

**Client:**

Blue Ridge ESOP Associates, [www.BlueRidgeESOP.com](http://www.BlueRidgeESOP.com)

**Project:**

Web Application Development for ESOPConnection, Branding, Corporate Website Design, Stationery and Promotional Materials

**Background:**

Blue Ridge ESOP Associates (BREA) is one of the top three employee stock ownership plan (ESOP) firms in the US, founded in 1988. BREA manages the complex maze of calculations and allocations for ESOPs and help clients with compliance of IRS and Department of Labor (DOL) regulations.

The nature of their work is cyclical such that clients typically use BREA's services annually or more often for years on end. BREA has almost doubled its client roster over the past 2 years.

**Challenge:**

BREA was positioned as a small-town, home-grown ESOP administration firm, where their strength was their friendliness. That message only went so far, as proven by their flat growth. They also developed a simple website in-house that allowed their clients' employees to login to see their account balances; amounting to barely more than an online spreadsheet.

**Solution:****Brand**

Since administering ESOPs is beyond the skill set of many of their clients, BREA was well aware of the time wasted by their client trying to do something in which they are not proficient. All pieces in the new campaign were built around the campaign theme of "Work Smarter". The photography for each of the pieces showed a professional in a relaxed pose or situation to illustrate that life would be easier if they went with BREA.

Birch Studio overhauled their website, corporate brochure/folder and created a series of smaller, topic-driven brochures with an esthetic appropriate for an established firm in the financial industry. Their existing logo was previously rendered in a deep shade of blue, which we applied liberally throughout their materials, and complemented this color with a layout that uses clean white space and modern gray for highlighting elements. Secondary graphics such as an abstracted representation

of a ruler and modern, arrow-style bullets were created to subtly suggest precision and technological advancement.

**ESOPConnection**

To enhance their web-based tool, ESOPConnection, we reworked the navigation and content of key pages for visual appeal and information design. We duplicated the most important and frequently accessed information to the primary pages instead of being solely on deeper pages, where the information originally resided in a strictly categorical organization. The switch was from a sorting-system method of organization to a user-oriented method.

The web-based application allows users to login securely, change their password and contact information, access their account balance for current and previous years, print out a dynamically-generated PDF version of their stock certificate and project their account balance through their retirement age. A special login for client administrators gives HR and Benefits administrators the ability to gain access to individual's records and aggregate reports.

Further additions include tracking which users login, a process to allow users to opt-in to electronic notification of new documents and the accompanying legal forms to allow that, as stipulated by the DOL and IRS, the ability to export the list and to email those that consented to use electronic notification.



Brochure cover for ESOP and 401k administration services.

We integrated technologies to create a documentation and archiving system compliant with the Federal E-SIGN Act of 2000, DOL and IRS regulations. The E-SIGN system uses standard web browsers and equipment available on virtually any model and age of computer and allows users to legally fill in and execute contracts online.

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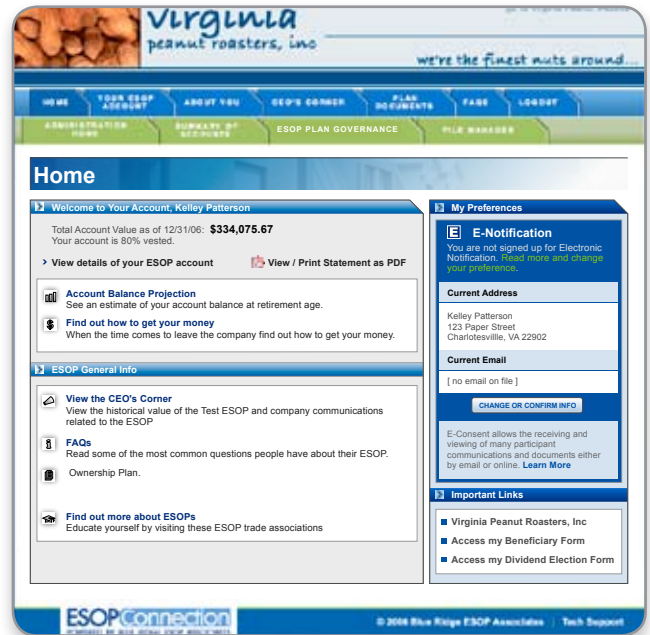
*Blue Ridge ESOP Associates, continued*

We created a back-end administrative suite that allows BREA to upload and manage copious amounts of data and multiple clients with little additional support from Birch Studio. All pieces of the application are built with a modular architecture that allows new sections to be added at later times without editing existing pieces.

**Summary:**

The result is a better looking brand that can be taken seriously as a national leader in ESOP administration and an easier to use, more full-featured web-based software which evolved from a web site into an application with over 50,000 users. The HR and Benefits departments of BREA’s clients save significant amounts of time as they have nearly eliminated the amount of requests they get for mundane information that can be easily found on ESOPConnection.

The client has reported that between the branding and software enhancements, they have moved up in the ranks to the third largest ESOP administrator in the nation, have a significant competitive advantage over their much larger rivals, and have nearly doubled the number of recurring clients in the last three years.



ESOPConnection screenshot for sample client.