

# Navigo

MARKETING

# Executive Summary

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The Amazon Beauty & Personal Care category showed strong momentum in Q1 2025, with sponsorship activity up 8.7% and organic visibility down 1.3%, reinforcing the shift toward paid media. Top performers like Nutrafol (+2.4% share) and La Roche-Posay (+2.2%) gained ground through focused advertising and dermatologist-backed positioning, while CeraVe held onto the top spot in skincare. High-performing hero SKUs—like Nutrafol’s supplements and Clean Skin Club’s Clean Towels—drove a disproportionate share of sales, validating product-led strategies.

Emerging brands such as Medicube (+3.2% share), SimplyVital, and Wonderskin broke through with tight SKU assortments and efficient ad investments. Across the board, brands that led with conversion-ready content and precise keyword targeting saw stronger ROAS and visibility. With tariff changes on the horizon and Prime Day planning underway, Q2 will favor brands that stay agile and prioritize hero-product promotion backed by well-structured media.

# Why Partner With Navigo?

We Drive Growth for Beauty Brands on Amazon

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- **Amazon Experts in Beauty** – We focus exclusively on beauty brands, ensuring deep category knowledge and proven success strategies.
- **Data-Driven Decisions** – We leverage advanced analytics to optimize performance, improve ROI, and uncover market opportunities.
- **Advertising That Works** – Our paid media strategies deliver higher conversion rates and increased market share.
- **Content That Converts** – We enhance product pages, imagery, and A+ content to drive visibility and boost sales.
- **Proactive Brand Protection** – We monitor pricing, unauthorized resellers, and brand reputation to maintain control of your presence.

# Table of Contents

Beauty & Personal Care.....5

Fragrance.....10

Skincare.....15

Hair Care.....20

Makeup.....25

Key Takeaways .....30



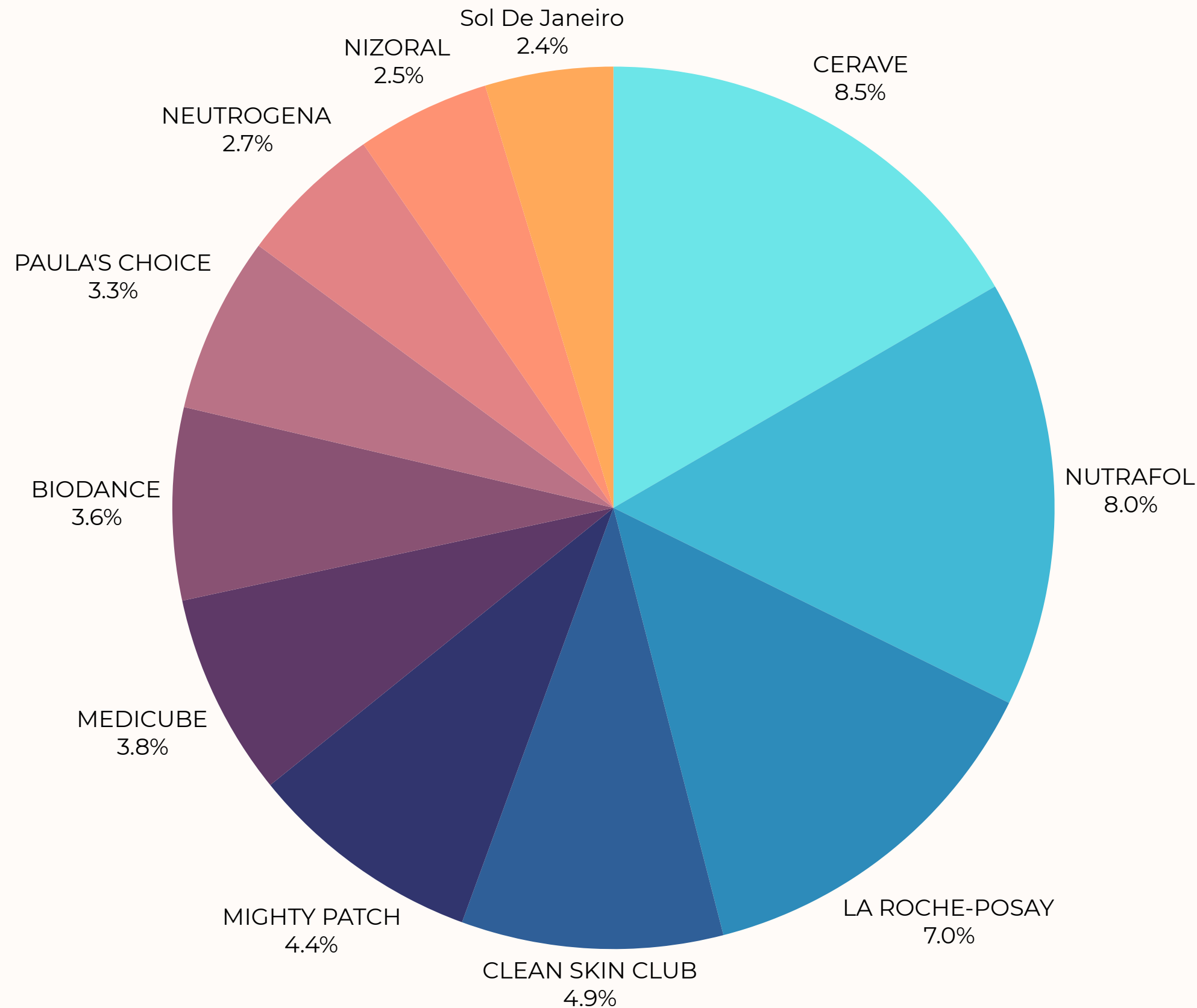
# Beauty & Personal Care Overview

Top brands, items and performance  
in the Beauty category for Q1 2025



# Category Share of Sales

## Top Brands In Beauty



- Top brands in the category accounted for 48.6% of total sales.

- Top Gainers:

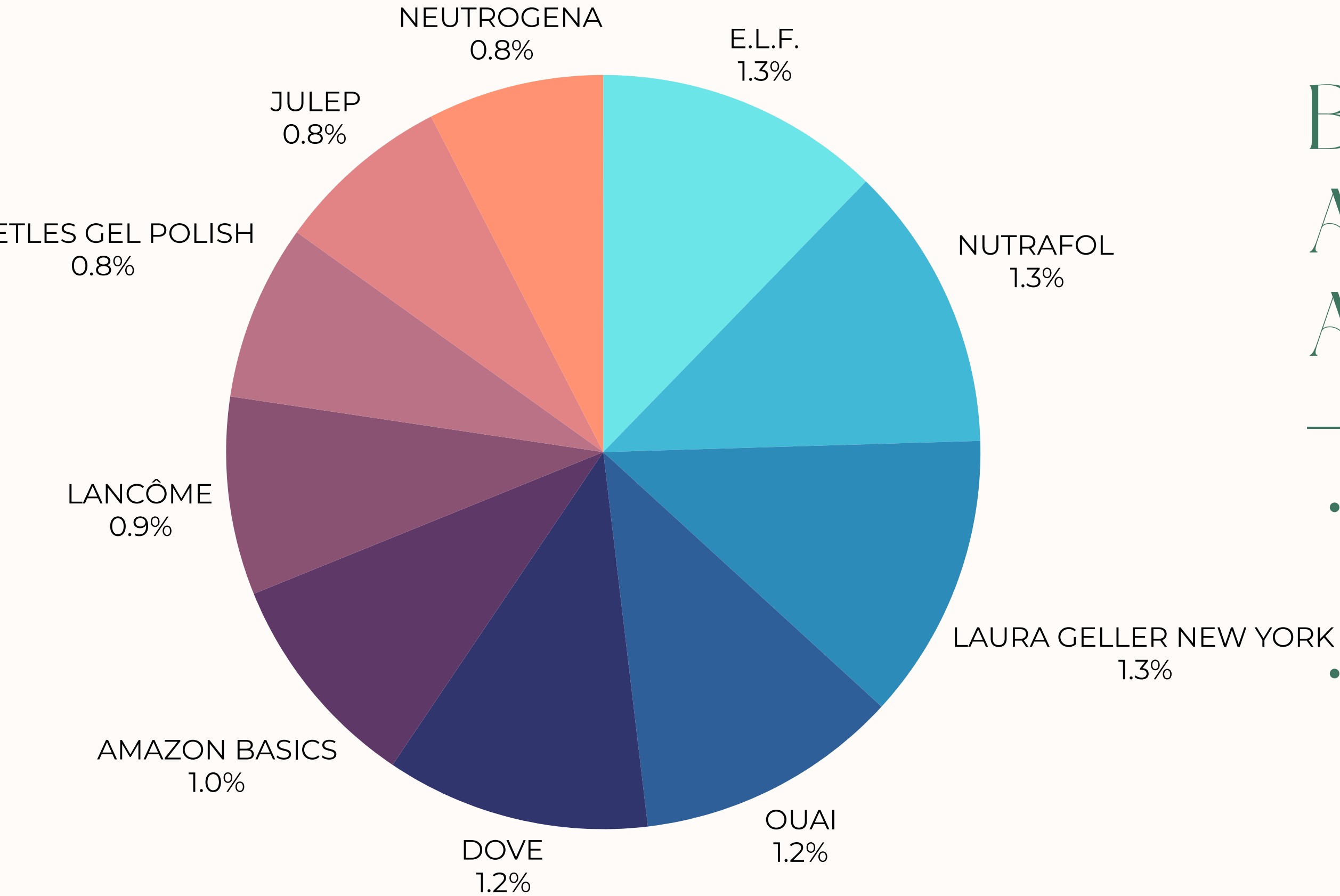
- Nutrafol: +2.4%
- La Roche-Posay: +2.2%
- MEDICUBE: +3.1%

- Top Losers:

- Neutrogena: -0.04%
- Sol De Janeiro: -6.3%
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# Beauty Advertising Activity

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- **The Top Brands represented 10.8% of all sponsored product activity** – see breakdown to the left.
- Sponsorship share is much closer than sales share with less than 0.5% between the top 10 brands

| Product  | Brand           |
|--|-----------------|
| Clean Skin Club Clean Towels XL™ 50 Ct, 1 Pack   | CLEAN SKIN CLUB |
| SimplyVital Collagen, Retinol & Hyaluronic Acid Cream 1.7 fl.oz.   | SIMPLYVITAL     |
| Boka Fluoride Free Toothpaste Nano Hydroxyapatite, 4 Fl Oz 1Pk   | BOKA            |
| Aquasonic Black Series Ultra Whitening Toothbrush  | AQUASONIC       |
| VALITIC Kojic Acid Dark Spot Remover Soap Bars with Vitamin C (2 Pack)   | VALITIC         |
| Super Strong Nail Glue For Nail Tips, Acrylic Nails and Press On Nails (8ml) NYK1 Nail Bond Brush On Nail Glue | NYK1            |
| Total Whitening Toothpaste Gel 4 Pack, 5.1 Oz Tubes  | COLGATE         |
| Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfolian   | PAULA'S CHOICE  |
| COSLUS Water Dental Flosser Teeth Pick   | COSLUS          |

The Top 9 sponsored products represented 19.9% of total sponsorship share.

- Clean Skin Club led sponsored activity with 4.5%, followed by SimplyVital at 3.2% and Boka at 2.1%. Oral care and devices from Aquasonic, Colgate, and Coslus held ground, while Paula’s Choice, Valitic, and NYK1 showed solid niche performance.



| Product  | Brand           |
|--|-----------------|
| Women's Balance Hair Growth Supplements                                  | NUTRAFOL        |
| Clean Skin Club Clean Towels XL™ 50 Ct, 1 Pack                           | CLEAN SKIN CLUB |
| Mighty Patch™ Original patch from Hero Cosmetics (36 Count)              | MIGHTY PATCH    |
| Toleriane Double Repair Face Moisturizer                                 | LA ROCHE-POSAY  |
| BIODANCE Bio-Collagen Real Deep Mask,                                    | BIODANCE        |
| Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant    | PAULA'S CHOICE  |
| Nizoral Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 7 Fl Oz | NIZORAL         |
| Sol de Janeiro Hair & Body Perfume Mist                                  | SOL DE JANEIRO  |
| Wonderskin Wonder Blading Lip Stain Peel Off Masque                      | WONDERSKIN      |

# The Top 9 products represented 34.7% of total Sales share.

- Nutrafol led Q1 gains with a 1.5% increase in share, now holding 7.9% of category sales. Wonderskin also saw strong momentum, up 1.4% to 2.2%. Clean Skin Club, Mighty Patch, and Nizoral held steady, each maintaining solid positions. Skincare staples from La Roche-Posay, Biodance, and Paula’s Choice saw slight declines.
- Sol de Janeiro posted the sharpest drop, down 2.1% to 2.4% share as fragrance declines coming out of Q4.
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# Fragrance

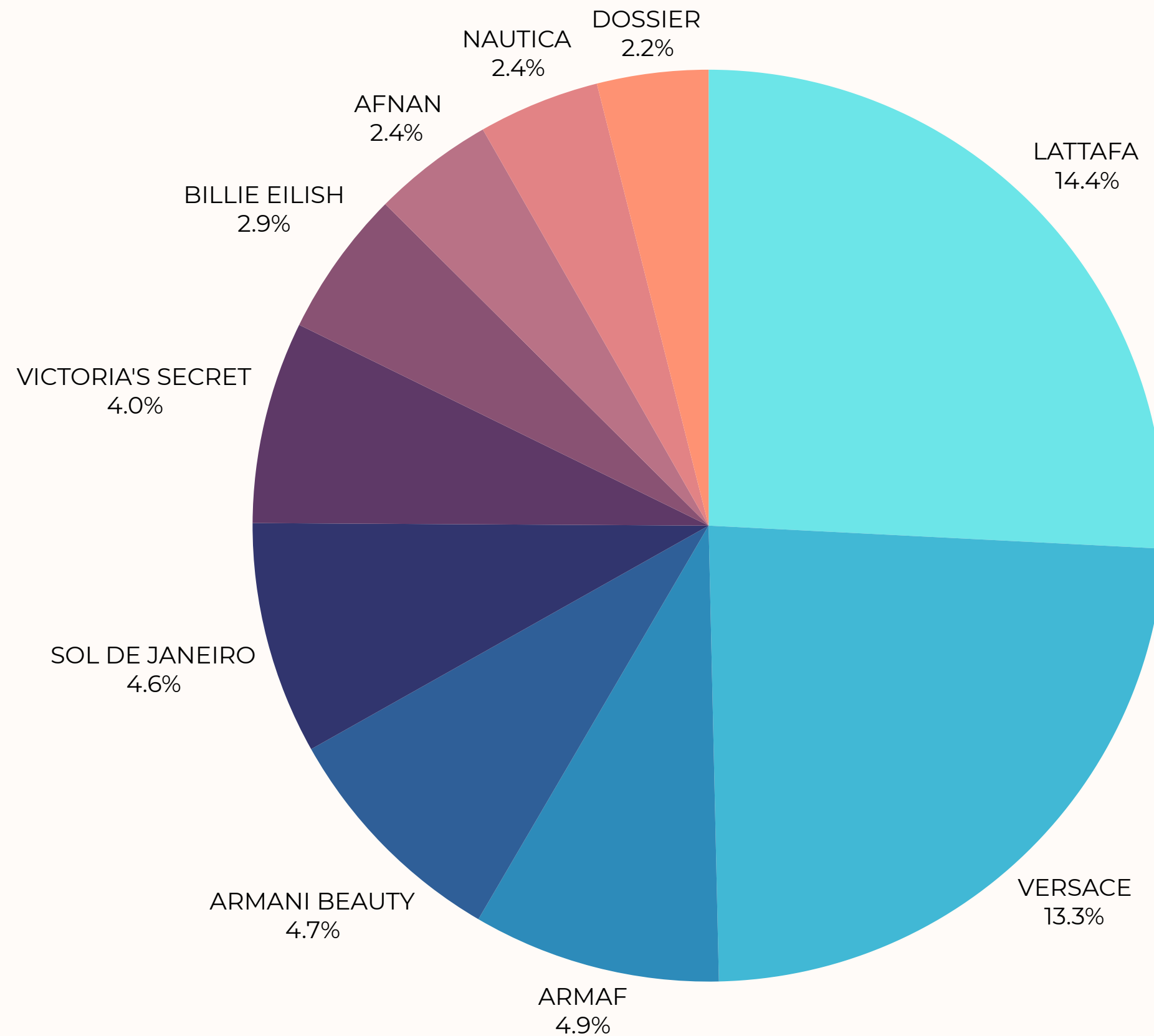
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Top brands, items and performance  
in the Fragrance category for Q1  
2025



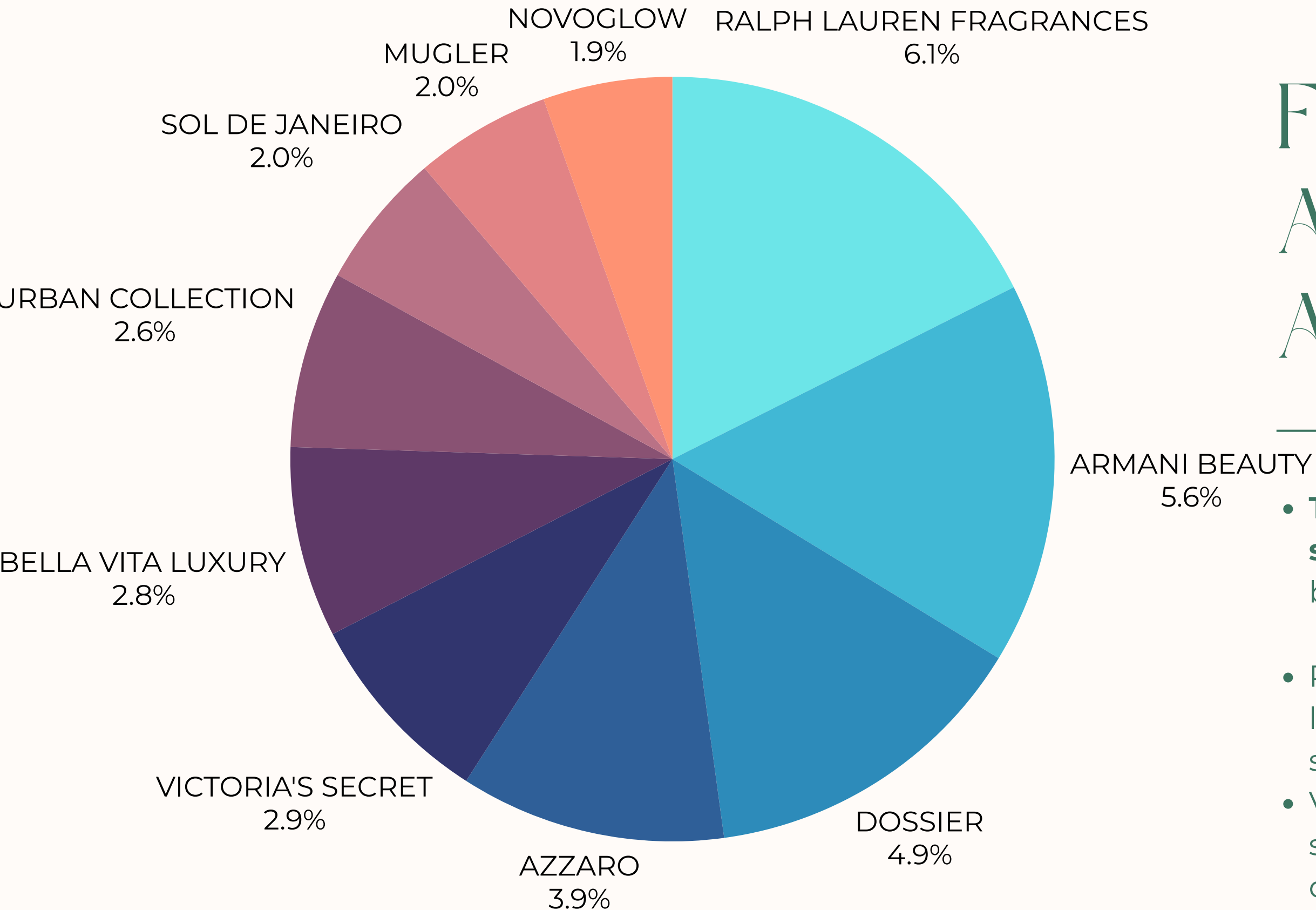
# Fragrance Share of Sales

## Top Brands In Fragrance



- Top brands in the category accounted for 55.8% of total sales. The average price point for the top 10 is \$47.67.
- Top Gainers:
  - Versace: +3.1%
  - Sol De Janeiro: +0.9%
  - Armaf: +1.9%
- Top Losers:
  - Dossier: -0.8%
  - Victoria's Secret: -1.1%

# Fragrance Advertising Activity



- **The Top Brands represented 34.7% of all sponsored product activity** – see breakdown to the left.
- Ralph Lauren has jumped to the top of this list but has yet to enter the top 10 brands by share of sales.
- Victoria's Secret has also seen a 2.3% drop in share of sponsorship correlating to their decrease in sales share.

| Product  | Brand                   |
|--|-------------------------|
| C5 for Women Eau De Parfum                                   | URBAN COLLECTION        |
| Azzaro The Most Wanted Parfum                                | AZZARO                  |
| Dossier - Ambery Vanilla 1.7Oz (50ml)                        | DOSSIER                 |
| Armani Beauty - Acqua di Giò - Eau de Toilette               | ARMANI BEAUTY           |
| Ralph Lauren - Polo Sport - Eau De Toilette                  | RALPH LAUREN FRAGRANCES |
| Elizabeth Arden Red Door Eau de Parfum Women's Perfume Spray | ELIZABETH ARDEN         |
| BellaVita Honey OUD Perfume for Women & Men (3.4 fl.oz)      | BELLA VITA LUXURY       |
| Viktor&Rolf - Flowerbomb Eau de Parfum                       | VIKTOR&ROLF             |
| Men's Luxury Perfume Gift Set (4 x 0.68 fl. oz.)             | BELLA VITA LUXURY       |

The Top 9 sponsored products represented 19.9% of total sponsorship share.

- In fragrance, Urban Collection led sponsored share at 2.8%, followed by Azzaro (2.5%) and Dossier (2.3%). Armani, Ralph Lauren, and Elizabeth Arden each held over 2%, while Bella Vita stood out with two top-performing SKUs.



| Product  | Brand          |
|--|----------------|
| Armani Beauty - Acqua di Giò - Eau de Toilette                                   | ARMANI BEAUTY  |
| Sol de Janeiro Hair & Body Perfume Mist  | SOL DE JANEIRO |
| Versace Eros for Men 3.4 oz Eau de Toilette Spray                                | VERSACE        |
| Lattafa Yara Eau de Parfum Long-Lasting Fragrance for Women, 3.40 Ounce / 100 ml | LATTAFA        |
| Versace The Dreamer for Men 3.4 oz Eau de Toilette Spray                         | VERSACE        |
| Lattafa Khamrah, 3.40 Ounce / 100 ml   | LATTAFA        |
| Rasasi Hawas For Men - Eau de Parfum Spray 100ML (3.4 Oz)                        | RASASI         |
| Versace Bright Crystal by Versace for Women 3.0 oz Eau de Toilette Spray         | VERSACE        |
| Afnan 9 PM For Men Eau De Parfum, 3.4 Fl. Oz                                     | AFNAN          |

The Top 9 products represented 20.4% of total Sales share.

- Armani Beauty led fragrance sales with 4.6% share, followed by Sol de Janeiro at 3.6% and Versace Eros at 2.9%. Lattafa and Versace each had multiple top-sellers, while Rasasi and Afnan held steady with strong niche appeal.

# Skincare

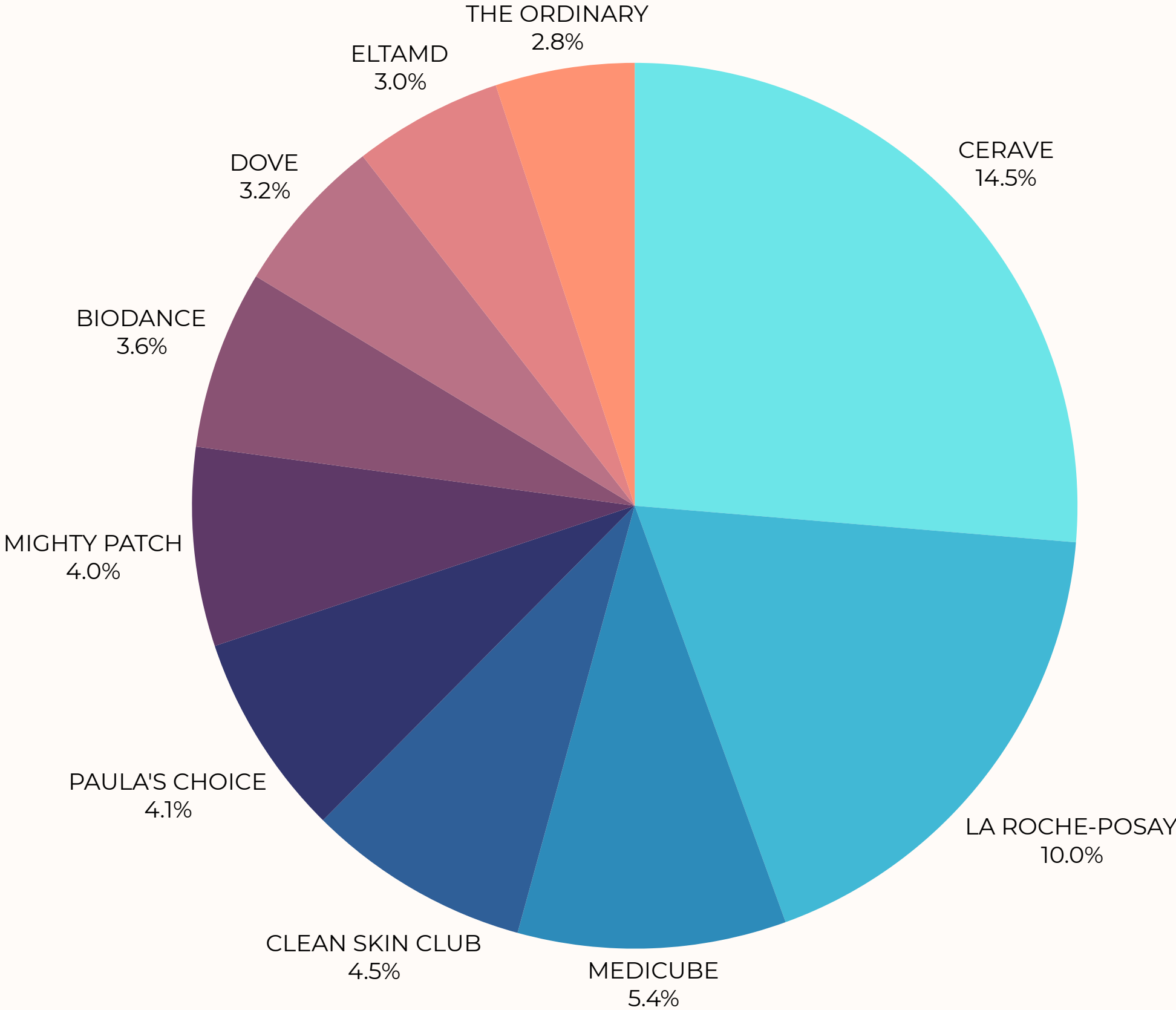
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Top brands, items and performance  
in the Skincare category for Q1 2025



# Category Share of Sales

## Top Brands In Skincare



• Top brands in the category accounted for 55.2% of total sales. The average price point for the top 10 is \$29.72.

• Top Gainers:

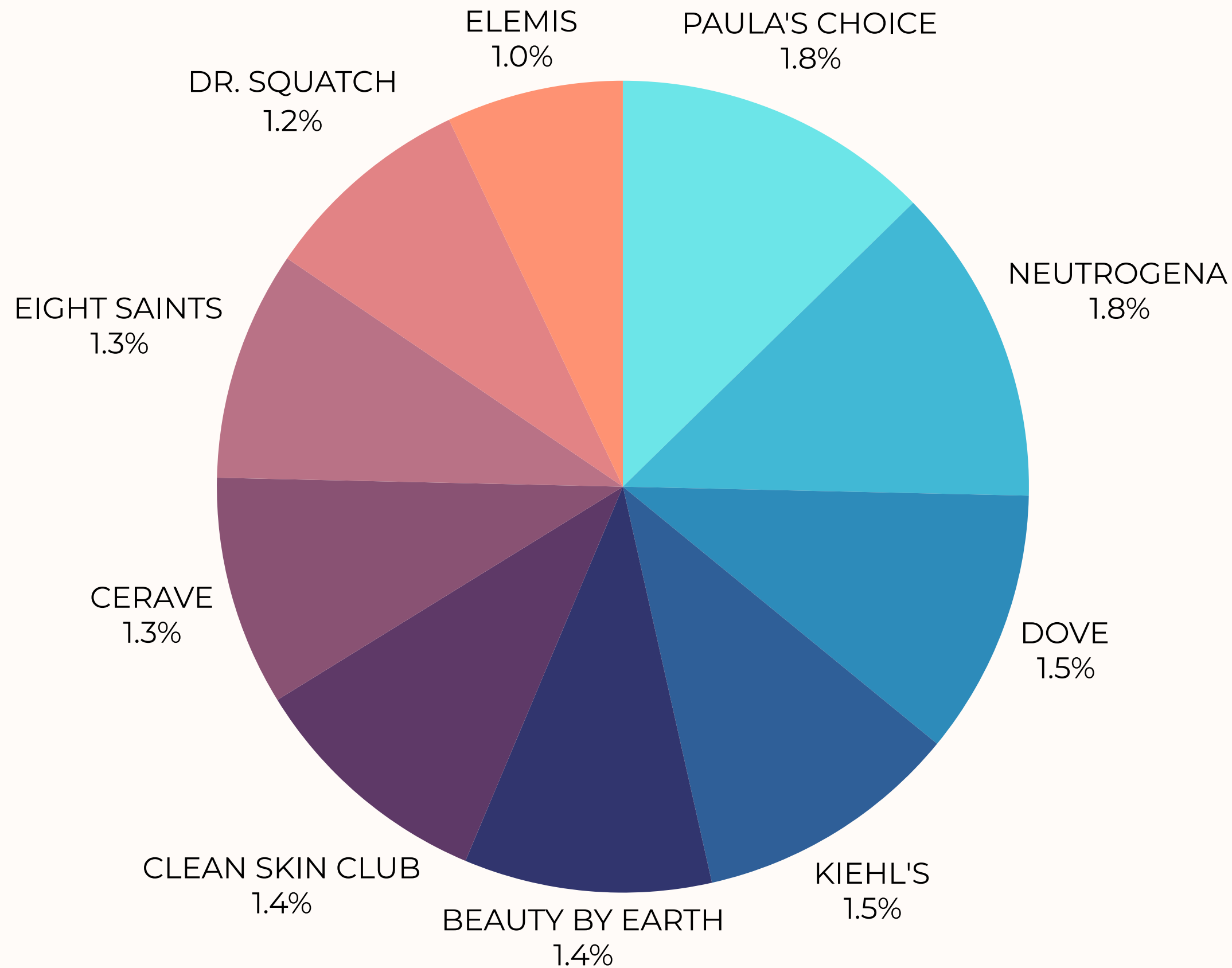
- The Ordinary: +2.8%
- La Roche-Posay: +1.3%
- Medicube: +3.9%

• Top Losers:

- Laneige: -3.6%
- COSRX: -1.4%
- Burts Bees: -1.8%

# Skincare Advertising Activity

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- **The Top Brands represented 14.4% of all sponsored product activity** – see breakdown to the left.
- Top brands share of advertising has decreased QoQ as brands pull back budget coming out of Q4.

| Product  | Brand               |
|--|---------------------|
| Clean Skin Club Clean Towels XL™ Ultra Soft, 50 Ct, 1 Pack             | CLEAN SKIN CLUB     |
| SimplyVital Collagen, Retinol & Hyaluronic Acid Cream 1.7 fl.oz.       | SIMPLYVITAL         |
| VALITIC Kojic Acid Dark Spot Remover Soap Bars with Vitamin C (2 Pack) | VALITIC             |
| Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant  | PAULA'S CHOICE      |
| TruSkin Vitamin C Serum For Face, 1 Fl Oz                              | TRUSKIN<br>NATURALS |
| CNP Honey Lip Butter - Propolis Lipcerin™ Original, 0.5 fl.oz.         | CNP                 |
| BIODANCE Bio-Collagen Real Deep Mask, 34g x4ea                         | BIODANCE            |
| Beauty by Earth Self Tanner, Moisturizing Self Tanning Lotion          | BEAUTY BY<br>EARTH  |
| Obagi Hydrate Facial Moisturizer                                       | OBAGI MEDICAL       |

The Top 9 sponsored products represented 28.1% of total sponsorship share.

- Clean Skin Club led skincare sponsorships with 7.4%, reinforcing its position as a category staple. SimplyVital’s strong 5.2% share reflects rising consumer interest in multi-benefit moisturizers.
- Paula’s Choice and TruSkin maintained steady visibility with proven hero SKUs, while Valitic’s dark spot soap and CNP’s lip butter highlight growing demand for targeted, affordable treatments.



| Product   | Brand           |
|---|-----------------|
| Clean Skin Club Clean Towels XL™ 50 Ct, 1 Pack                        | CLEAN SKIN CLUB |
| Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant | PAULA'S CHOICE  |
| Mighty Patch™ Original patch from Hero Cosmetics (36 Count)           | MIGHTY PATCH    |
| Toleriane Double Repair Face Moisturizer                              | LA ROCHE-POSAY  |
| BIODANCE Bio-Collagen Real Deep Mask 34g x4ea                         | BIODANCE        |
| EltaMD UV Clear Face Sunscreen SPF 46                                 | ELTAMD          |
| CeraVe Moisturizing Cream, 19 Ounce                                   | CERAVE          |
| grace & stella Under Eye Mask (24 Pairs, Gold)                        | GRACE & STELLA  |
| SimplyVital Collagen, Retinol & Hyaluronic Acid Cream 1.7 fl.oz.      | SIMPLYVITAL     |

# The Top 9 products represented 30.5% of total sales share.

- Hero products drove steady sales in Q1, with Clean Skin Club, Paula’s Choice, and Mighty Patch each securing over 4% share. EltaMD posted the strongest growth (+0.8%), reflecting rising demand for dermatologist-recommended sunscreen. Biodance and SimplyVital also gained traction, while legacy staples like CeraVe and La Roche-Posay held flat but strong positions.
- Interestingly Medicube is positioned as the number 10 product with huge QoQ growth

# Hair Care Amazon

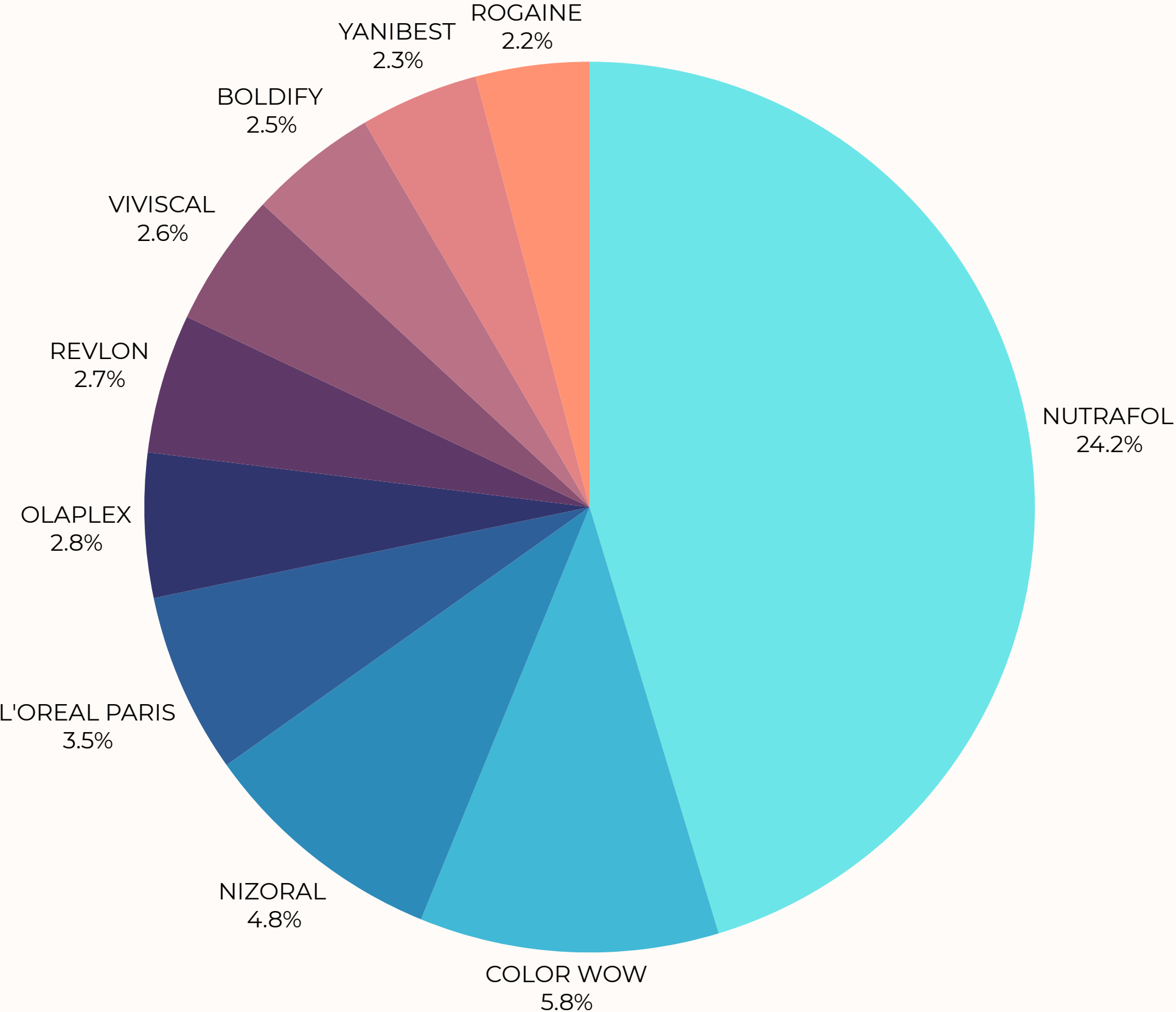
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Top brands, items and performance  
in the Hair Care category for Q1 2025



# Category Share of Sales

## Top Brands In Hair Care



- Top brands in the category accounted for 53.5% of total sales.

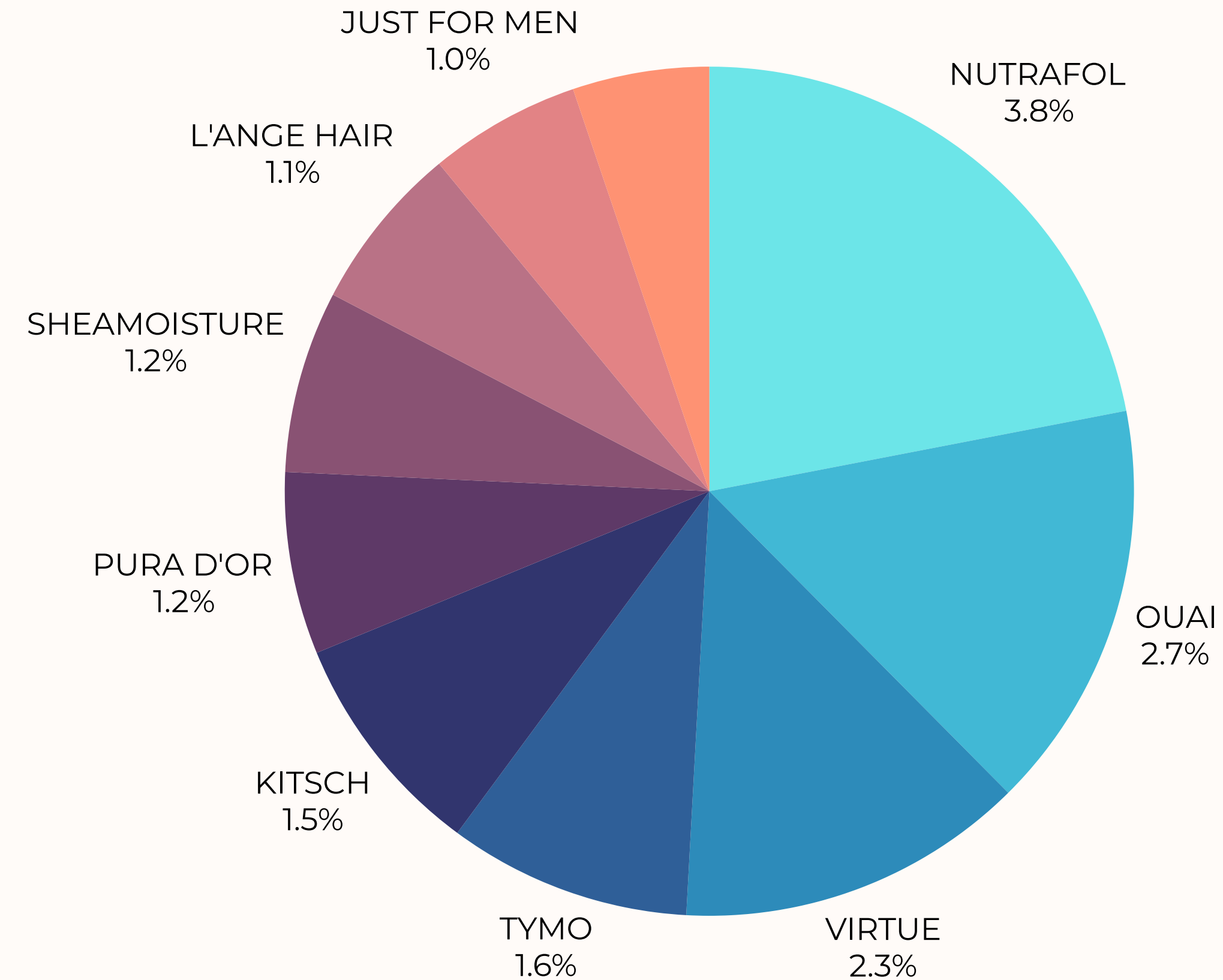
- Top Gainers:
  - Nutrafol: +6.1%
  - Color Wow: +1%
  - Nizoral: +1.5%

- Top Losers:
  - Olaplex: -0.8%
  - Revlon: -1.3%
  - Kitsch: -1.4%

# Hair Care Advertising Activity

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- **The Top Brands represented 17.3% of all sponsored product activity** – see breakdown to the left.
- Nutrafol continues to lead the category a close race between the rest of the competitors.



| Product  | Brand     |
|--|-----------|
| Nutrafol Women's Hair Growth Supplements, Ages 18-44   | NUTRAFOL  |
| Full Sulfate Free Volumizing Shampoo Thickens Hair, Safe for All Hair Types, Color Safe                  | VIRTUE    |
| Nutrafol Shampoo, Cleanse and Hydrate Hair and Scalp   | NUTRAFOL  |
| Conditioner, Physician-formulated for Thinning Hair,   | NUTRAFOL  |
| Women's Balance Hair Growth Supplements, Ages 45 and Up  | NUTRAFOL  |
| Nutrafol Men Hair Growth Supplement 120 Count (Pack of 1)  | NUTRAFOL  |
| Women's Balance Hair Growth Supplements, Ages 45 and Up  | NUTRAFOL  |
| PURA D'OR Anti-Thinning Biotin Shampoo & Deep Moisturizing Conditioner Original Gold Label Set (16oz x2) | PURA D'OR |
| Ouai Fine Shampoo and Conditioner Set  | Ouai      |

The Top 9 sponsored products represented 18.8% of total sponsorship share.

- Nutrafol dominated hair care sponsorships with multiple listings across supplements, shampoo, and conditioner, reflecting its multi-SKU strategy and category leadership. Virtue held strong at 2.3%, signaling consumer interest in clean, volumizing formulas. PURA D’OR and OUAI rounded out the top with solid performance in anti-thinning and premium hair care sets.



| Product  | Brand       |
|--|-------------|
| Women's Balance Hair Growth Supplements, Ages 45 and Up  | NUTRAFOL    |
| Nutrafol Women's Hair Growth Supplements, Ages 18-44   | NUTRAFOL    |
| Nutrafol Men Hair Growth Supplement 120 Count (Pack of 1)  | NUTRAFOL    |
| Nizoral Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 7 Fl Oz   | NIZORAL     |
| Viviscal Hair Growth Supplements for Women 30 Day Supply, 60 Count   | VIVISCAL    |
| COLOR WOW Dream Coat Supernatural Spray  | COLOR WOW   |
| YANIBEST Silk Bonnet for Sleeping Women Satin Bonnet Double Layer Satin Lined Hair Bonnet with Tie Band Curly Hair | YANIBEST    |
| Moroccanoil Treatment  | MOROCCANOIL |
| COLOR WOW Xtra Large Bombshell Volumizer   | COLOR WOW   |

The Top 9 products represented 39.6% of total sales share.

- **Supplements Dominate**
  - Nutrafol holds a commanding lead in the category with 13.6% share for their top product. 4 of the top 5 best selling products in the category are now supplements as the category has exploded in growth in recent years.

# Makeup

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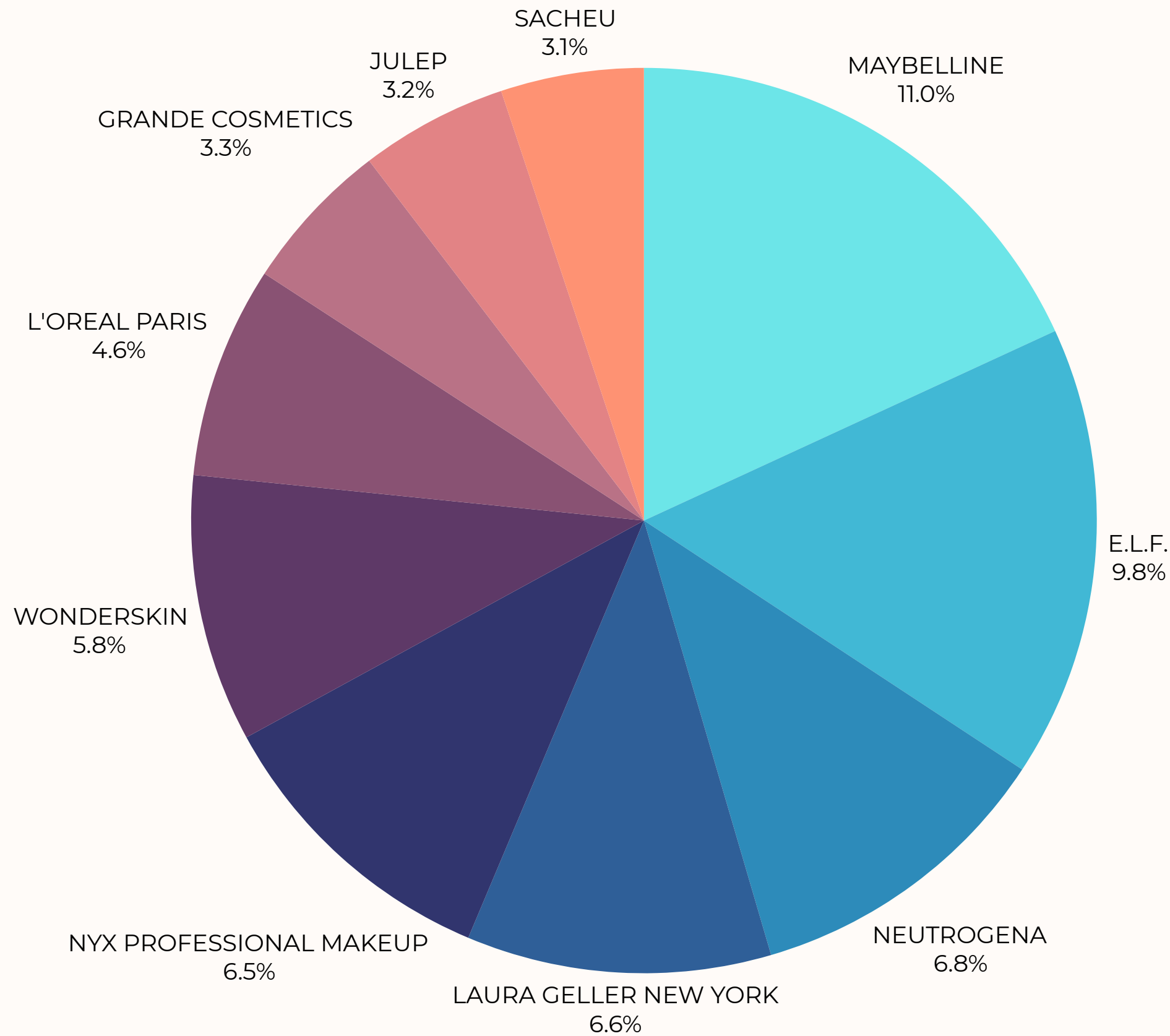
Top brands, items and performance  
in the Makeup category for Q1 2025



# Category Share of Sales

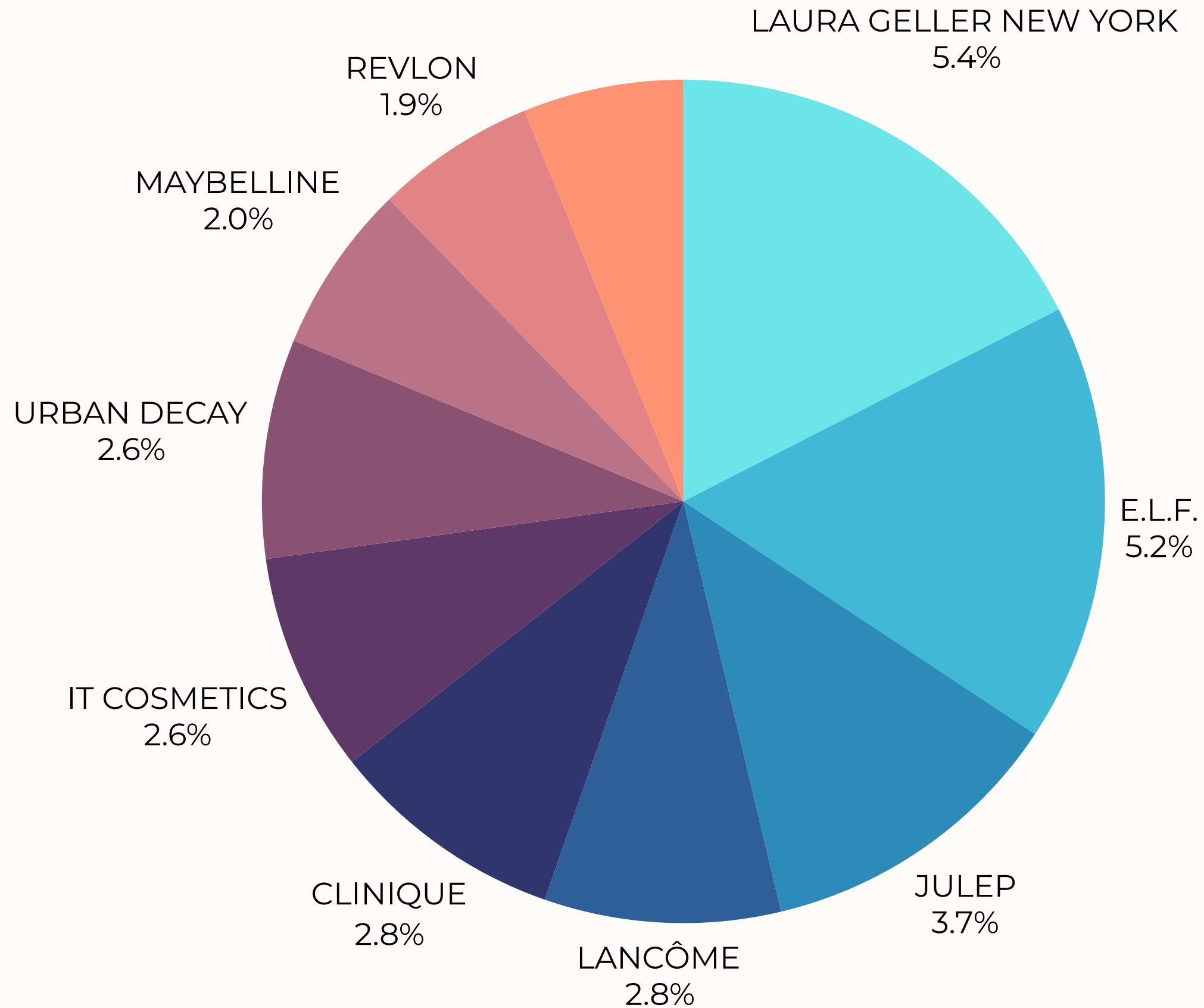
## Top Brands In Makeup

- Top brands in the category accounted for 60.6% of total sales. The average price point for the top 10 is \$18.41.
- Top Gainers:
  - Wonderskin: +2%
  - Maybelline: +1.2%
  - Elf: +1%
- Top Losers:
  - Laura Geller: -0.4%
  - Clinique: -1.2%
  - Grande Cosmetics: -0.3%



# Makeup Advertising Activity

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- **The Top Brands represented 30.8% of all sponsored product activity** – see breakdown to the left.
- There was significant increase in advertising share for some of these top brands, Laura Geller held the top spot with little change while brands like Elf, Lancome, Clinique and IT Cosmetics increased share by 0.8%.



| Product  | Brand                 |
|--|-----------------------|
| Urban Decay Naked 2 Basics Eyeshadow Palette         | URBAN DECAY           |
| Laura Geller The Best of the Best Baked Palette      | LAURA GELLER NEW YORK |
| IT Cosmetics Superhero Mascara                       | IT COSMETICS          |
| Queen Cobra Black Mascara                            | SELESTIA BEAUTY       |
| Glow Reviver Lip Oil – Jam Session                   | E.L.F.                |
| Julep Eyeshadow 101 – Champagne Shimmer              | JULEP                 |
| PrimeLash Mascara for Older Women                    | PRIME PROMETICS       |
| Laura Geller Balance-n-Brighten Foundation – Fair    | LAURA GELLER NEW YORK |
| bareMinerals Original Loose Powder Foundation SPF 15 | BAREMINERALS          |

The Top 9 sponsored products represented 18.5% of total sponsorship share.

- Urban Decay led Q1 makeup sponsorships with 2.9% share, fueled by strong interest in neutral palettes. Laura Geller saw continued investment across multiple hero SKUs, totaling over 4% combined. IT Cosmetics’ Superhero Mascara held strong at 2.5%, while emerging and niche brands like Selestia, Prime Prometics, and Julep found traction with targeted, high-performance products. E.l.f.’s Glow Reviver Lip Oil also made a notable appearance, signaling growing demand for hybrid lip care.



| Product   | Brand                 |
|---|-----------------------|
| Wonderskin Wonder Blading Lip Stain                 | WONDERSKIN            |
| Neutrogena Makeup Remover Wipes                     | NEUTROGENA            |
| GrandeLASH-MD Lash Enhancing Serum                  | GRANDE COSMETICS      |
| DRMTLGY Tinted Moisturizer SPF 46                   | DRMTLGY               |
| Anua Heartleaf Cleansing Oil                        | ANUA                  |
| Maybelline Lash Sensational Sky High Mascara        | MAYBELLINE            |
| Laura Geller Balance-n-Brighten Foundation - Medium | LAURA GELLER NEW YORK |
| Laura Geller Balance-n-Brighten Foundation - Fair   | LAURA GELLER NEW YORK |
| Babe Original Lash Serum                            | BABE ORIGINAL         |

The Top 9 products represented 26.2% of total sales share.

- Wonderskin led makeup sales growth with a 2.1% gain, now holding 5.8% share thanks to strong demand for long-wear lip products. Neutrogena and DRMTLGY also posted gains, reflecting interest in hybrid skincare-makeup items. Laura Geller saw mixed results across shades, while Grande Cosmetics and Anua declined, suggesting softening interest in specialty treatments and cleansing oils.

# Key Takeaways

## Market Performance & Brand Movements

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- **Nutrafol solidified its leadership in the hair care category** with 24.2% market share, powered by a multi-SKU dominance in supplements, shampoo, and conditioner. Its strategic paid investment and cross-platform brand awareness made it one of the most visible and fastest-growing brands on Amazon in Q1.
- **CeraVe remained the top skincare brand**, though its share dipped slightly. Meanwhile, **La Roche-Posay and Medicube** posted notable growth, both benefiting from paid ad strategies and sustained consumer trust in dermatologist-backed products.
- **Fragrance became more fragmented**, with legacy names like Versace and Armani maintaining momentum, while newer players like Lattafa and Afnan expanded share through lower price points and appealing scent profiles.
- **Makeup growth was driven by innovation and targeted marketing**, with Wonderskin leading growth (+2.1% share increase) and niche players like Laura Geller, Prime Prometics, and Selestia Beauty carving out space with differentiated positioning and aging-inclusive messaging.
- **Product-level focus continues to outperform brand-level campaigns**—hero SKUs accounted for a disproportionate amount of both sales and ad performance, reinforcing the value of a narrowed, ROI-driven advertising strategy.

# Key Takeaways

## Advertising & Competitive Landscape

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- **Advertising activity remained highly consolidated**, with the top 9 sponsored products representing a significant share of total ad spend across every subcategory. Clean Skin Club, Urban Decay, and Nutrafol dominated in their respective spaces due to precise, product-led ad strategies.
- **Emerging brands continue to punch above their weight**, particularly in skincare and fragrance. SimplyVital, Valitic, Bella Vita, and Biodance all saw traction thanks to aggressive ad investment paired with distinct, benefit-led product positioning.
- **Skincare saw a shift toward targeted, multifunctional treatments**—consumers are favoring SKUs that combine multiple benefits (e.g., moisturizers with SPF, serums with brightening + anti-aging). This trend also extended to makeup with the rise of hybrid products like DRMTLGY’s tinted SPF moisturizer and long-wear, skincare-infused color products.
- **Advertising growth is increasingly tied to operational efficiency**. Brands that deployed clear budget prioritization toward proven products outperformed those with broad or reactive spend patterns. There is growing need for cross-functional alignment across content, ad strategy, and inventory to capitalize on momentum.

# Looking Ahead

## Q2 2025 Outlook & Emerging Risks

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- **Prime Day prep will begin**, shifting budgets toward ad testing and promotional planning. Expect softer conversion in late Q2 as brands ramp toward July.
- **Hair supplements and fragrance remain high-growth areas**, though competition is increasing. CPC volatility may rise in saturated segments.
- **Multifunctional and dermatologist-backed products are likely to outperform**, as consumers seek value and proven results.
- **Brands integrating off-Amazon efforts** (influencers, DTC traffic) will have a performance edge as CPCs climb and on-platform competition intensifies.

# Our Channels

We collaborate with our brands to craft comprehensive strategies that break down silos, creating a **holistic, consumer-focused approach** across the entire e-commerce landscape.



# Why Choose Us?

1

## Beauty Expertise

We focus solely on the beauty and wellness sector and have gained a deep expertise in this niche.

2

## Full Service

We do it all for you. Navigo is a one-stop solution for all your Retail Media management needs.

3

## Data-Driven

We monitor industry, competitive, and brand-specific trends, using that data to inform our decisions and drive ROI.

4

## 100% Dedicated

Our model ensures we are 100% committed to growing your account - that's why 94% of our clients renew.





# LIP LINER STAY-N

Peel Off Lip Liner

- ✓ Water-resistant
- ✓ Long-wear, up to 12 hours!
- ✓ Smudge-proof
- ✓ Safe nourishing ingredients
- ✓ Transfer-proof



**fur**

*THOUGHTFULLY FORMULATED*  
*NATURALLY POWERED*

Clean beauty crafted with clean ingredients,  
to care for your most sensitive areas

**fur**  
MICROVITAMIN ELIMINATOR SERUM™  
HYDROLYZED VITAMIN C & HYDROLYZED VITAMIN E  
1.7 FL. OZ. (50 mL)

**fur**  
SILK SCRUB™  
SILK & SQUALANE  
1.7 FL. OZ. (50 mL)

**fur**  
DARK SPOT VANISH PATCH™  
TARGETING & BRIGHTENING  
12 MICROVITAMIN PATCHES

SHOP FUR



**OVERSIZED DOE FOOT**  
CURVED TO HUG LIPS

**NON-STICKY FINISH**

**PLUMPS,  
BUT NEVER BURNS**

Shade: Velvet Daisy

LAWLESS

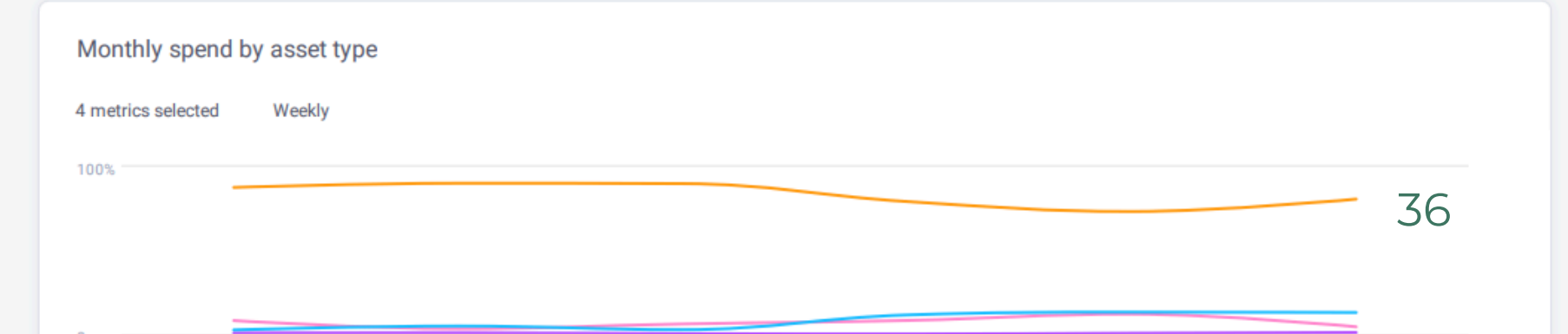
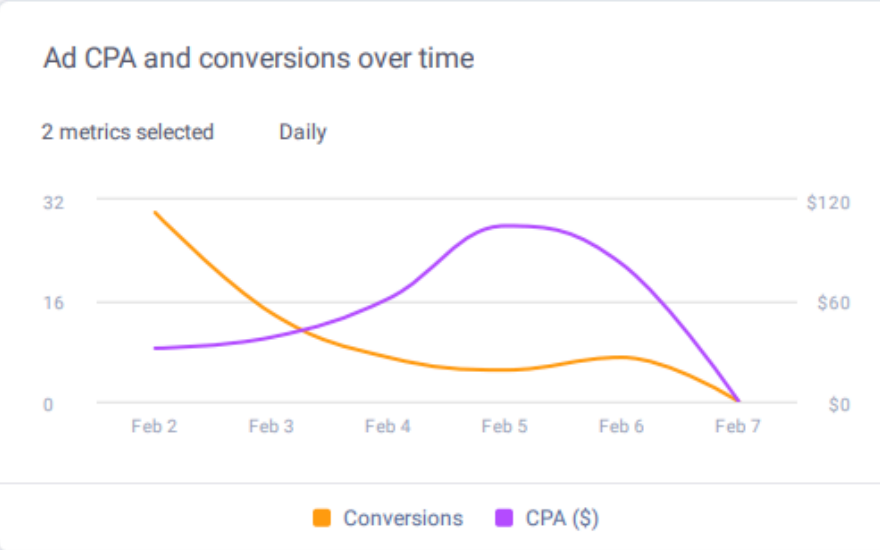
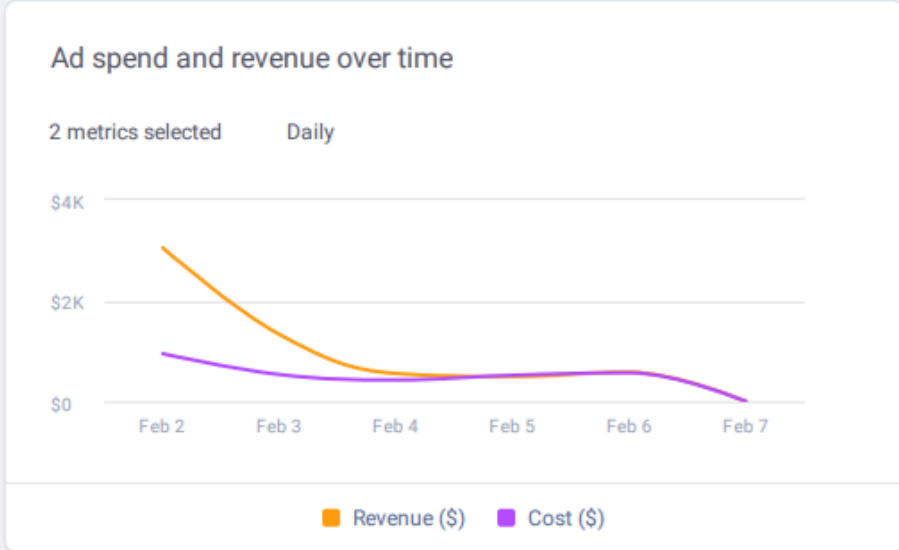
# Content drives performance

Our team of in-house creative designers works with our paid team to develop performance creative that moves the needle.

# Connecting the Dots Between Paid Performance and Growth

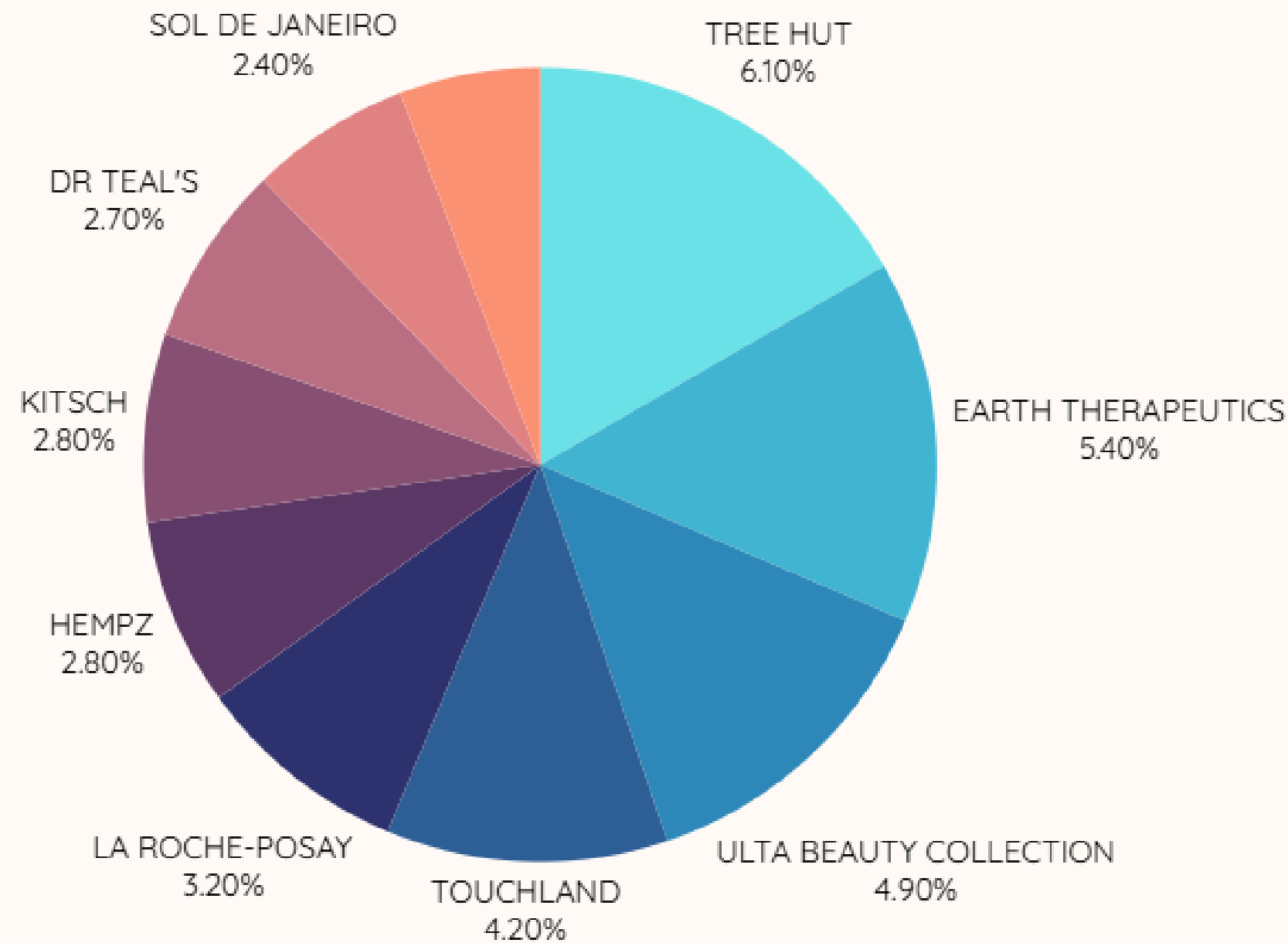
Using data to tell the story and drive  
decisions across channels.

## Executive summary

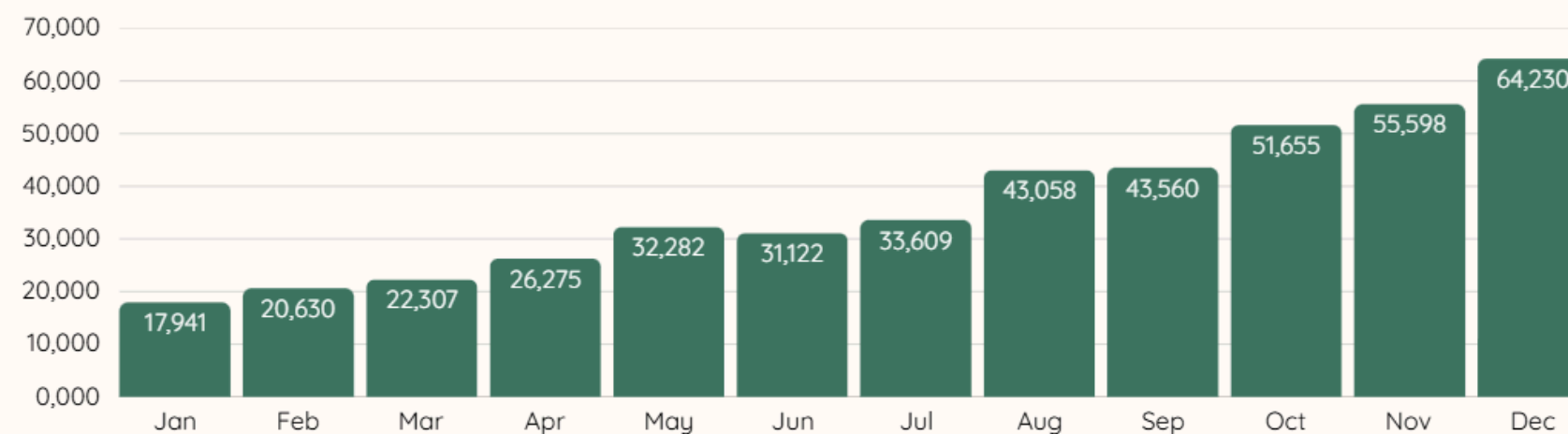




## Body Care Category Share of Sales



Advertising Activity Over Time



## Measuring impacts where the customer shops

Our unique data set gives you insight into how your brand is performing not just on your own site but other major channels like:

- Amazon
- Ulta.com
- Sephora.com

We measure key metrics and integrate into our process to understand Share of Sales, Search changes, Share of Advertising and more.

Navigo



Let's start our journey together.

Jacob St. John | Founder  
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