



The Marketing & Communications Working Group met on February 8, 2022 at The Council's annual Legislative and Working Groups Summit in Washington, DC. Although the group has been meeting virtually for the past two years, it was a great change to connect in person again.

The first part of the session was an open forum for peer share and discussion regarding their team's successes and challenges in the past 6 months. Much of the conversation was universally shared and centered around the challenges with talent --recruiting in this new environment, attracting and defining the new skill sets needed for more omnichannel marketing needs, and building /sustaining culture in this hybrid or (still remote) workplace. Leadership has worked with Marketing and HR teams to develop initiatives that promote a diverse and inclusive work environment that fosters equity and establishes clear communication and culture across companies while recruiting and retaining internal talent. In addition to internal retention, companies have adopted new strategies to appeal to clients in a virtual world where face-to-face communication has been their greatest asset.

The attendees then broke up into two groups:

### GROUP 1

*Culture & Connections focusing on the greater emphasis for strong internal communications in a hybrid working environment. Some of the questions addressed:*

- How are you building and strengthening culture in a hybrid /acquisitive environment?
- How are you socializing corporate values to move the business forward?
- How does own "culture" in your organization and how have you been able to keep it at the forefront during these times –especially as many new employees joined an organization totally remote.
- What are the social threads guiding the organization and have you been able to strengthen it during the past two years?
- How is being communicated to attract and retain talent and clients?

### GROUP 2

*Enhancing the Customer Experience*

- In a hybrid/acquisitive environment, how are you ensuring a unified approach to serving clients? Have you needed to?
- How has the pandemic /hybrid work changed your storytelling about the business and how you serve your clients? Have you been able to channel in through digital efforts?
- In regards to marketing, what has been backburnered during COVID? How will you breathe life back into these projects – or have some become no longer relevant?
- How has marketing's role changed to support business in this new environment and changed its approach to prospecting?

### Take-Aways:

- Employers found that working remotely has caused several interpersonal struggles between management and individual staff members. Leadership has taken an innovative approach to team management by tailoring their management style to the individual employee rather than a blanket approach.

- In an effort to create a comprehensive plan for clients, companies have commissioned the marketing, sales, and services teams to work even more collaboratively to develop a cohesive experience for clients.
- Marketing has taken a streamlined approach to developing the customer experience by increasing the number of social events, email marketing campaigns, and using social media as a tool for promotion.
- Developing clear follow-up communication plans after events have helped companies create a customer cycle that has helped with client retention.

## **ESG PRESENTATION:**

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During lunch, Pam Kaupplia, Director of ESG at New Mountain Capital, a private equity firm that emphasizes investing in a sustainable and responsible way, gave a presentation on ESG, what it means for our firms and how a company's ESG metrics will be viewed by investors and clients.

Below are links to research and resources that were referenced in Kaupplia's presentation

- Larry Fink's 2022 letter to CEO's: <https://www.blackrock.com/corporate/investor-relations/larry-fink-ceo-letter>
- WEF, Measuring Stakeholder Capitalism: <https://www.weforum.org/stakeholdercapitalism>
  - WEF Universal Metrics: [https://www3.weforum.org/docs/WEF\\_IBC\\_ESG\\_Metrics\\_Discussion\\_Paper.pdf](https://www3.weforum.org/docs/WEF_IBC_ESG_Metrics_Discussion_Paper.pdf)
- SASB: <https://www.sasb.org/>
  - SASB Metrics for "Professional & Commercial Services": see attached
  - SASB Engagement Guide for Services: see below
- Public Peer ESG reports:
  - Marsh McLennan: <https://www.marshmclennan.com/content/dam/mmc-web/v2/esg/marsh-mclennan-2020-esg-report-2.pdf>
- Willis Towers Watson: <https://www.wtwco.com/en-US/About-Us/environmental-social-and-governance>
- Aon: <https://www.aon.com/getmedia/000245d1-0224-4a50-86a0-479086967bfd/2020-aon-impact-report.aspx>
- Brown & Brown: <https://investor.bbinsurance.com/static-files/f5c65a89-8bda-4465-b8f9-9715c104d749>
- AJ Gallagher: <https://www.ajg.com/us/about-us/social-impact/>

