

Data Analysis

Team Crawford

Lauren Buie, Ava Glassen, Marisa Gu,
Shahla Le, & Deborah Yoon

Data Analysis



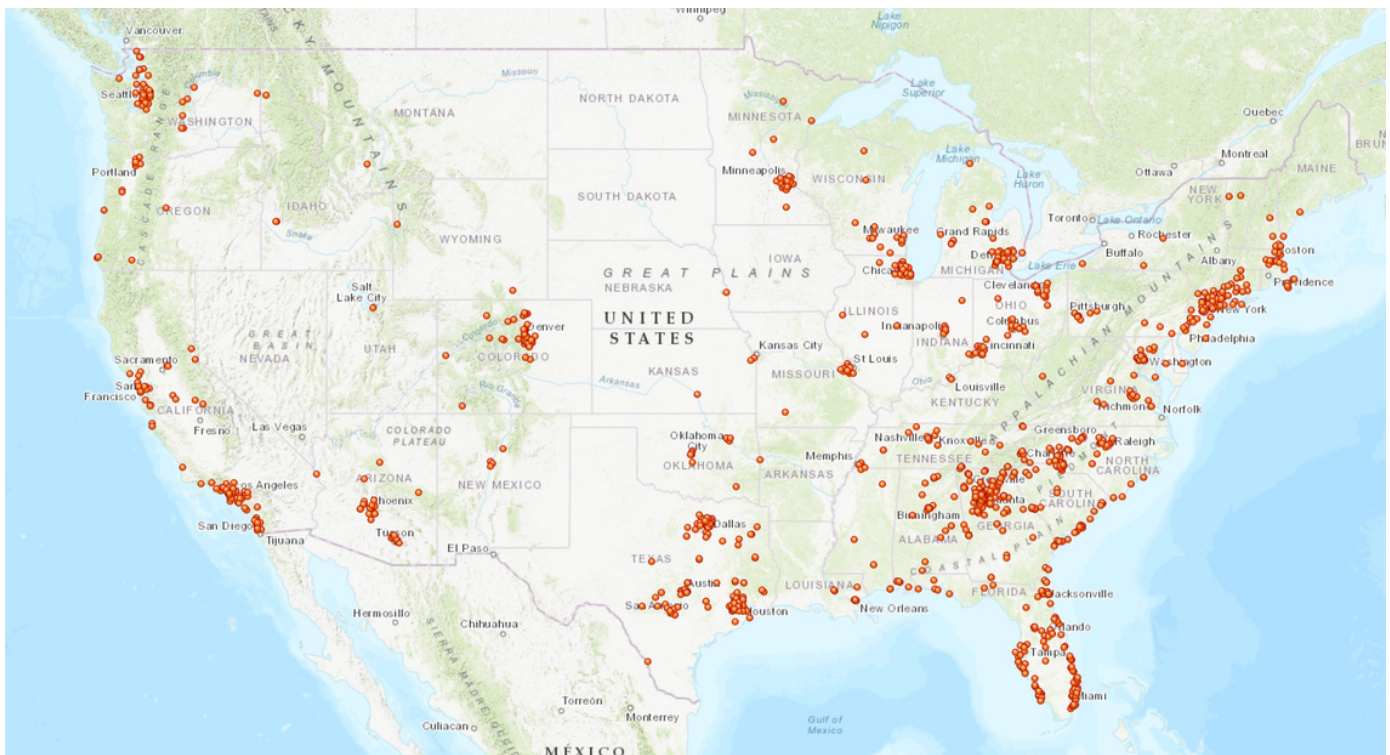
Data Analysis

Geographic Mapping
HubSpot Analysis

Data Analysis

Geographic Mapping

With provided demographic data about Crawford's clients, we were able to map out individual investors' locations. Using ArcGIS, over 900 clients' zip codes were inputted and mapped within the program. Each pin on the map represents the location of one of Crawford's clients. Analysis of the geographic data can reveal information about locations where most Crawford clients primarily reside and offer opportunities for expansion. We researched the wealthiest cities in the US and compared them to the locations of Crawford's current client base. Fortunately, Crawford has a presence in all of the top 10 wealthiest US cities. We noticed that four of these top 10 wealthiest cities have a relatively low number of Crawford clients: Washington, D.C., Boston, MA, Princeton/Trenton, NJ, and San Jose, CA. There is an opportunity to expand in these cities as they contain ideal targets. Future marketing and communication strategies can be targeted in these cities to attract potential clients from our target audience.



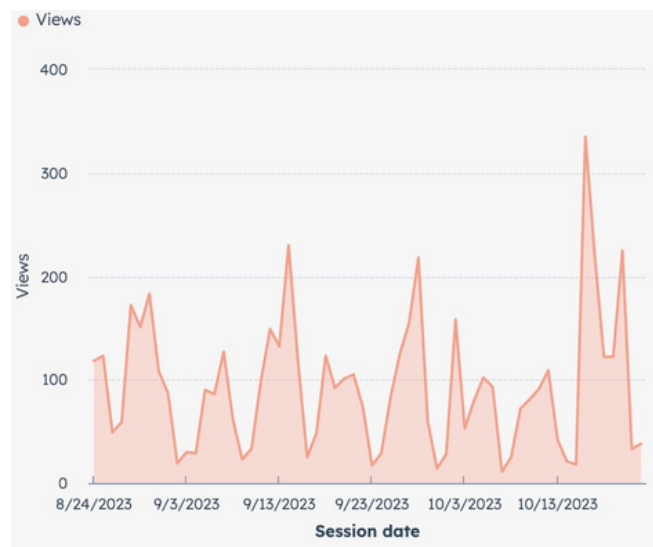
10 Wealthiest US Cities	Crawford has Presence (Y/N)
Washington, D.C.	Y (4)
Boulder, C.O.	Y (10+)
NYC/Newark/Jersey City	Y (10+)
Bridgeport/Nowark, C.T.	Y (5)
Boston/Cambridge, M.A.	Y (3)
Trenton/Princeton, NJ	Y (3)
Seattle/Tacoma, WA	Y (10+)
San Fran/Berkeley, CA	Y (10+)
San Jose, CA	Y (3)

Data Analysis

HubSpot Analysis

Visitor Activities

We were given access to HubSpot to analyze data from the backend of the website and to make recommendations based on our analysis. We looked at several key metrics on HubSpot to help inform our suggestions. First, we looked at landing page visits. The Individual Investors homepage is viewed most frequently by website users. This means that our website redesign will be put to good use on a page that sees many visitors. Other popular pages are the Investment Philosophy page and the Our Team page. We also analyzed the average time spent on each webpage. Overwhelmingly, the Our Team page, which introduces all members of the Crawford team, averaged the highest time spent by users. This indicates that users are interested in learning more about the people who will be managing their portfolios. Crawford can continue to set itself apart by emphasizing its personal relationships. We also noted that Disclosures and A Message from the Founder had the lowest average time spent at 3 minutes. Lastly, we analyzed the time of day/week/month that users were accessing Crawford's website. Overall, the site sees more visitors at the close of each fiscal quarter. We can infer that people are looking ahead to the next quarter and may be looking for financial improvement opportunities and support as they analyze their earnings from the previous quarter. The website also sees more viewers towards the beginning of each week, as shown in the graph. Viewership trails off toward Fridays and picks back up again on Mondays as potential clients gear up for the week and consider finding financial support as a client.



Pages

We also analyzed pages on Crawford's website to gain insight into content topics. The most popular topics are educational blog posts discussing dividend stocks. Second to those are unique articles that describe the Crawford strategy in depth. It is also important to note that the most popular articles were written by Crawford's founder, John Crawford, III. We also analyzed a correlation between market conditions and website visitors. On several occasions when the stock market saw a drop, such as in September 2022, the Crawford website had a spike of approximately 300 visitors. This shows that as the stock market experiences volatility, people begin looking for opportunities to educate themselves about Crawford and its services.

Marketing Strategy

Team Crawford

Lauren Buie, Ava Glassen, Marisa Gu,
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Marketing Strategy



Marketing Strategy

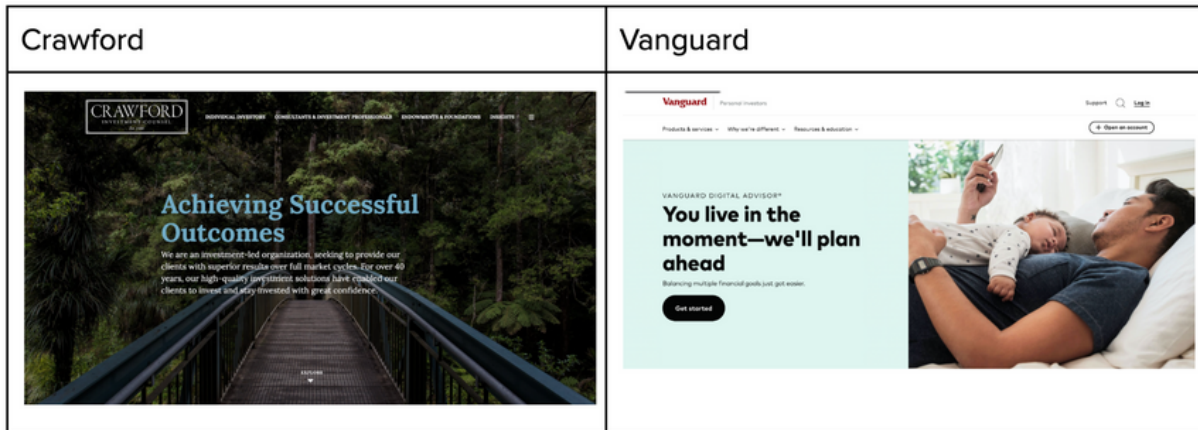
Best Practices
ALMNAC Framework
Perpetual Accumulation

Marketing Strategy

Best Practices

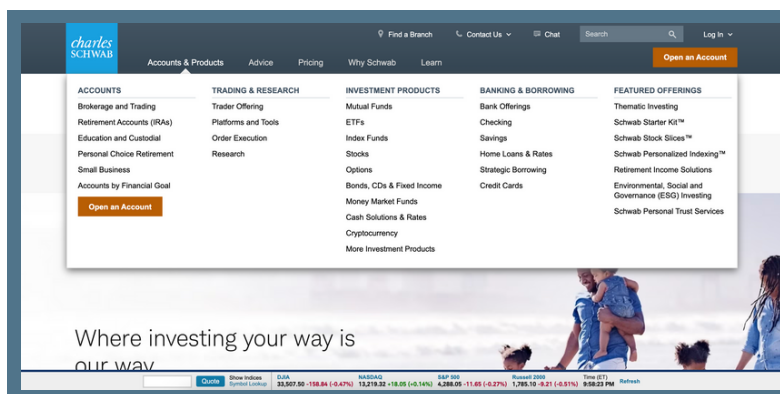
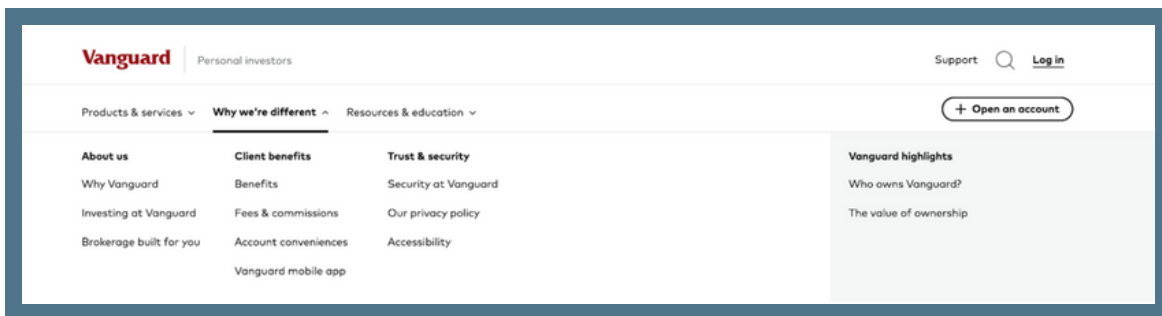
1 Landing Page

Crawford's competitors include a more personal photo when you first click on the website. This helps to draw users in and relate to the content they are about to consume. The landing page also features a catchy tagline that involves the potential client. Including phrasing such as "you" and "us" adds humanity to the company.



2 Navigation Bar

We enjoyed the three sections separating About Us, Client Benefits, and Trust & Security that Vanguard and Charles Schwab use. Since Crawford repeats a lot of the information for their three client pools, they could do something similar to this navigation bar shown below. In general, it's good practice to create a well-organized and easily accessible navigation bar.

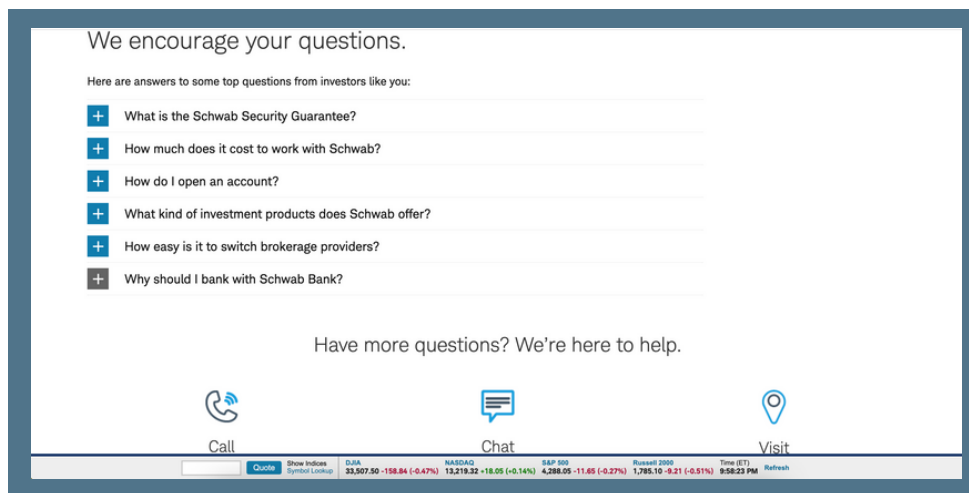


Marketing Strategy

3

FAQ Page

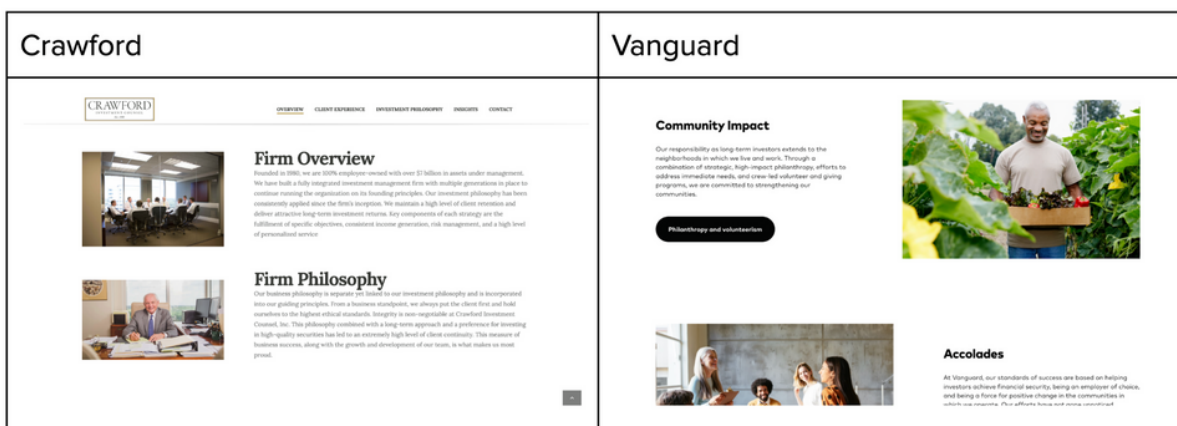
A FAQ page is missing from Crawford's website and we believe it would help clients to identify if they meet the minimum requirements and why they should choose Crawford. It could also be a resource to answer commonly asked questions that may come up when searching for an investment firm.



4


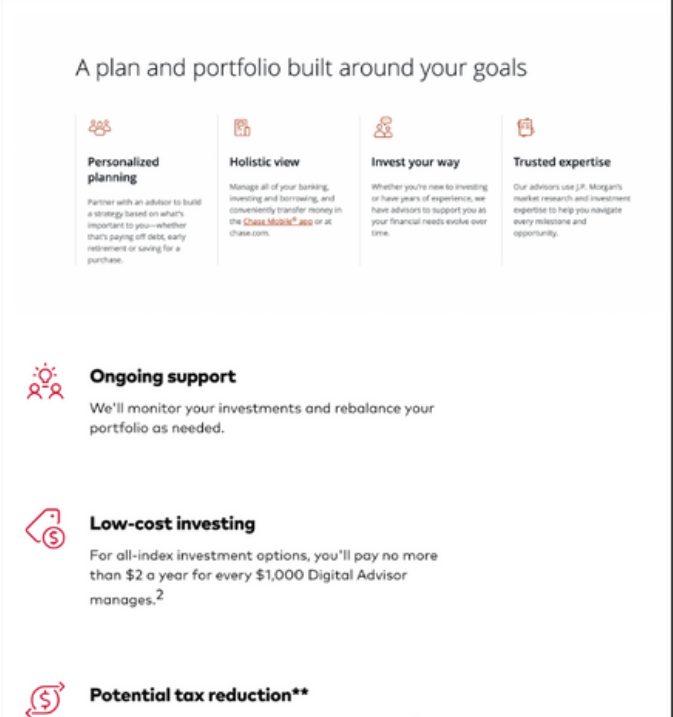
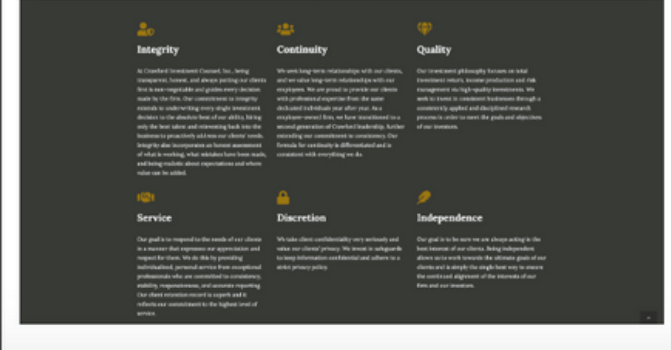
Firm Overview

We recommend simplifying text and inserting more relatable images. This page is an opportunity to win over clients so we believe it should be where most of the compelling content is. Engaging fonts, icons, and smaller text blurbs could be beneficial in these areas.



5 Visuals

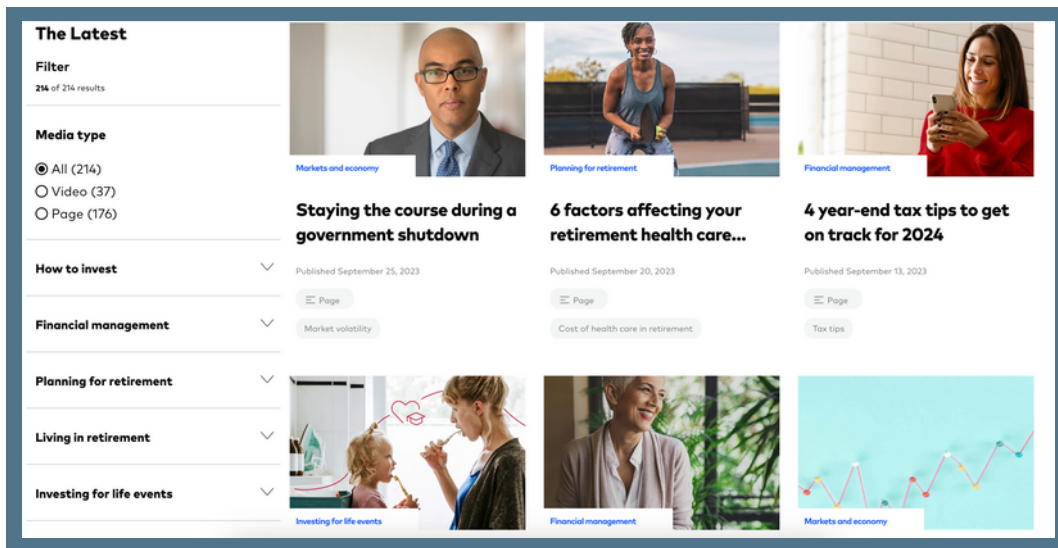
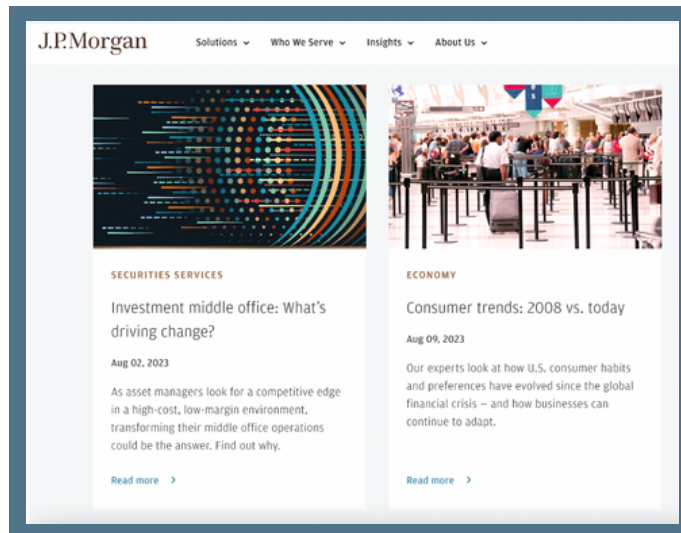
Again, icons are great, but there is too much text. Crawford's informational pages hardly have any visuals and the long paragraphs appear overwhelming at first glance. Breaking up large text sections with icons and imagery could help make the website more visually appealing and easier to read overall.

Crawford	Vanguard
 <p>Time-Tested, Consistently-Applied Investment Philosophy</p> <p>Crawford was founded on the trust of a single non-profit client with a mission for both growth and income. Over 40 years, we have maintained the belief that meeting high-quality, income-producing securities gives endowments and foundations the greatest chance of success.</p> <p>Investing for the Greatest Chances of Success</p> <p>We Call It a Common-Sense Approach to Investment Management</p> <ul style="list-style-type: none">Investing in individual high-quality, income-producing securities ensures the range of potential investment outcomes.This in turn mitigates the likelihood of premature loss of capital and reduces the pattern of returns.Consolidating assets under our management enables a single, transparent layer of fees. <p>Steady Income + Upside Growth + Downside Protection = Successful Outcomes</p> <p>Contributors to Your Organization's Success</p> <ul style="list-style-type: none">Confidence in meeting high-quality, individual securities.Enjoying the benefits of income and growth of income with a high level of risk management.	 <p>A plan and portfolio built around your goals</p> <ul style="list-style-type: none">Personalized planning Partner with an advisor to build a strategy based on what's important to you—whether that's paying off debt, early retirement or saving for a purchase.Holistic view Manage all of your banking, investing and borrowing, and conveniently transfer money in the Chase Mobile app or at chase.com.Invest your way Whether you're new to investing or have years of experience, we have advisors to support you as your financial needs evolve over time.Trusted expertise Our advisors use J.P. Morgan's market research and investment expertise to help you navigate every milestone and opportunity. <p>Ongoing support We'll monitor your investments and rebalance your portfolio as needed.</p> <p>Low-cost investing For all-index investment options, you'll pay no more than \$2 a year for every \$1,000 Digital Advisor manages.²</p> <p>Potential tax reduction** Take advantage of our free tax-loss harvesting service to help reduce your tax bill and keep more of your returns.</p>
 <p>Integrity At Crawford Investment Counsel, Inc., being independent, honest, and always putting our clients first is a non-negotiable and guiding moral compass. From the first, our commitment to integrity means we conduct every single investment decision to the absolute best of our ability, bringing the most value and increasing both the likelihood of profitability and the client's wealth, through the due diligence and honest assessment of what is being bought. What makes us here today, and being visible about expectations and where we see the world.</p> <p>Continuity We seek long-term relationships with our clients, and we will bring you solutions to solve your problems. We will go to great lengths to ensure your investment performance is supported from the same dedicated individuals you have chosen. Our employees invest first, we have implemented a sound governance of conduct and ethics. Further, regarding our commitment to continuity, the formula for continuity is professional and a consistent work environment for all.</p> <p>Quality Our investment philosophy focuses on total investment return. Beyond performance and risk management, we seek to ensure our clients' best interests are served. Through a commitment to quality and the highest standards of practice in order to meet the goals and objectives of our investors.</p> <p>Service The goal is to respond to the needs of our clients in a manner that respects our appreciation and respect for them. We do this by providing individualized, personal service from exceptional professionals who are committed to competence, integrity, responsiveness, and consistent reporting that allows investors to rest easy and which reflects our commitment to the highest level of service.</p> <p>Discretion We take client confidentiality very seriously and value our clients' privacy. We strive to safeguard sensitive information confidential and adhere to a strict privacy policy.</p> <p>Independence The goal is to serve our clients well in the best interest of our clients. Being independent allows us to work towards the ultimate goal of our clients and to bring the single best way to ensure the consistent alignment of the interests of our firm and our investors.</p>	

Marketing Strategy

6 Content Filtering

We believe that the content filtering system could be redesigned to help users as they navigate the website's contents. Even if the template does not allow for filtering, you could add something to the image to easily identify the insight. Also, including a blurb that summarizes the article below the title will help readers preview content and could help to increase engagement on the Insights tab.



7 History/Culture Page

Adding a timeline to show Crawford Investment Counsel's history and how far the company has come would be beneficial for the brand and for potential clients to see what the firm has accomplished. This page could also be a way to outline achievements and awards won over the years. It could also be an opportunity to emphasize the family-owned values that Crawford is so proud of.

Marketing Strategy

ALMNAC Framework

Ads (Traffic) → Landing Page → Magnet (Guide) → Nurture → Appointment = Client

Recap of ALMNAC

ALMNAC is an advertising strategy used by Fisher Investments, one of Crawford's competitors, to attract new clients. This approach involves creating ads to generate traffic to a landing page featuring downloadable guides acting as a magnet. Prospects are then nurtured, which ultimately leads to a consultation appointment, thus converting the prospect into a client. The goal is to sell the value of a low commitment next step rather than their services straight away.

How can Crawford implement ALMNAC?

Crawford can utilize this advertising strategy to attract prospective clients by promoting their podcasts/perspectives, presenting them as an insightful resource that aids potential clients in achieving their income needs and long-term growth goals.

The ads can be placed on webpages specifically targeted for their client demographic (e.g., Fox News, Forbes, WSJ, MarketWatch). The design should feature a benefit/problem-oriented headline, a concise explanation, and a clear call to action. Furthermore, the ad must utilize benefit-oriented language, such as "free guide," incorporate social proof, e.g., "over 1.3 million viewers," and emphasize the potential value, such as "from a \$7.5 billion investment management firm's perspective."

Crawford would then be able to identify prospective client needs by analyzing the type of ad they clicked on. For instance, the perspective titled "[How's My Portfolio Doing?](#)" suggests the client's concern about their long-term portfolio value.

Once the client clicks on the ad, the link will take them to a landing page where they can access the content in exchange for their phone number and email address. Additionally, a pop-up could ask a quick survey question to help the client self-qualify for Crawford's services, thus reducing time spent with non-qualified prospects.

If Crawford determines the client as a qualified prospect, they can use follow-up methods, such as phone calls or emails, to provide information about the services offered, such as portfolio reviews and financial planning. These initiatives can help contribute to a positive impression of Crawford as a reputable firm.

Marketing Strategy

Perpetual Accumulation Registered Trademark

Benefits of a Registered Trademark

Since the Perpetual Accumulation™ approach was formulated by Crawford's proprietary in-house research, registering a trademark will reaffirm Crawford as an expert in the field.

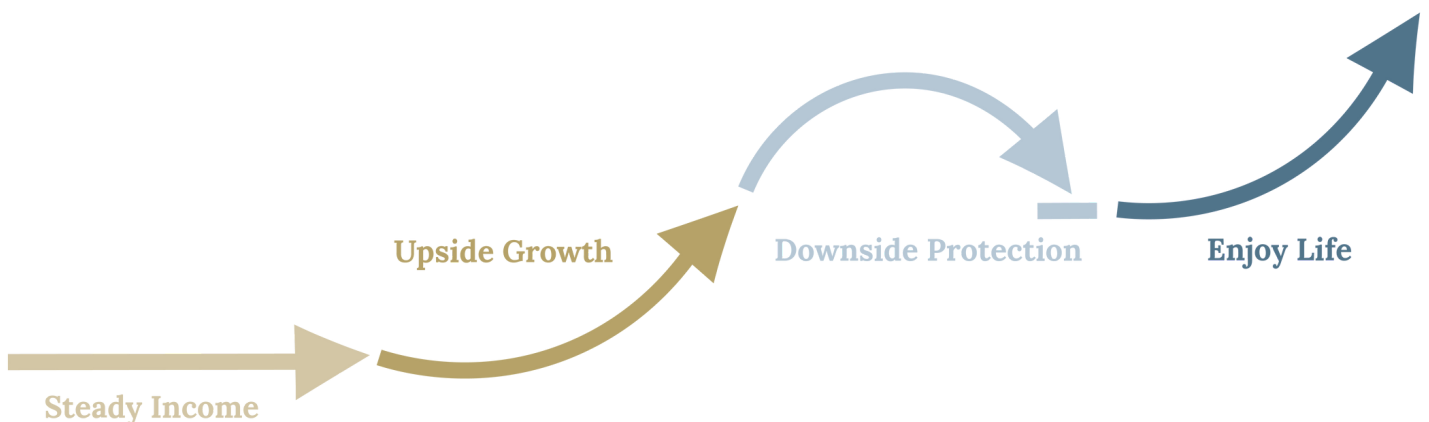
Redesigned Perpetual Accumulation Graphic

The new graphic includes Crawford's brand colors and simplifies the text to easily convey the message of creating lasting wealth through Crawford's unique investment strategy.

Original Perpetual Accumulation Graphic



Redesigned Perpetual Accumulation Graphic



Website Redesign

Team Crawford

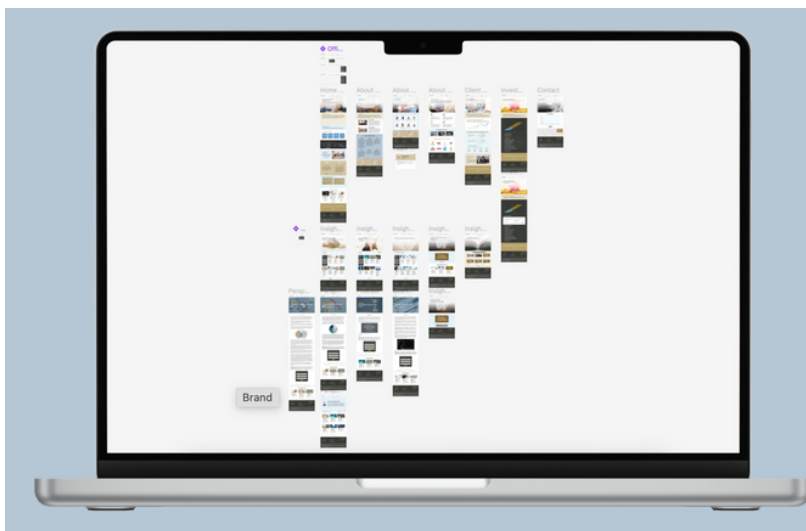
Lauren Buie, Ava Glassen, Marisa Gu,
Shahla Le, & Deborah Yoon

Website Redesign

The website was identified as a channel for Crawford's communication strategy. The main purpose of the website is to inform and engage clients. Current Crawford clients should easily access information on the website and conveniently share content with others. Tying back to our goal of helping Crawford attract the next 100 high-net-worth individuals, the website should also serve as a platform to connect with prospective clients. They should be able to find information to help them choose an investment firm and browse through website content that is engaging and credible.

We started by conducting a website audit of every page on the Individual Investor's side of Crawford's website. Team members noted areas where user experience could be improved. Additionally, we looked at other investment firms' websites for inspiration. Several successful website elements were noted for incorporation in our proposed website redesign.

Based on our audit and inspiration, we built a low-fidelity wireframe and a high-fidelity prototype of a redesigned website on Figma. To address the main goal of improving the communication strategy on the website, we mainly focused on bettering user experience for the website user, modernizing the visual look of the website, and adding easily accessible information.



Website Redesign Wireframe



Website Redesign Prototype

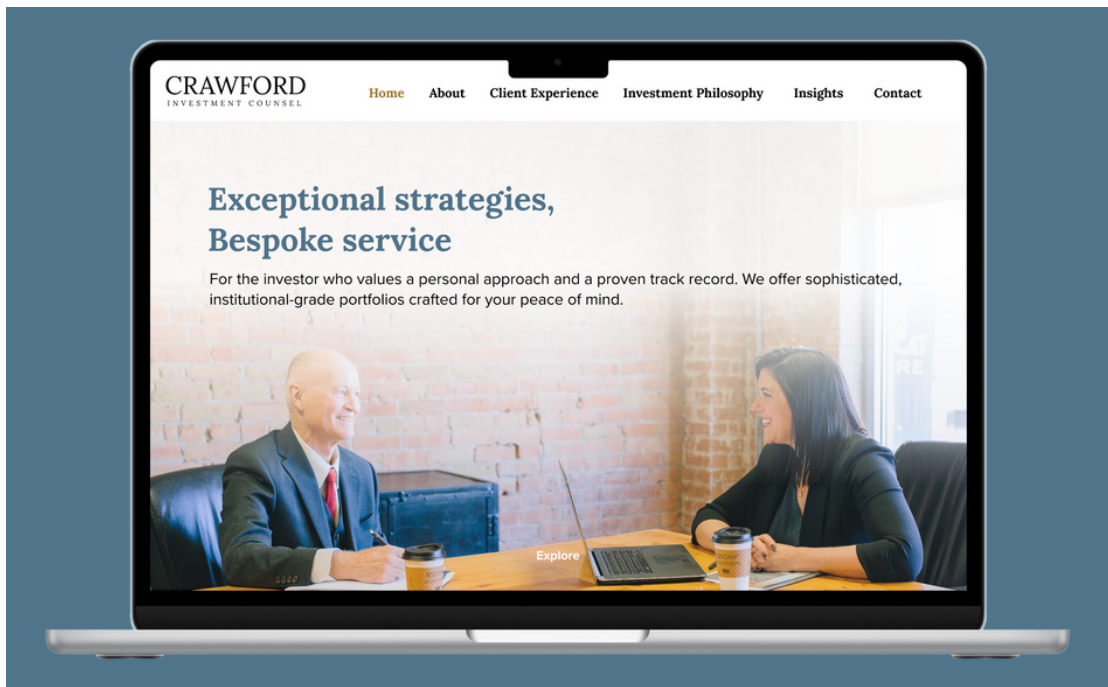


CRAWFORD
INVESTMENT COUNSEL

Website Redesign - Home Page

1 Combining Navigation Bars

There is a new navigation bar that combines the existing two (Individual Investors and Insights). Our new logo is in the corner, the tab names are not all capitalized, the color of the tab the user is on changes, and there is no extra navigation bar on the right side.



Website Redesign - Home Page

2

Perpetual Accumulation™ Motion Graphic

As we continued down the home page, we replaced the section featuring a downloadable guide. Instead, two sections now feature a newly designed dynamic Perpetual Accumulation™ graphic and a concise summary of what sets Crawford apart.

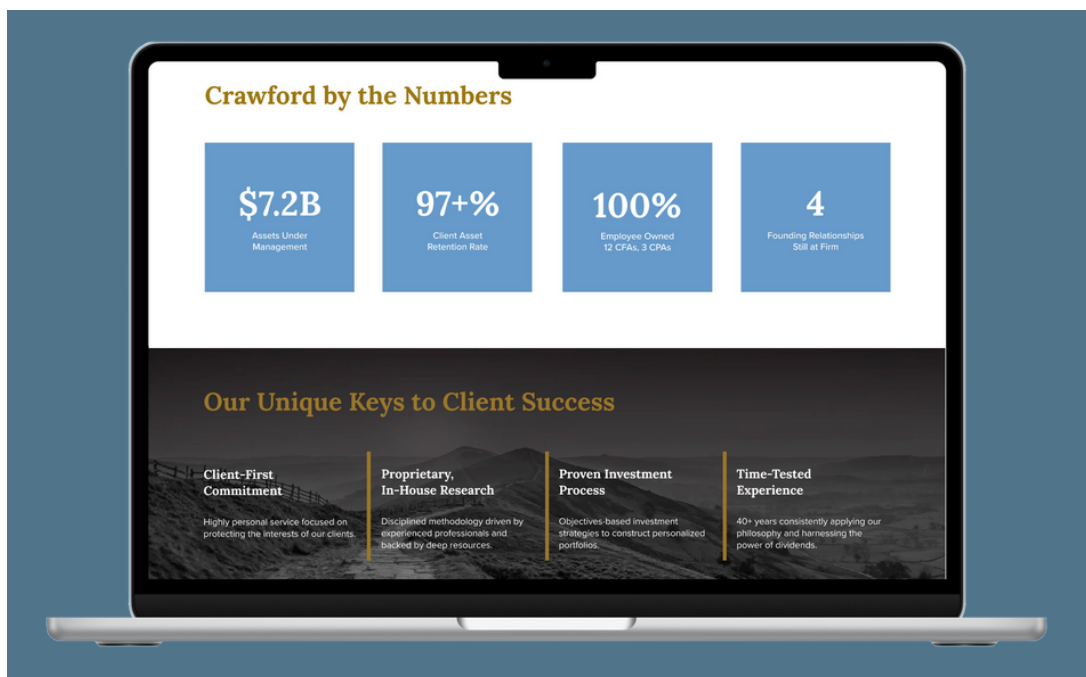


Website Redesign - Home Page

3 Concise Language and Font Adjustments

We rearranged the numbers in the “Crawford by the Numbers” section.

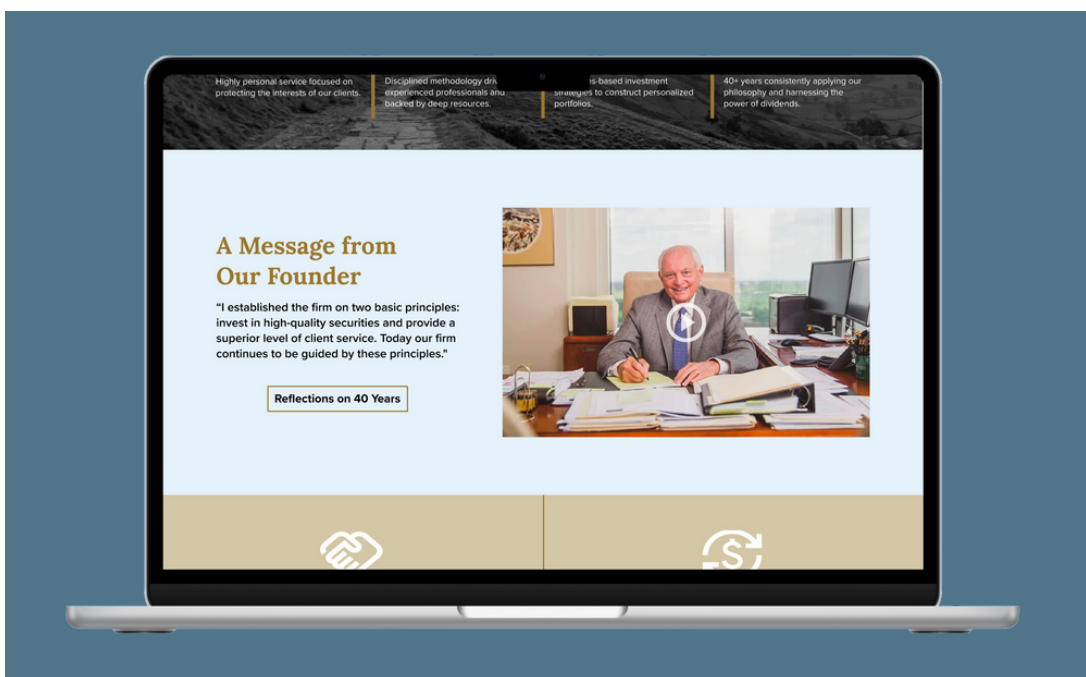
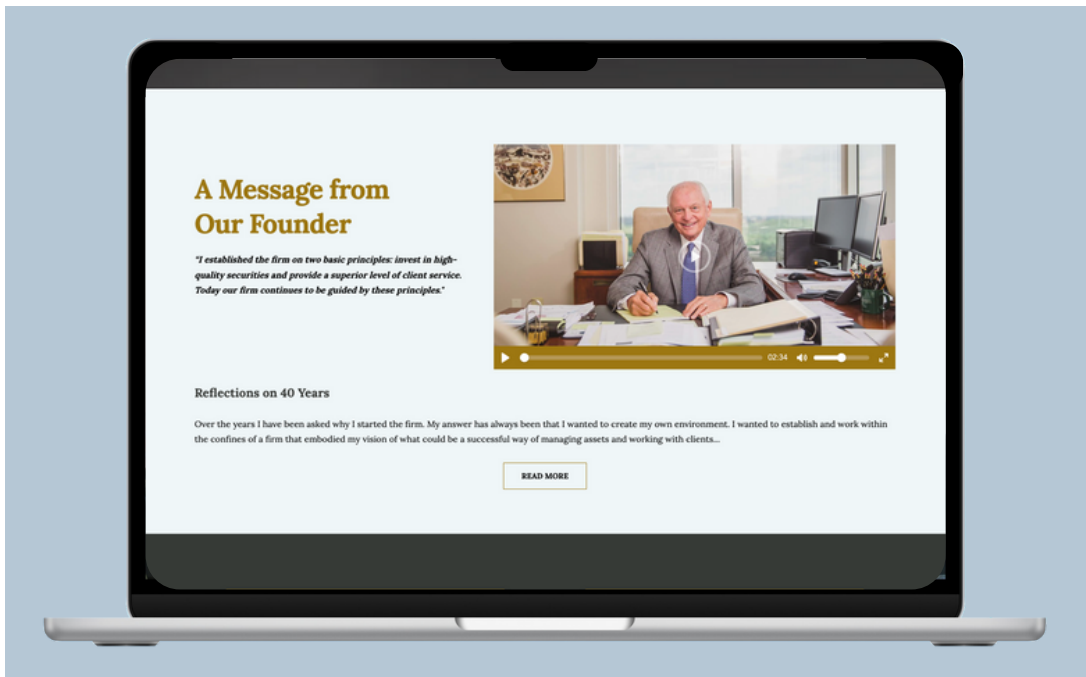
We made the language more concise by taking out “Since 1980:” and made the font more consistent by changing the body copy to Proxima Nova.



Website Redesign - Home Page

4 Concise Language and Font Adjustments

In “A Message from Our Founder”, we made the font more consistent by changing the body copy to Proxima Nova. We simplified the extra copy into a button to declutter the smaller section.

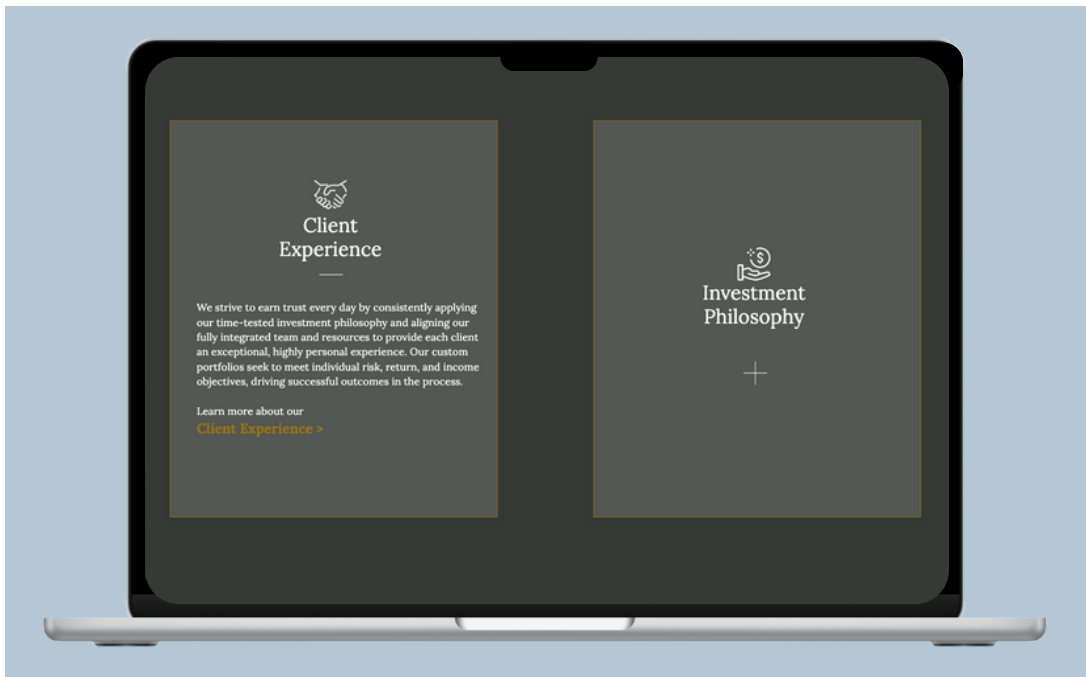


Website Redesign - Home Page

5

Accessible Information

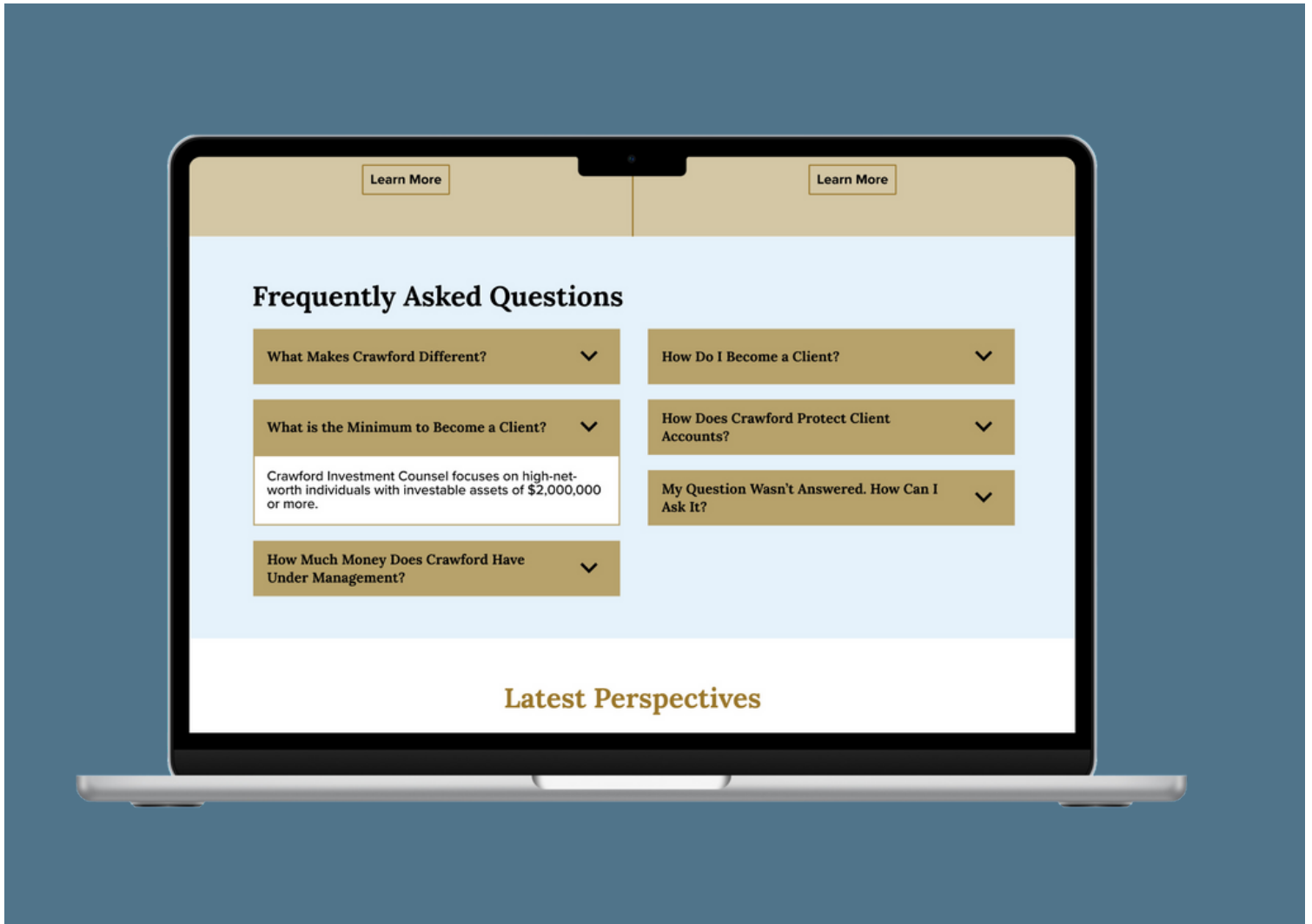
This section's colors were changed and the text is readily available to read instead of making the user click on boxes to access the information. The color of the section was also changed to bring a lighter look to the website.



Website Redesign - Home Page

6 FAQ

We added a FAQ section for users to get the information they are most interested in at a glance.

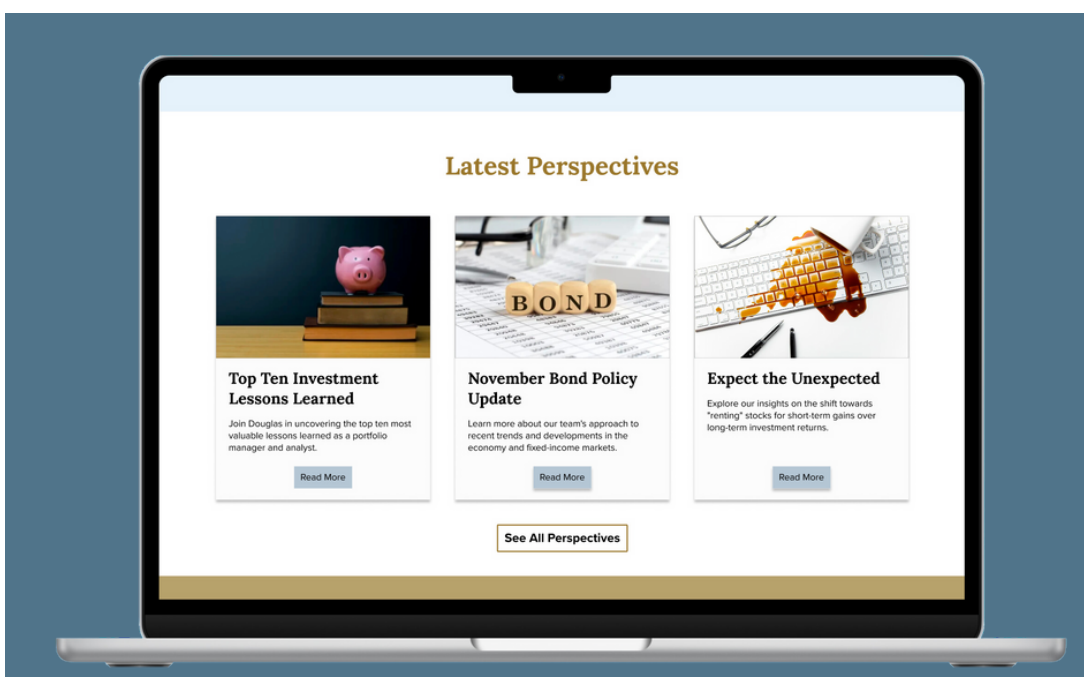
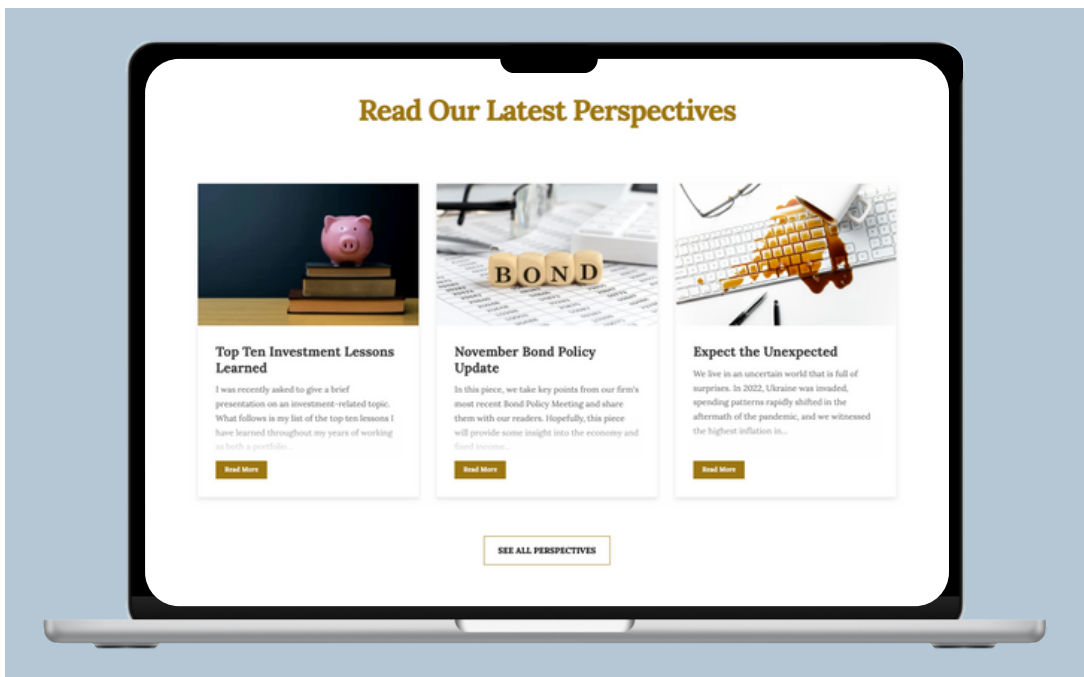


Website Redesign - Home Page

7

Perspectives at a Glance

Instead of the beginning of the Perspectives post blurring, we recommend adding a short blurb summarizing the content for readers to easily digest and preview. The button color was also changed and centered to stand out more.

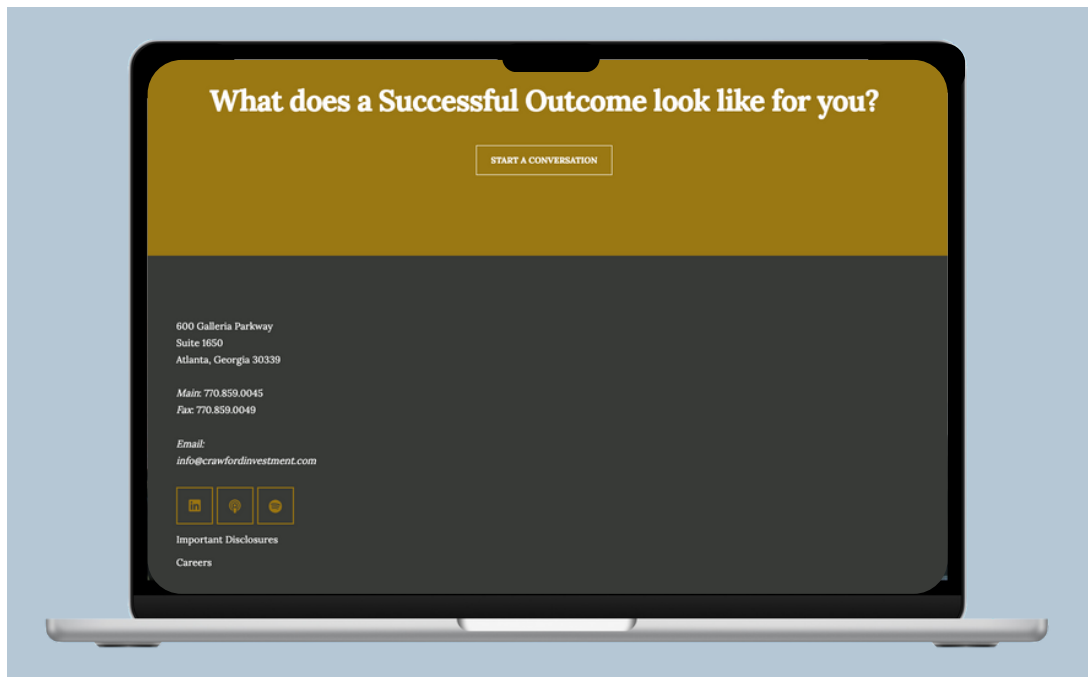


Website Redesign - Home Page

8

Call to Action

The copy was changed for a clearer CTA, and the footer was reorganized and condensed into three different columns with additional icons added for increased accessibility and aesthetics. The color of the CTA section was also changed.

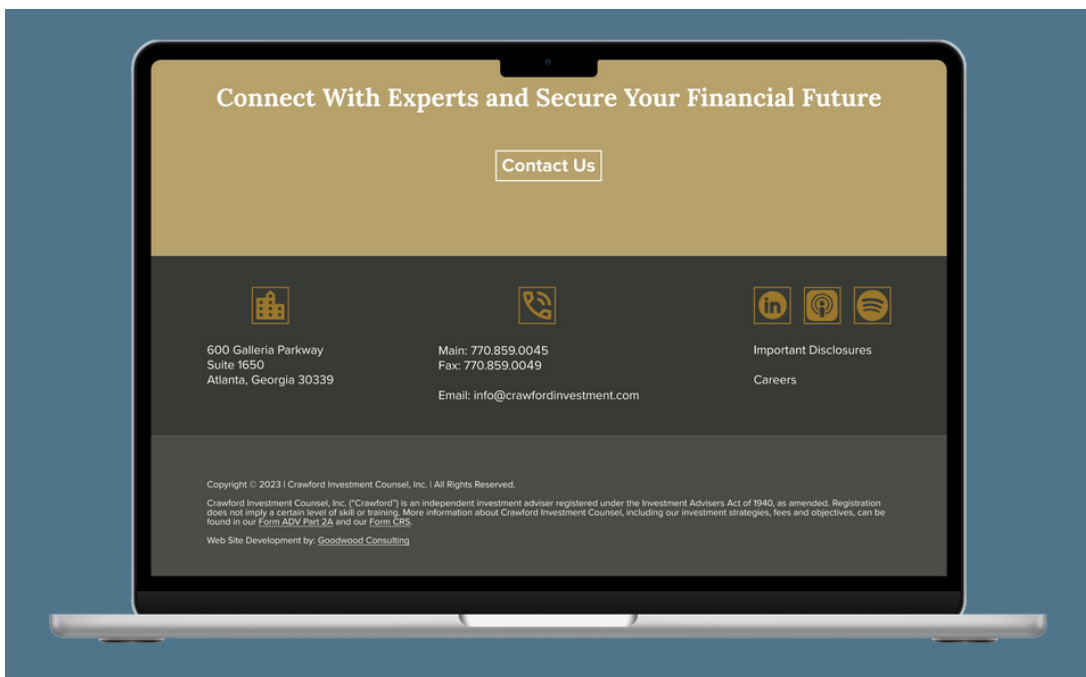
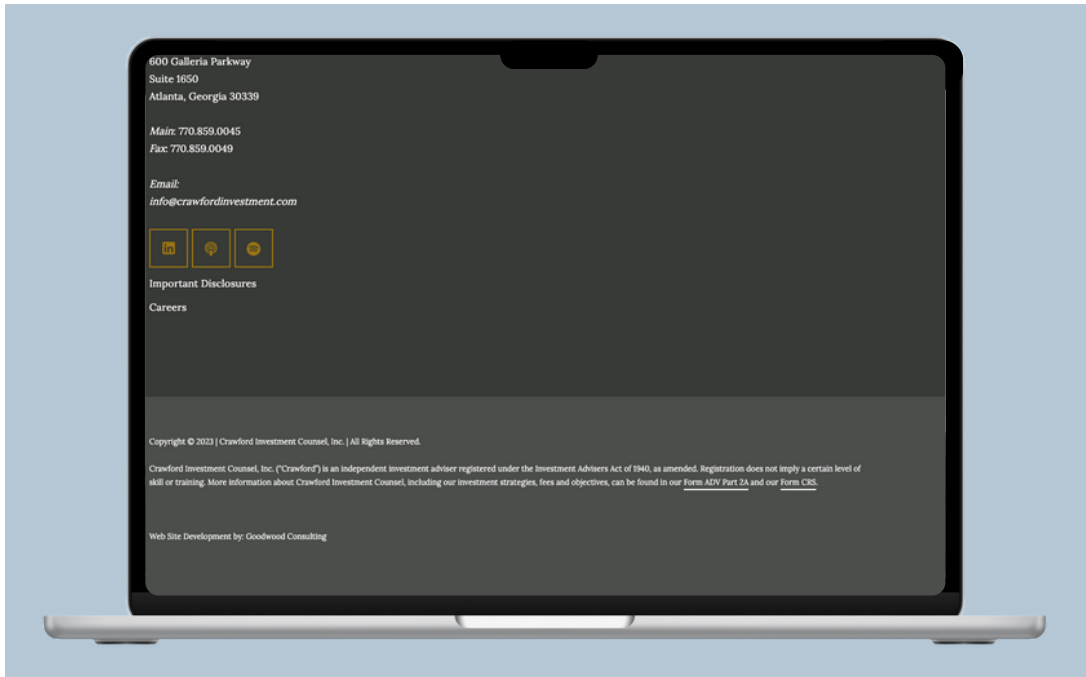


Website Redesign - Home Page

9

Footer

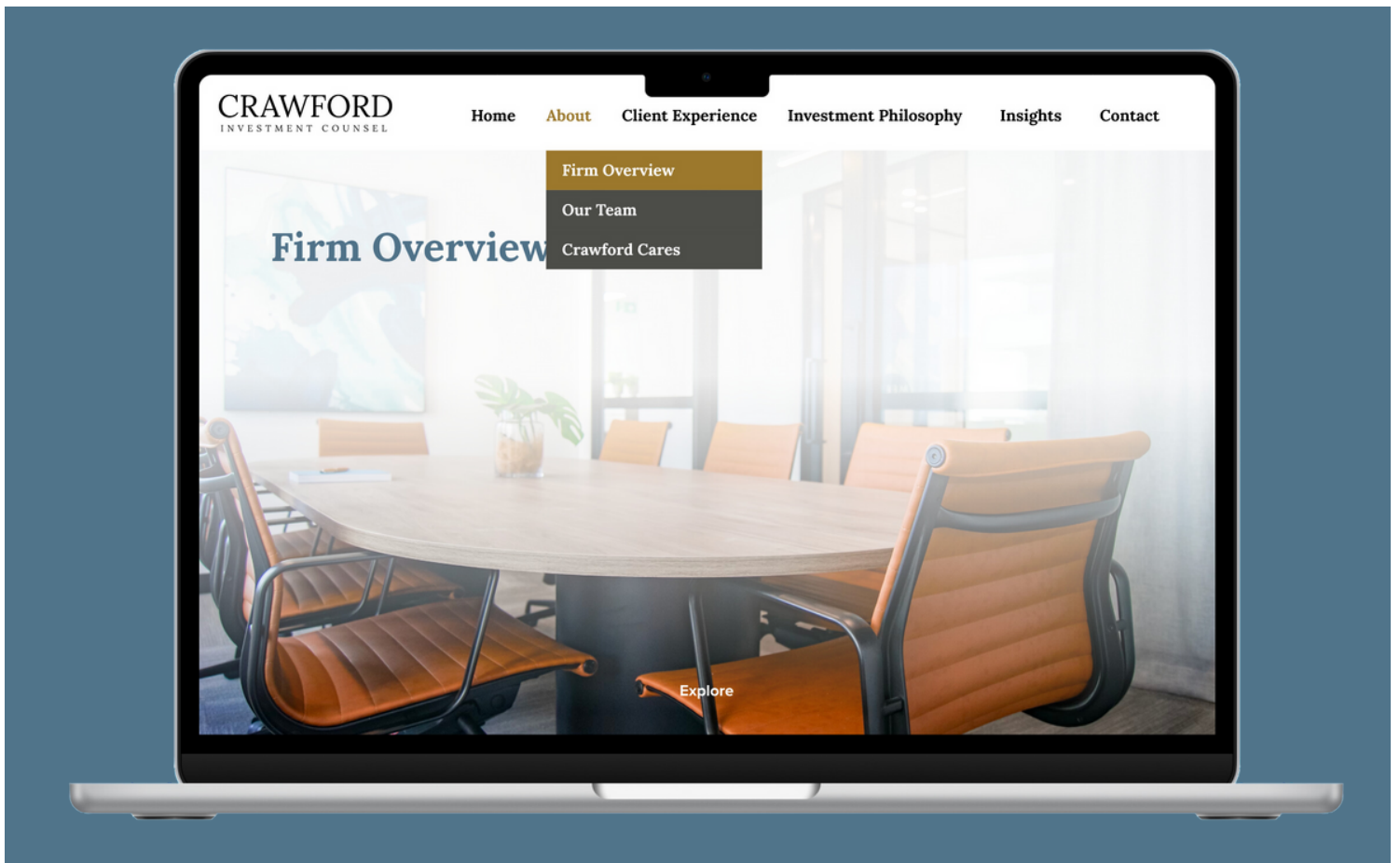
The information in the footer was condensed.



Website Redesign - About Tab

10 New "About" Tab

We created a new "About" tab with pages that were originally under "Home" to increase the ease of user navigation on the website, eliminating the subtabs under the "Home" tab.

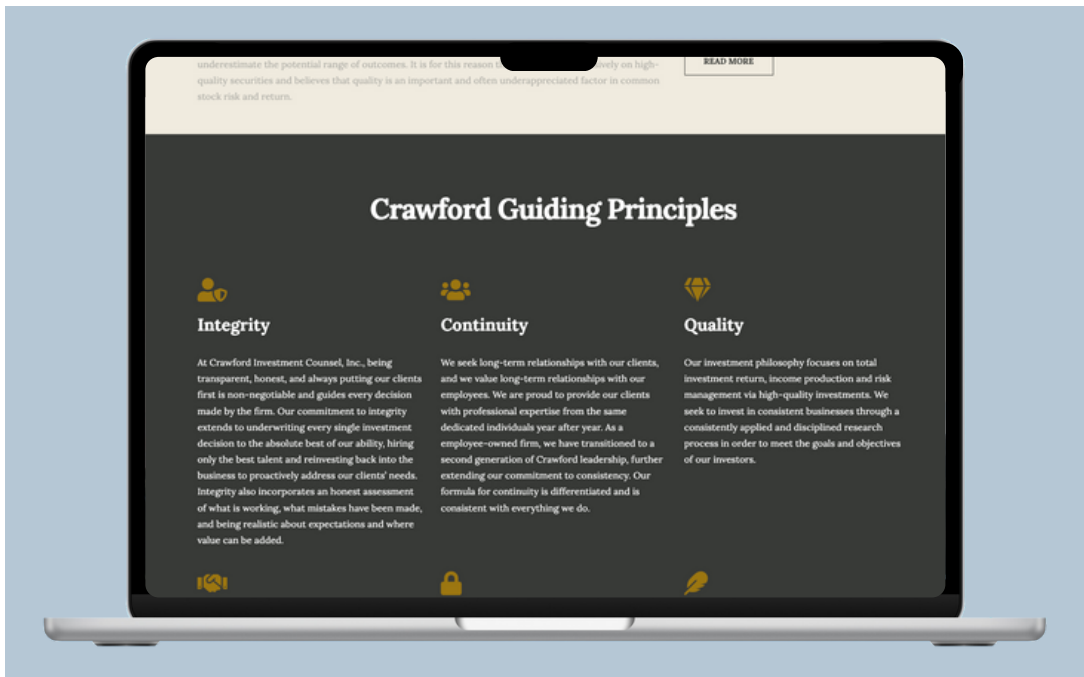


Website Redesign - Firm Overview

11

Firm Overview

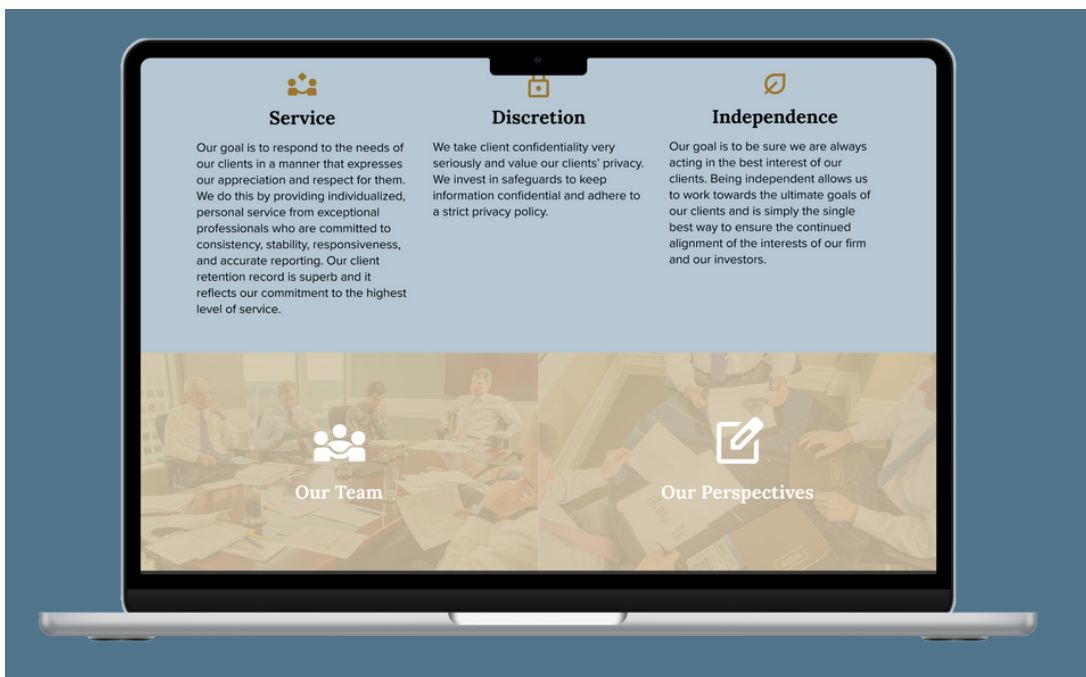
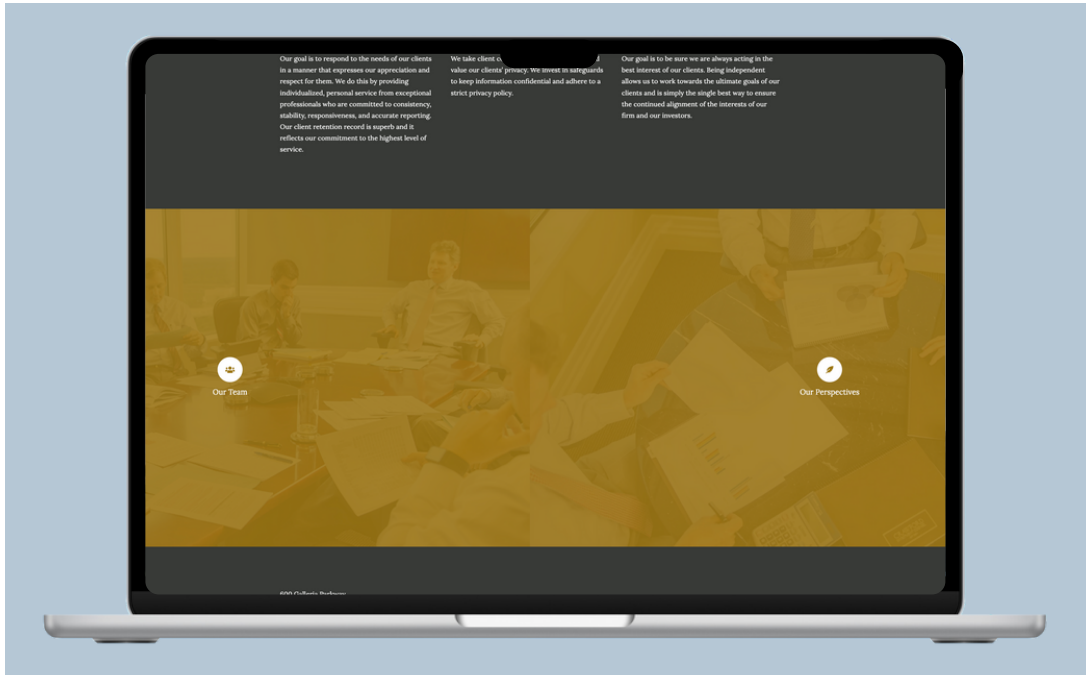
The box above the Crawford Guiding Principles was deleted. The logos were centered, and the overall look of the Crawford Guiding Principles section was changed.



Website Website Redesign - Firm Overview

12 Other Page Options

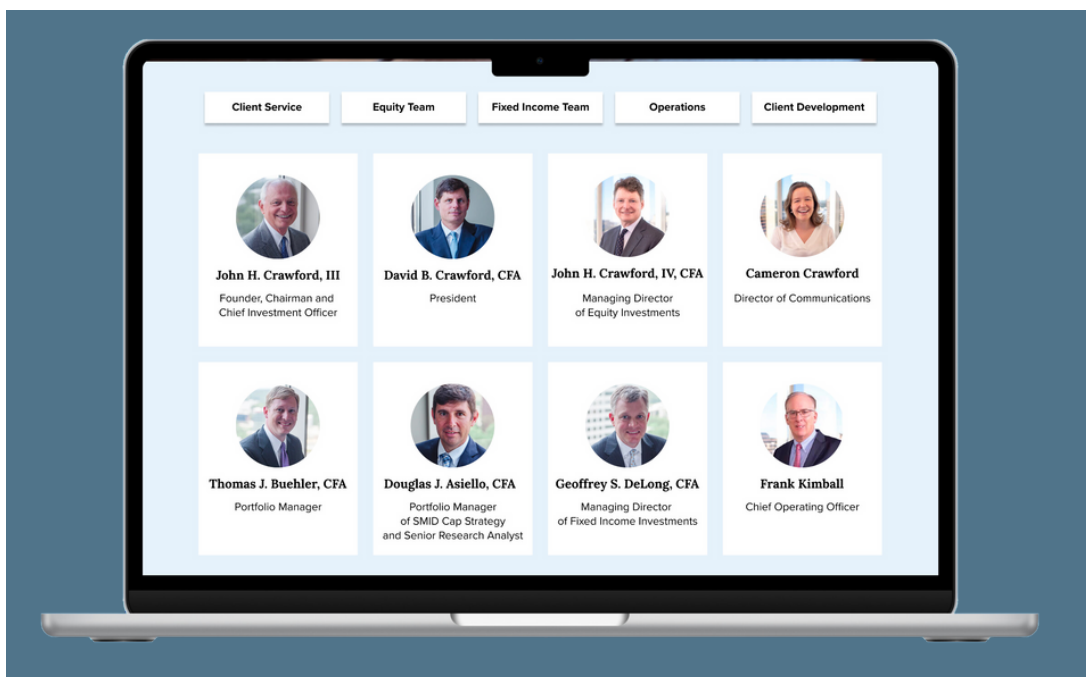
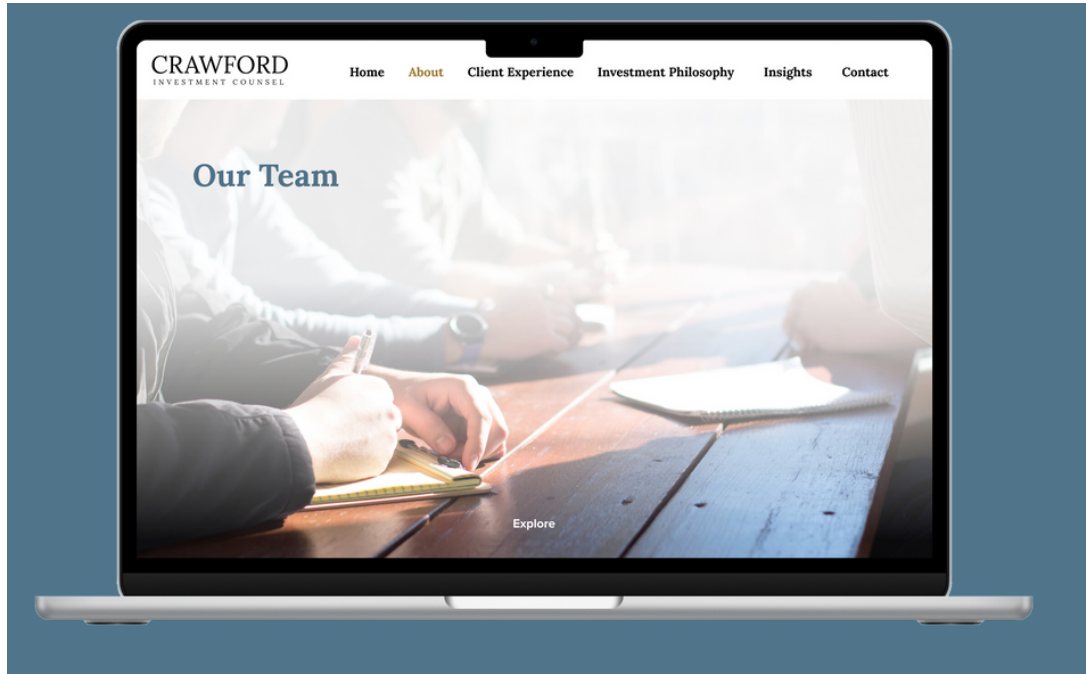
The logos that link to the other pages were changed, and a lighter color overlay was added.



Website Redesign - Our Team

13 Our Team

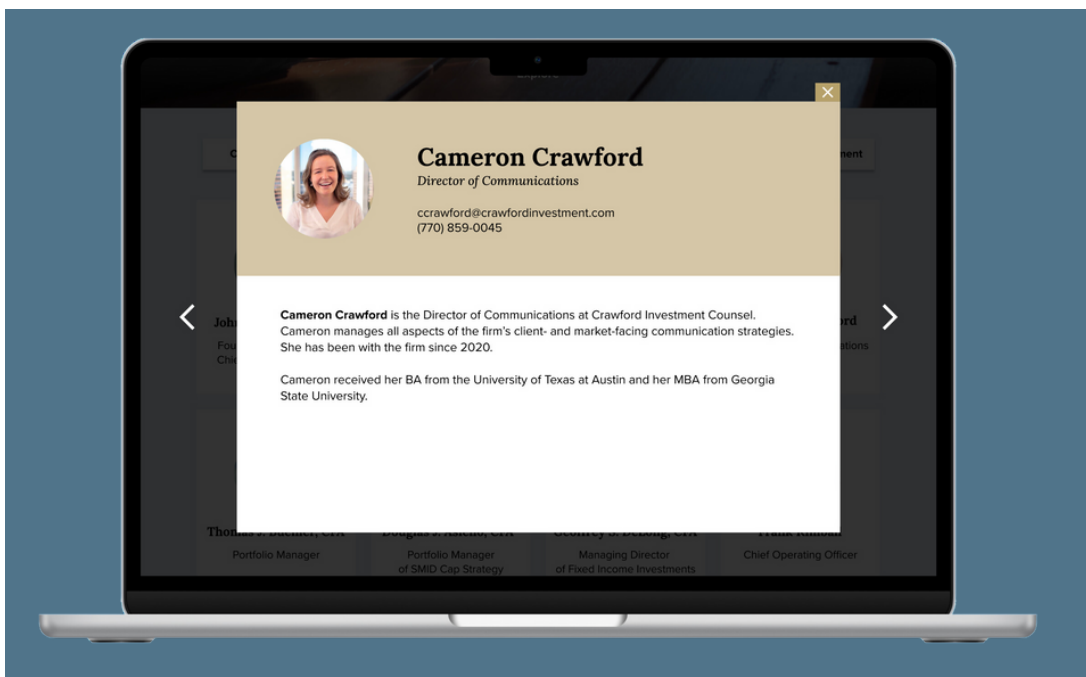
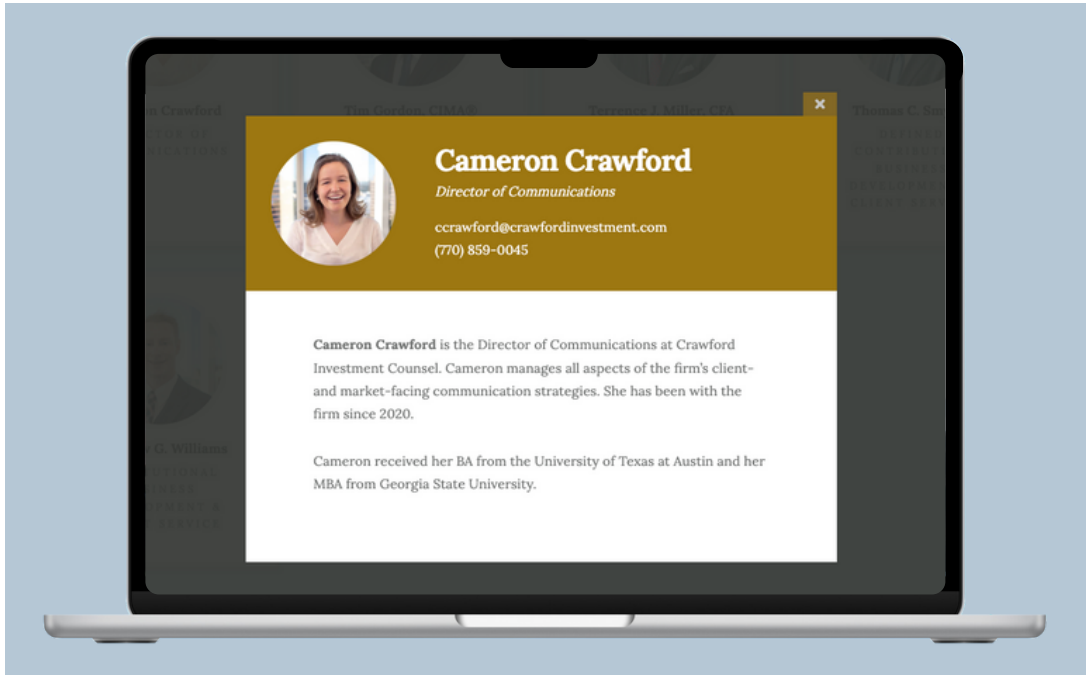
The background landing photo and the background color was changed.



Website Redesign - Our Team

14 Team Bios

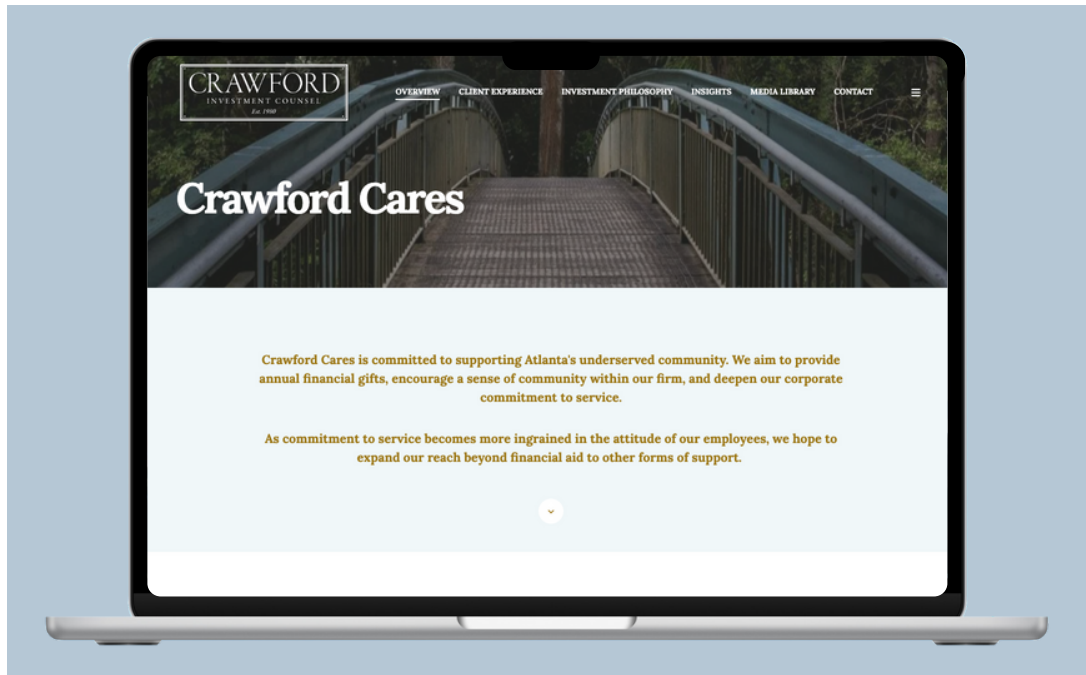
The colors were changed and the font for the body copy was changed to Proxima Nova.



Website Redesign - Crawford Cares

15 Crawford Cares

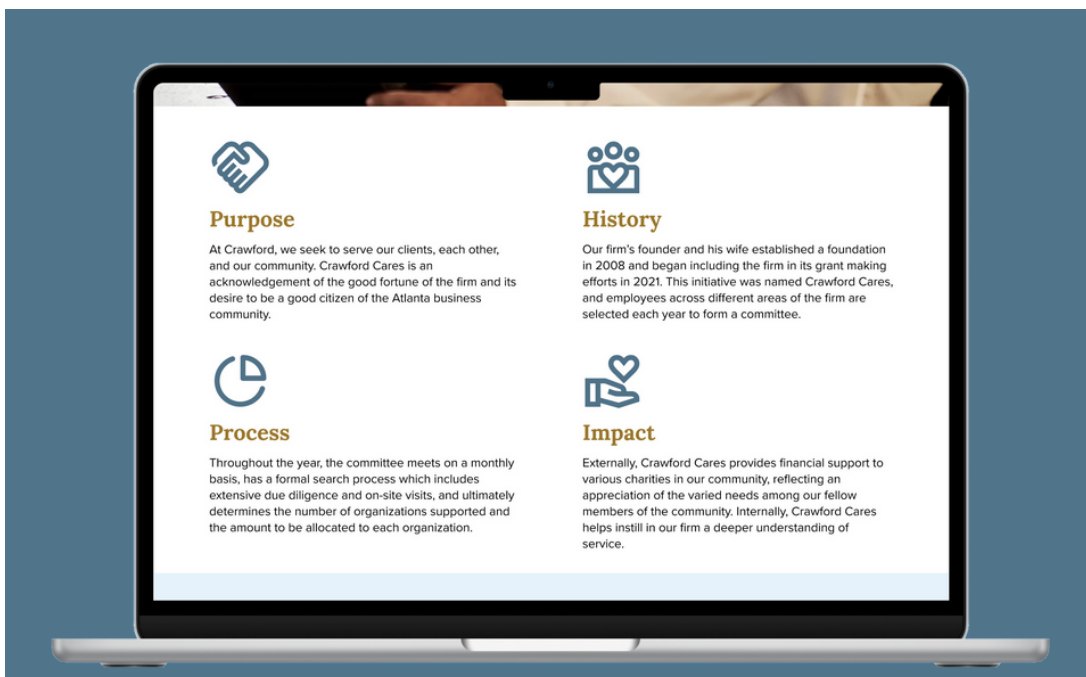
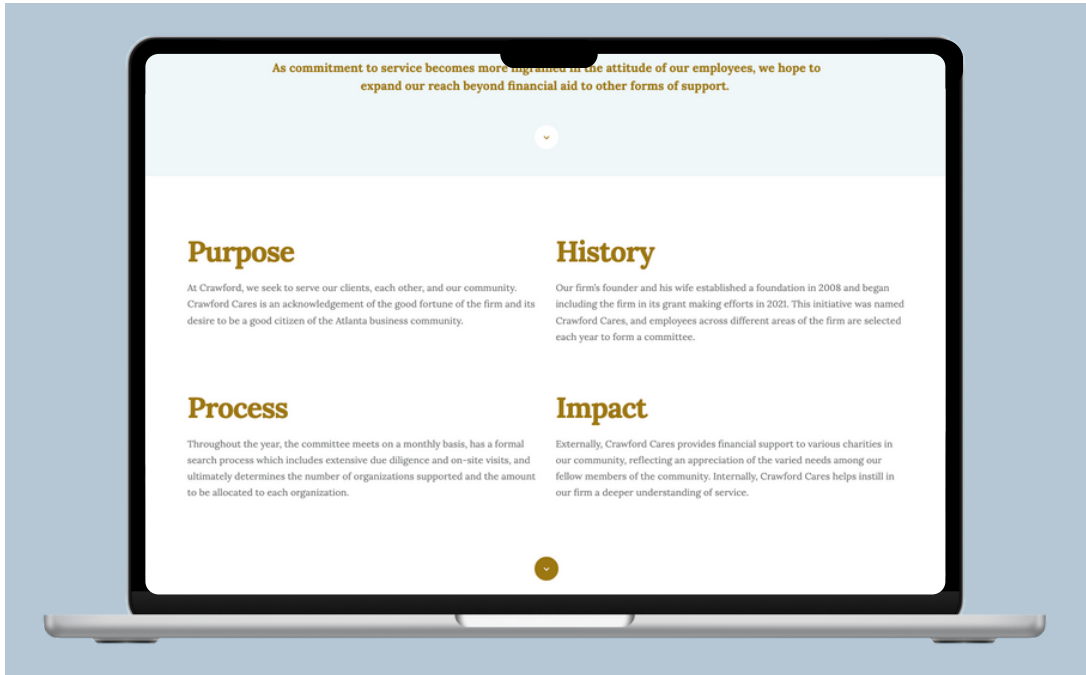
The copy was moved to the landing page to match the format of the other title pages and the font was changed to Proxima Nova.



Website Redesign - Crawford Cares

16 Crawford Cares

Logos were added to break up the text and create an easier reading experience.



Website Redesign - Crawford Cares

17 Crawford Cares Core Values

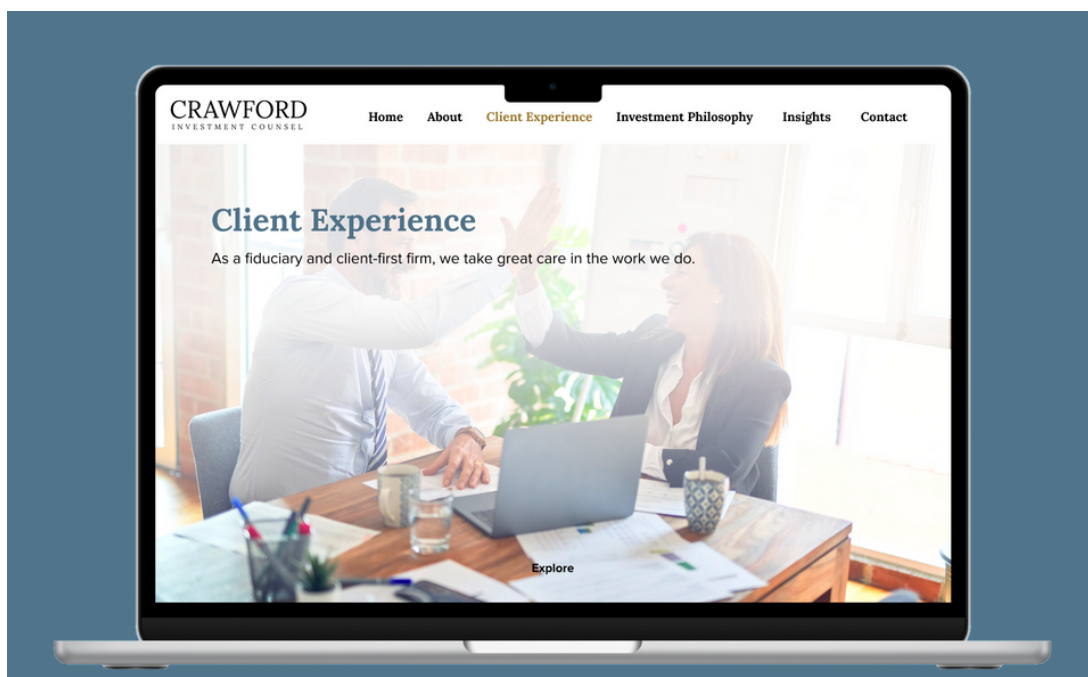
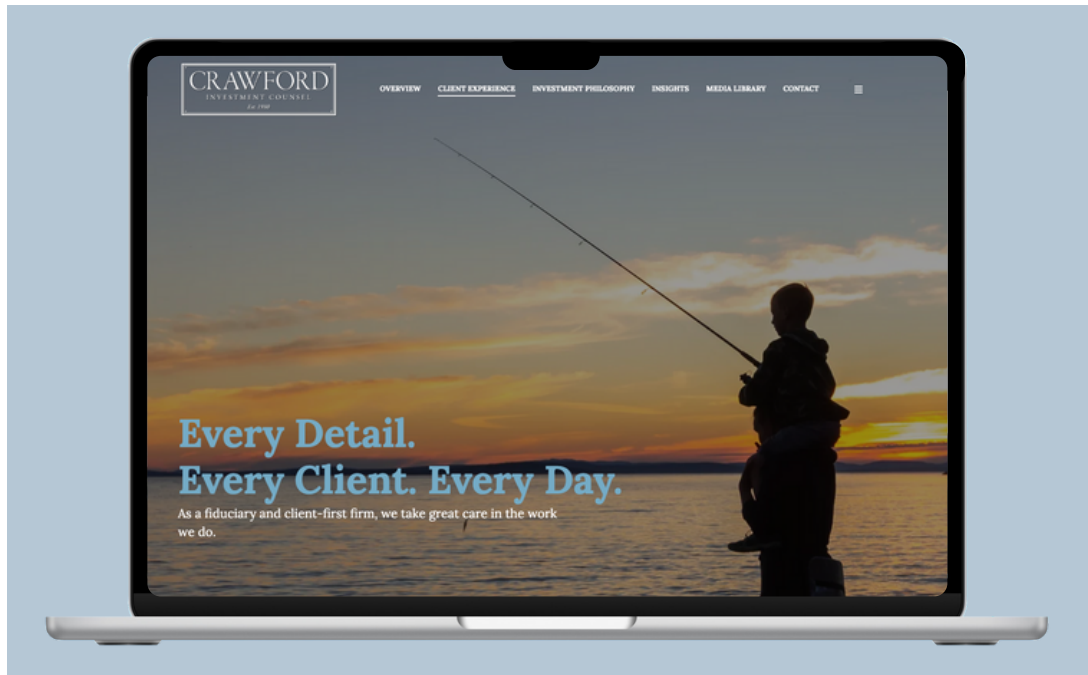
The colors, font, and word alignment were changed. Photos were added to go with the core values instead of icons to emphasize the message. The organizations' logos are also more spread out and less cramped.



Website Redesign - Client Experience

18 Client Experience

The background photo was changed, and the title was altered to the normal tab title instead of "Every Detail. Every Client. Every Day."



Website Redesign - Client Experience

19 New Perpetual Accumulation™ graphic

The new Perpetual Accumulation™ graphic replaced the old graphic.

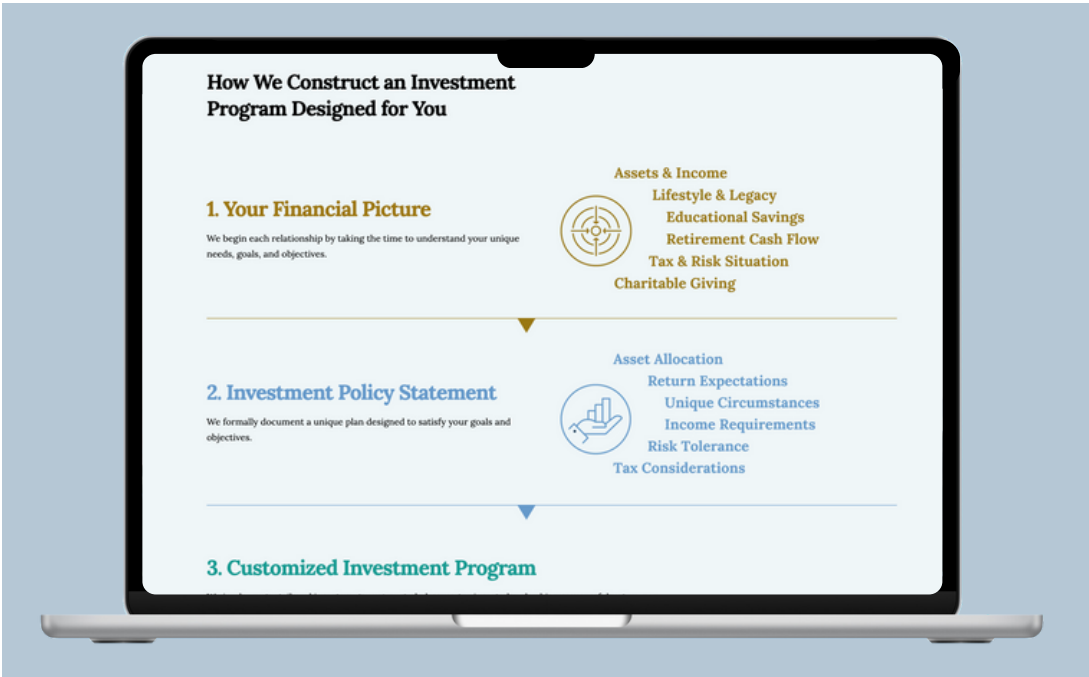


Website Redesign - Client Experience

20

Customized Investment Program

The title was changed to fit text as well as getting rid of the "How we".



Website Redesign - Client Experience

21 Client Experience

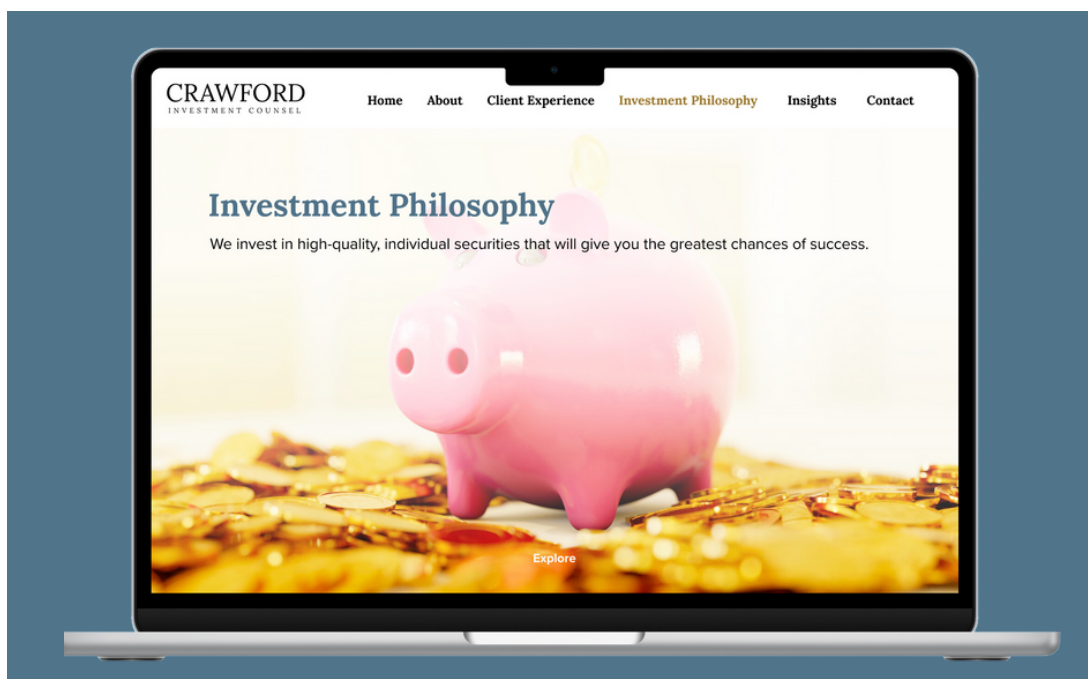
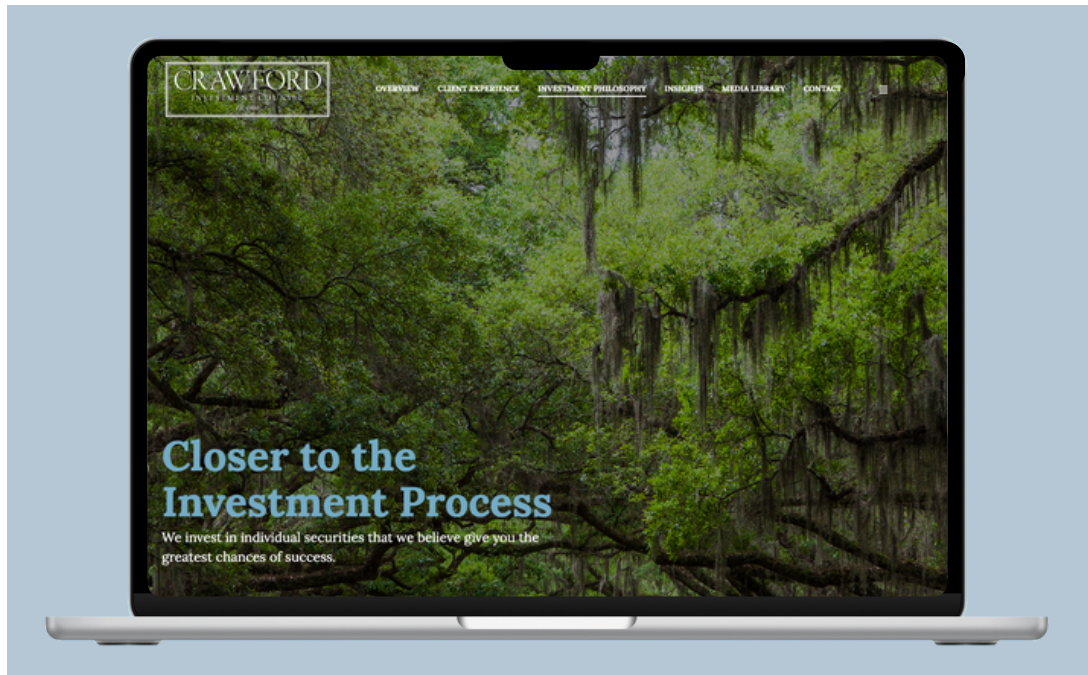
The "Crawford Balanced Strategy" section was deleted, so the video description can have more impact.



Website Redesign - Investment Philosophy

22 Investment Philosophy

The landing page photo, title, and subtitle were changed to match the new theme.

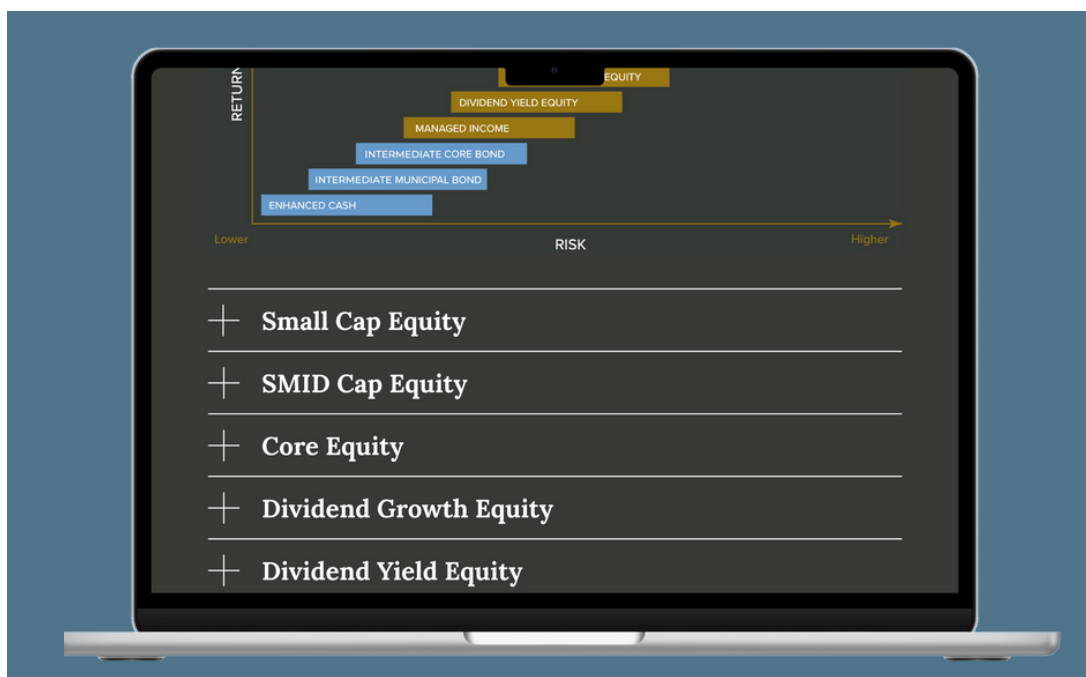
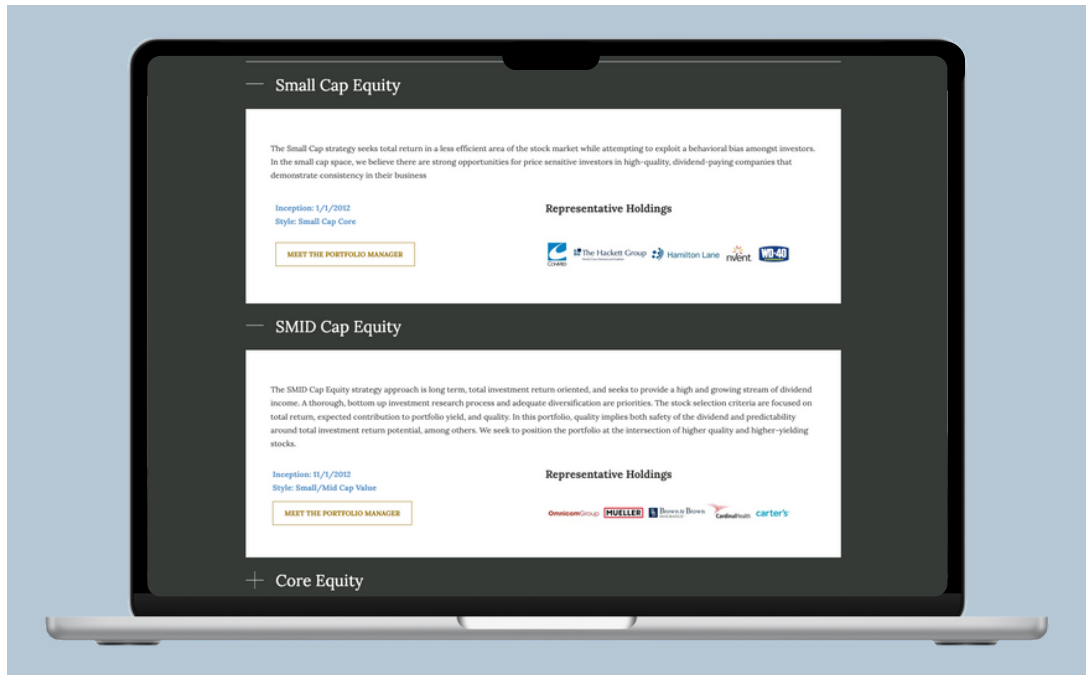


Website Redesign - Investment Philosophy

23

Investment Philosophy

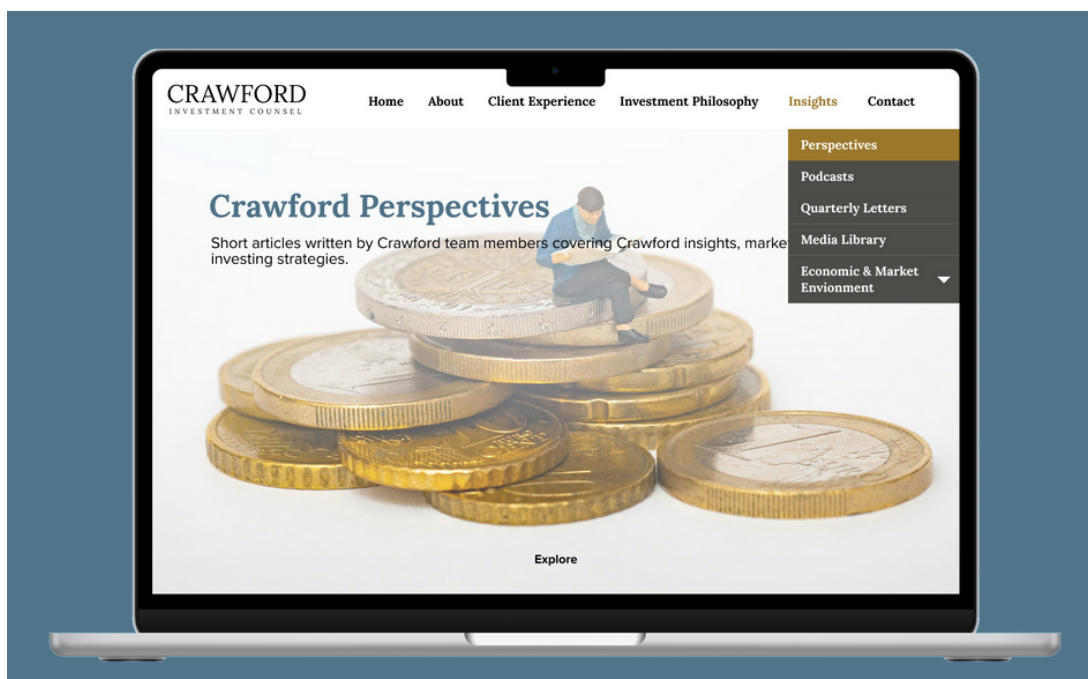
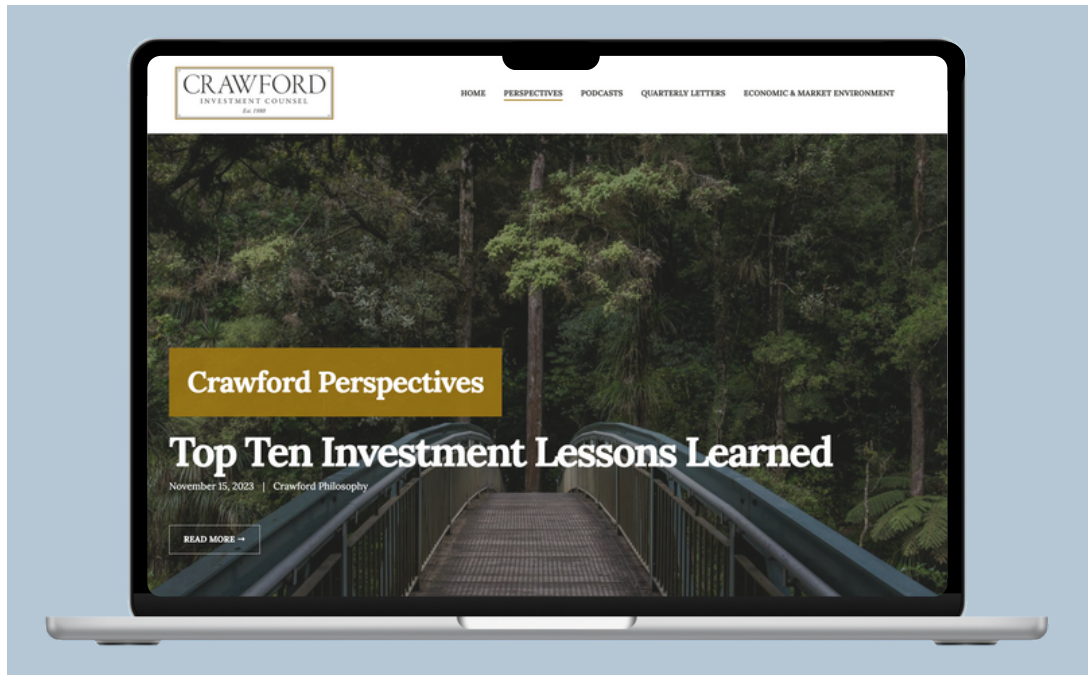
The layout was changed so that the Small and SMID Cap Equity boxes were not automatically opened.



Website Redesign - Perspectives

24 Perspectives

The navigation bar and site stay the same rather than moving to a "new" site. The subtitle was changed, so users have context for what "Perspectives" means. The background is no longer the most recent perspective, instead featuring a static photo in alignment with the tab title.

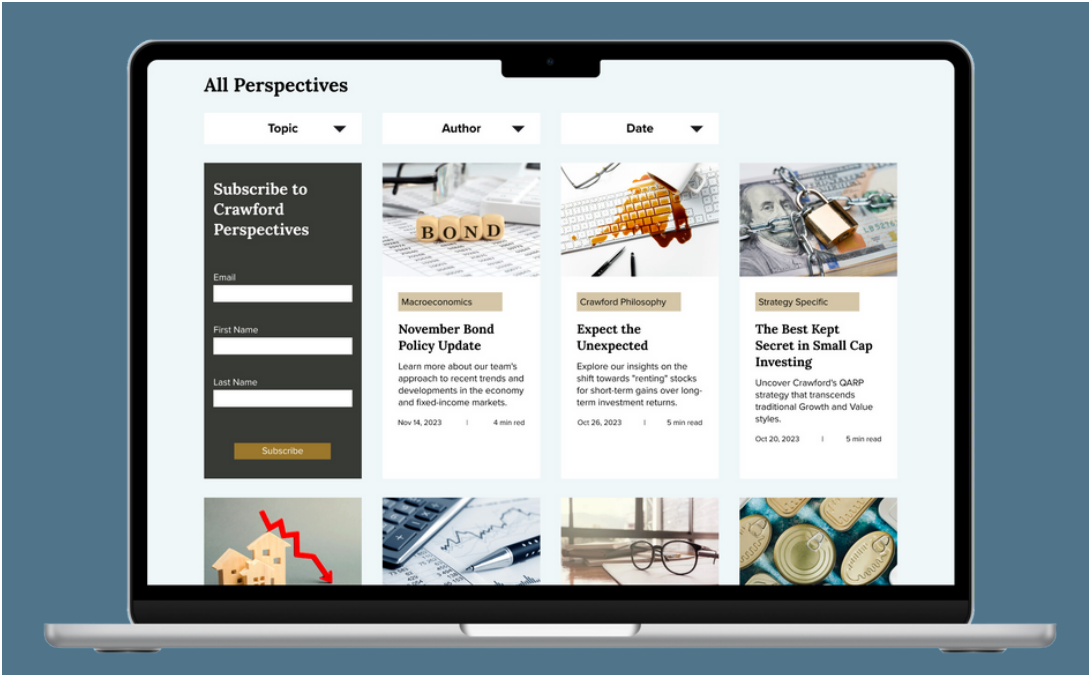
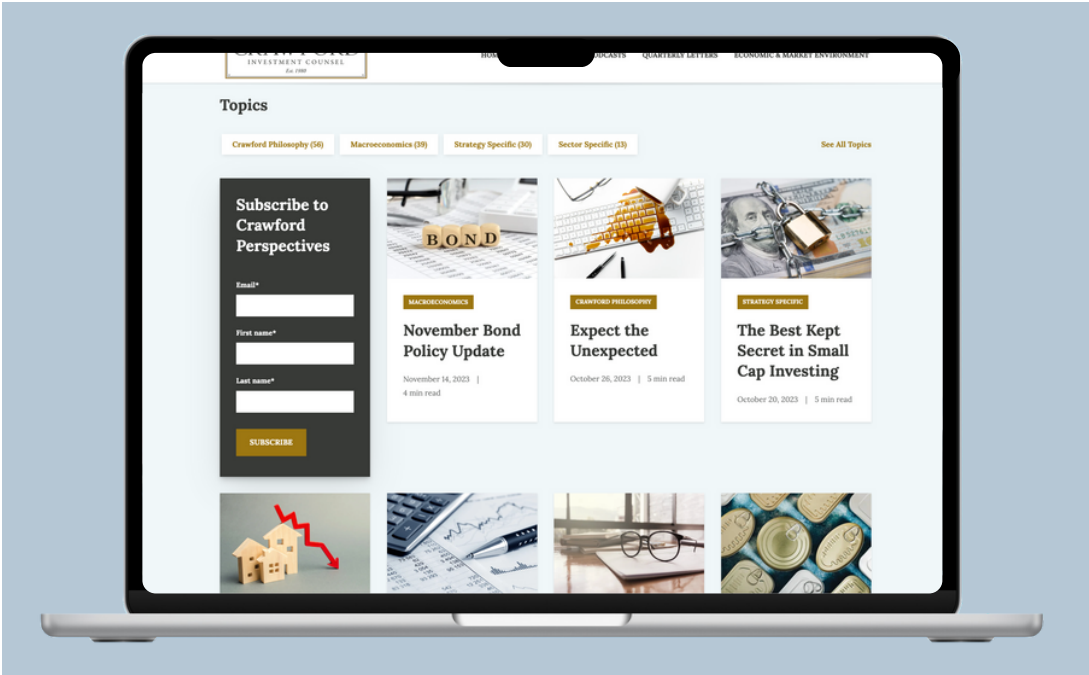


Website Redesign - Perspectives

25

Filtering Perspectives

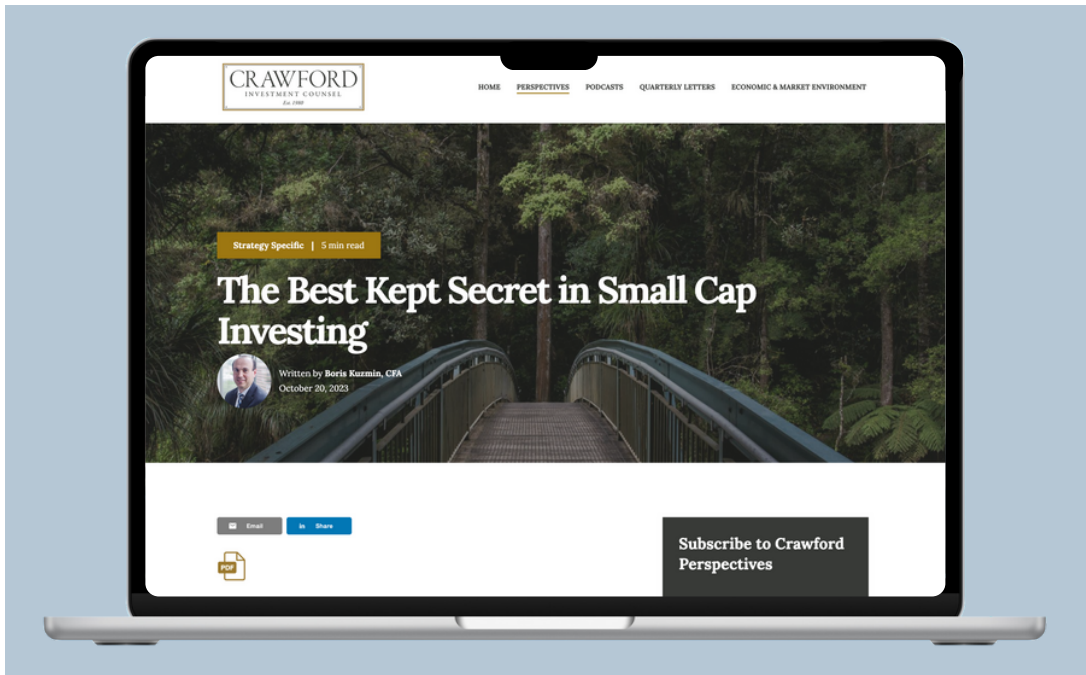
There is a new filtering system across all pages on the Insights tab. The Media Library filtering system also changed but uses a different one from the Perspectives page. All the boxes are now the same size to be more visually pleasing. Blurbs were added to the Perspectives and the publishing date and read time now show up on one line. Proxima Nova font replaced the font for non-header copy. The tag color also changed.



Website Redesign - Perspectives

26 Perspective Example

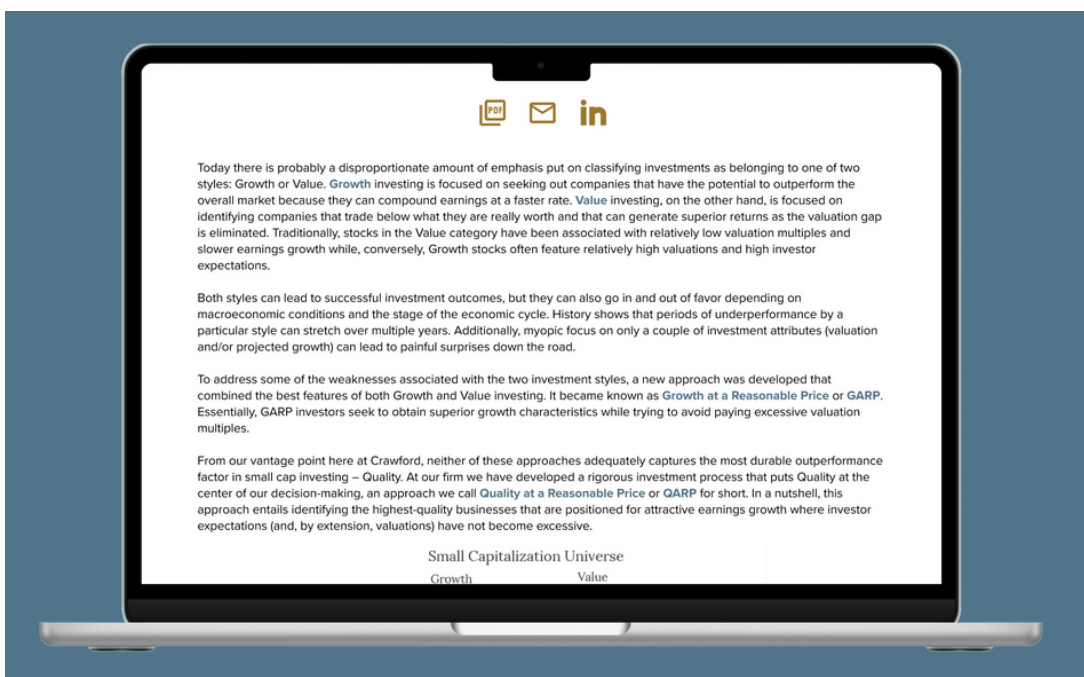
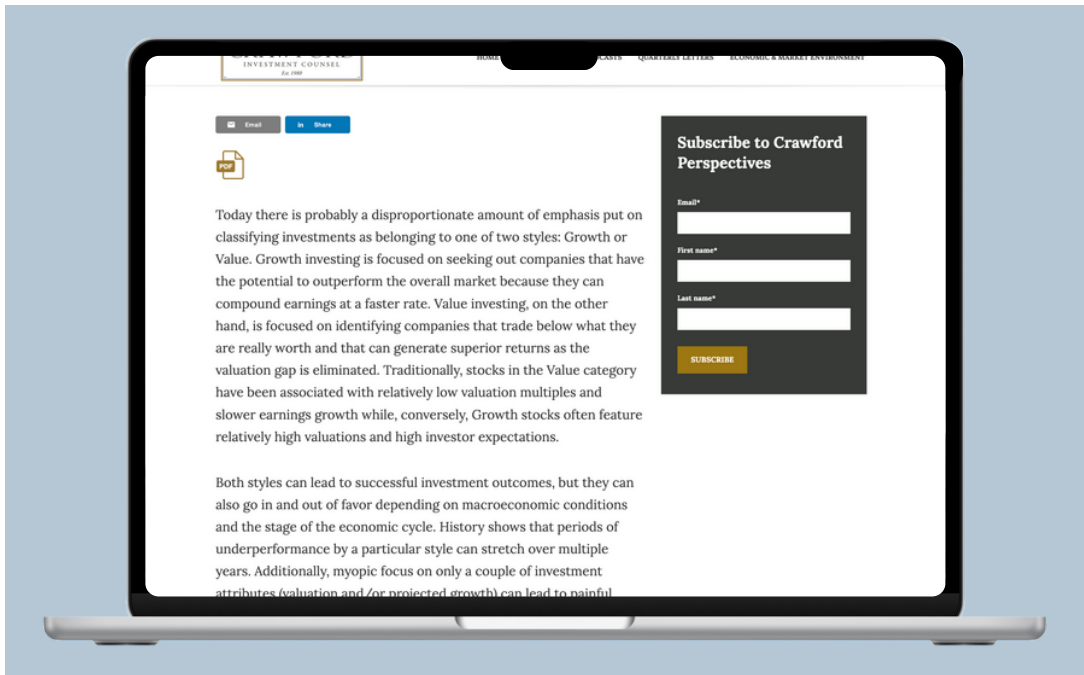
The information has more room to breathe with larger spacing. The background was replaced with a contextual background photo as well as an added blue overlay on top to keep visuals cohesive. All non-header text was changed to Proxima Nova.



Website Redesign - Perspectives

27 Perspective Example

The buttons were simplified into icons for PDF download and sharing. Throughout the copy, there are important terms that are highlighted so readers can easily skim for information. The “Subscribe” box was also moved to the end of the Perspective to create an easier reading experience.

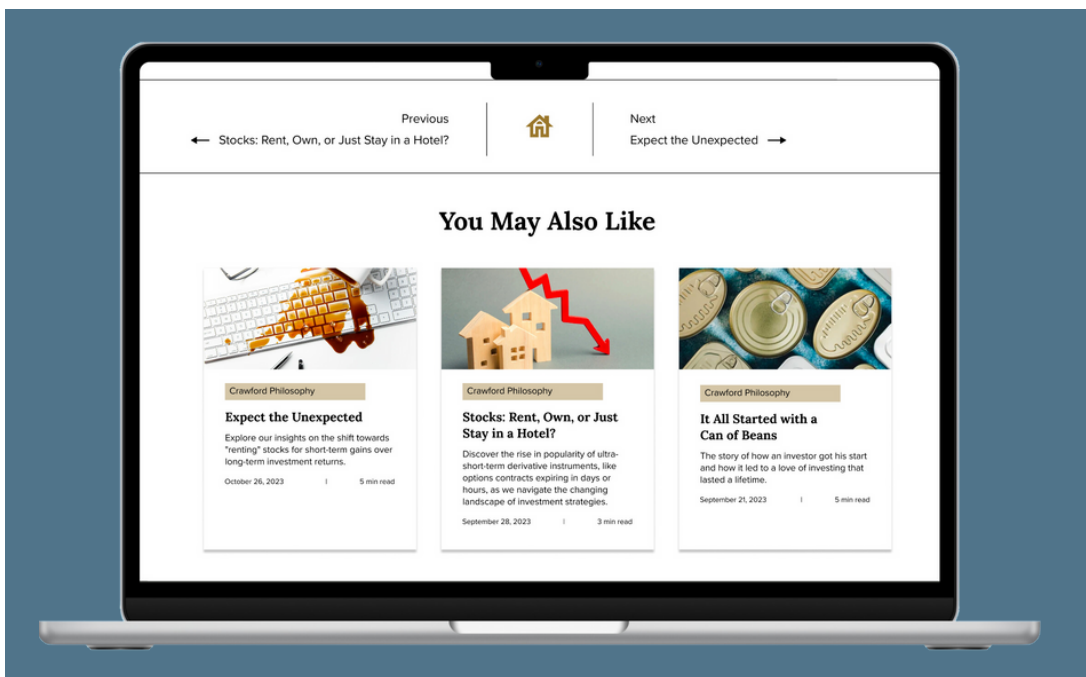
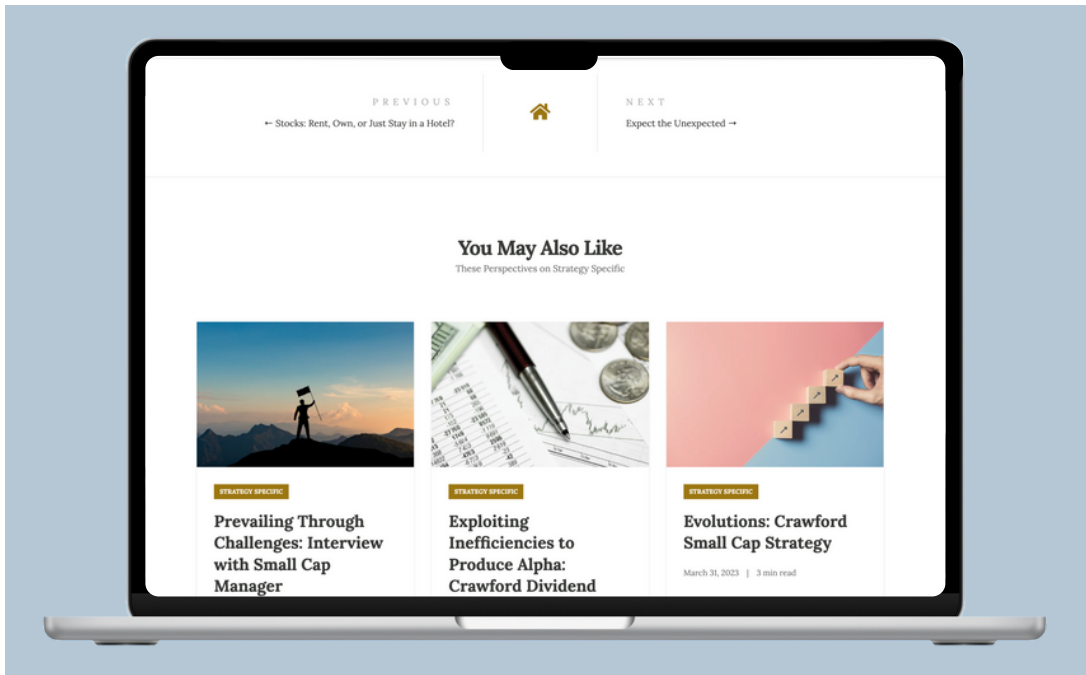


Website Redesign - Perspectives

28

Perspective Example

The previous and next section was slightly modified, with the letter spacing changed, and the “You May Also Like” section was updated similar to the Perspectives list to match.

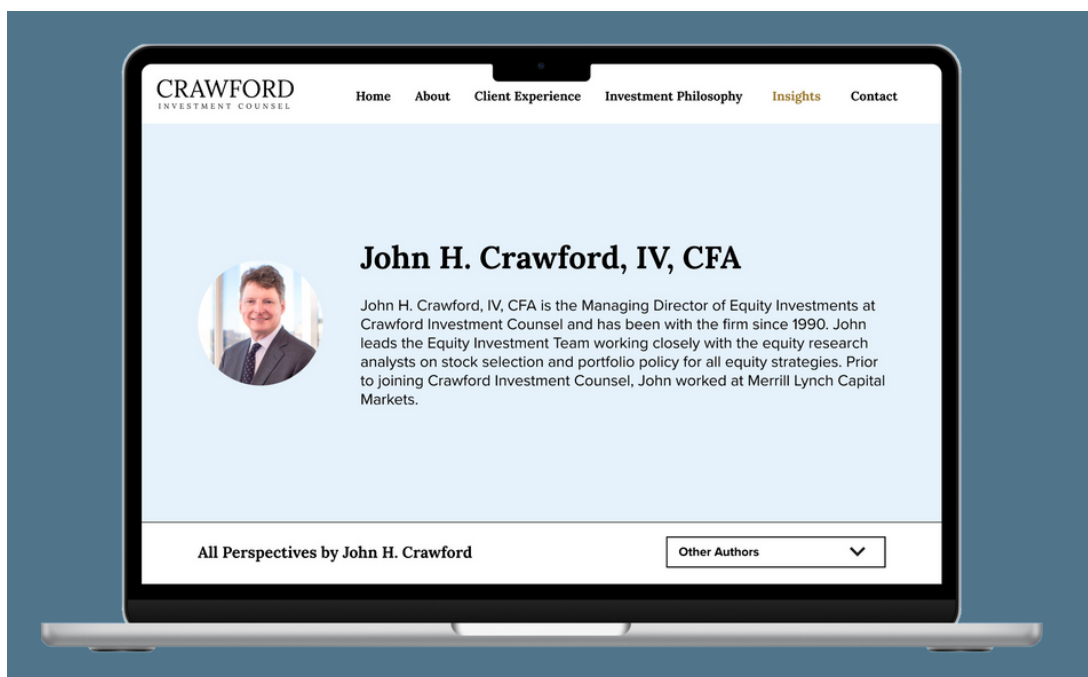
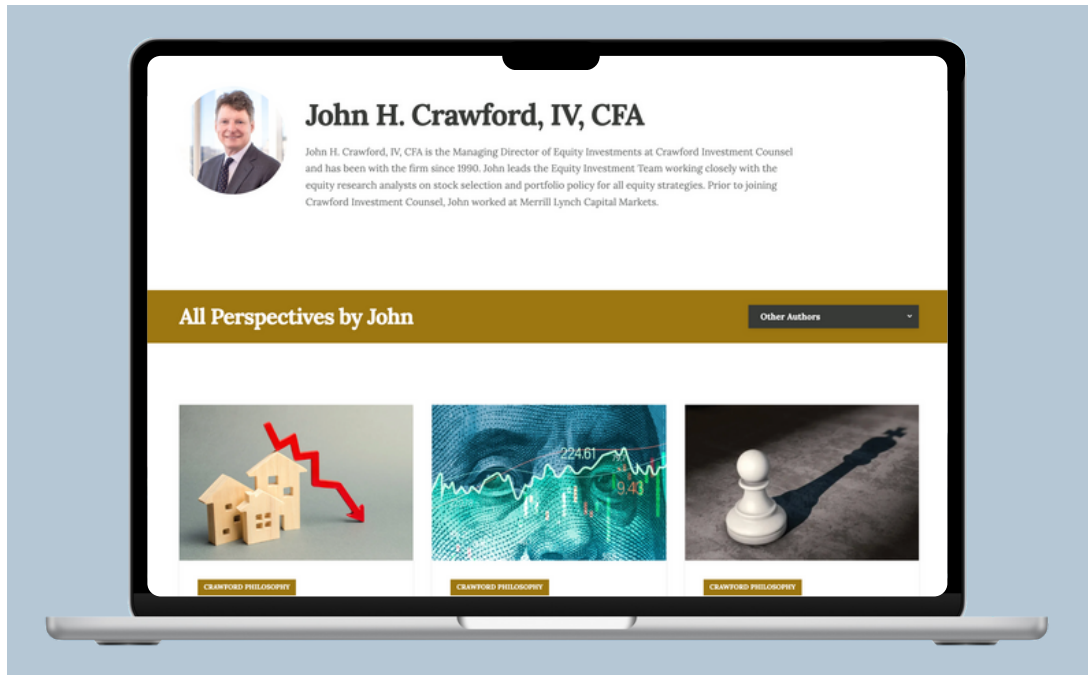


Website Redesign - Perspectives

29

Perspectives By A Specific Author

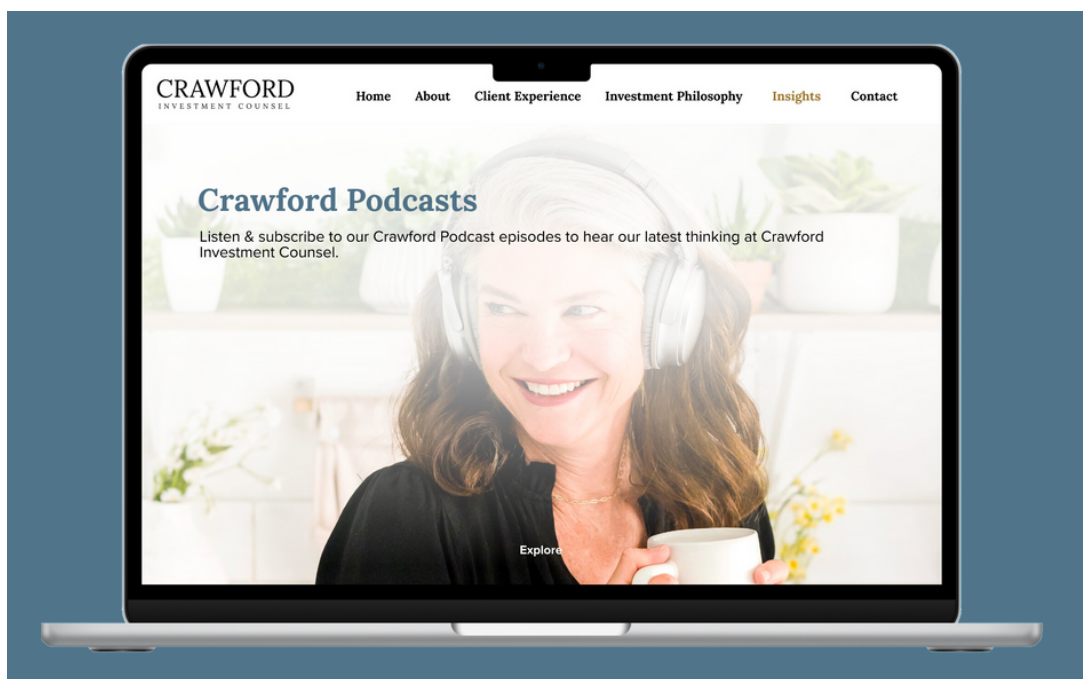
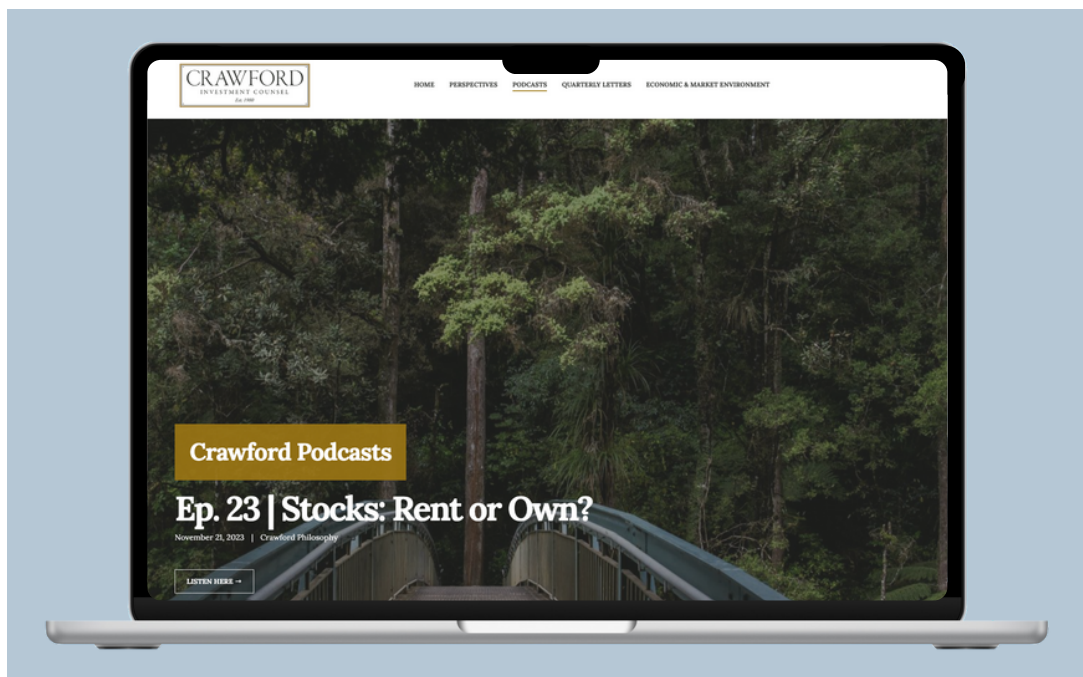
A bigger landing page was created with a larger profile picture while spacing out the biography and changing the body font to Proxima Nova. The Perspectives were also updated to match the new look and contain a short description of the content for preview.



Website Redesign - Podcasts

30 Podcasts Landing Page

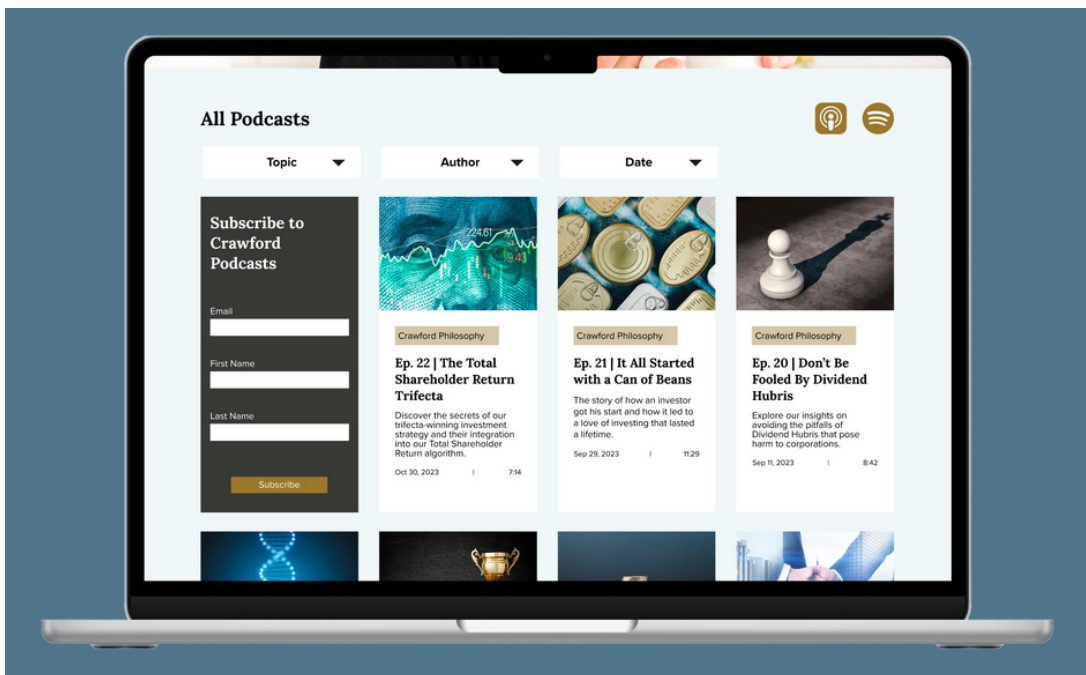
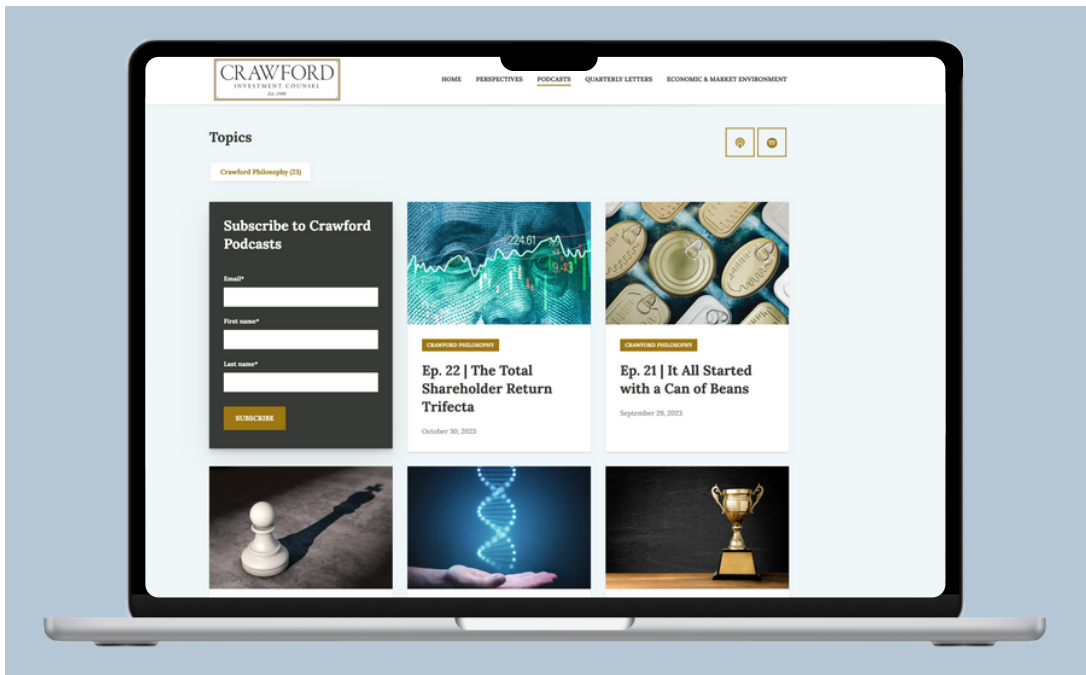
Once again, the navigation bar and site stay the same rather than moving to a "new" site. The landing page changed from the most recent podcast to a simple landing page with a title, subtitle, and new background image.



Website Redesign - Podcasts

31 Podcasts

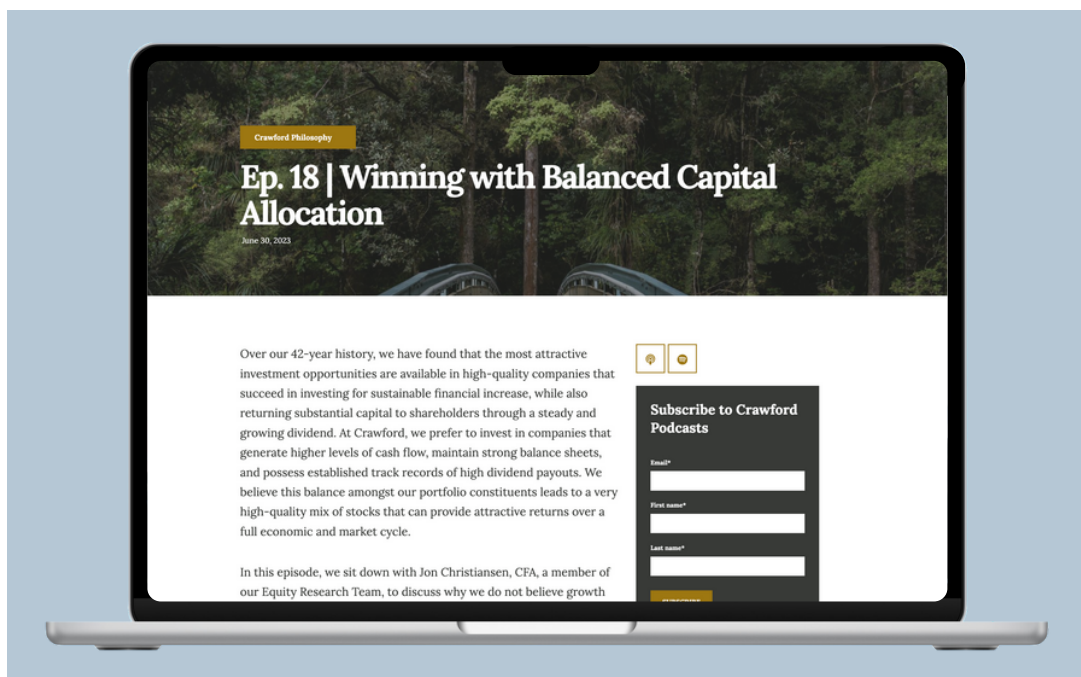
There are new logo designs linking to platforms to listen to Crawford Podcasts. Similarly to Perspectives, there is a new filtering system, four columns to match the Perspectives page, updated tag colors with every new Podcast box, and added blurbs, publishing date, and podcast length which were combined on one line. For the "Subscribe" box, the copy was changed to "Crawford Podcasts" instead of "Audio Blog" and the box size matches the other podcast boxes.



Website Redesign - Podcasts

32 Podcast Example

Aligning to the Perspectives page again, there is a photo that matches the concept of the Podcast episode. There are new logos with no square outlines moved to the top center of the page.

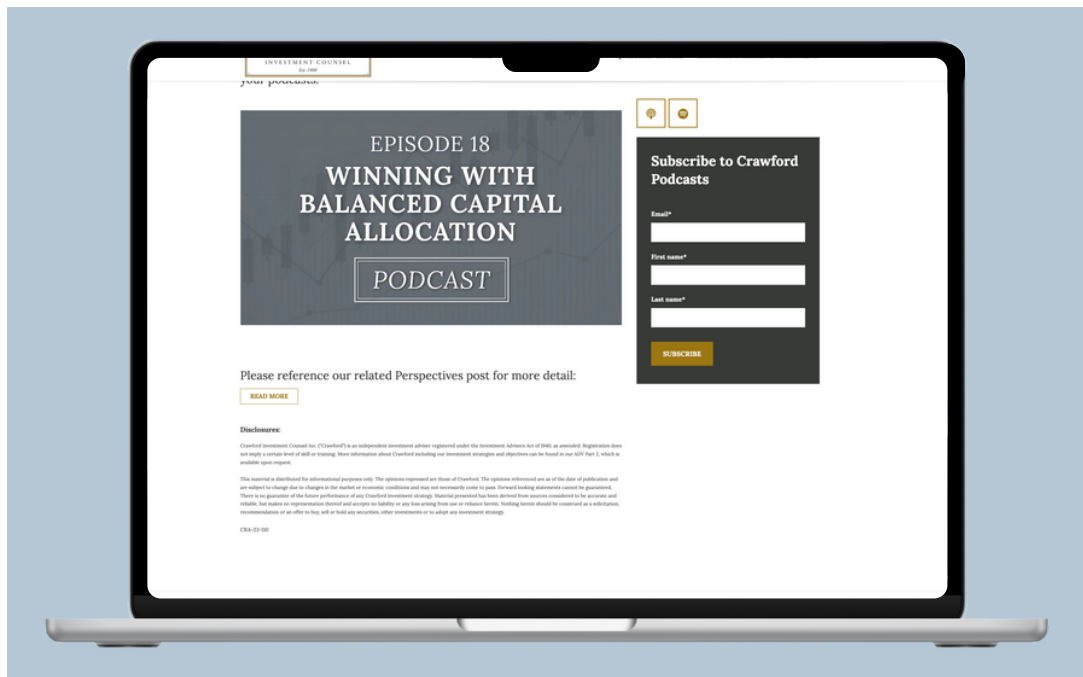


Website Redesign - Podcasts

33

Podcast Example

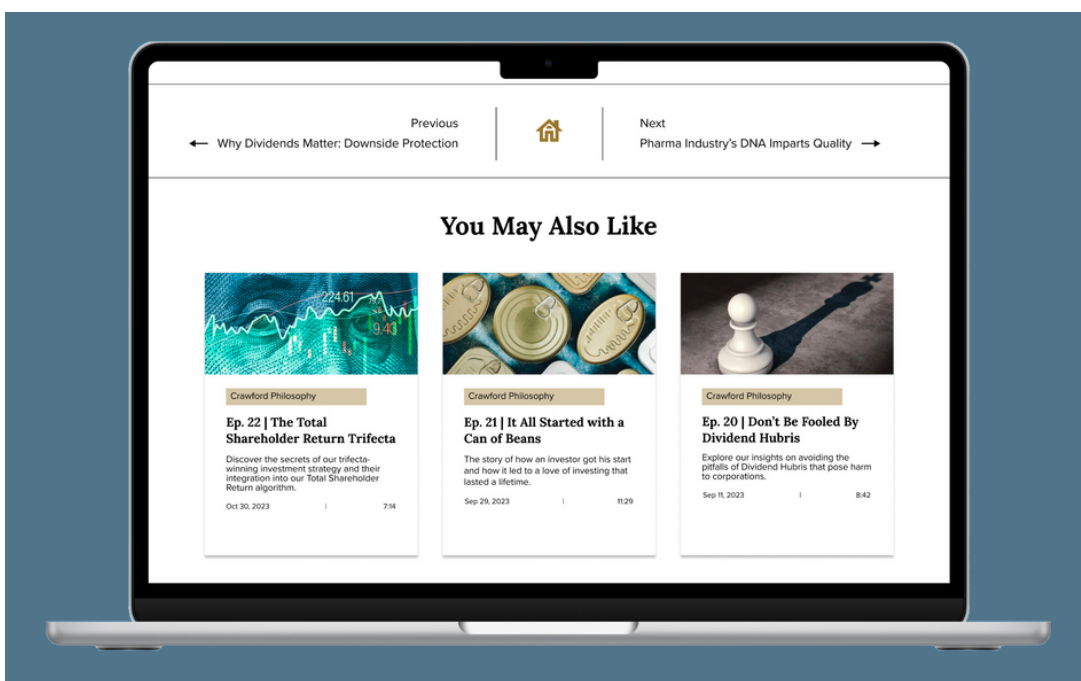
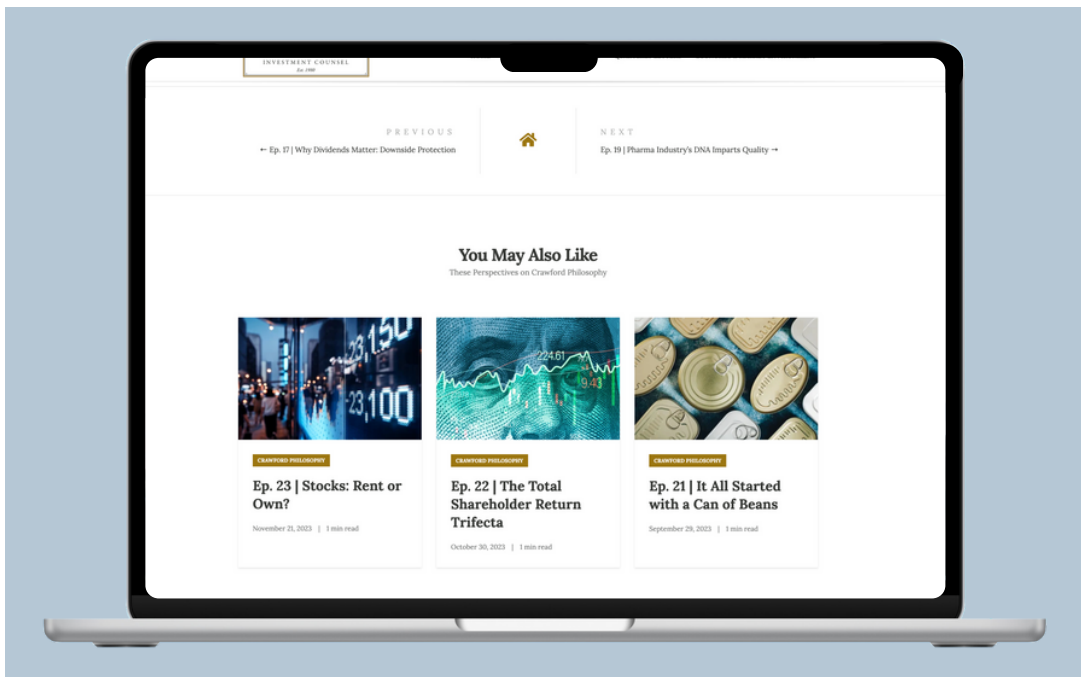
The subscribe box is now at the end to match the Perspectives page to not distract the listener. There is now a new button look that says “Learn More” rather than “Read More”.



Website Redesign - Podcasts

34 Podcast Example

The bottom navigation bar and other Podcasts section was updated.

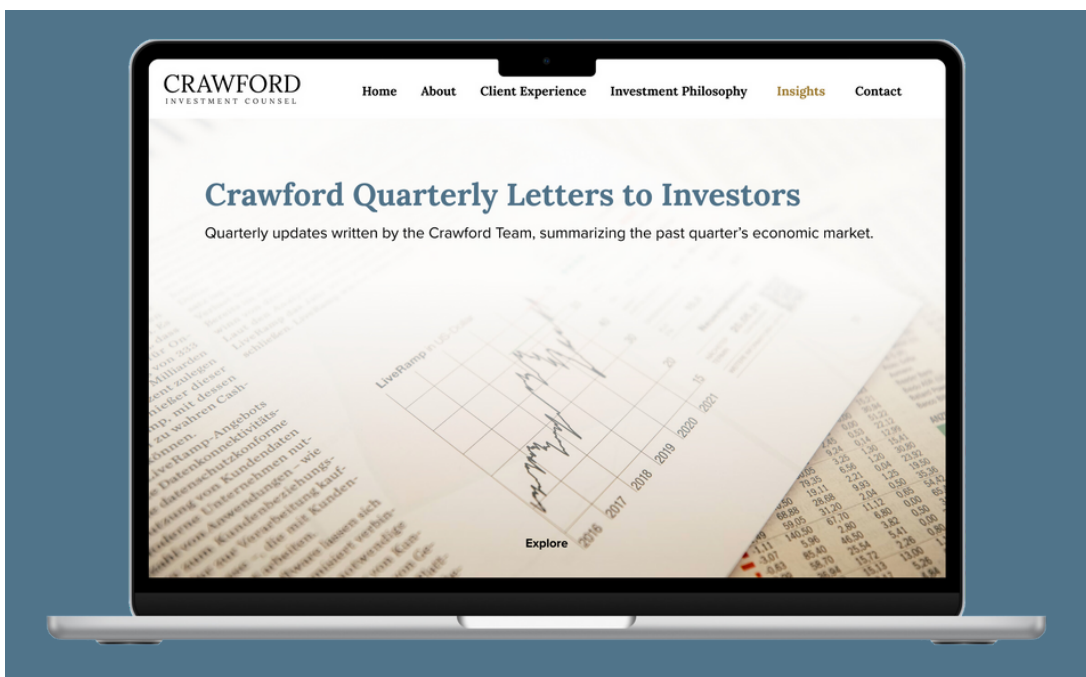


Website Redesign - Quarterly Letters

35

Quarterly Letters Landing Page

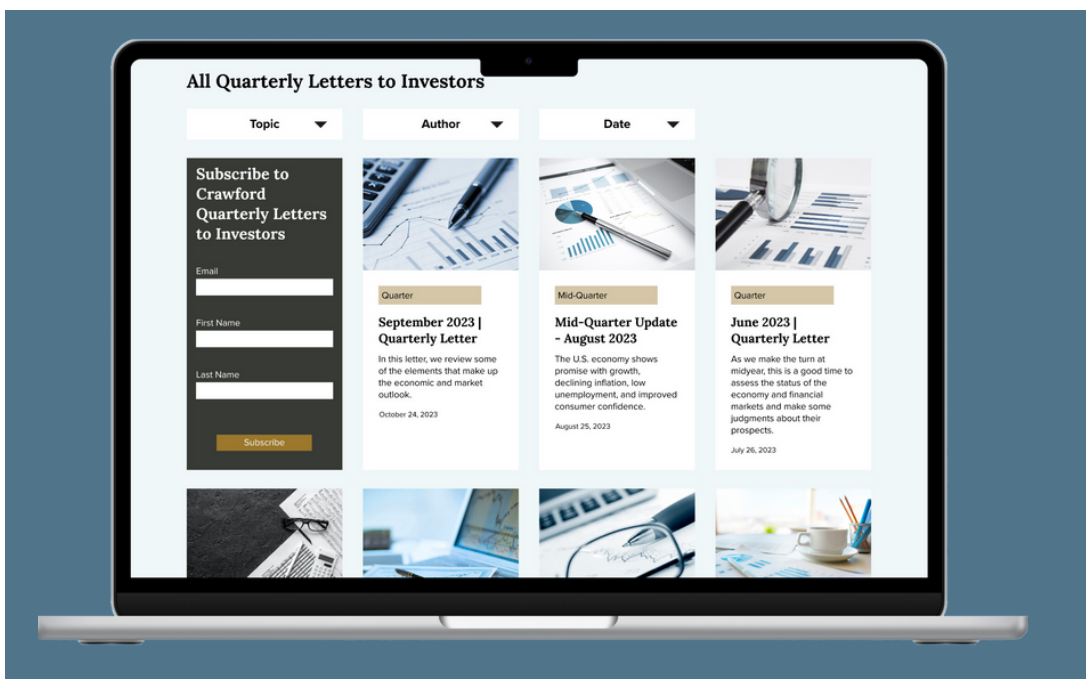
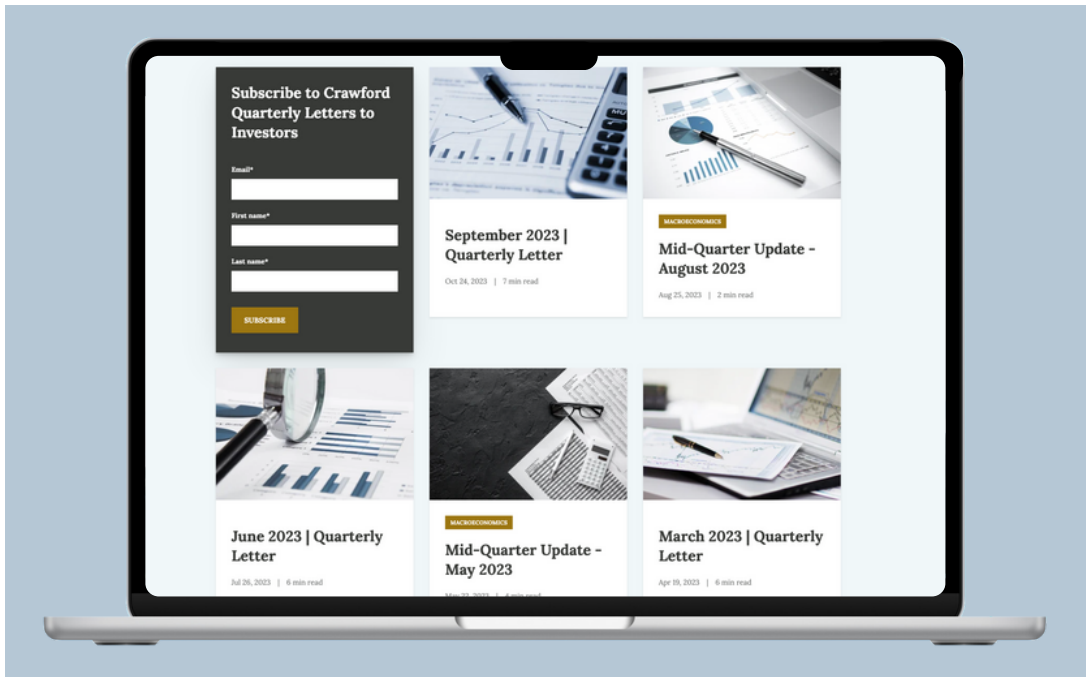
A new landing page with title, subtitle, and background photo was created.



Website Redesign - Quarterly Letters

36 Quarterly Letters List

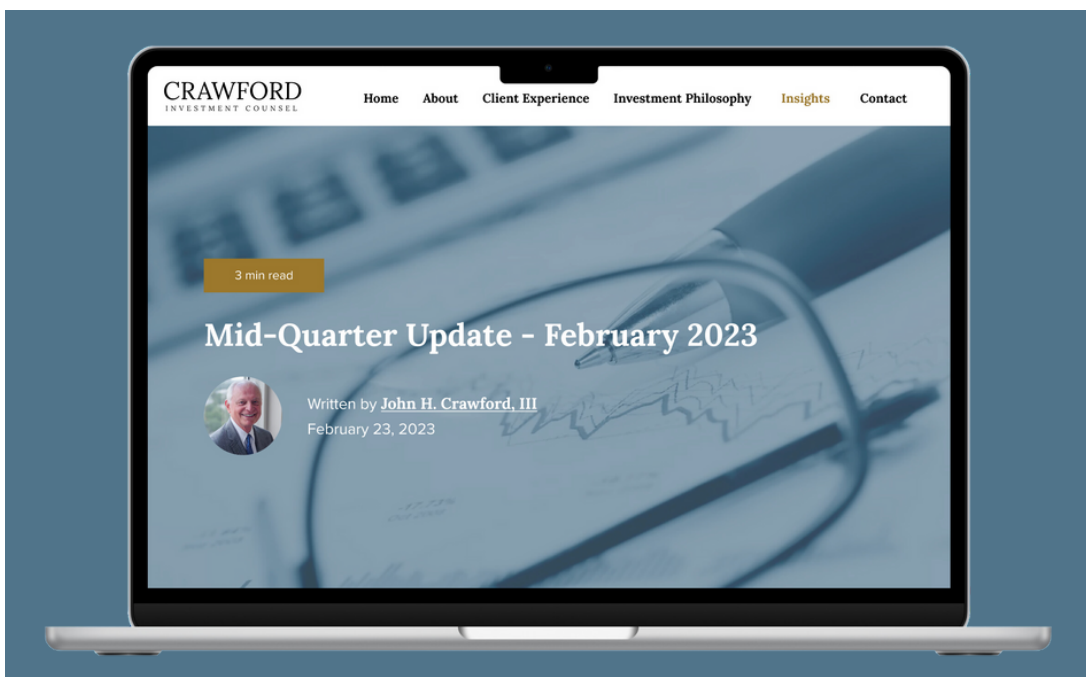
To match the other Insights tabs, there is a new filter system, the boxes are the same size, four columns were added, and blurbs, published date, and read time were added. The boxes have new tags and justified the publishing date on the left side.



Website Redesign - Quarterly Letters

37 Quarterly Letter Example

The landing page was changed to match the others with added read time as well as the blue overlay on top of the background photo.

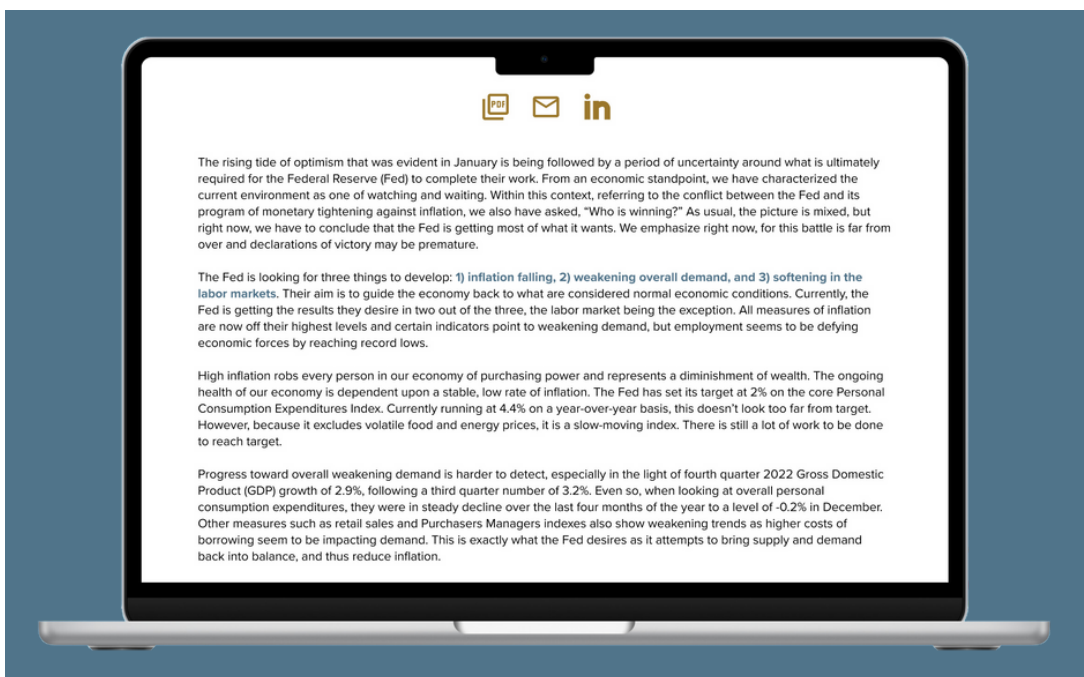


Website Redesign - Quarterly Letters

38

Quarterly Letter Example

The buttons were simplified into icons for PDF download and sharing. Throughout the copy, there are important terms that are highlighted for readers to easily skim for information.

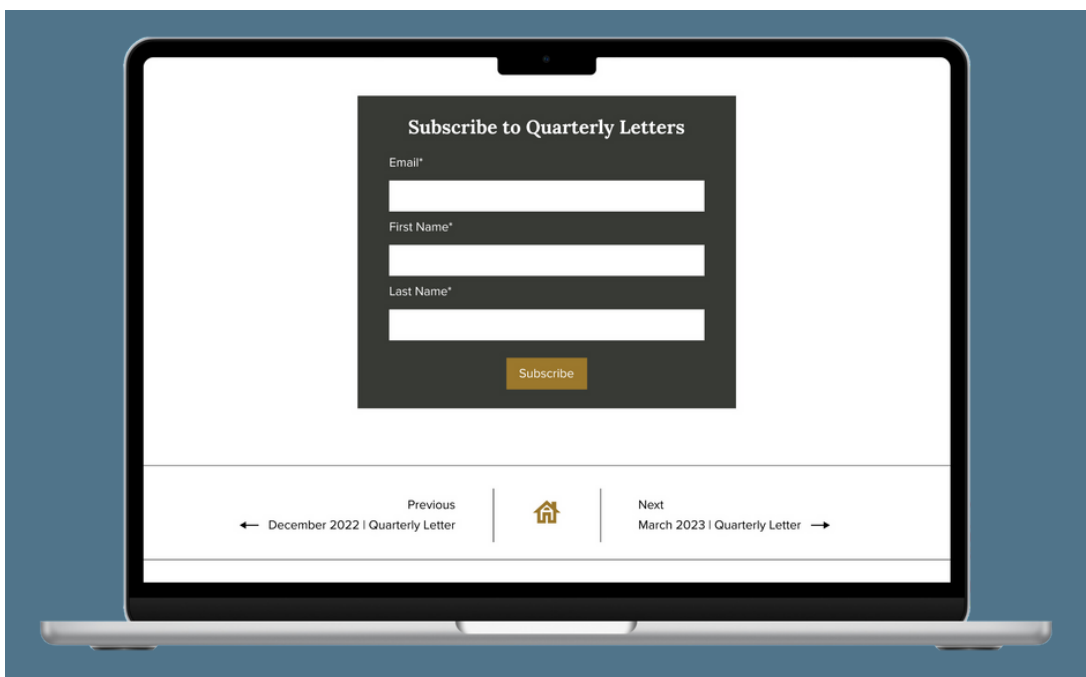
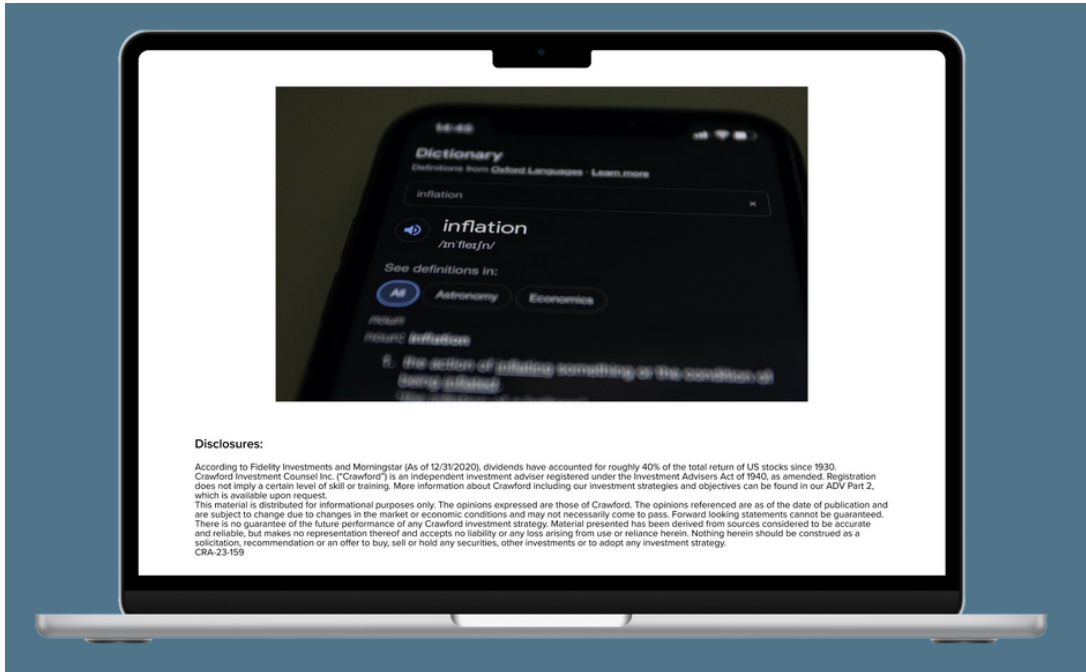


Website Redesign - Quarterly Letters

39

Quarterly Letter Example

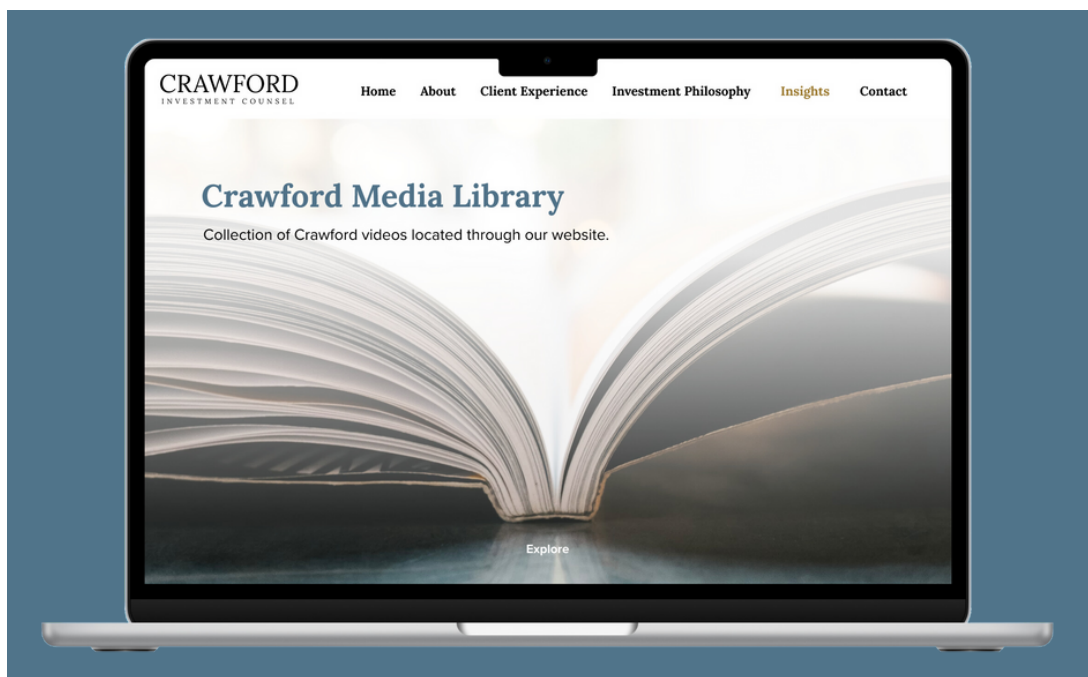
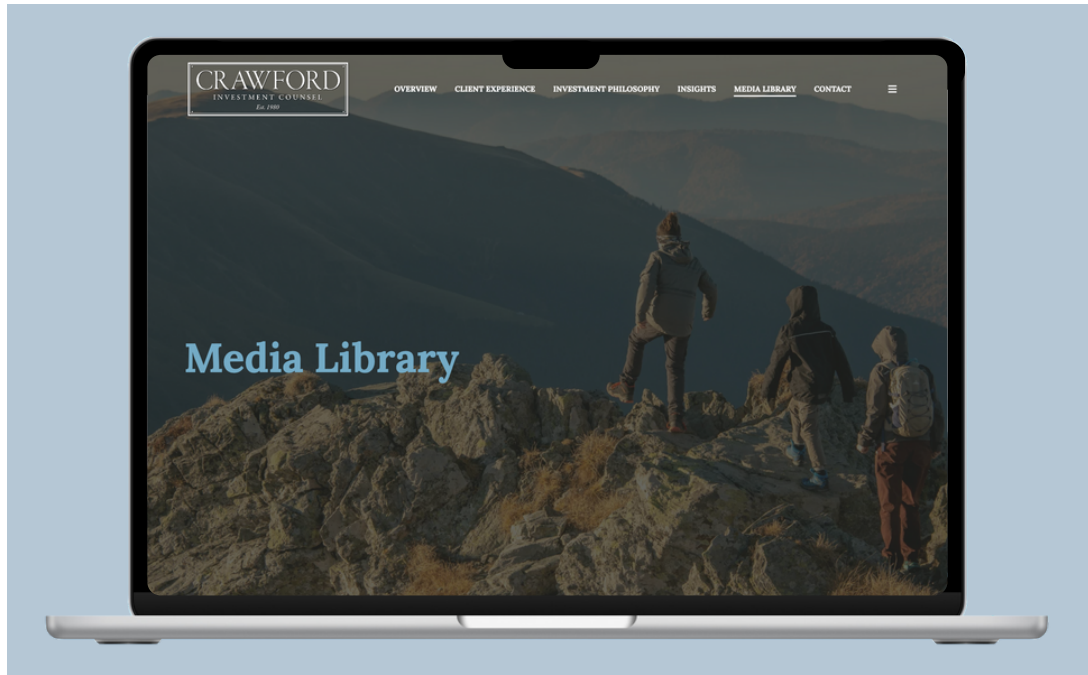
A photo was added for interest and updated the “Subscribe” box and bottom navigation to match the rest of the Insights pages.



Website Redesign - Media Library

40 Media Library

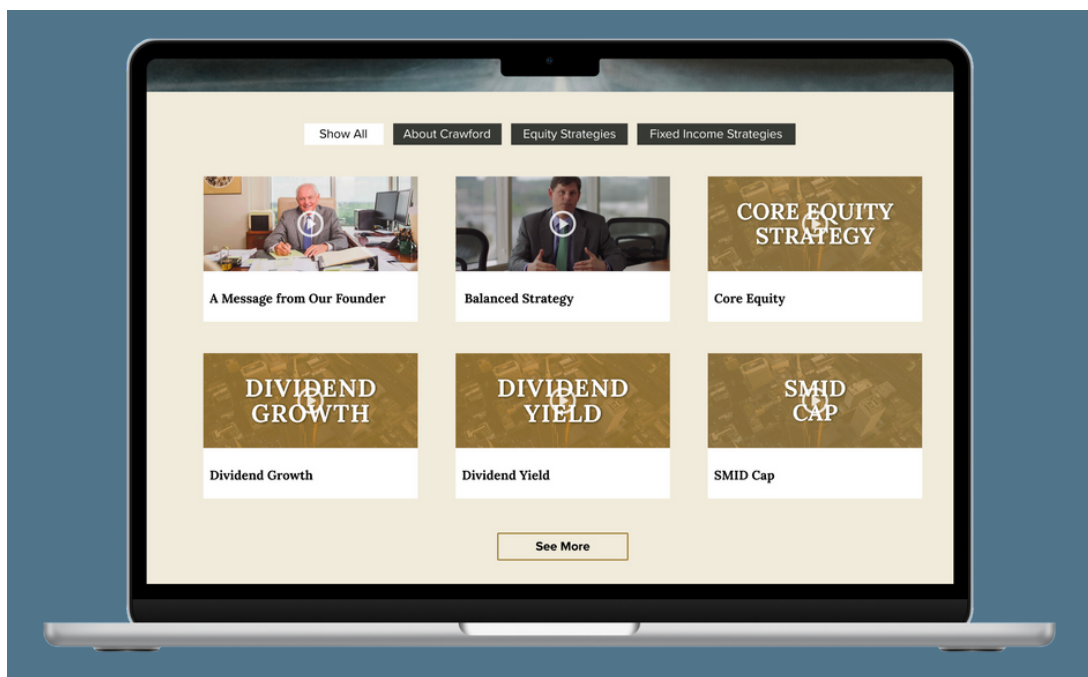
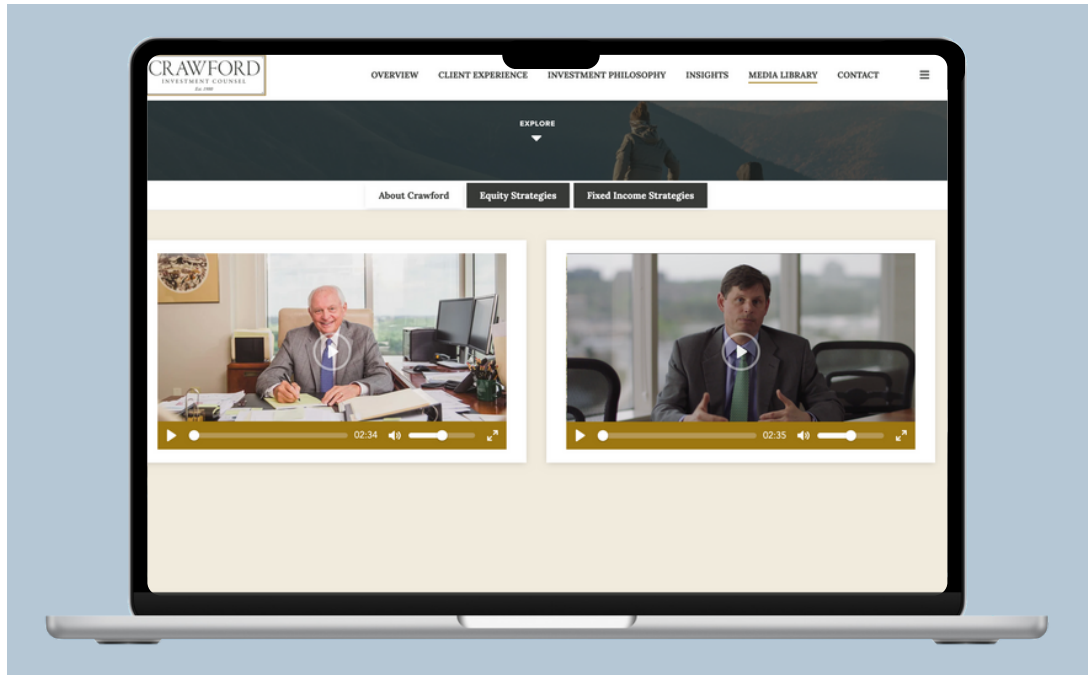
The “Media Library” page was moved under the Insights tab instead of having its own tab. The landing page was also updated to match the same format as the other updated pages.



Website Redesign - Media Library

41 Media Library

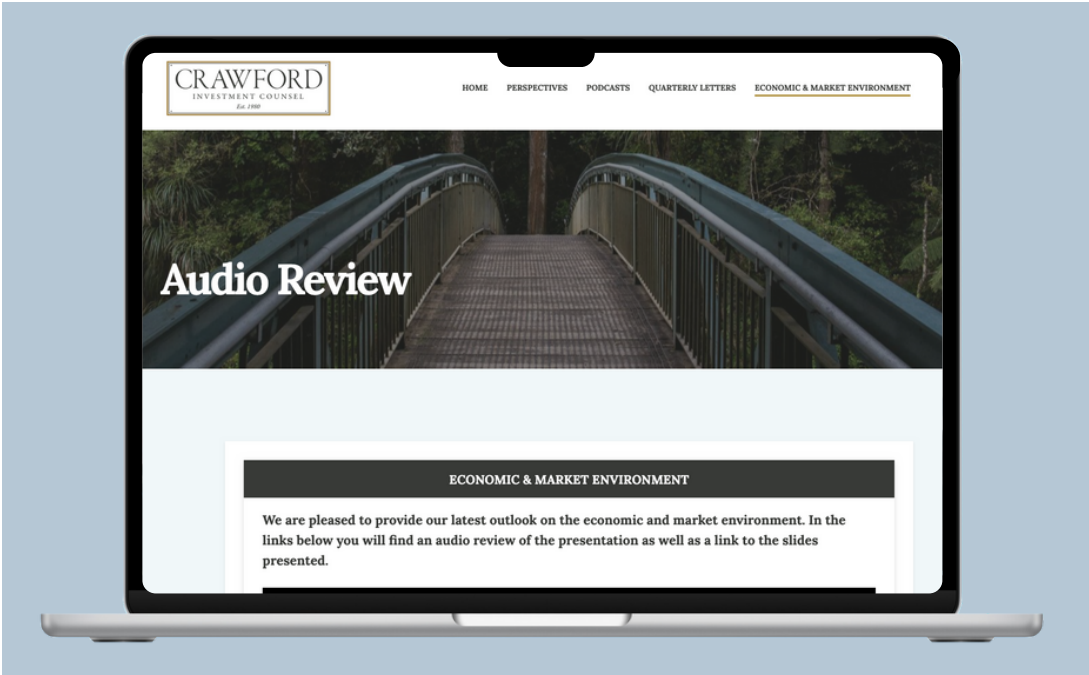
The new layout for the library shows all of the videos at first which can then be filtered down. There was also an added button to see all media at once.



42

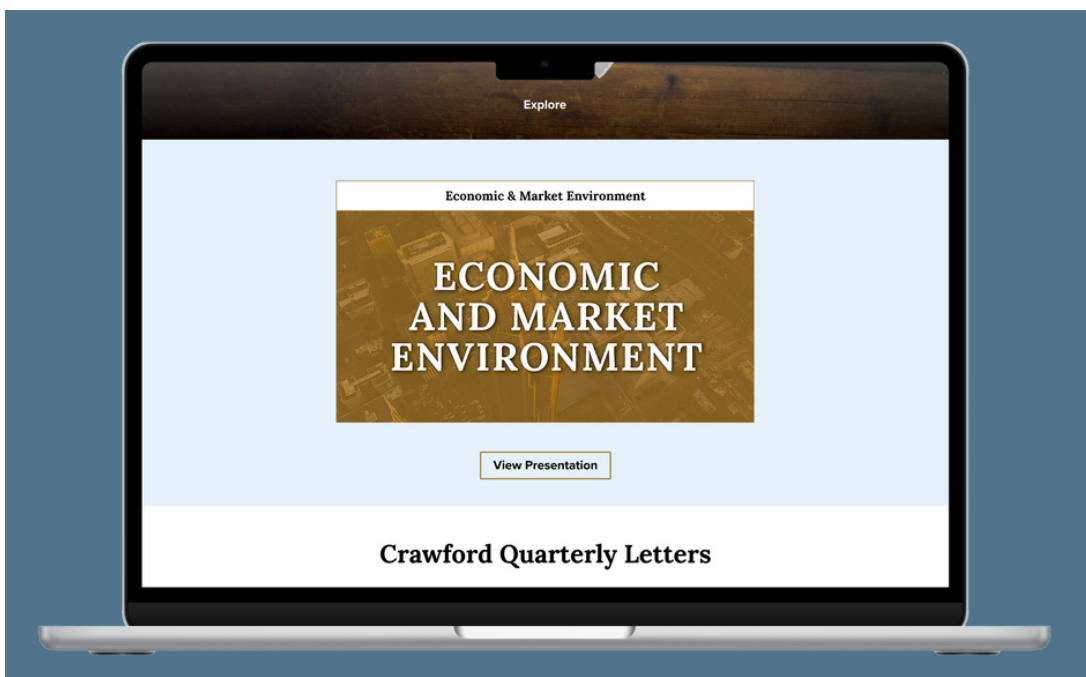
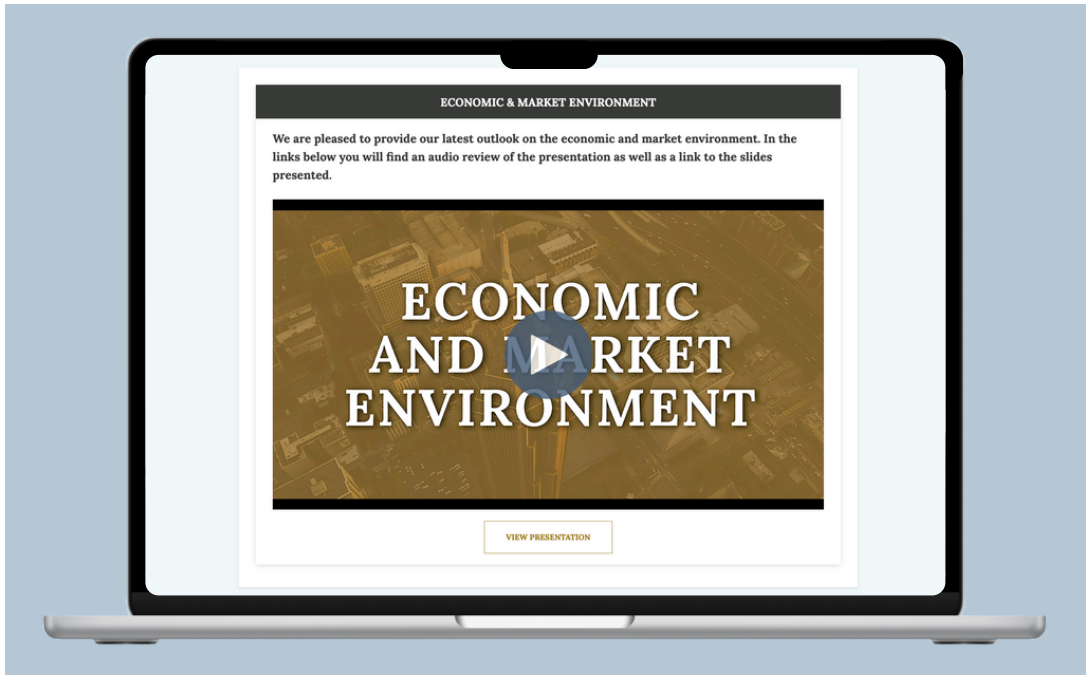
Economic & Market Environment - Audio Review

The landing page was updated to match the new look and feel, and a subtitle was also added.



43 Economic & Market Environment - Audio Review

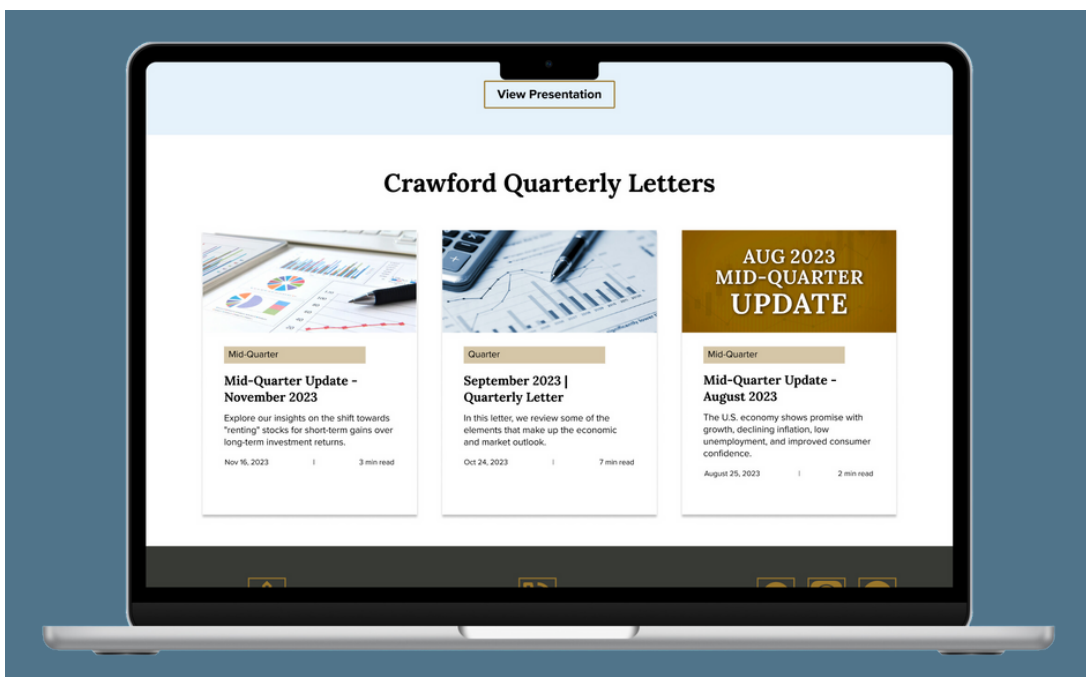
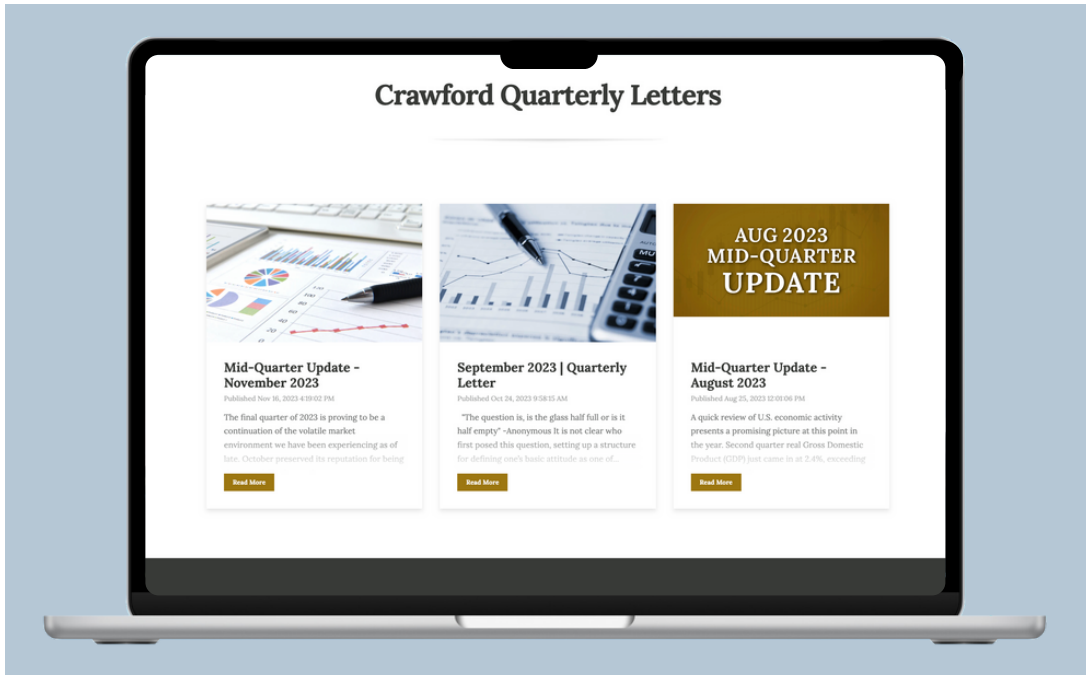
The text was simplified, and there a new button look has been added.



Website Redesign - Economic & Market Environment

44 Economic & Market Environment - Audio Review

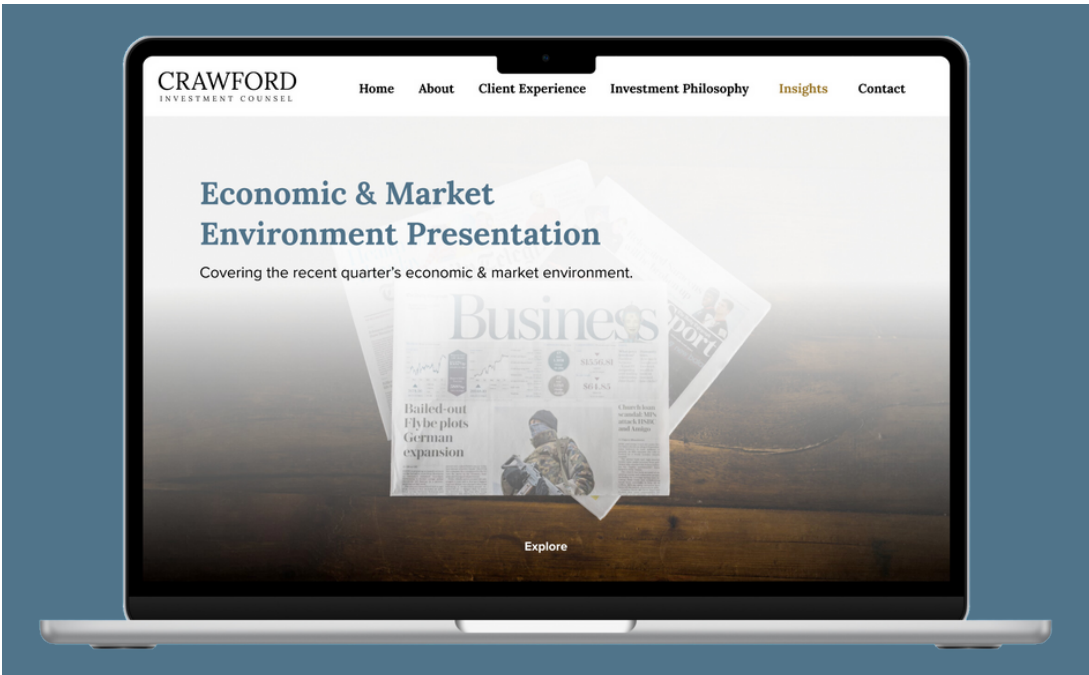
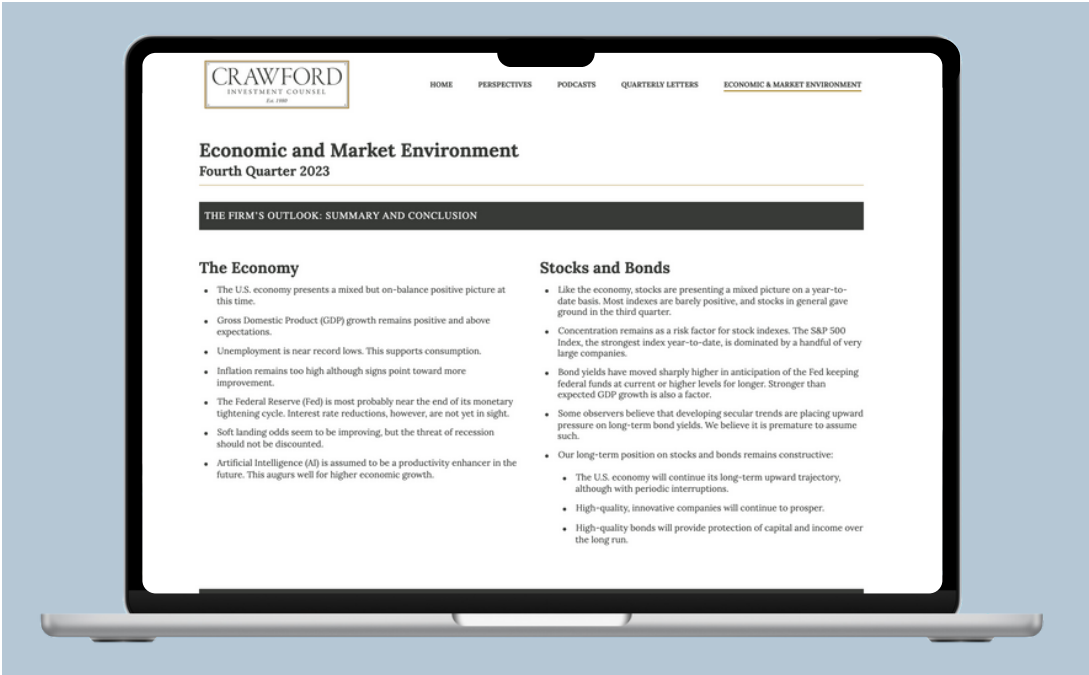
There are new tags indicating when the Quarterly Letters were released. New blurbs were added to summarize the Quarterly letter. The publishing date and read time were stretched over one line instead of two.



45

Economic & Market Environment - Presentation

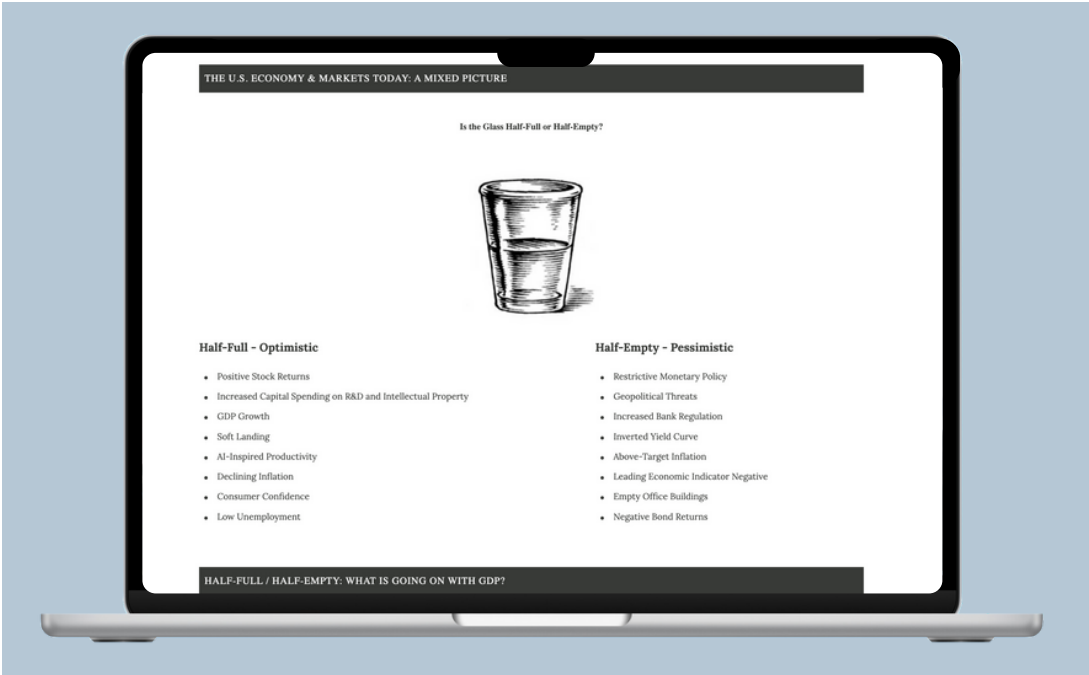
A matching landing page was added.



Website Redesign - Economic & Market Environment

46 Economic & Market Environment - Presentation

Instead of scrolling endlessly through the PDF style layout, the format was changed to be a slideshow for easier access to the information.

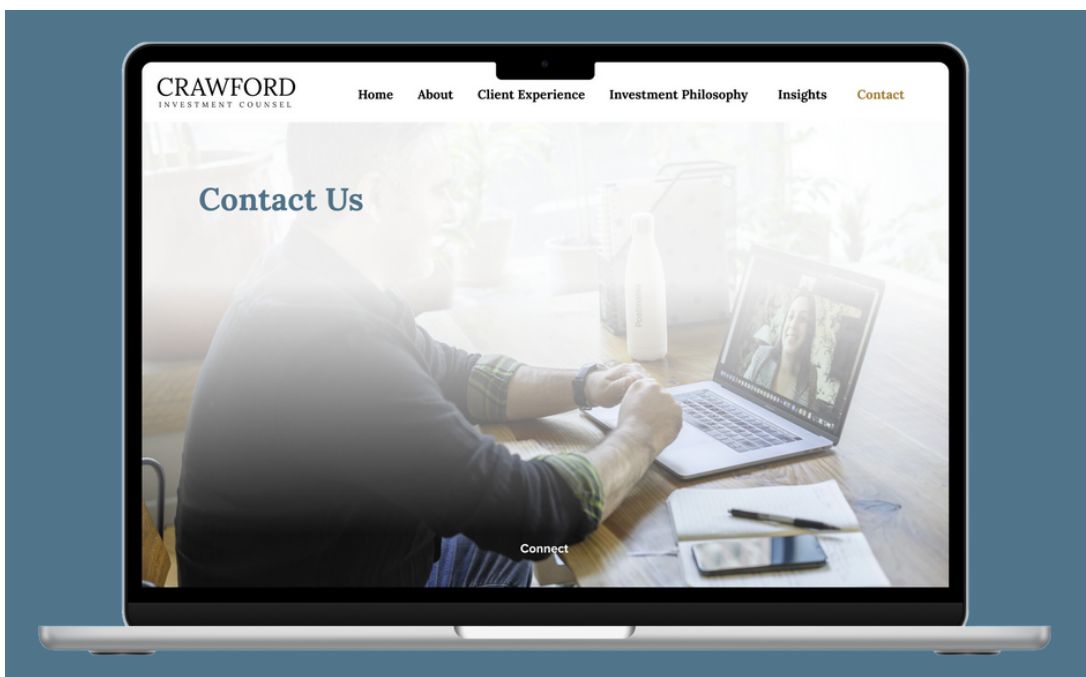


Website Redesign - Contact

47

Contact Us

The landing page was updated to match the new format.

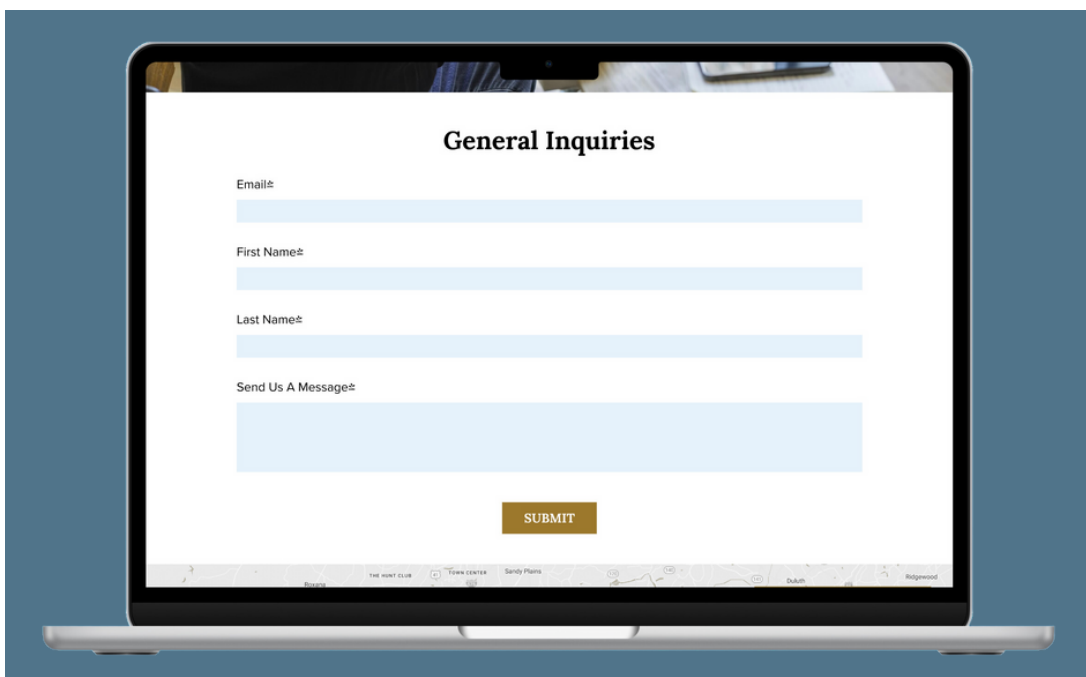
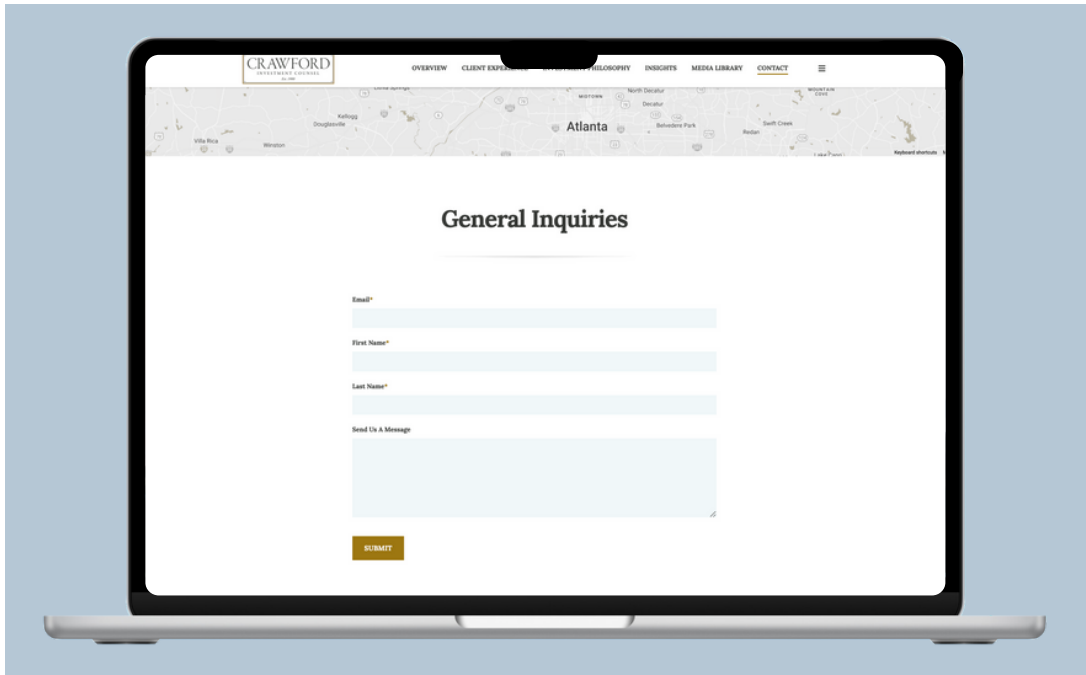


Website Redesign - Contact

48

Contact Us

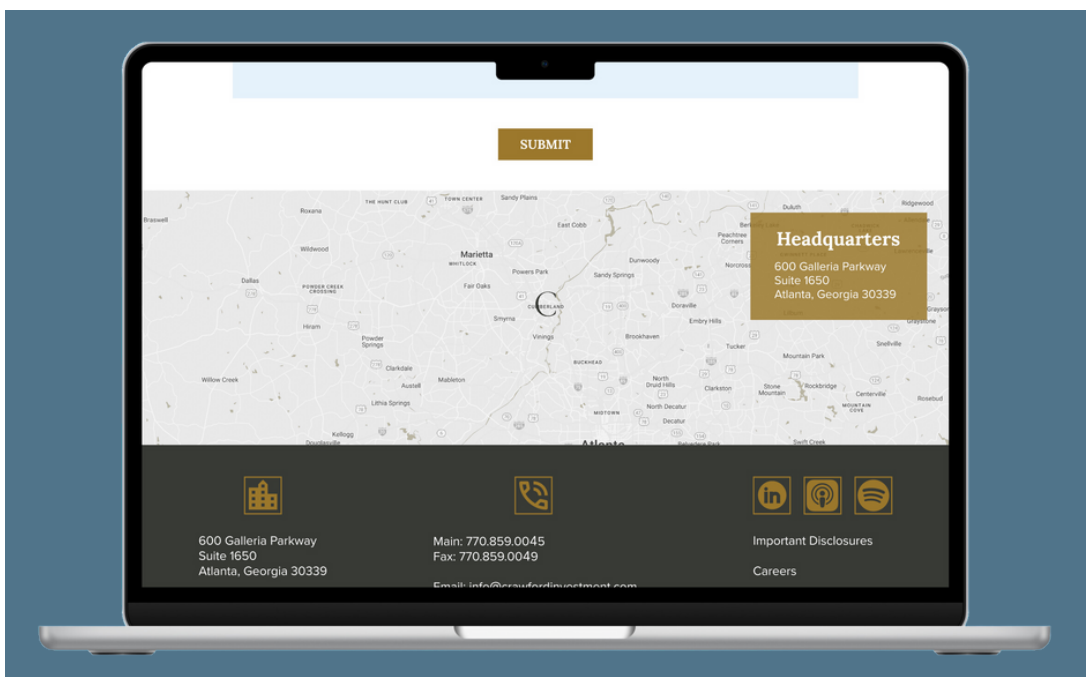
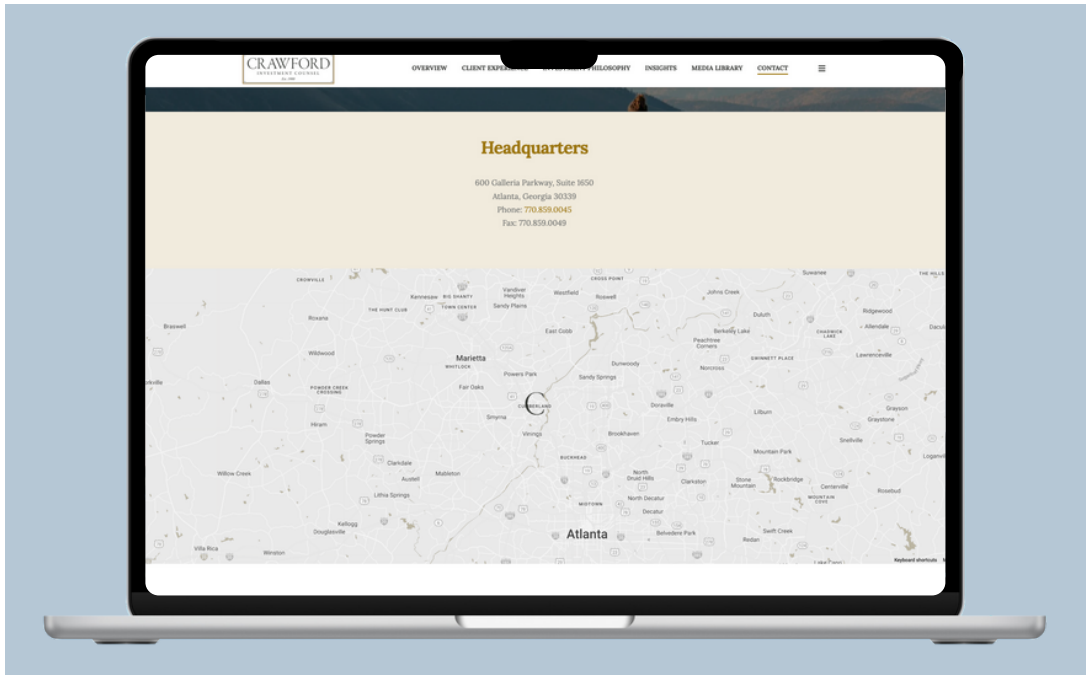
General inquiries were moved towards the top of the page as this form is more important for users.



Website Redesign - Contact

49 Headquarters Location

the address was combined with the map to lessen negative space.



User Testing

To accompany our website redesign, we have researched user testing platforms and compiled a list of potential tasks to be assigned. User testing will provide insights into how users navigate the website and what they think about Crawford's website usability. This data is vital as it can help Crawford to see if their website is easily usable for clients to find necessary information. Both the current Crawford website and the proposed website redesign can be user-tested by people within Crawford's target audience.

To test the current Crawford website, a code snippet must be added to Crawford's website to connect [Maze](#), our chosen user testing platform, and embed live surveys for user feedback. The code snippet and further instructions can be found on their [instruction page](#). Information about user testing a (Figma) prototype can also be found on Maze's website.

We have also created a list of potential tasks and questions to be asked within the user testing study. These tasks and questions can be modified to best fit Crawford's goals for the website.

Tasks

- Perpetual Accumulation Approach:
 - You're in search of an investment management firm, and a trusted friend suggests considering Crawford Investment Counsel. Curious, you ask them what makes Crawford special. They excitedly explain that Crawford has a unique proprietary investment strategy used to help clients achieve their investment goals and successful outcomes. Identify the name of this approach.
- Statistics:
 - What is Crawford Investment Counsel's [client retention rate](#)? (97%)
- Make insights more engaging:
 - Perspectives
 - You are interested in reading more about the origins of Crawford's [dividend growth strategy](#), find out...
 - the old saying used to introduce the story of the origin of the Dividend Growth strategy ("necessity is the motherhood of invention")
 - what year the strategy originated in and by who (1970, John Crawford)
 - Podcasts
 - While stuck in heavy traffic during your commute to work, you decide to tune into one of Crawford's podcasts for a more engaging journey. What area of the market does Crawford believe to be the ultimate "[golden opportunity](#)"? (small cap stocks)
- Navigation - finding the Our Team page
 - You are interested in Crawford's dividend growth strategy, find out who is your portfolio manager. (Jon D. Christiansen)
 - What is the phone number you would use to contact the Portfolio Manager for the Dividend Growth Strategy? ((770) 859-0890)

Questions

- What does Crawford Investment Counsel do?
- What was the most difficult task?
- What was your first impression of the navigation?
- Was the Contact or Firm Overview page where you expected it to be?
- When thinking about Crawford's investment strategy, would information about this proprietary research-based approach be under the Client Experience tab or Investment Philosophy tab?