

# CITI 200<sup>th</sup> Anniversary Planning Insights



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Presented by:



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# Encouraging authentic conversations; Inspiring discretionary effort; building great companies

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CONFIDENTIAL





Banks need to reconnect with Society - we can't do without banks - they are central to progress, enabling people, companies, communities to achieve their ambitions”

Stephen Hester, former CEO, RBS (Today, BBC, August 3, 2012)



Challenging environment

No appetite for good stories – no stakeholder support



# It's all about trust

MATT

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*'You remember you wanted a pony?'*

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# Background

## The Idea

- We have rebuilt our financial foundation
- Our strategy is clear
- Now we need to build on our strategy and define the kind of company we will be for the next decade, or century
- Rebuild trust and confidence
- Four focus areas: **Clients, Innovation, Brand, Talent**

“2012 is a very important year for Citi, it is our 200th anniversary and we are going to use that as an opportunity to re-launch Citi and to carve out a path of leadership in the financial industry.”

VSP, Leadership Offsite, Princeton, October 2010

# Telling the Story - Anniversary Book

Distributed hard copies to 60,000 Citi leaders and CD version to all 260,000 employees and 20,000 clients



# Primary Workflows

## Making change real

### **Client**

- Client Excellent Program rolled out, ICG version developed
- Adopt Net Promoter Score

### **Talent**

- MD Forum “Playing to Win” launch Q1
- 200 Years Citi materials for Forum, training courses, recruitment etc.
- EVP planned launch 2012

### **Innovation**

- Rolling-out Global Innovation infrastructure – incubators, training, language
- “Citi Ideas Challenge” in final stages

### **Brand**

- Develop brand positioning – launch new brand campaign March
- Closely coordinated with 200 Years Citi activities

### **Mission and Core Principles**

- Introduced by Vikram on Jan. 7, 2011
- Reinforce through employee engagement

# Communication and Engagement Goals

## All components of 200 Years Citi should

- Make 200 Years Citi tangible
- Reinforce Citi's core principles
- Celebrate the past, define the future
- Be fully integrated with Branding
- Not be ostentatious and be in tune with the local economic sentiment
- Fire up employees at all levels – restore pride
- Proactively connect with clients and customers – a “New Citi”

# Breaking Through the Clutter: 200YC Website

200YearsCiti website became an engagement destination



- 5 million page views in 18 months
- **Established as main source of information (jumped from 30% to 80% in 12 months)**
- More than 240,000 unique visits to the 200 Years Citi site

# Digital Timeline

Interactive, engaging, live timeline featuring 300 stories and 500 images from the Anniversary Book + client version



# Photo Challenge

Reinforced awareness of Citi's principles by engaging employees to represent the principles through photography

**photo**  
**CHALLENGE**

Employees submitted photos of what the principles mean to them and colleagues were able to vote on their favorite images.

**Morteza Abtahi**  
North America | Leadership

**Catalin Pobega**  
EMEA | Common Purpose

**William Abarca**  
LATAM | Ingenuity

**Jan Lee Chan**  
Asia Pacific | Responsible Finance

**3,900** PHOTOS  
SUBMITTED

**40%** OF EMPLOYEES  
WITH INTRANET ACCESS VOTED

MORE THAN  
**315,000** VOTES

# New Year's Card Challenge

493 children of Citi employees shared their New Year's plans  
33,000 votes were cast on favourite artwork

**200YEARS CITI**

**Aashna | APAC | 12 years old**  
CITI HAPPY NEW YEAR

**Kaaryunya | EMEA | 9 years old**  
2012 HAPPY NEW YEAR

**Marifer | LATAM | 12 years old**  
Happy New Year

**Victor | Mexico | 3 years old**

**Nicolas | LATAM | 5 years old**  
Top Selection  
2011 2012

## New Year's Card Challenge

**How does your family celebrate the New Year?**

In October 2011, we asked the children of Citi employees to submit artwork showing how they celebrate the New Year. A digital New Year's card was developed from some of the submissions and was sent to colleagues to mark the beginning of Citi's 200th year (a separate card with images from the Timeline was sent externally to Citi's clients). Submissions represented the personal celebrations of Citi families across the globe, while capturing some of the themes that make Citi great - our global partnerships, diversity and common purpose.

# Citi Ideas Challenge

What's your vision of the banking future? Colleagues answered through Citi's crowd-sourcing ideation platform

A graphic for the Citi Ideas Global Challenge. It features a central globe composed of various icons representing banking, technology, and nature. A blue ribbon flows around the globe. The background is dark blue with white clouds and a small figure of a person at the bottom right. Text on the right side lists statistics: 40 Citi Ideas Campaigns through August 2012, more than 2,300 ideas submitted, more than 46,000 employees participated, and 97 countries represented. The Citi logo is in the top left corner.

200 YEARS Citi

40 CITI IDEAS CAMPAIGNS THROUGH AUGUST 2012

MORE THAN 2,300 IDEAS SUBMITTED

MORE THAN 46,000 EMPLOYEES PARTICIPATED

97 COUNTRIES REPRESENTED

## Citi IDEAS GLOBAL CHALLENGE

### What's Your Vision Of The Future Of Banking?

In October 2011, Citi launched a 'Future of Banking' global challenge, encouraging all employees to contribute their ideas for new products and services to define Citi's next 200 years. Using a crowd-sourcing ideation platform called Citi Ideas, employees submitted ideas, collaborated virtually with colleagues, and voted on the ideas they thought would have the biggest impact. The two winning teams met in Dublin to unify their ideas—**Predictive & Proactive Banking** and **Family Banking**. Incubated by Citi Ventures and the Consumer business, the first product prototype was shared with CEO Vikram Pandit in August 2012 with the goal of bringing it to market in early 2013.

# Proud Challenge

3,000 statements showcasing what makes employees feel proud - supported and cheered on by 32,000 employees



# Global Community Day

A Citi tradition: Volunteering time, talents and passion on June 16

COMMEMORATING CITI'S 200<sup>TH</sup> ANNIVERSARY BY **GIVING BACK** to **OUR COMMUNITIES**

**CITI GLOBAL COMMUNITY DAY** JUNE 16, 2012

FOR 200 YEARS, CITI HAS BEEN A PART OF THE COMMUNITIES WE SERVE THROUGHOUT THE WORLD



**IN 2012**  
AT VOLUNTEER  
EVENTS  
AROUND THE WORLD

**100,000+** VOLUNTEERS  
**GAVE** **500,000** HOURS AT  
**1,300** EVENTS THAT SERVED  
**92** COUNTRIES AND **495** CITIES

TOP 5 CAUSES  
ACROSS THE GLOBE

- CHILDREN & YOUTH
- HUMAN SERVICES
- ENVIRONMENT
- AFFORDABLE HOUSING
- FINANCIAL EDUCATION & LITERACY

# Fitness Challenge

Increased activity among Citi employees one step at time for a donation to three global charities



## Citi® Fitness Challenge

**2,643,507,451**

CITI FITNESS UNITS SUBMITTED\*

**20,003**

ACTIVE PARTICIPANTS



**\$83,460.45**  
DONATED



**\$38,888.31**  
DONATED



**\$77,651.24**  
DONATED

# Brand Positioning Research

## Commemorate to Celebrate

- Rejuvenate the global Enterprise brand overnight
- Get the story out – inform
- Create permission to talk in a strong and confident way – reframe the conversation
- Build a brand that our current and prospect clients want to belong to
- Remind audiences of the vital role of banks in progress

Research tells us that “chapters” in Citi’s 200-year history can completely change views of the brand, but.....

**NO SEPIA:** Celebrate the Past – Define the future

# Anniversary Events

Countries from around the world commemorated the anniversary with local events for clients and employees

**200 YEARS CITI**

**NAM**

**EMEA**

**APAC**

- Australia
- China
- Hong Kong
- India
- Indonesia
- Japan
- Korea
- Malaysia
- New Zealand
- Philippines
- Singapore
- Sri Lanka
- Taiwan
- Thailand

**LATAM**

**MORE THAN 130 EVENTS**  
PLANNED AROUND THE WORLD IN OVER 70 COUNTRIES

**ALMOST 20,000 ATTENDEES**  
INCLUDING EMPLOYEES AND CLIENTS, WORLDWIDE

Former CEO Vikram Pandit rings the bell at the New York Stock Exchange in celebration of Citi's 200th anniversary on Monday, 18 June. Across the world, Japan CEO Peter Eliot rings the Tokyo Stock Exchange bell on the same day.

# Advertising Campaign

The external recognition of 200 Years Citi ,telling the story of 200 years of enabling progress for its clients

## 200 Years Citi Advertising Campaign

The external acknowledgment of 200 Years Citi featured an advertising campaign telling the story of Citi's 200 years of enabling progress for our clients. The ads ran in eight languages in television, in print and online and depict our rich history and heritage of innovation. The media buy originally focused on 11 markets and reached over 200 in total.

**1866**  
HOW THE KINGDOM AND THE STATES BECAME UNITED.

**1904**  
CITI MEETS ROOSEVELT. ATLANTIC MEETS PACIFIC.

**1948**  
MARSHALL HAD A PLAN. LUCKILY, SO DID WE.

**1977**  
HOW A 36-HOUR BLIZZARD PAVED THE WAY FOR THE 24-HOUR ATM.

200YEARS **citi**

# FT/Citi Ingenuity Awards: Urban Ideas in Action

## Successfully launched new initiative to identify and celebrate the innovations transforming the world's cities



- Four regional forums were held in Hong Kong, São Paulo, D.C. and London, with the awards dinner and winner announcement in New York City
- 10 high-profile subject matter experts were engaged for judging panel
- The multi-faceted programming engaged broad set of stakeholders, from clients and prospects to industry thought leaders and innovators

# Olympics – “Thank you America”

Engaged employees around Olympics sponsorship with Pin Challenge and Citi Team USA Flag Tour



**Together for Team USA**

Citi was proud to be an official sponsor of the 2012 U.S. Olympic and Paralympic Teams. For over 200 years, Citi has supported those on the road from ambition to achievement; this year we were pleased to help America's Olympic hopefuls as they made the journey to the London 2012 Olympic and Paralympic Games.

# Making Change Real – Inside Out Approach

“The best is ahead of us; what will you do to help write the next chapter?”

## Capture Imagination Internally

- 200YC web site almost 4 million views since launch
- Photo Challenge 4000+ submissions, 40% with access voted
- Citi Music - 700+ employees auditioned from 50 countries
- Citi Ideas – 10% with access voted
- Launched New Year’s Card program
- New programmes in 2012 – Proud campaign for GCD

## Make Change Real

- Launched Mission and Principles
- Roll-out Client Excellence
- Create new innovation infrastructure
- Revamp University of Banking programs
- Reposition Brand - 200 forms launch pad for Progress
- Global advertising campaign
- Launch Alumni

## Leverage 200YC Externally

- Leverage locally, partnership with FT and INSEAD for Urban Ingenuity Awards
- Engage clients on shared progress with 2012 Events
- Captivate external audience with a 200YC Ad Campaign
- Generate social media content

# Social Media Results Snapshot

**135M+ Impressions, 16M+ Unique Reach, 239K+ Engagement Activities\*, 98.7% Positive Sentiment, 30K+ New Followers**

## Activity driven by owned channels

Channel	Impressions through Social Activity (6/11-6/18)	Engagement Activity	Sentiment
Twitter	19,441,387	6,902 <i>(Unique Tweets &amp; Retweets with the #200YearsCiti Hashtag, Link Clicks)</i>	98.7% Positive <i>*Based on content that the measurement tool is able to assess</i>
Facebook	20,001,620	50,081 <i>(Page Likes, Post Likes, Comments, Shares)</i>	97.5% Positive
LinkedIn	220,064	773 <i>(Post Likes, Comments, Shares)</i>	100% Positive
<b>Total</b>	<b>39,443,007</b>	<b>57,756</b>	<b>98.7% Positive</b>

## Activity driven by paid promotion

Channel	Impressions through Paid Promotion (6/14-6/16)	Ad Clicks	Social Engagement Activity Resulting from Ads
Twitter	2,070,524	16,922	375 <i>(Retweets and Replies)</i>
Facebook	94,000,000	164,784	469,365* <i>[Still being tabulated]</i>  <i>Page Likes, Page Post Likes, Page Post Views, Comments on Page Post, Page Post Shares, and Page Photo Views)</i>
<b>Total</b>	<b>96,070,524</b>	<b>181,706</b>	<b>469,740</b>

# Partner Support in Social Media

**Mike Bloomberg** @MikeBloomberg  
 Congratulations @Citi #200YearsCiti  
 Expand

**Buddy Media** @BuddyMedia  
 Congrats @Citi on your 200th and Team Citi for completing nearly half a million hours of community service to celebrate today!  
 #200YearsCiti  
 Expand

**Citi Open** @CitiOpen  
 Happy 200th Anniversary to our partner, @Citi! Nearly 100K will be volunteering today as part of their Global Community Day  
 #200YearsCiti  
 Expand

**Bob Bryan** @Bryanbros  
 Happy 200th Anniversary to @Citi #200YearsCiti. Please help support Team Citi #EveryStep at [citi.us/1Yz6g](http://citi.us/1Yz6g)  
 Expand

**INJAZ** @INJAZorg  
 Congrats @Citi on your 200th Anniversary, thank you for your continuous support! #200YearsCiti  
 Expand

**Junior Achievement** @JA\_USA  
 Happy 200th Anniversary to @JA's partner, @Citi! Nearly 100K will be volunteering today as part of their Global Community Day  
 #200YearsCiti  
 Expand

**The Presidents Cup** @PresidentsCup  
 Happy 200th Anniversary to our partner, @Citi! Nearly 100K will be volunteering today as part of their Global Community Day  
 #200YearsCiti  
 Expand

**United Way** @UnitedWay  
 Happy 200th Anniversary to @Citi! Nearly 100K will volunteer today as part of their Global Community Day #200YearsCiti #LIVEUNITED  
 Expand

**USA Gymnastics** @USAGym  
 Congrats @Citi on your 200th! You can support @DanellJLeyva and Future Stars with just a click here: [ow.ly/bBhPS](http://ow.ly/bBhPS) #200YearsCiti  
 Expand

**NRPA news** @NRPA\_news  
 Our partner @Citi celebrates its 200th Anniversary tmrw w/ Global Community Day: tens of thousands giving back to the community  
 #200YearsCiti  
 Expand

**NY Red Cross** @redcrossny  
 @Citi employees assemble #redcross fire clean-up kits.  
 #200YearsCiti [twitpic.com/9x49mf](http://twitpic.com/9x49mf)  
 Hide photo Reply Retweet Favorite



**Habitat for Humanity**  
 Saturday via HootSuite

Happy 200th anniversary to Habitat's partner, Citi. To mark the occasion, today is the Global Community Day across 92 countries, with tens of thousands volunteering – many with Habitat. Find out more at [Facebook.com/Citi](http://Facebook.com/Citi). <http://ht.ly/bxvtC>

Citi | Facebook  
[ht.ly](http://ht.ly)

**Habitat Greater SF** @HabitatGSF  
 Follow

ICYMI 130+ @Citi volunteers joined us i Hilltop & Adam Rogers Parks Saturday for #200YearsCiti. Check out this crowd!  
[pic.twitter.com/ALKcrSqs](http://pic.twitter.com/ALKcrSqs)  
 Reply Retweet Favorite



**(NYSE) NYSE Euronext** @NYSE\_Euronext  
 @Citi CEO Vikram Pandit rang the #NYSEBell to celebrate #200YearsCiti. Lookin' good! [pic.twitter.com/DGxyUW4E](http://pic.twitter.com/DGxyUW4E)  
 Hide photo Reply Retweet Favorite




## Campaign Impressions

Employees were galvanized around the anniversary through strong internal communications and targeted initiatives

Employee sentiment was overwhelmingly heartfelt and positive:

- Examples available

## Key Learnings – innovative thinking for sustainable success?

- **1. Great purpose**
- **2. Engage Early**
- **3. Expand the possible**
  - **Shaw: No progress without change**
  - **Responsible finance**
  - **Citi Music**

# Citi® Music

A global music video highlighting the collective talent of employees

**200 YEARS Citi**

# Citi® Music

**What have you done today to make you feel proud?**

Citi employees from over 50 countries came together to perform a rendition of the song "Proud" by Heather Small and Peter John Vettese.

**1,400**  
EMPLOYEES  
AUDITIONED

**23**  
ON-SITE RECORDINGS  
IN CITIES AROUND  
THE WORLD

**200+**  
SCREENINGS  
AT INTERNAL  
EVENTS

**330**  
EMPLOYEES WERE FEATURED  
IN GROUP AUDITIONS

**60,000**  
YOUTUBE AND  
INTERNAL BROADCAST  
CENTER VIEWS

The graphic features a large blue background with a grid pattern. It includes several inset photos: a woman playing a piano, a man singing into a microphone, a group of people playing instruments, and a collage of many small photos of employees. The Citi logo is in the top left and bottom right corners.



Seeing the finished product  
(The Proud song) live on stage  
this evening blew me away and  
made me proud to be part of this  
company, a feeling that's been  
suppressed for a long time.

200 Year event attendee.





This is just what I needed  
to keep on track of my  
fitness, knowing that my  
success will also contribute  
to Habitat for Humanity.  
This is a genius idea!

Fitness Challenge active employee





You all totally one-upped every other online holiday greeting I received this year. Thanks for bringing joy to the end of a busy week. E-Card recipient



# 200 Years Citi Programs

## Activity snapshot

<b>200 Years Citi Website</b>	<ul style="list-style-type: none"> <li>• Interactive intranet site housing all new 200 Years Citi programs</li> <li>• 240,000 unique visitors and nearly 5 million page views in 17 months</li> </ul>
<b>Citi Music</b>	<ul style="list-style-type: none"> <li>• Global music video highlighting the collective talent of Citi employees</li> <li>• Final video featured 1,100 employees throughout 50 countries</li> </ul>
<b>Anniversary Book/Timeline</b>	<ul style="list-style-type: none"> <li>• More than 300 stories throughout four regions told the story of Citi's 200 year history</li> <li>• 60,000 copies of the book distributed to seniors and select clients, with a CD and Digital Timeline version for all employees</li> </ul>
<b>Proud Challenge</b>	<ul style="list-style-type: none"> <li>• A platform for employees to share a brief statement about what makes them feel proud</li> <li>• 3,000 Proud Statements were submitted, with 32,000 "Makes Me Proud Too" clicks</li> </ul>
<b>Photo Challenge</b>	<ul style="list-style-type: none"> <li>• Employees submitted images relating to the core principles:</li> <li>• 3,900 photos submitted; 40% of employees with intranet access voted for regional or global winners</li> </ul>
<b>New Year's Card</b>	<ul style="list-style-type: none"> <li>• Employees' children around the world submitted drawings showing how their family celebrates the New Year</li> <li>• 500 children submitted drawings</li> </ul>
<b>Ingenuity Awards</b>	<ul style="list-style-type: none"> <li>• FT/Citi Ingenuity Awards recognizes organizations that have developed solutions to urban challenges</li> <li>• Received more than 150 submissions from 40 countries</li> </ul>
<b>Global Community Day</b>	<ul style="list-style-type: none"> <li>• Colleagues from around the world volunteered and gave back to their communities on the Anniversary day</li> <li>• Recruited 110,000 employees, who volunteered 500,000 hours in 92 countries and 495 cities</li> </ul>
<b>Citi Fitness Challenge</b>	<ul style="list-style-type: none"> <li>• The Fitness Challenge encouraged employees to increase their fitness with a donation to charity</li> <li>• 49,378 employees enrolled in the Challenge; 20,003 employees actively participated</li> </ul>
<b>Events</b>	<ul style="list-style-type: none"> <li>• Country events were held to commemorate the anniversary and celebrate the efforts of clients and employees</li> <li>• 14,000 clients and 13,000 employees attended events across 70 countries and 90 cities worldwide</li> </ul>



**THANK YOU!**

For Assistance with Planning Your Milestone  
Anniversary,  
Please Contact, [lisa@anniversary-university.com](mailto:lisa@anniversary-university.com)



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