



## The Todd Organization

# REBRANDING + RELAUNCHING AN INDUSTRY PIONEER

**SINCE 1957**, when Company founders created the first-ever deferred compensation plan, The Todd Organization has earned its reputation as the innovator in designing and managing executive benefit programs and funding solutions for America's best mid to large-sized companies.

A respected industry thought leader, The Todd Organization understands the value of a strong brand identity to help attract and retain top talent and maintain customer relationships. When they saw their brand lacking a clear value proposition and messaging that failed to align with the evolving benefits marketplace, they turned to Shamrock for help.

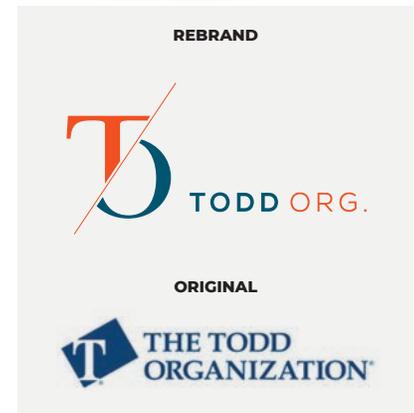
Shamrock led The Todd Organization executives through a brand discovery process to glean details needed for essential messaging and brand direction. From there, Shamrock went to work, creating an integrated rebrand that included new brand positioning and logo, redesigned collateral with an online ordering portal, a new website and a sophisticated custom gift package to introduce the brand to the Company's producers.

### THE SOLUTION

Shamrock led with a new brand tagline that set the tone for all other elements to follow: *"Creating financial security for talented people and the companies they build."*

We developed a new logo and brand standards package. Shamrock then implemented these items, designing and producing a rebranding launch kit that was distributed to The Todd Organization producers across the country to create a buzz about the new brand. The kit included a branded thumb drive pre-loaded with new collateral that included a branded PPT template, email signature and approved versions of the new logos to protect brand integrity. The kit was handsomely packaged in a branded gift box to appeal to both younger talent and longtime partners. In addition to the collateral items, the kits also contained a curated selection of high-end branded apparel and premium items, including a Peter Millar polo shirt and ¼ zip pullover, a stainless-steel tumbler, pens and more.

Guided by the new brand standards and messaging, Shamrock designed and developed an engaging new website for The Todd Organization that makes a more



powerful, contemporary brand statement. As part of our comprehensive website services, we provide ongoing site maintenance and manage content updates.

Shamrock also recreated The Todd Organization's marketing collateral suite, including brochures, plan-specific feature sheets and other business stationery. To provide seamless management of those materials, Shamrock set up The Todd Organization on our technology platform, creating a marketing asset management portal that houses all collateral, apparel and premium/promotional items. Producers can use the online portal to order collateral with print-on-demand efficiency while Shamrock manages warehousing and fulfillment for end-to-end marketing program management, giving The Todd Organization a turnkey solution for efficient program oversight.

**WHY IT WORKS**

Companies today seek partners who are experts in their respective fields, but they also want to work with partners who share similar values and vision. That alignment is essential to solving problems together, collaborating and creating great results. Shamrock helped The Todd Organization define and articulate their value and vision through a complete rebranding experience. Integrating that messaging across new marketing assets, we helped the organization convey their brand promise in a way that resonates with their producers and customers alike and is modern and fresh to attract new talent to their team.

