

**MBC|strategic**

Marketing. Branding. Communications.

# ESSENTIAL 2021 **FINANCIAL & INVESTMENT MARKETING DESIGN** STRATEGIES

5 ways to develop a sophisticated brand presence in financial services

# STAYING DESIGN-RELEVANT IN THE DIGITAL AGE

Design is an opportunity to greatly impact clients by influencing their decision-making, building trust and creating loyal partners that will stay with you across market cycles. Similar to how an investment manager generates alpha through differentiated strategies, maintaining a leadership position in branding can give you a long-term leg up in the competitive quest for assets under management. Implementing modern design and branding tactics doesn't just allow you to outshine the competition, it can help provide a sustainable advantage over your peers, as well as strategic resilience for your firm in times of market volatility.

# 94%

OF FIRST IMPRESSIONS FOR A WEBSITE ARE DESIGN-RELATED<sup>1</sup>

## Early Stages are an Opportunity

The digital era is upon us, and it is more important than ever for financial firms to ensure they are well-positioned to stand out in a sector experiencing a technological transition. Such a rapid shift towards an increasingly digital-first brand experience requires investment houses to not only stay ahead of design trends, but also implement them with skill to deliver an attractive visual identity to an audience seeking sleek, modern brands that thrive in online environments.

Brand power was one of the most critical factors that helped strengthen companies' competitive advantage during COVID-19. (McKinsey)<sup>2</sup>

## What to Look Forward to in this Paper

In this white paper, we provide insight from investment industry designers to help identify five key trends influencing financial services design, and the best practices for implementation. From branding and UX, to interactive website trends and custom imagery, we dive deep into strategies that will keep your brand fresh, professional and ahead of the pack.



# CREATING A UNIQUE LOGIC AND USER EXPERIENCE

User interface and user experience design (UI/UX) is the analysis and iteration of design elements that optimize the intuitive experience for your users, visitors and clientele. New UI/UX trends in the financial services industry continue to drive change and disrupt notions of what the sector should look and feel like. Intuitive websites provide a user experience that offers modern and additive functionality, all while informing visitors on core competencies in an intriguing way. By leveraging the latest UX trends and offering a more sophisticated, streamlined website, your firm will differentiate itself from peer groups.

With the design tools available today, there is ample opportunity to efficiently implement intriguing UX/UI design that elevate your firm's message and identity through an online experience. This can include guiding a user through the homepage with intuitive and interesting components, like an image carousel that spins when you hover, a video that starts when you scroll, or cursors that change when you hover on an element. These design elements add up to your users' experience, and show off your firm's personality, which will stay with them as arguably the most crucial component of their impression of your firm.

## STRATEGY 1 INCORPORATE MOVEMENT WITH CSS & ANIMATION

Motion draws the eye and engages the mind. This is where animation comes in. By offering animated elements users can interact with, you add valuable engagement for the user, which creates a compelling, memorable experience that sets your firm apart. Utilizing CSS (Cascading Style Sheets) animations within your site will captivate the user's senses, adding small pops of visual interest to basic components such as buttons, while offering further conceptualization and understanding to financial offerings.

CSS can be subtle—a small arrow directing you to the next section, hover animation, or a heading that glides in across the screen. CSS animations are conveniently applied to all similar elements, built into the code of the website and allow for pleasing interactivity, particularly in the form of user response with elements that can be shifted, rotated, and stretched on the page based on interaction.

## INTERACTIVE EXPERIENCES DEMAND MOTION

Changing the cursor into an arrow or creating a hover feature that displays images or shapes, increases usability and interactivity while also creating a unique navigation experience. Most financial services sites still rely on static pages with pre-loaded text, but especially for homepages that are meant to funnel a user into various parts of the site to learn more, this is no longer an adequate user experience. Interactive experiences demand motion, and when these snappy elements are implemented in a way that showcases firm personality ties into already established brand elements or tone of the site, they become not only eye-catching, but also a distinctly sophisticated way to communicate your services to potential clients.



## STRATEGY 2 INTUITIVE SCROLLING... WITH A TWIST

The site experience can be compared to a journey, but this is especially amplified in scenarios where the reins are handed over to the website to do some of the work on that journey. In some cases, the scroller we expect to take us up and down on a site, moves us in a new and surprising direction. Users need to enjoy the experience from introduction to call-to-action, and an oft-overlooked, yet critical aspect of that journey is the scroll. Intuitive scrolling, where animation is utilized during transitions, clicks or navigation, can make the difference between seeing a site as static and simple vs dynamic and multi-dimensional. This should be done elegantly and without going too far and loud.

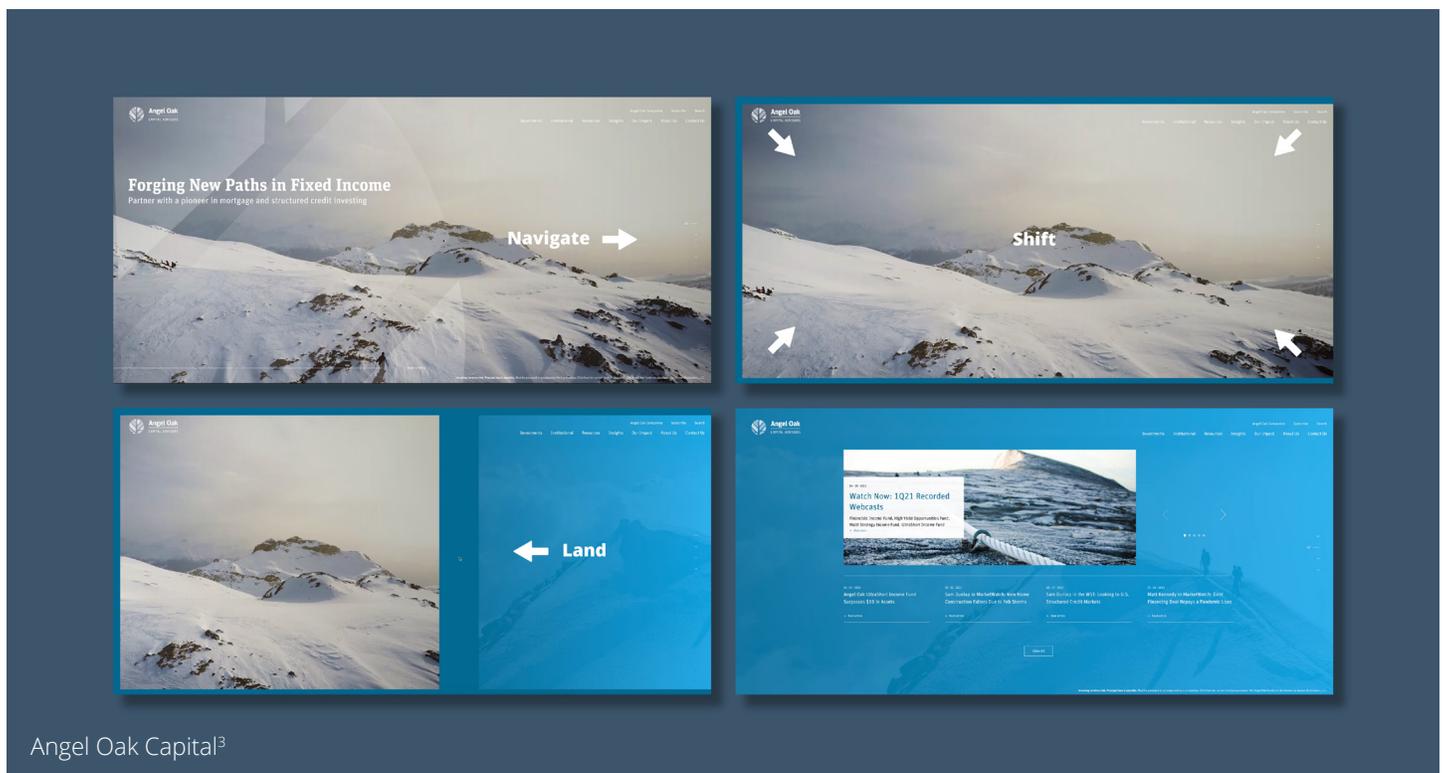
There are many ways to evolve the classic vertical scroll:

- Triggering a full-page transition animation when you scroll on a certain part of the page
- Zooming in when you scroll by incorporating the z-axis, which brings in the third dimension.
- Manipulating screen dimensions and changing the scroll direction to horizontal

Executing this subtle design element automatically engages your site's visitor by enticing and encouraging them to interact and educate themselves on your firm's content in a fun way. This increases their time on your website and helps them discover relevant content that they may have otherwise ignored.

Implementing alternative methods of vertical (or horizontal) scrolling and incorporating zoom throughout a website is not a predictable experience, but rather a memorable one that creates constant stimulation. These tools can provide better storytelling and significantly impact the user experience, and all while elevating your brand.

## ENHANCE ENGAGEMENT WITH AN UNEXPECTED VISUAL EXPERIENCE



Designers can incorporate a firm's focus on sophisticated strategies and unique opportunities with these sleek and interesting home page scrolls. The movement emphasized in the Angel Oak Capital site not only adds visual interest, but sets the tone for the overarching message the firm wants to send to the users. The result is the successful amplification of a sense of movement and unique perspective through page transitions and subtle cursor movements that enhance the focus of the firm's navigation and services, ultimately conveying a prolific nature and ability to see and understand things other firms cannot.

## STRATEGY 3 EXPOSING THE GRID

Like a Manhattan studio apartment with exposed brick as a design feature, there is a certain aesthetic attractiveness to showing the architecture behind the facade. When it comes to web design, your site's structure is the brick. It's the logic of how different pages are interlinked and their hierarchy, expressed in grids, columns and dividers that break up content into neatly laid out sections, it helps create 'visual rhythm' with similar spacing and sizing throughout the site.

Grids are the skeleton of web design. They help split pages horizontally and vertically, using rows and columns and serve as a systematic approach that allows designers to lay out elements in an organized manner. Good alignment, like much of design, should almost go unnoticed by your users; however more and more we're seeing designers show off the logic of grids on sites by incorporating them as outlines, helping create a sophisticated geometric feeling to the experience. Along with animations and intuitive scrolling, switching up the location of your website menu to the side, also increases usability and interactivity to a more user-friendly and unique navigation experience.

Along with animations and intuitive scrolling, switching up the location of your website menu to the side, also increases usability and interactivity to a more user-friendly and unique navigation experience

Your site's navigational structure plays a key role in how clients interact with and use your website. Without intuitive navigation for your menu, visitors may have trouble finding information or learning about your firm. No matter how simple or complex your site may be, all web content needs to be well arranged, giving them a full picture of the value of your services, showcasing and providing easy access to the most frequently demanded pages.

With grids, less is more, but exposing them is not only visually interesting, they also have the benefit of adding a layer of simplified navigation, assisting visitors in immediately identifying where they need to go and what they need to click, allowing them to digest information and move where they need to in a simple, logical manner to browse through your firm's content in a seamless way.

# EXPOSING THE GRID

**ALIGNMENT**

**HIERARCHY**

# TAKING IMAGERY TO THE NEXT LEVEL

Imagery can make or break a site experience. Visuals must resonate with your target audience while conveying how they relate to your firm's unique story. Up to this point, finance has been an industry reliant on stock photos to accomplish this goal. While stock imagery can be effective if you can find the right collection of photos (easier said than done), they do come with the potential drawback of seeming inauthentic, in addition to lacking the personalized appeal that organizations must cultivate to stand out.

This is where 3D imagery and custom illustrations come in. These options offer the ability to create an air of uniqueness and authenticity, and with improved technology and web design flexibility, both can be implemented more efficiently now than in years past. Dynamic features like these, that allow visitors to interpret and visualize your capabilities, are not only more engaging, they are much more likely to provide a memorable experience that sticks with users, while showcasing a deeper sense of vision and creativity needed to establish an effective leadership position.

“ In order to establish brand trust through visual storytelling; truth, tolerance, and transparency are key. It is important to remember the need to be inclusive in our visual choices, people want and expect imagery to be representative of themselves and the world they see around them.

- Kate Rourke Head of Creative Insights for APAC at Getty Images, from The Drum<sup>4</sup>

Simply put, imagery allows you to do more with less, and with the right approach, visual representation can truly set your brand apart. Since truth and transparency are crucial, you need to be looking for the essence of why your brand is different and harness imagery that can effectively set this tone while also helping tell your story.



## STRATEGY 4 DEPTH & DIMENSION THROUGH 3D IMAGERY



An image can transmit a message instantly, as the brain can interpret it faster than text, and gives depth and context to that message, providing a more immersive experience than written text alone.

More and more firms are utilizing 3D imagery to convey greater depths and dimensionality than their competitors. 3D elements in web design offer a tactile sense of realism while creating the feeling of physical presence and tangibility in a digital space. This can be a powerful experience for those used to viewing the online world from a 2D perspective.

### 3D IMAGERY CAN BE A POWERFUL EXPERIENCE FOR THOSE USED TO VIEWING THE ONLINE WORLD FROM A 2D PERSPECTIVE



Adding 3D design to traditionally flat imagery, such as performance charts, can also elevate user interest in your services while adding a sense of visual impact, which helps users retain information and improves chances of keeping your brand top of mind.

Even though 3D images are still a somewhat new UX design element, there are also opportunities to combine 3D imagery with interactivity, which only amplifies the experience by giving users the power to play with depth in a digital realm. Being able to spin a 3D globe, or manipulate a 3D chart may seem like bells & whistles, but they can go a long way in creating memorable experiences for potential clients seeking an innovative partner.

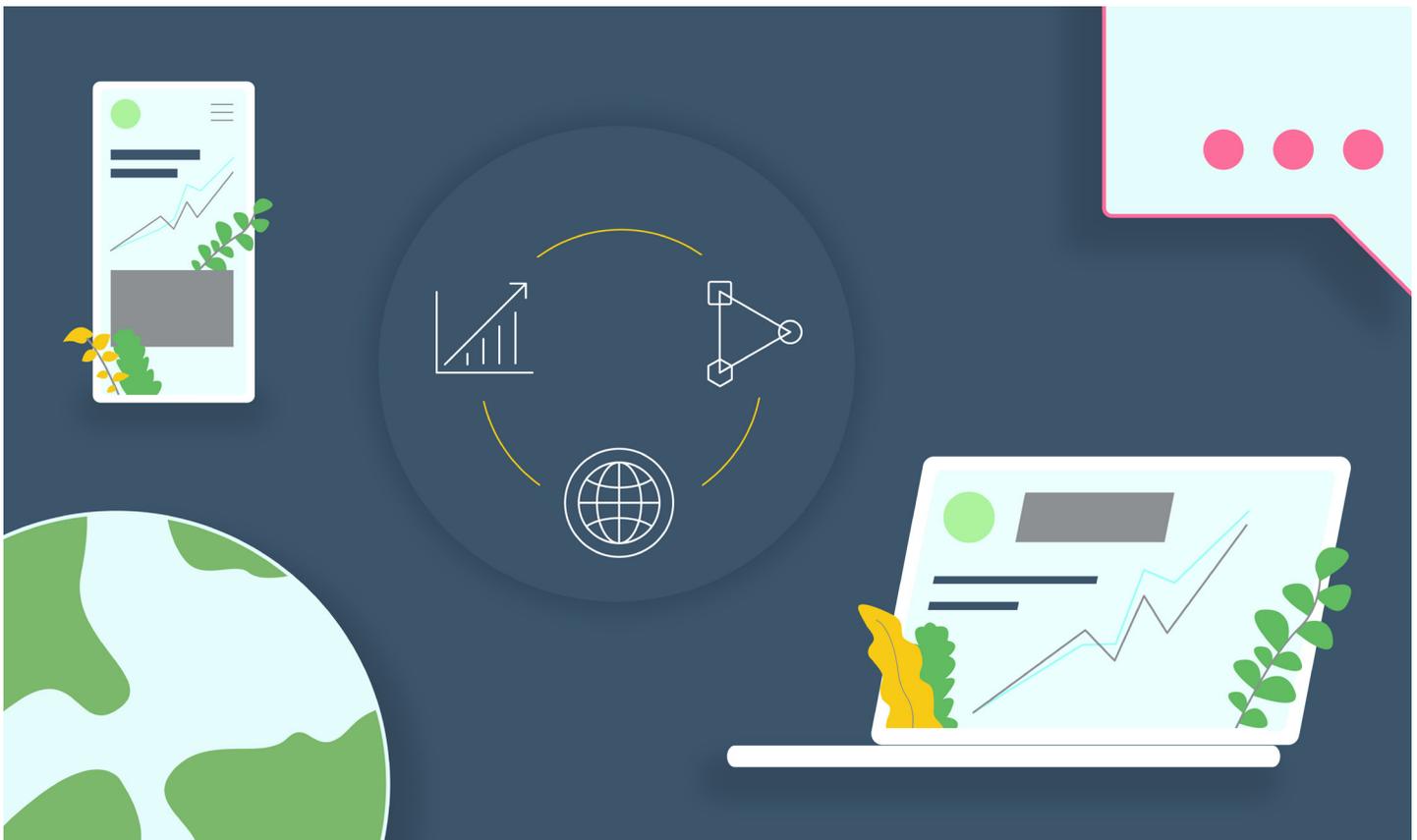
## STRATEGY 5 DRAW-IT-OUT WITH CUSTOM ILLUSTRATIONS

A design trend gaining more steam as an effective way to attract a wide range of clients is the use of illustration, a visual strategy that has proven helpful in onboarding, engaging visitors and differentiating product offerings. This is especially useful for brands where available photography is not able to articulate the true image of the firm.

Creating custom illustrations, can add a unique sense of personality that is often be lacking in the financial services space. This progressive style allows firms to play more with color and form, while incorporating the firm's identity in ways that can extend beyond the power of a single image.

The incorporation of illustrations is also surprisingly versatile. With a strong visual strategy in place, you can create imagery for both firm purposes and product offerings, with the ability to provide a cohesive identity across the site. This can also become a cost argument, as illustrations can be customized and utilized in different ways in multiple forms of collateral. There is a wide range of possibilities for illustrations in marketing material, social media and email content.

Illustrations can be both playful and professional, relatable to all demographics, and uncontroversial, allowing you to cast the widest possible net without removing the all-important sense of authenticity from the equation.



Since visual information is processed much faster than written text, illustrations can sum up intricate concepts into quick and precise snippets of storytelling, using metaphors, associations and visual anchors. (Zucker, Spivak<sup>6</sup>)

## Stay Ahead of the Pack

In our new digital-forward world, firms who proactively strengthen their brand persona through innovative design strategies will find themselves in a powerful position. Those willing to invest in a clear and consistent identity that engagingly conveys their value and services will attract audiences who seek sophisticated partners and enduring connections.

Now more than ever, implementing UX and UI design strategies are key in cultivating a lasting impression. From implementing subtle design features, such as hover animations, to aesthetic overhauls that humanize your content, like custom illustrations, you have a unique and timely opportunity to create an impactful online presence that will allow your brand to stay ahead of the competition.

**75%**  
OF PEOPLE FORM THEIR OPINION  
BASED ON WEBSITE AESTHETICS<sup>1</sup>

**40%**  
OF USERS WILL ABANDON THE WEBSITE  
IF IT SEEMS MESSY AND SHAGGY<sup>1</sup>

## How MBC Strategic Can Help

We are experts in strategic branding and messaging for the investment industry. With a 20-year history of investment branding, we have a unique perspective that ranges across asset classes, economic cycles and financial services categories.

Systematic in auditing current branding, comprehensive in competitive analysis, insightful in storytelling, and ahead of the curve in design aesthetics and web development, our firm provides complete, end-to-end marketing services that allow our clients to focus on their business. For two decades, we have helped firms build their identity, target the right audience, and effectively deliver their message. Serving clients from alternative investments to mutual funds, financial service providers and institutional investors.

**If you are a financial services firm and are considering a rebrand, MBC has the experience and insight to provide comprehensive strategic direction and unparalleled design leadership to raise you to the next level.**

<sup>1</sup>Lynkova, Darina. "31+ User Experience Stats 2021 [Everything You Need To Know]". [www.techjury.net](http://www.techjury.net). May 20, 2021.

<sup>2</sup>Diedrich, Dago. Northcote, Nicholas. Roder, Tido. Sauer-Sidor, Karolina. "Strategic resilience during COVID-19 crisis". [www.mckinsey.com](http://www.mckinsey.com). March 2, 2021.

<sup>3</sup>[www.angeloakcapital.com/](http://www.angeloakcapital.com/)

<sup>4</sup>Lim, Shawn. "Visual storytelling is still key in establishing brand trust". [www.thedrum.com](http://www.thedrum.com). August 24, 2020.

<sup>5</sup>[www.axiominvestors.com/](http://www.axiominvestors.com/)

<sup>6</sup>Zucker, Shay. Spivak, Eden. "UX Illustration Brings Together Content Visuals and Function". [www.wix.com](http://www.wix.com). May 2, 2019.