

Fidelity Investments Retail Distribution Plan & Merchandising Strategy

Challenge:

Develop a national retail distribution and marketing strategy that will support the roll-out of Fidelity branches and institutional partnerships, and simplify the consumer's research and purchase of mutual fund products and services.

Approach:

- Conduct field research, including customer intercepts, consumer focus groups, key institutional partner interviews, and mutual fund sales associate interviews to determine SWOT's and market gaps
- Analyze the investment and mutual fund market to understand market conditions, regional variations, consumer trends and preferences
- Complete a national real estate analysis of competitors, identify real estate market conditions favorable for potential retail presence
- Assess all processes associated with mutual fund research, selection, purchase, management and maintenance

Recommendations:

- Develop a tiered distribution strategy that can be implemented in major/mid markets, urban/suburban locations and key institutional financial institution branches
- Update the Fidelity Investments brand to translate effectively within retail environments
- Develop a standardized branch, merchandising and communications program
- Prototype branch development in 6 markets within urban, suburban and institutional locations

