



High Impact Marketing

Standing out in a digital marketplace

This White paper is for educational purposes only. Agents should be sure to examine and follow the Company's Advertising Guidelines, including the Social Media Policy.



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How to leverage digital tools
to grow your insurance practice

Many producers in the field hear digital marketing is important to being successful and panic. They immediately assume social media is the topic. Digital marketing, though, is not just social media, and it's not just internet marketing. Digital marketing is simply the next set of tools that will carry your core messaging in new and different ways. The message and what you bring to the table stay consistent, but digital marketing now offers you new vehicles to get your words to a broader audience.



See the big picture

This white paper is the first in a series focused collectively on better leveraging your time and efforts to grow your business. The series will look at a wide variety of topics including client satisfaction, getting quality referrals and working with multiple generations.

This article series focuses on the big picture and offers numerous, practical ways to make the most of your time and help boost your productivity.

Maybe more importantly, it helps you reflect on what you're currently doing to market yourself and your business - and how you can improve. It'll raise questions like:

1. Do you spend enough time, effort and money at marketing?
2. Have you successfully promoted your practice, differentiating yourself from your competitors?
3. Once you get a new client, do you maximize your business relationship and also make them into raving fans?
4. Do you effectively market to the successors of your customers, whether business successors or family successors via intergenerational marketing?

This first article focuses on your prospecting efforts through the use of digital marketing tools. Those tools include your website, video and audio production and social media among others. We've skipped the basics to provide deeper, more actionable ideas.

Social media done better

As you've undoubtedly heard or learned, getting your approach to social media right is much easier said than done. There have been hundreds of fine articles on how to do social marketing, but the art and science is still in its infancy. There is quite a bit of confusion on the part of agents and advisors as to what they are allowed to do—and how to do it without spending all of their time in front of a computer screen. There is also a tremendous amount of frustration from not seeing results quickly enough. For many, it seems that a huge effort is required to obtain minimal results. The tips that follow aren't an end-all, be-all solution. They offer a starting point to establish a foothold in this space and make more efficient use of your time working in it. As the social media landscape continues to quickly evolve, it'll be important for you to keep up with the trends.

Without doubt LinkedIn, Facebook, Twitter and other social sites can be great places to meet people and market your products and services. The thought of having only two or three degrees of separation between you and scores of ideal customers is exciting. The technology and opportunities involved are tremendous, making it easier to market than any time in history.

"Social sites can be great places to meet people and market your products and services."

What does "leverage" mean?

It's a mistaken belief that working hard will automatically lead to success. You also have to work smart. You must have the right tools and approaches and be adaptable to changing circumstances. Assuming that you have the right tools and knowledge to succeed, consider how using leverage might increase your effectiveness.

As long as you are working hard - making phone calls and getting yourself known - you could increase your probability of success. However, pushing the stone using all of your personal or team strength requires huge effort. Nevertheless, you can only do so much by yourself before you become exhausted.

You can also leverage your efforts with other people and different approaches that could lead to increased rewards. Using a lever allows you more "bang for the buck" with less effort. Here we'll concentrate on how to disseminate your knowledge more quickly, thoroughly and effectively.

When you use a lever AND a fulcrum, the power of your individual and team efforts is dramatically amplified. You use less time and effort for the same level of success. Or, put another way, the same time and effort will dramatically increase the size of your success.

Leveraging your prospecting efforts with a more robust social media effort while developing your brand and credibility can be a very effective approach.

"As long as you are working hard...you could increase your probability of success."

Problems faced by agents/advisors

There are three distinct problems faced by agents and advisors when it comes to digital marketing:

1. Confusion about what you're allowed to do or write about on the internet
2. The mechanics and tools of an effective web presence
3. The use of leverage to maximize results

#1 Confusion about what you're allowed to do or write about

The relative newness of social media in the digital marketplace has resulted in a lot of confusion due to contradictory information and changes in regulatory interpretations. The fact that some agents/advisors have abused the system has resulted in an very conservative stance on the part of regulators, firm legal and compliance departments as well as the realization that things are rapidly changing.

There is a rather simple potential solution to this problem – carrier- or industry-approved materials. Industry associations and marketing organizations also have materials that you can draw upon. Here is an industry organization example worth checking out – indexedannuityinsights.org.

In fact, there is so much information on financial topics that you could probably conduct a different seminar each week for a year and not run out of things to say. Therefore, you also have a tremendous amount of material to draw from for articles and blog posts.

Some of the benefits of such an approach are illustrated in the third section of this article. The key point is not to promote anything to the general public that hasn't been previously approved.

#2 The mechanics and tools of an effective web presence

You may not have the ability to custom-build your own website to take advantage of the full marketing capabilities offered in web marketing. If your firm requires that you have a standard website for you and your team, you may not have a lot of flexibility in how you establish your web presence. If this is the case, at least try to ensure that your descriptions match the key words you're trying to emphasize and what your ideal customers are looking for in an insurance agent or advisor.

A simple customer survey will allow you to determine those words, phrases and characteristics. Ask your best clients what they like about you or how they would describe you to others, and then incorporate the most common words and characteristics into your descriptions. This simple change of wording will help you resonate with your ideal prospects. **However, if you have some flexibility in how you can establish a web presence, you'll want to consider the following:**

- **Create a special landing page for each of the products and services you are trying to promote.**

For example, if someone is looking for fixed index annuities, they don't want to land on your home page and have to search your site for this information.

Web studies indicate that if someone doesn't find what they're looking for within 10 seconds of arrival on a site, they tend to leave. Therefore, you'd have a much better chance of capturing their attention if they were linked to a page that specifically deals with the topic they're interested in.

- **Have a way of capturing names and interests of web visitors.** At a basic level, you can use a guest/visitor page and ask people to give you their name and email address in exchange for something they perceive as valuable. Most often this is a white paper dealing with a topic of interest to them. You can have a guest page for each of your landing pages or allow people to check off their key area(s) of interest.

Ideally, you can use an autoresponder service such as aWeber, GetResponse, Talk Fusion, iContact, or any of the others that allow you to have a series of pre-programmed responses for drip marketing purposes. There are many such services at various price levels. Unless you're working on a regional or national level, you don't need anything fancy.

- **Blogs and articles: Have a blog and make regular posts to keep your name in front of people and provide them with worthwhile information.**

As a rule of thumb, generate a blog post every other week at a bare minimum. To make it easier on yourself, create a bunch of written and/or audio content at one time and then post it over time. There are software programs that can post for you automatically at any schedule you choose.

- **Since you gathered names and contact information through your website earlier, you can send them an email whenever you make a post.** You can also invite them to seminars/webinars that may be of interest to them, offer them podcasts or replays of presentations as well as a number of the other things mentioned in the next section of this article.

All of the above is in preparation for the social media marketing that will help propel you to success. Everything mentioned above, plus numerous other key site items, are rather simple for a good web master.¹

Assuming that you have the materials to market and the website to market them, consider how you may be able to more effectively leverage your activities and create multiple ways to connect with new people.

¹ Very important note: Web masters, designers and marketers require completely different skill sets that can be mutually exclusive. A web master is tasked with making sure everything works on the site and is the person you will rely upon to keep the site up and working. A web designer makes the site look compelling and easy to navigate. A web marketer makes the site viable and gets people to visit the site and consume the materials within it. It is extraordinarily rare for one person to do all three tasks. Maybe two of the three, but not all three. When setting up a site, or enhancing an existing site, decide on the marketing objectives first, then bring in a designer followed by the web master. You provide or approve the web content, but the others make your site viable. One more point: you're better off with a plain site that people visit regularly than a gorgeous site that no one hears about.

#3 The use of leverage to maximize results

Recycle, reuse, repurpose. That's the whole idea behind leverage. Take the content you create and/or pass along to your prospects and clients, and then slice and dice that information in a myriad of ways so that it can be distributed over multiple channels.

If you effectively capture the information upfront, you can efficiently distribute it broadly on the back end.

Create versatile, quality content

Content creation refers to any materials that you produce in order to distribute as part of your marketing efforts. The point here is to create materials once and then be able to distribute them in a number of different formats. Here's an example. Start with subject matter you might normally discuss at an individual sales presentation or at a seminar. Within that content, you might have material for several blog posts, an enewsletter, some videos, a podcast episode, dozens of social media posts and more.

Some people like to listen to a presentation while driving to and from work. Give them an audio recording in the form of a podcast. Other people like to read. Great. Give them the same information in the form of an article, white paper or a book.

Some people prefer to get their information from the internet. Blog posts are good for them. Others from a newspaper or magazine. The same material is offered to them in that mode. Others like CDs or DVDs. You get the point. In essence, one piece of content can be distributed across multiple channels and in multiple formats. *(By the way, 95 percent of the work can be easily done by someone other than you. Yes, you have to be involved but only minimally if you delegate.)*

Each piece, regardless of format, leads the listener back to you for an appointment or for additional information. Each piece may also suggest that they give a copy to their friends.

"The point here is to create materials once and then be able to distribute them in a number of different formats"

Putting this approach to work for you

Imagine this potential scenario

You record a presentation on a topic of interest to your prospects, and then make the recording - full or edited - available to prospects and clients for them to listen to on their smart phones, tablets or computers. They may also forward the recording to like-minded friends and family. A series of recordings can become a CD that you distribute to prospects, clients and strategic alliances.

An enhanced transcript of the recording can be used to create articles that can be placed in newspapers or magazines and eventually become a book. Each of the core components can also be used in social media.

One presentation, with a little extra work, can bring more people to you in a variety of ways. That is leveraging your time and efforts.



Webinar, recording and editing resources

Popular webinar platforms include:

- **WebEx**
- **GoToMeeting**
- **Join.me**
- **TalkFusion**
- **Webinar Jam**

All are available at various price points and allow you to show slides and videos as part of the presentation. A very popular free teleseminar platform is **FreeConferenceCall.com**

The audio recording of the seminar can be edited using free software such as **Audacity**. You can offer the resulting MP3 in its entirety and/or break it up into smaller segments for redistribution.

MP3 format offers portability, small file size



An MP3 can be played on anyone's computer, smart phone, tablet, MP3 player, etc. Depending on the topic, they may pass on the MP3 to some of their friends, and your message gets out to a larger group of people who are interested in the subject. Of course, you can also post the MP3 to iTunes and other outlets that host podcasts. With the appropriate use of tags and descriptions, your podcast may be discovered by an even larger audience throughout your region or, for that matter, the world.

Additionally, you can merge the MP3 with PowerPoint slides and create a presentation suitable for your own website, YouTube or for use on a CD/DVD.

Once you've created a series of talks on various aspects of your topic, you can put them onto a CD/DVD and distribute to other prospects. When you meet a new prospect, hand them the CD. Give the CD series to current clients, centers of influence, strategic alliances, and differentiate yourself from your competitors.

The original, edited MP3 can be transcribed and enhanced with additional commentary and illustrations.

"Your podcast may be discovered by an even larger audience throughout your region or, for that matter, the world."

Transcription resources

There are some great software programs such as **Dragon Naturally Speaking** that convert audio to text. Or you could pay for professional transcription services. One simple way is to go look for transcriptionists via a newspaper ad.

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Once you have the transcript, you can create a **series of articles**. Shorter articles are generally better than longer articles and can be placed in a variety of places, including being emailed to your prospects and clients. Make sure your articles are visually appealing. People expect it. Another marketing idea is to offer shorter articles to local or regional magazines. Many newspapers and journals are looking for good, new content, and they'd be happy to have your contribution.



Your local newspaper might be able to use an article as part of a series on your topic. **This can help build credibility.**

Consider doing a series yourself. Your picture and byline shown on a regular basis can be a strong credibility booster. Again, don't forget other magazines outside the insurance and financial services category, such as parenting magazines for your local area. They are usually looking for new content and don't have the writing staff to do it all themselves.



Of course, you can take segments of any articles and create **blog posts**, which could draw people to a webinar or to your website. One speech can become one or two white papers, which can become five to 20 articles, which can be 50 to 200 blog posts. **Remember, slice and dice.**



For more in-depth content, consider writing a **white paper**. Make sure you get someone else to edit the materials. English/literature students/teachers or secretaries are often good editors and can help translate the spoken word into the written word. Again, remember that it should also be visually appealing.

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String enough articles together or combine a few white papers and you have a **book**.

Books can be very simple and inexpensive to create. You can use services such as Amazon.com to produce an electronic or print version of your book. Some printers have prices that are only slightly more expensive than some standard brochures. By the way, you can have your books printed on demand or order a few hundred copies for as little as \$3 or \$4 each.

The beauty of a book, besides providing you a potentially big credibility boost, is that people receiving an autographed copy of the book rarely throw it away. Instead, it goes into their bookshelf or on the coffee table.

Books are also great to give to strategic alliances and centers of influence. Hand two or three copies to your best clients, and ask them to give it to their friends.



Throughout this entire process, you can also post to the various **social media** sites where you maintain a presence. You can select specific target audiences or offer it to a broad range of people.

Now you are attracting people to you

It all started with simply recording a presentation that you've probably made hundreds of times. By leveraging that valuable content, you're now able to reach a potentially far larger number of people without much extra effort.

Call Sales Support at
866.322.7066
to further discuss your business.



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