

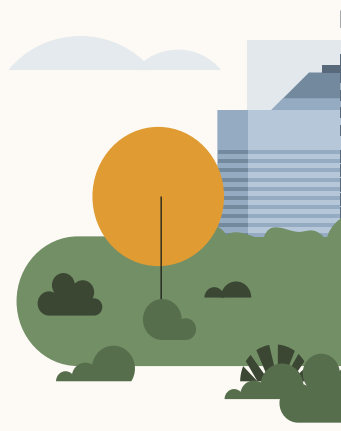
# Good advice makes a difference



In the summer of 2020, BNY Mellon Wealth Management launched a brand awareness, consumer-focused campaign aimed at highlighting the company's philosophy that "good advice makes a difference."

For BNY Mellon, wealth management isn't just about getting the highest returns on investments, it's a custom strategy for every client built around five essential wealth practices: invest, borrow, spend, manage and protect. Dubbed Active Wealth, the framework helps the company's clients navigate the unpredictable and unexpected.

Using LinkedIn's targeting tools, BNY Mellon Wealth Management sought to engage the niche audience of ultra-high-net-worth-individuals using a blend of creative content and strategic use of ad units.



## Targeting with precision: Acxiom and LinkedIn

Internal research showed that the UHNW (ultra-high net worth) audience were active on LinkedIn.

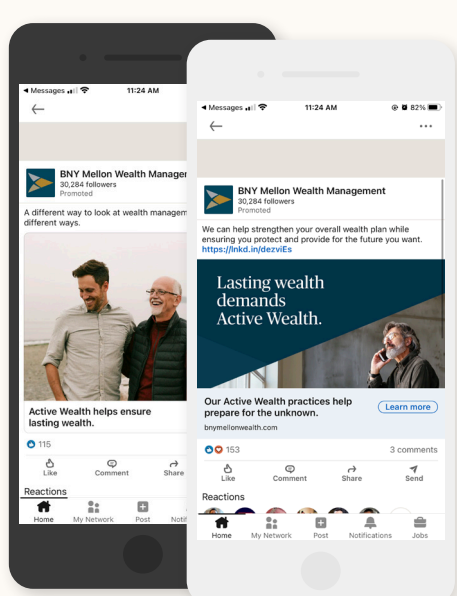
Allie Manning,  
Senior Social and Digital Marketing Manager at  
BNY Mellon Wealth Management

With certified LinkedIn marketing partner Acxiom, BNY Mellon Wealth Management was able to identify vital third-party insights about the target audience of individuals with investable assets of more than \$5 million.



## High-quality creative and a multi-format approach delivers strong performance

Drawing on existing thought leadership and new content, the BNY Mellon Wealth team created a dynamic editorial mix that led prospects to a landing page experience where the fundamentals of Active Wealth were outlined in greater detail, including quantification charts and thought leadership that allowed users to see how the principles of invest, borrow, spend, manage and protect could lead to protection of wealth over time.



## Vertical video drives engagement

BNY Mellon Wealth Management used a mix of ad units to engage its audience, including vertical video, which LinkedIn introduced in 2020.

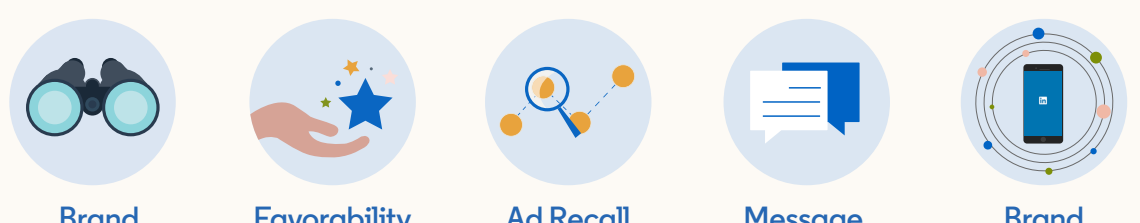
Capturing a user's attention is the biggest battle and our six-second, vertical videos on LinkedIn were brief and visually pleasing, helping to achieve that attention goal.

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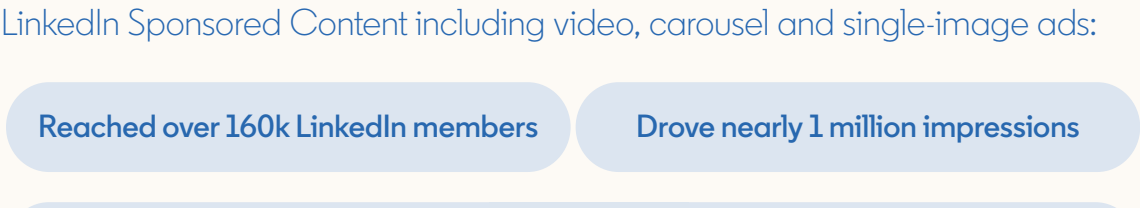
## Measuring the campaign beyond views and clicks

LinkedIn's Advertising Effectiveness (AdEfx) measurement solution enables marketers to go deeper than vanity metrics and understand in real-time how campaigns are affecting:



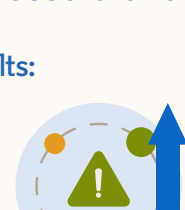
AdEfx is able to do this by collecting weekly, off-platform data on customized measurement metrics. By ensuring accurate data that provides powerful insights, and allowing marketers to maximize their ROI and measure performance, AdEfx helps to improve the impact of each campaign.

BNY Mellon Wealth Management's campaign focused on leveraging a mix of LinkedIn Sponsored Content including video, carousel and single-image ads:

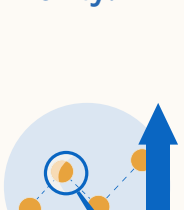


Insights from AdEfx also showed the deeper effects of the campaign - **increased brand recall and familiarity:**

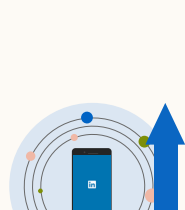
Results:



increase in brand familiarity



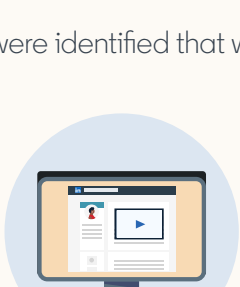
increase in ad recall



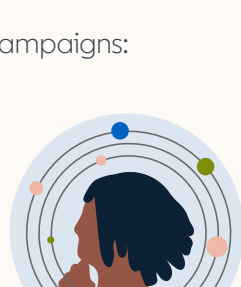
increase in brand consideration

## Key insights lead to a successful campaign

Two learnings were identified that will inform strategy for future campaigns:



Video ads drove 4x the engagement compared to sponsored content, while single image ads drove higher average frequency

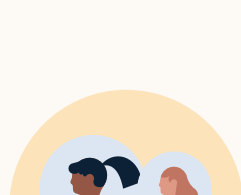


The increase in familiarity and ad recall can be attributed to increased exposure (frequency)

## Key learnings for brand campaigns

### Go where your audience is:

LinkedIn members are more likely to own investments or be in-market for investments and savings products. For BNY Mellon Wealth Management, this audience insight made LinkedIn a powerful choice for their campaign.



### Diversify your content:

BNY Mellon Wealth Management activated a broad range of ad units, which gave consumers varied ways to engage with the campaign.



### Define success:

By clearly defining familiarity, ad recall, and consideration as key success metrics at the project's outset, the team was able to optimize towards better results throughout the campaign.



Thanks to precise audience targeting, engaging creative and insights from marketing partner Acxiom and AdEfx, BNY Mellon Wealth Management was able to increase brand awareness among receptive high-net-worth consumers.

## Conclusion

Learn more about how LinkedIn and our marketing partners can help you engage with consumers looking to invest in financial services products.



<sup>1</sup>Forrester, 2020  
<sup>2</sup>Interpret, 2020  
<sup>3</sup>Business Insider, 2020