

 **Stadion**

User Research

October 2025



Executive Summary

Research Intent

- Understand how sales and clients use and experience the current Stadion website.
- Identify opportunities to improve structure, functionality, and messaging (without changing branding, look and feel).
- Benchmark against competitor sites to surface best practices.

Key Findings



Website
rarely used



Keep it simple &
easy-to-navigate



Route visitors to
sales reps



Differentiate from
recordkeepers



Cater to different
audiences



Emphasize trust
& reliability

Research Intent

Purpose of Interview

The purpose of this research is to gather firsthand insights from Stadion's sales team on how they and their clients experience the current Stadion website. While branding, look, and feel must remain unchanged, the goal is to identify opportunities to improve structure, functionality, efficiency, and messaging clarity.

Specifically, we aim to:

- Understand how and why the sales team and clients currently use (or don't use) the website.
- Identify barriers to usability and opportunities for simplification.
- Explore which resources, tools, and messaging would better support advisors, recordkeepers, and plan participants.
- Benchmark against competitor sites to surface best practices.

Target Audience

The audience we intended to hear from were Stadion's clients, both from the money management and financial technology sides. Because we are unable to contact clients directly, the next point of contact for this perspective was Stadion's sales team, who have strong relationships with the target audience and work to solve customer pain points on a daily basis.

Methodology

We conducted semi-structured, qualitative, remote interviews with members of Stadion's sales team. Questions focused on perceptions of Stadion's current website, usage patterns, competitor comparisons, and ideas for improvements.

Participants: 4 sales team members with deep client-facing experience on the asset management side.

Format: 30-minute conversational interviews guided by a set of questions.

Focus Areas:

- Website usage and importance in sales/client conversations
- Messaging clarity and jargon
- Features/resources sales would like to see
- Client FAQs and common pain points

Questions:

- How would you describe the current messaging/wording on Stadion's site?
- What feedback do you have on the current site? From personal use or from clients?
- Are there any common concepts that prospective clients frequently ask questions about? How could we help to simplify these?
- Are there any other sites with similar services you've seen? How would you compare their site to Stadion's?
- What sells — reputation, trust, the product, or one particular aspect of the product?

Interviewees

Stadion Sales Team



Steve Mason

Vice President, Retirement Consultant

"[What sells] for Stadion is trust. You build trust with the people you work with, and if anything goes sideways, they know it's gonna be taken care of."



Tyler Brewton

Vice President, Wealth and Retirement Consultant

"It's hard because who we're talking to changes drastically day to day. There's such a large spectrum, from blue-collar workers to nuanced, tech-savvy people."



Ashley Reinhardt

Senior Regional Sales Consultant

"The homepage message doesn't match our branding. It needs to be updated and cleaned up to look sharper."



Katie Kilch

Senior Regional Sales Consultant

"There's an element of distrust in the financial industry: people want to know, who is this company, and why do they have my money?"

High-Level Findings

What is each demographic looking for?

Participants: Validate legitimacy, understand who's managing their retirement, and how this helps them. They're not shopping for features.

Advisors/recordkeeper partners: Quickly assess the offering at a high level, see credibility signals, and connect to the right sales person. It could be helpful to have a demo glimpse (participant experience + advisor portal/data story).

Plan sponsors: Want confidence that Stadion is a benefit to employees and easy to work with.

How in-depth should content be?

Too much detail creates confusion and drag. The site should stay high-level, centralize/summarize proof from the Knowledge Center, and direct visitors to live sales representatives for specifics.

Any information architecture confusion?

Login portals are expected by participants, when they should really be going to their recordkeeper's site.

Representative finder is present but not as obvious as it should be.

Knowledge Center is useful but not audience-segmented. It is more useful for those already familiar with the industry.

What do we need for conversion?

Stronger call-to-actions (CTAs) needed for Contact Sales (geo-routed) and Request a Demo (two versions: participant preview and advisor data/"what you get" portal).

Insights

1. Visitors arrive with two very different intents

Participants: “Who is this company, and can I trust them?”

Advisors/recordkeeper partners: “What exactly do you offer and who do I call?”

Many visit mistakenly and expect to log into a portal when they actually need their recordkeeper.

2. Trust > technical detail

Trust, reputation, and reliability is what sells. The home page must look “legit,” professional, and credible.

As the website is rarely used by customers or Stadion, the site should serve as a touchpoint to verify Stadion’s positioning in the industry.

3. Site is not the primary sales tool today

Sales at Stadion rely on relationships, phone calls for further information and help, and tailored materials.

Site should assist conversion (credibility, clarity, contact) rather than an in-depth specification on the company.

Insights

4. Knowledge Center is valuable but needs a cleaner structure & clearer audiences

It is currently unclear who the Knowledge Center is for, given the variety of Stadion site visitors and its prominence on the front page.

Large spaces of financial jargon are present on the site's landing, which can overwhelm participants.

5. More focus on routing to the right rep

Routing to the right representative (by state/role) should be more prominent than it is now — "I live in Texas, who should I contact?"

The current contact flow is easy to overlook for some. Further clarity on these steps is a path toward new B2B prospects.

6. Frame positioning vs. Target Date Funds

Target Date Funds (TDFs) are an everyday comparison, and having simple proof points or a framework to illustrate Stadion's value vs. a traditional TDF can be a useful tool for visitors.

Due to compliance, this should be executed indirectly (a brief overview on differentiators).

Implementation

1. Create a clear overview of the firm

Stadion customers are unable to differentiate between the role of Stadion's site and their recordkeeper. As there is an element of distrust in the industry, Stadion should develop an updated front page overview that highlights Stadion's history, leadership, and recordkeeper partnerships in a straightforward, visual way. This should help visitors quickly understand what Stadion does, who's behind it, and why it's trusted.

2. Further brand cohesion

Align website's visual style with Stadion's updated marketing materials, cleaning up its design to make the site feel sharper and more tech-forward.

3. Simplify solutions

Focus on explaining what Stadion offers and why it matters, rather than listing every variation or technical detail. Keep language high-level, visual, and benefit-driven, with clear calls to action directing visitors to contact the team for more details.

4. Lead with trust; use site as a "credibility and handoff" engine

To communicate legitimacy in the industry, Stadion should use simple proof points: years in business, security standards, and a carousel or animated scrolls of partner logos on their home page to lead with trust. The site should prompt visitors to "Find Your Rep" or "Request a Demo" for sales execution.

Implementation

5. Redesign fast lanes

Streamline the homepage experience for Stadion's main audiences: participants and advisors/plan sponsors. While Stadion utilizes this, there is clutter surrounding these buttons (Knowledge Center, weak CTAs). Making this the first and only visible task on the homepage might help with overwhelming participants who are unfamiliar with the industry.

6. Condense, organize, and label Knowledge Center

Reorganizing the Knowledge Center could lessen financial jargon seen on Stadion's homepage. Adding clear categories by audience, collections, and simplifying asset cards will allow visitors to quickly find what's relevant to them. Condensing each article to a title, one-line summaries, and categorized by intended audience could provide for better use while still maintaining credibility, relevance, and utility of Stadion's insights.

7. Create a nuanced TDF vs. Stadion framework

Develop a light, compliant explanation that positions Stadion's managed accounts as a personalized complement to traditional Target Date Funds. Focus on personalization, adaptability, and long-term value, without implying competition or performance differences. This helps advisors and sponsors understand Stadion's differentiator in personalizing financial solutions.