



# MARKETING & COMMUNICATIONS

## Working Group

### January 21 M&C Working Group Meeting Recap

- **Hosts:**  
*Kevin Wellfare, VP of Insurica & Chair of M&C Working Group*  
*Susan Rushford, SVP of Marketing & Communications, The Council*
- **56 participants**

---

After a brief post inaugural update from The Council's Government Affairs team, the M&C Working Group split in to three breakout rooms to discuss the following questions below:

The overall theme in all three groups was how attendees used this past year to accelerate and leverage their tech tools and resources to enhance engagement. Much of the conversation focused on enhancing their marketing automation capabilities to drive more targeted and customized communications and track behavior and patterns.

Another topic that all firms are dealing with is webinar fatigue and how to combat it with innovative ideas.

Some of the comments and recommendations included:

#### *Group 1*

**What new/existing strategies are you using to connect in the virtual world?**

- The shift from webinars to short videos and empowering colleagues to create their own content to share.
- Increased demand for events from subject matter experts on topics critical to the industry at this time. One firm created a Thought Leadership Network.
- To boost internal engagement, some firms set up groups or virtual lunches with their firm's CEOs and other leadership, i.e. Google Hang Outs with the CEO and Producers on Tap.

### *Group 2*

**What metrics are you using for engagement around virtual initiatives?  
Has virtual affected your conversion models? (Have you modified lead gen or retention models and timelines?)**

- With webinar fatigue building, metrics for on-demand content escalated as clients want to view content on their own schedule vs. attending live presentations.
- Looked at different points in the Sales Cycle and utilized their Marketing Automation tools to track, reengage and retarget disinterested parties with new messaging and closed the gap on the sales funnel. Also employed new communication strategies to resurface "dead leads".

### *Group 3*

**How will you apply or integrate innovation strategies to your marketing efforts in 2021?**

- Several members are using video software such as One-Mob (Jackie Pitchford-Heffernan) and Bomb Bomb (Mary Savage-Unico Group) so producers can engage with their clients. Cost for One-Mob was high at \$50/month/producer so it was being tested with a select group. Producers were also put through a training program to learn best practices on how to record their own videos (Hylant-Bridget Scott). Keenan (Charlotte Doecker) mentioned using Prezi Video.

## **Marketing Survey Results**

[Here is a link](#) to the M&C Working Group Marketing Survey results. This survey was conducted at the request of this group to collect current intelligence around the marketing structure, responsibilities and budgeting allocations of working group firms.

Thank you to the firms who participated. Getting even more responses in the future will help us deliver a more comprehensive overview of this information.

## **Save the Date: Next M&C Working Group meeting**

The next virtual M&C Working Group meeting will be **Thursday, April 29 at 4:00 p.m. ET**. Registration will open mid-March. If you have any topics you would like to raise, please contact [susan.rushford@ciab.com](mailto:susan.rushford@ciab.com).