

Helen +
Gertrude

Impact Report

2023



Introduction

Letter from Becca

Helen + Gertrude's DNA is rooted in making connections between disparate people, teams, and challenges. Since our inception, our world has faced numerous challenges that have impacted many unfairly, from rights being stripped away from our most vulnerable to a global pandemic, climate catastrophes, and war. These circumstances influenced the way we viewed our creative process and our benchmarks for client performance.

This connects back to our core mission: To create more effective and efficient marketing and advertising through the connection of data, creative, and media. Through the measurement of our content, we better understand the real people at the other end of our campaigns and how they respond to our work.

In 2023, we evolved our brand to focus on making work that means something – for the creators and the consumers. Data is still core to what we do. But we know that it is just one part of the human experience. Human-centered design is incorporated into everything we do, from how we conduct research to how we show up on set and the clients we choose to work with.

This report reflects the heart and soul that went into making a business that is scientifically creative and purposefully human throughout 2023 and will lead us into 2024 and beyond. Within this report, you will find our work speaks for itself, and we've also included data and testimonials to support our claims.

Enjoy,



CEO + Co-Founder



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Company Culture



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Company Culture

Acts of Kindness

We asked our team to share their most memorable moments from throughout the year. Here is how they responded:

"I just want to thank the Client Services team and everyone, really! I've never had a job where I could go on vacation and not have to work through or be buried when I return. Everyone wants everyone else to enjoy themselves the way they would want to, and it's so appreciated."



Danielle Raymo, Account Manager

"I'm constantly impressed by the dedication everyone has to help one another, whether it be internally or volunteering in their local communities."



Molly Leo, New Media Designer

"I think the work Jill has been doing to bond with her copywriters is so admirable. Her team really seems like they care about each other, not just on a work level but on an emotional and personal level. Their team works hard to grow their writing skills, think creatively, bond as teammates, and bring energy to the office. I find it so admirable that Jill cares so deeply, and it shows in the success of her team."



***Tegan Jenner, Senior Data Analyst,
Media + Insights Team Lead***

"Implementing a sensory-friendly day in the office is a huge win for everyone at H+G. I was grateful for how quick Leire and Becca were to welcome the idea."



***Séamus Spencer, Creative Services
Lead, Design***

"We worked on some emotionally weighty projects this year and it's been inspiring to watch my colleagues support each other. And I especially appreciate being able to consult with a trauma-informed therapist (Leire's mom!) who helped ensure we interviewed subjects with sensitivity and care."



***Ashley Mason, Senior Communications
Strategist***

"Ashley Torres remains a shining positive light on all projects I work on with her! She is so fun to collaborate with and brings such good energy to every team. Thank you for the postcard that brightened my whole week!"



MacKenzi Nelson, Art Director



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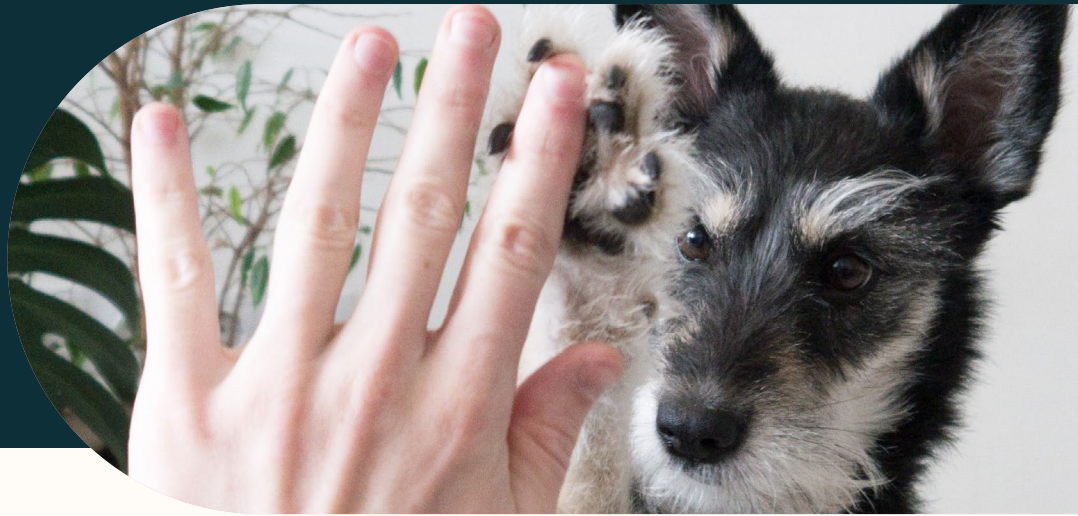
Company Culture

By The Numbers

Ways our team supported acts of kindness this year.

- **\$2,575:** The number of matched employee donations to BIPOC, LGBTQ+, animal, and women-centric non-profits
- **738:** High-five messages of praise and admiration
- **155:** Volunteer hours and in-kind marketing services for Pencils and Paper, United Day of Caring, Edison Career and Technology High School, Grupo Cultural Latinos En Rochester, Ibero-American Action League, and Walking for Rochester
- **32:** Birthdays celebrated

738
High-Fives



155
Volunteer
Hours



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32
Birthdays
Celebrated



Company Culture

Designing a More Inclusive Future

You know us as the team that brought a scientific approach to content creation. While data tells one story, empathy gives us permission to put it into real scenarios that connect with audiences. That's where the real innovation begins.



At Helen + Gertrude, we've spent countless hours engaging in conversations about our culture – critiquing, celebrating, and fine-tuning it to be a better experience for those involved. Our success is not measured by campaign results alone but through the enthusiasm of our team and our customers. Bringing our left and right brains together is still core to who we are, but it was time for the next evolution of what that means and how we are showing up today.

This year, we decided to refresh our brand and infuse a **human-centered design approach** into every facet of our business. What does that mean for a brand refresh for an agency that helps other companies embrace a more human perspective? Well, we “ate our own dog food.”

Through our brand strategy work, we help clients discover their Soul Story by first pinpointing their uncommon denominator – what they uniquely bring to the table. We gathered our key stakeholders for the day, asked the tough questions, and left the workshop with aligned values, mission, and overall purpose; all through the lens of holding ourselves accountable to push the industry towards meaningful experiences across every touchpoint. Our uncommon denominator? Our people and how they interact with each other, our partners, our customers, and the world around them.



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Designing a More Inclusive Future

Picking apart our brand and determining what was still true and what no longer served us was a process that took nearly a year. In our case, the cobbler's shoes experienced some shipping delays.

- We introduced our new tagline to ensure we never lost sight of the human on the other end of the data – Scientifically Creative. Purposefully Human.
- We tweaked our color palette and put it through the wringer on how it shows up for all visual needs.
- We analyzed our typography set to understand what components affected legibility.
- We all got new headshots! This is not a natural experience for most people, so we sent surveys and got to know how and when each of us feel our absolute best so we could craft each session specific to the person being photographed. It was a really special day.
- New swag makes every brand announcement more exciting, and it was important to us to also be purposeful with each item. So we provided a gift that aligned with each of our core values.
- We debated and picked apart our word choices and what they meant, allowing us to refine our voice spectrum to find the perfect balance of our “Sage” and “Creator” archetypes.
- Even our logo got a slight makeover, making it more scalable and giving a nod to our love of numbers with our new “+.”

The response from our customers and the performance of our work have proven that it's all working! We will continue to iterate and refine how we operate internally as a team, the strategies we provide our customers, and how we support our local community. Each piece contributes to our role as a human-centered digital agency.



Company Culture

Becca's Tips for Creating a Human-Centered Workplace



Tip 1

Build equity.

Have open and non-judgmental dialogues to uncover and address systemic prejudices or blind spots.

Tip 2

Celebrate each other.

Validate contributions from others and express gratitude.

Tip 3

Get to know one another beyond the tactical.

We love the DISC assessment as well as coffee or lunch 1:1s to get to know each other better.

Tip 4

Make space.

Consciously pause, ask for other perspectives, and actively listen.

Tip 5

Admit mistakes.

Being vulnerable is key to building strong relationships and shows you're human.

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Company Culture

Community Connection

01

We joined forces with Walking for Rochester in an effort to clean up our beloved city while promoting environmental preservation through hands-on action.



02

Our Creative Services Lead of Production, Amy Sadler, and the team loved volunteering with Pencils and Paper this year to help provide free school supplies to teachers and high schools in need. Their work helps ensure that children have what they need to succeed in the classroom.



03

We were honored to work with the students of Edison Career and Technology High School to recreate the Montessori School of Rochester's logo. Ashely and Hannah are pictured here accepting the Community Champion Award from this fulfilling project.



04

The colorful final logo for the Montessori School of Rochester.



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Company Culture

Impactful Team Building

Team Highlight: Pencils & Paper Volunteering Experience

Pencils + Paper is a local program that provides free supplies to teachers in high-need schools, helping to address the critical educational gap in Rochester and ensuring students have the tools they need to succeed.



Our Client Services team sorted and packed supplies, organized inventory, and learned about the organization's mission. As a more unconventional alternative to a Happy Hour or dinner, this bonding opportunity allowed the team to pitch in on a non-work related project together, catch up outside of the office, and generally "hang out" while directly supporting an important mission.

Here's how volunteering has improved our team:



"It was a lot of fun getting to know the other volunteers there, seeing the space for the first time, and seeing the amount of teachers actually coming in and shopping for their students - really impactful for how necessary an organization like this is."

Danae King, Strategic Account Manager



"This was a great team bonding experience since there's lots of time to chat while you sort. While Pencils & Paper does get lots of new items, it was also awesome to see and learn about businesses like Wegmans, Staples, JoAnn's, and more who donate seasonal or unused items all the time. That makes a huge impact on the planet and community!"

Danielle Raymo, Account Manager



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Professional Development, Made Personal: Our Top Strategies

Get Everyone Together

We have team members located around the country, so finding time to connect (both virtually and in-person) is a priority. We all came together in January for our company's birthday celebration in Rochester and again in July for our [Summer Outing](#) in the Finger Lakes. Aside from these larger meetups several times a year, we also prioritize gathering through our team off-sites, monthly All Hands meetings, holiday celebrations, and more. These gatherings give our teams the chance to connect in a more relaxed, non-office setting, which we've found only strengthens our communication and collaboration during work, too.

Give Back While Connecting

Team bonding + community involvement = some of the most fun and rewarding experiences we've had at the agency! Activities like our trash collections with Walking for Rochester, cleanups through the United Way Day of Caring, and collaborating with the Rochester Artist Collaborative to create a scholarship and hire models have allowed us to bond with coworkers we might not see as often while directly giving back. We'd call that a win-win.

Elevate Your Skills with Training

Keeping up with the latest trends can be a challenge in any industry, but dare we say that digital media might move faster than most? Between the ever-changing guidelines on social platforms, new memes, and the explosion of conversations around AI this past year, there's never a shortage of opportunities to sharpen our skills. We've prioritized finding time for employees not just to keep up-to-date with industry trends, but to stay ahead of the curve actively. In 2023, that looked like the creation of task forces for topics like generative AI and TikTok-first content, team-specific certifications for Meta and other tools, and monthly educational "book clubs.". By allowing team members to choose what topics to explore based on their needs and interests, these trainings allow us to focus on our individual strengths—and then spread the knowledge.



Enviromental Sustainability



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Going the Distance, Virtually: How Remote Workshops are Changing the Way We Travel

Shooting Content, Remotely

Custom content shoots used to mean a full day in our office studio—but the shift to remote work has allowed us to reimagine what's possible when it comes to working with models and clients, near and far.

In 2023, our production team successfully conducted shoots with models virtually, and are continuing to optimize the process for 2024 and beyond. Through some upfront filming “training,” an overview of scripts and background styling, and collaboration tools like CaptureOne Live Sessions and good old iMessage, we’ve found a way to make virtual shoots as seamless as possible.

Aside from the benefits of being able to tap into a larger pool of potential models, remote shoots help us improve efficiency and meet our sustainability goals. Minimizing travel for both models and clients, and letting talent use their own props reduces our overall consumption and eco-footprint.



“Virtual shoots remove any need for travel, for talent and production crew, and allow us to tap into owned wardrobe and props from the talent to avoid shipping of props, lights, etc. We also have virtual options for our remote team and clients to call into shoots to avoid travel onto set.”

**Amy Sadler, Creative
Services Lead, Production**



“[Remote shooting] allows us to collaborate with talent from all over the country, or even the world, making it more accessible. It significantly reduces travel, which is beneficial for sustainability.”

**Luigi Comba,
Cinematographer**



“There was definitely a learning curve in translating how to plan for a shoot that you’re not in the room for and for learning how to give clear direction and set expectations for what we can achieve. I think it’s pushed us to learn how to communicate more effectively and also push past creative limitations.”

**Meg Barrette, Senior
Production Editor**



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Going the Distance, Virtually: How Remote Workshops are Changing the Way We Travel

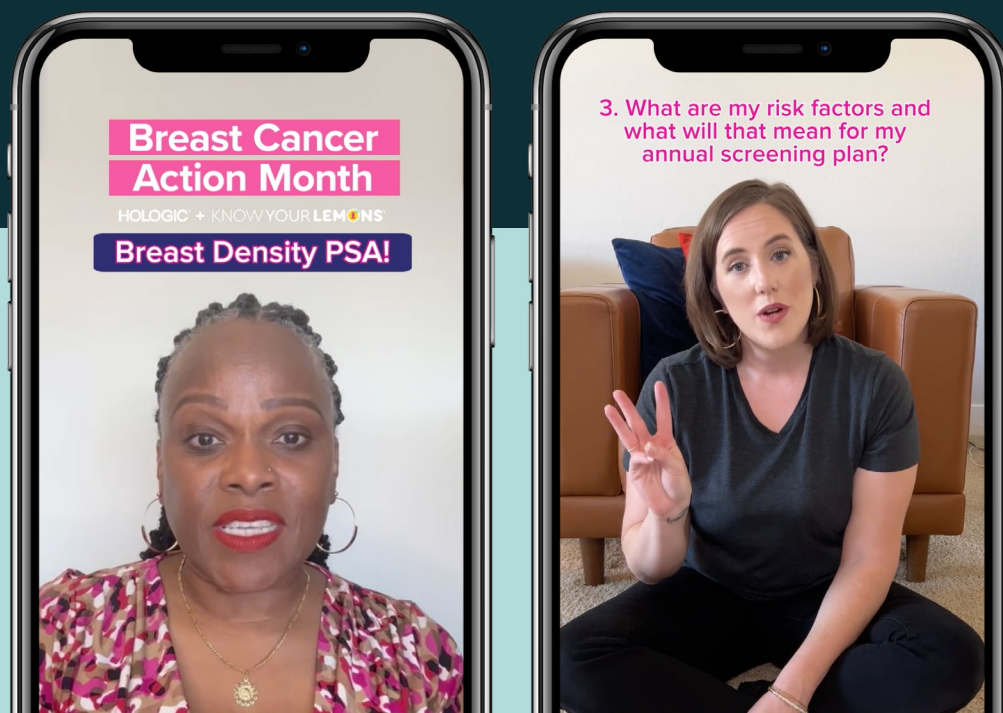
Digital Collaborative Workshops

In addition to client projects, we've been able to conduct several virtual workshops for our team in the last few years. Given we have team members in several states and time zones, remote workshops have allowed us to all come together to learn from each other and outside organizations. From "Fourth Friday" presentations on topics like AI, Content Moderation, and Delivering Feedback, to DEI trainings with local partners, knowledge sharing has become easier than ever with just a click.

Project Highlight: Raising Awareness of Breast Cancer through TikTok

With our client Hologic, we created several custom TikToks to raise awareness of Breast Cancer Awareness Month (BCAM) and the importance of early detection.

Shooting remotely allowed us to work with creators from across the country who had a personal connection to breast cancer, and were able to film themselves sharing their stories in a natural, home setting. Avoiding travel and the need to ship props helped boost efficiency and center authentic stories. In addition to seeking out these creators, our own team member, Séamus, had a meaningful connection to the cause that brought added depth to their work on the campaign. [Read more](#) about the project, and how virtual production helped us gain 4.6M views on our videos!



Ways We Travel Smarter



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Tip 1

Remote Work Works

We were remote-friendly before COVID, but the adoption of 100% remote work during and following the pandemic allowed us to further boost flexibility and cut our overall environmental impact. Zero commute = zero transportation emissions!

Tip 2

It's Cool to Carpool

When our team visits clients within driving distance, we only take one vehicle. Whether it's sharing one of our personal cars to stop in at [Healthy Living Market in Saratoga Springs](#), or renting a large van to hold our team and their equipment on route to [Blue Bears Special Meals](#) in Princeton, NJ, carpooling is an easy way to reduce our carbon footprint—and learn about each other's music taste on the way!

Tip 3

Essential Travel Only

In general, we work to adopt a "remote-first" mentality when it comes to long-distance clients, meaning we encourage in-person visits only when essential. We've been pleasantly surprised by how much can be accomplished before ever meeting face-to-face.

The Sustainability Honor Roll

We believe sustainability is a collaborative effort. That's why we actively seek out and nurture partnerships with like-minded brands who share our vision for building a greener future. Here, we spotlight some of our most fruitful team-ups from the past year that made a positive impact.

"Investing with Impact" Award



Phalanx invests in established and emerging companies in the fields of renewables, waste-to-value wood products, social impact, and renewable energy. We collaborated with their team to develop a new website and presentation templates to help them reach new companies that match their "green" values.



"Most Likely to Match their Reusable Bag to their Outfit" Award

Healthy Living is a family-owned grocery store known for their high ingredient standards, local partnerships, and eco-friendly practices. This year, we worked together to create everything from in-store signage to a robust media plan—and we're just getting started. Their commitment to local communities and purpose-driven mission gets them an A+ in our book when it comes to a sustainable impact. And yes, their customers love a reusable bag!



"Sustainability in Style" Award

Element Design Build prioritizes crafting homes that seamlessly blend luxury styles with a strong commitment to sustainable building practices. Through the development of a new logo and brand guidelines, we helped them communicate their purposeful mission to new and existing clients.



"Hometown Hero" Award

We sponsored the 2023 Climate Solutions Summit, a two-day event centered around building a regenerative economy in the Genesee-Finger Lakes Region of New York.



"Sappy for the Planet" Award

Clean Maple is a Vermont-based skincare company, driven by their passion for maple and belief in the power of nature. Their products are produced through organic, sustainable farming practices and are free from synthetic ingredients and animal testing. We worked together to develop thoughtful social guidelines and launch their brand to the world on social media.



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The Magic of Regenerative Storytelling

Sustainability is a life passion of our Creative Services Lead, Amy Sadler. So, naturally, it's at the heart of her team's processes.

"I'm an amateur gardener and nature lover. So much of my passion goes toward turning my large wooded yard into a thriving and sustainable ecosystem. This includes introducing native plants, encouraging clover to spread into our grassy areas, using electric tools and organic fertilizers, and accepting that our wildlife will (and should!) munch on our plants."



Amy Sadler
Creative Services Lead, Production

While the "Shoot in Progress" sign glows in the studio window, there are so many ways our content is being created regeneratively, with the environment in mind. How exactly does the team accomplish this? Let's dive into what's happening on a typical set:

- We avoid buying and returning props and wardrobes to prevent waste since returned items often get thrown away instead of resold.
- We regularly ask talent to bring wardrobe based on a mood board, so we have guaranteed fitting options.
- Working with local talent means we avoid excessive travel for shoots.
- We use boxed water, refuse plastic silverware with lunch orders, provide plant-based options, and choose snacks with biodegradable packaging while on set. We reuse hard drives for shoot backups.
- We plan shoots involving food and beverage clients around when our office is full of hungry people, so we eat all the leftovers!

Amy's Tips on How to Be More Sustainable at Your Next Shoot + Event



Tip 1

Work sustainability into your creative ideas! It doesn't have to BE the idea, but it can be done through subtle details like showing public transit, talent turning off lights, and biodegradable props.

Tip 2

Be resourceful. Use what you already have and be clever in making small changes to translate props, wardrobe, and sets to different clients.

Tip 3

Have a materials reuse/disposal plan in preproduction and question if each item is necessary.

Tip 4

Master remote access to minimize travel and costs; CaptureOne Live is a game changer!

Tip 5

Build relationships with local organizations that could benefit from production leftovers, transforming waste into community support.

Environmental Sustainability

How We Made Sustainability A Core Pillar of Our Company Culture



Our team loves a friendly competition. And when we kicked off our annual sustainability challenge four years ago, that's exactly how it started. Two teams of trash-talking colleagues went head-to-head, earning points for everyday green actions like bypassing plastic bottles, composting food scraps, and taking 4-minute showers.

The stakes? Bragging rights for an entire year—and a gift card to a local eco-friendly business. But what seemed like a simple little contest initially sparked nothing short of a full-blown green revolution in our office.

That's because meticulously tracking single-use plastic consumption or local farmer's market visits was like ripping off a blindfold. Suddenly, we could see the impact of our daily decisions, and once that screen of blissful ignorance was removed, there was no going back. The month-long event left us hungry for more when August arrived.

So we got scrappy. We started incorporating sustainable practices into everything we did. Composting bins for food waste? You got it. Meeting up at Rochester's iconic Public Market, a massive green market right next to our office, instead of corporate coffee chains? Why the heck not! Before we knew it, being green had seamlessly woven itself into our everyday rituals and routines.

These days, environmental stewardship is simply hard-wired into our company DNA. Whether we're sourcing catering from plant-based local businesses for company events or bonding over mouth-watering veggie dishes at team potlucks (sharing recipes is highly encouraged!), sustainability guides our decisions.



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How We Made Sustainability A Core Pillar of Our Company Culture

Our commitment to sustainability extends far beyond the office walls. Our virtual “buy nothing” group lets employees pass along gently used items to others in our community instead of trashing them. We also regularly host clothing exchanges, creating a fun environment for colleagues to swap wardrobes. Not only does it keep clothes out of landfills, but it’s a total blast bonding with colleagues over new-to-us pieces.

Even our employee thank-you gifts reflect our shared values, often a gift card to a local business we think they will love. For example, when we wanted to recognize our rock star teammate recently, we hooked her up with a gift card to her favorite local plant nursery.

This year, we took it to the next level and gave Helen + Gertrude swag for our rebrand (more on page 7) the eco-friendly treatment. We decked ourselves out in branded merch that reflects our shared values—from lilac-colored reusable totes (a subtle nod to our city’s legendary Lilac Festival) to slick notebooks we can’t get enough of for unplugged meetings and IRL brainstorming.

As we see it, being a sustainable business isn’t just something we reserve for special committees; it’s who we are. We’re proud to be that “green voice” unafraid to speak up and have honest conversations about making this planet better. And it resonates. Like-minded clients who share our environmental passion are naturally drawn to our vibe.

Ultimately, our proposition goes way beyond great creative work (though, of course, we’ve got that covered, too!). It’s about joining forces with partners that truly and holistically care about the future of this Earth we call home.



Social + Community Impact



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Social + Community Impact

Designing the Future: Reenvisioning a Logo with the Next Gen of Creatives



Our design team joined forces with the bright minds of **Edison Career and Technology High School** students to breathe new life into the Montessori School of Rochester's visual identity.

This collaboration goes deeper than logo design as we helped empower the next generation of designers while infusing their fresh perspectives into the very essence of the Montessori School of Rochester. The team focused on mentorship during this project, really guiding and modeling the student's ideas into a logo that symbolizes the vibrant essence and values of their institution. This logo project not only sparked enthusiasm among design-oriented students but also immersed them in real-world scenarios, guiding them through critiques and supporting them in refining their designs as our team led the way.

While on this journey our Art Director MacKenzi Nelson recognized the importance of high school students encountering real-world career scenarios early on, emphasizing how this experience aimed to equip and invigorate them for their design careers.

"High school students aren't often exposed to real-life career scenarios until college," she said. "I hope this experience better prepared them and excited them for their next steps with their design career, and helped them further know if it's what they want to pursue. Students (and all people really), feel valued when others are invested in their success. This is what I feel we've brought to this experience, and our mentorship style can hopefully be passed on to others in their life."



MacKenzi Nelson
Art Director



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Designing the Future: Reenvisioning a Logo with the Next Gen of Creatives

This project exemplifies the profound impact that seemingly small initiatives can have on the community, showcasing how even modest endeavors can yield significant results. The students not only had the opportunity to collaborate with mentors at a young age, but this project also enabled the Montessori School of Rochester to commemorate the creation of a dynamic new logo, set to ignite inspiration within both their internal and external community.

"I wish I had mentorship like this when I was their age," Noah added. "I think that can make a big difference in someone's path and what they want to do in life."



Noah Kay
Senior New Media Designer



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Social + Community Impact

On Set at Blue Bears

The Blue Bears Special Meals is a restaurant dedicated to providing meaningful employment to individuals with intellectual and developmental disabilities (IDD). Nine out of ten people with intellectual and developmental disability lack meaningful employment. Through partnering with them for a video production, we aimed to bring more awareness to their mission to change that.

01

Chef Andrews cooking up some delicious meals with his partner Emmanuel.

02

Rolling out some hand-made pasta never looked so good.

03

Chef Andrews whipped up this specialty pasta dish for our shoot. Our team was lucky to give it a taste test and was deemed delicious!

04

"Quiet on set." "Yes, Chef!" Videographer Luigi and the team get some close up shots of Chef Andrews.

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Social + Community Impact

Luigi and Autumn's Tips for Capturing The Sights and Sounds



Tip 1

Take pre-production seriously.

Have an outline of basic shots you know you need to get.

Tip 2

Be Flexible.

Stay open to when plans change or inspiration sparks on location.

Tip 3

Be patient.

Interviewees may ramble, not want to talk to you, or get emotional while speaking. Treat it as a conversation with a friend and not an obligation or transaction.

Tip 4

Capture your surroundings.

Remember to capture more than just the visuals. Try focusing on sounds and routines that will help add more depth to your project.

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Breast Cancer Awareness in Motion

Genius 3D mammography focuses on spreading breast cancer awareness to women of all ages, ethnicities and backgrounds, centered around the message of early screening and detection. This year's Breast Cancer Awareness Month (BCAM) campaign relied heavily on a strategy hinged on the insight that consumers spend more time on video now than ever before. Our media specialists, Abbey Greendyke and Katie Drake, implemented a thoughtful targeting strategy and proven tactics to make a big impact — an impact that reached 43.4M people with our important message to get screened.

When we work on a project like this, it can feel daunting to relay such an important message to millions of people around the world. However, we had a plan from the start. Focusing on a video-first strategy, the team knew they wanted to utilize platforms that would feel native to view a video ad in, such as Youtube or CTV. Katie realized that this spike in video messaging connected directly to the boom of platforms like TikTok.

"I think the movement of users towards platforms such as TikTok where the only ad format is video backs up the ideas that users are transitioning towards video being the primary way of viewing content."



Katie Drake
Media Strategist

Besides focusing on a video-first strategy, the team also had to determine what audience would be best to push this messaging out to. In order for the campaign to have maximum impact, the team decided sticking to a broader audience would be beneficial. "We tried not to narrow the target audience too much for this campaign," Katie said. "It is a really important topic so we wanted to keep it fairly broad and target women in the age groups where breast cancer awareness is important."



Breast Cancer Awareness in Motion

Although we had a solid game plan, no project goes on without a few hurdles to jump along the way. The team realized not only were there tracking issues initially on TikTok, but also privacy limitations when it came to the client's website.

"The biggest hurdles we faced had to do with privacy limitations on the client's website. They recently introduced a strict cookie policy that made tracking increasingly difficult."



Abbey Greendyke
Media + Insights Lead

Considering those hurdles, the team worked harder than ever to make sure this campaign was a roaring success. We also had evidence that the ads were resonating with our audience as the number of people that searched on the site for a provider near them increased.

Abbey Greendyke reflected on these big wins for the campaign, "Being able to run a larger scale CTV campaign was super fun. The campaign was able to drive significant on-site action with their facility finder as well, despite users having to click through multiple landing pages to take that action - proving the engagement and success of the campaign!"

Along with the campaign success there was also a huge sense of personal success among the team. It was exciting to be a part of such a big campaign that directly impacts the health of women for the better. "I love being able to work on impactful projects like this. It makes me feel like the work I do is making a difference and helping people," Katie said.

Social + Community Impact

Social Impact By The Numbers

Ways our team supported acts of kindness this year.

- **155 Hours** spent volunteering
- **1,674 Hours** spent training
- **\$2,575** donated and matched
- **\$15,000** estimated value of pro-bono work
- **More than \$7,800** was spent supporting local, small, BIPOC, LGBTQIA+, and Women-owned businesses for prop sourcing.
- **10** non-profit organizations partnered with

\$15,000
Estimated value
pro-bono work



\$2,575
Donated and matched



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\$7,800
Impactful props
sourced



Business Ethics



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Business Ethics

Taking Care of Our People: Our Not-So-Secret Sauce to Workplace Happiness



Building a human-centered business and brand requires work inside and out. Taking care of our employees means they will be more capable of taking care of our customers. It's just good business. In addition to creating more empathy by getting to know each person's working style through DISC assessments we also made a significant effort to support our team members in the physical world as well.

A Hybrid Workspace For Our Humans and Community

Nearly 55% of Helen + Gertrude's staff worked remotely full-time from over 5 states in 2023. Though some who grew up locally opt to move to larger metros, urban expats have been drawn to Rochester's family-friendly lifestyle while keeping big-city career opportunities. Those local to Rochester have the flexibility to work from home or come into the office for highly creative collaborative work.

The rise of distributed teams allowed us to downsize and redesign our physical footprint to both reduce costs and boost community impact. The flexible model allowed Helen + Gertrude to downsize its physical footprint by about 32% - saving approximately \$30,000 annually on space and amenities.

The resulting office environment functions as a collaboration hub for our hybrid teams, while also opening up new ways to benefit partners, like our neighbor 540 West Main, who needed temporary desk space. We also bring teams together regularly for retreats, brainstorming, and bonding at our main office. This maintains the energy and "creative collision" that sparks innovation.

There's a common misconception that only the extroverts like coming into the office. We found employees preferred coming into the office occasionally for many different reasons. For some, it was to escape at-home distractions; for others, maybe just a change of scenery to spark creativity was needed. Our team members provided feedback loud and clear that our space could be more conducive to more than just face time and social interaction. In 2023, we introduced Sensory-Friendly Tuesdays. A day with minimized distractions included dimming lights, reducing loud conversations in the open desk area, and prompting team members to listen to music on their headphones rather than the over-office speaker.



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Taking Care of Our People: Our Not-So-Secret Sauce to Workplace Happiness

Happiness By The Numbers

A quality benefits program is a valuable part of the employment journey. At Helen + Gertrude we've collected employee feedback to ensure the total rewards package is meeting the needs of our employees.

Of our company communications, **89% of employees** find the monthly All Hands meetings as very valuable.

89%

A 401k plan with matching and Flex Fridays were the most important non-standard perks according to **76% of employees**.

76%

Nearly **70% of employees** rated our medical plans as excellent to above average.

70%



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Our Unsung Heros

This behind-the-scenes crew makes sure our agency runs smoothly and safely.



Certified Women-Owned Business through WBENC

WBENC Certification is the most widely recognized and respected national certification for women-owned businesses in the U.S. The organization validates that a business is at least 51 percent owned, controlled, operated, and managed by a woman or women. Businesses must undergo a thorough vetting process, including a review of business documentation and a site visit.



DEI Workplace Training with 540 WMain

540WMain, Inc. serves as a virtual antiracist education platform. Through their organizational services, they have supported Helen + Gertrude by educating our team to create a more equitable workplace.



Human Resource Guidance and Support with HR Works

As an extension of our leadership team, HR Works supports Helen + Gertrude in ensuring all federal and state compliance needs are met, our employees receive equitable pay, and offer various management training for team members.



Cyber Security and Tech Support through IT Insights

Introduced to the team in 2023, IT Insights joins our support network to alleviate technical questions and issues from our leadership team, but most importantly ensures our systems are secure and stable



Mike Garsin of Garsin Consulting

As part owner of Helen + Gertrude, Mike is available to offer strategic business advice to our leadership team. Mike supports in weighing the pros and cons of long-term business decisions and offers invaluable wisdom from his years of experience.



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The Power of Simplicity: Our Quest for a User-Centric Dashboard

Just like the nutrition facts on the back of our oat milk, transparency is the powerhouse that keeps everything in check. We won't promise you a rollercoaster of drama, but we will promise a drama-free environment with your campaign performance. Our Media + Insights Lead Tegan Jenner tells us all about how we redesigned our Google Data Studio (GDS) dashboards with a focus on data and transparency—the backbone of everything we do.

Transparency is a core value of H+G, extending to our performance data. We've been providing dashboards with performance data for years as a way of letting clients peek behind the curtain at will, allowing them to check on performance outside of predetermined reporting periods. But we came to realize that providing data wasn't enough. Without narrowing the data focus, adding context, and pulling insights, providing less data-savvy users with heaps of data in a dashboard would be like gifting you a novel in a language you don't read; you're not going to understand the (data) story.

As a company that prides itself on bringing together creative-first thinkers (our "Helens") with data-first thinkers (our "Gertrudes"), we know a professional team is going to have a spectrum of comfort levels when it comes to working with data. When it came time to revamp our performance dashboards to match our H+G rebrand, we decided to dive deep and evaluate not only the look of our dashboards but their functionality, accessibility, and data digestibility, too.

To kick off our dashboard overhaul, we started by chatting with a sample of our creative team to hear their opinion on the strengths and weaknesses of our current dashboards. We also chatted with some client services teammates to see what clients thought of the dashboards. Two things became clear: 1) our original, densely packed dashboards were intimidating, and 2) people didn't know what to do with the data in front of them.

Wine marketing	13	6,343	\$197.31	446	7.03%
alcohol marketing	9	4,223	\$197.31	318	7.53%
Beauty industry marketing	3	2,536	\$154.91	173	6.82%
Skincare product advertising	8	1,785	\$233.61	121	6.78%
Beauty advertising agency	6	1,742	\$283.48	165	9.47%
Wine industry	3	1,490	\$236.14	143	9.54%
Grand total	97	34,751	\$238.55	2,931	8.43%



Insight Notes + Caveats

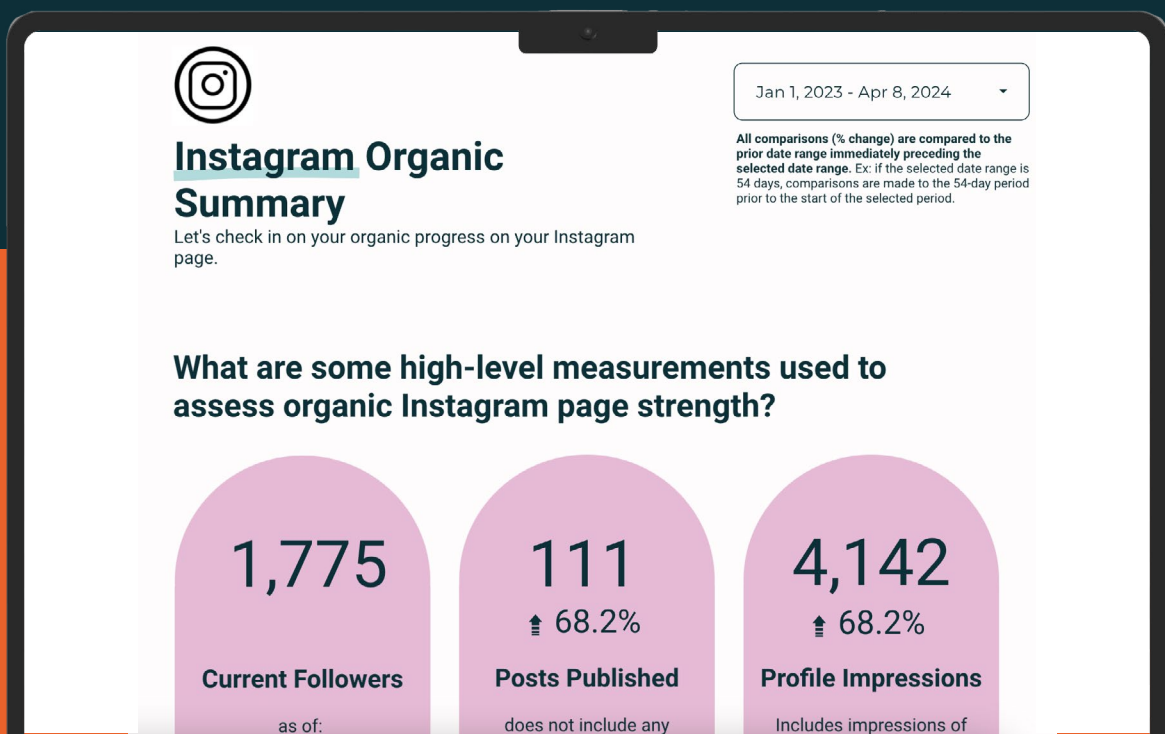
Keywords are driving efficient performance with overall cost per conversion here being \$27. This shows we are continuing to bid on the correct terms and reaching our desired audience.

The Power of Simplicity: Our Quest for a User-Centric Dashboard

We worked with our Art Director, MacKenzi Nelson, to create a revamped dashboard layout that gave the data room to breathe while adding thoughtful visual touches to help make the data easier to interpret. With this new creative touch, conditional color formatting indicates when you're meeting or exceeding a performance benchmark. Accessibility was another priority. We increased font sizes, used stronger color contrast for readability, and implemented a scroll-style page layout for a more mobile-friendly user experience.

Now that the dashboard is fully branded, visually appealing, and everyone can use it, how did we ensure everyone can understand it? We added leading questions above each graph to give context on what types of questions could be answered using the data below (ex: "Which keywords are driving the most traffic on search?" above a graph showing performance by keyword). Most importantly, we added blurbs below each set of graphs with insights and contextual callouts provided by the Helen + Gertrude media team, highlighting the biggest takeaway from each data visualization.

With this transformation, we kicked our performance transparency process up several notches. We've pushed ourselves beyond delivering a cleaned-up, dusted-off version of our client's dashboards, instead refining and molding it into something elegant and usable.



Tegan's Tips for Creating a Thoughtful Report



Tip 1

Data is only as good as the insights you can pull from it. A sexy, sleek graph may look impressive in a deck, but if you can't interpret the data, it's not helpful.

Tip 2

Know your audience. This helps you cater your jargon, level of detail, takeaways, and action items so that your report is as relevant and understandable as possible.

Tip 3

Utilize report layout to increase digestibility. Sometimes, stylistic choices like bold-facing critical text, adding summary headlines, highlighting data points, etc., can make a huge difference when it comes to helping readers absorb the information within a report.

Tip 4

When it comes to wrapping up a report, ask yourself if you've answered the big "so what?" questions. Ex: So what does this mean for our strategy? So what does this mean in terms of benchmarks? So what should we do next?

Measurement and Goals



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Measurement and Goals

Moving Forward Together: What's Ahead in 2024

As we reflect on our first year crafting this impact report, we've been amazed by the breadth of our team's contributions and the impactful partnerships we've formed with our clients. Looking ahead, our focus remains steadfast on nurturing our people, caring for our planet, and continuing to create work that truly matters.

Here are our areas of focus for the next 12 months.

Use our voice for advocacy

Continue hosting regular, multifaceted training sessions to empower employees and clients with knowledge on combating greenwashing, addressing issues of white supremacy in marketing, and promoting ethical communication practices.

Reinstate and strengthen the Diversity, Equity, Inclusion, and Accessibility (DEIA) resource committee

Create a task force for employees from all backgrounds to support us in ensuring equitable and accessible practices in all aspects of agency operations, especially client work.

Continue to invest in ongoing employee development

Provide opportunities for employees to expand their expertise, stay updated on industry trends, and advance their careers, contributing to the agency's growth and innovation.

Promote healthy work-life balance

Identify and address roadblocks and inefficiencies that hinder productivity and collaboration, promoting stable working hours and enhancing the quality of work produced.

Remain dedicated to supporting organizations in our region

Continue the agency's contributions to the community through in-kind work, volunteering, and monetary donations that align with our organizational values.



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Measurement and Goals

Our Commitments:

Our Culture Is Built By People Who Care

Like our work, we also operate our business around human-centered design principles, treating each other, our clients, and our partners with kindness, empathy, accountability, and respect.

We believe in beautiful work, but more importantly in effective work. Creative for creative's sake is, after all, a waste of your advertising dollars.

The motivation behind our team, purposeful partnerships, and quality work is shown through significant results. Together, we hold ourselves accountable by constantly questioning and challenging the environment around us, and grow by making work that means something.



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