



# 2019 Financial Services Social Media Content Study

OPTIMIZE THE RIGHT MIX OF CONTENT TO DRIVE CLIENT ENGAGEMENT



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Social media is a critical part of doing business today, in financial services and its various sectors as much as every other industry. In a 2018 survey of 1,021 financial advisors nationwide, Putnam Investments found that 92 percent of advisors are using social content to generate leads and gain new clients, a significant increase from just 49 percent in 2013, the first year of the study.

Now more than ever, busy advisors and agents need professional assistance in crafting a robust social media presence so they can continue to spend the bulk of their valuable time attending to their clients' needs. That's why most major financial services firms are now enlisting corporate digital marketing professionals to recommend compliant, on-brand content that agents and advisors can publish on their business social media profiles.



“Teams now grasp the power of social content to connect with customers and prospects. This year, organizations across the financial services spectrum both experimented with and refined their programs. They’re figuring out what works and evolving to meet their customers where they are. This study reflects the industry’s progress and highlights the best, most balanced social content diet in order to empower field representatives to inform, educate, and entertain their target customers, elevating their corporate and personal brands in the process.”

DONNA PRlich  
CHIEF BUSINESS OFFICER  
HEARSAY SYSTEMS



This industry content report provides new data that shows what corporate and field marketing teams – and their respective advisors and agents – are doing well, and areas they can improve.

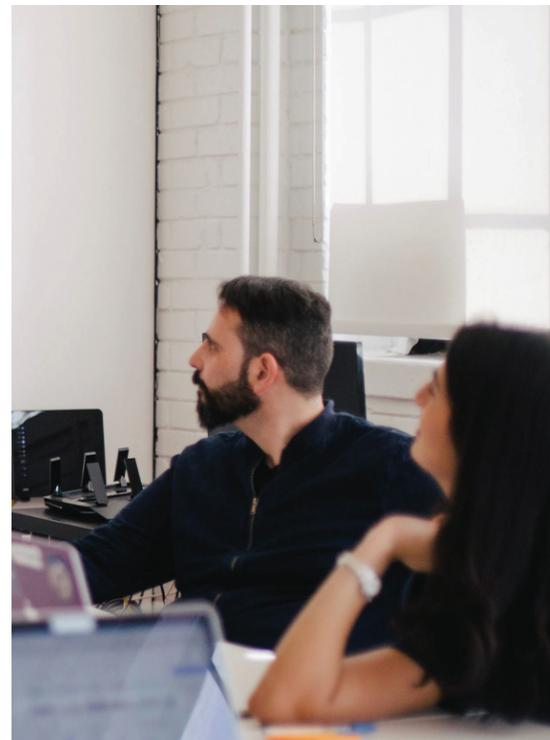
Hearsay, which provides digital client engagement solutions for more than 150,000 advisors and agents at over 150 of the world’s leading financial firms, analyzed social media publishing data from leading organizations across wealth management, life insurance, property and casualty (P&C) insurance, and – new to this year’s study – mortgage companies, to determine:

- 1 TYPES OF CONTENT SUGGESTED THE MOST TO ADVISORS** by their firms’ corporate marketing teams (lifestyle, industry, corporate, corporate-industry, corporate-lifestyle)
- 2 TYPES OF CONTENT ADVISORS SOUGHT OUT AND PUBLISHED THE MOST,** from the suggested content libraries provided by their firms’ teams (a critical indicator of whether or not corporate marketing efforts are aligned with their advisors’ actual preferences)
- 3 OF THOSE, WHICH CONTENT CATEGORIES RECEIVED THE MOST ENGAGEMENT** from the advisors’ followers (likes, comments, shares)
- 4 ACTIONABLE BEST PRACTICES AND TIPS** for corporate marketing teams to fine-tune their advisor social media programs and for advisors to free up time and improve engagement at the individual, local level



In the second year of this study, Hearsay aggregated data from 32 leading U.S. financial services firms and their cumulative 110,150 advisors and agents who used the Hearsay Social platform during the calendar year of 2018. In all, this study analyzed 34,888 corporate-suggested social media posts and over 9.6 million advisor- and agent-published posts, across the four industry segments. To provide some context in our comparative analysis, last year's study was the first of its kind and looked at data from 15 organizations across 3 lines of business during a time period of 6 months, from May-November 2017. Based on the popularity of the 2018 industry white paper and the demand from our customers for more information around this subject, we expanded this year's study to include 17 more organizations, another industry sector (Mortgage) and analyzed data from the entire calendar year of 2018 to provide a more holistic viewpoint. While the data set is considerably larger than last year, we remained consistent in our data capture and analysis across the industry sectors to ensure we weren't skewing the numbers. Hearsay's content team pulled the same reports for both years and used automated and manual classification to categorize the content in order to mitigate error margins and make this data analysis as accurate as possible. We also expanded the study to include two new types of hybrid content - corporate-industry and corporate-lifestyle - to ensure that our classification was as precise and accurate as possible.

We looked at the suggested social media content that corporate marketing teams provide for their advisors and agents, and classified them as follows: (next page - right)



### LIFESTYLE

Content designed to entertain and inform social media followers about non-financial matters, providing advisors the opportunity to show their more human, personal side (e.g., content around community events and involvement, holidays, hobbies, personal interests, etc.)

- "Happy #NationalCoffeeBreakDay! Where is your go-to place in town for a coffee break?"
- "William Shakespeare, Emily Dickinson, Robert Frost, Edgar Allan Poe, Walt Whitman and so many more great poets! Who's your favorite? #WorldPoetryDay"

### CORPORATE

Corporate-branded content that promotes the company and its products and services. (e.g., datasheets, company news, links to corporate website or affiliated publication, etc.)

- "Wow, taking a look back at the crazy year that was 2017. Crazy-amazing, that is. Why wouldn't you want to work at [company name]?"
- "[Company] Member Networks help members share and carry out our company mission. Find more about what this means."

### CORPORATE-LIFESTYLE

Content that promotes the company and its products/ services, blended with lifestyle-focused messaging (e.g., birthday wishes to clients, local or national events sponsored by the company, etc.)

- "Stop by our [agency name] office today to get some fresh baked cookies for #BakeCookiesDay"
- "Happy birthday to all of our friends born in July! From all of us at [agency name], we are wishing you a great year ahead!"

### INDUSTRY

Content that discusses and educates the audience on industry-specific topics, to highlight an agent or advisor's professional expertise (e.g. retirement planning for millennials, life insurance, small business, etc.)

- "For millions of retirees, hidden costs creep up on them. Here's a breakdown of additional healthcare costs one might face in #retirement."
- "The equity in your home could be an excellent option when financing home repairs, renovations, or other large expenses. Check out this financing guide to help you weigh your options."

### CORPORATE-INDUSTRY

Content that promotes the company and its products/ services, blended with industry-focused messaging (e.g. industry trends and news, seasonal industry posts that highlight the company)

- "Did you know that October is national #FinancialPlanningMonth? Come by your local [company name] office to chat more about your future"
- "Home improvement season is almost here. Contact me for a customized homeowners insurance policy for your new spring updates. [INSERT business phone or email]"

1

**COMPARED TO LAST YEAR, ORGANIZATIONS HAD HIGHER SOCIAL MEDIA ENGAGEMENT RATES ACROSS THE BOARD.**

This demonstrates that financial organizations are becoming savvier and that corporate marketing teams are leveraging quality, well-rounded content that appeals to target audiences while working in concert with overall corporate objectives.

2

**THE GAP BETWEEN SUGGESTED CONTENT AND PUBLISHED CONTENT RATES IS NARROWING.**

In a noticeable shift from last year's report, the types of content published by advisors more closely mirrored recommendations from marketing teams. Along with the higher engagement rates, it's clear that the closer alignment between the two is leading to more cohesive, balanced social media programs with better results overall.

3

**LIFESTYLE CONTENT CONTINUES TO BE SUGGESTED THE LEAST BY CORPORATE MARKETING TEAMS, BUT HAS THE HIGHEST ENGAGEMENT RATES FROM ADVISORS' FOLLOWERS.**

Lifestyle posts yielded a remarkable 85.5% percent rate of engagement, nearly two times the rate found in the 2017 study. This year, engagement shot up even as the percentage of suggested and published lifestyle content went down. Although marketing teams and advisors seemingly don't want to rely too heavily on lifestyle content, it's nonetheless a highly strategic tool for cultivating new leads and customer relationships.

4

**ADVISORS TEND TO SEEK OUT AND PUBLISH INDUSTRY AND CORPORATE RELATED CONTENT THE MOST.**

Industry, corporate, and hybrid corporate-industry content made up 83% of all content published by advisors. This suggests that advisors want to share corporate brand messages while being viewed as financial experts who are up-to-date on the latest industry news and seasonal trends, and look to social media to broadcast these messages to the world.

5

**HYBRID CONTENT IS THE FUTURE.**

Tracked for the first time this year, hybrid content showed tremendous potential because it allows teams to take a soft-sell approach. Advisors and agents share a corporate name brand message while also imbuing it with industry or lifestyle content. As teams adopt more sophisticated content plans, expect to see the percentage of hybrid content take off in the next few years.

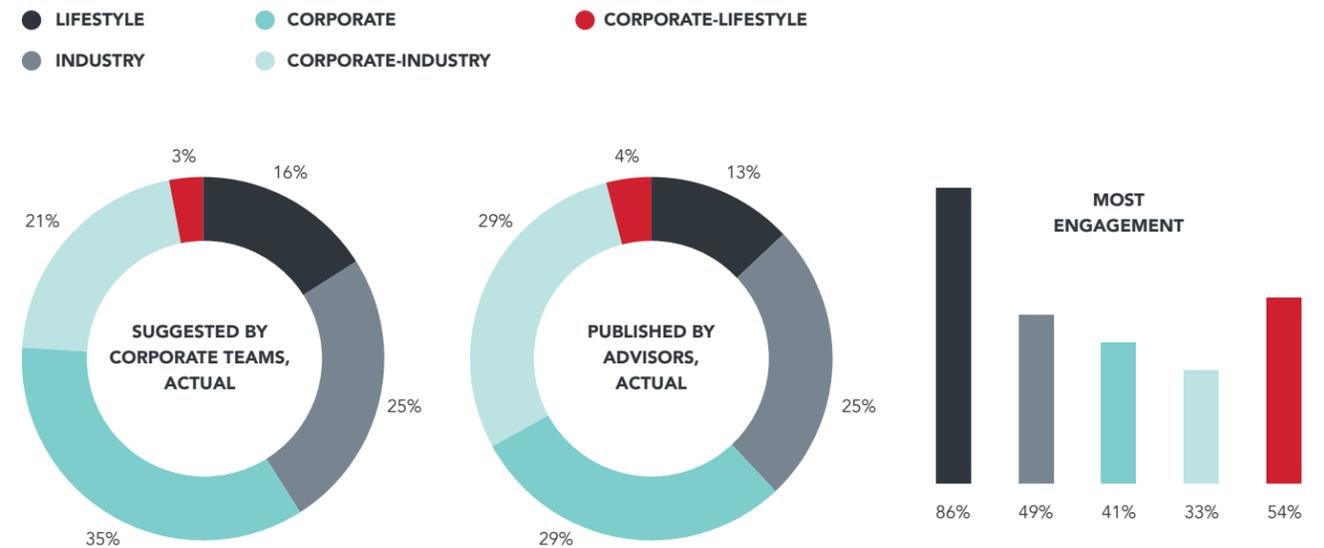
**Overall Financial Services**

BREAKING THE 70/20/10 PUBLISHING RULE

**Social Content Publishing Trends in Financial Services (Wealth, Life, P&C, and Mortgage)**

Though the publishing rates and content types differ among the various lines of business, we see that overall, corporate and corporate-industry content was shared the most by advisors and agents, while their followers engaged the most with lifestyle content. Similar to last year, corporate marketing teams suggested corporate content the most.

Breaking down the data further into the wealth, life insurance, P&C insurance, and mortgage company sectors offers additional key observations and trends that are specific to each industry segment.



# Wealth Management

A STUDY OF PARADOXICAL BEHAVIOR

## Social Content Publishing Trends in Wealth

Wealth organizations led the way with the highest amount of total suggested content compared to life insurance, P&C insurance, and mortgage companies. They still have some way to go in publishing, however: In 2017, wealth organizations had the lowest number of total publishes by their advisors, but this year came in second-to-last behind mortgage companies with an average of 137 publishes per suggested post.

Within wealth organizations, the trend of corporate and field marketing teams pushing corporate content (37 percent) and industry content (29 percent) over lifestyle content (just 12 percent) continued. Even the new corporate-industry hybrid category (18 percent) rated above lifestyle content this year, coming in third.



Overall, the data shows that lifestyle content received the highest engagement from advisors' followers (125 percent, the second highest of all engagement rates in the study) but the lowest publishing rate (as discussed above). Industry content, however, had the lowest engagement (40 percent) and the highest publishing percentage (42 percent) and the highest relative publishing rate (an average of 202 publishes per suggested post). Corporate-lifestyle content also showed a high engagement rate, though very little of this hybrid content was suggested or published by wealth organizations. The more that wealth organizations can use data to develop their strategy and thereby create content that fits what the audience wants and puts an innovative and engaging spin on strict corporate-branded or industry content, the better.

The interest in lifestyle content, both from advisors and their followers, highlights the fact that the advisor-client relationship within the wealth management sector is a highly personal one. Prospects and clients are most interested in engaging with their wealth advisor as a person, not as a brand. Followers of wealth advisors clearly enjoy seeing what is happening outside of the confines of work, and advisors need to give them a view into their own personal interests.

### HOT TIP: WHAT'S WORKING

#### Real-time content.

**Since a personal, trusted advisor relationship is paramount to wealth clients, it's essential for advisors to both educate and offer reassurance that they're always looking out for their clients' best interests.**

For example, during the calendar year of 2018, the dramatic volatility of the market led many investors to worry about their investments and whether they should ride out the storm or make significant changes to their portfolios. 2018 was a disappointing year for many investors not just because the S&P 500 declined for the first time since 2008, but because many other financial markets fell as well. The ups and downs of the market made financial news headlines and generated enormous interest in the investment world.

In our analysis, the terms "market volatility" and "long-term plan" were two of the most popular content library search terms with wealth advisors. In addition to the search terms around market volatility, the most popular terms for wealth managers in 2018 included "child gifting," "rollover," "tax reform," and "dividend."

Hybrid corporate-industry and corporate-lifestyle content gives financial advisors the chance to share important corporate and industry information to provide reassurance and reminders in volatile times. These types of posts can help inform customers before speaking with their advisors in detail about their portfolios:

- "Our annual report provides 10 key numbers about 401(k) retirement plans, the centerpiece of retirement savings for many Americans."
- "Our quarterly recap shows that while rising interest rates are a sign of a strong economy, they bring potentially higher costs for borrowers. However, they also present an opportunity for savers as rates will likely continue heading slowly upward. Get in touch if you want to chat more!"

Since markets are in a constant state of flux and both bull and bear markets can create questions for investors, corporate marketing teams can get ahead of the curve by having a constantly refreshed feed of timely news content from well-known, trusted media sources.



Source: Hearsay Social Media Content Benchmark Study, 2019

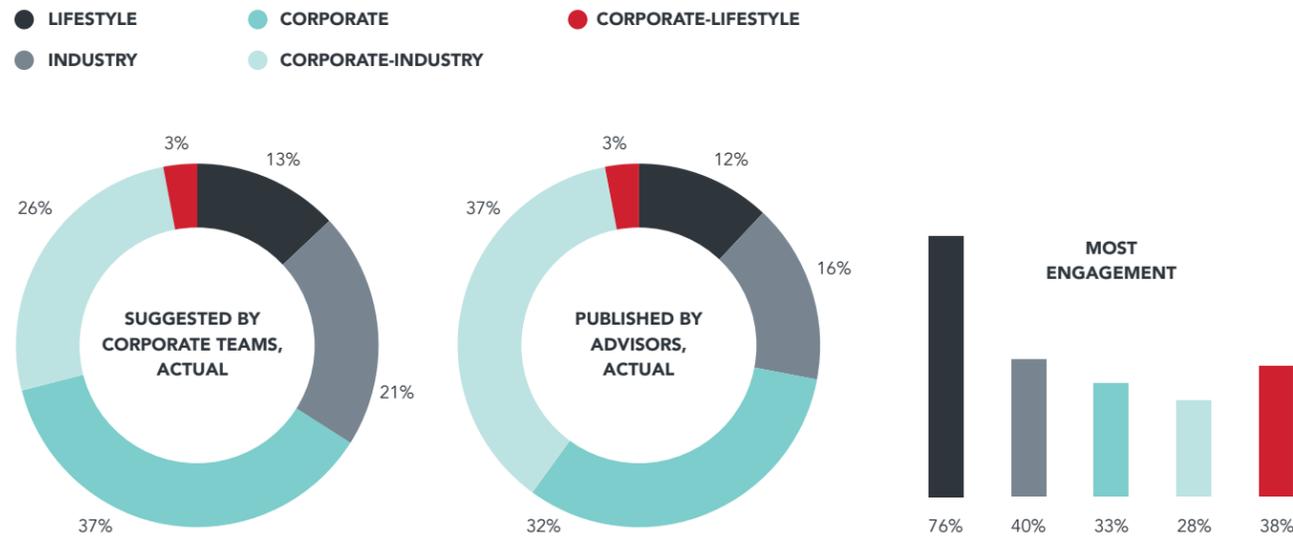
# Life Insurance

## RISING THROUGH THE RANKS

### Social Content Publishing Trends in Life Insurance

Similar to last year's data, corporate and field marketing teams within life insurance organizations offered a well-balanced blend of recommended lifestyle, industry, and corporate social media content to its advisors. This year, however, there was a decrease in lifestyle content and an increased focus on industry, corporate, and hybrid corporate-industry content. Among all industry segments, life insurance marketing teams suggested the second lowest amount of lifestyle content (13 percent).

While corporate teams increased their industry content recommendations, there was a marked decrease in publishing rates for that content as compared to last year, dropping from 42 percent to 16 percent. Instead, life insurance agents favored corporate (32 percent) and corporate-industry (37 percent) content over other content types, even though engagement rates for these types of content were the lowest. Advisors published industry (16 percent) and lifestyle (12 percent) content at low rates, but garnered high engagement for these categories among followers demonstrating once again a mismatch between what is being shared versus what the audience wants.



In 2017, life insurance advisors were in the middle of the pack in terms of social media activity. This year, they continue to hold the middle ground in the second spot just behind P&C Insurance, with an average of 322 publishes per suggested post. The even balance of suggested and published content demonstrates that corporate marketing teams in life insurance continue to be well-aligned with their advisors, and that their advisors are doing a good job of sharing a diverse mix of content to their social networks. Overall, life insurance organizations continue to provide a comprehensive approach to their social media strategy, publishing the second most content (3,695,889) and achieving the second-highest number of total engagements (1,385,101) across all content types.



### HOT TIP: WHAT'S WORKING

#### Evergreen Industry content.

Life insurance agents tend to lead with evergreen industry content that is focused around the business, like information about products and services, referrals, and answering top-of-mind client questions and concerns. The most popular content library search terms with life insurance agents were "whole life insurance," "term life insurance," "529 plan," and "child gifting".

Hybrid corporate-industry and corporate-lifestyle content allow life insurance companies to share important industry and corporate news with a less heavy-handed approach. These types of posts can be evergreen or seasonal in nature and provide helpful hints to customers that may remind them to get in touch with their life insurance agent, to revisit their existing policies or talk about new opportunities as important life events happen:

- "It's National 529 Day! We'll breakdown three tips that will get you on the road to start planning for your child's future education."
- "The holiday season is upon us. Give your child a financial head start by giving the gift of a lifetime."

Corporate marketing teams can help their agents save time by pulling vetted content around popular themes like kids and money, wealth transfer, and millennials and money from well-known, respected news organizations, company blogs and personal finance sites.



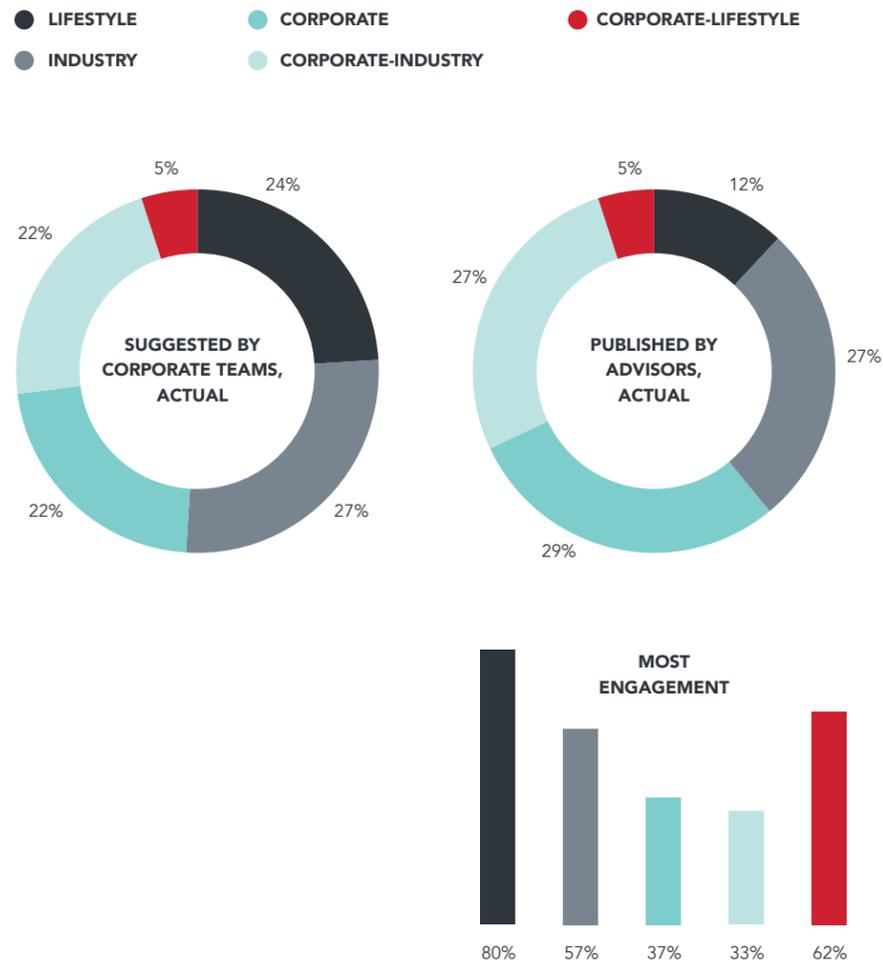
# P&C Insurance

LEADING THE WAY WITH AN ENGAGING HYBRID MODEL

## Social Content Publishing Trends in P&C Insurance

For the second year in a row, P&C insurance set the standard for overall social media activity across the sectors we analyzed, with agents publishing the highest volume of content (an average of 577 publishes per suggested post) even though P&C marketing teams provided half the amount of the content as wealth management or life insurance teams. In addition, P&C agents received the highest number of total engagements (1,842,458) across all industry sectors.

P&C agents also published content at the most balanced rates compared to the other industry sectors, with corporate (29 percent), corporate-industry (27 percent), and industry (27 percent) content all coming in at almost identical rates. In the corporate-lifestyle category, P&C Insurance had the highest amount of suggested content (5 percent), and the second highest engagement rate (62 percent).



### HOT TIP: WHAT'S WORKING

#### Seasonal content.

Given the nature of the products they sell, content around natural disasters and protecting one's real estate and automobile investments is central to P&C insurance firms and agents. The top content library search terms with P&C insurance agents in our analysis were dominated by seasonal topics like "storm," "flood," "earthquake" and "wildfire," as well as holidays and special occasions (e.g., "Labor Day," "graduation," "Thanksgiving").

Hybrid corporate-industry and corporate-lifestyle content works well to align products with lifestyle activities. These types of posts can provide helpful hints to customers that may remind them to check in on their existing policy or plan, especially when it comes to upgrading or bundling services:

- "Road trips are a great way to see more of Canada. Make sure your car is ready for the road by checking these common problem areas before you go."
- "Your car really takes you places, but bundling your home and auto policies will take you pretty far, too. Call me to learn how much your bundle can save!"

Since many of these types of events are recurring or affected by seasonal shifts (more road trips in the summer, more severe storms in the spring), P&C insurance marketing teams and agents can save time by queueing up seasonal content in advance, so they can be quickly published both before and after these events occur.

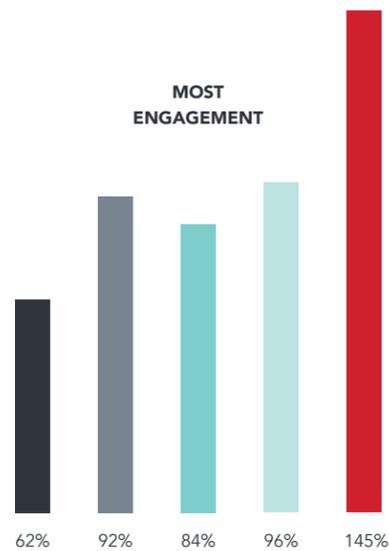
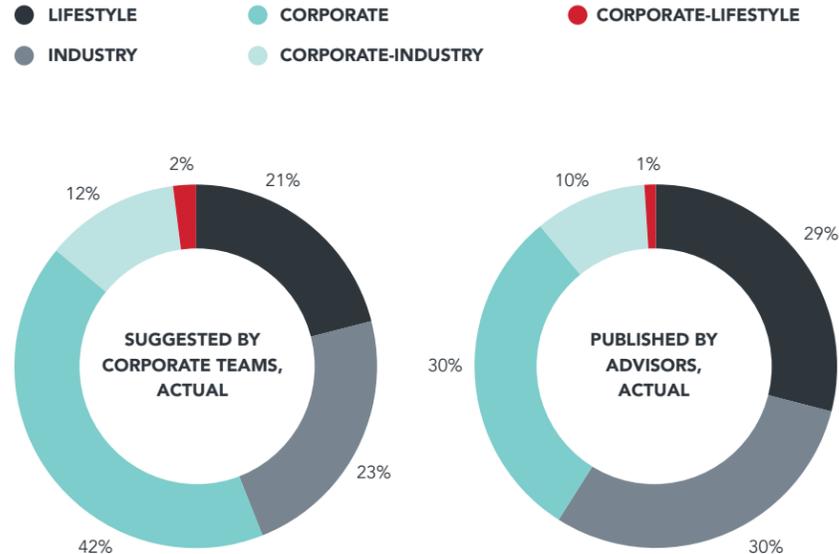
Unlike wealth and life insurance, P&C insurance agents operate in a world with a highly commoditized range of products; policies are fairly competitive from one company to the next, and consumers are able to do much of their research online. In order to differentiate, P&C insurance firms invest significantly in generating awareness and trust at the brand level, as well as building a cohesive corporate-to-local experience.

As a result, many P&C insurance companies use a hybrid model for their social media content strategy that more heavily promotes branded, corporate content, even at the local agent level. The engagement rate for corporate content dropped from first place to fourth, just slightly above life insurance, but that may be due to the number of times the same content is published by agents in large insurance companies. P&C agents publish content at nearly twice the rate of life insurance agents, four times the rate of wealth managers, and nine times the rate of mortgage loan officers.

# Mortgage Companies

## NEW KIDS ON THE BLOCK

In the first year looking at mortgage companies and their use of social media, the numbers show a more even distribution of suggested content across lifestyle, industry and corporate. Though there was a significant focus on corporate content, mortgage companies suggested the second highest amount of lifestyle content after P&C insurance. Significantly, the engagement level for corporate-lifestyle content was 145 percent – the highest of all engagement rates in the study. Yet hybrid content (corporate-lifestyle) was recommended at only 2% and published at only 1%. This suggests that both corporate marketing would benefit from reevaluating their content creation and suggestion strategy, as well as educate the field on this potentially valuable content category. It's interesting to note that mortgage loan officers published content at an almost exact three-way split between lifestyle, industry, and corporate content.



## HOT TIP: WHAT'S WORKING

### Evergreen industry content.

Mortgage loan officers tend to do well with evergreen industry content that is focused around the business. This can include information about products and services, referral and recruiting information, as well as answers to top-of-mind client questions and concerns. The most popular content library search terms with mortgage loan officers were "refinance," "HARP," "mortgage calculator," and "first-time home buyer".

Hybrid corporate-industry and corporate-lifestyle content allow mortgage companies to share important industry and corporate news in a helpful manner. These types of posts can be evergreen or seasonal in nature and provide educational content to customers while encouraging them to get in touch and discuss their options as they move through the home-buying journey:

- "Thinking of buying a home, but not sure how to get started? Don't worry, I'm here to help with a free consultation. We can review your information together and explore which home financing options make the most sense for you. Contact me today!"
- "HARP has been extended through December 31, 2018. With the government's Home Affordable Refinance Program, you may be able to reduce your monthly mortgage payment or shorten the term of your existing mortgage. Check out my site for details and contact me to find out if you qualify!"

Corporate marketing teams can help their loan officers save time by creating helpful content around popular themes like refinancing and first-time buyer programs and by pulling vetted content from well-known, respected news organizations, and personal finance sites.



A major trend that we identified in last year's study was the importance of financial services firms leveraging automation and industry-specific technology to make it easier to publish the right content, at the right time.

## Automated Publishing

In a recent survey of our users, we learned that the average advisor wants to spend about 5-10 minutes per week managing their digital marketing. Hearsay built Campaigns so advisors could instantly launch automated social media marketing campaigns, and marketing teams could easily get the majority of their advisors to use social media effectively. These campaigns are easy to use for both marketing teams and advisors, reduce the amount of time advisors need to spend on their social efforts, and provide a strong supplement to custom and modified-content efforts.

### AUTOMATED PUBLISHING & ENGAGEMENT RATES

Across the industry, engagement rates increased by 7%. This increase occurred even as most firms began to offer, and often focused on, automated publishing. While original and modified content often generates higher engagement rates, it's important to highlight this shift to automated publishing didn't result in decreased engagement. This is a testament to marketers creating high-quality, well-rounded content strategies — delivered through Campaigns and the Content Library.

### AUTOMATED PUBLISHING & SUPERVISION ALERTS

In 2018, total posts published increased by 29%. This increase is of course driven largely by the industry's rapid shift to automated publishing. Over the same time period, alerts created by posts (not profiles) decreased by 46%. That is a significant decrease in alerts and a huge efficiency gain for supervision teams. While there are a number of factors driving this reduction in alerts, the fact that advisors are automatically publishing content that is already compliance-approved is paramount.

## Hearsay Content

Recognizing the need for more engaging industry and lifestyle content across all industry sectors, we built Hearsay Content to help organizations enrich their content strategy and save time curating content. Hearsay Content helps you diversify top-of-funnel content and makes it easy for advisors to nurture clients and prospects one-on-one.

### HEARSAY CONTENT CHANNELS

With Content Channels, advisors and agents can build trust and credibility by selecting from a combination of pre-populated industry and lifestyle recommendations, leveraged from nine years of data insights pinpointing the most engaging content for financial service organizations. Content feeds are updated daily from trusted sources such as Forbes, Wired, and The Economist to ensure the information stays fresh and relevant.

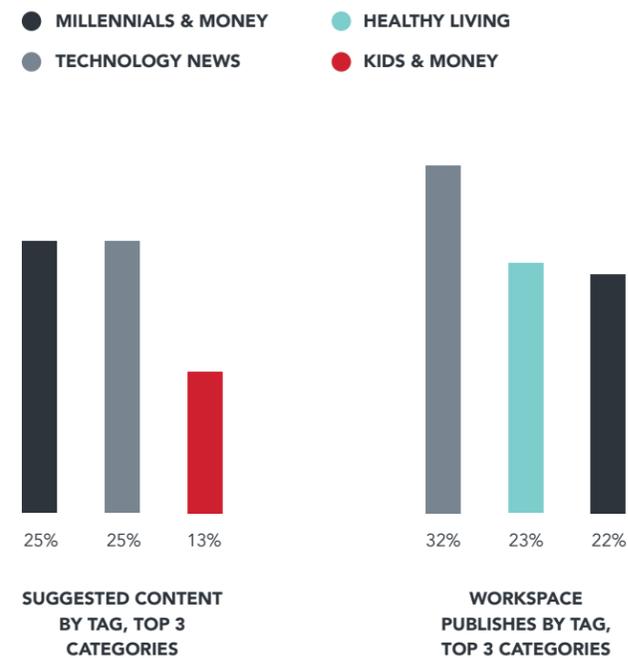
### HEARSAY CONTENT CAMPAIGNS

Hearsay Content takes Hearsay Social's Campaigns — automated publishing for advisors and agents — one step further by providing Pre-Built Campaigns for lifestyle and other content. Content is automatically added each week from trusted sources like TechCrunch, Fortune, Bloomberg, and more. The campaign is created for you and you can review, add, or remove content before you share with your advisors and agents.

The goal of Campaigns is to drive adoption.

## By the Numbers: How Hearsay Content is Solving Client Needs

Since Hearsay developed and launched Hearsay Content last spring, subscribed advisors have published over 75,000 pieces of cumulative content in over 2,900 workspaces. Firms are able to save time and reduce the need to seek out content by using curation tools that automatically deliver timely, relevant industry and non-industry content from well-known, respected news outlets and websites. A further breakdown of data showed:



"In today's work environment where there are simply not enough hours in the day, Hearsay Content has created efficiencies for our marketing department by providing the most relevant industry content our advisors want to share with their clients and prospects. Hearsay Content complements our existing corporate content (such as articles, market outlooks, and guides), allowing advisors to be seen as experts in their field without feeling like every social post they share is coming from the corporate office. We look forward to integrating Hearsay Content into our campaigns to make our advisors even more productive by effectively managing their social publishing needs."

SHARIF RENNO,  
VP, SOCIAL MEDIA  
ROBERT W. BAIRD & CO.



**For any financial services organization** social media is just one part of the overall social content story. Marketing teams and their field forces should be leveraging other digital communications channels in addition to social media, such as email marketing, website lead generation, and compliant texting to ensure that they are meeting their clients on the channels they prefer.

#### HEARSAY RELATE

Hearsay Relate offers admins and advisors voice and texting tools that provide compliance oversight, eliminating inappropriate or risky text messages before they are sent to clients.



Digital experiences are creating a more informed, self-directed consumer – one who relies less and less on traditional sources of advice that once could only take place face-to-face or over-the-phone.

#### BY THE NUMBERS: HOW ADVISORS ARE INTERACTING WITH COMPLIANT TEXTING

- 4,884 workspaces are texting
- Advisors and agents across all organizations have sent a total of 861,359 text messages
- Advisors and agents have received a total of 1,054,935 texts
- The average response time to a text is 3:56 minutes (Q4 of 2018)
- Best time(s) of day to send messages:
  - 12pm-8pm ( 90%+ response rate)
  - 9pm-11pm (80%+ response rate)
  - 7am-10am (70%+ response rate)

#### HEARSAY SITES AND MAIL

In addition to Relate, advisors and agents can leverage other channels to engage with their clients. Hearsay Sites, provides customized, compliant websites for advisors and agents, and Hearsay Mail allows marketing teams to leverage templated emails for their advisors and agents to send to their clients.



# 4,884

**WORK SPACES ARE TEXTING AND HAVE SENT A TOTAL OF 861,356 TEXT MESSAGES**

Source: Hearsay Social Media Content Benchmark Study, 2019



Based on these findings and Hearsay’s industry expertise and focus, corporate marketing teams and their respective advisors and agents can take their social media efforts to the next level by implementing the following best practices:

## Share more lifestyle content.

Though lifestyle content is suggested (16 percent) and published (13 percent) at relatively low rates across the industry, it continues to have the highest engagement rate across all lines of business (86 percent), making it clear that clients and prospects want to see lifestyle content from advisors and agents. Positioning oneself as an interesting and relatable person – versus someone trying to sell a product or service – sets the foundation for the authentic, trusted advisor-client relationship that is critical to advisor and agent success. Some ideas include:

### POPULAR TRENDS

- Motivational Monday
- Tip Tuesday
- Throwback Thursday
- Funny Friday

### HOLIDAYS

(OBVIOUS & OBSCURE)

- National Donut Day
- Pi Day
- National Siblings Day
- May the Fourth Be With You

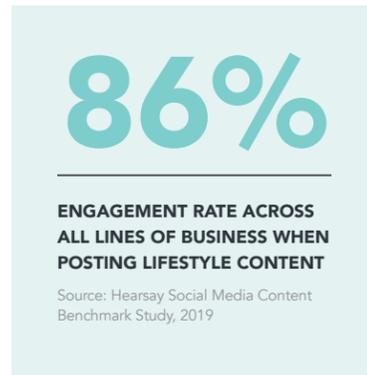
### OCCASIONS

- #SevereWeather Preparedness
- Breast Cancer Awareness Month
- #[company]cares

## Put an entertaining, engaging spin on industry and corporate content.

Advisors want – and need – a variety of industry and corporate-related content so that they can establish and reinforce their thought leadership and expertise in financial matters. The hybrid categories in this year’s study show just how important variety is in terms of keeping content fresh and engaging. Many, especially in the P&C insurance space, benefit from the brand awareness and brand equity that their firm invests heavily in. But what is the best way to break through the noise? By framing posts in a way that entertains or provides a local context, marketing teams can help their advisors and agents make the content they publish more engaging and relevant. Some ideas include:

(next page, right)



### LISTS AND HOW-TOS

- “3 things to do before setting up a 529 college savings plan.”
- “Thinking of buying a home, but not sure how to get started? These five tips will help you get started with exploring which home financing options make the most sense for you.”

### “WHAT” POSTS

- “Have you heard the term “hazard insurance”? Here’s what that usually means. Let me know if you have any questions!”
- “Current events have had major impacts on #oil prices. What does that mean for your #portfolio?”

### “WHY” POSTS

- “Why is September my favorite month of the year? It’s Life Insurance Awareness Month! Do you have enough life insurance to help you support your loved ones’ financial future? The [company] life insurance calculator can help you estimate your needs.”
- “Quality growth funds: 3 reasons why your clients should consider them now.”
- “Did you know that May is Deck Safety Month? Here’s why you need to inspect your decks every season:”

### OPEN-ENDED QUESTIONS

- “What’s the most valuable financial lesson you’ve learned?”
- “Happy Thanksgiving from [company]! What are your favorite fall family traditions?”
- “It’s Friday the 13th. What were some of your favorite superstitions growing up?”

### PERSONAL STORIES

- Success stories from real-life customers to highlight the human aspect of the work the company or advisor does.
- Human interest stories that show the interests and hobbies of company employees outside of their day-to-day job

### INSPIRE

- Share inspirational quotes, humorous or entertaining content that inspires followers to react and engage.



Leverage automation and industry-specific technology to make it easier to publish the right content, at the right time.

Save time and reduce the need to seek out content by using curation tools like Hearsay Content that automatically deliver timely, relevant industry and lifestyle content from well-known, respected news outlets and websites.

Eliminate the biggest barrier to social media success – advisors’ lack of time – by using Campaigns that automatically publish compliant posts on your advisors’ behalf. Hearsay Content includes three pre-built dynamic campaigns to help you get started:

**TECH TRENDS**  
**HEALTHY LIVING**  
**MILLENNIALS AND MONEY**



“Hearsay’s Dynamic Campaigns help automate publishing for advisors, ensuring they continuously stay top of mind with their connections. Campaigns make it easy for advisors to be active without having to do the legwork of actually “being active.” They also provide the admin team the ability to push out and publish content fairly effortlessly and are great for organizing and adding content on an ongoing basis, along with insights that allow admins to determine the strategy of what content should go out at what exact time.”

MARK TEOFILO,  
SOCIAL MEDIA CONSULTANT, CIBC

Maintain an open dialogue between corporate marketing teams and the advisory field.

All too often, advisor social media initiatives fail because of a lack of communication and input between corporate teams and the field. As our data confirms, what the corporate marketing team believes to be useful content for advisors and agents is not always the case. The following suggestions will help to ensure corporate priorities and advisor needs are aligned:

#### DEPLOY REGULAR FIELD SURVEYS

Don’t know if a particular type of content or theme is resonating with the field? Ask them! Consider incentivizing surveys to increase participation.

#### HAVE CLEAR SOCIAL MEDIA GUIDELINES

A simple one-pager that states what advisors and agents can and cannot do on social, especially when it comes to lifestyle content, will increase the odds of activation and success.

#### ALLOW ADVISORS AND AGENTS TO MODIFY SUGGESTED CONTENT, OR CREATE THEIR OWN

Hearsay data shows that modified and custom content receives 4x the engagement rate over content where the field is not allowed to modify or personalize.



As we've seen in the last two years of this study, simply enabling advisors to publish content on social media is not enough. However, for many advisors and firms, the extent of their social media strategy often ends with basic publishing, and provides little visibility into what types of content are actually resonating.

There is an enormous opportunity for corporate marketing teams – those who know marketing best – to use automation technology that allows them to publish the right mix of content on their advisors' behalf (while still preserving authenticity), to increase top-of-funnel awareness and generate demand at scale. It is also crucial that corporate marketing teams help their field force to use all of their digital channels in concert to meet their clients and prospects where they are. Advisors and agents can save time and then focus their efforts on what they do best: high-value, bottom-of-the-funnel activities that drive client retention, upsells and referrals. Firms and advisors who build their businesses around being both high-tech and high-touch will be in the best position to succeed in today's digital-first world.



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Find out how Hearsay can help your advisors grow business compliantly:

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#### ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the client experience in Wealth Management, Insurance and P&C with compliant digital communications and workflow solutions. Over 150,000 advisors and agents at the world's largest financial services and insurance firms leverage Hearsay to engage with customers and build stronger relationships to grow their business.

With Hearsay Cloud for financial services, advisors and agents provide real-time, personalized and seamless client experiences across the right channel - social, texting and mobile - at the right moment. Automated, pre-built industry workflows for insurance and wealth management provide one-click actionable suggestions for targeted engagement. Built for the enterprise, Hearsay Systems connects data and every client interaction to corporate CRM systems and digital marketing programs – all on a secure, compliant enterprise-ready platform.

Hearsay is headquartered in Silicon Valley with locations throughout North America, Europe and Asia. Connect on [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#).

#### ABOUT PREMIER SERVICES

Hearsay's Customer Success team provides a wide range of resources to help financial services organizations find digital client-engagement success. Our team assists our customers at every step of the digital journey, from solutions delivery to account management, offering in-depth training and education, and live customer support for all of our digital solutions. With our exclusive focus on financial services, we have the data and expertise to craft best practices, benchmarks and assessments that are validated by the industry. To learn more about Hearsay's Customer Success team and how our consulting services and expertise can help your business, contact us!

