



LEGISLATIVE & WORKING GROUPS SUMMIT | WASHINGTON, DC FEBRUARY 8-11, 2016

Marketing & Communications Working Group

EXECUTIVE SUMMARY

The main topic of discussion for the Marketing & Communications Working Group was crisis communications. Your Communications Team needs to be looped into every aspect of your organization. It's about the way you handle these communications and the actions you take that define the outcomes. The group participated in three tabletop preparedness exercises facilitated by LEVICK's Jason Maloni and Samantha Kruse. Participants were instructed to treat the tabletops as real events, encouraged to participate openly and ask questions, and keep response objectives in mind.

PARTICIPANTS

ABD Insurance and Financial Services
Acrisure
AHT Insurance
Assurance Agency, Ltd.
BancorpSouth Insurance Services Inc.
CBIZ Insurance Services
Flood and Peterson
Fringe Benefit Group
Gehring Group, Inc.

Hauser Insurance Group
Heffernan Group
INSURICA
Jones Brown Inc.
Kelly & Associates Insurance Group Inc.
Lipscomb & Pitts Insurance, LLC
Lockton, Inc.
MDS Holdings
Mercer Health & Benefits

MJ Insurance, Inc.
Murray Securus
RCM&D, Inc.
The Crichton Group
The Leavitt Group
Warner Pacific Insurance Services, Inc.
Wells Fargo Insurance Services

CRISIS COMMUNICATIONS

FACILITATED BY LEVICK

Highlights

- Crisis Communications involves everyone – CEO, IT, Communications, Legal, HR, Science/Research, etc. – the whole team/organization. If you attack the problem as a group, the situation will be better
- Plans are great, but teams are more important- smart people working together quickly with a set of protocols is your best approach
 - Who's in the room?
 - What's the timetable?
 - Who does it affect?
 - Rapid response, smart thinking
 - Speed is paramount
 - Action helps you recover from bad situations (and people will remember what you did or didn't do)
- Effective responses are clear and thorough, compassionate, responsive, aggressive and transparent
- Communicate the facts: What happened? How are you fixing it? What do I need to do to be safe? What is being done to prevent future incidents?
- Don't overlook your internal audience, employees
- Don't treat every situation as a crisis, otherwise you will risk exhausting your resources

- Best practices post incident: Be the hero not the villain, generate champions, focus on the metrics and declare the crisis over

DAY TWO

JOINT SESSION WITH CIO WORKING GROUP

On Day Two, participants of the M&C Working Group gathered with members of the CIO Working Group to explore how both departments can work together and create a more client-centric experience by combining technology and marketing. Marketing & Communications professionals have the potential to create a major advantage to agencies through the use of digital marketing tools, so it's important to know how to incorporate technology into their work on a day-to-day basis.

Highlights

- 70% of an organization's brand experience is delivered through technology resources
 - As technology drives the customer interaction, the relationship between IT and Marketing must evolve; there is great potential for a much stronger integration between the two
- Agency Management Systems are not the only source of data
 - It's how data is used that helps to distinguish your firm in the marketplace
- Technology now drives many marketing strategies and there's much overlap in the intersection of responsibilities to drive revenue, increase efficiencies and retention and spearhead innovation
- In 2011, approximately 100 companies existed in the marketing technology landscape
- In 2015, approximately 1,876 companies are on the scene (excluding software)

Discussion

Several participants shared how they are attempting to bridge the gap between the two functions and talked about how their priorities could be accelerated or navigated with a stronger partnership.

- How are you using technology to better understand your customer?
- How do your teams glean intelligence/behavioral data that marketing is translating into business opportunities? Do you feel like you have enough data?
- Are you investing in dashboards or portals for your clients? How is engagement being measured in the acquisition or development phase of the tech process? What are success metrics?
- Is your next technology investment going to move the needle? How do you know?
- Who is your next hire? What are the skillsets of the technologists that can bridge your two areas? Is there a possibility of that new hire to sit in between marketing and information technology?
- Where's the next big idea coming from? Who is driving the change?
- Who's close to having a single client record?
- Many marketing teams (at member firms) are currently using marketing automation to drive leads, increase retention and generate business. How are these resources being vetted and do they integrate with your current technology platforms or are we just layering on top of it? Is there redundancy in data or could we be culling data/intelligence from multiple sources within IT and marketing operations? When thinking of automation strategies, what are you hoping for?

Peer Share

- One firm is launching a **Technology/Marketing Steering Committee**. One of their initiatives is to map all the technology used by the firm, assess how it fits in their enterprise architecture and the goals for its use. There are five guideposts that will be identified for outcomes. Technology ownership will be spread across the organization for more effective utilization and ROI.
- Another firm created an **Innovation Committee** to drive new initiatives around technology and customer engagement. (Teams from Marketing, IT, Sales and others)

- A single sign-on Client Portal being developed that provides complete access to all the firm's resources and information to enhance the customer experience.
- Marketing has been an “art,” but now science is creeping into the mix because of the intelligence/data needed to make decision. Technology has been a “science,” but now need to incorporate the “art” of enhancing customer engagement.

NEXT MEETING & FUTURE TOPICS

The next Marketing & Communications Working Group meeting will take place November 2-3 in Washington, D.C.

Topics for future discussion included:

- Marketing Automation Review: Strategic review of your firm's marketing campaigns
- Opportunity for IT integration to capture even more behavioral intelligence; a look at firm's digital footprint
- Content Marketing Platforms: Are they driving engagement? Strategic goals and assessing ROI
- Managing the IT/Marketing Integration: How do we manage this change? What does it look like?
- Crisis Communications follow up strategic planning: What do your plans look like? Real firm experiences – what worked and lessons learned
- M&A Brand Integration/Marketing Initiatives: Share launch, challenges and then review six months later (use the M&C Working Group to review your plans, lessons learned, resources used, etc.)

QUESTIONS?

Contact Susan Rushford at susan.rushford@ciab.com.