

nuveen

A TIAA Company

SWOOP Viva Engage Festival 2025: Nuveen Journey

November 2025

Nuveen Communications

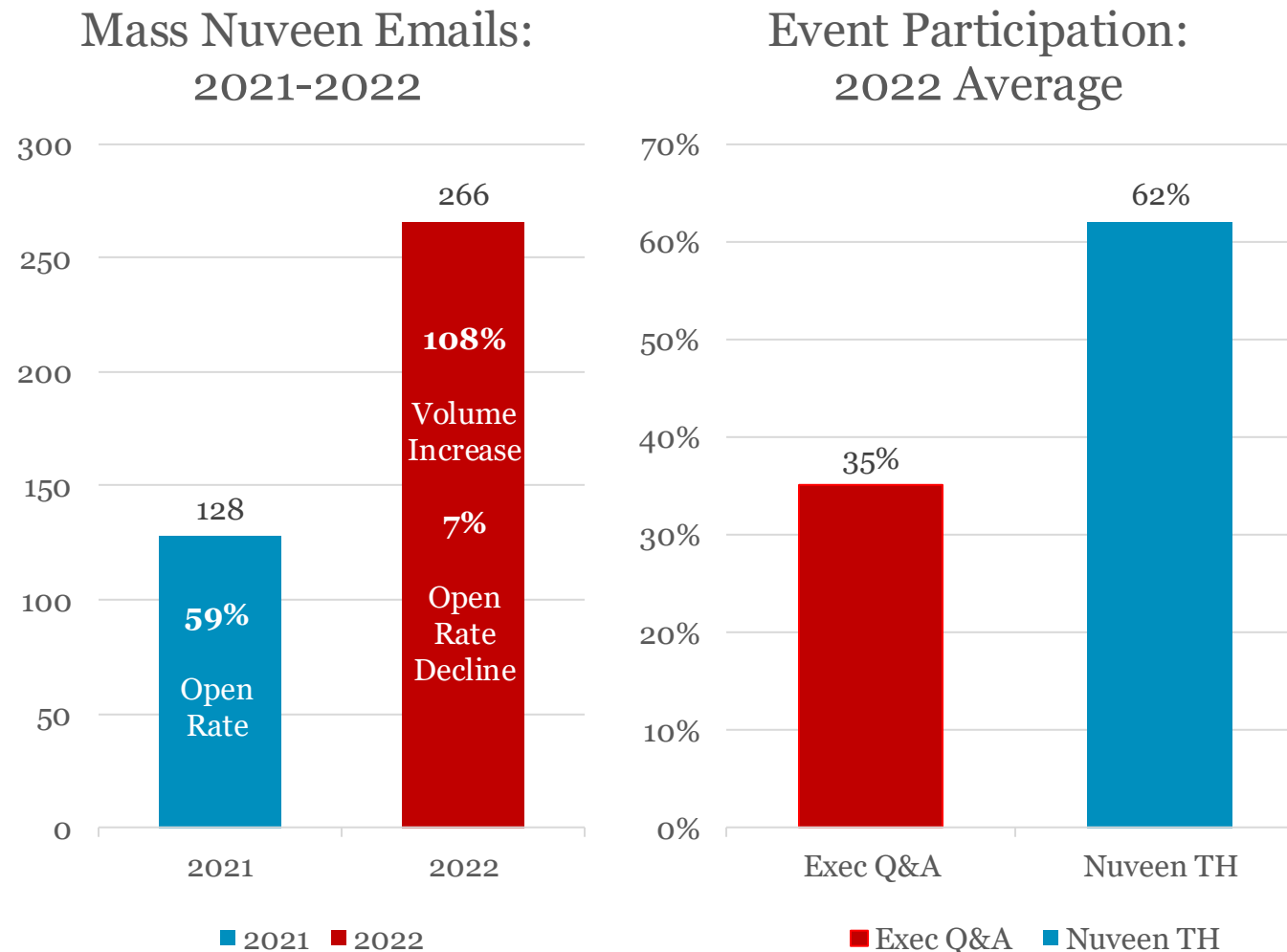
About us

- **Chris Dickey:** Comms Business Partner & Head of Adoption, 10+ years leading content strategy and driving Engage adoption
- **Chris Martin:** Communications Operations Lead, 7+ years operationalizing different solutions for two large asset managers
- **Dan Mulcahey:** Head of Comms Strategy and Operations, 10+ years deploying Engage across two Fortune 100 companies

About Nuveen

- A global investment leader managing \$1.4T in public and private assets
- Part of TIAA, a Fortune 500 financial services company serving non-profit institutions and their employees

Baseline Nuveen internal communications landscape

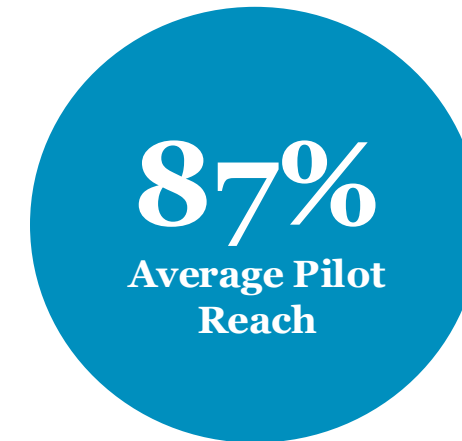
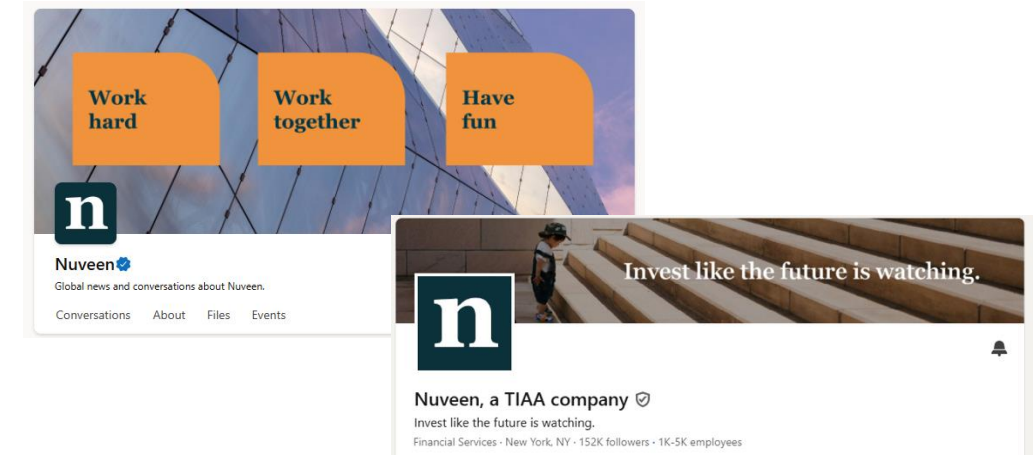


- **Reliant on two global, largely top-down channels** – email and events – to reach all audiences.
- Emails reaching **1,000 or more associates** were only **opened by 51% of their targets** on average in 2022, showing greater immunity to the channel.
- Events enabled only a **small percentage of associates** the ability to ask senior management questions.
- Adding Q&A type events will not help, and were instead **a major contributor to meeting fatigue** when lower-level town halls factored in.

More email and event volume generates less upside for message delivery and demand more resources

Initial actions

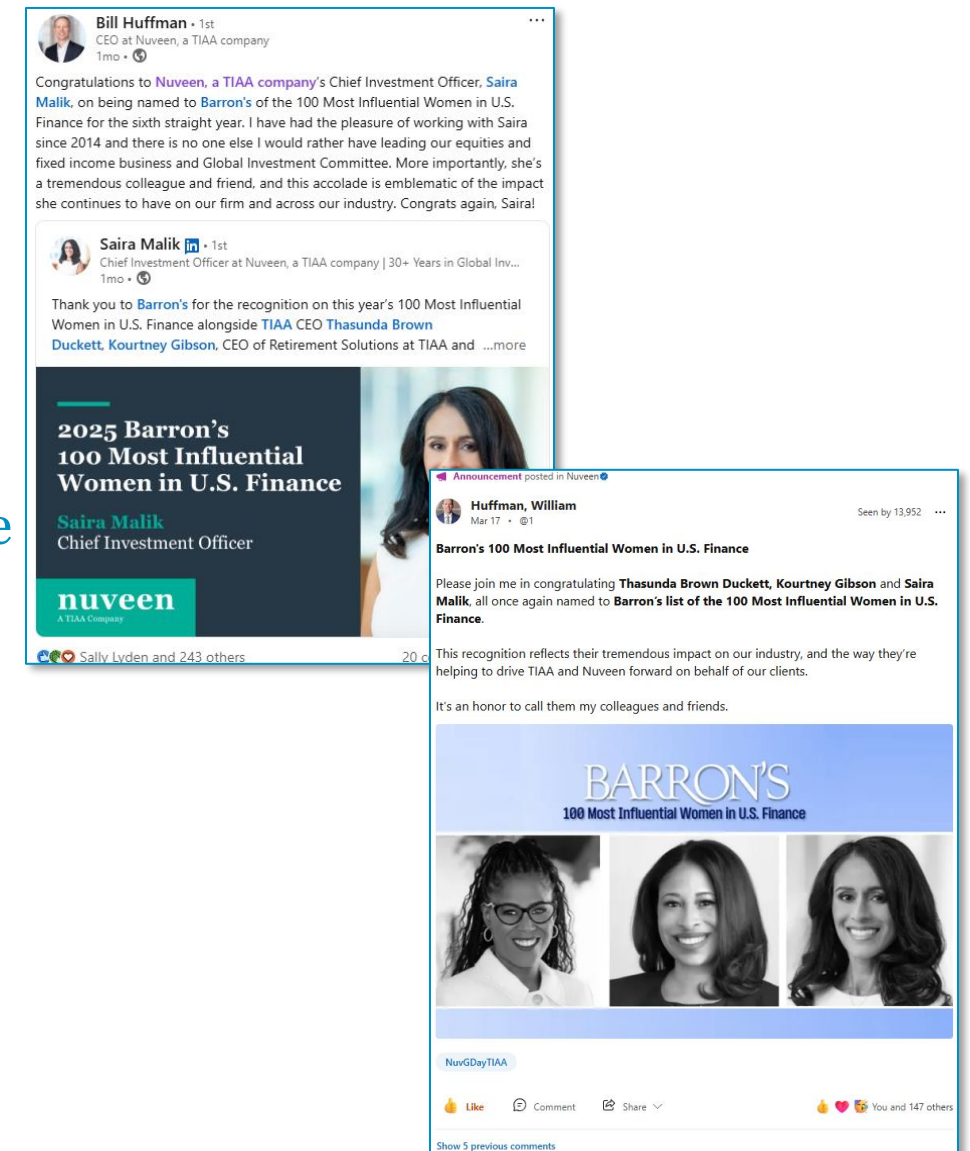
- **Initiated pilot** lower in the organization as a case study for leadership
- Focused on **significant upsides and little downside/no cost** in launching broader group
- Emphasized as internal **counterpart to LinkedIn efforts – not personal, non-business social**
- Leverage **existing leadership and spokesperson LinkedIn posts** as starting point
- Deployed a **proven playbook for engagement**, including kickoff memo from business president ahead of launch to set participation expectation as a new leadership channel.



Modernizing communications for a firm that is now 60%+ Millennial and Gen Z

Day one to two plus years later

- Zero to **4,000 active associates** in first **28** days, with **109,730** read messages and **575** reactions on **55** posts in past **28 days** and leadership posts averaging **86%** reach
- Launched communities for next level down that benefited from **ripple effect** of main community engagement
- Main community launch has driven significant overall growth in the platform, now averaging **similar usage to Teams and Outlook**
- **Awareness** was quick, but **engagement** took time
- Today, main community has logged **2.0M+ impressions, 20k+ reactions, 1,600+ comments** since June 2023 launch
- **2+ emails or less** per month today



Established social-first approach internally and externally

Our Playbook for Engage Adoption



Evaluate readiness



Start small



Hold hands



Send wins up the chain



Play the long game

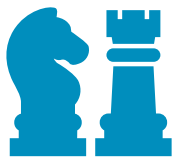
How we operationalize Viva Engage



Leverage editorial calendar to strategically plan communications



Streamline multichannel communications with Amplify.



Work together to plan communications strategically, aligning priorities with leadership levels



Empower non-communicators to take ownership of their communications strategy

10 lessons from 10 years of Yammer/Engage deployments

- Close the gap between **how people communicate** at work and at home...employees will be receptive
- Needs to be **leader-led** to start...lower levels will follow
- Treat **email as a competitor**...never stop making the contrast
- Take the **long view** on adoption...from impressions to engagement
- Connect **comms to the balance sheet**...then it becomes a business imperative on par with other areas
- Leverage the **M365 platform integration**...push the limits
- Build a **comms tech capability**...leaders will want more
- Foster a **CIO alliance** to champion the work...it helps at the leadership table
- Be active with the **Engage product team**...help them connect your needs to technical solutions
- Go from being a **comms order taker**...to someone driving measurable impact on the bottom line

Disclosures

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