



Ivy Exec Case Study:

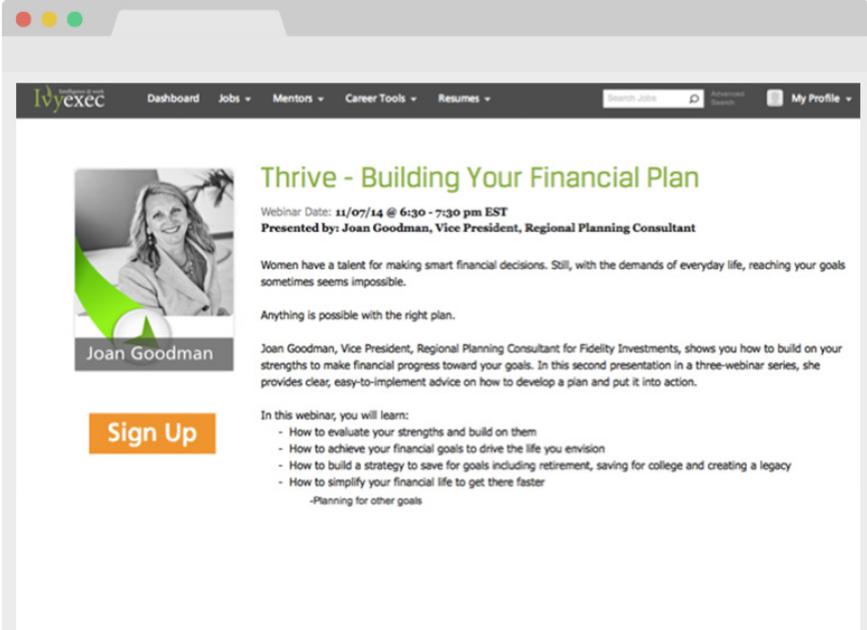
# **How Fidelity Investments Connected With Female Investors While Conducting In-Depth Market Research**

With over 100,000 professional women within Ivy Exec's membership base, our network was an attractive audience for Fidelity Investments, who was seeking to reach women that are high-income, mass-affluent, and financially savvy.

The outcome: A three-part webinar series on financial management, organized by Ivy Exec. The campaign generated 1,307 leads along with priceless market research on how this very important segment approaches its financial health.

## The Challenge

Translate the success of Fidelity's live workshops for professional women into a digital format that would be equally well-received, but reach a broader audience.



The screenshot shows a web browser window displaying the Ivy Exec website. The navigation bar includes links for Dashboard, Jobs, Mentors, Career Tools, and Resumes. The main content area features a webinar registration page for "Thrive - Building Your Financial Plan" presented by Joan Goodman, Vice President, Regional Planning Consultant. The page includes a photo of Joan Goodman, a "Sign Up" button, and a list of topics to be covered in the webinar.

**Ivy Exec** Dashboard Jobs Mentors Career Tools Resumes

**Thrive - Building Your Financial Plan**  
Webinar Date: 11/07/14 @ 6:30 - 7:30 pm EST  
Presented by: Joan Goodman, Vice President, Regional Planning Consultant

Women have a talent for making smart financial decisions. Still, with the demands of everyday life, reaching your goals sometimes seems impossible.

Anything is possible with the right plan.

Joan Goodman, Vice President, Regional Planning Consultant for Fidelity Investments, shows you how to build on your strengths to make financial progress toward your goals. In this second presentation in a three-webinar series, she provides clear, easy-to-implement advice on how to develop a plan and put it into action.

[Sign Up](#)

In this webinar, you will learn:

- How to evaluate your strengths and build on them
- How to achieve your financial goals to drive the life you envision
- How to build a strategy to save for goals including retirement, saving for college and creating a legacy
- How to simplify your financial life to get there faster
- Planning for other goals

## The Approach

**Working in collaboration with Fidelity's content team, Ivy Exec devised a webinar campaign that was delivered through 3 online sessions taking place over the course of four months.**

Ivy Exec took full advantage of its 2 million monthly unique page views to generate sign ups through onsite marketing. This was supplemented with targeted email marketing campaigns and social media to produce a multi-channel, multi-touchpoint marketing campaign.

## Results

In total, the campaign generated 1,307 registrants across three webinars, with an average satisfactory rating of 92% for the quality of the content and expertise of the webinar presenter. The results of the webinar campaign were so successful that Fidelity went on to utilize the same webinar campaign strategy to reach Ivy Exec's Millennial population.



## Ivy Exec

Ivyexec.com is a membership community of 600,000 high caliber professionals seeking professional and personal advancement. Our members possess power, influence, and potential. Through partnerships with top institutions globally we provide avenues for select partner organizations and businesses to market their offerings to our community. To learn more, contact Gayle Rigione, Director of Strategic Development at Ivy Exec via email ([gayle@ivyexec.com](mailto:gayle@ivyexec.com)) or by phone (646-217-0746).

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