

# Framework

## Stadion: Strategic Messaging Framework

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# research intent & summary

## Research Intent & Summary

- 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.
  - 1. Identify how Stadion's current messaging performs in communicating brand trust and relevance to its audiences - plan sponsors, advisors, and participants.
  - 2. Analyze competitor strategies to gain insights on clarity, tone, and overall engagement.
  - 3. 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.
- Executive Summary:
  - 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
    - strong value proposition centered on trust and compliance
  - Weaknesses:
    - Overly technical language
    - Weak call to actions
    - Minimal storytelling
  - Opportunities:
    - Simplify complex ideas

- Prioritize human benefits
  - Competitors like Ijoin and micruity communicate with clarity and down-to-earth terms, Stadion can adopt a similar approach without compromising professionalism
- Strategic Implications:
  - Stadion's messaging should balance authority/professionalism & empathy/understanding
  - Simplifying content and highlighting participant outcomes will create a more strategic and persuasive narrative
  - A clear messaging hierarchy will provide consistency and structure across the website and marketing ecosystems
- This overall framework positions Stadion as transparent and dependable, ensuring its online presence reflects its expertise and helping make the transition to introducing Stadion Connect

# Brand Foundation

## Brand Foundation

- Purpose:
  - Stadion's goal is to help retirement plan participants feel secure in their financial future. Stadion provides technology and investment strategies that institutions can use.
    - 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 resource for connection.
- Vision:
  - "Custom solutions for retirement plan advisors, plans, and participants".
  - Stadion is building resources to help everyone get connected and achieve trusted, transparent retirement solutions
- Values:
  - Based on messaging patterns and brand tone, Stadions' values include: trust, compliance, and partnership.
  - Competitive comparison:
    - iJoin emphasizes human understanding and personalization
    - Micruity emphasizes innovation and integration
  - Stadion differentiates itself by leaning into the stability and strong partnerships it has to offer, which are extremely valuable but undercommunicated.
  - Break down each value:
    - Trust: grounded in decades of compliance and expertise
    - Clarity: simplify difficult concepts
    - Support: working with and alongside clients and participants
      - Offering unique and innovative services to help connect
- Brand voice:
  - The overall site presents a formal & corporate tone, which can alienate the everyday participant from understanding.
  - We want to: shift tone to → Knowledgeable but approachable.
    - Avoid jargon
    - Use plain language
    - Keep sentences concise and benefit-oriented
- Differentiation:

- Stadion blends expertise and history with a people-first approach, delivering solutions with clarity and confidence.



# Audience Insights

## Audience Insights

- Primary Personas:
  - Plan sponsors
    - Want confidence that Stadion is a benefit to employees and easy to work with
  - Recordkeeper partners/advisors
    - Value ease of administration, compliance, and trust above all.
    - Want to be able to connect to the right sales person, see credibility signals, and quickly assess Stadion's offerings at a high level.
  - Participants
    - Value clarity & simplicity
    - Want to understand WHO is managing money
    - Visit the site to validate Stadion's legitimacy
- Pain points we've identified
  - Lack of trust in institutions
  - Confusion in financial terminology
  - Overload of overwhelming information
- Overall recommendation: develop messaging that speaks to all groups simultaneously.
- Emotional Drivers:
  - Trust & confidence
  - Emotions drive financial decisions more than logic - particularly relief, trust, and confidence
- Barriers/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.

# Messaging Hierarchy

## Messaging Hierarchy

- The messaging hierarchy is a basis for Stadion's brand communication. It will help us ensure that all content from headlines to CTAs works 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?
- 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.
- Brand story/Master narrative
  - CURRENT master narrative:
    - We're with you for the long run. Founded in 1993, Stadion is an investment management firm that provides custom solutions to retirement plan advisors, plan sponsors, and participants.
  - A strong master narrative should combine credibility and humanity to create a strong foundation. Stadion's should tell a story of making complex systems and plans clear, compliant, and confidence-building.
- Value Proposition
  - tagline / one sentence
  - An example of this:
    - Micruity
    - Ijoin
  - *Recommendation:*
    - Keep Stadion's current value proposition that says "Custom solutions for retirement advisors, plans, and participants."
    - Option to add a short tagline, and then have this value proposition below it.
- Pillars
  - Pillar 1: theme 1 & proof
    - Trust and compliance
      - These are the core differentiators of Stadion. They are proven through longevity and Stadion's regulatory expertise.

- Pillar 2: theme 2 & proof
  - Clarity and simplicity
    - This pillar serves to solve user pain points. Making Stadion professional, yet clear.
- Pillar 3: theme 3 & proof
  - Partnership and support
    - This pillar emotionally connects Stadion to its clients, further differentiating itself from other tech-first competitors.
- Supporting messages
  - Stats
  - Customer testimonials
  - Key differentiators
- Tone guidelines
  - Dos
    - Do speak with the user
    - Use verbs that emphasize support
  - Don'ts
    - Do not speak at the user
    - Use heavy jargon

# Website Application

## Website Application

- Homepage:
  - User attention dissipates after only a few seconds.
  - Recommendation: Addition of a dynamic header that states three of Stadion's key differentiators, followed by their value proposition.
  - Use trust badges and simple visuals
- Overall CTA language:
  - Actionable, engaging, consistent.
  - "Talk to our team"
  - "Explore participant tools"
  - "Learn more through our knowledge center"
  - "Get in touch to learn how we can support your goals"
- Resources/knowledge center:

about page



## About Page

- About Page:
  - Elements: mission, people, and purpose
  - Tell the story of why Stadion exists
  - Include: (in order of top of page to bottom)
    - Small story/ "goal"
    - A small team blurb
    - leadership/role icons with clickable buttons to take you to contact pages for each person on the team
    - trustbages/ partner logos
    - Small contact us form
- Section: Hero/ "Goal"
  - Heading:
    - "Helping you build confident retirement futures."
  - Subheading/lead paragraph:
    - "Since 1993, Stadion has partnered with plan advisors, sponsors, and participants to deliver custom investment strategies grounded in experience and driven by clarity."
- Section: "Team blurb"
  - Heading:
    - "Our team, your partners."
  - Subheading/ paragraph:
    - "We're a group of investment professionals, technologists, and service specialists who believe that the best outcomes are produced when people and processes work together. Our purpose is to support your business, your team, and your participants along the way."
- Section: Leadership and contact buttons
  - Display a grid of leadership cards (name, role, short tagline) with an icon/button such as "contact [name]"
- Section: Partner logos & trust badges
  - Heading:
    - "Trusted by the industry"
  - Subheading:
    - With over 30 years of experience and partnerships across the retirement industry, Stadion delivers trustworthy results you can rely on."
  - Provides industry proof and enforces credibility

- Section: Contact form
  - Heading:
    - "Let's talk about how Stadion can support your retirement strategy."
  - Form fields:
    - Name, role (advisor/sponsor/participant), company, email, message sections
  - CTA: "Contact our team"
  - Add secondary contact information
    - Phone number and location (Athens)

Page: Financial Professionals

## Financial Professionals

- Heading: Keep "Financial Professionals"
  - Center text
- Hero section:
  - Heading:
    - "Custom solutions built for your advisory practice."
  - Subtext:
    - "Stadion partners with retirement-plan advisors, sponsors, and participants to deliver differentiated solutions tailored to the needs of your business and outcomes."
  - CTA: "Get in touch with our advisor team."
- Section: Intro paragraph
  - "You don't have to accept the one-size-fits-all retirement solutions. Here at Stadion, we believe your clients and participants are unique - and your approach should be too. Whether you're building managed accounts, integrating technology, or differentiating target-date funds, we'll give you the flexibility and support to make it happen."
- Section: Services
  - Revised benefit headings
  - We need to change the block photos
    - Heading 1:
      - Stays the same "Turnkey Managed Account Strategies"
    - Subhead 1:
      - Storyline
    - Subtext 1:
      - "Launch a ready-built, participant-level solution to accelerate growth and create overall value for your clients."
    - Heading 2:
      - "Custom advisor managed account services"
    - Subtext 2:
      - "Design and implement portfolios that reflect your advisory philosophy - with Stadion's existing infrastructure supporting every step along the way."
    - Heading 3:
      - "Target Date Solution"
    - Subheading 3:
      - "TargetFit"

- Subtext 3:
  - "Offers participants multiple glidepaths - so you can better serve the diverse needs of your clients."
- Heading 4:
  - "Technology Services"
- Subheading 4:
  - "Stadion Connect"
- Subtext:
  - "Leverage our integration layer, data-flow architecture, and technology framework to scale your offerings with ease."
- Note: remove the block that says "find your Stadion consultant" - the button doesn't work, and no options appear when searching.
- Replace with:
- Section: CTA
  - Heading:
    - "Elevate your advisory offerings"
  - Button options:
    - "Schedule a consultation"
    - "Get in touch with our team."
    - "Let's work together."

Page: Turnkey managed account  
systems

## Turnkey Managed Account Strategies

- Make heading "Turnkey Managed Account Strategies"
  - Remove storyline from heading
  - Center text
- Subheading
  - Center under heading in smaller text
  - "StoryLine: Personalized investment solutions designed to help improve retirement outcomes."
- Hero section/ first:
  - Heading
    - "Managed accounts designed for real-world outcomes"
  - Subheading /paragraph:
    - "With Stadion's StoryLine, you gain a turnkey platform that helps your participants feel confident and your advisory business scale. Today's retirement plan participants face complex choices and diverse goals. As an advisor, you need a solution that goes beyond just fund selection - one that offers personalized support and scales for both you and your participants. That's where Stadion's StoryLine comes in."
- Section: the current graphic
  - Options:
    - Remove graphic completely
    - Update graphic so that the different elements glide onto the page seamlessly
- Section: Benefits
  - Heading: "Why advisors choose Stadion"
  - Sub-text:
    - Simplified oversight - we'll handle the selection of funds.
    - Tailored participant experiences - personalized portfolios based on your participants' needs.
    - Fee-Friendly structure.
    - Independent and flexible.
    - Differentiated support.
- Section: Storyline options
  - Heading:
    - Change heading from "Storyline Options" to "Flexible by design"
  - Sub-text:

- "Storyline can be structured using Collective Investment Trusts or a plan's existing fund lineup - giving your business control as well as scalability."
- Section: Call to action
  - Heading:
    - "Are you ready to explore the differences StoryLine can make?"
  - Subtext:
    - "Let's talk about how your business can leverage turkey-managed account services to enhance participant outcomes and support your growth."
  - Button text options:
    - "Get it touch"
    - "Contact a Stadion Professional"
    - "Schedule a consultation"



Page: Custom advisor managed  
account services

## Page: Custom advisor managed account services

- Revised Dropdown Heading:
  - Advisor managed account services
- Hero section:
  - Headline options:
    - "Your model. Your clients. Custom managed accounts that fit both."
    - "Custom managed accounts - built for the way you manage."
    - "Custom managed account solutions built around your business model."
    - Text: centered on page
  - Subhead:
    - "Deliver tailored retirement solutions that reflect your strategy, support your fiduciary role, and create value for advisors, plan sponsors, and participants."
  - Visual options:
    - Photo of a professional advisor engaged with clients
    - Simplified graphic that shows relationships/partnerships between: Advisors → Stadion's platforms → participants
- Section: Why it matters & what you gain section
  - Heading
    - "Putting your advisory business first"
  - Paragraph:
    - "Our Custom Advisor Managed Account services give you the flexibility to build a managed account solution aligned with your model - so you can deliver outcomes that matter."
      - Four ways you'll benefit
        - Have these come into the page in a dynamic list way?
        - Strategic control
        - Fiduciary confidence
        - Operational efficiency
        - Participant impact
- Section: Features
  - Heading:
    - "Built for flexibility and scalable growth"
  - Dynamic list that appears on the page as you scroll? Or blocks?
    - Multiple underlying investment options
    - Build custom glide paths

- Select custom & default additional glide paths
  - Consultative process with Stadion's investment team
- Section: CTA section
  - Heading:
    - "Are you ready to explore how our custom managed accounts can fit your advisory business?"
  - Subheading:
    - "Let's talk about how Stadion's platform can support your strategy. "
  - Button
    - "Get in touch"
- Footer: keep as it is with regulatory/ legal text.
- Reasoning:
  - The hero section introduces the service and leads with the advisor's need.
  - The what you gain section buts benefits first.
  - The features section keeps Stadion's key list but reframes them as benefit-led.
  - CTA's are clear and action-oriented.
  - Tone remains clear and competent.

Page: target date solutions

## Target Date Solutions

- Regulatory agreement stays in place
- Page Heading: "TargetFit"
  - Center on page
- Subheading: "A target date solution that's more than a number"
  - Center on page
- Hero Section:
  - Heading:
    - "Target-date investing that fits each participant."
  - Subheading:
    - "With TargetFit, you get **multiple glide paths**, **flexible implementation**, and a **solution built for your plan**, your advisors, and your participants."
  - Move up the "you're more than a number" section - and change to a CTA
    - "See how it works" - this will then take you to the PDF fact sheet
- Section: challenges in target date investing
  - Heading:
    - "Why the one-size-fits-all model isn't working anymore"
  - Subtext:
    - "Traditional target date funds group participants by age and assign a singular glide path to everyone - the truth is plain and simple - not all participants are the same. They differ in terms of risk tolerance, savings level, comfort with fluctuations, and years to retirement. For retirement plans that want better outcomes, a more specific approach is necessary."
- Section: "Our solution"
  - Text:
    - "Stadion's TargetFit offers three distinct glide paths - conservative, moderate, and growth - so participants can choose what fits each of them the best. Implementation is simple through most record-keeper platforms, allowing you to deliver a streamlined experience and provide your advisors and participants with choice - without complexity."
- Section: Glide paths
  - Heading
    - "Which path fits your participants?"
  - Subheading:

- TargetFit allows participants to select a glide path that accurately reflects their retirement timing and risk profile. Choose from:
- Subtext:
  - Conservative - for participants who prioritize the protection of their savings and are looking for a smoother ride rather than maximum growth.
  - Moderate - for those seeking balance between growth and stability.
  - Growth - for participants who are comfortable in taking a higher risk today for higher long-term potential.
- Section: CTA
  - Heading options:
    - "Connect with our team."
    - "Learn more about TargetFit."
    - "Get in touch with us."
    - "Partner with Stadion."
  - Subheading options:
    - "Find out how TargetFit can support your plans' needs."
    - "Our team can help you find the right solution."
    - "Explore how our glide path approach can enhance your outcomes."
  - Alternate link:
    - "Download our TargetFit fact sheet."
  - Note: Is there a way to put all 4 fact sheets into one link and delete this subsection to just have it as a small link in the CTA section?

Page: Technology/ Stadion connect

## Technology: UPDATE to Stadion Connect

- If possible, move this out of the financial professionals dropdown and into its own/ institutions? Up to the discretion of web developers (Suba).
- Updated heading:
  - "Stadion Connect - technology built to help power your retirement platform."
- Sub-heading
  - "From participant-level personalization to data integration, Stadion Connect gives your advisory or asset-management business the infrastructure it needs to scale and differentiate itself."
- CTA:
  - "Request a demo and get in touch."
  - Secondary CTA:
    - "Download the connect overview"
      - Attach the press release
      - At a later date, recommend that Stadion create a slide deck/PDF overview to link to
- Section: Our solution - Stadion Connect
  - Heading
    - "Introducing Stadion Connect - the integration layer built to bring your solutions to life."
  - Subtext:
    - Stadion Connect is our technical ecosystem and proprietary middleware designed for retirement-plan managed accounts. With over 30 years of retirement-system experience and many record-keeper interfaces already built, Connect will enable your firm to:
      - Create a seamless data flow from record-keeper to participant model portfolio implementations.
      - Real-time processing of participant-level information.
      - Scalable infrastructure that processes data elements daily and supports participant personalization.
      - Flexible implementation: you can use Stadion's full solution, or integrate it into your existing advisory platform.
- Section:
  - Heading
    - "What this means for you"
      - Participant-centric experience



- Faster time to market
  - Lower operational burden
  - Future-ready flexibility
- Section: CTA/Footer:
  - Heading options :
    - "Ready to power your retirement offering with Stadion Connect?"
    - "Power your platform with proven, trusted technology."
  - Subtext options:
    - "Built for firms that require scalability, flexibility, and a trusted partner."
    - "Streamline integration, scale faster, and deliver a tailored participant experience with Stadion Connect".
    - "Stadion Connect handles the back end so you can focus on your clients."
  - CTA options:
    - "Learn how we can support you"
    - "Get a connect overview"
    - "Start your integration."
    - "Talk with our team on how to get started."

Page: Personal Investors / Employers

- Revised dropdown subheading
  - Current: random fact about Stadion (“For more than 25 years, Stadion has had the same goal: help individuals invest with confidence and ease”)
  - Option: “Empowering you to invest with confidence – without the confusion”
  - Option: “Simplifying investing so you can focus on what matters most.”
  - Center text on page
- Section: Our Mission
  - cut the parentheses “(Because you’re hiring us to be the financial experts, so you don’t have to be.)”
  - cut “...how you feel about risk” → feels unprofessional & unnecessary
  - Three pillars (visual icons or cards):
    - Add subheadings:
    - 1. Clarity you can trust
      - Plain-English explanations – no jargon, no confusion
    - 2. Personalized tools
      - Technology that reflects your goals and comfort with risk
    - 3. Real people, real support
      - A U.S. – based service team prepared to help by phone or email whenever you need it
- Section: Who We Are
  - Heading Option: “Rooted in Georgia. Built for you.”
  - Paragraph Option: “Privately owned and based near Athens, Georgia, Stadion combines small-town values with nationwide investment expertise. Our team is dedicated to doing right by every client—offering personal service, innovative technology, and decades of asset management experience.”
- Section: Stadion’s retirement offerings
  - Rephrase section title:
    - Option: Explore Our Retirement Solution
  - Heading Option: “Find the right fit for your retirement goals.”
  - Outdated, seemingly random images for each offering
  - Visual options:
    - Photo of real people (not stock photos) reviewing their retirement plan together
    - Graphic displaying connection between: *Investor* → *Stadion’s platform* → *Confident retirement outcomes*

- In need of a better CTA button:
  - Option: Explore your retirement options
  - Options:

Page: TargetFit

- Pop-Up improvement:
  - Current: very jargon-heavy and lengthy
  - Suggestion: Keep a simple checkbox or one-line certification at the start
    - e.g., "By continuation, you confirm that you are a qualified retirement plan or advisor." [Agree]
- Hero Section:
  - Center headline
  - Revise subheading:
    - Option: "TargetFit: Personalized target date investing for every kind of saver."
    - Option: "One retirement timeline. Three personalized paths."
    - Option: "Because your retirement goals deserve more than one-size-fits-all."
- Section: Understanding Target Date Funds
  - Heading Option: "How target date funds work."
  - Shorten paragraphs
    - Currently, the imbalance between the amount of text on each box creates a lot of extra space that could definitely be shortened.
  - Visual suggestion: simple animation or graphic showing a slide path shifting from high growth → balanced → conservative over time
  - Remove jargon under TargetFit Glide Path graph
    - Feels unnecessary as some of it is just finance term definitions
- Section: Choose Your Glide Path
  - Heading Option: "Three paths. One destination: your retirement."
  - Subheading option: Select the TargetFit glide path that best matches your your goals and comfort with risk
  - Visual idea: Three side-by-side cards (with mini line graphs showing different glide path slopes)
    - Replace abundance of bullet points under each path option with a short blurb about the option, and add in a CTA button (e.g. "Explore Conservative," "Explore Moderate," "Explore Growth")
- Section: Compliance and Disclaimers (collapsed by default)
  - Heading: "Important Information" (accordion dropdown)
    - Include all the legal text, disclosures, and references here

Page: Risk Based Funds

## Risk-Based Funds

### Overall notes:

- Change Management team/ Clay's block to a contact CTA
- Unless required - delete all jargon listed at the bottom of the page - this page is for participants, this info will overwhelm them
- Change the literature and forms at the bottom to just "helpful resources"
- Popup Recommendation
  - Current issue: Popup repeats the same qualified-investor notice users already see on other Stadion pages
    - Creates friction and confuses visitors who have already confirmed their eligibility from another page
  - Option: Move Popup to homepage so they are already verified
- Hero Section
  - Suggestion: Center headline and subtext
  - Subheading
    - Current: "Sponsored by Benefit Trust Company)
      - Suggestion: Replace subheading with "Risk-based investing designed to evolve with you."
        - Also move sponsorship to the bottom of the page, it should not be the subheading.
- Section: Our Fund Lineup
  - Heading: "Choose Your Comfort Zone."
  - Suggestion: Remove Ticker and CUSIP values, and instead create a description for each type of fund
    - If Ticker value and CUSIP value are needed, create a button for each row in the chart that has a "See More" CTA
- Section: Our Approach
  - Subheading: "Build to flex with the market."
  - Suggestion: Change list the cards or icons with blurbs
    - 1. Equity
    - 2. Flex
    - 3. Fixed Income
- Section: How it Works
  - Subheading: Dynamic strategy. Smarter balance."
  - Visual Suggestion: Two simple side-by-side graphics
    - Traditional Balanced Fund
    - Stadion Balanced Fund



- Section: Meet the Manager
  - Current: Section is titled "Meet the Team," however there is just one individual on the page
  - Suggestion: Create a card and shorten his description, add a "Read full bio" modal or separate page
- Section: Resources
  - Keep links if they are necessary
- Suggestion: Cut the jargon at the bottom of the page
  - If needed, make this a dropdown section that is collapsed by default

Eby's random notes

- Recommendations and findings
  - Contact page
  - Segmenting employees
  - Dividing the knowledge center into sections based on the audience
  - Emphasis on professional, clean design and simple content
  - Use the site as a credibility handoff and reference point
  - Two fast lanes
    - Financial professionals and personal investors