



CASE STUDY

Confidence in compliance: How Jackson scaled employee advocacy

Transforming employee advocacy into a compliant, company-wide movement

www.oktopost.com

Meet Jackson

Jackson is a leading U.S. retirement solutions provider, dedicated to helping Americans pursue financial freedom for life. Headquartered in Lansing, Michigan, Jackson focuses on providing clarity for retirement through a wide range of annuity products and financial planning solutions. With thousands of associates nationwide, the company has established a reputation for empowering advisors and investors with the tools and knowledge they need to make informed decisions about their retirement.



Locations
Lansing, MI



Industry
Financial Services



Company size
1,001-5,000 employees



Featured Solutions
Employee Advocacy

The challenge

Overcoming compliance and hesitation

Navigating social media in a highly regulated industry is a unique challenge. For Jackson, it meant that the company was still defining the role of social media when Michael LaPlaca joined as Senior Social Media Director.

Associates were hesitant to post because of the fear of violating the strict compliance rules of the text content in their posts.

Jackson's social media program needed to overcome a significant challenge: demonstrating the value of social media for the business and its people, while ensuring every post was authentic, compliant, and on-brand.

To overcome the initial hesitation and fear, Michael recognized he needed to do more than just introduce a new platform. He had to build a genuine movement. His strategy focused on three key areas to build a thriving advocacy program:

Strong education: to build an understanding of the toolset, mindset, and skillset required by associates to become part of the Jackson employee advocacy program.

Diverse content mix: create and provide content that associates actually want to share with their social networks.

Encourage authentic sharing: build confidence among associates who are nervous about posting.

The ultimate goal was to transform employee advocacy into something associates saw as a valuable part of their professional identity, not just another corporate task.



Our biggest challenge was figuring out the role of social media in financial services and retirement planning, and how we could connect in a meaningful way with our audience.

— **Michael LaPlaca**
Senior Social Media Director,
Jackson

85%

increase in advocates participating

135%

increase in impressions

94%

increase in content shared

The Oktopost solution

To build a social media advocacy movement, Michael needed a platform that could navigate strict compliance while empowering employees. Oktopost provided Jackson with the foundation, structure, and simplicity it required to build a scalable approach.

Building a foundation for confidence in compliance on social

To navigate a highly regulated industry and build confidence in posting, Jackson integrated a strong foundation of compliance and best practices into its onboarding process. The professional onboarding process was an important part of laying a strong foundation for future advocacy participants who needed to trust the marketing team and be willing to rely on them for content.

By integrating Oktopost directly into a structured onboarding process through a dedicated internal training program called "Jackson University," new employees were required to complete compliance training, connect to Smarsh monitoring, and submit their LinkedIn profiles for review before gaining access to the Jackson advocacy program.

Once approved, Jackson associates could immediately start sharing content. By making compliance and content sharing easy, Oktopost enabled high program adoption, removed any friction, and empowered employees to share brand-approved, authentic content across social media confidently.

The Advocacy Board

The Oktopost Advocacy Board played a key role in building employee confidence. Associates could access pre-approved content in minutes and easily schedule posts in advance, making sharing simple while eliminating the fear of writing and posting the "wrong thing."

Associates didn't need to become social media savvy to find their momentum posting with Oktopost.

With minimal training on the Oktopost platform, they could share content and even see what their peers were sharing right on the Advocacy Board. This immediate and transparent view of content on their Advocacy Board helped them overcome their initial hesitation, allowing them to share confidently and get started in minutes. Oktopost simplified the process, encouraging associates to engage actively in the Jackson advocacy program.



The Advocacy Board is simple to use, which is great. We have prepared content and post texts, and with very little training (5- 10 minutes), our advocates can start sharing and participating in the program.

— **Michael LaPlaca**
Senior Social Media Director,
Jackson

Social campaign management

For Michael's team, Oktopost was a powerful engine for executing social campaigns. It not only streamlined the launch of major initiatives, like their new financial professional site, but also provided the AI and analytics needed to ensure every piece of content was optimized for maximum impact.

With Social BI, the social team tracks the engagement rate as the program's leading success metric, using insights to adjust content formats and advocacy campaign strategies. They also created reports to drill down into campaign types and content types, gaining even deeper insights into the program's performance. The program has evolved from cautious compliance into a confident, fast-growing movement that is now an essential driver of visibility and brand awareness.

This strategic insight into their social campaigns enabled Jackson to transition associates from a hesitant social presence to a confident one.

Transforming social strategy with AI and employee advocacy

The rise of AI-powered search has created both a new challenge and an opportunity for brands in regulated industries, such as finance. As search engines increasingly provide summarized, multi-sourced answers instead of directing users to a single website, the need for a diverse and authentic online presence is more critical than ever. For Jackson, employee advocacy effortlessly transforms associates into authentic brand advocates, ensuring the company is consistently present and credible on social platforms where AI seeks answers.

This strategy addresses the concern of potential misinformation in AI summaries by ensuring that the foundational information is coming from a vetted source, a trusted Jackson associate.

AI-assist

As with most regulated industries, social media presents a unique challenge: ensuring that every piece of content is clear, on-brand, and compliant with strict financial regulations. For Jackson, Oktopost's AI-assist became an invaluable partner in navigating the balance between staying authentic and remaining compliant. Jackson quickly realized the potential of AI-assist to drive efficiency and clarity in each social post by making messages more concise. But the benefits extended far beyond that.

AI-assist helped Jackson maintain a consistent brand voice. By assisting in drafting messages that are more likely to be regulation-friendly, Oktopost's AI-assist provides a crucial first step in its vetting process, giving Michael peace of mind.

Michael also utilizes Oktopost AI-assist to inspire his own creativity, specifically leveraging its "engaging" and "inspirational" options to maintain the brand's authenticity across social media. Best of all, the Oktopost's AI's continuous learning capabilities mean it only gets better at meeting Jackson's needs over time.



AI has already shifted the way buyers find information. Increasingly, users are no longer bothering to visit individual websites listed on page one and instead are relying on AI-generated summaries. But AI summaries are not always accurate, and the misinformation is a significant cause of concern. We focus on best SEO practices and employee advocacy to make sure we are positioned as an authentic leader in financial services and retirement planning.

— **Michael LaPlaca**
Senior Social Media Director,
Jackson

The results

Jackson's relaunch of its employee advocacy program, known internally as "Version 2.0," sparked a true movement across the company. In the first year, the program experienced rapid growth, with an 85% increase in advocates, a 135% increase in impressions, and a 94% increase in shared content. What began with hesitation and concerns about compliance quickly turned into a company-wide push to be present, authentic, and visible on social media.



In less than a year, we saw double and triple-digit growth in every key metric. More advocates are participating, more content is being shared, and the Jackson brand has gained far greater visibility.

— **Michael LaPlaca**
Senior Social Media Director,
Jackson

The numbers highlight the growth, but the bigger success has been the cultural shift. Associates who rarely posted before now share daily, often customizing captions to make the content feel authentic to their voice. One wholesaler who was initially unsure about posting has become one of the most active participants on the Advocacy Board, generating new sales leads from the visibility he created online.

The program has also fostered a sense of pride and community. Posts highlighting Jackson's corporate philanthropy have become the most popular content type, drawing the highest engagement and strengthening the sense that advocacy is more than a task. It has become a way for associates to represent the company's values with confidence.

For Jackson, success is not only about higher impressions and shares. It is about creating a movement where employees feel empowered, confident, and proud to be brand ambassadors. Oktopost helped Jackson prove that employee advocacy can thrive in even the most regulated industries when it is built as a movement that employees genuinely embrace.



The best part has been watching people evolve. Associates who used to hesitate now post daily, adjust captions to sound authentic, and even generate new business opportunities.

— **Michael LaPlaca**
Senior Social Media Director,
Jackson



The B2B social media platform built for growth

Oktopost helps B2B organizations manage, measure, and maximize their social media impact all in one place. From social publishing and employee advocacy to analytics, listening, and marketing intelligence, Oktopost empowers your team to drive engagement, prove business impact, and turn social into a true growth channel. Contact us to see how Oktopost helps B2B brands connect social media to pipeline and revenue.

