

J&L Communications

Capabilities & Case Studies

Turning B2B expertise into market authority and pipeline growth

Most B2B firms don't have a marketing problem. They have an *execution* problem.

Limited bandwidth. Inconsistent visibility. Content without impact. Strategy that stalls.

We fix it by...

- Clarifying your unique expertise
- Translating it into compelling content and campaigns
- Building systems that scale visibility and pipeline

Result: Faster execution. Stronger differentiation. Real growth.

We help marketing leaders in expert-led firms turn complex thinking into market authority.



Capabilities *Overview*

We understand the realities of limited bandwidth, competing priorities, and the need to balance creativity with credibility.

Brand, marketing and PR

- Brand strategy
- Marketing campaigns
- Strategic creative planning
- Media relations
- Media and marketing collateral development

Content development

- Thought leadership
- Surveys
- Blog and articles
- Speech writing
- Presentations
- Impact reports

Creative & design

- Visual identification strategy
- Creative theme development and asset creation for branded events
- Branded templates
- Style guides
- Infographics and animated graphics
- Animated PowerPoint Presentations

Digital & social media

- Website design and UX
- SharePoint design and development
- Digital strategy and planning
- Search engine optimization and marketing (SEO and SEM)
- Digital advertising
- Social media audits, trainings, post writing, creative asset creation
- Community management

Video production

- Sizzle reels and videos
- Storytellers
- Testimonials
- Training videos
- Video editing
- Corporate announcements
- Animation
- Live event and webcast coverage
- Full post-production capabilities

Seasoned. Practical. Trusted. Senior-led delivery from strategy to scale.

Survey-to-Revenue Engine

⚡ POWERED BY POTLOC

We've partnered with Potloc, a leader in high-quality executive surveys, to deliver data-driven insights that journalists, analysts, and AI notice — and that your client-facing teams can actually use. This is how we help experts sell their expertise: with credible, ownable data that opens doors and builds trust.

Our end-to-end survey approach creates **Credible, ownable data that opens doors and builds trust.**



Client Case Study: “Modernization in Motion” with Cherry Bekaert turned CFO insights on finance modernization into a flagship report and multi-channel campaign. Results included:

- 30+ client wins in first cycle
- 18.8% conversion rate
- #1 search rankings vs. competitors
- 1.28M reach with strong engagement

J&L KEYSTONE PROGRAMS

The Frontrunner Program: Build Executive Authority on LinkedIn

Why it matters

50%+ of decision-makers consume thought leadership content over 1 hour every week.

4 out of 5 LinkedIn members influence business decisions — across 800 million users.

We help your leaders become recognized subject-matter experts on LinkedIn without adding burden. The Frontrunner Program delivers tiered, practical support so executives can build authority, grow their network, and drive pipeline. Over 6 years, J&L has trained executives and managed accounts with measurable results within months.

Available in 4 Tiers:

BRONZE

SILVER

GOLD

PLATINUM

Results our clients see:

20%

Increase In Followers

25%

Higher Engagement Rate

25%

More Views On Average





The
FRONTRUNNER
Program

Plan Comparison

FEATURE	WHAT'S INCLUDED	BRONZE	SILVER	GOLD	PLATINUM
J&L AUDIT	Two-page personalized audit with LinkedIn profile review and Google Search review with recommendations.	✓	✓	✓	✓
TRAINING SESSION	Virtual interactive session with experts from J&L Communications.	✓	✓	✓	✓
CONTENT RECOMMENDATIONS	Weekly delivery of relevant articles with copy and recommended hashtags sent to you every week to post on your LinkedIn account.		3 PER WEEK	5 PER WEEK	✓
ENGAGEMENT RECOMMENDATIONS	Weekly email delivery of LinkedIn engagement opportunities and the recommended responses for each.		5 PER WEEK	10 PER WEEK	✓
CONTENT CALENDAR	Shared calendar and content document aligned with predetermined themes. We will work with your teams to understand planned content being released and will incorporate.		✓	✓	✓
QUARTERLY REPORTING	Social Media Progress report with detailed metrics and breakdown on profile performance, content performance, SSI performance, and more on your behalf.		✓	✓	✓
ACCOUNT MANAGEMENT	J&L fully manages your account and takes care of all content publishing and community engagement.				✓

Our approach

The right level of support for every marketing need

How we operate

Working together



No process for process' sake

We keep workflows simple, clear, and built around your needs.



Senior operators, not junior leveraged

Experienced decision-makers who can move quickly and provide strategic direction.



Flexible models — retainers with rollover

We provide Options including retainers, rate cards, and expanded services with the flexibility to roll over unused time.



Right-sized resourcing

With transparent tracking against your agreed retainer.



Always-on support + proactive ideas

A responsive, scalable team to handle day-to-day briefs and global demand. We co-create flexible workflows with you and rapid 24-hour brief acknowledgements.



Commercially focused, not just creative

We don't just deliver assets. We drive outcomes focused on your growth needs.



Easier integration with in-house teams

We operate collaboratively within the client's teams to drive efficiency, continuity, and stronger outcomes.



Expanded digital capability

Expertise across digital, animation, Ceros, GIF/iPDF, social content, as well as traditional formats.

A Scalable Creative Model Built for Your Needs

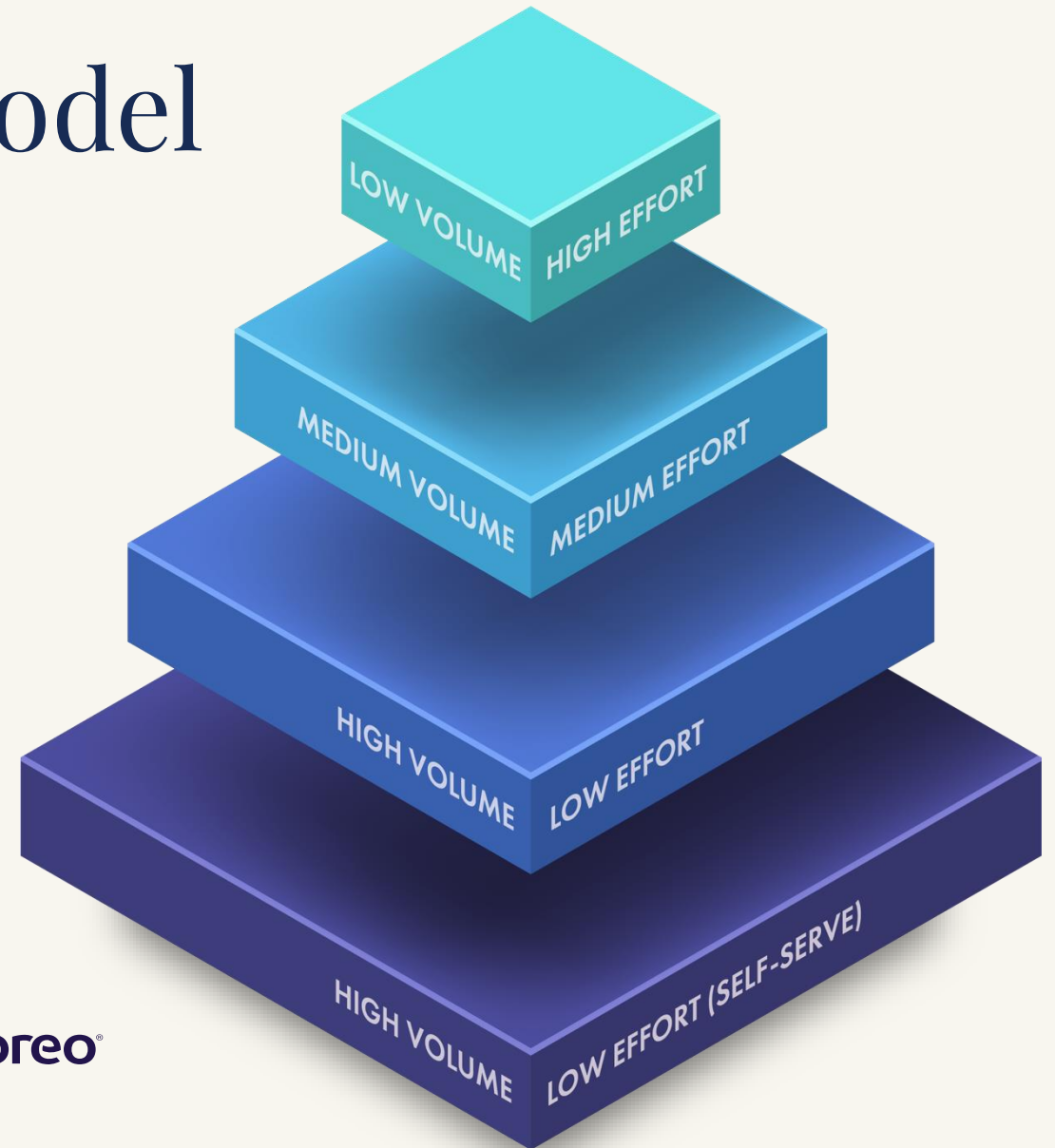
We operate on a tiered creative model that gives you exactly the level of support you need—whether it's high-touch strategic work, medium-touch branded content, or low-touch, high-volume production.

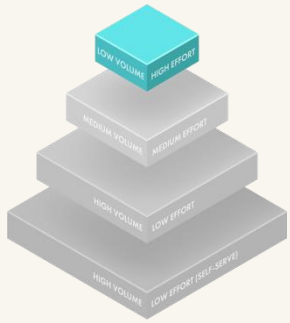
The right level of support for every marketing need without overbuying strategic resources or under-supporting execution.

We already manage this full pyramid of work for several clients today, and we're built to flex across complexity, speed, and scale.



Choreo®





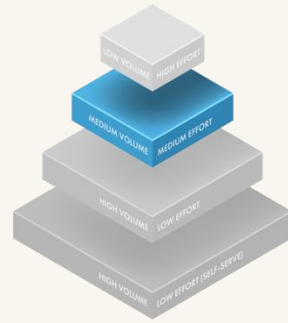
TIER 1

High-Effort, Low-Volume (Strategic + Creative Leadership)

These are high-visibility, high-impact initiatives that require deeper thinking, multiple iterations, senior-level involvement, and premium creative output.

Deliverables include:

- Brand films and high-end video production
- Messaging platforms and master narratives
- Full campaign development
- Event creative and experience design
- Executive keynote development
- Flagship thought leadership and signature reports



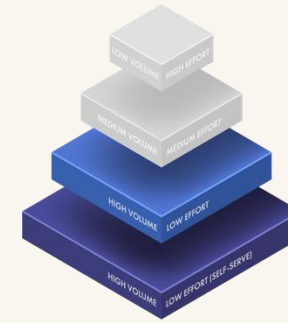
TIER 2

Medium-Effort, Medium-Volume (Core Content Engine)

This tier represents the majority of day-to-day needs – content that must be high quality, on brand, and consistent, but doesn't require the same depth of craftsmanship as Tier 1.

Deliverables include:

- Executive presentations and keynote decks
- Client sales tools and pitch materials
- One-pagers and product sheets
- Social media content
- Light-to-moderate copywriting
- Standard infographics, diagrams, and campaign assets



TIER 3

Low-Effort, High-Volume (Template-Driven + Self-Serve)

Where speed, repetition, and scale matter most. We build systems so your teams can self-serve with confidence, while we stay on hand to refine or escalate when something more strategic is needed.

Deliverables include:

- Customizable slide decks and presentation templates
- Copy-and-paste content blocks
- Standardized one-sheeters
- Evergreen content libraries
- SharePoint-based resource hub
- Quick-turn formatting, resizing, and versioning

J&L Communications Leadership Team

With more than 20 years of combined agency and client-side B2B marketing experience in highly regulated industries, we built J&L Communications to deliver the kind of senior, flexible support we once needed ourselves. We embed alongside your team, translating complex expertise into clear, credible go-to-market strategies that build authority and drive results.



Jennifer Compton
CEO & Founder

Strategic communications advisor and brand builder specializing in media, executive visibility, and go-to-market strategy.



Rob Henderson
Partner

Combines agency and client-side experience to deliver marketing strategies that maximize ROI and elevate client experience.



Matt Cummings
Senior Social Media Manager

Leads social strategy with a focus on storytelling, platform trends, and AI-enabled content that drives measurable engagement.



Bhagyaraja Swamy
Digital Marketing Lead

Leads digital campaign strategy and execution, aligning performance marketing with broader business objectives.



Peter McKinley
Americas Creative Director

Former EY Global Brand Ambassador who transforms complex ideas into compelling visual and experiential brand expressions.



Eduardo Abril
EMEIA Creative Director

Brand and UX strategist who translates business insight into impactful visual experiences across global markets.



Christian Montalbano
Video Lead

Award-winning creative producing high-impact video and animation rooted in storytelling and cross-disciplinary expertise.



George Middlebrooks
Website Designer & Developer

20+ years designing and building digital experiences across healthcare, education, media, and financial services.

We are senior operators embedded with you.



Proven Results Driving Growth

A selection of recent client successes

Case Studies

01 **Scott+Scott**
A brand refresh turns into ongoing partnership

02 **Clyde & Co**
Supporting partner communications

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The Vault sales enablement platform

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Turning Data into Impact, How the Economic Impact Report Drives Supplier Diversity and Business Growth

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10 **Cherry Bekaert**
Modernization in Motion - Turning CFO Insights into Strategic Advantage

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An Environmental Sustainability Consultancy's Brand Refresh

12 **Tegria**
Unifying a New Brand

13 **Advent Health**
Medical Staff Excellence Awards

14 **Smarter Together**
Building Choreo's CPA Alliance for Growth

15 **Chartis**
Digital Transformation Survey Marketing

16 **American Equity**
A Full-Spectrum Marketing Partnership

17 **Equitable**
Integrated Communications Strategic Partner

Case Studies

Scott + Scott's brand refresh

Overview:

Scott+Scott LLP is a premier litigation firm representing institutional investors in high-stakes securities, antitrust, and consumer protection cases across the U.S., Canada, and Europe. With over 140 attorneys and offices in 12 jurisdictions, the firm is known for its global portfolio monitoring and landmark recoveries totaling billions.

Business challenge:

Scott+Scott initially approached J&L for a refresh of its client-facing materials as part of a broader rebrand. But as we aligned on their goals—strengthening global credibility, personal service, and leadership in complex litigation—it became clear the firm needed more than updated templates. They needed an ongoing design partner to deliver a consistent, scalable system across every client touchpoint.

Since 2022, J&L has served as Scott+Scott’s retained creative partner, providing continuous strategic and visual support across client communications, conferences, global initiatives, and near-daily design needs. Our work ensures the firm’s materials remain modern, cohesive, and aligned with its position as a leader in complex litigation.

Solution

Working closely with Scott+Scott’s communications lead, we provide ongoing creative direction, design execution, and content refinement across multiple channels. Key deliverables include:

- **Welcome Brochures:** A comprehensive, print-ready piece designed for onboarding new clients, customized for each global branch. Featuring a personal greeting from Managing Partner David Scott, the brochures articulate the firm’s client-first philosophy, litigation strategy, and global coordination.
- **Firm Profile:** A deep-dive document showcasing Scott+Scott’s litigation history, practice areas, international offices, and proprietary PT+® portfolio monitoring system. Continuously updated to support RFPs, board presentations, and investor communications.
- **Flip Card (PDF):** A high-impact, two-page summary for events and quick reference. Highlights Scott+Scott’s top settlements, global footprint, and contact information, integrating QR codes for digital engagement.

Creative Highlights

- **Tone & Messaging:** We position Scott+Scott as both a trusted advisor and a global gatekeeper, using language that is confident, clear, and client-centric.
- **Design Strategy:** The evolving visual system incorporates brand colors, legal accolades, and attorney photography to humanize the firm and build credibility.

Ongoing Impact

- Reinforce its leadership in securities and antitrust litigation.
- Build trust with institutional clients through transparency and personalization.
- Support global expansion, including new regional offices and affiliate launches.
- Ensure brand and message consistency across all client interactions—from onboarding to international conferences.



Case Studies
Clyde & Co.

Supporting Global Partner Communications (1/2)

Overview:

Clyde & Co. is a leading global law firm specializing in insurance, transportation, energy, infrastructure, and trade. With more than 60 offices across six continents, the firm advises clients on risk, dispute resolution, and commercial law in some of the world’s most complex and regulated sectors. Known for its forward-thinking leadership and global cohesion, Clyde & Co. consistently ranks among the world’s top firms by both revenue and reach.

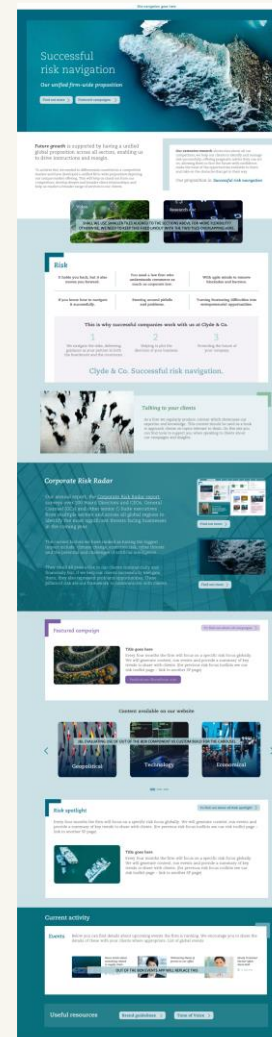
Business requirements:

Clyde & Co. needed support to ensure continued impact of its global partner communications - ensuring consistency across regions, maintaining confidentiality, and delivering engaging, contemporary experiences for its leadership and partnership audiences.

Solution

Working as an extension of Clyde & Co.’s internal communications and leadership teams, J&L delivers end-to-end creative, content, and production support across several core initiatives:

- **Partner Conference:** Since 2021, we’ve supported the annual partner conference from concept to completion – from selecting and managing production partners, overseeing project management, to crafting impactful creative experiences that bring the firm’s strategy and culture to life.
- **Regional Partner Events:** We provide project management and on-site support for regional leadership meetings and events, ensuring seamless execution and brand alignment.
- **Annual Report:** J&L supported content development for the firm’s confidential annual report, working closely with key stakeholders to produce two versions (with and without remuneration details), ensuring security, accuracy, and timely delivery.
- **AGM:** Supporting content development and production for the Annual General Meeting, including coordination and filming of the video broadcast shared with partners globally.
- **SharePoint Site:** Designed and developed the Strategic Risk Navigation SharePoint page, featuring custom web applications and bespoke digital tools – including the *Corporate Risk Radar*, an interactive experience launched at the 2025 partner conference.
- **Social Media:** We guided both corporate and personal branding efforts, developing content and campaign materials. Our support extended to LinkedIn advertising – optimizing content, process, and technology to enhance engagement and visibility.



Case Studies

Supporting Global Partner Communications (2/2)

Creative impact

Tone & Messaging: Our content and design approach balances discretion with dynamism – translating complex, confidential communications into clear, engaging narratives.

Design Strategy: Clean, confident, and contemporary visual systems align with Clyde & Co.’s global brand, emphasizing clarity, consistency, and accessibility across print, video, and digital platforms.

Ongoing partnership and impact

Since 2021, J&L has supported as Clyde & Co.’s strategic communications across multiple firmwide initiatives. Our role combines creative direction, project management, design execution, and content development to ensure every touch point reflects the firm’s global scale, consistency, and culture of collaboration.

Our partnership with Clyde & Co. continues to:

- Strengthen cohesion and consistency across global partner communications.
- Enhance leadership engagement through immersive event experiences.
- Ensure confidentiality and accuracy in high-stakes materials such as the annual report and AGM.
- Support innovation in digital communication through tools like the Corporate Risk Radar.
- Elevate the firm’s visibility and thought leadership through refined social and corporate branding.



Case Studies

The Vault: Sales enablement platform

SharePoint user experience

CDW is a global technology solutions provider with over 20,000 employees and revenues of \$17B helping organizations leverage IT to drive business outcomes.

We created a single, unified sales enablement platform that centralizes all marketing collateral, case studies, programs, and tools. The new system streamlines content management, boosts discoverability, and gives sales teams faster access to the resources they need, ultimately improving consistency, efficiency, and campaign execution across the business.

Approach

- Consolidated 25 disconnected sites into one cohesive platform to eliminate duplication and outdated content.
- Designed custom apps and visual layouts so sales teams can easily find, access, and share key resources.
- Built a dynamic content flow and tagging system that updates all sections automatically, reducing manual effort.
- Enabled clickable tags, saved searches, and an improved search experience to enhance content discovery and knowledge sharing.
- Established predefined layouts and branding for a consistent and professional look across all materials.
- Developed a suite of on-brand templates — including PowerPoint, Word, Excel, social asset formats, email layouts, proposal decks, one-pagers and brochure styles — to support intuitive, self-serve content creation across the business.

Outcome

- A unified, intuitive platform that supports sales teams globally with reliable, up-to-date content.
- Strong user adoption, reaching 200k visits per month.
- Frequent access and use by senior marketing, sales and BD leaders.
- Recognized internally as “the place where marketing campaigns come to life”.



Case Studies

Turning Data into Impact: How CDW's Economic Impact Report Drives Supplier Diversity and Business Growth



Overview:

CDW sought to amplify the impact of its Supplier Diversity Program by transforming raw data into a compelling, insight-driven narrative. With billions in diverse supplier spending, the goal was to ensure that these efforts were more than just figures—they needed to showcase real economic influence, foster engagement, and drive meaningful action across internal teams, external stakeholders, and the broader business community.

Business challenge:

CDW needed a partner with data analysis, narrative and storytelling, and creative skills to reimagine its Economic Impact Report, turning data into dynamic digital storytelling. From interactive reports to social media campaigns, website content, and internal resources, the challenge was clear: make the numbers matter and create a campaign with lasting impact.

Solution:

Data Visualization & Storytelling:

- Transformed the Economic Impact Report into an **interactive digital experience** with dynamic charts, impact heatmaps, and industry benchmarks.
- Used data storytelling techniques to show how supplier diversity contributes to business growth, economic impact, and community development.
- Developed infographics, animated graphs, and a dashboard that tracks ongoing progress.

Multi-Format Content Strategy:

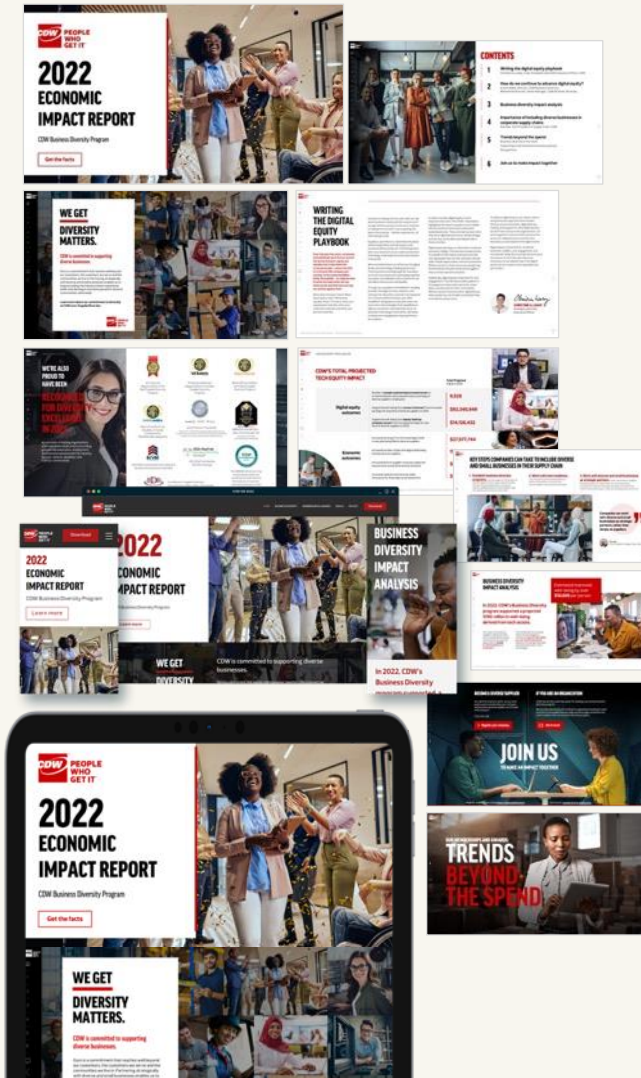
- Developed an **interactive landing page** housing all insights, case studies, and program impact.
- Created a **short-form video content** (motion graphics + expert interviews) to simplify key data points for social media.
- Developed a **downloadable toolkits** for diverse suppliers and clients to help them navigate the program.

Engagement-Driven Digital Campaign:

- Expanded Kristin Malek's leadership position by **positioning** her as a thought leader on LinkedIn through long and short form post amplification and follower campaigns.
- Leveraged **employee advocacy**, where CDW sales teams actively share success stories and impact stats.
- Implemented an **ongoing content cadence** across channels, featuring updates, participant success stories, and regional economic impact highlights.

AI & Automation for Longevity:

- Developed an **AI-powered content generator** that tailors key insights to different audience segments (e.g., suppliers, clients, policymakers).
- Automated **real-time impact tracking**, ensuring that CDW can continuously showcase updated metrics and success stories.
- Built an **internal recommendation engine** that connects CDW sales teams with relevant diverse vendors based on their clients' needs.



Case Studies

EY Open Science Data Challenge

Formerly: EY Better Working World Data Challenge

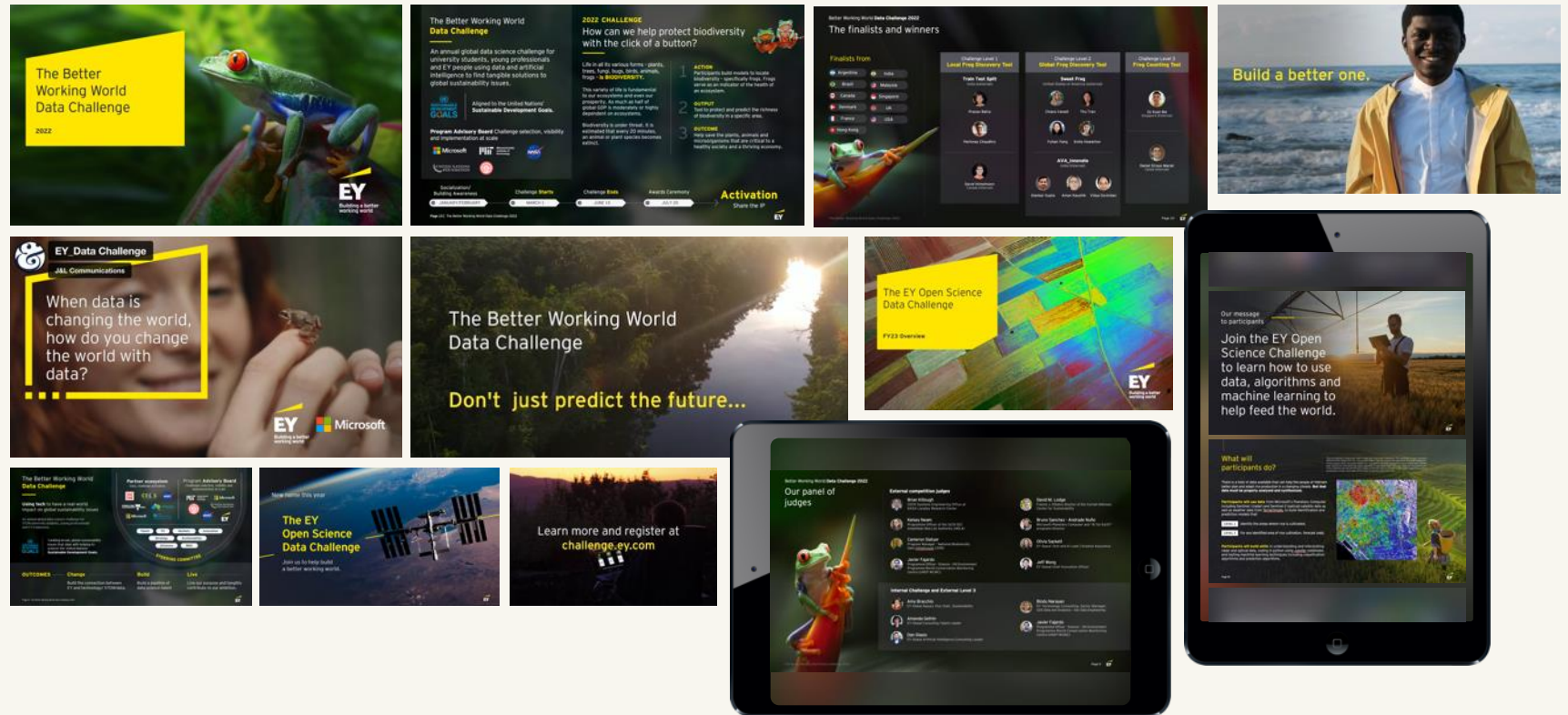


Overview:

J&L helped EY raise the profile of its Better Working World Data Challenge as a marquee program and further develop it across service lines. We evolved the perception of EY's brand and help close tech brand gaps, as many people view EY as an accountancy firm, and not at the forefront of innovation and technology.

J&L provided overall campaign strategy and channel management along with strategic and creative support to develop program assets that drive awareness of and participation in the program. This included static and interactive/animated illustrations that could be utilized across channels, high-level video and animation highlighting the loss of biodiversity and this particular challenge.

We also helped teams develop practical, usable solutions; content development including internal and external articles and communications, social media amplification with animated ads.



Case Studies

EY Global Government & Infrastructure campaign activation

Overview:

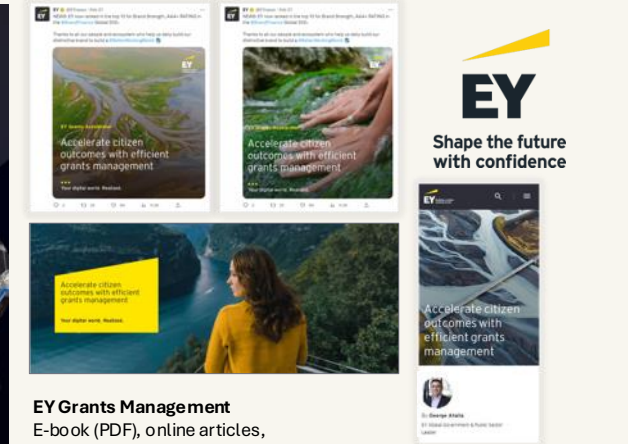
EY's Global Government and Infrastructure Group has developed a comprehensive three-year strategic marketing plan in support of EY's plan to aggressively grow the Global G&I business and become the number one trusted advisor in the government consultancy market.

J&L is working in close partnership with the BMC team to support 3 marquee programs for campaign activation around Sustainability, Digital State and PFM Blockchain.

Working with EY's analysts and data from market-leading research and education institutions we developed content, creative and media strategies for a full suite of internal and external campaign assets.



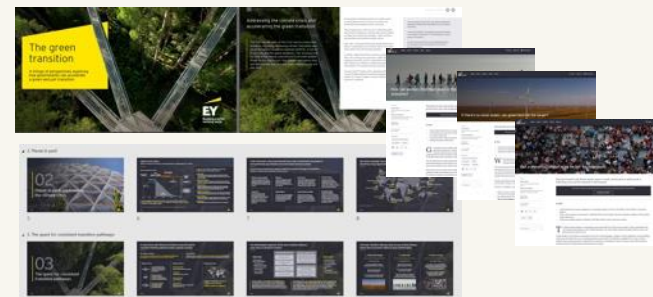
Infographic showing impact across all EY G&I programs



EY Grants Management E-book (PDF), online articles, social media and PowerPoint support for podcast series, and marketing activation pack.

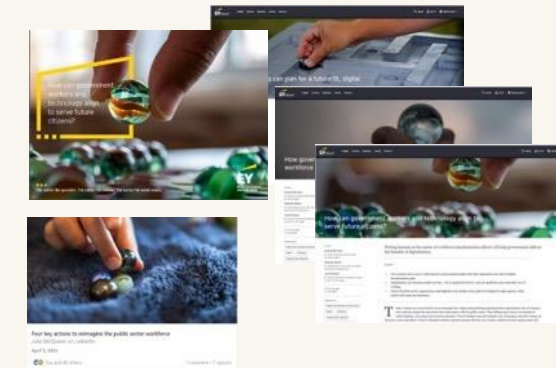
EY Green Transition campaign

Global adverts, Main report (PDF) and **online articles**



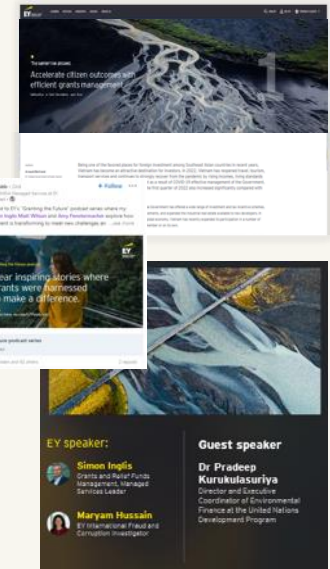
EY Digital State campaign

Global adverts (PDF) and **online articles**



Digital Public Goods campaign

E-book report (interactive PDF), **online articles**, animated social media assets, client deck and talk track, and marketing activation pack.



Case Studies

Building Visibility and Authority for EY Consulting Leaders (1/2)

Overview:

EY US Consulting advises organizations navigating AI adoption, operational reinvention, and large-scale transformation. Its leaders shape conversations that matter to CEOs, boards, and transformation sponsors — not simply reacting to change, but helping define it.

For more than five years, J&L has partnered with EY US Consulting to strengthen the voice, clarity, and market presence of its senior leaders. We are a strategic extension of their marketing, communications and social media teams; translating business priorities into distinctive executive narratives that influence the market.

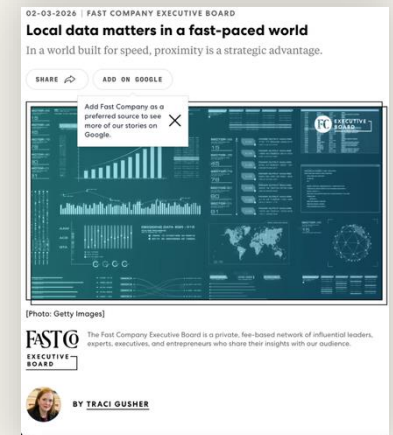
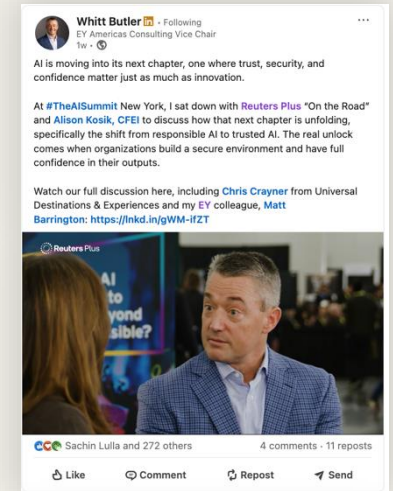
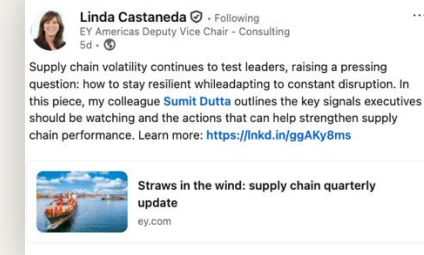
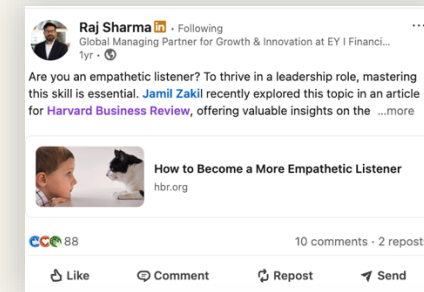
We help Consulting leaders articulate what they uniquely believe and ensure that belief shows up consistently, credibly, and at the right moments.

Business Challenge

As AI, risk, and operating model transformation accelerate, EY’s consulting leaders are expected to publish thoughtful, differentiated perspectives — at speed. The challenge was not simply cadence. It was distinction.

- Some leaders were publishing inconsistently.
- Others had strong expertise but lacked clearly defined narrative themes.
- High-visibility opportunities (Fast Company, awards, major campaigns) required sharper positioning and stronger storytelling.

EY required a partner who deeply understood its consulting business, could anticipate market signals, and help leaders refine and express their point of view with clarity and authority.



Case Studies

Building Visibility and Authority for EY Consulting Leaders (2/2)

Our Approach

Working closely with each leader, we identify their distinct themes within the broader EY narrative:

- Agentic and AI-enabled operating models
- Transformation outcomes and value realization
- Governance and risk
- The changing role of consulting

We then translate those themes into structured content pillars and individualized tone-of-voice profiles. Ensuring that every post, article, or caption reflects the leader’s authentic style, aligns to EY’s strategic priorities, and builds cumulative authority over time—a recognizable, credible voice.

High-Impact Editorial Partnerships

For external platforms such as Fast Company, we act as thought partners; shaping argument, refining narrative arcs, and elevating practical insight. We amplify the points of view on social getting almost 100 reactions per post, demonstrating strong shareability and peer amplification. Performance that reflects not only distribution, but resonance.

Building Sustained Executive Visibility

Across more than a dozen senior leaders, we established structured content pipelines tied to market moments, client priorities, and campaign launches. For 12+ senior leaders, we increased LinkedIn followers by 20%+ year over year. We continue to see steady growth in engagement and peer amplification and stronger visibility among senior decision-makers

Strategic Recognition and Market Validation

We develop award submissions and external recognition narratives that reflect measurable business impact — not generic accolades. Support has included:

- Consulting Magazine Rising Stars
- Top Consultants recognitions
- AI leadership awards
- SXSW
- Cannes Lions proposals

Agile Narrative Execution

While strategy leads, responsiveness matters. Many of the senior leaders we support are showing up at events, as spokespeople for campaigns, in press moments, and leadership announcements-and it’s our job to deliver commentary to these moments and often at speed without sacrificing quality, voice, or alignment. Through this five-year partnership, we have helped EY US Consulting strengthen its executive presence and influence in a rapidly evolving advisory market.

Leader	Title	Company	Industry	Followers	Engagement	Content	Notes
Jason Noel	CTO	EY	Technology	965	1.5	US (Boston)	• Public website • Professional URL • No background image • Missing bio • Missing "About" section • Incomplete About Section: Not in complete form • Incomplete content published
Bill Briggs	CTO	Databricks	Technology	8,000	6.0	US (Boston)	• Company profile • Professional URL • Complete bio • Professional URL • Professional URL • Professional URL • Professional URL • Professional URL
Matt Bishop	CTO	SAP	Technology	1,000	1.0	US (Boston)	• Has not published any content • Does not have a background image
Karthik Narain	Chief Data Officer	Databricks	Technology	64,472	6.0	US (Boston)	• Company profile • Professional URL • Complete bio • Professional URL • Professional URL • Professional URL
Jacky Wright	CTO	Microsoft	Technology	26,373	4.0	US (New York)	• Company profile • Professional URL • Complete bio • Professional URL • Professional URL • Professional URL
Russell Preston	Global Director	Y&R	Technology	900	0.5	US (Boston)	• Public website • Professional URL • Does not publish content very often • Does not have a background image

Traci Gusher · Following
Partner, EY Americas AI and Data Leader

The capabilities brought together here between SAP and Databricks are a tremendous opportunity for companies to do more with their data across these technologies. Together with EY, we collectively will help organizations drive increased value from their Data and AI programs.

Hugh Burgin · 2nd
Partner/Principal - Data & AI Consulting at EY
1mo · Edited ·

EY is proud to be a launch partner of the new BDC Connector between SAP Business Data Cloud and Databricks. ...more

EY Shape the future with confidence

databricks

SAP Business Data Cloud

A proud launch partner of the BDC Connector between SAP® Business Data Cloud and Databricks

75 likes · 6 reposts



LinkedIn Audit

Jason P. Noel

Profile Recommendations

- Ensure that bio is up-to-date as all as the bio is important. See here for inspiration: [http://lnkd.in/g/4k4k4k4k](#)
- Update your "About" section to reflect your professional story, key skills, and areas of expertise. Make sure to incorporate relevant keywords to strengthen your LinkedIn image. See here for inspiration: [http://lnkd.in/g/4k4k4k4k](#)
- Update your "Experience" section to include roles & responsibilities for your current position at EY. Be sure to mention any relevant keywords in your profile. See here for inspiration: [http://lnkd.in/g/4k4k4k4k](#)
- Add an EY-branded LinkedIn background image to your profile to reinforce your connection to the company, build credibility with your network, and more. See here for inspiration: [http://lnkd.in/g/4k4k4k4k](#)
- Update "Primary Button" on profile from "Connect" to "Follow". See here for inspiration: [http://lnkd.in/g/4k4k4k4k](#)

Content & Engagement Recommendations

- Use the higher posting frequency, so you can reach more engagement rates. Regularly sharing content keeps your profile active and increases opportunities for interactions, helping to establish your presence as a thought leader in your field.
- Engage with relevant content. Includes those chosen that users who engage with with their network or a 20% increase in profile views.
- Experiment with different types of content to see what resonates most with your audience. This can include EY thought articles, posts from the EY account, relevant news articles to your niche, product showcases about your career or industry, etc.

Followers: 965
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Articles Published: 0
Last Post: April 2025

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EY Americas Deputy Vice Chair - Consulting

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Strategic supply chain management: bridging the C-suite gap
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Global Artificial Intelligence Leader at EY Consulting

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#ShapeTheFutureWithConfidence

Case Studies

Merck: Design & Impactful Storytelling through Economic Inclusion and Business Diversity Annual Report



Overview:

Merck sought to elevate the visibility of its Economic Inclusion and Business Diversity (EIBD) program, ensuring that its \$4.4 billion commitment to diverse businesses was more than just numbers—it needed to be a compelling, data-driven narrative that resonated with internal teams, external stakeholders, and the broader business community.

Business challenge:

Merck needed a strategic research analyst and creative partner who could translate raw procurement data into engaging annual reports, social media assets, web content, and SharePoint materials to drive total amplification.

Solution

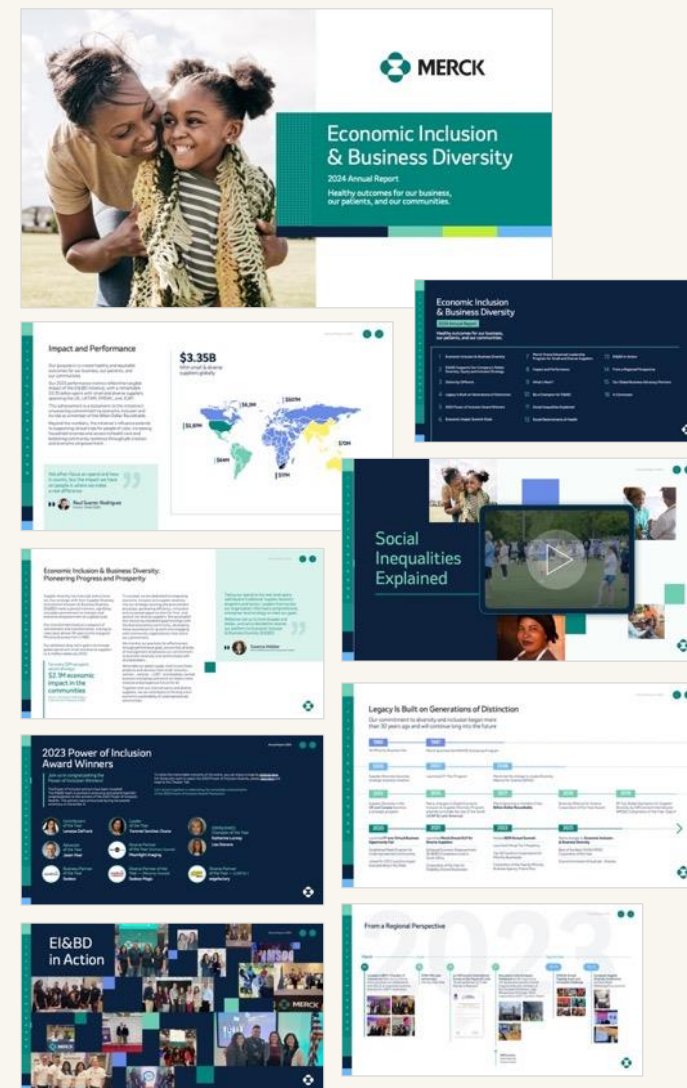
Multifaceted communications strategy - turning complex supplier diversity data into high-impact storytelling across multiple platforms:

- **EIBD Annual Report** – Designed a visually compelling report with **state and regional heatmaps**, success stories, and data visualizations to illustrate real-world impact.
- **Social Media & Digital Content** – Developed **social media toolkits, leader thought leadership posts, and internal social content** (Sync Social & Engage Viva) to amplify EIBD’s reach.
- **Website & SharePoint Redesign** – Restructured Merck’s **internal SharePoint site**, making supplier diversity content, case studies, training materials, and business intelligence insights more accessible.
- **Presentation & Event Support** – Created **branded, high-impact presentations** for leadership briefings, industry events, and supplier mentorship programs.
- **Battle Cards & Council Activation** – Developed quick-reference **battle cards** and strategic content for major diversity events (WBENC, NMSDC, DiversityIN), ensuring clear, consistent messaging.

Results

- **Data Turned into Action** – Merck’s EIBD team gained the tools to effectively communicate its impact, increasing visibility across internal and external channels.
- **Stronger Digital Presence** – Thought leadership and social content drove greater engagement, positioning Merck as a leader in supplier diversity.
- **Streamlined Internal Communications** – A redesigned SharePoint hub ensured employees could easily access critical program information, enhancing internal alignment.

By combining **design, creative storytelling, and strategic content development**, J&L helped Merck transform **raw data into an engaging, high-impact narrative**—bringing its commitment to economic inclusion to life across platforms.



Case Studies

Cherry Bekaert Rebrand Journey

Overview:

Cherry Bekaert, a nationally recognized CPA firm with a focus on growth engaged J&L to work with the CMO to develop marketing's 5 strategic priorities. J&L lead the creative work for the key pillar 'Creating a Distinctive and Trusted Brand', engaged to support and lead the in-house design team to review and refresh the overarching brand, logo, look and feel, and develop key collateral and templates across all mediums.

Business challenge:

After years of organic and acquisitive growth, the brand was disparate and in need of an overhaul to align the teams across both service lines and national territories.

Cherry Bekaert required a focused brand identity, well-trained and educated brand ambassadors and clarity to deliver a consistent client experience wherever they may be.

Solution

Refreshed Brand Identity delivering key **overarching branding tenets and guidelines**:

- **Vision & Mission**
- **Logo & Design**
- **Events** and more
- **Templates** for PowerPoint and Word, used firmwide by nearly 2,000 staff
- **Digital assets** - new website devices to carry the brand and **video templates** for corporate and social media videos.

Brand Guidelines:

- **New color palette**
- **Revised logos and usage** (including how to use with partners and future acquisitions)
- **Fonts**
- **Stock library development**
- **Iconography**

Results

- **New brand with core assets** applied to new materials
- **Internal communications program** educated and enthused all staff
- **Reinvigorated brand**, marketing and design teams at the center
- Part of **core initiatives** that subsequently **attracted investment from private equity**

The TAG by Cherry Bekaert rebrand not only preserved TAG's legacy but successfully integrated it into the larger refreshed Cherry Bekaert brand. The evolution of the brand, competitive differentiation, practical application, and strategic communications rollout collectively reinforced the firm's position as a growth-oriented CPA powerhouse, poised for continued success and expansion.

The rebrand journey exemplifies a commitment to excellence and strategic alignment within the dynamic landscape of financial advisory services.



Case Study

Modernization in Motion: Turning CFO Insights into Strategic Advantage

Business Challenge

Cherry Bekaert wanted to deepen engagement with CFOs at U.S. middle-market companies (revenues \$5M–\$250M) by showcasing a nuanced understanding of their modernization journeys. Despite growing demand for digital transformation, many CFOs were struggling to balance technology adoption with talent, data, and process constraints. The firm sought a way to:

- Validate client challenges and priorities with original data.
- Arm partners with fresh, relevant insights to drive richer conversations with CFOs.
- Generate owned content that could live across multiple channels including social, PR, digital, and events.
- Position Cherry Bekaert as a trusted advisor to middle-market finance leaders navigating transformation.

Our Approach

J&L partnered with Potloc, a specialized research agency known for delivering high-quality executive data at speed, to develop and execute "Modernization in Motion: Insights from Middle-Market CFOs", an original research program designed to capture how CFOs are modernizing their finance functions.

Solution

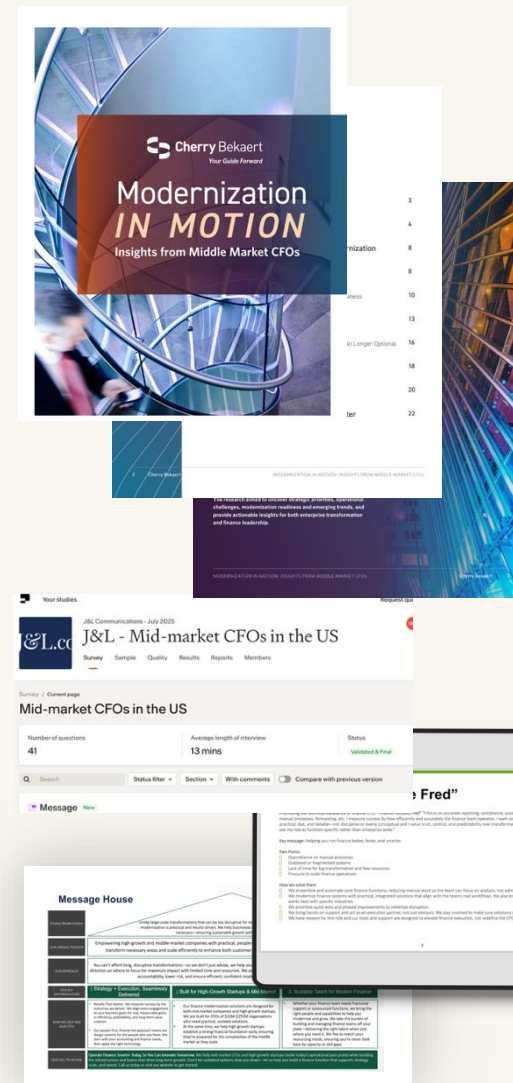
Research, content & campaign strategy - From questionnaire development and insight analysis, to report design and final campaign rollout.

- **Survey Strategy** - 30-question survey targeting 200+ CFOs and senior finance leaders across manufacturing, technology, healthcare, real estate, and professional services.
- **Survey Analysis**— Synthesized key findings into five actionable insights that served as the report’s editorial backbone and scaffolding for the creative assets.
- **Report Design & Production** - A 24-page report and flagship thought leadership piece that combined data visualization, quotes from CFO leaders, and practical commentary to reinforce advisory expertise; blending proprietary data with storytelling and design.
- **Content Ecosystem & Longevity Plan** - A full activation toolkit sequenced into a “drip” strategy that maintained momentum, supported lead generation, and extended campaign lifetime; including:
 - **PR assets:** Press release, pitch brief, and executive talking points.
 - **Social media content:** Carousels, infographics, quote cards, and short-form videos.
 - **Thought leadership articles:** Drafts for Cherry Bekaert’s website and LinkedIn.
 - **Internal communications:** Leadership messaging and social copy for key partners.
 - **Sales enablement materials:** Client and prospect decks.
 - **Paid media assets:** Display ads and LinkedIn campaign templates.

Results

A robust **survey** and fully **branded report** that translated complex data into clear, actionable insights; elevating Cherry Bekaert’s presence as thought-leader on finance modernization. Commercial outcomes included:

- Over **30 client wins** within first campaign cycle
- **Built pipeline** of ongoing opportunities
- Achieved **18.8% conversion rate** (2–3x industry benchmarks)
- **Ranked in Top 3** for “Financial Modernization” vs **Big 4 competitors**
- Drove **1.28M reach and 71% engagement** via advocacy
- Delivered **50% content engagement rate**, outperforming site averages



Case Studies

Quantis: An Environmental Sustainability Consultancy's Brand Refresh

Overview:

Quantis, a pioneering environmental sustainability consultancy that is part of BCG, embarked on a transformative journey to refresh its brand and visual identity, aligning with its new strategic direction from "accountants of sustainability" to a strategic partner to clients.

Business challenge:

To position Quantis as a leader in sustainability, providing not only science and data but also strategic consulting expertise.

Solution

Refined brand and messaging approach, designed to work across media and across all platforms:

- **Developed messaging** for diverse audiences and industries, including a hiring increase and surge in new talent.
- **Aligned communications with key milestones**, including new leadership, vision, manifesto, and organizational changes.
- Crafted communications for **high-profile campaigns** like Generation Glasgow and SPICE.
- Refined the **VI to align** with the new messaging.
- Produced **videos to introduce the new brand** from the CEO, and feature internal testimonials, and "Why Quantis?" narratives.

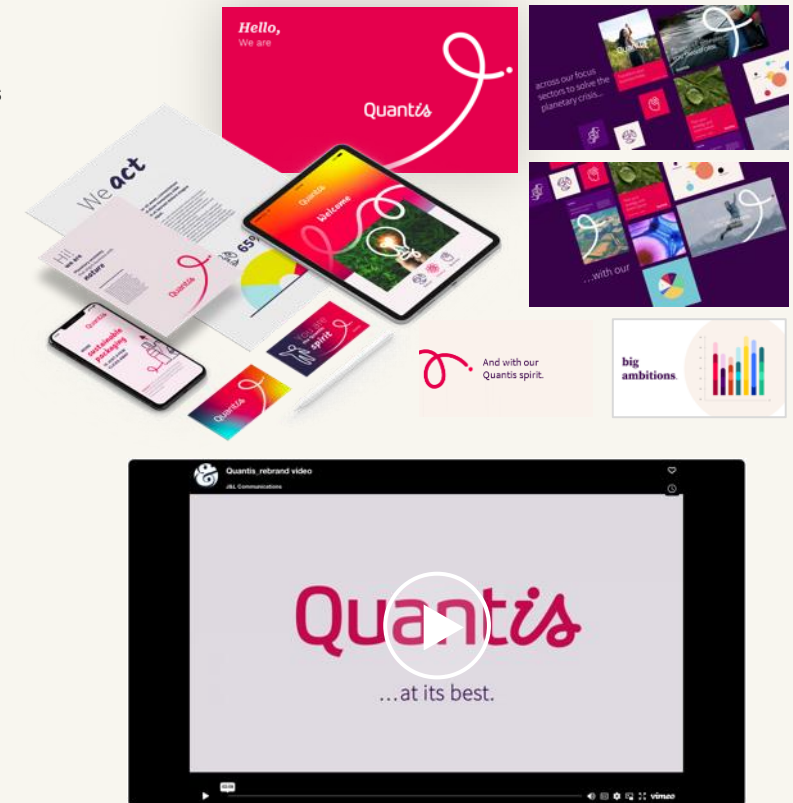
Taking this rebrand to social we:

- Conducted **LinkedIn trainings for the leadership team**.
- Developed **monthly blog posts for the CEO** and key leaders.
- Crafted **social media content** based on messaging across platforms.

Results

- The brand evolution successfully communicated Quantis' commitment to sustainability and strategic consultancy.
- The refreshed brand assets and narrative captured enthusiasm among stakeholders, reinforcing Quantis' position as a dynamic leader, ultimately supporting their acquisition by BCG.
- The flexible visual elements allowed for dynamic storytelling, aligning seamlessly with the organization's renewed purpose and positioning in the sustainability landscape.

Quantis



Case Studies

Unifying a New Brand: Transforming Complexity into Clarity

Overview:

Tegria, a dynamic healthcare technology services company, faced a significant challenge after acquiring over a dozen businesses. The diverse array of acquired entities brought unique strengths but also posed integration complexities. Tegria sought to develop a unified brand identity to streamline operations and enhance market presence.

Tegria enlisted the expertise of J&L Communications to navigate the complexities of brand integration. We devised a multifaceted strategy to unify Tegria's diverse portfolio while preserving the unique value propositions of each acquired entity.

Business Challenge:

Tegria acquired a variety of businesses with distinct specialties and operational frameworks, leading to fragmentation. There was a lack of unified brand identity hindering Tegria's ability to communicate its comprehensive service offerings effectively.

Solution

A cohesive **brand identity** that reflected Tegria's overarching mission and values while accommodating the diverse specialties of its subsidiaries.

- **Comprehensive market research** - conducted to understand industry trends and customer preferences.
- **Brand vision** – research-based vision that aligned with its strategic objectives.
- **Communication plan** - Developed to effectively convey the brand's unified message internally and externally.
- **Targeted communication** - Implemented initiatives to engage stakeholders at all levels and foster buy-in for the integration process.
- **Amplify brand narrative and enhanced visibility** - Leveraged various channels, including digital platforms and traditional media

Results

Through our strategic collaboration, Tegria successfully navigated the complexities of brand integration and emerged as a unified entity with a strong market presence within the healthcare technology landscape. The key outcomes of this transformation include:

- **Enhanced Brand Cohesion:** Tegria's subsidiaries now operate under a single cohesive brand identity, enabling consistent messaging and positioning in the market.
- **Strengthened Market Position:** Tegria's enhanced brand visibility and comprehensive service offerings have reinforced its position as a leading healthcare technology services provider.
- **Increased Stakeholder Engagement:** Effective communication initiatives have fostered greater stakeholder engagement and alignment with Tegria's strategic vision.



Case Studies

Advent Health

Overview:

Each year, AdventHealth honors physicians and Advanced Practice Providers (APPs) who demonstrate exceptional dedication and uncommon compassion for patients and colleagues. While traditionally structured as a standard awards program, AdventHealth sought to evolve the experience—transforming it from a sequence of recognitions into a compelling story about the organization’s leaders, culture, and mission.

AdventHealth sought a creative partner who could blend narrative development, scriptwriting, visual identity into a completely reimagined program. One that felt less like an awards ceremony and more like a narrated event that honored the heart of the healing profession.

Business Challenge:

AdventHealth wanted the event to transcend the typical awards format. Instead of simply listing honorees and categories, they envisioned a deeply emotional, cohesive storytelling experience. One that:

- Highlighted not only award recipients, but the culture and leadership that define AdventHealth.
- Elevated production quality to reflect the prestige of the awards.
- Balanced data, storytelling, and human moments with the reverence these honorees deserve.
- Created a signature event experience befitting an institution committed to whole-person care.

Solution

Partnering with EdgeFactory, J&L designed a narrative-driven creative experience bringing cohesion, emotion, and cinematic quality to every element of the event.

Narrative and Script Development

Crafted the complete event script, weaving together:

- Personal stories of honorees
- The organization’s mission, values, and vision
- Emotional through-lines that connected categories and segments
- Messaging that honored the extraordinary resilience of caregivers

Creative Direction & Visual Identity

A bold, refined, Art Deco–inspired design system, evoking the elegance and drama of a high-profile awards show. Elements included:

- A cohesive visual theme reminiscent of the Academy Awards
- Animated graphics, transitions and compelling video with key soundbites
- A polished award-show palette and typographic system
- Visual cues that added gravitas to honoree recognitions

Show Flow & Production Support

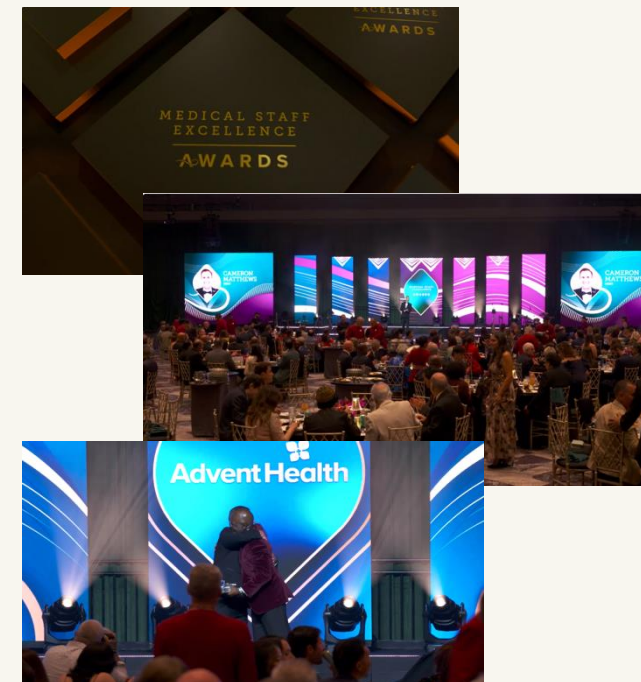
- Scripted flow enhanced with smooth pacing and transitions
- Video timing, musical cues, and emotional stage moments aligned with narrative arc
- Integration of pre-produced honoree videos, live remarks, and scripted storytelling

Results

The transformed event became AdventHealth’s most emotionally resonant and visually polished programs to date, one that unfolded like a story—not a sequence of awards.

- Reframed the awards as a powerful storytelling experience.
- Highlighted the organization’s culture and values, deepening the audience connection
- Honored physicians and APPs through a narrative that captured their true impact.
- Elevated the event’s visual and emotional impact to match the extraordinary contributions of the honorees.

The success of this event established a new creative benchmark for AdventHealth’s recognition programs and one that reflects the excellence of their caregivers and the heart of their mission.



Case Studies

Smarter Together: Building Choreo's CPA Alliance for Growth

Overview:

Choreo wanted to reposition its CPA Alliance as more than a referral program -transforming it into a true partnership platform for CPAs who serve high-net-worth clients.

Business Challenge:

The program's existing offer felt informal and unclear, with a passive value proposition and limited conversion traction—resulting in weak conversions and limited engagement. Messaging didn't address core CPA pain points around client retention, growth, or the risks of navigating complex wealth cases alone.

Solution:

J&L rebuilt the CPA Alliance from the ground up — redefining the strategic narrative, simplifying the value proposition, and creating a full go-to-market campaign centered on partnership, trust, and shared client outcomes.

Clear Positioning & Messaging

We introduced a focused narrative:
 “Your Clients. Our Team. Shared Success.”

The value proposition was distilled into four CPA-aligned benefit pillars:

1. Dedicated Advisor Support for complex client scenarios.
2. Co-Branded Marketing Kits to drive growth.
3. Education & Community through CPE, insights, and networking.
4. Compensation was reframed as relationship-building, emphasizing collaboration over competition.

Creative Campaign

Multiple creative routes were developed and tested, including:

- “Never alone with a \$5M+ client question.”
- “Tired of turning down wealth conversations?”
- “Be the one clients turn to in life's biggest moments.”
- Each concept extended into LinkedIn ads, Google Display, and dedicated landing pages.

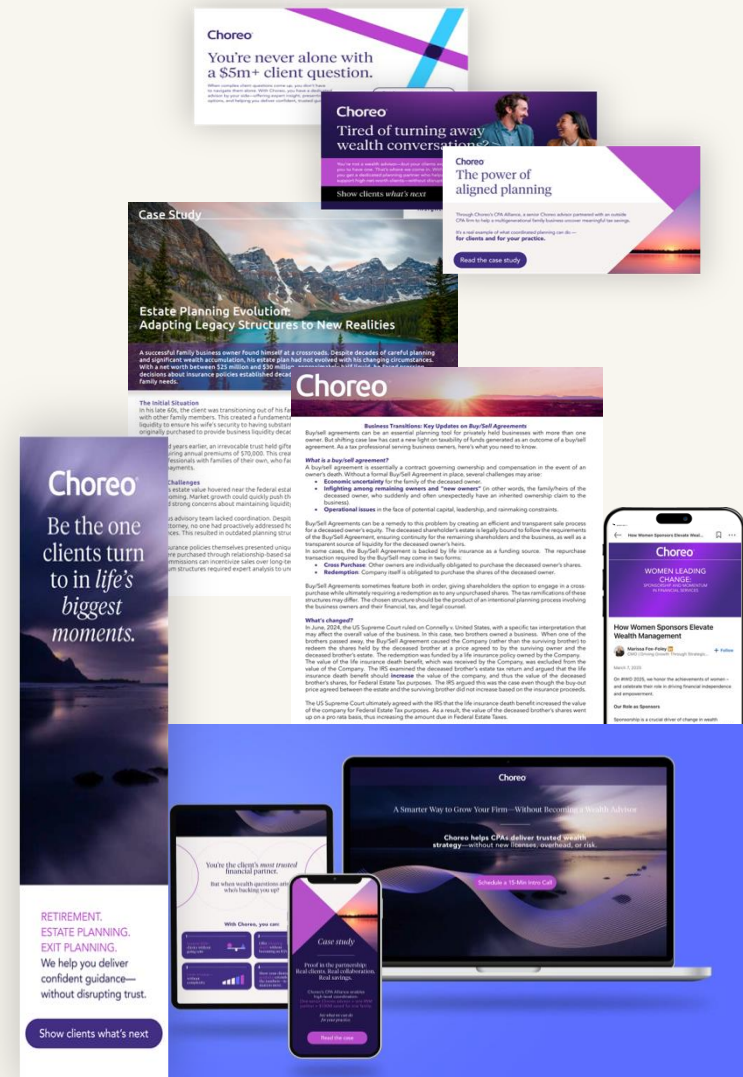
Full Campaign Ecosystem

A coordinated content engine drove CPA acquisition and retention:

- Digital ads and conversion-optimized landing pages.
- Drip email nurture with FAQs, case studies, and success stories.
- Onboarding kits, partner portals, and loyalty programs.
- A flagship case study — a Choreo-CPA collaboration yielding \$100M in estate tax savings — demonstrated real-world impact.

Impact

- Repositioned the Alliance into a structured, relationship-driven partnership platform.
- Increased CPA acquisition through clearer messaging and higher-performing landing pages.
- Created a scalable framework for ongoing partner activation and loyalty.
- Established IP for a future annual benchmark: State of CPA Alliances.



Case Studies

Digital Transformation Survey Marketing

Overview:

To solidify its position as the leading authority on digitally enabled healthcare transformation, Chartis used its annual Digital Transformation Survey to show both the realities of today’s digital landscape and the path forward for health systems. The survey’s insights demonstrate Chartis’ unmatched domain expertise while driving visibility, credibility, and meaningful differentiation in a crowded market. Serving as both a reputation engine and a catalyst for engagement, the findings reinforce Chartis as the trusted advisor helping organizations navigate complex digital change.

Business challenge:

Chartis sought to amplify the impact of its Digital Transformation Survey by creating a compelling marketing campaign that would:

- Showcase survey insights.
- Engage healthcare leaders through thought leadership.
- Drive visibility across digital channels.

Chartis needed a partner to:

- Translate complex survey data into clear, actionable messaging.
- Develop creative assets aligned with the brand narrative “Connecting the Dots.”
- Deliver a suite of marketing materials under tight timelines.

Solution

J&L Communications partnered with Chartis to design and execute a comprehensive marketing strategy. Key steps included:

Messaging Workshop:

- Conducted a collaborative session with Chartis stakeholders to define the narrative and messaging framework.
- Established the overarching creative theme: Dot Connectors.

Creative Development

- Crafted foundational assets leveraging the agreed messaging and creative strategy.
- Developed a **Visualization Toolkit** concept for reusable infographic and motion assets, later streamlined for efficiency.
- **Client Deck:** Messaging and design for internal and external presentations.
- **Social Media Toolkit:** LinkedIn posts for Chartis leaders (20+ posts across phases).
- **Paid Media Assets:** LinkedIn ads, display ads, and additional social content (carousels, GIFs, imagery).
- **Provocation Cards:** Conceptual framework integrated into the messaging suite for longevity.

Results

- Elevated Chartis’ thought leadership in digital transformation.
- Provided a cohesive suite of assets for multi-channel engagement.
- Enabled Chartis to reuse and adapt creative elements for ongoing initiatives.
- 5,300+ article views
- 11+ media hits
- 120K+ combined advertising impressions



The collage features several key pieces of content:

- Top Left:** An infographic titled "Flipping the model: From reactive to proactive healthcare" showing a bar chart where 85% of respondents agree that "your health system planning to provide timely, convenient access to care in the next 5 years" is essential.
- Top Right:** A section titled "The urgency to transform" with a "9 out of 10" graphic. It states that 61% of respondents agree that "today's approach to healthcare delivery is falling in dramatically, even in the best cases" and 52% agree that "current operating models are under pressure—and viability depends on evolution." It also notes that 49% of respondents believe "if your operating model isn't better in 7 years, what are you doing wrong in the long run?"
- Middle Left:** A social media-style post with a "9 out of 10" graphic and text: "Health system executives agree that 1 system must fundamentally change operations to thrive in the next 5 years." It lists differentiating attributes like "Digital first experience" and "Patient centered, data-driven insights".
- Middle Right:** A "Provocation Card" titled "Turning activity into outcomes" with a "9 in 10" graphic. It states: "Health systems have made big digital investments—but the differentiator will be turning that activity into outcomes." It includes a "Care at home" stat: "2/3 of respondents say their health systems are providing care at home or in patients' homes."
- Bottom Left:** A social media-style post with a "9 in 10" graphic and text: "Health system executives agree that 9 out of 10 health systems must fundamentally change operations to thrive in the next 5 years." It includes a "Care at home" stat: "2/3 of respondents say their health systems are providing care at home or in patients' homes."
- Bottom Right:** A social media-style post with a "9 in 10" graphic and text: "Health system executives agree that 9 out of 10 health systems must fundamentally change operations to thrive in the next 5 years." It includes a "Care at home" stat: "2/3 of respondents say their health systems are providing care at home or in patients' homes."

Case Studies

American Equity: A Full-Spectrum Marketing Partnership

Overview:

American Equity Investment Life (AEL) is one of the nation’s leading fixed indexed annuity providers, delivering guaranteed income solutions through a national network of independent financial professionals. To compete in a fast-evolving market and respond to landmark regulatory change, AEL partnered with J&L as their embedded strategic marketing team.

Business Challenge:

AEL faced a convergence of pressure points: a fragmented content and thought leadership strategy, an aging advisor loyalty program, limited social media presence, and the 2023 DOL’s landmark Fiduciary Rule requiring audience-specific communications at every level—from C-suite to front-line agents—all while competing for advisor mindshare against well-resourced national carriers.

Solution:

Content & Thought Leadership: Developed a competitive audit to understand where the white space was, then developed a content roadmap anchored in the the overall campaign theme: “Longevity isn’t a risk, it’s a goal.”

Social & Digital Strategy: Developed full social foundations for American Equity and Eagle Life (LinkedIn, Facebook, X) with content pillars, paid media frameworks, and senior leadership LinkedIn audits.

Loyalty Program Rebrand: Advisor loyalty reimagined from two tiers to six (Premier through Diamond Hall of Fame) with new visual identity, value propositions, and email drip campaigns.

DOL Fiduciary Rule Communications: Complete regulatory response: executive decks, advisor presentations, IMO/agent talking points, internal newsletters, and CEO client letters.

Campaign Development & PR: Developed PR and marketing campaigns around key themes and product launches including: “Cost of Waiting,” BalanceShield launch, and a 6-segment Producer Awareness Campaign. Media trained SMEs and secured bylines.

Results:

- **Loyalty program modernized:** Two tiers reimagined as a six-tier architecture (Premier through Diamond Hall of Fame), spanning \$1M–\$300M+ in AUM
- **Social platforms activated:** Three platforms launched for two brands with \$5K+/month paid media framework and exec LinkedIn audits
- **Regulatory communications delivered:** Six audience types reached with DOL Fiduciary Rule materials
- **Producer Awareness Campaign:** Six advisor segments reached with strong engagement across the board
- **Earned media secured:** ThinkAdvisor bylines and industry trade media placements delivered credibility at scale
- **Brand equity built:** AE Women’s Council identity created; enterprise brand guidelines refreshed



Strategic approach
Create content designed to increase awareness, engagement, and loyalty with wholesalers

Thought leadership can enhance our product marketing efforts and significantly influence decision makers because it can:

- Differentiate us in the market by positioning ourselves as a trusted go-to resource that delivers informative content – insights on industry needs, challenges, trends
- Attract a wider audience through shareable content and a consistent presence
- Increase opportunities to engage with customers, building loyalty and retention
- Influence purchasing decisions through the trust and credibility established by delivering

64% of buyers say that an organization’s thought leadership content is a more trustworthy basis for assessing its capabilities and competency than its product marketing materials

New Branding

OLD vs **PROPOSED**

SKYROCKET YOUR EARNINGS

LOYALTY REWARDS PROGRAM

In our strategic effort to enhance the appeal and effectiveness of The American Equity loyalty program, we have crafted a new branding approach with more sophistication and modernity.

Departing from the past, where our messaging focused on just two groups, Premier and Elite, we are now introducing tier names and designs at each production level. This shift is driven by a nuanced understanding that while payouts may have remained consistent across levels in the past, we want to articulate the distinct value proposition associated with each tier. By showcasing the benefits that accumulate as agents progress, we aim to clearly explain the competing incentives for advancement. The redesigned program not only modernizes your brand image but also communicates a more sophisticated ethos, catering to both the retention of high-producing agents and the enticement of prospective participants. The versatile design ensures seamless integration across multiple channels, be it in the office, email communications, or the portal login page, thereby maximizing accessibility and impact. This strategic rebranding positions elevated the experience for your agents at every production level.

2024 Loyalty Tiers

DIAMOND HALL OF FAME
paid incentives under consideration

PLATINUM ELITE \$10M+ | 150 bps

GOLD ELITE \$7-9.99M | 125 bps

SILVER ELITE \$5-6.99M | 100 bps

PREMIER+ \$2-4.99M | 50 bps

PREMIER \$1-1.99M | 25 bps

PRODUCERS <\$1M | No Loyalty payout

Case Studies

Equitable: Integrated Communications Strategic Partner

Overview:

Equitable (formerly AXA Equitable Life), a leading financial services company since 1859 serving 2.8 million clients, engaged J&L as an embedded multi-workstream strategy and communications partner. J&L supported the Wealth Advisory Business, Protection Solutions, and Employee Benefits teams—setting the strategy for business lines, identifying and training the bench of advisors to speak to the media on behalf of the brand, developing thought leadership, managing media relations, producing internal systems and content, and supporting with crisis communications

Business Challenge:

Equitable operated a cross siloed business lines (Wealth, Protection, Employee Benefits, and Internal Comms) each with distinct audiences and channels. The company needed to establish advisor thought leadership, build a content engine, modernize internal communications, navigate COVID-19 communications with clients, and launch high-profile media partnerships simultaneously and at scale.

Additional work included a wealth gap series featuring diverse Equitable advisors and securing a Kiplinger’s column for advisor Stephen Dunbar.

Solution:

Thought Leadership & External PR: Developing the media strategy and key messaging, media training, and overall management of the communications, messaging and thought leadership for the Wealth, Protection Solutions and Employee Benefits businesses

Developed the first bench of wealth advisors to serve as brand ambassadors in the market: Identifying advisors with specific expertise across various topics like: families with special needs, LGBTQ+ families, gray divorce, women, Black and Hispanic/Latino.

Retirement Readiness Content Engine: 26 SEO-optimized articles + social copy, 13 branded 60–90s videos, and 13 infographics plus pandemic-specific content on job loss, gray divorce, and single breadwinners.

Internal Communications: Co-led Equitable Weekly all-company newsletter, Advisor Spotlight series, Adaptive Leadership bi-weekly video series, intranet templates, and visual design support.

The Atlantic Partnership: Full content production for Equitable’s editorial program with The Atlantic—digizine “When Tomorrow Becomes Today,” print spread, sponsored social, native units, and 100% SOV newsletter targeting affluent Gen X/Boomers 45+.

Columbia University PR: Launched the Equitable Columbia Holistic Financial Coach Credential, media relations, press release, and advisor communications for a program that enrolled 1,500+ financial professionals.

Results:

- **Content engine at scale:** 26 articles + 13 videos + 13 infographics produced for Retirement Readiness hub
- **The Atlantic partnership delivered:** Digizine “When Tomorrow Becomes Today” across print, digital, social, and email at scale
- **Columbia program launched:** 1,500+ advisors enrolled; 100+ earned Holistic Financial Coach Credential by year-end
- **Earned media secured:** Secured ongoing columns in Forbes and Kiplinger’s, hundreds of articles in consumer and trade outlets.



EQUITABLE

The Atlantic Program Overview

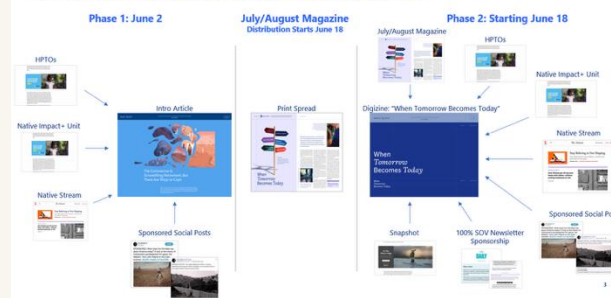
Objective: Develop a robust and actionable content program focused on *holistic retirement readiness*

Target Audience: Affluent Gen X and Boomers, 45+

Atlantic Deliverables & Experience: Intro article, print spread and robust “digizine” (digital magazine)

Equitable Deliverables & Experience: Now/Next/Later prioritization to create relevant support content and drive engagement across (1) Consumers (Prospects/Clients/Educators), (2) Financial Professionals and (3) Employees

The Atlantic Program: Complete Deliverables



Equitable Experience: Building relevance and driving engagement with the digizine content (“the on ramp”)



STRATEGIC THINKING. CREATIVE EXECUTION. MEASURABLE IMPACT.

Let's build what's next— *together.*



Strategic Partnership

We align with your goals and become an extension of your team.



Measurable Results

We focus on what moves the needle—pipeline, revenue, and growth.



Senior Expertise

You get seasoned marketers who bring experience, perspective, and leadership.



Built To Adapt

We evolve with your business to meet new challenges and capture new opportunities.

Ready to accelerate your next stage of growth?

Let's start the conversation.

✉ hello@jandlcomms.com

🌐 jandlcomms.com

