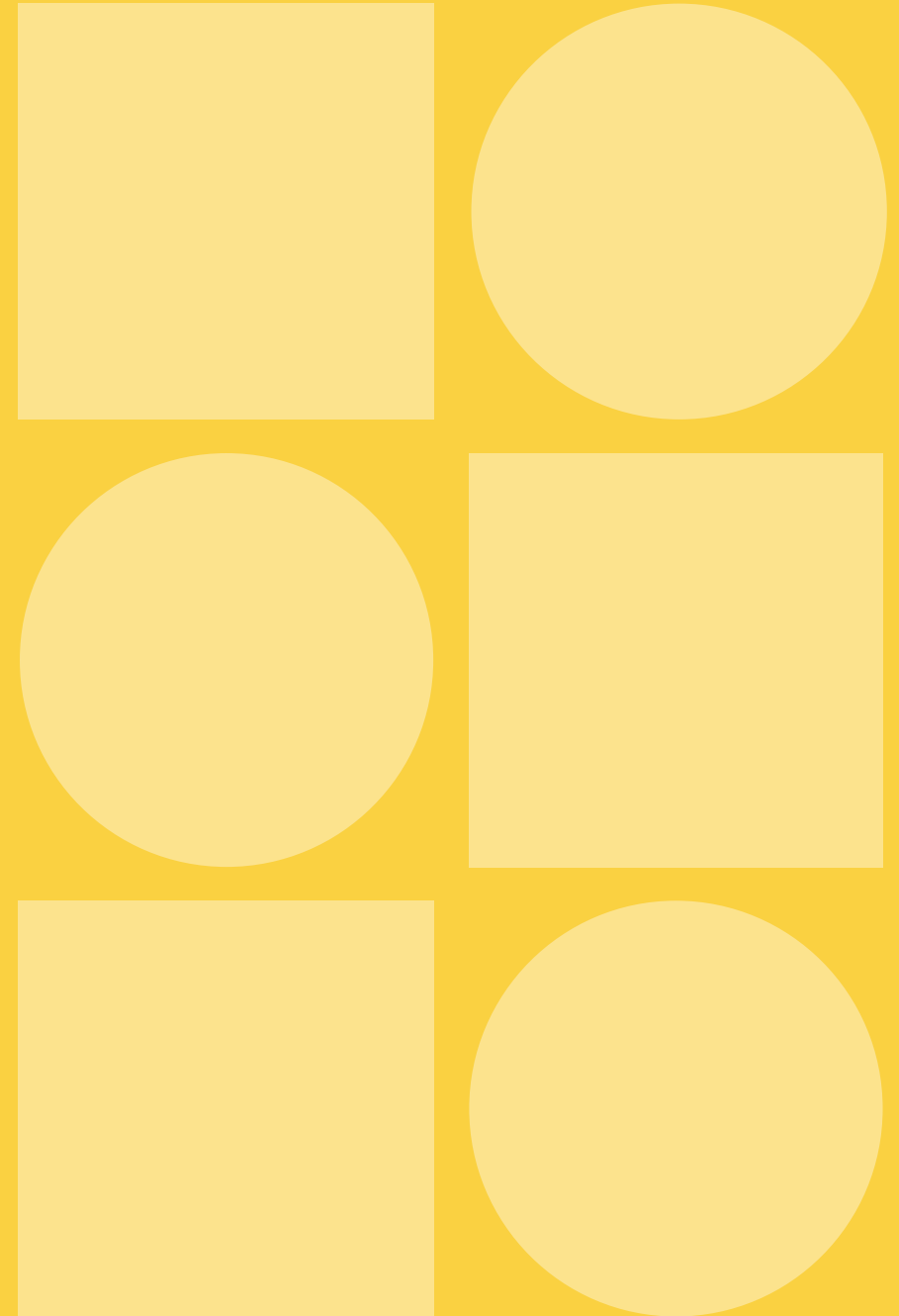
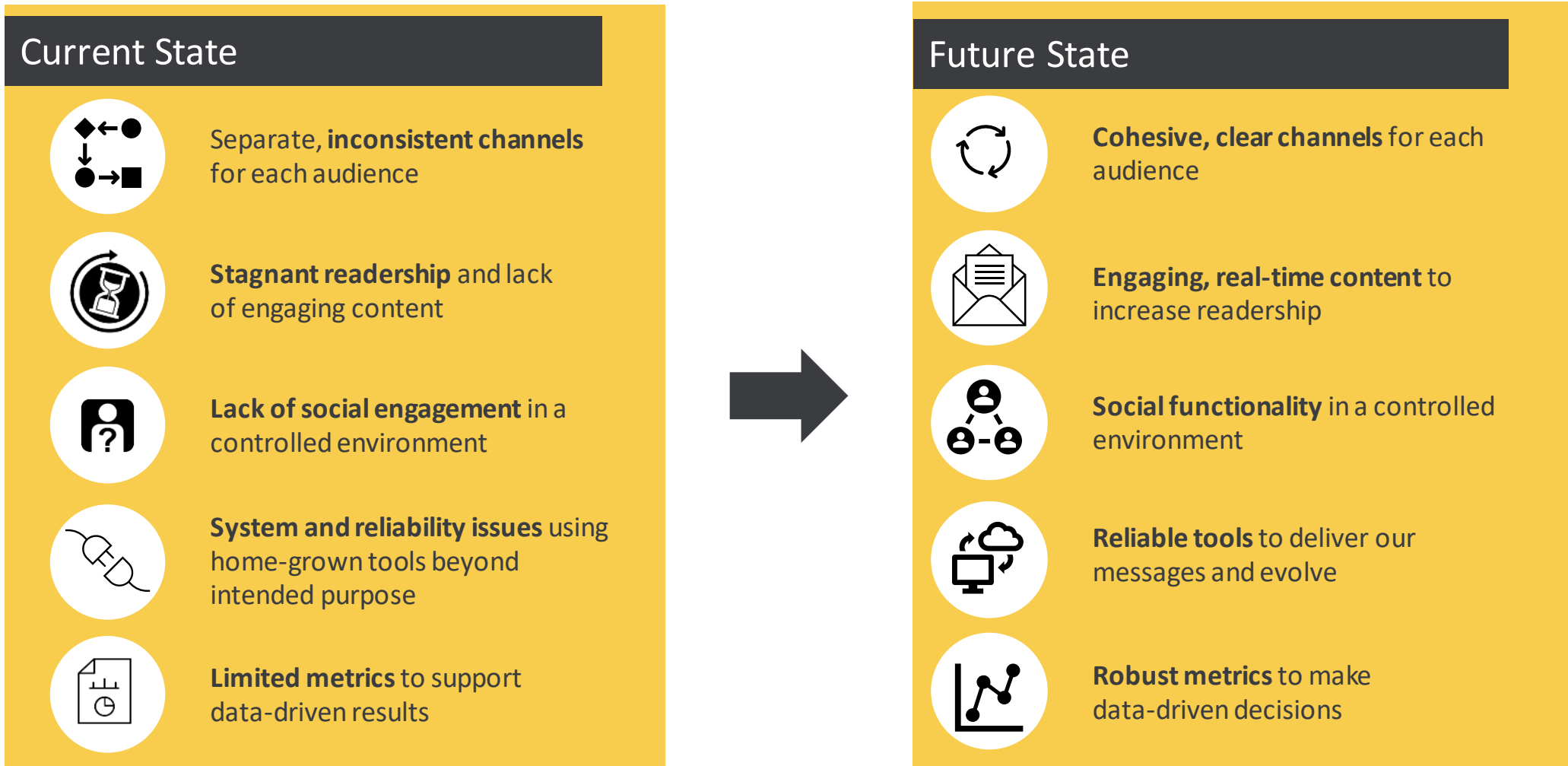


Change, an Axiom to Grind

Attune Conference 2022

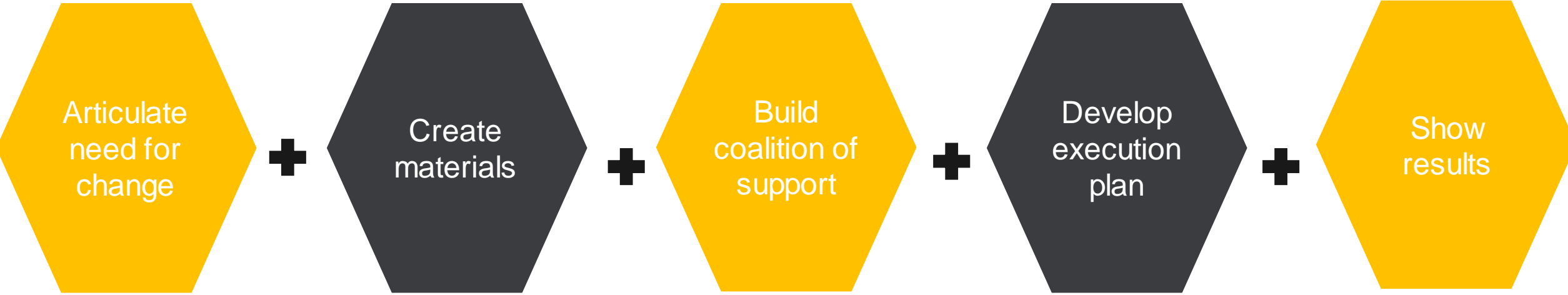


IDENTIFYING NEED FOR CHANGE



BUILDING A BUSINESS CASE

In five simple steps:



ARTICULATE **NEED FOR CHANGE**

To build our business case, we needed to articulate the need to our firm leaders and firm planning group to get approval and funding.

WHO will be impacted?

- Branch associates
- Home-office associates
- Communications team

WHAT problem are we solving?

- Help associates understand (what, why) and embrace (how) the new internal communication platform will support their personal success and the firm's transformation

WHERE are we finding support?

- Firm leaders
- Firm advocacy groups
- Feedback from associates

HOW will we do this and demonstrate results?

- Enhanced metrics that show increased engagement
- Feedback from associates

CREATE MATERIALS

- Tailor to your audience for maximum impact
- Consider what your audience needs to know, feel and do
- Highlight executive support to reinforce importance
- Catch attention with visuals
- Be succinct and direct

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Communication Channel Evolution

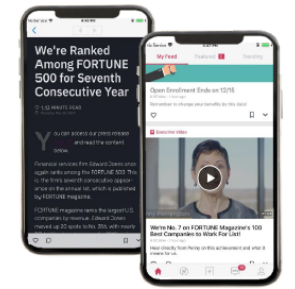
Channel Vision

We aim to deliver dynamic, client-centric communications through leading-edge technology that informs, engages and empowers associates.

Our main objectives are to:

- Identify and adopt an innovative channel platform to enhance content delivery and streamline internal communications.
- Enable Home Office, Branch Teams and Field Leadership to better communicate and collaborate directly with associates using innovative tools that enable two-way communication.
- Improve and personalize user experience for all associates and branch teams.
- Improve efficiency, effectiveness and measurement of our communications and manage/leverage content appropriately.

Why Now?



...ek to become an industry leader using
...ecute core and strategic work.

"Both the high-touch and high-tech modes of service are critical to delivering value and the unique Edward Jones Client Experience."

- Penny Pennington

Edward Jones[®]

Internal Communication Platform Implementation

Channel Vision

We aim to deliver dynamic, client-centric communications through leading-edge technology that informs, engages and empowers associates. Our main objectives are to:

- Identify and adopt an innovative channel platform to enhance content delivery and streamline internal communications.
- Enable Home Office, Branch Teams and Field Leadership to better communicate and collaborate directly with associates using innovative tools that enable two-way communication.
- Improve and personalize user experience for all associates and branch teams.
- Improve efficiency, effectiveness and measurement of our communications and manage/leverage content appropriately.

How it Works

The unified publishing platform will allow us to plan, create, publish and measure our communications in one place. Benefits include:

- **Target communication** based on firm's data analytics and associate preferences
- **Obtain real-time updates** to assist Branch Teams in delivering the Edward Jones client experience
- **Deliver mobile functionality** that allows associates and branches to view communications on any device
- **Create two-way dialogue** with associates and branches through comments and sharing
- Develop reports with **robust metrics** and **actionable insights** for all channels
- **Integrate with other firm technology** including Microsoft Teams and SharePoint

Tentative Timeline

T1 2021	T2 2021	T3 2021
Negotiate contract with selected vendor. (Sourcing)	<ul style="list-style-type: none"> • May-June: Set up platform, develop materials and finalize rollout plan • July: Introduce platform to Home Office and small field pilot; gather feedback and make adjustments • Aug.: Introduce platform to branches in phases 	<ul style="list-style-type: none"> • Sept. - Dec.: Roll out platform to branches in phases

BUILD COALITION OF SUPPORT

- Identify key stakeholders to help champion your project at all levels
- Leverage existing associate groups to solicit feedback and provide grassroots support
- Involve the end user in the process with user experience design, focus groups, pilot users, etc.



DEVELOP EXECUTION PLAN

- Build a detailed change and communication plan outlining who, what, where, when and how
- Ask stakeholders to review messages to ensure they resonate
- Solicit feedback along the way and make adjustments
- Leverage materials and guidance from Firstup to set you up for success

Internal Communication Platform - Strategy and Content Plan

Enterprise Change & Communication

Last Updated: August 30, 2021

Project/Initiative Name: Amplify

Communication Objective:

Help branch teams and home-office associates understand (what, why) and embrace (how) the new internal communication platform will support their personal success and the firm's transformation.

Audience

- Branch Teams
- Home-office Associates

Know	Feel	Do
<ul style="list-style-type: none">• When the platform is coming• Why this change is happening• How it will impact them• How changes will benefit them• How they fit into the big picture	<ul style="list-style-type: none">• Informed about the new platform• Equipped to use the platform• Excited that the platform will make a positive impact	<ul style="list-style-type: none">• Adopt the new platform in a timely manner• Read/use the resources provided• Provide feedback• Champion the platform with others

Communication Strategies to Accomplish Objective

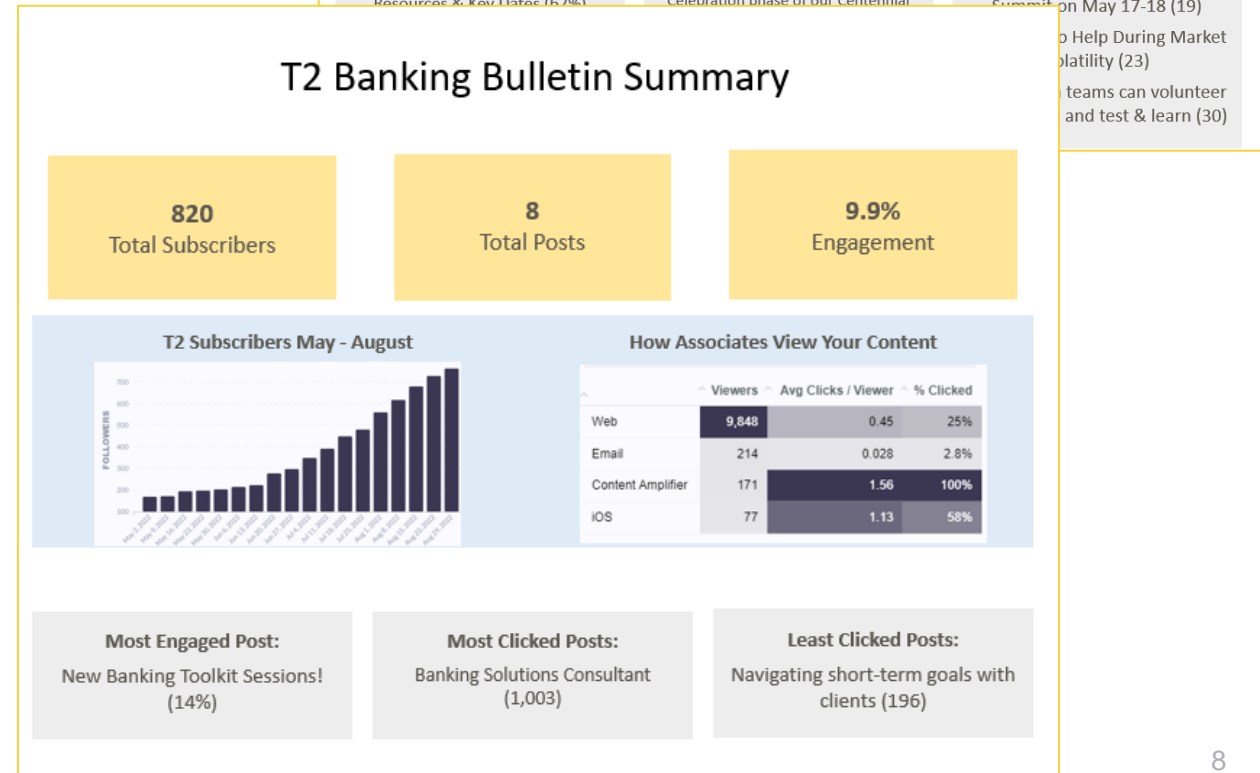
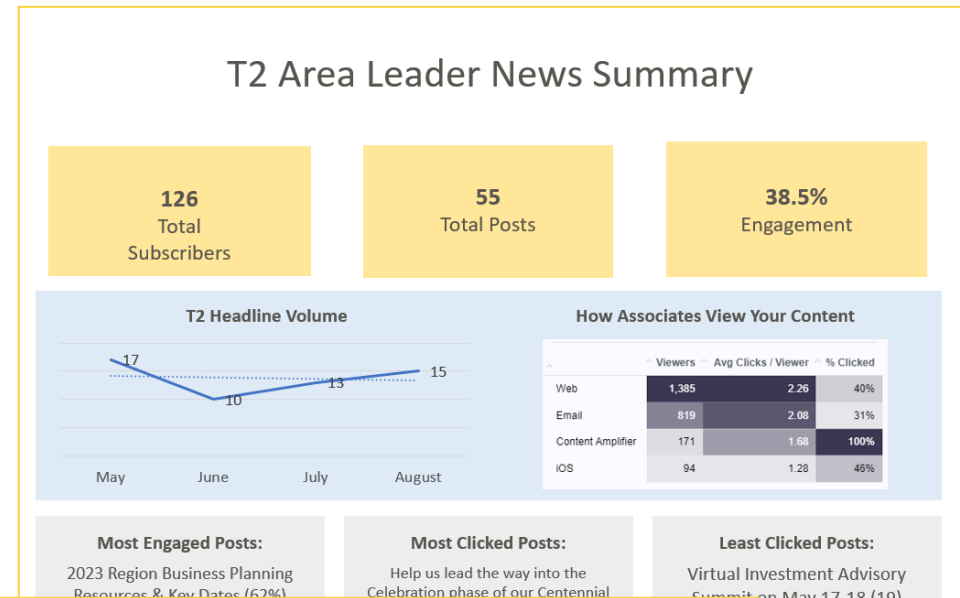
1. Create a centralized place for information about the new platform
2. Regularly communicate about the new platform to foster awareness and adoption
3. Ensure that messaging shows the connection to firm priorities, the roadmap and the overall technology/transformation updates
4. Influence the audience mindset that this platform is a positive change

Measures

- Platform adoption rate
- Survey and feedback responses
- Engagement (views, click through rate, likes, comments, etc.)

SHOW RESULTS

- Set expectations for what and how we measure success
- Develop KPIs
- Leverage tailored dashboards to communicate to stakeholder groups
- Solicit associate feedback to support quantitative results



HINDSIGHT IS 20/20

Things we wish we would've known and roadblocks we faced:

- Determine support ahead of time to clearly define ownership and reduce confusion.
- Leverage Firstup resources to be efficient and creative with the rollout and content.
- Establish advisory board early to ensure key stakeholder voices are heard.
- There will be things out of your control – don't get discouraged!

Questions?

