



LUMERIC™ Project Summaries

Project Type:

Branding Strategy

Sector: Financial Services /
Professional Services

Company Size: \$3B+

Company Position:
Market Leader

Client Level:
CMO

The Critical Decision:

Do the 10+ independent divisions of this firm share enough competitive attributes to create a single, differentiated master brand that would enhance prospects for capturing unrealized cross-selling opportunities?

The Answer:

Yes, each firm shared a strong, differentiated market position based on the high quality of their advise, extensive sector expertise and responsiveness of customer service

The Discussion:

The client was a financial and professional services platform built up over the past 25 years primarily through acquisition. Each division shared a similar base of clients who had little awareness of the full capabilities of the firm as a whole, leaving many opportunities for cross-selling unrealized. The client wanted to explore the potential for unifying the company under once brand in order to capture these lost possibilities.

Lumeric conducted an extensive set of in-depth interviews across the various divisions which determined that each division was viewed in a similar, differentiated position based on high touch service and demonstrated sector expertise. Using these findings, Lumeric developed a unified re-branding approach for the firm, which would effectively broadcast their full capabilities to the market, the firms key differentiators and enhance the competitiveness of each business unit. 