

Stadion Strategic Messaging Framework

October 2025



Executive Summary

Research Intent

Overall, our research concluded that Stadion is a trustworthy and compliant player in the financial, fintech, and retirement solutions industries. Yet, their current messaging lacks human and relational strengths. Stadion's emphasis on regulatory expertise and management reflects reliability, but the heavy use of financial jargon and formal tones creates distance from users seeking understanding.

Key Findings

Strengths



Clear expertise

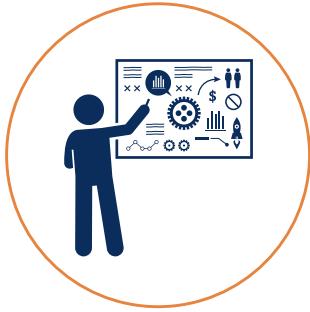


Longstanding credibility



Centered on trust and compliance

Weaknesses



Overly technical language



Weak CTA's



Minimal Storytelling

Research Intent

Research Intent

This research aims to evaluate and refine Stadion Money Management's current website to enhance its communication with its audience effectively. The overall goal is to ensure that the messaging on the site communicates the brand's value proposition, differentiators, and human-centered approach. Stadion's current digital presence on its site demonstrates strength in value, trust, and compliance, but lacks clarity, emotional resonance, and accessibility for non-expert users.

Our goals

- Identify how Stadion's current messaging performs in communicating brand trust and relevance to its audiences - plan sponsors, advisors, and participants.
- Analyze competitor strategies to gain insights on clarity, tone, and overall engagement.
- Gather internal and external perspectives to understand perceived strengths and weaknesses.

Overall, this research intends to frame Stadion as a professional, user-centered brand that builds trust while also simplifying complex financial and technology concepts.

 Stadion

Brand Foundation

October 2025

Brand Foundation

Purpose:

Stadion's goal is to help retirement plan participants feel secure in their financial future. Stadion provides technology and investment strategies for plan sponsors, advisors, and participants.

The deeper purpose is to **enable confidence in financial futures.**

From Stadion's site, the focus is primarily on institutional compliance, rooting the company in reliability rather than accessibility. The goal here is to position Stadion with confidence, clarity, and the best resources for connection.

Vision:

“Custom solutions for retirement plan advisors, plans, and participants.”

With this value statement in mind, it is clear that Stadion is building resources to help everyone get connected and achieve trusted, transparent retirement solutions – we want to **build** off of this.

Brand Foundation

Values:

- Based on messaging patterns and brand tone, Stadions' values include: **trust**, **compliance**, and **partnership**.
- Stadion differentiates itself by leaning into the stability and strong partnerships it has to offer, which are extremely valuable but undercommunicated.

Trust: grounded in decades of compliance and expertise.

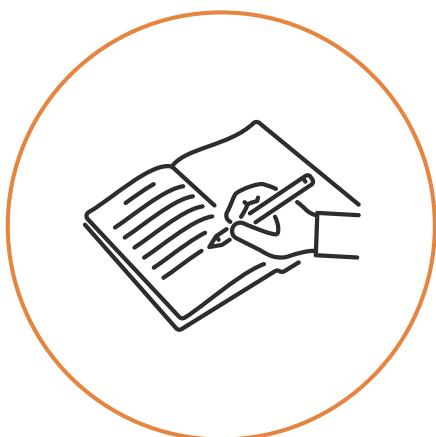
Compliance: promoting trustworthy, reliable services.

Partnership: partnering with client's to connect them to the best fitting service.

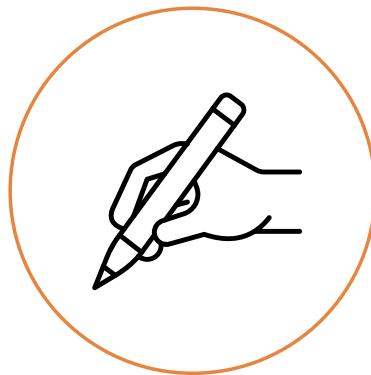
Brand Foundation

Voice:

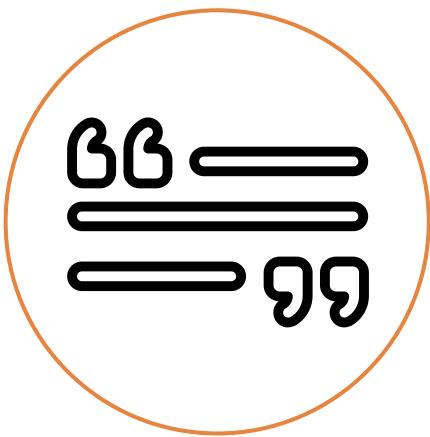
- The overall site presents a formal and corporate tone, which can easily alienate the everyday, non-expert, participant from understanding.
- We want to shift tone to → knowledgable yet approachable by:



Avoiding
jargon



Using plain
language



Keep sentences
concise and
benefit-oriented

 Stadion

Audience Insights

October 2025

Audience Insights

Primary Personas:

- **Plan Sponsors**

- Plan sponsors want confidence that Stadion is a benefit to their employees and confidence that the partnership will be compatible.

- **Recordkeeper Partners & Advisors**

- Recordkeepers and advisors want the value ease of administration, compliance, and trust above all.
- They are looking to connect to the right sales person, see credibility signals, and quickly assess Stadion's offerings at a high level.

- **Participants**

- Participants value clarity and simplicity, they are looking to understand WHO is managing their money and visit the site to validate Stadion's legitimacy.

Industry pain points



Lack of trust



Confusion in financial terminology



Overload of overwhelming information

Audience Insights

Emotional Drivers:

Emotional drivers such as trust and confidence drive financial decisions more than logic.

We want to:

Establish trust.

Provide relief.

Create confidence.

Barriers and objectives:

High amounts of overwhelming jargon and overall distrust of financial institutions and providers. They alienate non-experts.

Unclear CTA's fail to move users down the funnel of the site.

Recommendation:

- Simplifying copy - using financial terms but in a clear, concise manner.
- Adding more proof of legitimacy and reliability
 - client & partner logos, testimonials, results.
- Using transparent CTAs
 - “Get in touch with our team”
 - “Talk with our team”
 - “Reach out to learn more”

Audience-Specific Messaging Strategy

Overview

To create a cohesive yet audience-tailored experience, each page of Stadion's website should deliver messaging catered to each target audience's familiarity with the financial industry and what they most care about. Stadion's brand voice should be consistent yet flex slightly based on these audiences for each service tab.

1. Participants

Audience Mindset: Based on user research, we know that personal investors can feel intimidated by financial jargon. Their main intent of visiting Stadion's website is to seek reassurance that their money is being given to a credible partner with their best interests in mind.

Recommendations: Stadion should make complex financial concepts approachable without sacrificing credibility. Align messaging with the participant audience by simplifying tone, guiding the reader visually, and reducing wordyness and financial jargon. Frame explanations based on what it means for the user, not how the fund functions technically.

What to Emphasize:

- Clarity & simplicity
- Confidence
- Trust & transparency

Tone and Structure:

- Conversational, educational
- Minimal complex information
- Highlight real people & testimonials

Audience-Specific Messaging Strategy

Key Improvements to TargetFit: Participants

1. Reduced Financial Jargon

- Simplified dense terminology (“equity allocation,” “glide path”) into clear, everyday language.
- Reframed explanations of what it means for the user, and removed long chains of text on how the fund functions.
- Example: replacing “rebalances over time to become less focused on potential growth” with “adjusts automatically to help you save confidently as you near retirement.”

2. Simplified Visual Hierarchy & Tone

- Design uses whitespace to reduce cognitive load and mirror the clarity & simplicity brand pillar.
- Shifted tone from instructional to reassuring, focusing on peace of mind, progress, and trust.

3. Improved Narrative Flow

- Reordered content from education → choice → action to understanding → selecting risk tolerance → viewing glide paths
- Rewrote risk tolerance descriptions from analytical (“a moderate investor allocates 60% in equity”) to relatable (“doesn’t mind taking some risks with their savings”).
- Added CTAs like “Select your risk tolerance” on infographic to learn more about TargetFit personalizes the website experience.

Audience-Specific Messaging Strategy

2. Advisors/Financial Professionals

Audience Mindset: Advisors already understand investment management, so they care about reliability, compliance, and customization options/differentiation that help them serve clients efficiently.

Recommendations: Stadion should use benefit-oriented headlines that lead with outcomes, maintain a consultative voice, and integrate advisor testimonials or partner spotlights to reinforce trust. Messaging can be revised to move away from institutional formality toward a solutions-oriented tone that acknowledges advisors' expertise while emphasizing partnership, adaptability, and scalability.

What to Emphasize:

- Ease of administration
- Partnership and flexibility
- Credibility and results

Tone and Structure:

- Professional yet conversational
- Speak to expertise while avoiding unnecessary jargon
- Focus on collaboration

Key Improvements to Target Date Solution: Advisors

1. Advisor-Centric Narrative

- Shifted focus from explaining what Stadion does to highlighting how advisors benefit.
- Present Stadion as amplifying advisor success, not just a provider.

Audience-Specific Messaging Strategy

Key Improvements to Target Date Solution: Advisors

2. Simplified Messaging & Highlighted Differentiations

- Clarified product differentiators in bullets for easy scanning
- More subheadings to guide eye to shorter paragraphs of information
 - Added relatable subheadings: “Why the one-size-fits-all model isn’t working anymore”
- Added subtitle to front of page that changes tone from a product Stadion is selling to a partnership: “Solutions for your business model” → “Deliver tailored retirement solutions that reflect your strategy, support your fiduciary role, and create value for advisors, plan sponsors, and participants”

3. Included Relevant Information

- Compared to participants, the advisor's TargetFit page includes more information
 - Participants were led directly to a contact page
- Removed unnecessary explanations, guided eye to PDF downloads for more information
- Stronger CTAs

4. Simplified Glide Path Infographic

- Simplified glide path infographic cards as advisors are knowledgeable on risk tolerance definitions

Audience-Specific Messaging Strategy

3. Institutions

Audience Mindset: Institutions are focused on scalability, compliance, and participant outcomes that reflect well on their business. They want assurance that Stadion is a dependable partner who can move quickly and adapt to their needs.

Recommendations: Stadion should emphasize flexibility and integration, along with featuring partnerships for enterprise clients through future case studies or data visualizations showing implementation speed, cost reduction, or improved participant engagement. Present Stadion as tech-forward through messaging.

What to Emphasize:

- Operational Efficiency
- Scalability & Partnership
- Proof of Performance

Tone and Structure:

- Confident, data-backed, tech-forward, and B2B focused
- Concise, technical language with strategic insight

Key Improvements to Connect & About Pages: Institutions

1. Scalability and Business-Oriented Tagline

- Quickly explains what Stadion Connect is and why it matters
- Highlights proprietary middleware, scalability, and personalization (keywords tied to growth and innovation)
 - Old technology page buried this information in long paragraphs

Audience-Specific Messaging Strategy

Key Improvements to Connect & About Pages: Institutions

2. Highlighted Partnerships

- Partnerships are highlighted in a carousel, allowing potential enterprise clients to feel that Stadion is a credible solution similar firms are using
- Short page of information directs reader to what's most important: 30 years of experience and trusted partnerships

Trusted by the industry

With over 30 years of experience and partnerships across the retirement industry, Stadion delivers trustworthy results you can rely on.



Lincoln
Financial

OE

BlackRock

THE·PAAK

Ephcient®



TOOGETHER

3. Benefit-Focused Structure and Subheadings

- Organized body into functional benefits (data flow, scalability, integration) → business outcomes (speed, flexibility, participant-centric experience)
- Short, condensed bullets on Stadion Connect's benefits encourage reader to follow the next step on the page (CTA)

4. Strong CTA to direct institutions to talk to Stadion

- Stadion Connect is best explained through speaking with a representative. Because of its complexity, information is best shared through a deck, and a strong, large CTA on the screen directs the institution to the next best step to learn more

 Stadion

Messaging Hierarchy

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Messaging Hierarchy

Purpose

The messaging hierarchy is a basis for Stadion's brand communication. It will help us ensure that all content from headlines to CTAs work together in a consistent, aligned manner. This messaging hierarchy will help establish clarity from the overarching brand narrative, down to the products and offerings. It will aid in preventing confusion and helping ensure communication is aligned across the board. The key questions asked here are:

- **Who** is Stadion?
- **What** do they offer?
- **Why** does Stadion matter?

Master narrative & value proposition

Currently, the master narrative and value proposition overlap, but they don't necessarily connect. One is emotional (using "we're with you for the long run"), and the other is rational ("custom solutions"). The goal is to tie them together into a cohesive layered message. We propose adding a tagline or connector to bridge the two with both emotion and clarity.

Messaging Hierarchy

Pillars

Pillar 1: Trust, Compliance, & Customization

- Trust, compliance, and customization are the core differentiators of Stadion. The legitimacy of these is proved through longevity and Stadion's regulatory expertise.

Pillar 2: Clarity and Simplicity

- This pillar serves to solve user pain points. It will help in ensuring that Stadion's content and messaging is professional, yet clear.

Pillar 3: Partnership and Support

- This pillar emotionally connects Stadion to its clients, further differentiating itself from other tech-first competitors.

Supporting Messages

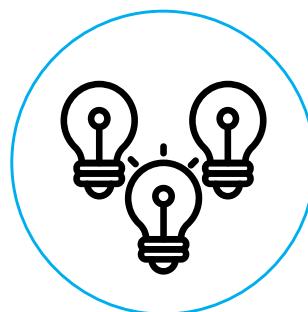
Implementing more of each of these elements will aid in supporting the pillars above.



Statistics



Customer
testimonials



Key
differentiators

Messaging Hierarchy

Supporting Messages by Pillar

Pillar	Supporting Message Types	Examples
Trust, Compliance, & Customization	Proof of longevity, regulatory expertise, and adaptability	“30 years of experience,” “Customized to every participant,” “#1 ranked in _____”
Clarity & Simplicity	Visual explanations, infographics and clear, relevant CTAs	Interactive glide path visuals, plain-language video explanations, clear next steps
Partnership & Support	Testimonials, case studies, and employee spotlights	Advisor success stories, institutional partner outcomes, client quotes on service responsiveness

Audience Messaging

Audience	Primary Messaging Focus	Tone
Participants / Personal Investors	Clarity & Confidence: “Investing made simple and secure.”	Reassuring, educational, limited jargon
Advisors / Financial Professionals	Partnership & Amplification: “Solutions built for the way you advise”	Consultative, collaborative, and benefit-driven
Institutions	Scale & Innovation: “Technology that connects, scales, and differentiates”	Data-driven, confident, visionary

Headline & Call-To-Action Framework

Purpose

Headlines and calls-to-action (CTAs) serve as Stadion's first and final touchpoints with users across its site. Each should instantly communicate value, reinforce trust, and guide users toward engagement. This framework ensures consistency on how Stadion comes across in these touchpoints.

Headlines

Each headline should tie directly to Stadion's brand pillars while reflecting the tone needed for each audience. They should also quickly explain what each page is about for those trying to find what they are looking for.

Headlines should include the product or page name, an action or outcome, and an audience benefit. For example,

TargetFit: “TargetFit” “One retirement timeline. Three personalized paths.”

Turnkey Managed Account Strategies: “StoryLine” “Personalized investment solutions designed to help improve retirement outcomes”

Call-To-Actions

CTAs across Stadion's redesigned site now reflect the following guiding principles: simple verbs, clear benefit, and a confident invitation to engage. Ask questions, explain what they can expect from connecting with a representative, and clearly communicate what the benefit of “clicking the button” is for them.

Call-To-Action Examples

**Are you ready to
explore the
differences
StoryLine can make?**

Let's talk about how your business can leverage turkey-managed account services to enhance participant outcomes and support your growth

[Get Started](#)



Ready to power your retirement offering with Stadion Connect?

Streamline integration, scale faster, and deliver a tailored participant experience with Stadion Connect

[TALK WITH OUR TEAM ON HOW TO GET STARTED](#)

Partner with Stadion

Go beyond age-based investing with a retirement solution designed to fit individual participants and find out how TargetFit can support your plans' needs

[Connect with us](#)

[Read our TargetFit PDF Fact Sheet](#)



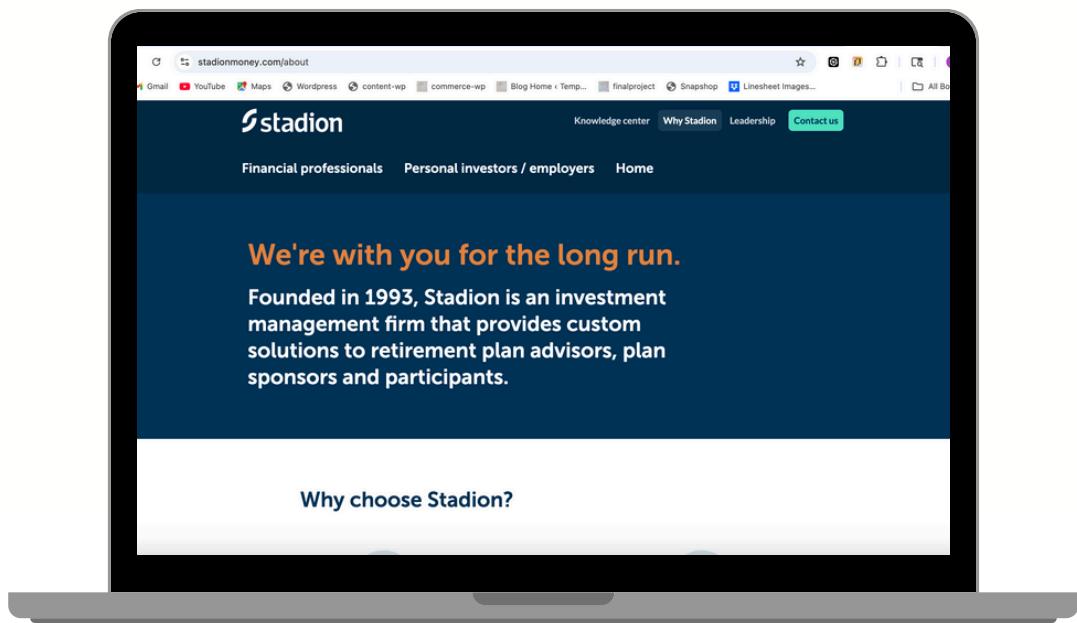
 Stadion

Website Application

October 2025

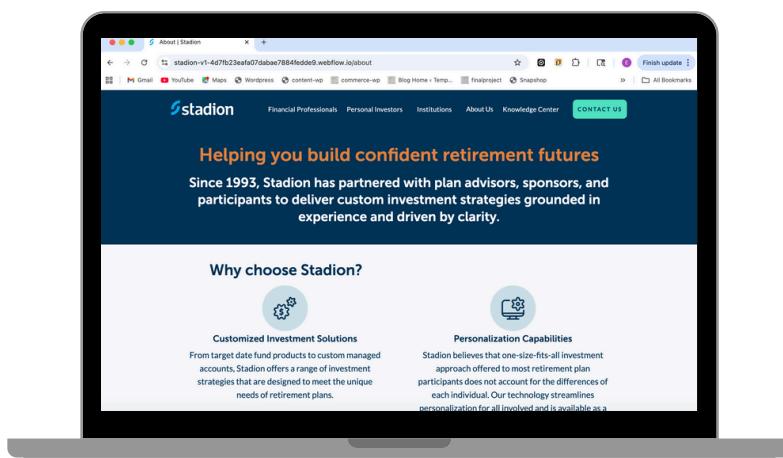
Website Application

About Current



Proposed

- Partnership Carousel.
- Shortened page to direct users attention to the emphasis of credibility and history immediately.

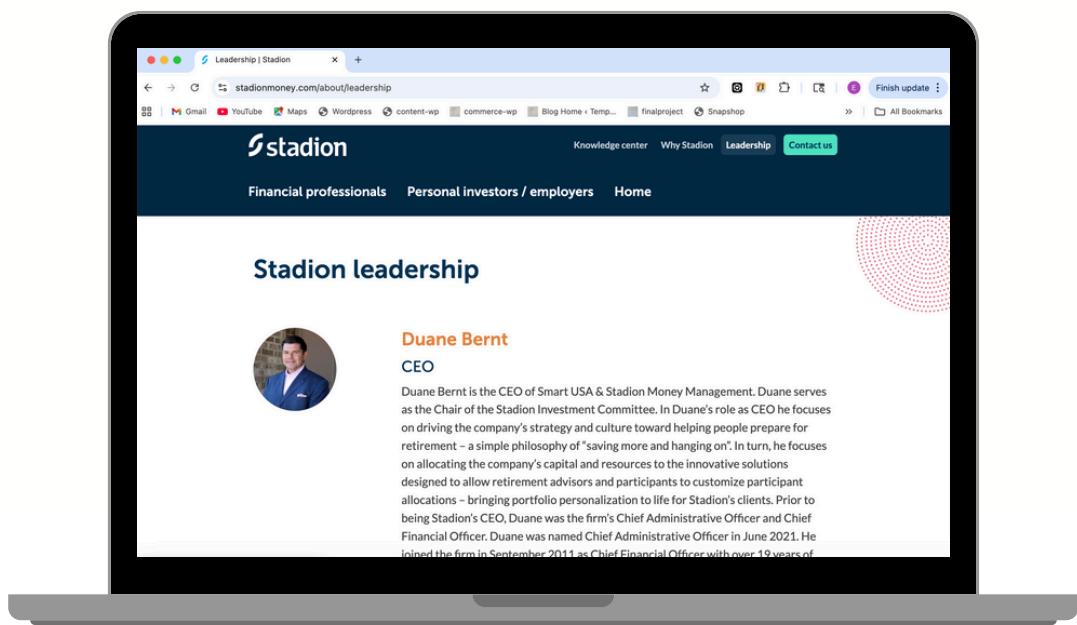


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Website Application

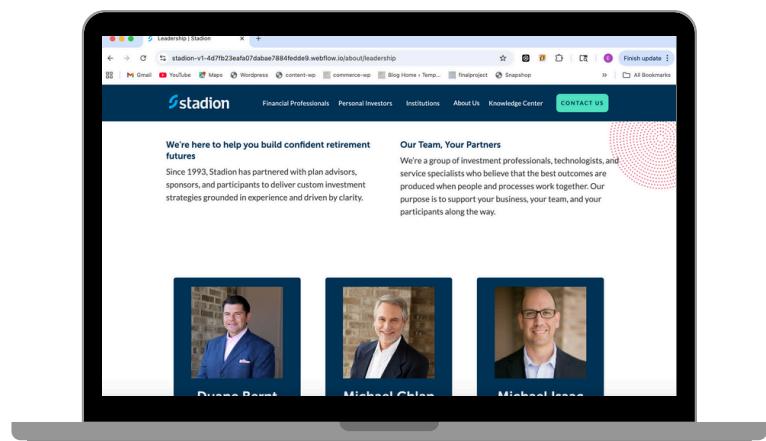
Leadership

Current



Proposed

- Updated CTA's
- Addition of taglines such as "Our Team, Your Partners" and "We're here to help you build confident retirement futures".
- Implementation of introduction blocks that take users to each employees page.

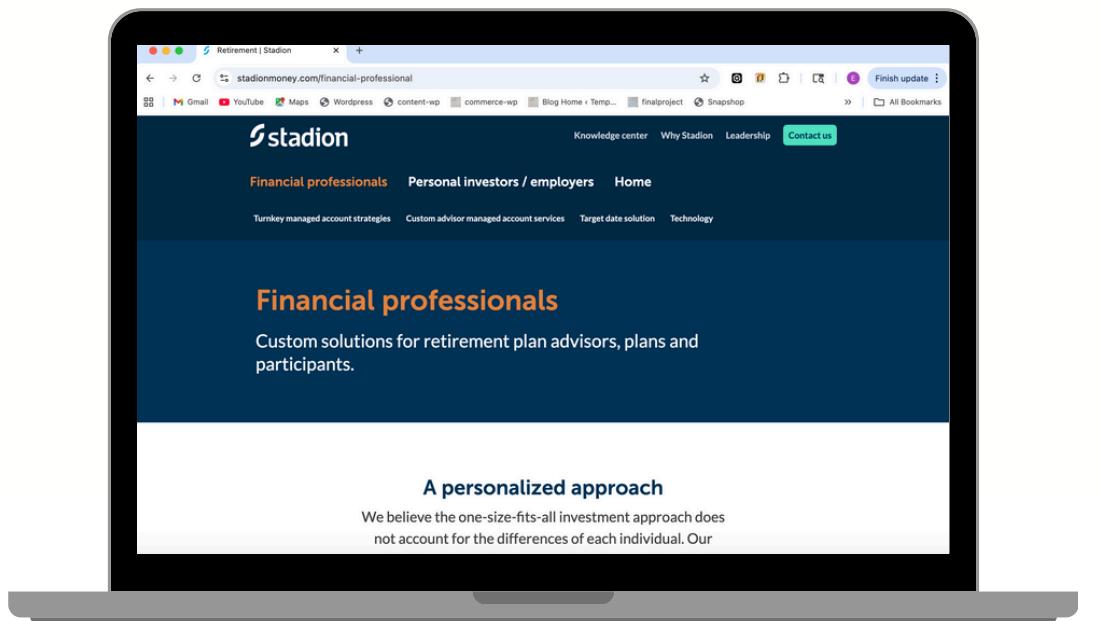


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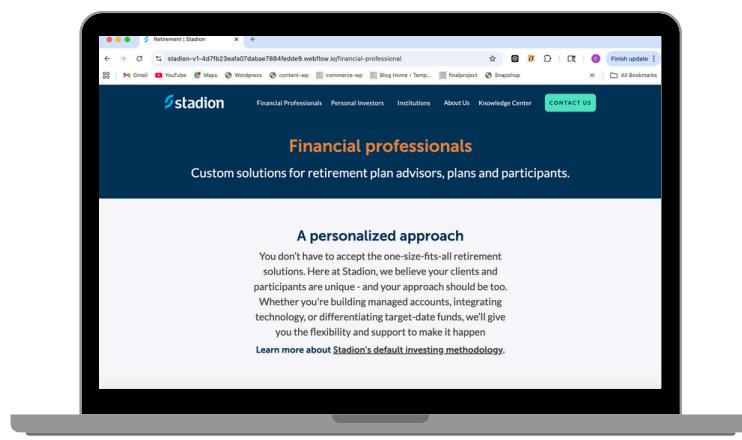
Financial Professionals

Current



Proposed

- Shifted the overall narrative to how advisors benefit.
- Addition of subheadings to guide user to shorter paragraphs.
- Changed the overall tone from selling a service to cultivating a partnership.

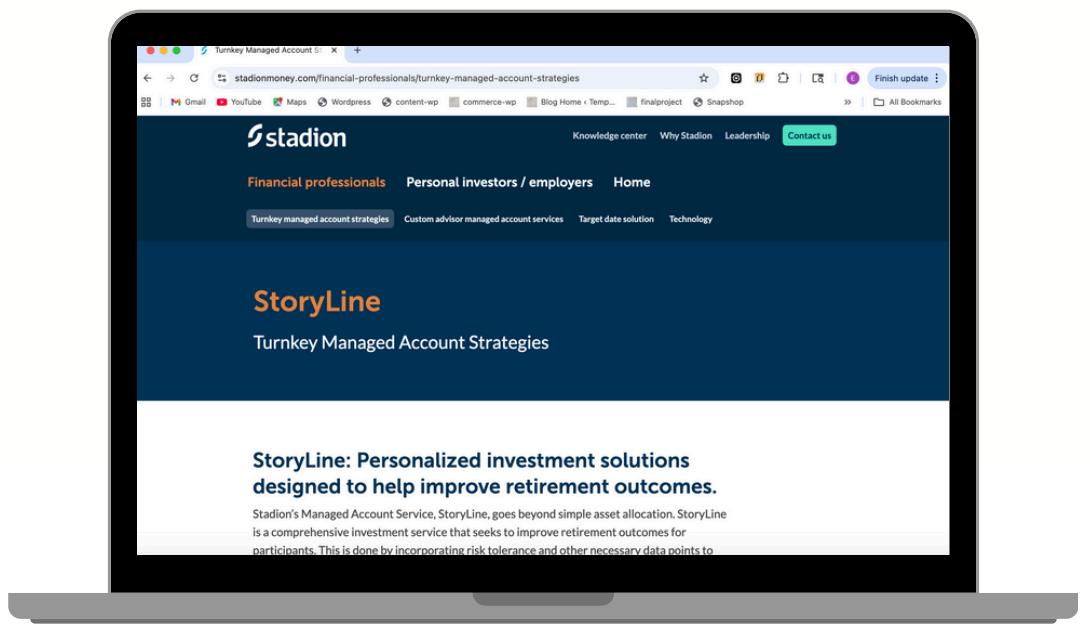


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Website Application

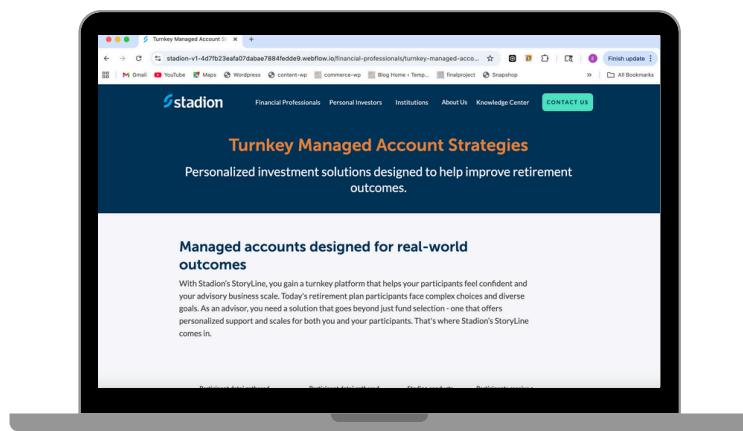
Turnkey Managed Account Strategies

Current



Proposed

- Updated the subheading and introduction.
- Highlighted advisor-benefits by simplifying messaging.
- Updated the footer and CTA.

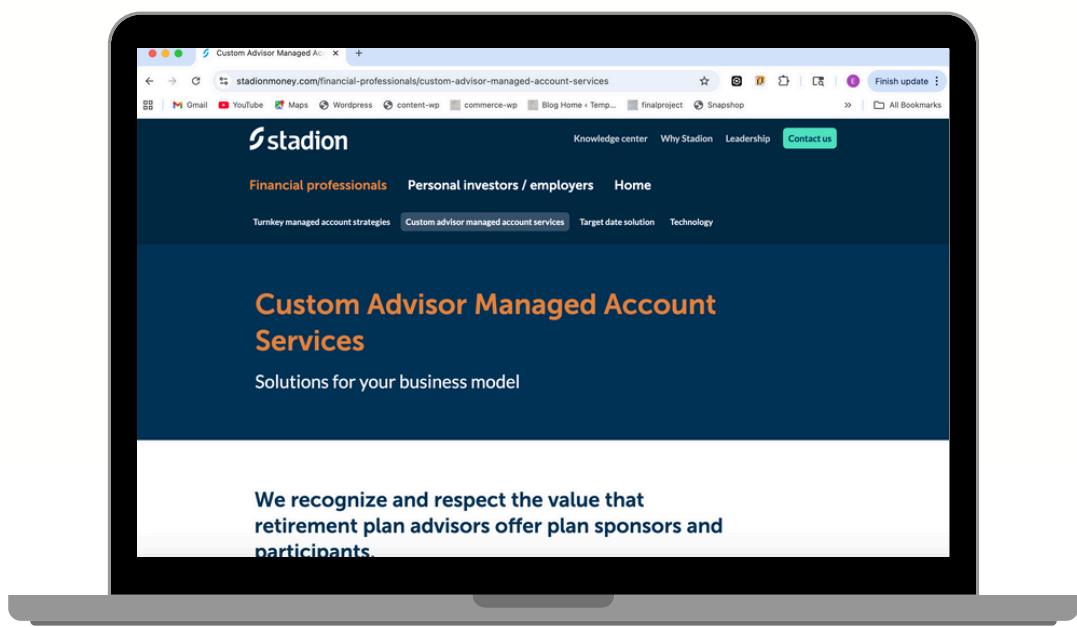


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Website Application

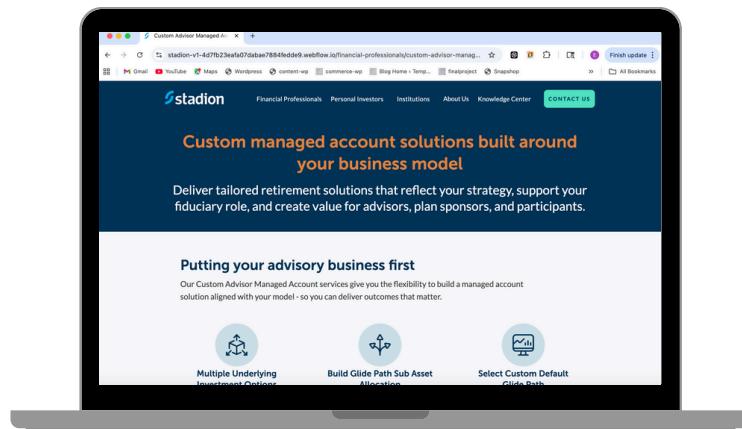
Custom Advisor Managed Account Services

Current



Proposed

- Updated the heading and subheading to emphasize benefits.
- Simplified messaging to direct users to the benefits in a more efficient manor.

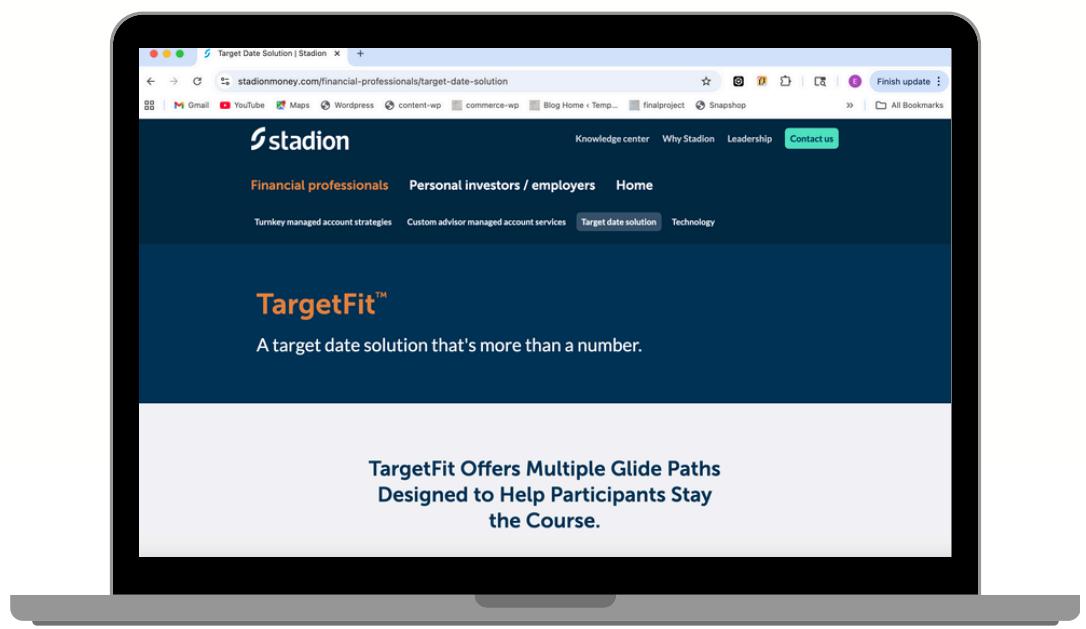


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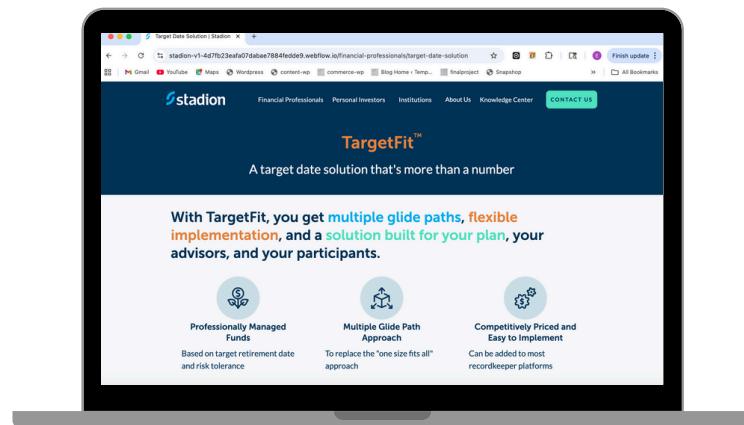
Target Date Solutions

Current



Proposed

- Highlighted differentiators in subtitle.
- Shortened the Glide Path blocks to highlight the main benefits of each path concisely.

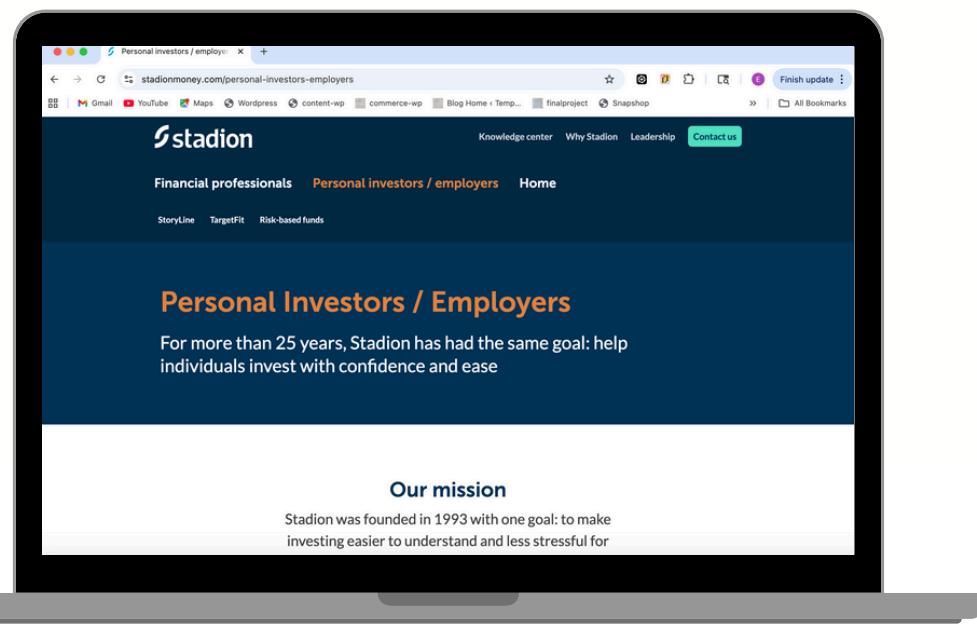


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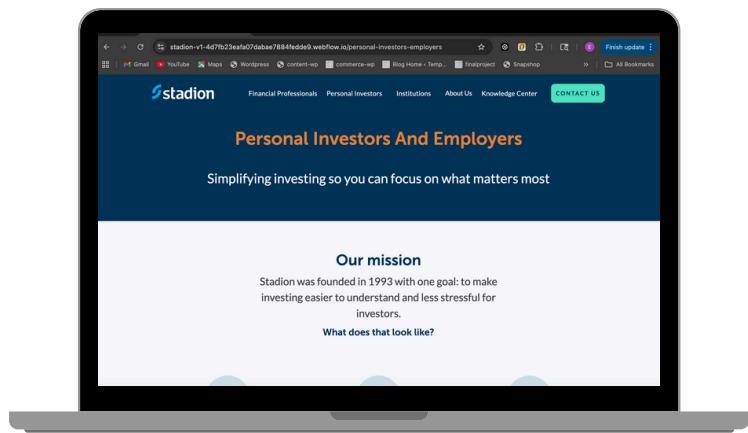
Personal Investors

Current



Proposed

- Simplified the heading and subheading.
- Eliminated excess text to explain goals in a more concise manner.

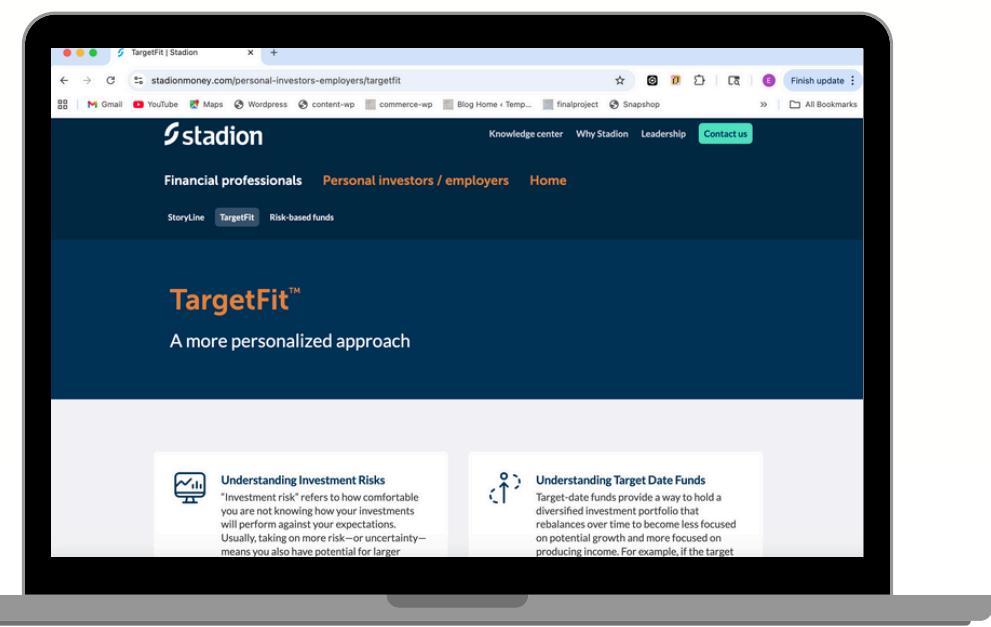


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Website Application

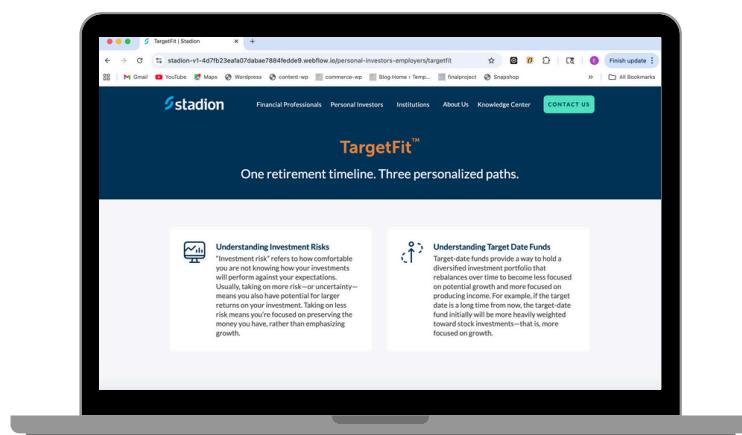
TargetFit

Current



Proposed

- Simplified the dense terminology into clear, everyday language.
- Removed long chains of text to eliminate intimidation for participants and reframe explanations.

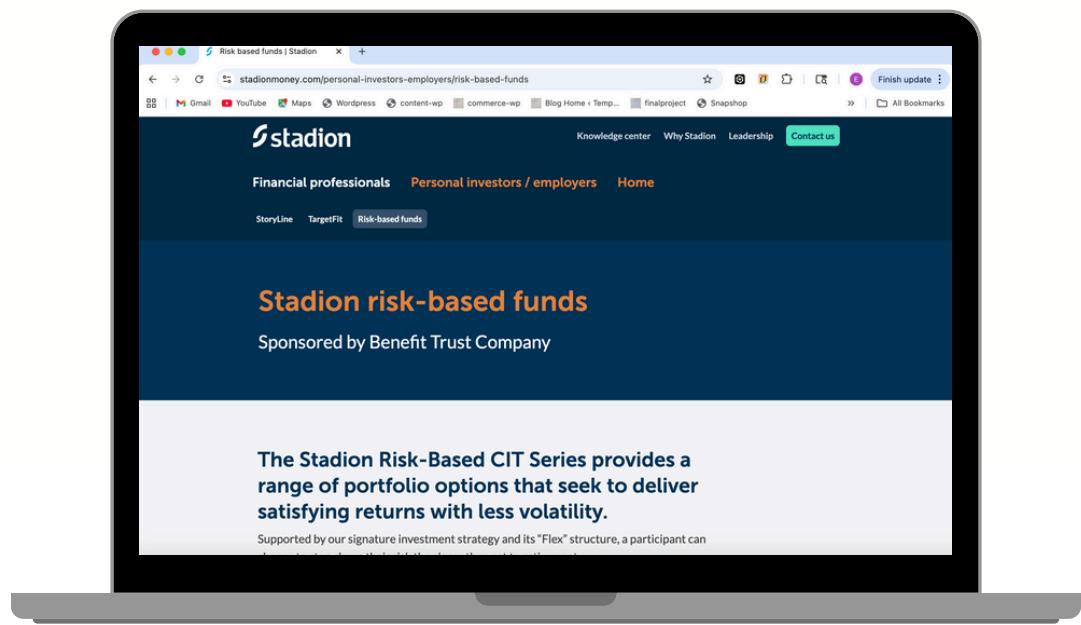


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Website Application

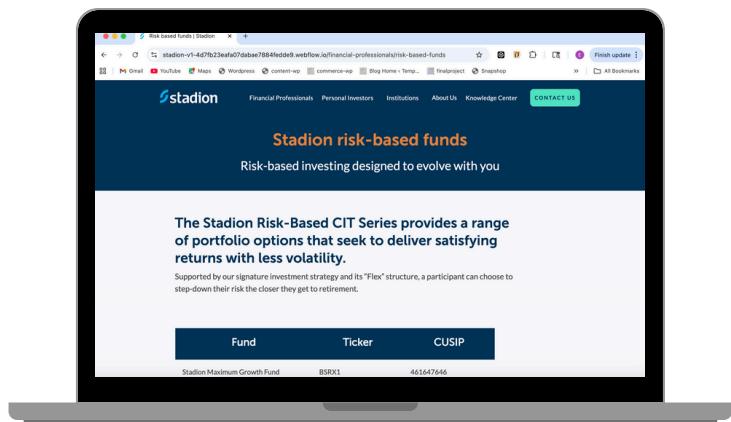
Risk-Based Funds

Current



Proposed

- Updated the messaging to eliminate jargon.
- Made the page's subheading more participant-centric.

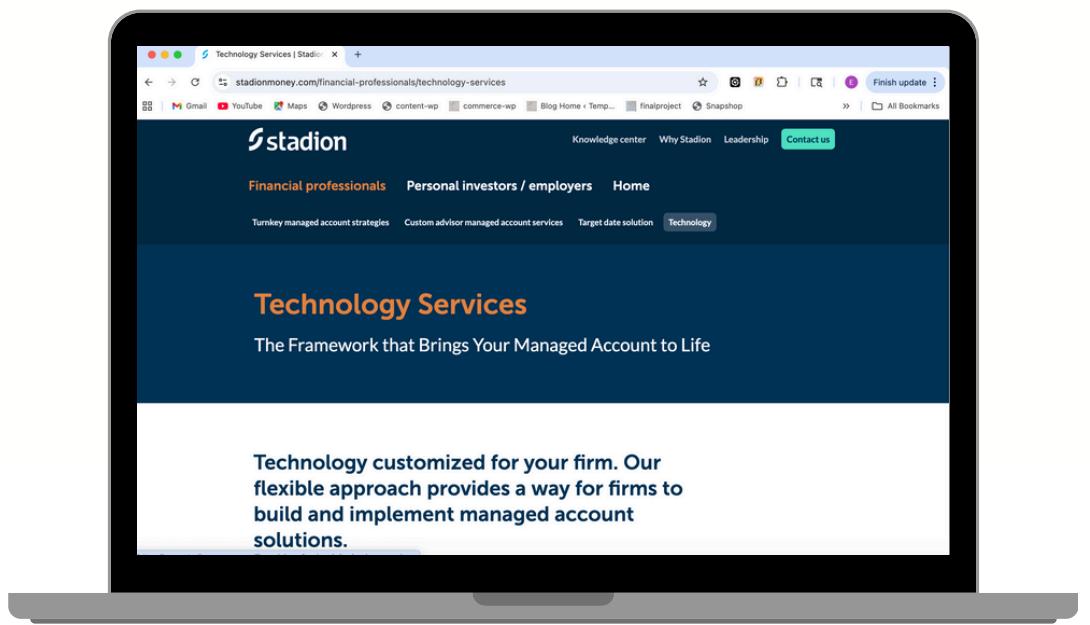


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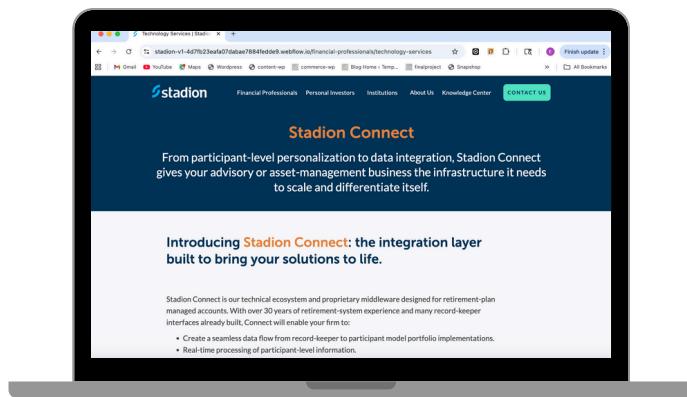
Technology/ Stadion Connect

Current



Proposed

- Updated messaging to reflect Stadion Connect rather than just technology services.
- Highlights proprietary middleware and personalization.
- Gives detailed, yet brief description of Stadion Connect.



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