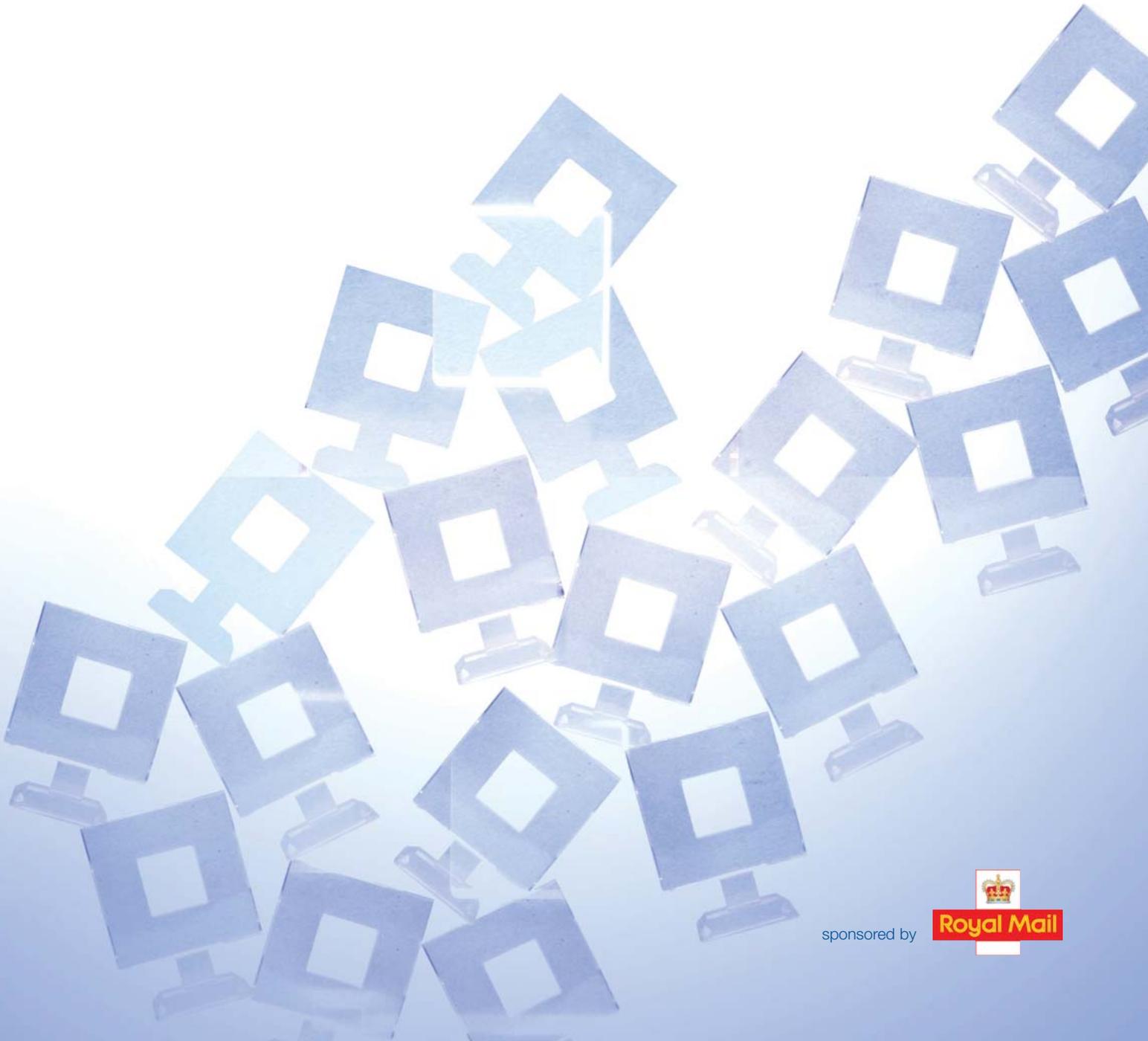




The Financial  
Services Forum

**7th Annual Awards**  
for Marketing Effectiveness

2008



sponsored by





Royal Mail is proud to support The Financial Services Forum which represents one of the most important sectors for our business. In this increasingly challenging media environment, we are committed to furthering our close working relationship to help you improve your customer communications and relationships, whilst getting the best possible return from your investment in direct mail. Mail has a proven multiplier effect when used in conjunction with all other media, and Royal Mail's is the only network that can touch the whole nation every working day. That's greater penetration than any other media channel, including TV, radio, web and telephones. A good mailpiece is hard to ignore, it stimulates all of the senses, it can carry a huge amount of information, it engages the recipient, you can't switch it off, and you don't need special equipment to access it – just a letterbox. We look forward to furthering our fruitful partnership with The Financial Services Forum, its members and the companies it represents.

## John Ead

GENERAL MANAGER, FINANCIAL SERVICES, ROYAL MAIL

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## The judging panel

### Guy Beresiner

HEAD OF CLIENT STRATEGY, YAHOO! UK & IRELAND

### Gill Cattanach

FORMER MARKETING DIRECTOR, ALLIANCE TRUST

### Leslie de Chernatony

PROFESSOR OF BRAND MARKETING, BIRMINGHAM BUSINESS SCHOOL

### Mark Goodman

DISTRIBUTION DIRECTOR, ZURICH FINANCIAL SERVICES INTERNATIONAL

### Jacqui Haskins

MARKETING DIRECTOR, M&G INVESTMENTS

### Gary Hockey-Morley

MARKETING DIRECTOR, THE POST OFFICE

### Glenn King

GENERAL MANAGER CUSTOMER STRATEGY & DELIVERY, NATIONAL AUSTRALIA GROUP

### Andrew Norton

HEAD OF ALTERNATIVE CHANNELS, HALIFAX GROUP

### Malcolm Oliver

CONTRIBUTING AUTHOR, ARGENT

### Andrew Porter

MANAGING DIRECTOR, THE FINANCIAL SERVICES FORUM

### Thierry Saada

SECTOR DIRECTOR, ROYAL MAIL

### Neil Scaife

PLANNING DIRECTOR, WPP GROUP

### Alan Thompson

CHIEF EXECUTIVE, THE HAYSTACK GROUP

### Anthony Thomson

CHIEF EXECUTIVE, THE FINANCIAL SERVICES FORUM

### Patrick Waldron

CHIEF EXECUTIVE, POST OFFICE FINANCIAL SERVICES

## Most Effective Sponsorship Campaign



### WINNER

#### **Nationwide Building Society:** Sponsored by You

As sponsor of the four home nation football teams, Nationwide has exclusive money can't buy football prizes and experiences that no other sponsor can rival.

As a building society, Nationwide is owned by its customers, which means that when they sponsor the national football teams, so do all of their customers.

Through 'sponsored by you' Nationwide returns all of these exclusive football prizes and experiences directly back to its customers.

An integrated marketing campaign has been in place to drive customers to [www.sponsoredbyyou.com](http://www.sponsoredbyyou.com). As well as providing competition information, this constantly evolving site provides exclusive content on all four of the home nation teams. The success of the sponsorship has been demonstrated through impressive customer endorsements, strong web and research metrics, and robust media evaluation results.

### COMMENDED

#### **Coutts & Co:** London Jewellery Week

#### **Friends Provident:** 175 not out

#### **National Savings & Investments:** Classical Music Territory

## Most Effective Public Relations Campaign



### WINNER

#### **IFA Promotions/Unbiased.co.uk:** The Blue Book (Entry by Lansons Communications)

Faced with the challenge of trying to raise awareness of Independent Financial Advisers amongst the hugely influential personal finance press – the team took the daring move of facilitating more interaction between these two – often opinionated – groups.

By creating, promoting and maintaining a directory – both offline and online – the 'Blue Book' has become a brand in the personal finance world in its own right. As Jeff Prestridge says in the latest edition – no personal finance journalist should be without a copy.

The efforts have demonstrably increased the media's perception of the concept of Independent Financial Advise and led to more media using the 'Blue Book' to source informed comment, and consequentially, more coverage where consumers can see IFAs – branded as such – doing what they do best. Namely – giving advice on all manner of financial issues.

### COMMENDED

#### **Lloyds TSB Insurance:** Response to the 2007 Floods

#### **Engage Mututal:** 3GB Mutuality in Modern Britain

## Most Effective Direct Marketing Campaign



### WINNER

**National Australia Group:** Integrating channel management to maximise campaign effectiveness

NAG has used extensive customer and staff insight to develop a highly effective and integrated approach to its marketing programmes through CRM. The development of an optimised decision engine (Next Best Conversation) has significantly added value to the overall organisation, increased satisfaction levels amongst key target customer segments and also increased overall staff productivity. Additionally, substantial cost savings have been achieved within the retail network that has supported improved business performance for the UK Group.

### COMMENDED

**Bank of Ireland:** Fortune Cookie Campaign

**Lloyds TSB Insurance:** Prospect IQ

**Stroud & Swindon Building Society:** Targeted Customer Newsletter

## Most Effective Advertising Campaign



### WINNER

**National Savings & Investments:** [mylostaccount.org.uk](http://mylostaccount.org.uk)

This is a new brand launch and campaign designed to do the one thing no financial company ordinarily wants to do: take money out of their coffers.

But this is exactly what [mylostaccount.org.uk](http://mylostaccount.org.uk) was created to do.

In January 2008, NS&I, alongside the BBA and the BSA, launched the innovative but straightforward [mylostaccount.org.uk](http://mylostaccount.org.uk) with the specific objective of reuniting people with money in long lost or forgotten accounts.

[Mylostaccount.org.uk](http://mylostaccount.org.uk) was launched with a fully integrated campaign, with outstanding results - £24m reunited in the first four months, outstripping all targets along the way.

### COMMENDED

**Direct Line:** Direct Line (Entry by M&C Saatchi)

**Insurance4carhire:** Testing Online Display Advertising

**Nationwide Building Society:** Home Insurance BRTV & DRTV Campaign (Entry by Tangible Financial)

**Life Trust Insurance:** Launch of Life Trust

## Most Effective Media Planning

 Lloyds TSB | Commercial **WINNER**

### **Lloyds TSB Commercial:** Lloyds TSB Business Banking

The business start-up market is becoming an increasingly challenging space due to increased competition and a decline in volume of start-ups. In a market clouded by cynicism towards banks, LTSB needed to persuade start-ups to choose them as a bank for their small business needs. A big target was set against a relatively niche audience, so it was clear that the old 'rule book' had to be dispensed with and an insight-based media planning solution that clearly presented the expertise of the bank had to be embraced. The result was a fully integrated campaign that combined advertising with sponsorship, content generation and experiential activity. Overall results were excellent and beyond expectation. In terms of marketing effectiveness, the campaign as a whole delivered an ROI of £7 for every £1 spent.

### **COMMENDED**

**AXA Sun Life Direct:** Mission Impossible – Sustaining Growth in a Competitive Market

## Most Effective Internal Marketing



### **WINNER**

### **Volkswagen Financial Services:** Driving our Future

Volkswagen Financial Services (VWFS) the provider of retail finance, insurance and banking products for Volkswagen Group retailers and customers, set out to accelerate the rate of business growth.

In order to achieve this VWFS had to maximise its most important asset – its people. Through an integrated series of activities branded “Driving our Future” combining both performance improvement and communication actions, VWFS saw sales growth of over 25% in the first five months of 2008 (compared to sales growth of 15% in 2007).

Through engaging people to perform at their highest level and create a place where people want to stay, VWFS are pushing the boundaries of new business acquisition and customer retention against a background of difficulties in the financial services markets.

### **COMMENDED**

**HSBC – HSBC**

**National Australia Group:** Supporting the Cultural Shift of Payments

**Norwich Union Healthcare:** Health Vision – ‘Our Company, Our Health’  
(Entry by Teamspirit)

**Standard Chartered:** Vision 2011 – Dare to Dream

## Most Effective Corporate Social Responsibility



### WINNER

#### **Capital One Bank:** Capital One and Scope

In 2006, Capital One identified three key objectives:

- raise employee morale
- increase the diversity of employees within the business
- drive national awareness of the need for equality for disabled people

In working with Scope, a leading disability charity in the UK, Capital One established a partnership to generate a sustainable yearly internal and external facing campaign.

The 2006/07 campaign included a fundraising challenge for 23 employees to run the London Marathon, a networking event based at it's Nottingham headquarters, national advertising, direct mail, PR, work placement opportunities for disabled graduates, volunteering and in-kind benefit.

### COMMENDED

#### **Bank of America Europe Card Services:** The National Trust Affinity Credit Card Agreement

## Most Effective New Product, Service or Innovation



### WINNER

#### **ibuyeco insurance:** The launch of ibuyeco insurance

ibuyeco, just one year old but already an established insurance brand, is the product of an unusual and innovative journey. Backed by the BGL Group, one of the UK's largest privately-owned personal lines insurance intermediaries, the idea for ibuyeco came from an internal 'Dragons' Den' exercise at the Group's senior management conference in Autumn 2006. The brand was created in just six months – from initial product idea to the soft launch in April 2007. It is already a major player in the car insurance market with a unique and growing appeal to customers.

### COMMENDED

#### **JCB Finance Ltd:** Take a Break

#### **National Savings & Investments:** [mylostaccount.org.uk](http://mylostaccount.org.uk)

#### **Wesleyan Assurance Society:** Wesleyan for Lawyers (Entry by Promodus)

## Most Effective Integrated B2B Campaign



### WINNER

#### **Prudential: A Retirement with More Potential** (Entry by Teamspirit)

While market leader in annuities and the UK's most trusted brand name in pensions, Prudential's full product range was seen as being disparate by IFAs. In early 2007 Prudential refocused its business, products and service around retirement. In October, they relaunched their brand in line with this, offering 'a retirement with more potential'. Extensive research and analysis had revealed the issues – and barriers – that would need to be overcome to win the hearts and minds of IFAs. Since the October relaunch complementary, integrated media have been leveraged to achieve individual, combined and business level targets – and uplift targeted adviser perceptions towards Prudential. Within eight months, all of these objectives had been achieved and exceeded.

### COMMENDED

#### **Wave Lending: Wave Hello**

#### **Wesleyan Assurance Society: Wesleyan for Lawyers** (Entry by Promodus)

## Most Effective Integrated Consumer Campaign



### WINNER

#### **Churchill Car Insurance: Quiz Show**

In 2008, Churchill needed a new campaign to outperform the successful Challenge Churchill 'Road Show' activity, in a much tougher competitive environment. The solution was developing a strong idea and visual theme that could work across a range of media formats in order to punch above its weight.

The new 'Quiz Show' campaign featured the dog being put under the spotlight and rising to challenges. The strong creative concept spanned TV, outdoor, radio, online, press, DM and sponsorship and exceeded all targets achieving the highest ever first mentions, cut-through and brand awareness, and sales grew to the highest recorded level in Churchill's history.

### COMMENDED

#### **Britannia Building Society: Building a Fairer Society** (Entry by McCann-Erickson Manchester)

#### **Nationwide Building Society: Price Rewind**

## Most Effective Digital Marketing



### WINNER

#### **IFA Promotion:** Integrated Online Strategy (Entry by Teamspirit)

IFA Promotion worked with its agencies to redirect their total communications into an online environment, thus taking early advantage of the fact that an increasing number of consumers (25% of ABC1 adults) now go online to research their financial advice options. The new strategy helped focus the core message of the value of truly independent financial advice into the key financial pages of websites, where their target market would be conducting their research. Effective tracking enabled IFAP to monitor exactly where responses were coming from and therefore continuously improve performance. This helped IFAP to demonstrate its undoubted value to consumers, members and sponsors alike.

### COMMENDED

#### **National Savings & Investments:** [mylostaccount.org.uk](http://mylostaccount.org.uk)

#### **Nationwide Building Society:** Online Adaptive Media Campaign

## Judges' Award for Best Consumer Insight



### WINNER

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## Judges' Award for Best Contribution to Marketing Learning



### WINNER

#### Volkswagen Financial Services: Driving our Future

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## Judges' Award for Marketing Excellence



### WINNER

#### IFA Promotion

With the help of their agencies, IFA Promotion / Unbiased.co.uk have demonstrated marketing excellence through a number of categories and channels, achieving quality and consistency with a very small budget. Their continued success has been an example of how good quality marketing can be good for both the company and the consumer.

## Agency of the Year



### WINNER

#### Lansons Communications

Lansons Communications is not only the largest specialist financial services agency, but also the 3rd largest independently-owned PR agency in the UK. From their origins in financial services they have built a business that encompasses everything from strategic advice through to day-to-day hands on media relations programmes – for clients both large and small – from within and outside the financial services industry. Their clients include IFA Promotion, Fidelity Investments, RBS Insurance and Scottish Widows

Their focus on ‘effective creativity’ resulted in Lansons being short listed for more awards over the last two years than any other UK PR agency

Lansons prides itself on running campaigns that influence behaviour – not just increases brand awareness.

The three campaigns that demonstrate a significant change in the behaviour of the target audience include IFA Promotion’s Blue Book, Pruhealth and Scottish Widows.

## Young Marketer of the Year



### **WINNER**

#### **Narinder Singh, Marketing Manager, Wesleyan Assurance Society**

Narinder was recruited at the end of 2006 to be the lead marketer for the launch of Wesleyan for Lawyers, the first new brand to be launched by Wesleyan Assurance Society since 2003, opening up a significant new sales channel.

Within six months Narinder had completed a detailed marketing plan, appointed a specialist agency, set budgets (which he has controlled meticulously) and delivered a highly successful launch. He is now in the throes of a national rollout for the brand.

The fully integrated launch campaign has demonstrated Narinder's excellent grasp of all marketing disciplines including advertising, digital, direct marketing, sales literature, sponsorship, live events and PR.

Narinder has taken every opportunity to learn about his marketplace. He instigated research to learn more about lawyers' lifestyles to provide even greater insight and attends many legal events in his own time.

During the campaign roll out, Narinder implemented a rigorous 'Test and Learn' process across all areas including creative, promotional offers, DM & digital responses. This has played a crucial part in the success of the programme.

Narinder is an extremely effective bridge between his marketing department, the agency, the sales force, internal stakeholders and the market. This has resulted in some highly effective campaigns; all measured and tracked

by Narinder. The most notable results include:

- Launch of a sub brand: 'Wesleyan for Lawyers'
- Leads generated by marketing activity were 309% of target
- Total sales were 193% of target
- Brand awareness amongst the target segment area has grown from 0% to 50% in six months

Due to these outstanding results, the national expansion has accelerated ahead of schedule – all managed by Narinder.

## Marketer of the Year



### **WINNER**

#### **Justin Basini, Head of Brand Marketing, Capital One Bank Europe**

Justin sits on the leadership team of Capital One in Europe and runs all marketing and brand strategy and execution. Capital One has become one of the leading financial services brands in the UK. By developing segmentation strategies, consumer insights and responding to customer behaviour, Capital One has become:

- the #4 internet marketer in the UK
- #1 above the line credit card advertiser
- and continues to be the #1 acquirer of new credit card customers in the UK.

Justin has sought to align the brand with the strategic direction of the business, building a leading brand marketing capability and driving customer focus through the business.

Highlights include:

- Hiring a team of exceptional marketing talent
- Continuing to challenge the market and innovate for the good of the consumer - such as offering customers a free and unique early warning against Identity Theft
- Driving efficiency into the outbound marketing model via digital marketing strategies and sophisticated evaluation techniques
- Delivering significant value to the business in acquiring customers at historically competitive cost by driving commerciality throughout the business
- Recognising that as a major marketer in the UK Capital One has a responsibility to lead, specifically in environmental marketing. It has reduced its carbon footprint by 50%, reduced its outbound mail volumes, moved to 100% recycled paper, and adopted the PAS2020 environmental standard. Justin has personally championed this cause and led the debate through various industry forums.



## The Financial Services Forum

In the year 2000, a handful of senior financial services executives met informally to share ideas with their industry peers. So began The Financial Services Forum: a meeting place for like-minded professionals to debate business issues, with a primary focus on how to improve their marketing effectiveness.

That small group has grown each year to the current community of over 500 Members.

### Putting marketing effectiveness first

The Financial Services Forum exists to generate debate and provide insights that will help our Members improve their marketing effectiveness. We believe that more professional marketing is not only good for the financial services industry, but also good for the customer.

### Reflecting the diversity of the financial services industry

We recognise that the financial services industry is not a homogenous community. To reflect its diversity we address the challenges facing specific sectors via a number of Special Interest Groups, covering industry agendas as well as key marketing disciplines. We address consumer marketing issues, but also B2B and institutional marketing topics.

### Advised by industry leaders

Content at our events, and in our publications, is designed for our Members, by our Members. Our Advisory Board comprises leaders from across the industry, supported by Steering Committees in each of our Special Interest Groups where industry professionals advise us on the issues of the day and the themes we should be addressing to stimulate discussion and debate.

### Delivered by experts

The Forum takes an independent and objective view on who should present at our events or write for our publications. We aim to select the best speakers and authors, to provide a platform for thought leaders and expert practitioners, solely for the benefit of our Members.

### The right people

Being part of a community of like-minded marketers provides our Members with a valuable network of their industry peers. These relationships are built over many years and can last a professional lifetime. We are privileged simply to provide the opportunities for our Members to meet and get to know each other.

### The right balance

Our Full Members are Director-level business leaders, usually responsible for their organisation's marketing strategy. Our growing Associate community provides a forum for marketing and communications managers, offering best practice models and case studies for those actively engaged in running their organisation's marketing campaigns. And, most recently, our Practitioner Members reflect the important contribution to new learning in financial services marketing from agencies and consultancies across all disciplines.

### Individual membership

Membership of The Financial Services Forum is on an individual basis, and various organisations see the benefit of supporting several Full and Associate memberships. Our membership rules permit some flexibility to allow Members to bring a guest and / or send an alternate to Forum events on a limited number of occasions each year.

### Annual subscription

In exchange for a single annual subscription, Members can access any of the events they are eligible to attend within their membership category, free of charge. None of our seminars or conferences carry a separate entry charge.

### How to join

If you would like to be considered for membership of The Financial Services Forum, further information and an application form can be found on [www.thefsf.com](http://www.thefsf.com). Alternatively, you can speak with Andrew Porter, Managing Director, on 020 7449 9000.



## The Financial Services Forum

### Advisory Board Members

#### Chairman

Mike Tildesley

MARKETING DIRECTOR, DIRECT LINE

#### Members

Keith Carby

CHIEF EXECUTIVE OFFICER, OPENWORK

Leslie de Chernatony

PROFESSOR OF BRAND MARKETING, BIRMINGHAM UNIVERSITY BUSINESS SCHOOL

Christine Ennew

DEAN OF LAW & SOCIAL SCIENCES, PROFESSOR OF MARKETING, NOTTINGHAM UNIVERSITY

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Howard Flight

Nigel Gilbert

GROUP MARKETING DIRECTOR, LLOYDS TSB

Mark Goodman

DISTRIBUTION DIRECTOR,  
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Graham Kane

HEAD OF UK RETAIL,  
UBS GLOBAL ASSET MANAGEMENT LTD

Paul Pester

MANAGING DIRECTOR, PREMIUM BANKING, SANTANDER

Andrew Porter

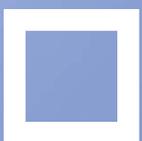
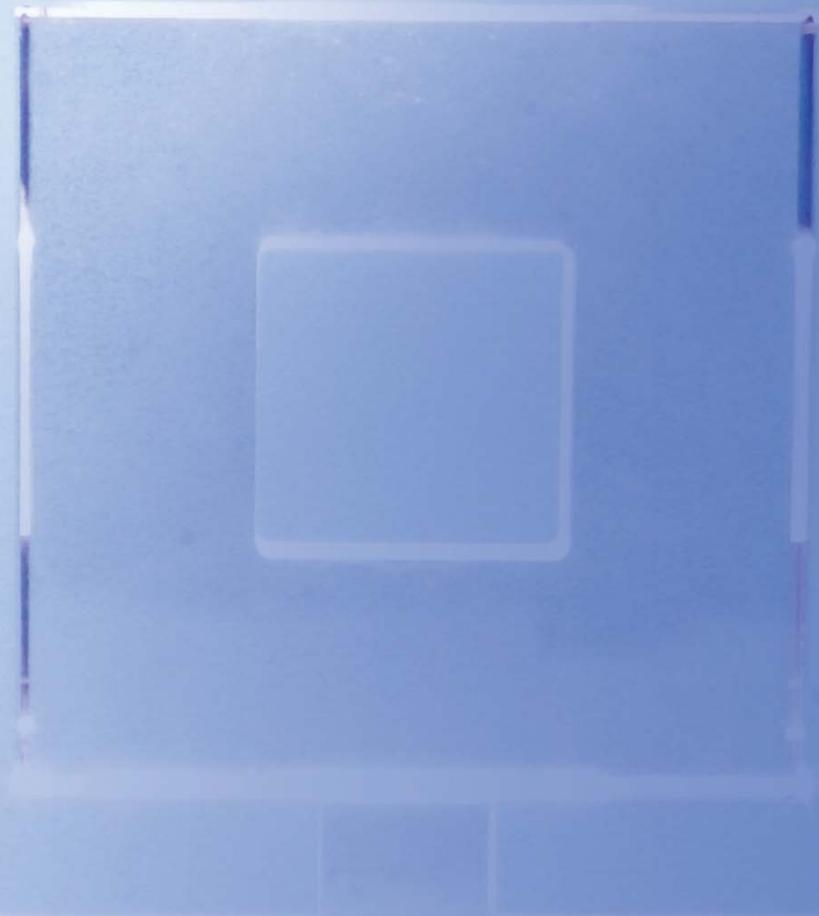
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