



How LGBTQ Advocacy Impacts Marketing Strategy

::: MassMutual



OUT & EQUAL
2018 WORKPLACE SUMMIT

Welcome!

How LGBTQ Advocacy Impacts Marketing Strategy

Steve Brokaski | Marketing Consultant,
Marketing & Business Development

Catherine Cannon | Head of Personal
Markets, Marketing & Business
Development

Mark Roellig | Chief Technology &
Administrative Officer

Lisa St. Germain | IT Strategy & Planning
and Pride BRG Chair, Technology &
Administration

Jonathan Berthiaume | Brand
Development, Brand & Advertising

Goals of today's workshop

Today we want to share with you our journey of LGBTQ advocacy, how our Pride BRG has played a large part in supporting and driving that journey, and how that advocacy has impacted our Marketing Strategy.

SHARE

- Our journey of LGBTQ advocacy
- Strategies around supporting our LGBTQ focus advisors
- A few successes and challenges

LEARN

- How to leverage a strong LGBTQ BRG in your business
- How authentic LGBTQ advocacy can support your marketing strategies

DISCUSS

- What your company is doing to advocate for the LGBTQ community
- Challenges you face in advocating for and serving the LGBTQ market

THINK

- About what your LGBTQ BRG can do to further support your business
- About how your company's LGBTQ advocacy can influence your marketing strategies

Overview of today's agenda

- Our Purpose and Vision
- MassMutual's Journey of LGBTQ Advocacy
- Linking the Mission of the Pride BRG to the business
- How LGBTQ advocacy has impacted our marketing strategy
 - Market Research and Insights
 - LGBTQ Advertising and Marketing
 - Field Advisor Support
 - Community Outreach and Support
- Final Thoughts and Questions
- Survey

Our Purpose and Vision

“We recognize that diversity and inclusion is a catalyst that fuels our growth and helps us achieve our purpose:

We help people secure their future and protect the ones they love.”

– Roger Crandall, Chairman, President and CEO
Massachusetts Mutual Life Insurance Company (MassMutual)

Our Vision: To provide financial well-being for all Americans.

MassMutual's Journey of LGBTQ Advocacy

A historical timeline highlighting
MassMutual's ongoing commitment
to the LGBTQ community



Our Support Through the Years...

Massachusetts Mutual Life Insurance Company (MassMutual)

MassMutual works hard to improve Lesbian, Gay, Bisexual, Transgender, and Queer or Questioning (LGBTQ) inclusion for our employees and customers.

Since 1998 when domestic partnership benefits were added to the Company's Human Resources policies, MassMutual has created inclusive employee programs so that everyone can bring their authentic selves to work

each day. At the same time, the Company has consistently advocated for the LGBTQ community, supporting equality through legal activities and sponsoring local and national LGBTQ organizations.

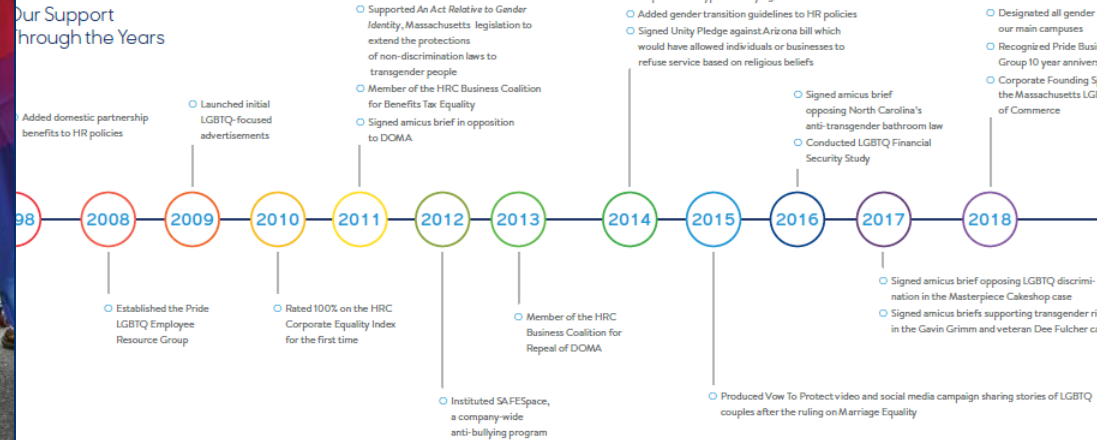
MassMutual strives to be the financial services company of choice for members of the LGBTQ community, to help them secure their future and protect the ones they love.

"We recognize that diversity and inclusion is a catalyst that fuels our growth and helps us achieve our purpose: to help people secure their future and protect the ones they love."

ROGER CRANDALL, CHAIRMAN, PRESIDENT AND CEO



Our Support Through the Years



SPONSORSHIPS

- AIDS Foundation of Western Massachusetts, 2013-2014
- Cycle for the Cause, 2017-2018
- Gay Games IX, 2014
- GLSEN (Gay, Lesbian & Straight Education Network), 2009-2015
- Hartford Gay & Lesbian Film Festival, 2011-2014
- Hartford Gay & Lesbian Health Collective, 2011-2014
- Lavender Law®, 2014-2015
- NGLCC (National Gay & Lesbian Chamber of Commerce) 2014-2015, 2017-2018
- Noho Pride Festival, Northampton, MA, 2009-2018
- Out & Equal Workplace Summit, 2010-2018
- Out100, 2015
- Phoenix Pride Parade, 2016-2017
- Phoenix Rainbows Festival, 2017
- Point Foundation, 2014-2017

RECOGNITION & AWARDS

- Rated 100% on the HRC Corporate Equality Index, 2010-2011, 2014-2018
- Received ERG and Council Honor Award for Pride Business Resource Group, 2016
- Named a Top 10 Company for LGBTQ Employees, DiversityInc, 2014-2015
- Named a Top 50 Company, DiversityInc, 2015
- Named One of 25 Noteworthy Companies for Diversity, DiversityInc, 2010-2014

For more information about MassMutual's commitment to diversity and inclusion, visit www.massmutual.com or find MassMutual on Facebook, Twitter, LinkedIn, YouTube, Google+ and Pinterest.



Supporting the LGBTQ Community Through the Years

MassMutual promotes inclusive employee programs and business practices, as well as supports local and national LGBTQ organizations and legislation



Key Highlights

In 1998, MassMutual added domestic partnership benefits to our HR policies. In 2008, a handful of associates gathered in the basement, developed a mission, created a leadership team, determined short and long term goals and developed a business plan to accomplish them.

Since the founding of our Pride ERG, MassMutual has focused on being an advocate for LGBTQ equality. Some highlights of our involvement include:

- Supporting Massachusetts legislation acts to extend non-discrimination protections to transgender people as well as protections against bullying in schools
- Signing Unity Pledge against AZ bill allowing refusal of service based on religious beliefs
- Member of HRC Business Coalitions for Benefits Tax Equality and the Repeal of DOMA
- Nurturing safe spaces for our associates at work, adding gender transition guidelines to our HR policies, and designating all gender restrooms on our main campuses.



Legal Support

MassMutual consistently advocates for the LGBTQ community, supporting equality through legal activities and pro bono work.

- Signing multiple amicus briefs
 - opposition to DOMA
 - opposition to NC anti-transgender bathroom law
 - opposition to Masterpiece Cakeshop LGBTQ discrimination
 - supporting transgender rights in the Gavin Grimm and veteran Dee Fulcher cases
 - Opposing employment discrimination in the Horton case
- Pro bono legal support within the LGBTQ community
 - LGBTQ refugee advocacy
 - Military discharge status advocacy



Roundtable Exercise

What are one or two things your organization is currently doing to support LGBTQ equality?

Are these typically shared outside the walls of your company? Why or why not?



Linking the Mission of the Pride BRG to the business

Ways to evolve your ERG/BRG and
increase opportunities for its
members to influence and support
your business



Mission/Vision of the Pride BRG

We provide value to the enterprise by driving awareness and action on critical LGBTQ topics for MassMutual, our advisors, and our community to develop a diverse, inclusive, and productive workplace.

PRiDE
MassMutual BRG

How we work towards fulfilling our mission

MassMutual's Pride BRG supports the business and has fun throughout the year. Some examples from just this year include:



- Sponsoring Pride events in our main campus communities
- Advocating for gender neutral bathrooms on campus
- Reviewing and providing feedback to LGBTQ marketing materials
- Supported MassMutual becoming a founding member of the MA LGBT Chamber of Commerce
- Reviewing executive communications on Diversity for CEO

How we work towards fulfilling our mission

MassMutual's Pride BRG supports the business and has fun throughout the year. Some examples from just this year include:

- Partnered with other BRGs for Marquee Event (Eric Alva)
- Helped to update our gender transition HR policies
- Supported Cycle for the Cause
- Organized volunteers for multiple community outreach opportunities (Point Foundation)



Roundtable Exercise

What are some of the ways your ERG/BRG help to support the purpose, mission, or vision of your organization?

If it doesn't, what are some things you can takeaway to try?



How LGBTQ advocacy has impacted our marketing strategy

- Market Research & Insights
- LGBTQ Advertising & Marketing
- Field Advisor Support
- Community Outreach & Support

Market Research & Insights: Understanding the LGBTQ community

LGBTQ American households will represent a minimum estimated **\$304 billion** market opportunity by 2020¹, and LGBTQ Businesses contribute an estimated **1.7 Trillion** to the economy.²

To help us achieve our vision and accomplish our purpose of helping ALL people secure their future and protect the ones they love, we conduct market research on multiple population segments, including the LGBTQ community.

We need to have this research to understand the nuances about what people are feeling, how they are living and what is most important to them – all our research helps guide our advertising and marketing efforts.

Recent examples of our market research and thought leadership include:

- State of the American Family Study (2009, 2011, 2013 & 2018)
- LGBTQ Retirement Savings Risk Study (2018)
- Target Date Fund Study with LGBTQ oversample (2018)

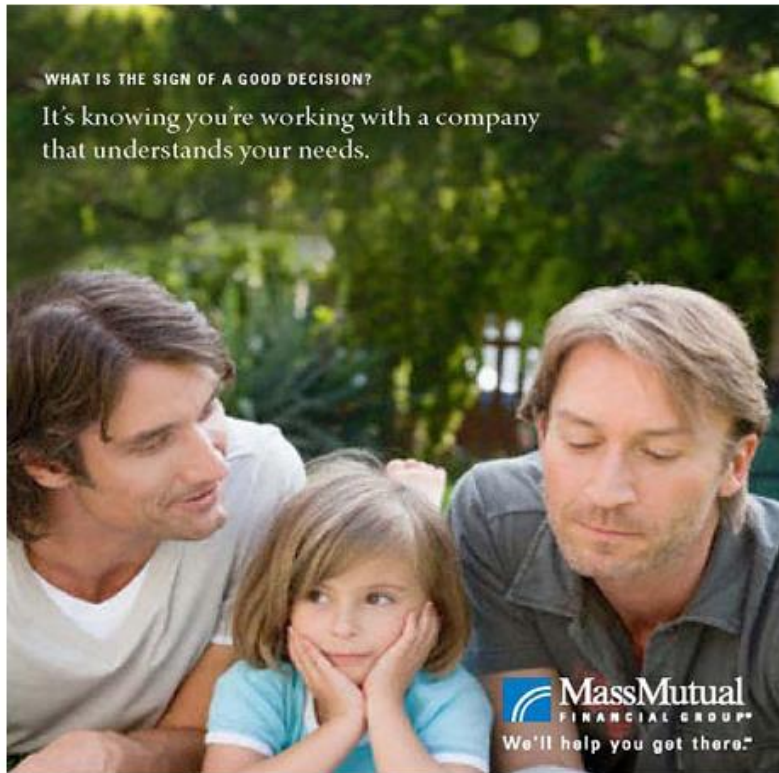
¹ 2017 LIMRA LGBT Ownership Study

² 2016 Economic Study NGLCC



LGBTQ Advertising & Marketing

MassMutual's First Ever LGBTQ Ads (2009)



At MassMutual, we understand you have specific needs and concerns regarding your financial goals. And we're committed to offering products and strategies to help you get there. We're proud to have an inclusive work environment that provides employees a chance to engage, excel and grow. And we're proud of our 100% rating for Diversity and Inclusion from the Human Rights Campaign.¹ It's just another reason why MassMutual is a good decision.

For more information, visit MassMutual.com

LIFE INSURANCE + RETIREMENT(401K) PLAN SERVICES + DISABILITY INCOME INSURANCE + LONG TERM CARE INSURANCE + ANNUITIES + INCOME PROGRAMS

MassMutual Financial Group refers to Massachusetts Mutual Life Insurance Company (MassMutual), its affiliated companies and sales representatives. Insurance products issued by MassMutual, Springfield, MA



At MassMutual, we understand you have specific needs and concerns regarding your financial goals. And we're committed to offering products and strategies to help you get there. We're proud to have an inclusive work environment that provides employees a chance to engage, excel and grow. And for two years running, MassMutual is proud to receive a rating of 100% on the Corporate Equality Index from the Human Rights Campaign.¹ It's just another reason why MassMutual is a good decision.

For more information, visit MassMutual.com

LIFE INSURANCE + RETIREMENT(401K) PLAN SERVICES + DISABILITY INCOME INSURANCE + LONG TERM CARE INSURANCE + ANNUITIES

MassMutual Financial Group refers to Massachusetts Mutual Life Insurance Company (MassMutual), its affiliated companies and sales representatives. Insurance products issued by MassMutual, Springfield, MA

LGBTQ Advertising & Marketing

Vow to Protect Campaign (2015)

How it Started

- How do we mark the momentous Supreme Court decision to legalize LGBT marriage?
- MassMutual took some very public pro-LGBT stances and has a great record as an LGBT employer, but we hadn't done a national LGBT campaign.

Let Consumers Tell the Story

- Letting your consumers have control of your brand is powerful.
- Not scripted, no voice over.

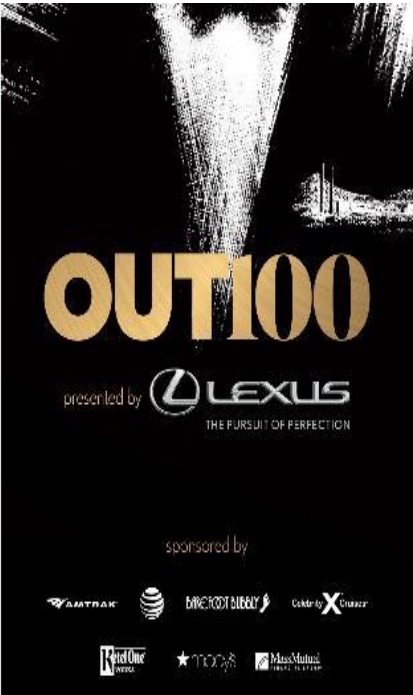
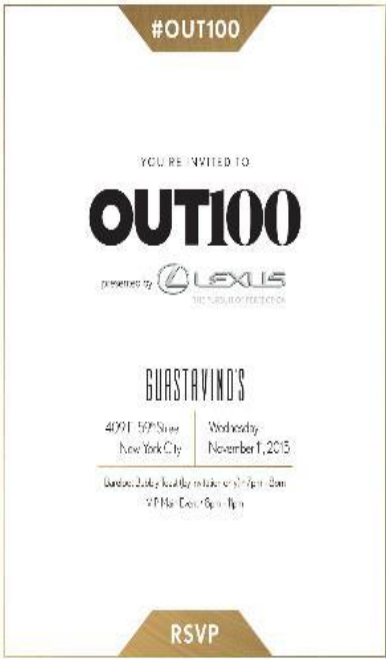
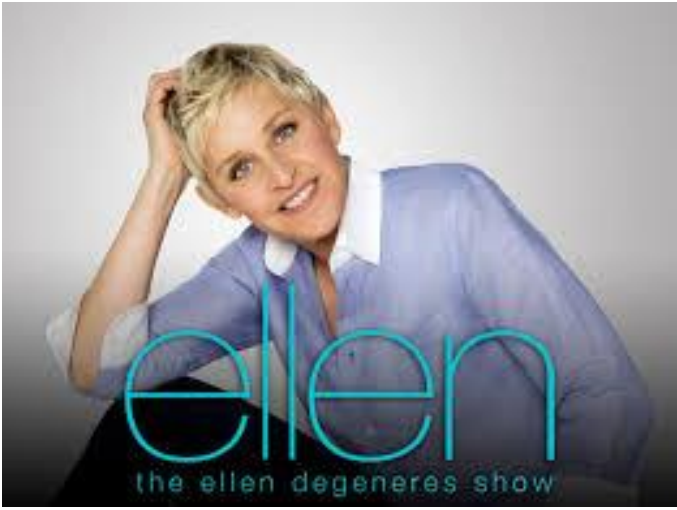


LGBTQ Advertising & Marketing

Vow to Protect Campaign (2015)

Amplification of Advertising

- Early in the campaign, unprompted, Ellen shared our video on EllenTube
- In Phase 4, we did a paid partnership with the Ellen Show and she shared our video during her show and via social and on her websites.



LGBTQ Advertising & Marketing

Vow to Protect Campaign (2015)

Consumer Reactions



Matthew Tenore @matt10ore · 27 Dec 2015

Well... @massmutual just earned my business for life! Great job! 👍
#VowToProtect



jenna dockery @jennasauris · 21 Dec 2015

@massmutual I've watched 100s of YouTube videos. This is the ONLY one I haven't skipped after 5 seconds. Bravo! #vowtoprotect



1



Nadine Silva Kudos to the leadership that supported creating and advocating this message!



Clarissa Landeros This is so heart touching ❤️ I love this video so much.



Robbie Johnson That's why I'm a member of MASS MUTUAL!!!!!!!!!!!!!!!!!!!!

Like · F



Steve Brokaski So proud to be working for MassMutual!!!

Unlike · Reply · Message · 👍 24 · November 6, 2015 at 4:15pm



Nicholas Brackett Me too! This ad was great 😊



Bill Spearhouse I have my 401k at work through them. Good for them.



Mary Davis Walpole Wonderful ! Yay Mass Mutual !

Like · Reply · Message · 👍 2 · January 10 at 5:52pm

LGBTQ Advertising & Marketing

Live Mutual Campaign (2017 - present)

In 2017 MassMutual unveiled the Live Mutual platform, reminding people of the importance of people relying on another, and introduced this point of view to the world.



LGBTQ Advertising & Marketing

Live Mutual Campaign | Progress Ads (2017)

These placements came very soon after the launch of the refreshed MassMutual brand. Showing not just our commitment to the LGBTQ community to put us at the forefront – but showing just how much progress we can make when we all work together.



LGBTQ Advertising & Marketing

Live Mutual Campaign | Mutual Mosaics Activation (2018)

This campaign was focused on Mutual Mosaics, echoing the message that Pride is about celebrating differences, finding similarities, and coming together as one community. Showing that “Great Things Happen When We Stand Together.”



LGBTQ Advertising & Marketing

Live Mutual Campaign | Mutual Mosaics Activation (2018)

MassMutual celebrated our long-standing partnership to the LGBTQ community by highlighting the Mutual Mosaic and Live Mutual platform which featured real-time user-generated GIFs to nearly 1M people at San Francisco Pride, surrounded by robust media support with local and national print and digital.

- Over 600 faces added to a growing mosaic gallery.
- Guests were also encouraged to take selfies at the massive LED Screen Rainbow Wall
- Guests could talk to advisors as well as learn about MassMutual's history of LGBTQ advocacy.



LGBTQ Advertising & Marketing

Live Mutual Campaign | Mutual Mosaics Activation (2018)

Our installation provided a strong onsite experience, helping to create a collective moment as each visitor's face was added to the growing mosaic. This unique interactive experience was something that broke through the crowd and contributed to the interconnectedness that binds us all together.



Guests went through the photo booth experience.



MassMutual offered a full interactive experience.



Every Pride festival attendee has a story to share.





Local MassMutual advisors also participated.

LGBTQ Advertising & Marketing

Live Mutual Campaign | Mutual Mosaics Activation (2018)

MassMutual
July 18 · 🌐

San Francisco Pride was full of love, joy, and encouragement. Great things happen when we stand together. #LiveMutual



Pride is about standing tall...




Connecting with others...

Like Comment

Alex Bohl, Robin Gokei and 2 others like this. Oldest

MassMutual
July 18 · 🌐

San Francisco Pride was full of love, joy, and encouragement. Great things happen when we stand together. #LiveMutual



Celebrating yourself...



Sharing your l...

Like Comment

Alex Bohl, Robin Gokei and 2 others like this. Oldest

MassMutual
July 18 · 🌐

San Francisco Pride was full of love, joy, and encouragement. Great things happen when we stand together. #LiveMutual



Sharing your love...


And comin...

Like Comment

Alex Bohl, Robin Gokei and 2 others like this. Oldest

MassMutual
July 18 · 🌐

San Francisco Pride was full of love, joy, and encouragement. Great things happen when we stand together. #LiveMutual



And coming together as something greater.

Like Comment

Alex Bohl, Robin Gokei and 2 others like this. Oldest

LGBTQ Advertising & Marketing

Live Mutual Campaign | Mutual Mosaics Activation (2018)



LGBTQ Advertising & Marketing

Live Mutual Campaign | Social (2018)

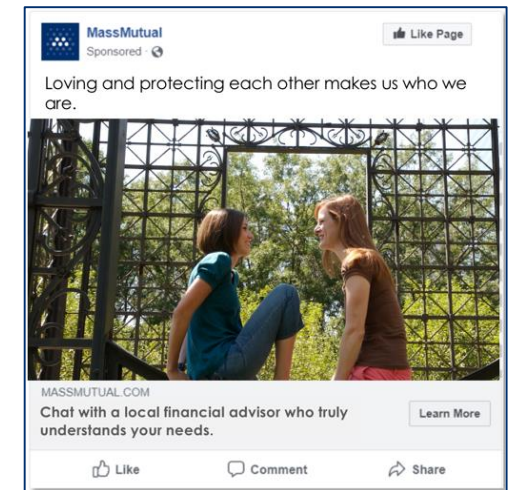
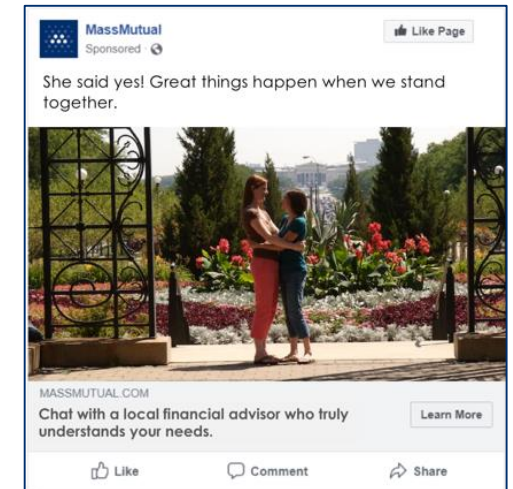
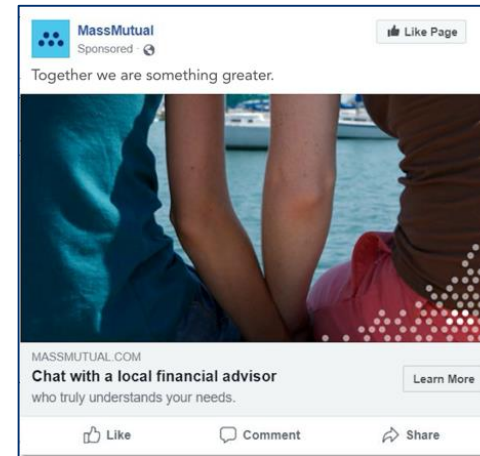
We are also piloting local paid social media campaigns this year, using LGBTQ imagery and recognizable locales from target markets.

Targeted to LGBTQ audiences, using:

- LGBTQ prospecting list
- Custom created Facebook audiences
- Look-A-Like Audiences

Leads were assigned to firms and advisors focused on the LGBTQ market for follow-up.

We understand how important authenticity is within the LGBTQ community, and have been working to identify ways to use authentic imagery.



Evolution of our LGBTQ Advertising

Between 2009 and 2018 we have worked to evolve our LGBTQ-focused marketing and advertising.

- We took a stand!
- **Authenticity** in our ads – real people filmed, sharing their own voices, thoughts, and words – unscripted.
- **Experiential advertising** – immersion in the community participating and supporting local events.



Roundtable Exercise

Are your company's marketing strategies and campaigns influenced by the support they provide for the LGBTQ community, vice versa, or not at all?



Field Advisor Support



Helping our Advisors help the LGBTQ community

LGBTQ market segment resources are open to all advisors, but we focus with select firms and advisors who have indicated that they want to focus on this community.

We want to ensure that Advisors working within the community truly understand the needs of LGBTQ individuals and families, and that they have the information and resources to help them secure their future and protect the ones they love.

Examples of our firm & advisor support include:

- Local Activation Toolkits
- Bi-monthly National LGBTQ Marketing Calls
- LGBTQ tailored marketing materials
- Market research findings
- National NGLCC partnership
- Diverse Market & LGBT Careers web content for firm websites
- Firm LGBTQ Advisor recruiting video



Community Outreach & Support



Sponsorships and community giving

Our LGBTQ-focused corporate sponsorships and partnerships have been influenced by our Pride BRG over the years, and we continue to rely on our Pride BRG membership to help support many of our sponsored events.

At MassMutual we work in partnership with our Community Responsibility area as well as the MassMutual Foundation to support LGBTQ-focused non-profit organizations and events.

Examples where our Pride BRG influenced or provided support to a sponsorship include:

- Noho Pride Festival (Northampton, MA)
- Phoenix Pride & Rainbows Festival (Phoenix, AZ)
- Lavender Law
- Point Foundation
- GLSEN (Gay, Lesbian & Straight Education Network)
- Cycle for the Cause



Cycle for the Cause

As a sponsor of Cycle for the Cause, MassMutual wanted to do more than just donate money to a worthy cause. We fielded a team of riders, created a welcome video brochure for riders and volunteers, and started a corporate giving campaign.

Our strength is each other

MassMutual is founded on the principle of people protecting people - all people. By loving the ways we're different, we can learn from, support, and look out for one another. We're proud to be a sponsor of the 2018 Cycle for the Cause, a 275-mile Boston-to-NYC bike ride that raises money and awareness in the fight to end HIV/AIDS.

MassMutual's ongoing commitment and partnership to the LGBTQ community

- 1998 Added domestic partnership benefits to HR policies
- 2008 Established the Pride LGBTQ Employee Resource Group
- 2009 Launched initial LGBTQ-focused advertisements
- 2010 Rated 100% on the HRC Corporate Equality Index for the first time

We also launched a web-based and social media advertising campaign with opportunities for our advisors to post Cycle-related posts in advance and during the race.

Our LGBTQ landing page was also updated for this event, adding photos of our team from last year and featuring the Cycle for the Cause event.

Sponsorship of events like Cycle for the Cause directly ties in to our founding principle of people protecting people - all people.



Cycle for the Cause

Our social media and web campaigns around this event were focused on our MassMutual team riders and other Pride BRG members, and their Acts of Mutuality.



Roundtable Exercise

What is one thing that you want to take away from today's session and bring back to your company?



Final Thoughts & Questions?



Survey





©2018 Massachusetts Mutual Life Insurance Company (MassMutual), Springfield, MA 01111-0001.
All rights reserved. www.MassMutual.com
CRN202009-236892