

March 2026

# **BRAND STRATEGY & MARKETING COMMUNICATIONS PORTFOLIO**

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J.B. Davis

[jonathanburtondavis@gmail.com](mailto:jonathanburtondavis@gmail.com)

<b>VALUE PROPOSITION</b>	<b>Page 3</b>
<b>CURRENT WORK</b>	<b>Page 4</b>
<b>CORPORATE CASE STUDIES</b>	<b>Page 6</b>
<b>NONPROFIT CASE STUDIES</b>	<b>Page 20</b>

## **VALUE PROPOSITION**

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**My Diverse Background – from  
Brand Strategy for Global Leaders  
Through Marketing  
Communications for Local  
Nonprofits – Demonstrates a  
Strong Track Record of Delivering  
Actionable Programs That Meet  
Objectives**

## **CURRENT WORK**

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**Co-facilitator of Temple Emanu El's  
Strategic Planning Process and  
Chair of the Board's Marketing  
Committee**

# DRAFT GOALS TO SUPPORT VISION

## Vision

Goal #1

Goal #2

Goal #3

Goal #4

Goal #5

Enrich the  
Lives of  
Congreg  
Supple  
Jewish  
Comm  
Mem

## The Strategic Planning Resource Guide

### Introduction

The purpose of this document is to provide members of the Strategic Planning Task Force with the resources they need to develop detailed plans for the finalized Goals. Although the information below is often robust, there are also many projects and different

#### Strategic Planning Task Force

Work-in-Progress Meeting of Subcommittees – Thursday February 26<sup>th</sup>

#### Tonight's Format

Provide Subcommittees Opportunities to Share Initial Thinking

Provide Full Team Opportunities to Provide Feedback on Those Perspectives

Discuss Next Steps

#### Tonight's Caveat

Formats Varied by Subcommittee, Which Is Fine

#### Initial Thinking

6:40 – 6:50 Subcommittee 1

6:50 – 7:00 Subcommittee 2

7:00 – 7:10 Subcommittee 3

7:10 – 7:20 Subcommittee 4

7:20 – 7:30 Subcommittee 5

#### Feedback

7:30 – 8:15 What Themes Are You Hearing?

What Challenges Are You Seeing?

What Knowledge Gaps Are You Finding?

#### Next Steps

8:15 – 8:30 Review Jewish Cleveland Report for Possible Implications (All, Soon)

Determine Overlaps (Suzy and J.B., Immediately)

Refine Work (All Members, February 27<sup>th</sup> – March 31<sup>st</sup>)

Connect w/Other Teams (Select Members, March 31<sup>st</sup>)

Submit Objectives in Template to Suzy and J.B. (Team Lead, March 31<sup>st</sup>)

Connect the Dots 1.0 (J.B./Suzy, April 1<sup>st</sup> – April 20<sup>th</sup>)

Connect the Dots 2.0 (J.B./Pam/Renee/Suzy, April 1<sup>st</sup> – April 20<sup>th</sup>)

Present to Board (J.B./Suzy, April 21<sup>st</sup>)

Recalibrated Vision, Developed Goals to Support Vision

Empowered Task Force Members with Key Resources

Co-Facilitating work of Task Force Subcommittees, Will Develop Plan Based on Deliverables

## **CORPORATE CASE STUDY 1**

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**Partnered with COO and Marketing Agency to Better Connect Iconic Brand with Its Target to Drive Same Store Sales**

## Role and Results

Firestone Complete Auto Care was the market leader but wasn't hitting growth targets because the in-store CX was more aligned with car enthusiasts than their actual target, married women with children at home. As the Manager of Brand Strategy, I partnered with the COO to develop the research-based positioning/tagline – “The experience you want” – that addressed the need for a more engaging CX supported by expertise, provided guidance to colleagues to infuse the thinking in their store of the future design, and drove revenue by elevating the presence of maintenance and repair to the same level as tires. We also streamlined the complex brand architecture by eliminating the redundant Mastercare service brand, introduced a new name, and worked with an agency to develop the messaging hierarchy, personality, and standards. To ensure buy-in, I presented to the Board and store employee meetings. The program rolled out nationally and drove same-store sales by 3-7%.

## Skills

Understand Market Dynamics | Build Differentiated Positioning | Ensure Brand Alignment

Develop Compelling Touchpoints | Craft Powerful Messaging | Articulate Enterprise Narrative

Manage Complex Initiatives | Disseminate Best Practices | Lead Innovation Initiatives | Partner with Leadership

From



To



From



To



The experience you want.™

## **CORPORATE CASE STUDY 2**

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**Developed Strategy  
Tools, Services, and  
Training That Empowered  
Colleagues to Drive Organic  
Growth**

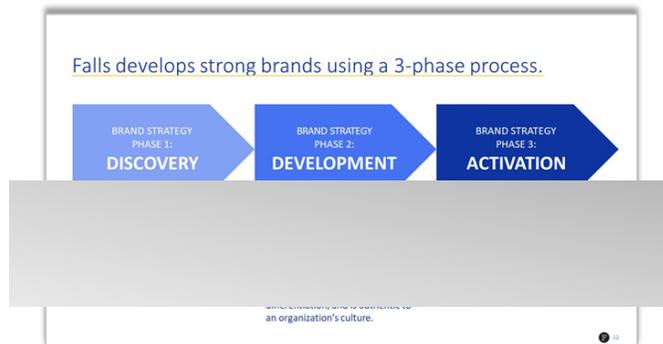
## Background

Falls & Co., a mid-size public relations and communications agency, wanted to grow topline revenue by expanding into adjacencies.

## Role and Results

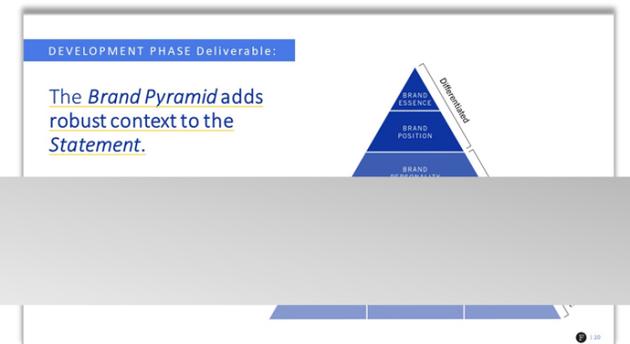
Hired to start the Brand Strategy Practice, I built the foundation for selling, collaborating, and delivering projects.

Brand Education Sessions	The Falls Brand Toolbox	Falls Thought Leadership	The Solve™ Development Labs	The Pulse™ Brand Health Report
Seminars That Provided Colleagues an Overview of Branding Best Practices and the Proprietary Ways Falls Creates Value	“Living Document” That Was Regularly Updated So Proprietary Methodologies and Deliverables Could Be Consistently Delivered	Series of Long-Form Blog Posts That Aligned with The Falls Brand Toolbox and Positioned Agency as a Thought Leader	Workshops That Partnered Senior Clients and Agency Managers to Address Discrete Business Challenges	Holistic View Across Myriad of Internal and External Drivers for Smaller Clients Without Internal Analytic Functions



“Very informative, presenter was understanding of content and the explanation helped so that in client work we feel empowered to pitch the service (and speak about it if service is being implemented).”

-Falls manager who attended seminar



“J.B. presented at agency-wide Lunch & Learns on “branding 101” and on the tools and services he developed as the Practice leader. Quantitative and qualitative survey results from those presentations were outstanding and...helped Falls accomplish its objectives.”

-Falls Chief People Officer

## **CORPORATE CASE STUDY 3**

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**Managed Co-Creation  
Initiative That Ensured  
Messaging Supported  
Manufacturer's \$8B  
Merger**

## Role and Results

Parker Aerospace's merger with Meggitt would expand its market leadership and increase shareholder value. But the two companies had very different cultures, and the marriage would only work if it articulated a "1+1=3" proposition.

As the leader of The Solve™ Development Labs (an offering I had developed for Falls), I led a 3-co-creation engagement. We conducted pre-workshop interviews with senior managers from both companies to frame market dynamics and identify areas of potential alignment. Next, I facilitated workshop conversations that guided them toward a unified post-merger positioning. And after the workshop, we conducted customer interviews that informed the final brand messaging.

The initiative positioned the company for the critical Paris Air Show because it was based on a "1+1=3" proposition, reduced marketing costs, and drove incremental revenue for the agency.

## Skills

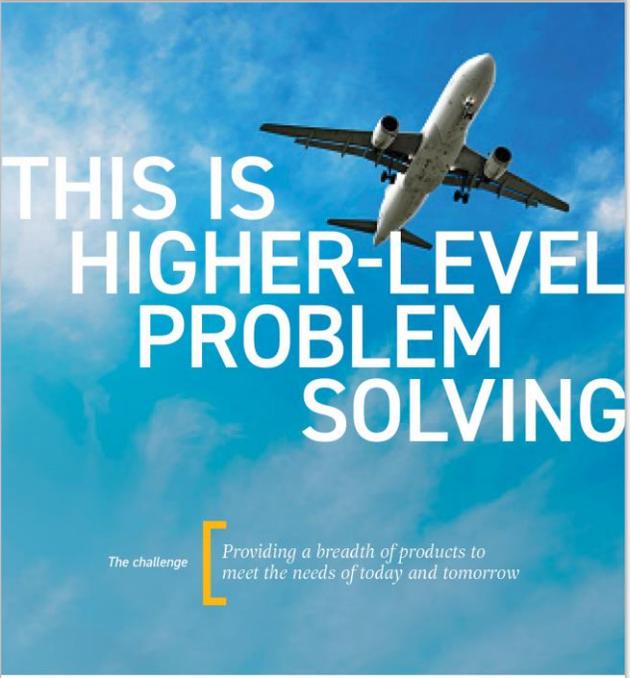
Understand Market Dynamics | Build Differentiated Positioning | Ensure Brand Alignment

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the  
**Solve**  
F

Affordable, collaborative, strategic  
workshops to help you get solutions  
quickly



THIS IS  
HIGHER-LEVEL  
PROBLEM  
SOLVING

*The challenge* [ Providing a breadth of products to  
meet the needs of today and tomorrow

At Parker Aerospace, our passion is helping our partners thrive with the right products, the right systems and the right solutions across the entire aircraft. We're not only here to help your bottom line, we'll help you achieve the extraordinary. And together, there's no telling how far we can go.

**Parker** Aerospace  
ENGINEERING YOUR SUCCESS.

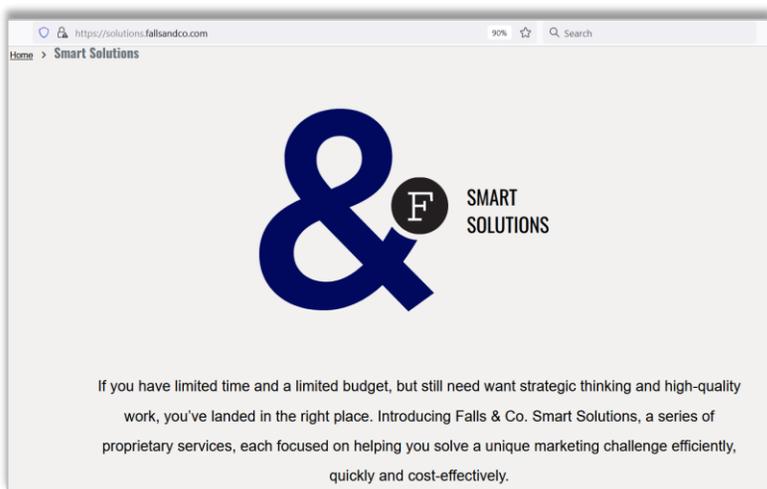
## **CORPORATE CASE STUDY 4**

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**Supported Legacy Brand's  
Growth By Bringing to  
Market Unique Offering in  
Adjacent Category**

## Role and Results

Identified two market opportunities to grow Falls & Co.'s topline revenue. Developed and brought to market *The Solve™ Development Labs*, workshops that partner senior clients and agencies to address discrete business challenges. Developed and brought to market *The Pulse Brand Health Report*, holistic view across myriad metrics. Successfully managed multiple engagements.



## Skills

Understand Market Dynamics | Build Differentiated Positioning  
Develop Compelling Touchpoints | Craft Powerful Messaging  
Facilitate Actionable Brainstorming | Manage Complex Initiatives | Lead Innovation Initiatives | Partner with Leadership

# THE SOLVE™ DEVELOPMENT LABS ARE A STRATEGY FOR YOUR STRATEGY.

THE SOLVE™ is an affordable, collaborative, strategic workshop that brings relevant experts from your organization and ours together to quickly identify, co-create and deliver quality solutions to your business challenges in a workshop setting.



## PRE-WORKSHOP DISCOVERY

DAYS  
**1-10**

Falls & Co. reviews materials, conducts research and surveys workshop participants to ramp-up.

What problem do you want to solve?  
Who else is solving this problem?  
What are potential approaches to solve this problem?

## AT-WORKSHOP DEVELOPMENT

DAY  
**11**

Senior client and Falls & Co. managers work in a structured converge/diverge/rank co-creation workshop.

What are the upsides and downsides of each approach? How would you define success? Which approach is both actionable and measurable?

## POST-WORKSHOP ACTIVATION

DAYS  
**12-15\***

Falls & Co. refines the top choices identified at the workshop and develops an action plan.

What specific activations would you undertake?  
What are the go/no go parameters?  
What's next?

## BUSINESS CHALLENGES

An outside perspective during planning season would be invaluable – but hiring a consultant can be cost prohibitive.

Developing creative solutions to market shifts can drive growth – but only if the proposal gets internal buy-in first.

Talented staff and trusted agency partners can help strengthen the brand – but it can be easy to fall into the same old trap.

**YOU'RE STUCK. WE GET IT. AND HAVE A SOLVE.**

## BENEFITS

**FLEXIBLE** – Falls & Co. can build a custom Lab if the current ones (Brand Messaging, Strategic Planning, Media Training, and Content Strategy) aren't right.

**FOCUSED** – Tapping the appropriate people and empowering them to get into roll-up-your-sleeves mode produces a wide-range of ideas focused on a tightly defined problem.

**SELLABLE** – The combination of a defined problem to solve, a short time-frame (usually 2-3 weeks), and co-creation model improves the odds for selling in programs.

**ACTIONABLE** – Work for a \$4 billion merger illustrates how the right pre-work (desk research and questionnaire), people (corporate and merged enterprises), and focus (1+1=3, key upcoming trade show) can create branding that breaks through the clutter.

## **CORPORATE CASE STUDY 5**

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**Led Development of Global  
Employment Brand That Provided  
a Competitive Advantage and  
Reduced Marketing Costs**

## Role and Results

A top five pharma brand had a critical need to retain and attract talent at scale, but their efforts were hampered by decentralized messaging and design.

As a senior member of a consulting team, I led the development of a global employment brand that provided a competitive advantage and reduced marketing costs. I conducted global c-level interviews, analyzed the competition, and incorporated client input. By synthesizing primary research with colleagues' findings, I uncovered a key insight: Regardless of country, vocation, or seniority, applicants shared a common desire to make a difference. The positioning/tagline I crafted – “Many paths. One goal.” – was a succinct and powerful message that provided direction for content development and design.

By creating a unified story and executing it more consistently, the initiative drove down attraction and retention costs.

## Skills

Understand Market Dynamics | Build Differentiated Positioning | Ensure Brand Alignment

Articulate Enterprise Narrative

Manage Complex Initiatives | Partner with Leadership

## **NONPROFIT CASE STUDY 1**

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**Managed Foundation-Funded Co-  
Creation Workshop to Ensure  
Brand and Website Supported  
Cleveland Nonprofit's Growing  
Social Services Offerings**

# TODAY

## ROLEPLAYING EXERCISES

*Understanding Stakeholder Needs and Crafting Relevant Messages That Address These Motivations*

Maria - Client  
Joe - Foundation Officer  
Sarah - Individual Donor

11:00-11:10				11:10-11:30	11:30 - 12:00	12:00-12:45	12:45-1:00	1:00-1:30
1 DEFINITION	2 CONTEXT	3 IMPACT	4 OBJECTIVE	5 IDEAS	6 EXERCISE A	7 EXERCISE B	8 EXERCISE C	9 NEXT STEPS (OPTIONAL)

## 2. CONTEXT

### THERE'S NO CONTEXT FOR THIS MODEL

While serving the needs of both pets and their owners is based on demonstrably effective ways to support families, it's a more holistic approach than the ways most other nonprofits and government agencies deliver services, so there's no context to understand Neighborhood Pets' model

### DONORS ARE NARROWLY FOCUSED

Individual donors and foundations are focused on supporting "Issue X" or "Issue Y", not "Issue X and Issue Y"

### IT'S REALLY HARD TO CONNECT

Americans are time-pressed and over-messaged, so asking them to "work harder" to understand a proposition can be challenging

### THE BUDGET ISN'T ADEQUATE

Neighborhood Pets, like most nonprofits, doesn't have the marketing budget to articulate its complex case for support

## **NONPROFIT CASE STUDY 2**

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**Led Team That Helped Global  
Nonprofit Better Align Its Brand  
with Its Mission**

## Role and Results

The mission of The Menopause Society is to be *the* global resource for providers. But at the beginning of a website engagement, I identified a critical challenge: They had been engaging in broader consumer conversations but didn't have the resources to establish an authoritative voice. This diluted the strong brand that had been supporting its mission. As the Director of Brand Strategy, I helped my co-worker design research to generate relevant branding input, developed insights-based positioning, evolved their name, and partnered with colleagues to infuse the strategy into the new logo, tag, content, UX, design, and marketing. The positioning – “Leading the Conversation” – refocused The Menopause Society toward empowering professionals who, in turn, improved women's health. The strategy unanimously passed the board and helped the client drive social engagement, more efficiently deploy staff resources, and better support the brand's critical trust attribute. *And it positioned them to receive a transformational \$5M gift.*

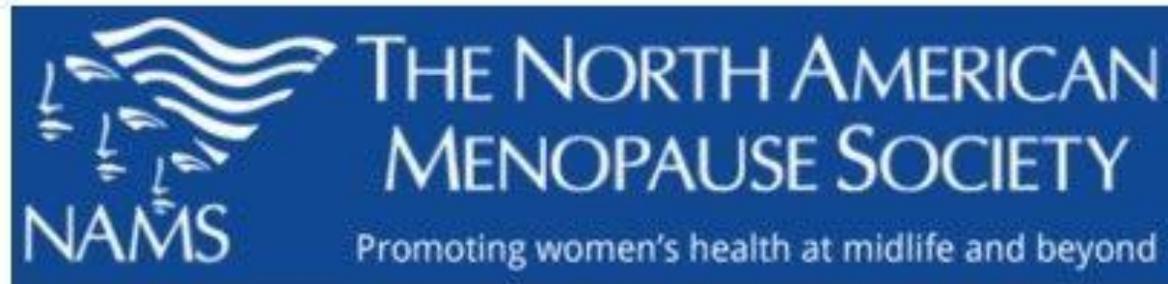
## Skills

Understand Market Dynamics | Build Differentiated Positioning | Ensure Brand Alignment

Develop Compelling Touchpoints | Craft Powerful Messaging | Articulate Enterprise Narrative

Manage Complex Initiatives | Disseminate Best Practices | Partner with Leadership

From



To



The  
**Menopause  
Society™**

*Leading the Conversation*

# The Menopause Society to Launch NextGen Now Initiative to Transform Menopause Training

June 4, 2025

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*Anonymous donor provides \$5 million to fund an innovative initiative that will improve midlife care*

CLEVELAND, Ohio (June 4, 2025)—Despite affecting half the population, menopause remains one of the most overlooked and underserved areas in medicine. The Menopause Society believes women deserve better and aims to address this vast unmet need through the NextGen Now initiative. This \$10 million comprehensive training program is designed to equip current and the next generation of healthcare professionals with the knowledge, tools, and support needed to improve the care of midlife women. An anonymous grant of \$5 million will launch the NextGen Now initiative this summer.

Through the NextGen Now initiative, The Menopause Society is committed to reaching 25,000 healthcare professionals within the next 3 years. These professionals include women's health physicians, nurse practitioners, physician assistants, and trainees. Those involved in midlife women's health are expanding exponentially, yet most receive little to no guidance on menopause.

"We have long recognized that education on midlife women's health and the menopause transition has been woefully inadequate," says Dr. Stephanie Faubion, medical director of The Menopause Society. "The mission of our organization is to empower healthcare professionals to improve the health of women during the menopause transition and beyond. This includes providing the resources and knowledge they need to improve the health and quality of life of their patients."

The NextGen Now initiative will include development and implementation of curated and immersive training experiences for healthcare professionals, study materials, scholarships, and new position statements and consensus recommendations, among other resources.

"We are thrilled to have a benefactor who is as passionate about improving midlife women's health as we are and who is aligned with our commitment to providing evidence-based resources to help accomplish this," says Dr. Claudio Soares, president of The Menopause Society. "The NextGen Now initiative includes additional components, exploring the use of augmented and virtual reality. The Society is now seeking to secure \$5 million in matching funding to support these innovative training methods."

## **NONPROFIT CASE STUDY 3**

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**Managed Innovation Lab That  
Identified Social Impact  
Opportunities for National  
Nonprofit Trade Association**

## Background

Falls & Co., a mid-size agency with a 33-year track record in public relations and communications, wanted to grow topline revenue by expanding into agencies. I identified two opportunities, the first of which was The Solve™ Development Labs. The Labs are workshops that partner senior clients and agencies to address discrete business challenges.

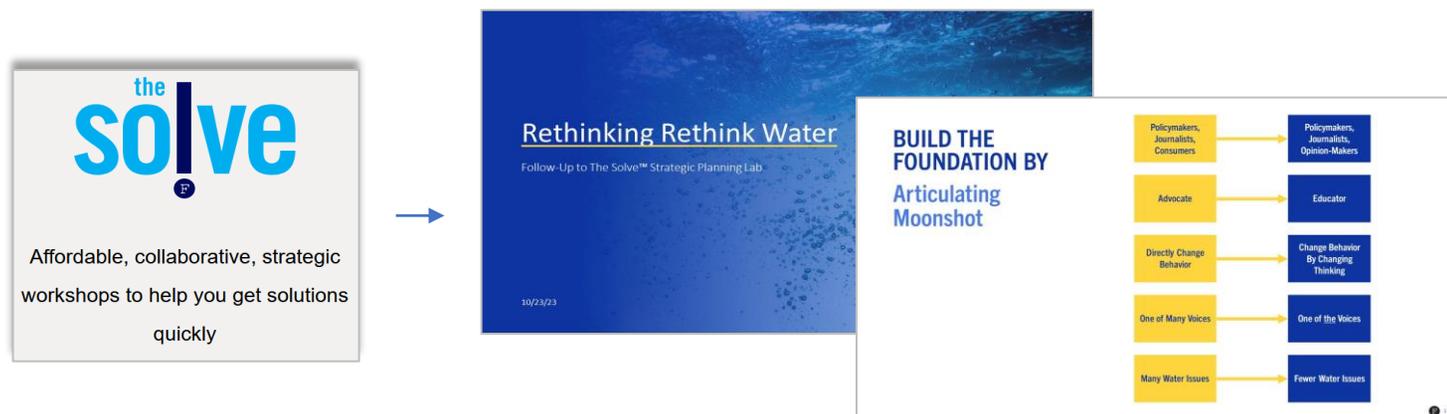
## Role and Results

Falls employed The Solve™ Development Labs for Plumbing Manufacturing International (PMI), a trade association representing companies that produce 90% of the United States' plumbing products and face the market with 150 brands. PMI's primary social impact initiative, Rethink Water, had been strongly supported by members since its inception but faced significant challenges being heard in environmental conversations dominated by significantly larger non-profits. I managed The Solve™ Development Labs, which conducted pre-workshop stakeholder interviews and competitive analyses, featured a half day workshop with PMI Board members from across the U.S., and resulted in an overall framework and specific recommendations to "rethink Rethink Water." Metrics included 100% Client Satisfaction Rating and 2 Strategic Recommendations developed.

## Skills

Understand Market Dynamics | Build Differentiated Positioning

Facilitate Actionable Brainstorming | Manage Complex Initiatives | Lead Innovation Initiatives | Partner with Leadership



## **NONPROFIT CASE STUDY 4**

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# **Crafted Brand-Driven Marketing Communications to Engage Members and Prospects During Covid**

## Role and Results

A Reform synagogue had been established in the community for 75 years. But it faced the same challenges confronting almost all U.S. houses of worship: Americans' affiliation had been declining for a generation – and COVID amplified the trend.

As the Director of Engagement and Marketing on a two-year foundation grant, I created new ways to connect. One example is that recognizing the need to replace lost physical connectivity, we transformed the temple's poorly read weekly newsletter into an engaging daily publication. The UX and content overhaul drove a 28% increase in engagement and was part of a movement toward integrated marketing. A second example is that observing that programming was created top-down by clergy and staff rather than rising organically from members' needs, I identified a model to foster member-to-member connectivity: small groups who would gather around shared interests. I developed the program with the board and lay leaders. It's in its third year.

## Skills

Understand Market Dynamics | Build Differentiated Positioning | Ensure Brand Alignment

Develop Compelling Touchpoints | Craft Powerful Messaging | Articulate Enterprise Narrative

Manage Complex Initiatives | Disseminate Best Practices | Partner with Leadership

# Addressed Retention Challenge By Fostering Member-to-Member Engagement

## Background

- Over the last generation, many U.S. houses of worship have faced flat or declining membership driven by new alternatives to joining congregations, such as apps and online programming – “flat is the new growth” is the mantra for clergy and lay leaders
- COVID – which overlapped 19 of my 24-month grant as the Director of Engagement and Marketing at a Reform temple – amplified these challenges

## Objective

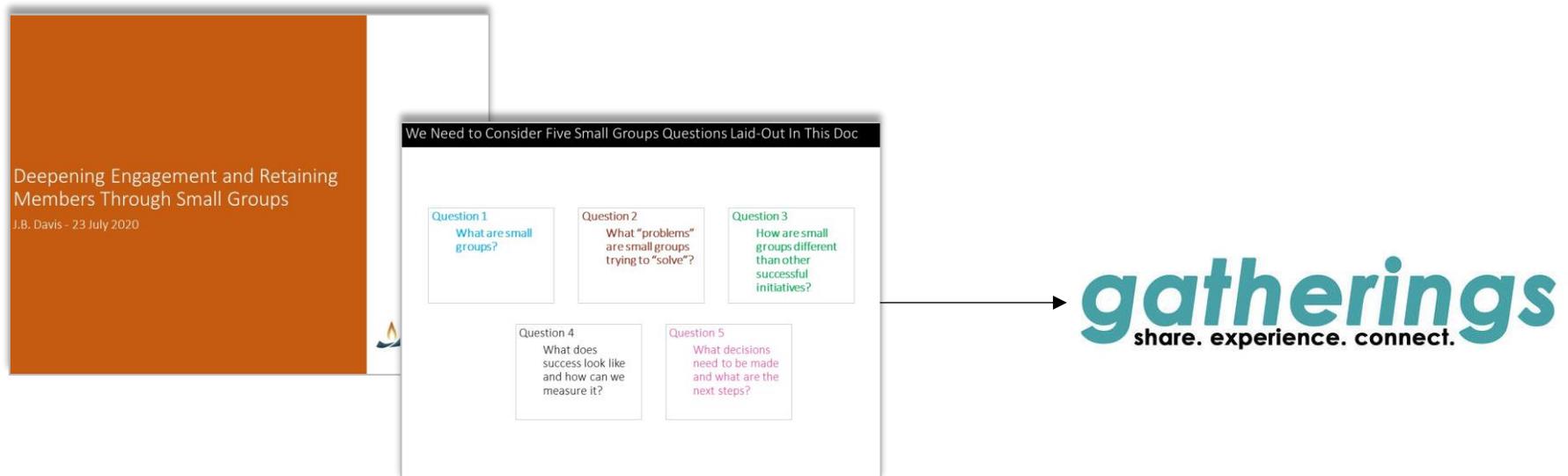
- In this context, it was critical to retain members by deepening their connection to the temple

## Role

- Interviewed Reform lay leaders across U.S. on retention best practices
- Identified that the framework of traditional initiatives – a “do-it-for-me” (DIFM) model where clergy, lay leaders, and staff created programs they believed would be of interest to members – wasn’t always addressing congregants’ needs, a key dynamic for successful retention efforts
- Made business case to clergy, lay leaders, and board to launch a pilot program based on a member-centric “do-it-yourself” (DIY) model
- Partnered with lay leaders to develop, launch, and scale pilot

## Impacts

- Launch was successful, and the program is now in its third year <https://www.suburbantemple.org/gatherings.html>



# Reimagined Essential Touchpoint

## FROM



Online touches (*Temple Times* weekly newsletter, bulletin, site, Facebook, YouTube) not anchored in strategy = untapped advantage in declining “category”

Brand positioning undifferentiated = category’s dynamics exacerbated

Content not linked to narratives and not prioritized = potential storytelling, helping target process information, underused

Inconsistent design across touchpoints = missed opportunities for visual cues, support brand identity

Long text blocks = user experience challenging, particularly on mobile

New graphics regularly created = production traffic jams

Links to off-nav pages = seamless experience missed



## TO

New tag line (“always welcome”) fostered relevant differentiation and expansion via “always learning” etc.

Moved from weekly to daily

Subject line of *TT* previewed new way to engage members with relevant content

Customer-centric redesign of *TT* – 95% of newly scannable content drives traffic to site, consistent look and feel, new messaging hierarchy – transformed it into *the source*

Newsletter’s new tile systems improved UX, reinforced consistency, improved production efficiencies, created opportunities to easily extend messaging to home page, interior pages, and Facebook

Brand voice used humor to cut through category sameness

New strategically grounded content calendar supported both 30,000’ storytelling and program messaging

Site redesign (consistent look and feel, no off-navigation URLs, top programs given dedicated pages, content topics clustered) created powerful and scalable destination from online and offline touches

# Created Consistent Brand Voice

 Suburban Temple-Kol Ami  
Sponsored · 🌐

Yeah. We want to reboot 2020 too. The High Holy Days are a great time to start fresh.

**C T R L**

**A L T**

**D E L**

[HTTPS://WWW.SUBURBANTEMP...](https://www.suburbantemp...)  
Reboot - Suburban Temple - Kol Ami LEARN MORE

whatever and however  
you want to learn,



...at ST-KA you're always welcome.

whatever your stage in life,



...at ST-KA you're always welcome.

## INSIDE VOICE? FEH.



It's time for kids to make really loud Haman videos and for parents to cover their ears.

Suburban Temple - Kol Ami  
[suburbantemple.org/purim.html](http://suburbantemple.org/purim.html)

always welcome.



## Jewish he's not. Wisdom he has.

Today Is *May the Fourth.*

Please interrupt your day-long celebration of all things Star Wars to click to read about the connections between "Jedi-ism and Judaism"

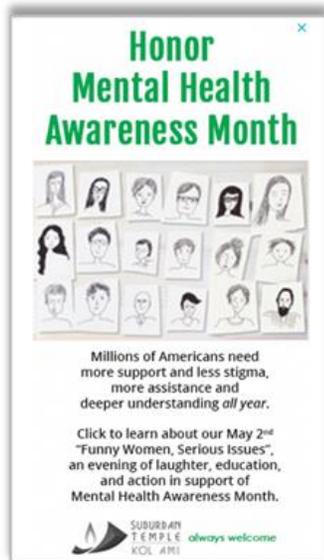
# Developed Integrated Marketing Campaigns

- Integrated campaign with multiple objectives – publicize mental health awareness month, support “always welcome” positioning, build awareness and drive member engagement - resulted in 20% attendance increase over similar event and 4% ad recall for Facebook ad with small budget
- as director of engagement and marketing for Suburban Temple-Kol Ami, crafted strategy, wrote copy, art directed look & feel, developed targeting, liaised with press

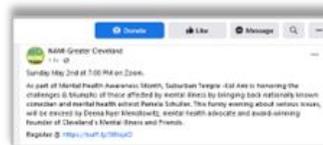
## Paid Media – Facebook



## Paid Media – Digital



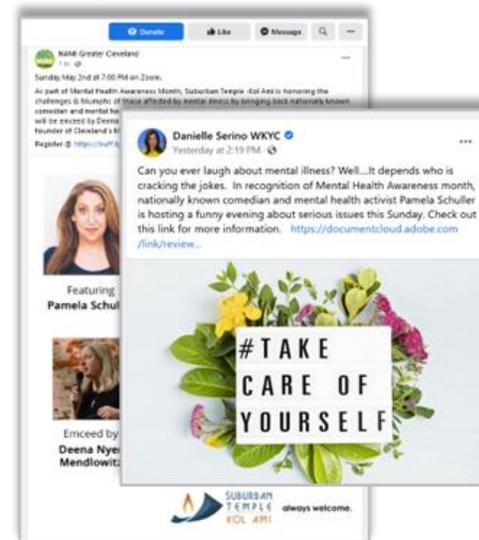
## Community Outreach Social Media/Phone Calls/Emails



## Owned Media – Facebook



## Earned Media – Facebook



## Landing Page



## Paid Media – Print



## Owned Media – Publications



## Earned Media – Print/Digital/TV



## **NONPROFIT CASE STUDY 5**

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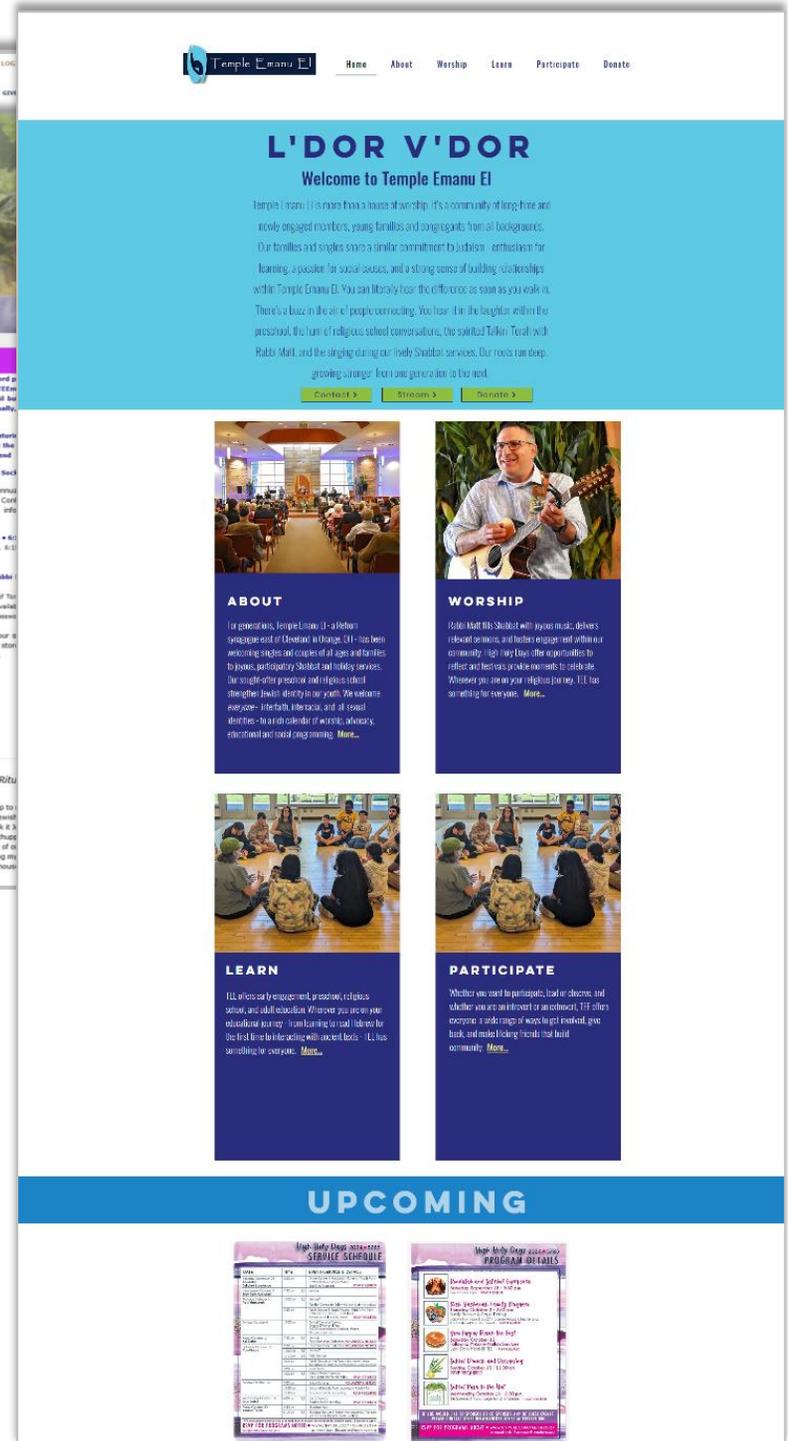
**Led Web Site Development Rooted  
in More Cohesive Narrative,  
Contemporary Look,  
and Mobile-first UX**

Developed Strategy  
 Crafted Narrative  
 Edited Content  
 Created UX  
 Managed Team

From



To



From



**Welcome to Temple Emanu El**

I am so honored to serve as President of Temple Emanu El. With the support of our amazing Rabbi, staff, teachers, Temple Board, and volunteers, wonderful things are ahead for our congregation.

So, how did I get to this place in my life? I married into the TEE family 35 years ago when Rabbi Roberts officiated at my wedding to Lisa. (Her grandparents had become members only a few years after TEE's founding in the 1950's.) We have been active members ever since. Our children grew up at Emanu El, were very active in youth group, and graduated from the Religious School. TEE gave them the knowledge and confidence to go into the world as Jews. TEE is my most important community outside of immediate family.

Both Lisa and I have served on the Board of Trustees. I am a Past President of TEE Brotherhood and have been active on many committees including multiple capital campaigns and our most recent rabbinic search. You may hear my harmonica from time to time when I accompany Rabbi Matt or play in the TEE Chai band.

Temple Emanu El has so much to offer. We have programming that is interesting, educational, and sometimes even fun! There are uplifting services, lifecycle events, along with a supportive and caring community. If you are not yet a member, please visit us for a Friday night service. If you are already a member, I hope you continue to participate in Temple events. We are always glad to see you!

To

# L'DOR V'DOR

## Welcome to Temple Emanu El

Temple Emanu El is more than a house of worship. It's a community of long-time and newly engaged members, young families and congregants from all backgrounds. Our families and singles share a similar commitment to Judaism – enthusiasm for learning, a passion for social causes, and a strong sense of building relationships within Temple Emanu El. You can literally hear the difference as soon as you walk in. There's a buzz in the air of people connecting. You hear it in the laughter within the preschool, the hum of religious school conversations, the spirited Talkin' Torah with Rabbi Matt, and the singing during our lively Shabbat services. Our roots run deep, growing stronger from one generation to the next.