

# Industry Best Practices Report

## LinkedIn Industry Best Practices Report (Rough Draft)

To help Stadion improve its presence on LinkedIn, we need to find industry best practices to apply specifically to money management firms. The core goal is to rebrand Stadion as a credible and agile technology partner for institutional clients, focusing on increasing traffic to their site and awareness of Stadion Connect, its B2B fintech service.

### Executive Summary

#### Content Formats and Frequency

1. Diverse content formats: Leading financial firms use a mix of content types to engage different audiences. Including but not limited to: leadership articles, data-driven infographics, short videos, and “human interest” stories featuring employees or company culture.
  - a. Carousels lead engagement, video is the next best option; plain text and external links underperform (SocialInsider, 2024)
  - b. Use 1-3 targeted hashtags (SmartAsset, 2023) to spark conversations, which Stadion should focus on rather than engagement via reactions
  - c. Use smart tagging (partners, events, associations) to spark conversations and replies from key audiences
2. Frequency: Posting 3-5 times a week is a widely used benchmark for maintaining a consistent presence without overwhelming followers (Emfluence, 2025). Consistency is more important than volume, and consistency beats bursts.
  - a. Weekday mornings/early afternoons (Tue-Thurs) perform best, validate with Stadion analytics.
3. Video Content: Short-form video (60-90 seconds) is highly effective for explaining complex financial concepts. An animated "explainer" video is a good way to simplify a complex product or service (Levey, 2023).

#### Benchmarks

1. Engagement by impressions have trended upwards from 2024 to 2025 (SocialInsider, 2024). Track engagement rate by impressions (ER/impr) and saves (on each post) for quality (LinkedIn, n.d.).
2. Video watch time tracks engagement/quality of short-form videos
3. Slide completion rate for carousels tracks engagement/quality of carousels

#### Stadion Benchmarks & Engagement Goals

(Need current Stadion analytics)

### **Tone of Voice**

1. Professional, credible, and innovative: Maintain professionalism and authoritative tone in posts, but use minimal financial jargon to appeal to both B2C and B2B customers.
  - a. Stadion should highlight how they differ from “larger, slower, less personal players.”
2. Problem-solution focus: Competitors like Fidelity or Morningstar frame their content around solving common industry problems, such as a lack of personalization in retirement plans or the difficulty of portfolio management (LinkedIn, n.d.)
  - a. Content should be framed around problems Stadion Connect solves for financial institutions and personal investors alike (Sondhelm Partners, 2023), i.e., highlighting how they simplify integrations and enable scale or offer personalized recommendations to individual retirement plans.

### **Competitor Analysis**

This section of this report provides a short analysis on key competitors’ LinkedIn strategies. By examining Morningstar, Empower, Micruity, and iJoin, we identify how these firms have been successfully engaging large institutional audiences and financial advisors on LinkedIn, informing recommendations for Stadion to become a key competitor within this space to sharpen its digital presence and brand differentiation.

Methodology: Platforms analyzed include LinkedIn company pages, executive posts, and content campaigns from 2023 - 2025. Focus areas include post formats (text, video, carousel, external links), frequency and cadence, tone of voice, engagement drivers, and positioning strategy.

1. Morningstar

Content Strategy: Heavy emphasis on thought leadership (market outlooks, research, sustainability reports). Carousels and infographic-style posts allow complex data to be digestible visuals. They also own LinkedIn campaigns, including “Morningstar Outlook,” that creates consistency in posts and anticipation for more information (Galster, 2024).

Strengths: Recognized authority, credibility is reinforced by research. Consistent visual branding in their visual posts. High save rates due to report-style content.

Weaknesses: Dense content is intimidating to less technical/experienced audiences. Limited human storytelling.

## 2. Fidelity

Content Strategy: Data-backed storytelling, including retirement readiness studies (SmartAsset, 2023). Frequent press releases and corporate news with visuals, allowing credibility to shine and positioning themselves as a well-known leader in the industry. Short-form videos include human storytellers simplifying complex ideas, allowing all audiences to follow.

Strengths: Makes large datasets approachable, a mix of company announcements and thought leadership, and leaders in the company are active with content.

Weaknesses: Gives off a more corporate feel (to Stadion's personalized advantage), seeks more engagement (reactions) over conversations, less community feel.

## 3. Empower

Content Strategy: Focused on research reports, converts reports into easily digestible posts, consumer-facing campaigns mixed in with B2B content, creating a personable brand (Levey, 2023).

Strengths: Clear link between insights and what it means for customers. Bright visuals, and strong brand personality (less corporate).

Weaknesses: Inconsistent cadence (some weeks with heavy posts, others none). Relies heavily on paid promotional content.

## 4. Micruity

Content Strategy: Heavy emphasis on partnership storytelling, frequent posts tied to events and conferences, posts highlight industry collaboration rather than product features.

Strengths: Credibility by association (tagging partners and industry leaders), shows momentum with event presence and announcements (Sondhelm Partners, 2023), and quick, timely updates.

Weaknesses: Less emphasis on research or thought leadership, reactive content style.

## 5. iJoin

Content Strategy: Product-focused posts, frequent partner announcements, and simple, clear visuals of product interface. Straightforward posts, product-centric to reinforce niche positioning (Galster, 2024).

Strengths: Clear articulation of their products' value, regular updates to keep followers informed of new updates, and humanizes the product with testimonials and demos.

Weaknesses: Less strategic storytelling, gives off transactional feel. Narrow engagement pool.

## **Strategic Recommendations for Stadion**

1. Engage with the community: Actively participate in conversations by commenting on posts from key partners, competitors, industry leaders, and individual investors.
  - a. A focus on commenting on posts allows Stadion to gain visibility from outside their current network, rather than liking posts (visibility from inside their current network).
2. Leverage employee advocacy: Encourage employees (especially leadership) to share company content with/and their own insights.
  - a. Encourage key personnel to share insights on the fintech space, current industry news, and how Stadion is solving key challenges. This builds credibility and positions the company as a leader.
3. Lean into partnerships
  - a. Feature successful partnerships with financial institutions, tie them to advisor outcomes
  - b. Tag industry leaders and conference events for credibility, relevance, & recognition as an active member of fintech community
4. Elevate thought leadership

- a. Short videos (less jargon, recognizable for everyone) with key Stadion leadership explaining industry trends or discussing current events to spark engagement and conversation

## Sources

1. [https://business.linkedin.com/content/dam/business/marketing-solutions/global/en\\_US/campaigns/pdfs/LNK\\_LMS\\_TacticalGuidetoLinkedIn\\_Rev.pdf](https://business.linkedin.com/content/dam/business/marketing-solutions/global/en_US/campaigns/pdfs/LNK_LMS_TacticalGuidetoLinkedIn_Rev.pdf)
2. <https://smartasset.com/advisor-resources/linkedin-marketing-for-financial-advisors>
3. <https://www.socialinsider.io/blog/linkedin-competitor-analysis/>
4. <https://www.linkedin.com/pulse/content-marketing-financial-advisors-ultimate-guide-louis-levey-oiw6c>
5. <https://www.linkedin.com/pulse/maximizing-your-online-content-guide-financial-services-galster-bxtrc>
6. <https://sondhelmpartners.com/how-financial-firms-can-target-the-clients-they-want-to-attract-on-linkedin/>

# LinkedIn Performance Report

## **Stadion LinkedIn Performance Report**

### **Summary of Current Positioning**

Using data from 91 organic posts on Stadion Money Management's LinkedIn page over the course of a year (Sep 2024 - Sep 2025), we found that Stadion posts ~1.8 times per week, below the 3-5 week benchmark for financial service firms aiming to boost awareness. On average, each post generated 329 impressions, 14 likes, 18 clicks, and an engagement rate of 12.3% (nearly double the industry standard). Thus, although Stadion has a low posting frequency and has areas of improvement for overall reach, engagement is high.

Stadion does well with strong engagement quality: When followers see a post, they interact. Stadion's top-performing posts are human and event-centric, and showcase company culture, partnerships, or company pride. Clicks per post are high relative to impressions, suggesting that the posts made are relevant and engaging to the audience.

However, there is very low overall reach (likely due to limited frequency or no paid amplification). There is also inconsistent cadence, with high-posting periods followed by quiet weeks.

This suggests that Stadion has an active and loyal audience on LinkedIn, but underutilizes LinkedIn's algorithm that rewards frequent posting and high audience engagement.

### **Posting Frequency**

Over 12 months, Stadion averaged around 2 posts/week. Posts center around key moments for the company, like events, webinars, or milestones, and are a more reactive page rather than strategic. Compared with a benchmark of 3-5 posts per month for competing firms, Stadion's current frequency limits its visibility.

### **Impressions & Engagement**

Average impressions per post: 329

Average engagement rate: 12.3%

Average likes per post: 14

Average clicks per post: 18

Current follower count as of 10/13: ~2,000

Though follower count is modest, they are highly engaged with Stadion's LinkedIn content, particularly with posts that include people, culture, or partnership highlights. As the




engagement rate is high, but impressions fluctuate, we know that visibility is most affected by post format and timing rather than follower growth or paid promos.

## Content Analysis

Top performing posts:

**Stadion Money Management** 1,664 followers 5mo · 🌐 + Follow ...

Another great [National Association of Plan Advisors Summit](#) ! It's wonderful to get together with our industry peers and learn from others. Returning home with great enthusiasm for the year ahead!



22 1 repost


Reactions +14

Like Comment Repost Send

Add a comment...

**Stadion Money Management** 1,664 followers 10mo · 🌐 + Follow ...

Our annual Stadion Golf Tournament is a highly anticipated event where we can relax, enjoy each other's company, and catch up with out-of-town colleagues. This friendly competition is always more fun than fierce but that doesn't mean the championship belt isn't highly coveted! Thank you to [Duane Bernt](#) for his coordination of this event every year.



23 1 comment · 3 reposts

Reactions +15

Like Comment Repost Send

Add a comment...

**Most relevant**


[Joel Dean, CFP®](#) · 3rd+ Partner, Senior Investment Advisor, Director of Investment Associate... 10mo ...

Where's the Cheasley Cup??

Like · 1 Reply

**Stadion Money Management** 1,664 followers 2mo · 🌐 + Follow ...

We gathered the team back at Stadion headquarters this week to coordinate strategy, review product offerings and updates, reflect on successes, share stories from the field, and reconnect with each other on a personal level, too. We take our work, which is focused on helping more participants get access to personalized investment help, seriously and always look forward to these meetings.



35 1 comment · 7 reposts

Reactions +27

Like Comment Repost Send

Add a comment...

**Most relevant**

[Joel Dean, CFP®](#) · 3rd+ Partner, Senior Investment Advisor, Director of Investment Associates ... 2mo ...

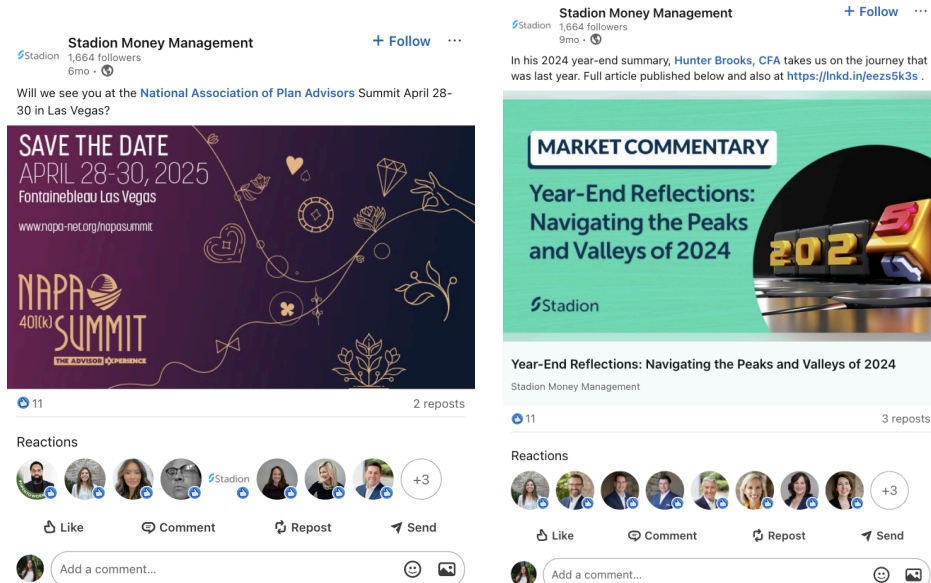
Great company and people!

Like · 1 Reply

1. "Another great National Association of Plan Advisors event"
  - a. Engagement rate: 45.8%
  - b. Potential key drivers: Event-based, team presence, real pictures, tagged event
2. "Our annual Stadion Golf Tournament"
  - a. Engagement rate: 32.1%
  - b. Potential key drivers: Fun, human-centric, social, company pride, real pictures, tagged person
3. Behind-the-Scenes at Stadion
  - a. Engagement rate: 31.7%
  - b. Potential key drivers: Company culture, behind-the-scenes look, real pictures, human-centric
4. "Stadion is proud to have been represented at the 401(k) conference"
  - a. Engagement rate: 29.1%
  - b. Potential key drivers: Credibility with partnerships, tagged partner, event-based

Why they work: These posts include real people and authentic photos, showcase community participation (not just Stadion products), display brand personality, and tied to industry events (giving timeliness and shareability).

Underperforming posts:



1. National Association of Plan Advisors
  - a. Engagement rate: 3.8%
  - b. Potential key drivers: Promotional, little storytelling, busy graphic
2. Hunter Brooks' year-end summary
  - a. Engagement rate: 4.7%
  - b. Potential Key Divers: Technical, low emotional hook

Why they underperform: Overly informational or promotional with low emotional appeal, dense text or minimal imagery/content, and missing a conversational piece or humanizing storytelling.

## Stadion LinkedIn Strengths & Weaknesses

Strengths:

- Engagement rates are almost double industry norms, showing a highly invested audience relative to reach
- Audience interacts with content, especially those that feel authentic and story-driven

- Event, culture, and team content perform best, earning 3-5x higher engagement than product or service updates
- High click-through rates on some posts show followers are motivated to learn more
- Authentic brand representation with posts that feel genuine rather than corporate, building trust with advisors and partners

#### Weaknesses:

- Low posting frequency, limiting reach
- Informational or sales-style posts underperform as it lacks emotional resonance or visual interest
- Weak visuals on majority of posts (few videos/carousels)
- Posts do not intend to spark conversations, engagements are mostly from likes or reposts rather than comments and shares
- Underuse of hashtags and partner tagging, missing opportunities for discovery with LinkedIn's algorithm

#### **Initial Takeaways**

Stadion's current LinkedIn strategy is credible, professional, and has a human brand voice on most posts, however, its page functions more as a validation platform than a growth engine. The data shows that when Stadion does post, engagement is strong: followers care about the brand and interact meaningfully. However, limited posting frequency, lack of content diversity, and more focus on leadership updates limit Stadion's growth with LinkedIn's algorithm.

Impressions and reach are low, despite Stadion resonating deeply (with few people). Increasing frequency and format variety (introducing more carousels, videos, humanized content) can turn it into a broader awareness base.

The top performing posts consistently feature people, culture, and experiences, not as much with products or corporate updates. Posts about the Stadion Golf Tournament and NAPA conference humanize the firm and celebrate Stadion's work. These outperform informational posts (like webinar reminders and invites) by 3-5x engagement, showing that authenticity and storytelling drive conversation most.

Currently, Stadion's LinkedIn page acts as a credibility and retention platform, assuring existing clients and partners that the brand is active. With a more structured strategy,

Stadion's LinkedIn can evolve into a prospecting and brand awareness tool, driving traffic to Stadion Connect and positioning the firm as a thought leader in fintech.

**Next Steps**

To evolve, Stadion's LinkedIn strategy should focus on consistency and format diversification. Here are some recommendations to increase the impact and align with Stadion's goals of increasing awareness for Stadion Connect while maintaining a credible, professional, and trustworthy image:

## Content Plan (next steps)

## Content Plan (next steps)