

PROJECT:  
Legal & General  
Brand is everything

CATEGORY:  
1.1

SUB-CATEGORY  
Design and implementation  
over £100,000

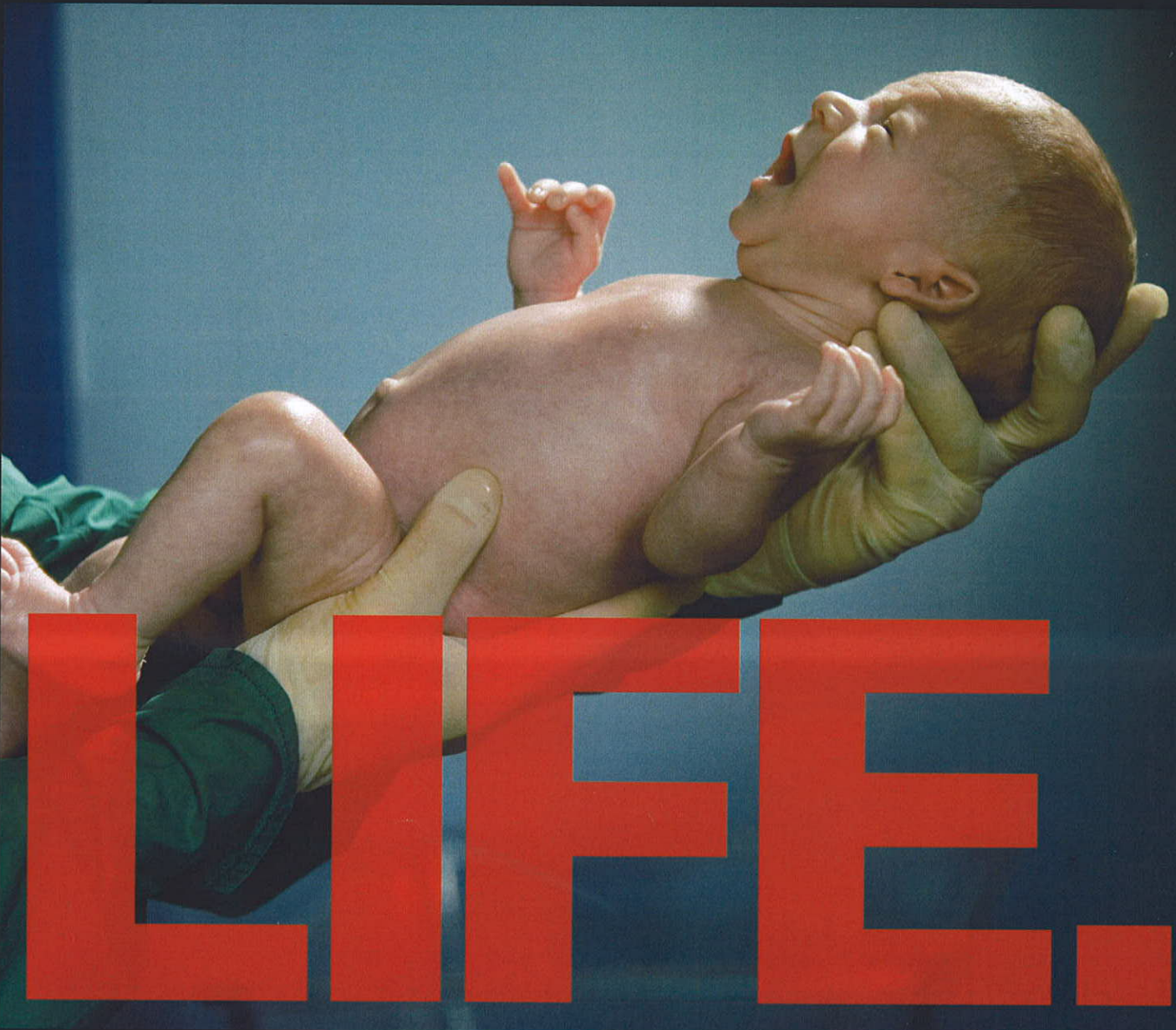
CLIENT COMPANY  
Legal & General

DESIGN COMPANY  
Smith & Milton

“Our vision is to be the UK’s outstanding risk, savings and investment management group - it is vital we have a strong, consistent and relevant brand.”

TIM BREEDON  
CHIEF EXECUTIVE- Legal and General

JULY 2011



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## COMMERCIAL RESULTS

Share price has risen  
from 81.55p to  
124.50p per share  
in the 52 week  
period July 2010  
to July 2011,  
a rise of **65.5%**

ADVOCACY AND  
BRAND ATTRACTION  
RAISED BY 15% IN  
2009 AND 16%  
IN 2010

# IMPROVED BRAND RANKING TO A+

(BRAND FINANCE 2011)

Share price has grown  
465% faster than the  
rest of the market

CASH GROWTH IN  
THE YEAR POST  
BRAND LAUNCH GREW  
BY £82 MILLION

# A 2.9% INCREASE IN MARKET SHARE IN 2010

Operating profits  
increased across  
the business by  
an average of 12%

IMPROVED BRAND  
PERFORMANCE ACROSS  
ALL 6 MEASURES

(RDSI REPORT)

SOURCES  
Brand Tracking Survey  
April 2011  
RDSI Research 2011  
Brand Team

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## COMMERCIAL RESULTS

We also have some individual business area highlights:

# RISK AWARDED PROTECTION PROVIDER OF THE YEAR 2010

## SAVINGS

Experienced a  
130% rise in profits

## INVESTMENTS 19% Increase in revenue

## GROUP

BEST EVER EMPLOYEE  
ENGAGEMENT SCORES  
AND THEIR BEST EVERY  
CONSUMER BRAND  
PERFORMANCE SCORE

SOURCES  
Brand Tracking Survey  
April 2011

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**If the DBA ever needed a paper on brand being more than just a logo, then this is it.**

In 2009, following an extensive programme of research and planning, Legal & General launched "Every Day Matters" - the organising thought and visual identity around which the business planned to deliver its objectives.

In 2010, the Chief Executive, Tim Breedon, outlined the boards' primary objective - for Legal & General to become a single brand. For a business as complex as Legal & General, this was never going to be a quick and easy task.

Legal & General is one of the UK's leading financial services providers. It is, therefore, one of the biggest, with over 6,000 employees across 5 UK locations including a substantial number of remote staff.

Our task over the least 2 years has been twofold:

Firstly, to develop the Organising Thought and new visual identity.

Secondly, to take all employees on a brand engagement journey, from Awareness to Understanding, to Action and finally to Advocacy - with the goal of engaging all staff to live, breathe and deliver the brand, from Board through to Grad placement and everyone in between.

The board knew that, if done well, the impact on the business would be huge. And all without any above the line support.

Below are the highlights of the results achieved in the period post launch in 2009 (these results were researched and published in April and May 2011 respectively).

**COMMERCIAL RESULTS**

24% BRAND  
VALUE  
GROWTH

**SOURCES**

Brand Finance 2011

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**PROJECT BRIEF**

Once the brand identity had been created, the objective was to bring it to life throughout the business, aligning each and every employee behind it and ensuring all communications were consistent and compelling.

**Our objectives were to:**

1. Create a relevant and compelling brand for our consumer and business audiences
2. Align the business and its employees behind the brand
3. Engage both internal marketing teams and external agencies to ensure quality and consistency
4. Engage the entire business through a brand engagement programme (top down)
5. Work alongside the Brand Team, ensuring the brand is at the heart of everything the business does

**A range of the old brand communications**

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## PROJECT DESCRIPTION

In order to manage the programme effectively, we worked through our process - Discover, Define, Develop, Deliver - across two main workstreams outlined in more detail below:

### Phase 1 / Brand Identity

Following an extensive audit and research programme, we developed the new brand identity.

One of the major brand challenges was the diversity of products / services / people / clients within the business - the new brand needed to be flexible, practical, compelling and engaging.

Our response was to put together the group brand toolkit (more detail section 6).

The new brand was built around an Organising Thought - "Every Day Matters" (EDM) a bi-product of the Engagement programme is that Every Day Matters is what the business refers to as its brand.

### Phase 2 / Brand Engagement

Following the creation of the new brand, we needed to bring it to life internally - another major challenge given the cultural history of the business, the complexity of the different business areas, all of whom had their own ways of working.

Our approach was twofold, targeting the marketing function to ensure consistency, and then the employees themselves to ensure every action, decision, every letter, email, phone call was driven by the Organising Thought.

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## MARKET OVERVIEW

Our primary challenge was neatly captured in the below paragraph (Harvard Business Review) that focuses on the low awareness and brand perception within the consumer market in 2009:

I don't know who you are.

I don't know your company.

I don't know your company's products.

I don't know what your company stands for.

I don't know your company's customers.

I don't know your company's reputation.

**NOW – WHAT WAS IT YOU WANTED TO SELL ME?**

The challenge also extended to the internal audience - with brand awareness and perception data as low as 6 % of the business when asked what the Legal & General brand stood for.

Legal & General also has a vital third audience, intermediaries / IFAs and Institutions - brand perceptions were extraordinarily low in this area.

A further issue was the business structure - with no central marketing department, each different business area has its own marketing team (30 in total) and each of those teams had a different way of communicating.

Old habits die hard as the first 12 months of the programme demonstrated.

We were also faced with a very competitive landscape, with multiple large corporations competing for the same audiences. One clear insight was that there was a gap in the market for a truly customer-centric business, one that built everything around the needs of its end-users, despite so much of the business being done through advisers and intermediaries.

## PROJECT LAUNCH DATE

PHASE 1  
BRAND IDENTITY  
September 2009

PHASE 2  
BRAND ENGAGEMENT  
Awareness phase  
October 2009

Understanding Phase  
October 2010

Commitment Phase  
March 2011

Advocacy  
Currently ongoing

## PROJECT BUDGET

PHASE 1 (including  
research and guidelines)  
Approx £300,000  
over 2 years

PHASE 2  
Brand engagement  
Approx £150,000  
over 2 years

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**DESIGN SOLUTION**

**DISCOVER:**

**Engage stakeholders and CEO**

- 200 customer interviews every month for 4 months
- Review of 400 competitor communications
- 50 interviews at senior management level
- 200 mass market online questionnaires
- 200 High Net Worth online questionnaires
- 200 mass affluent online questionnaires
- 10 focus groups
- 50 intermediary workshops
- 20 employee workshops





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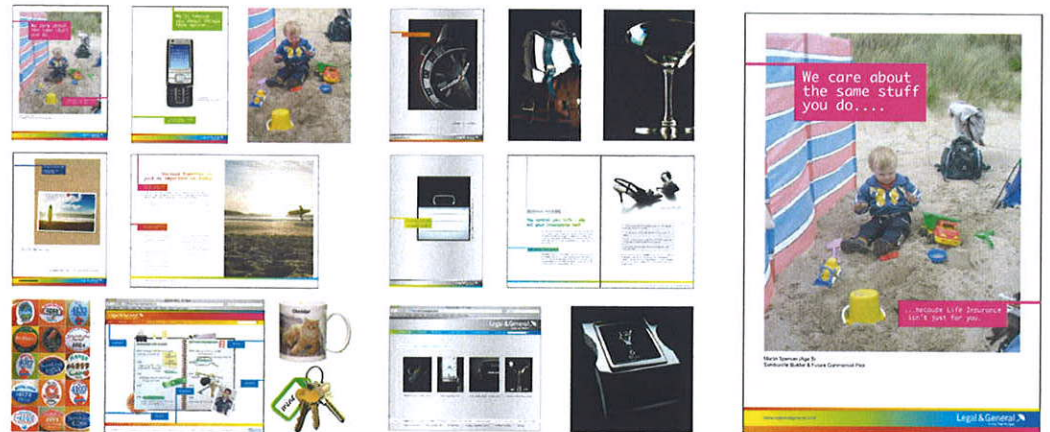
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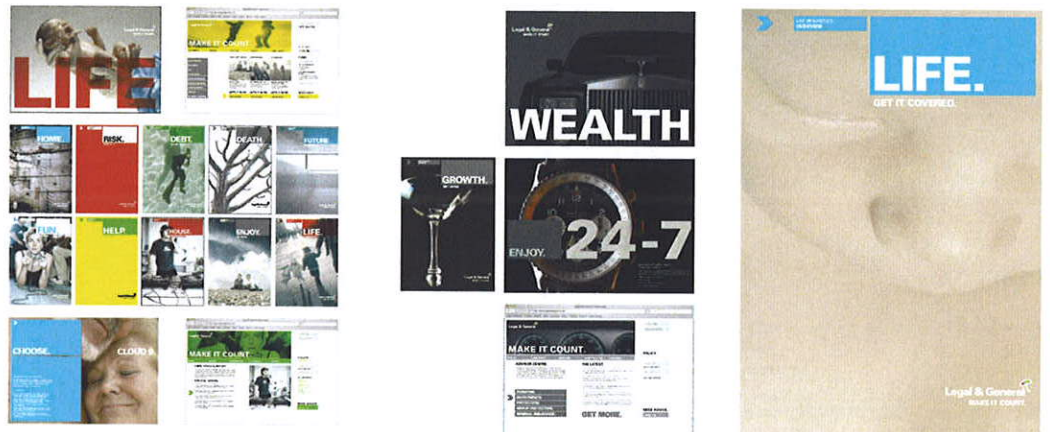
DESIGN SOLUTION

DEFINE:

Route 1



Route 2



Route 3



BRAND DEFINITION:

A range of different executions and ideas were tested throughout a detailed, rigorous research phase.

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CLIENT COMPANY Legal & General

DESIGN COMPANY Smith & Milton

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DESIGN SOLUTION

DEVELOP:

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### 3.0 TOOLKIT INTRODUCTION.

This section describes the visual elements in our brand toolkit. It's the kit of parts that, used in combination with the elements described in section 2.0, communicates our brand both visually and verbally.

While some of these parts can only be used in very specific and limited ways (like our landmark which must be very consistent), others can be used with great range and versatility.

Your brief will help determine how, when and even if you use all of these parts so that your communications are relevant for your product and audience.

TOOLKIT CONTENTS >

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### OUR TOOLKIT.

BRAND MARK COLOUR PHOTOGRAPHY ILLUSTRATION

TYPE

UNIVERS. Univers. Univers. Univers.

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### OUR COLOUR PALETTE - PRINT.

LEGAL & GENERAL BRAND  
LEGAL & GENERAL BRAND  
LEGAL & GENERAL BRAND  
LEGAL & GENERAL BRAND  
LEGAL & GENERAL BRAND

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### PHOTOGRAPHY - PEOPLE.

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### ILLUSTRATION - EXAMPLES.

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### NAVIGATION SYSTEM.

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### NAVIGATION SYSTEM - EXAMPLES.

BRAND GUIDELINES 14.0 2011

1.0 BRAND 2.0 COMMUNICATIONS 3.0 TOOLKIT 4.0 EXAMPLES

### TYPE ONLY SPREADS.

BRAND GUIDELINES 14.0 2011

BRAND GUIDELINES

The brand guidelines are extensive, thorough and robust yet allow the business and its agencies flexibility to communicate in a range of different ways thanks to the toolkit approach taken.

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DESIGN SOLUTION

DEVELOP:



The Banks and Building Societies team know that advisers don't have time to waste and want only the information they need, all in one place. They've produced a comprehensive guide to help them introduce all of Legal & General's products to their clients – a reason to believe Legal & General are working for their success.

Project for Alyson Bowcott  
Director, Banks and Building Societies Distribution Team

BEST PRACTICE

The most positively received piece of communication was the "Hello" brochure, a landmark piece in the new L&G brand style for it's direct, simple and clear tone of voice, encapsulating the essence of Every Day Matters.

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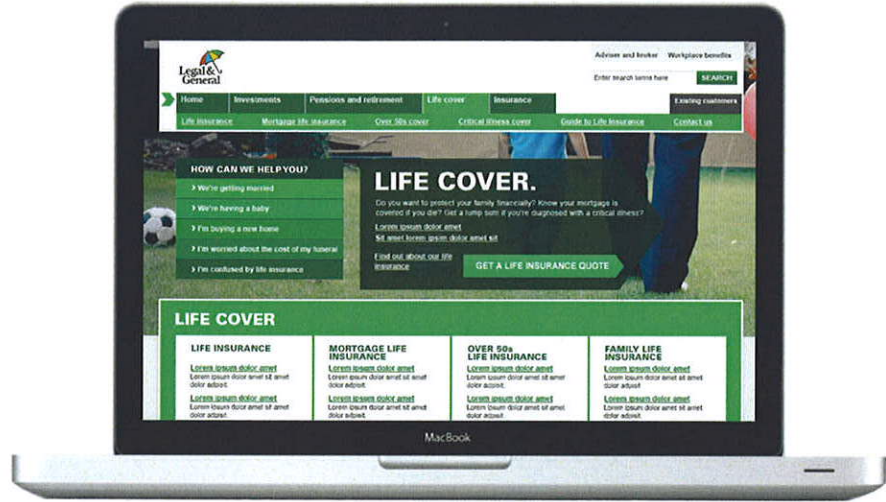
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DESIGN SOLUTION

DEVELOP:



BEST PRACTICE

The website was a primary focus for the new brand as a large portion of the business is done online. The programme took 18 months and is now winning awards for its ease of use and functionality. (We worked in partnership with Fortune Cookie)

BEST PRACTICE

The International business also needed to adopt the new brand, this piece for L&G Italy won a design award in 2010.



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DESIGN SOLUTION

DEVELOP:



LEGAL & GENERAL INVESTMENT MANAGEMENT

An example of the business need to differentiate can be seen through the LGM visual identity which we developed in 2010. Their audience is 100% institutional, which for a consumer-friendly brand is not relevant. We used the toolkit to create their own expression of Every Day Matters. In June 2011 they won an award for European Pensions Provider.



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DESIGN SOLUTION

DELIVER:



AWARENESS  
BRAND ENGAGEMENT  
PROGRAMME

ONE MAGAZINE

Another example of the brand in action is their Internal magazine, One.  
One company, one brand.

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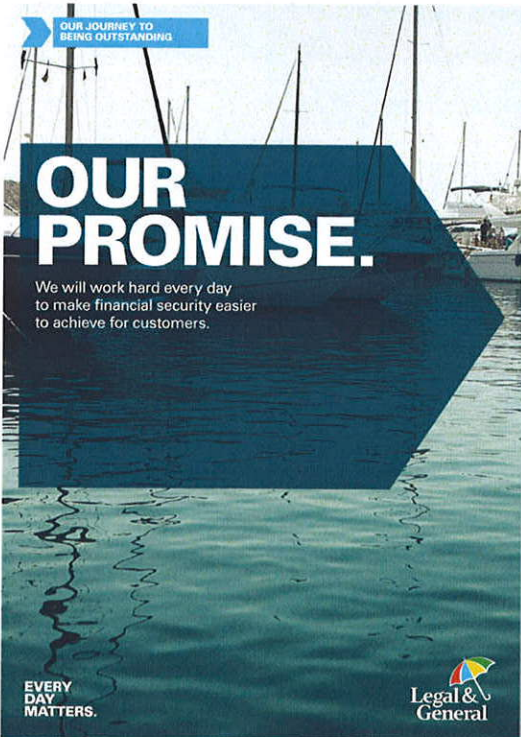
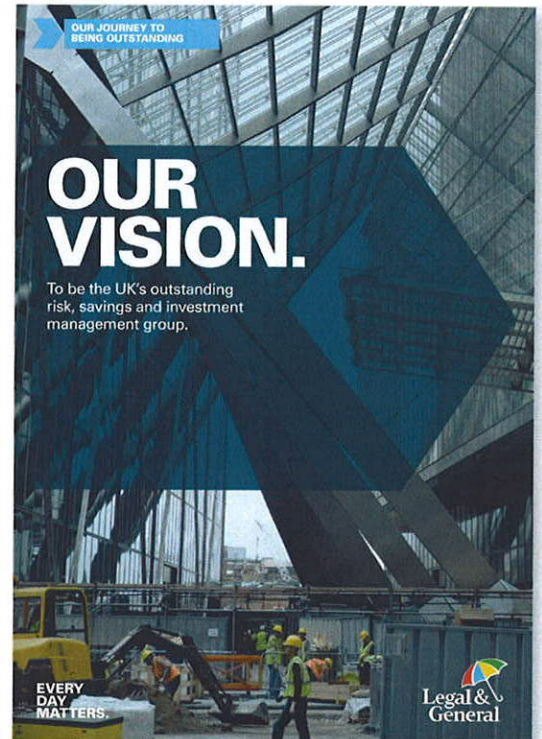
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DESIGN SOLUTION

DELIVER:



AWARENESS BRAND ENGAGEMENT PROGRAMME

STRATEGY POSTERS

This poster campaign ran across all sites to communicate the business, and brand, objectives.

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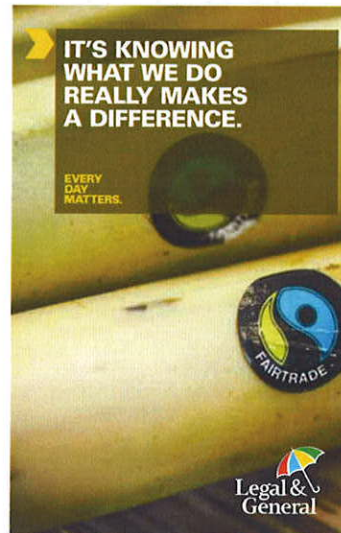
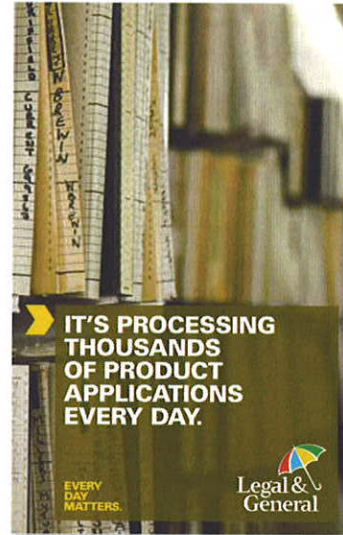
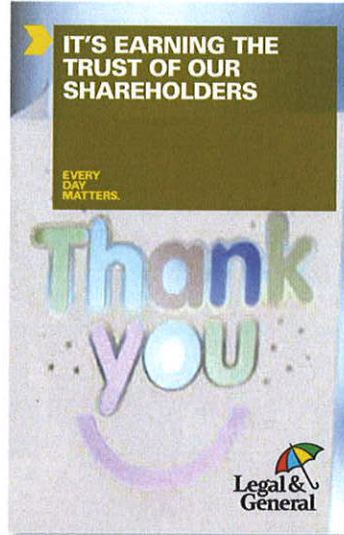
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DESIGN SOLUTION

DELIVER:



AWARENESS  
BRAND ENGAGEMENT  
PROGRAMME

KINGSWOOD PANELS

These panels are 10 foot high by 4 foot wide and they take pride of place in the headquarters across the UK. (16 different sets were developed)



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DESIGN SOLUTION

DELIVER:



UNDERSTANDING  
BRAND VIDEO

We brought the brand to life through the brand video, communicating exactly what working at Legal & General means. Please see appendix for brand video.

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**Our brand is our most valuable intangible asset, currently worth £1.3billion. It creates demand, secures business partners, reassures financial markets and drives total shareholder returns.**

The most successful organisations recognise the need to understand brand and its value when making strategic decisions. If we are to achieve our vision of being the outstanding risk, savings and investment management group, we too must consider brand when making business decisions.

Our aim is to build a company that, every single day, becomes even better at understanding, serving and rewarding our customers and shareholders. To do this we must recognise that customers are at the heart of our business and, consequently, we must work hard to build long-term positive relationships with them.

Our success relies on understanding what matters to people, people just like you, regarding their financial lives. It demonstrates how we relate to the day-to-day lives and concerns of our customers, how we help people; whether it's protecting against unforeseen circumstances, helping to save for retirement or investing money wisely so that it grows over time. It reminds us of the kind of lives our customers lead. The lives we want to make a difference to. Throughout Legal & General, we're helping customers like these achieve financial security every day.

This book, like the brand film you have seen, demonstrates the strong connection between Every Day Matters and our social purpose – showing that we're a force for good in society. Hopefully, it will help everyone understand what we, as a company, stand for, care about and believe in.

Tim Breedon CEO



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DESIGN SOLUTION

DELIVER:



ACTION  
BRAND BOOK

Building on the brand video, and with the front cover replicating the final clip of the video, the brand book goes to the next level of emotional connection, through a series of consumer stories that capture the indirect benefit of Legal & General, it's role in society and communicating how it is truly a force for good.



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## DESIGN SOLUTION

# DELIVER:



## ACTION BRAND BOOK

More shocking, impactful  
imagery was used as part  
of the evolution of the  
EDM brand.

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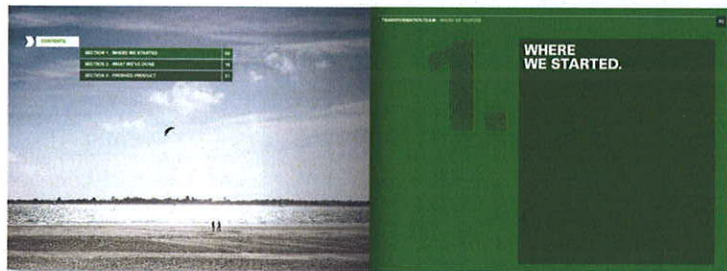
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DESIGN SOLUTION

DELIVER:

**THE TRANSFORMATION TEAM - GUIDE**

**YOU ARE THE BRAND.** Only you can make Legal & General outstanding. Finance plays an important role in everybody's life, and good financial companies are those that connect with customers' lives accordingly. As a financial services provider, our customers rely on us, whether it's protecting against unforeseen circumstances, helping to save for retirement or investing money wisely so that it grows over time. We must continue to deliver what really matters to our business partners and advisers to help millions of customers manage their financial future.

**1. WHERE WE STARTED.**



**TO BE MEMORABLE, RELEVANT AND OUTSTANDING, WE NEED TO MAKE SURE PEOPLE KNOW ABOUT US AND WHAT WE DO.**

- What do you offer, why and how?
- What do you stand for?
- What makes your company's identity?
- What do you offer your company's stakeholders?
- What makes your company's relationship?
- What do you stand for?
- What do you stand for?

**HOW - WHAT WAS IT YOU WANTED TO SELL ME?**

**A.** [Text]

**B.** [Text]

**C.** [Text]



**2. WHAT WE'VE DONE TO IDENTIFY OUR ORGANISING THOUGHT.**

ADVOCACY

Transformation Team  
As part of the Brand Advocacy programme, we helped the brand team form the Transformation Team, selecting 20 brand advocates from different business areas to help us deliver the brand message through the business.

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DESIGN SOLUTION

DELIVER:

**BRAND AUDIT**

## BRAND AUDIT RESULTS (Q1).

TITLE OF COLLATERAL

**A** INFORMATION NAVIGATION / LAYOUT

1	2	3	4	5	Comments
---	---	---	---	---	----------

**B** PHOTOGRAPHY

1	2	3	4	5	Comments
---	---	---	---	---	----------

**C** MESSAGING

1	2	3	4	5	Comments
---	---	---	---	---	----------

**D** REASON TO BELIEVE

1	2	3	4	5	Comments
---	---	---	---	---	----------

**E** OVERALL USE OF TOOLKIT

1	2	3	4	5	Comments
---	---	---	---	---	----------

ADVOCACY  
CREATIVE DIRECTORS  
FORUM

To increase brand consistency in their communications, we formed the Creative Directors Forum - a programme in which we work with the brand team to pinpoint areas of brand delivery requiring development, such as agency training, brand toolkit improvements.

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## TIMING PLAN FOR DELIVER

### PHASE

#### 2009

- Q1 Research programme
- Q2 Organising Thought / Brand identity development
- Q3 Launch Organising Thought and new identity to marketing community
- Q4 Guidelines v1 & Web launch

#### 2010

- Q1 Formation of Steering Groups  
Brand workshops & training
- Q2 Employee engagement campaign  
Communication of EDM strategy
- Q3 Guidelines v2 & training
- Q4 Launch of brand video internally

#### 2011

- Q1 Launch Brand Book  
Roster agency brand training & development programme  
Embedding of EDM in behaviours and culture  
Launch of EDM across Legal & General America
- Q2 Brand is lead topic at L&G Leadership Conference (Top 50)
- Q3 Direct to consumer activity being planned (for the first time in over 10 years)

### DELIVER TIMING PLAN

Above are the key milestones from the Brand programme. On top of these key elements, much time has been spent working strategically with the brand team on ensuring the brand is understood, and actioned, by all key stakeholders

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## DESIGN COMPANY

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## SUMMARY OF RESULTS

## INCREASE IN SALES

- Average 12 % rise in operating profits  
Annual Report 2010.
- Cash growth of £82 million  
In the period post brand launch.
- The Savings business experienced a 130 % rise in profits  
Attributed to clarity of message to intermediaries and advisers.
- The Investments business experienced a 19 % rise in revenues  
Attributed to clarity of message to intermediaries and advisers.
- 2.9 % increase in market share  
Attributed to clarity of message to intermediaries and advisers.

## IMPROVEMENTS IN STAFF MORALE

- A positive rise in all brand measurement criteria.

In 2010 there was improvement in employee engagement, as measured by our employee survey. The survey is directly linked to Every Day Matters – a link with our brand demonstrating that what we think, feel and do as employees impacts on our success as a business and, ultimately, on our customers. Our engagement index score increased from 65 % to 74 % in 2010 -the highest-level engagement score to date.

MEASURE	2009	2010
Employee engagement index scores	65	<b>74</b>
% of employees that understand strategy	50	<b>71</b>

EMPLOYEE  
ENGAGEMENT  
INCREASED  
TO 74 %



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## SUMMARY OF RESULTS

### IMPROVEMENTS IN CONSUMER ATTITUDES OR BEHAVIOUR

- Best ever consumer brand performance score

MEASURE	Q1 2010	Q2 2010	Q3 2010	Q4 2010	YEAR END VARIANCE
Advocacy	17%	15%	15%	32%	<b>+15%</b>
Brand attraction score	-8	-2	-2	8	<b>+16</b>

Source: RDSI brand tracking research 2010 - 200/month

### IMPROVED CONVERSION RATES

**Retail Savings Retention figure passes £1billion mark.**

Retail Savings understand the importance of engaging with customers in order to retain their business. In fact they recently passed £1billion of retained assets.

“Mark Gregory explains why retention is so important to Retail Savings. ‘In Savings we generate our income from charges or fees on Assets Under Management. The fantastic efforts of all the people involved in retention mean that through engaging with our customers and building better relationships with them we are able to make a direct impact on our cash generation and profits.

Making sure we retain customers is incredibly important to Savings. It is expensive getting new customers, so once they are with us we want to make sure they stay with us for as long as possible. Helping them understand how our products can be flexible to meet their needs as they change throughout their lives is mutually beneficial.”

### IMPROVED RECRUITMENT

- Since the brand launch, high quality business leaders have been attracted to the business across all business groups.

The business is experiencing its best ever employee engagement scores.

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ON BEHALF OF SMITH AND MILTON

ON BEHALF OF LEGAL & GENERAL

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BEN MOTT  
Business Director  
ben@smithandmilton.com



HELEN STEADMAN  
Group Brand Strategy Manager  
helen.steadman@landg.com

PROJECT:

Legal & General  
Brand is everything

CATEGORY:

1.1

SUB-CATEGORY

Design and implementation  
over £100,000

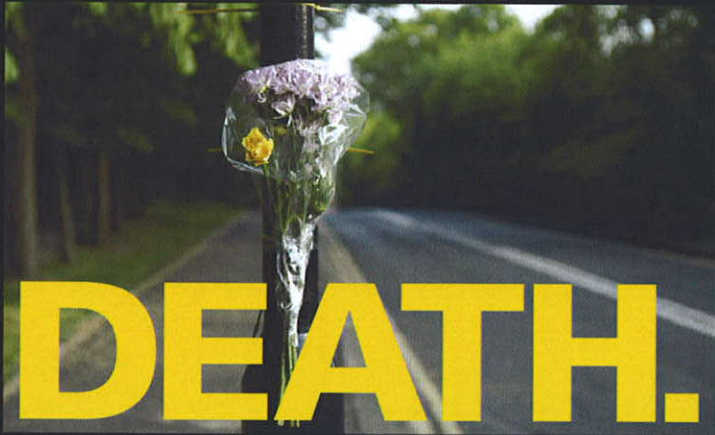
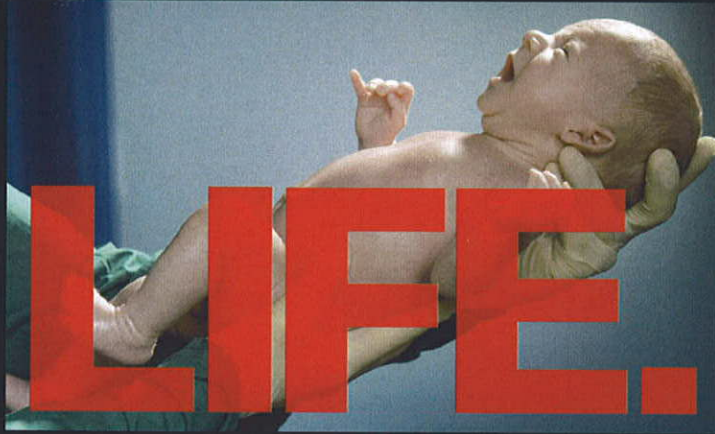
CLIENT COMPANY

Legal & General

DESIGN COMPANY

Smith & Milton

JULY 2011



AND  
EVERYTHING  
IN BETWEEN.

WE KNOW  
THAT  
EVERY  
DAY  
MATTERS.



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“In our industry, very few brands have managed to create real differentiation and impact in peoples’ minds. A question such as, “What does Legal & General offer or do that’s different from other providers?” generally leads to a puzzled silence.

I’d like to change this. I would like to create a meaningful brand, aligned with our business strategy. How? By helping people see us as a brand that provides unique, relevant benefits that match their real needs at price they can afford.

Our customers rely on us, whether it’s protecting against unforeseen circumstances. We must continue to deliver what really matters to help millions of customers manage their financial future. This is our social purpose - understanding people’s financial needs, pooling risk and helping society by reducing the pressure on strained public finances – it demonstrates that we are a force for good and it sits at the heart of our business and is expressed through Every Day Matters.

Because of this, I would like you to be proud of our brand. I am.

I want you to deliver our brand promise each and every day, so our position of leadership in broader society is strengthened and we deliver the returns our shareholders and customers expect.

Every day really does matter and I, like you, must put pace and energy into what I do, to treat everything I do for my customers as so important that I get it right, do it well, and give confidence that I care about what I do and will be there to deliver on my promises. Because that is what matters to customers, every day.”

Tim Breedon  
Group Chief Executive