



April 8 - 9 | Washington, DC

“Marketing is not a department, but a way of thinking across the agency.”

And with that, The Council of Insurance Agents & Brokers' inaugural Marketing & Communications Working Group kicked off.

Held April 8-9, 2015, at The Council's newly renovated headquarters in Washington, D.C., the working group was staffed by The Council's Marketing & Communications team: Susan Rushford, senior vice president; Brianne Spellane, director; Juan Mata, creative marketing associate; Meg Wroe, project coordinator; and Aesah Lew, digital engagement strategist. The group focused on attendees' respective successes and challenges and were brought up to speed on the Council resources at their disposal.

PARTICIPATING FIRMS

Twenty (20) participants from the following member firms were in attendance:

- Acrisure
- Assurance Agency, Ltd.
- Britton Gallagher
- CBIZ Benefits & Insurance Services
- Conner Strong & Buckelew
- Cottingham & Butler, Inc.
- Flood and Peterson
- Frost Insurance
- Heffernan Insurance Brokers
- INSURICA
- J.W. Terrill, Inc.
- Lipscomb & Pitts Insurance, LLC
- Murray Securus
- NFP
- Oswald Companies
- RCM&D, Inc.
- Senn Dunn Insurance
- William Gallagher Associates

EXECUTIVE SUMMARY

Creativity around branding and marketing is raising the bar across all industries; marketing is not only driving the customer engagement experience, it has become the champion of the customer experience. However, too many executives look at marketing as just another expense on their balance sheets rather than the revenue generator it has the great potential to be. This was the impetus behind the creation of The Council's Marketing & Communications Working Group.

Council President/CEO Ken Crerar addressed the group, expanding on the point that brokerage firms have a vast opportunity to build their brands, and underscored the value of the working group's structure and peer-to-peer exchange. Crerar talked about how and why The Council's award-winning industry publication *Leader's Edge* was born, and the thinking behind its sophisticated yet entertaining voice. Today, *Leader's Edge* has become our strongest marketing vehicle and a solid platform for the voice of leading commercial brokerages worldwide.

There was a presentation about the "Shift from selling to storytelling – making your content marketing more conversational," and discussion followed. Other topics focused on maintaining brand equity among varied offices, departments and verticals, as well as innovating around technology and establishing attainable expectations among leadership.

“Your brand is a story unfolding across all customer touch points.”

**Jonah Sachs,
Author & Entrepreneur**

WHO WE ARE

“Creativity is intelligence having fun.”

Albert Einstein, *The Original Einstein*

Participants introduced themselves using pre-selected magazine ads, brands and images that they most relate to in both their business and personal lives. Let's just say we had more than one wine connoisseur!



ROUNDTABLE DISCUSSION

The crux of the working group focused on members' various successes and struggles – things that have worked well and things that they're having difficulty getting a handle on. These issues sparked insightful discussion, peer-to-peer exchange on best practices and experiences, and topics for the group to consider at future working group meetings. Below is a snapshot. For a complete list, go to our Basecamp page.

STRUGGLES

- Adopting and integrating new technologies into firm
- Building education around using a CRM and using it consistently
- Being more consistent across the brand, especially the customer experience
- Transitioning and creating brand consistency with acquisitions
- Being pulled in different directions (in general, but particularly as a small shop) especially with the dance between a firm's internal needs vs. external marketing initiatives
- Meeting marketing needs for branches in different regions
- Communicating value of investing in marketing to leadership
- Convincing producers to share information and expertise to a wider audience

“The real future of marketing starts with putting your hands up and walking away for a minute.”

Brian Solis, *Principal Analyst, Altimeter Group*

SUCCESSES

- Digital Strategy: Oracle Marketing Cloud/Eloqua used for prospecting and digital intelligence; personalization is working (Assurance)
- Putting a face to marketing with different departments / video calls (Heffernan)
- Building out centers of influence and leveraging existing partnerships (WGA)
- Tied rewards and incentives to using CRM; more motivating than using compensation (Senn Dunn/MMA)
- Breakfast Club brings businesses and firm together; prospects are invited and get to know producers. Shows commitment to the community (Lipscomb & Pitts)
- Clients telling their stories on video. Using stories to also motivate internally (Cottingham & Butler)
- Creating dynamic intranet to strengthen internal communications (Acrisure)
- Changing corporate name to leverage national branding (NFP)

THE SHIFT FROM SELLING TO STORYTELLING

HOW TO MAKE YOUR CONTENT MARKETING MORE CONVERSATIONAL

Presenter: Leigh George, PhD, Branding, Digital Marketing and Social Media Strategist
leighgeorge@gmail.com or follow her on Twitter @LeighGeorge

Find an area where there's internal interest and external opportunity and build around it.

Social media platforms, email inboxes and the web are clogged with an endless stream of messages where brands must compete for attention. In a landscape where it's nearly impossible to get in front of your audience without paying for the privilege, how do you get clients to seek out your content? And how do you engage back with them?

Leigh George's presentation used various case studies and offered actionable insights into effective content marketing today, including major focus on the role a firm's brand plays in the stories it tells.

TAKEAWAYS

- Owning the customer relationship is much more than managing the brand. What experience are you creating?
 - The customer experience should be seamless for the customer across the company. Achieving this is a challenge.
 - A brand is the space you occupy in the mind of others. Other people determine your brand, not you (customer reviews, word of mouth, etc.)
 - Is the thought leadership you create more about you or more about what your customers care about?
 - Simon Sinek's Golden Circle: emphasize your WHY
 - ▶ Does your firm offer a why? A unique promise in value?
 - Shift your thinking from content that's about you to content that's about your client (customer-centric storytelling).
 - Seek out opportunities where your content is welcome vs. interruptive.
 - Tell emotionally-driven personal stories (instead of clinical analysis of an issue); client-based storytelling to relate to your products and services.
 - Capitalize on the content you have (try interviewing your producers, gather some key points and write it up).
- Templates are a great way to make the content process more efficient. Also –
 - ▶ Think about the way you deliver your content.
 - ▶ Is it quick and easy?
 - ▶ Do people want long narratives?
 - ▶ Think about their time and situation, visual vs written information - Make their lives easier – help them focus on what's important
 - Measurement needs to come at the beginning so you can accurately measure progress
 - ▶ Some metrics don't relate to your business goals AT ALL
 - ▶ Measure against your objective, not your investment
 - Analytics should be evaluated with "Design Thinking"—which uncovers the incremental changes and nuances that allow you to uncover new opportunities and identify unmet needs.
 - Create new experiences around things that are important to people where they feel their needs are not met. Great balance to have in your organization.
 - Involve people throughout your organization in the client experience.

LEGISLATIVE UPDATE

The Council's advocacy team, Joel Wood and Joel Kopperud, briefed the group about The Council's legislative and regulatory agenda before Congress, as well as market dynamics in recent years. Wood and Kopperud touched on some of The Council's 2014 legislative successes and explained the intricacies of various legislative and regulatory issues (both p/c and benefits related) currently impacting CIAB member firms and their clients. They also provided color commentary around Washington politics, as well as things to expect in the 2016 presidential race. Will history play a role? Only time will tell.

MEMBERSHIP UPDATE

OUR MISSION: TO ELEVATE YOUR STRATEGIC THINKING

The Council's membership duo, Alycia Kiley and Webb Milward, addressed the group and talked about ways they can utilize Council resources and services to have an operational effect on their day-to-day business. They touched on areas such as Council working groups and the recently launched Council Leadership Academy, which are designed to provide value at multiple levels within your firm.

SEE YOU IN THE FALL!

The next Marketing & Communications Working Group will be held at The Council's offices in the fall, exact date TBD. In the meantime, keep an eye on your inboxes for an invitation to join our Basecamp Project. If you don't receive one, please contact **Aesah** at aesah.lew@ciab.com. Basecamp will be our hub to connect with other attendees, ask questions, leave comments, bounce ideas off one another, or send suggestions on future topics. We're all ears!

SHARE

We encourage you to share this document with those in your firm who could benefit from these insights and ideas, or may want to join us in the future.

“People don't buy what you do,
they buy why you do it.”
Simon Sinek, Leadership Author and Speaker

AT YOUR DISPOSAL

Log in to www.ciab.com for all of our resources and intelligence, including but not limited to advocacy updates, our Health Care Reform Information Center, member alerts from the Hill, quarterly market surveys, our 2015 cyber blog and other client education tools. Contact **Aesah** at aesah.lew@ciab.com if you need help with your username and password. Also - be sure to check out *Leader's Edge* online at www.leadersedgemagazine.com.

ABOUT OUR WORKING GROUPS

Part of The Council's membership offerings, the Marketing & Communications Working Group is one of seven working groups (CFO, CIO/Technology, Claims & Risk Management, HR in Insurance, International and Legal Counsel) open to employees of Council member firms. These working groups provide opportunities for peer-to-peer dialogue on relevant topics and to connect with others who face similar issues and challenges. For more information or to join, contact The Council's **Julia Smith** at 202.662.4309 or julia.smith@ciab.com.