

Jad Campbell

AI GTM Strategy | Financial Services | Enterprise AI Deployment | Innovation Architecture | Data Strategy

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Professional Summary

I sit at the intersection of field, product, and research — connecting the world's largest financial institutions to transformative AI strategy, and building the innovation architecture that moves them from market diagnosis to pilot to production. At Salesforce, built the Financial Services AI GTM motion from the ground up: packaging Agentforce and Data Cloud into adoption-ready industry plays, designing the pilot and data governance frameworks that govern POC-to-production transitions in regulated enterprises, and brokering the joint venture structures that give premier institutions early access to pre-market AI capability while generating the real-world data that sharpens what gets built next.

Invented PRISM — now Salesforce's official AI use case prioritization framework across all industry GTM. Designed the Account Planning methodology now embedded in global Salesforce onboarding and published across nine Trailhead Trails. FY26: \$92M+ in direct ACV growth and \$150M+ ACV influenced.

Operates a fully integrated multi-agent system with defined handoffs across research, synthesis, strategic drafting, and QA. Does not advise clients on AI adoption from the outside. Lives it.

Selected Impact Highlights

- **\$92M+ direct ACV / \$150M+ influenced:** Generated in FY26 through enterprise AI programs for global financial institutions, exceeding targets across large-scale AI and data deployments.
- **\$64M TCV deal:** Closed with a Top 3 global bank by aligning data governance, regulatory requirements, multi-stakeholder procurement, and production-readiness planning for enterprise AI rollout. Beat Microsoft.

- **\$70M advisory practice:** Built and scaled from zero in 18 months under full P&L ownership, growing to 60+ practitioners and establishing the Innovation Architecture methodology now standard across Salesforce Financial Services GTM.
- **PRISM framework:** Invented the composite AI use case prioritization framework now adopted as the official approach across all Salesforce industry GTM.
- **Org-wide infrastructure:** Designed the Account Planning process, methodology, and data standards now embedded across Salesforce's entire global sales organization and published across nine Trailhead Trails.
- **\$54B brand launch:** Directed the launch of Evernorth at Cigna, consolidating 150+ brands, building a 1,500-person global COE across 5 continents, in under 7 months inside a Fortune 15 regulated enterprise.

Professional Experience

SALESFORCE 2021 - Present

Managing Director, GTM and Growth, Financial Services 2023 - Present

A three-directional role operating simultaneously across field, product, and research. Field-facing: building the enterprise AI GTM motion for Financial Services, running executive deal cycles, and closing the largest engagements. Product-facing: contributing real-world adoption data and customer insight directly to Agentforce and Financial Services Cloud roadmap teams. Research-facing: identifying, brokering, and co-architecting joint venture structures connecting top-tier financial institutions to pre-market AI innovation, feeding resulting usage data back to Salesforce AI Research.

Performance

FY24: \$42M Professional Services ACV — 110% attainment

MFY25: \$86M Professional Services ACV — 140% attainment

FY26 — within a single fiscal year

Revenue: \$92M+ direct ACV growth | \$29M NNAOV Agentforce | \$150M+ ACV influenced | \$64M TCV largest deal, Top 3 global bank (\$28M NNAOV)

Activity: 200+ SVP+ customer meetings | 14 Strategic Innovation Center workshops | 6 thought leadership pieces | 40+ hours user research

- **Field:** Designed Salesforce's org-wide Account Planning process, methodology, template, workshop, and data standards — a foundational GTM infrastructure now embedded across the entire global sales organization and published across nine Trailhead Trails.
- **Field:** Packaged Agentforce and Data Cloud into Financial Services-specific industry plays: use case suites, KPI trees, and data foundation roadmaps calibrated for banking, wealth management, insurance, and regulated verticals.
- **Field:** Closed a \$64M TCV deal (\$28M NNAOV) with a Top 3 global bank, navigating multi-stakeholder procurement, regulatory compliance, and a multi-year data governance and adoption sequencing plan.

- **Field:** Led 14 Strategic Customer Innovation Center workshops, translating frontier AI capability into board-level business cases and structured pilot programs with defined data milestones and production pathways.
- **Field:** Ran 200+ SVP-level meetings in a single fiscal year, building advisory-grade relationships with CIOs, COOs, and CDOs at the world's largest financial institutions.
- **Field:** Invented PRISM, a composite AI use case prioritization framework now adopted as the official approach across all Salesforce industry GTM.
- **Product:** Contributed real-world adoption patterns, enterprise data requirements, and deployment friction insights directly to Agentforce and Financial Services Cloud product teams, shaping roadmap prioritization.
- **Research:** Brokered and co-architected joint venture structures governing data sharing, IP, and co-development between premier financial institutions and Salesforce AI Research, generating pre-market usage data for model improvement.
- **AI-Native:** Designed and operates a fully integrated multi-agent system with defined handoffs across research ingestion, market analysis, synthesis, drafting, and QA — the operating model advocated for with clients.

Founder, Experience Strategy Group 2021 – 2023

Founded and scaled a design-led advisory practice converting business strategy and qualitative research into adoption-ready AI innovation architecture for Financial Services clients. Developed a proprietary methodology governing how institutions move from market diagnosis through pilot design to phased production, building user delight, progressive business growth, and a durable data foundation at each stage.

Scale: \$70M annual revenue | 18 months | 60+ practitioners | Full P&L ownership

- Developed the Innovation Architecture methodology: business and market position analysis, pilot program design, sequenced experience delivery, and data foundation architecture enabling enterprise-scale implementation.
- Structured joint pilot agreements for Banking and Wealth Management clients, defining data governance, success metrics, and production readiness criteria before deployment began.
- Grew practice from zero to \$70M in 18 months under full P&L ownership; managed hiring, pricing, delivery, and strategic partnership relationships across Financial Services clients.
- Infused practice methodology into the GTM and Growth organization, making Innovation Architecture the standard operating framework for Salesforce Financial Services field teams.

CIGNA GROUP 2019 – 2021

Global Brand Strategy Officer 2019 – 2021

Led one of the most complex regulated-industry brand transformation programs in recent corporate history. Conceived and launched Evernorth, a \$54B health services enterprise, consolidating 150+ global brands into a coherent portfolio architecture in under 7 months, while building the Global Brand COE governing migration across 5 continents. This was not a brand refresh. It was a full organizational, data, and governance transformation executed at the speed of a startup inside a Fortune 15 company.

Scale: \$54B market cap at launch | 150+ global brands consolidated | 1,500-person Brand COE across 5 continents | Under 7 months conception to launch

- Conceived, named, and launched Evernorth, a \$54B health services brand, in under 7 months, requiring alignment across legal, compliance, communications, product, and C-suite in a deeply regulated, globally distributed enterprise.
- Consolidated and restructured 150+ global brands into a coherent architecture, rationalizing sub-brands, retiring legacy identities, and establishing data governance and measurement infrastructure at portfolio scale.
- Built Cigna's Global Brand COE from zero to 1,500 people across 5 continents, establishing governance models, cross-BU operating rhythms, and data-driven measurement frameworks.
- Executed portfolio migration across 30+ regulated business units spanning health insurance, pharmacy benefits, and behavioral health under strict regulatory and public disclosure constraints.
- Supported \$100M+ integrated campaigns connecting regulated-industry brand positioning to measurable business outcomes.

SLALOM 2016 – 2019

Partner; Practice Area Director, Strategy and Design 2016 – 2019

Co-founded the St. Louis office, scaling from 15 to 350+ consultants in three years. Built the Experience Strategy and Design practice, growing pipeline to \$200M+, and integrated Org Effectiveness and Change Management with Strategy and Design to create a differentiated capability addressing both transformation architecture and human adoption.

Scale: 15 to 350+ headcount in 3 years | \$200M+ pipeline built | Adobe Strategy Partner of the Year 2018

- Co-founded the St. Louis market, one of Slalom's fastest regional launches, scaling to 350+ across strategy, design, technology, and change management disciplines.
- Built the Experience Strategy and Design practice from zero, growing pipeline to \$200M+ and leading the firm's largest single design engagement.
- Integrated Org Effectiveness and Change with Strategy and Design, creating a model pairing innovation architecture with human adoption frameworks that make enterprise change durable.

MANIFEST 2014 – 2016

Group Director, Design 2014 – 2016

- Led 40 creatives and strategists across six national offices; ran the Innovation Design team for Lenovo North America.
- Built new digital products, orchestrated merger integration, and directed data-informed creative strategy across national brand clients.
- CMA Project of the Year, 2017.

SWITCH / FLEISHMANN-HILLARD Pre-2014

Group Director, Interactive; Art Director Pre-2014

- Recruited by Fleishmann-Hillard as an Art Director before completing degree requirements — an early signal of strategic and creative capability recognized by one of the world's leading advertising holding companies.
- Built and led the interactive practice at Switch. Event Marketer Top 50 Agency (2013–15). Gold AAF Addy, Digital (2012).

AI-Native Operating Model

Does not position AI adoption as a future state. Operates inside it. The executive workflow runs on a fully integrated multi-agent system with defined handoffs across research ingestion, market and competitive analysis, qualitative synthesis, strategic drafting, and output QA. Each agent operates within a governed workflow; outputs route between agents based on task type and confidence thresholds before reaching human review.

- Built and manages a purpose-designed agent fleet that accelerates research-to-insight cycles, maintains a continuously updated competitive and market data layer, and produces first-pass strategic materials for executive refinement.
- Uses this infrastructure as the operating model advocated for with enterprise clients, providing practitioner-level credibility when advising on agentic AI adoption, workflow redesign, and data pipeline architecture in regulated environments.
- Routes observations from this system back to Salesforce AI Research as real-world usage data, closing the loop between field deployment and model development.

Recognition

Strategist of the Year | Salesforce, FY25

Adobe Strategy Partner of the Year | Slalom, 2018

#1 Best Place to Work, STL Business Journal | Slalom, 2016–19

CMA Project of the Year | Manifest, 2017

Event Marketer Top 50 Agency | Switch, 2013–15

Gold AAF Addy, Digital | Switch, 2012

Education & Professional Development

AI Implications for Business Strategy: MIT Sloan + CSAIL, 2025

LEAD: Corporate Innovation Certificate: Stanford GSB, 2024

Design Strategy Certificate: IDEO U, 2023
Certified SAFe LPM: Scaled Agile, 2018
Certified Futurist, Strategic Foresight: Kedge, 2018
Certified Change Practitioner: Prosci, 2017

BFA Graphic Design, Webster University | BFA Sculpture, Washington University (104 combined credits)
Left to accept an Art Director role at IPG/Omnicom prior to completing degree requirements.

Core Competencies

AI GTM Strategy: Enterprise plays, field enablement, pilot-to-production
Innovation Architecture: Market diagnosis, pilot design, data foundation sequencing
Financial Services: Banking, wealth management, insurance, regulated verticals
Joint Venture Brokerage: Identify, broker, co-architect: pre-market AI access
Data Strategy: Data governance, foundation roadmaps, usage insight design
Product and Roadmap Influence: Field data to Agentforce and FSC roadmap contribution
Executive Advisory: C-suite engagement, SVP+ relationships, deal strategy
Agentic AI Operations: Multi-agent system design, workflow automation, handoffs
Enterprise AI Deployment: POC, governance, adoption frameworks, regulated rollout
Practice and P&L Leadership: \$70M in 18 months, full ownership, team scaling

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