



EXECUTIVE SUMMARY

The Marketing & Communications Working Group met February 5 - 6, 2018, at The Council's annual Legislative & Working Groups Summit in Washington, DC. The first day consisted of a joint interactive working session between the Marketing & Communications Working Group and the HR Working Group on Leveraging the Expertise of Marketing & HR, which was facilitated by Lars Schmidt, founder of Amplify. The second day, the group continued the discussion on the customer journey and the need to brand the industry (not just your firm) in efforts to recruit top and retain top talent. Ruth Rohs of The IMA Financial Group chaired the group.

PARTICIPANTS

Click [here](#) for the roster.

LEVERAGING THE EXPERTISE OF MARKETING & HR

Presenter: Lars Schmidt, Founder, Amplify (a boutique HR search and consulting firm)

Creating a stronger workforce for tomorrow relies heavily on the evolution of and the marriage between Marketing and HR, according to Schmidt. This marriage includes the role HR and Marketing play together in branding and recruiting strategies, retention strategies, and being able to identify and work through challenges like technology gaps, mass retirements, limited resources and telling a better "story" about our industry.

Key stats:

- 3 hires for every 1: Studies show that three young producers need to be hired for every currently employed producer.
- By 2020, millennials will comprise 50 percent of the workforce; by 2025, they will comprise 75 percent
 - Only four percent of these millennials has any interest in insurance as a career

Highlighting trends, tools channels and drivers of change in today's recruitment strategies.

Social Channels for Employer Branding

- Big 3:
 - Twitter (decreasing): not used to recruit
 - LinkedIn (increasing): use for manager relationships/professional content

- Facebook (increasing): house for content (1 out of 8 people on the planet use FB; 79 percent of all internet users)
- Facebook – videos
 - Facebook Live: viewers can comment
 - 10x more response on live videos
 - Organic videos have a much higher response
 - Can use the work histories feature for recruitment
 - Targeted ads (micro-targeting and using bots)
- Instagram – use depending on audience
 - Visual, stories, events: recruit
 - Show the space, where are they going to work
- Snapchat –very different channel; best if executed by an in-house digital native who has experience with it and can manage effectively
 - Creativity, Fun
 - 71 percent of users are < 34 years old
- Blogs
 - Employee–focused stories
 - Show culture
- EGC (Employee Generated Content)
 - Empower employees to share their experience being with the company, unfiltered, i.e., an Instagram takeover

Content

- Mobile first
 - Assume audience will be reading on a mobile device
 - Be transparent (over half of new hires have regrets about joining because of lack of transparency)
 - You don't just want new applicants, you want the right ones!
- General Info
 - 88 percent of new hires look to make a change within six months
 - 50 percent new employees have “buyers’ remorse”
 - 70 percent trust online reviews as a source of brand info/reference

Job Descriptions

- Frame in mobile-friendly way
- Hashtags help employees share content
- Algorithms and AI
 - Application hiring
 - Try including games/tests to see different traits to determine predicted success for a specific job
- Deep personalization

HR & MARKETING BREAKOUT DISCUSSION

Participants broke into mixed groups to brainstorm around the following topics:

How to overcome the “non-sexy” industry (industry issue, not just a firm issue)

- Interact with schools (organic)—even starting at high school level
- Tell industry stories in an authentic way (with human element)
- Reframe who you are relative to what you are doing
- Promote growth
- Understand our niche markets and how to pitch them to align with interests
- Go after candidates directly/offer a specific program for them
 - Diversity (must be authentic and not forced)
 - Show ethics, and how it's more than just your “job”

How to deal with the urgency to hire

- Capture knowledge of people who are going to retire
- Mentoring relationship between outgoing employee and new employee
- Panel approach (create an alumni association)
- Identify a common theme amongst successful, older employees
- Convince older employees to stay with the company by offering part-time or something new
- Shift sales to a more of a team environment
- Recruit, train and mentor CSRs because producers/CSRs work in tandem
- Hold high accountability for mentoring

Takeaways:

- **Company Social Profiles:** Ensure your free company profiles on LinkedIn and Glassdoor are complete.
- **Employee Photos:** If possible, use real employee photos and videos on any outward facing materials (avoid stock photography).
- **Internal Advocates:** Identify and train internal advocates to share their story on social media, blogs, etc. Be sure to equip their success by providing clear guidance on social media policies and expectations.
- **Aggregate Employee Content:** If you activate internal advocates, create a branded hashtag for them to use to help you aggregate and share all of the employee-generated content.
- **Minimize Jargon:** Review your career site, job description, etc., to reduce jargon and use relatable copy.
- **Personalize:** Persona map your target hires to tailor your employer branding efforts around the channels and content that will resonate.
- **Be a Content DJ:** Launch social channels on platforms where your target prospects congregate. Share a mix of jobs, company updates, industry information and content your target audience might find interesting or helpful. Most importantly, be sure to listen and engage with your following.

MINDFULNESS

Presenter: Kevin Davis, President, Kevin Davis Insurance Services

Davis introduced the practice of Mindfulness to his firm about a year ago after his own journey and positive experience with it. Davis' goal for his employees is to build resilience, lower stress and encourage more creativity. Davis shared with the group how he found mindfulness, after coming face-to-face with personal and work-related stress and realizing he needed a healthy way to cope. He's now a UCLA-trained mindfulness facilitator. Mindfulness is paying attention to your present moment experience with openness and balance. Davis has found that since he's instituted the practice in his office, it has created a more positive work culture and employees communicate better with their clients.

Takeaways:

- Lower stress levels equal more productivity.
- Mindfulness gives you the ability to accept what's happening.
- The goal is not to be reactive, it's to be receptive.
- STOP: Stop, Take a breath, Observe, Proceed
- There's nothing more difficult than managing your emotions, but you can better manage your emotions when you label them.
- Awareness matters.

GROUP DISCUSSION

1. The Customer Journey: Continuing the Conversation

The group further explored challenges and opportunities associated with the Wharton presentation on the customer journey.

Takeaways:

- Stay laser-focused on the customer's point of view. What is their journey like? A customer journey map may help fill in the gaps.
- Sometimes we focus too much on the pain points and not the total journey.
 - Jane Paolucci (ABD) shared a Customer Journey example that changed all of ABD's marketing. She will post in Basecamp.
 - Steven Handmaker talked about Assurance's experience taking a deep dive into customer personas and journey mapping. Said it was eye-opening, not just that they were missing components, but to see certain information and materials at different timeline points.
- Training sales team on the difference between what they see as the clients' need(s) and what the clients see as their need (s). Before you come up with a sales strategy for an account, you have to go in with questions and not a fully baked plan. Need to listen to the client.

2. The Intersection between Marketing & HR: Continuing the Conversation

Group discussion included various topics:

- The relationship between Marketing and Sales, and tension surrounding compensation splits.

- Recruiting talent, how to change the industry's "story," internship programs and potential coordination with The Council Foundation.
 - Talk about the human element to give students an idea of the industry
 - Get insurance into high school campuses
 - Meet the younger generation "halfway" in terms of being more open to flex time, working remotely and other incentives
 - Hire college students as a group so they have a ready-made circle
 - Contact Sarah Friend (The Partners Group) for information on IGNITE program'
 - Create internal ambassadors as recruiting advocates: ABD is building Work. Life. Play. culture into brand

Next Steps:

- Potential conference call on talent or branding strategies
- Leader's Edge column opportunity for thought leadership around Marketing topics (if interested in submitting a column, please contact Susan Rushford at susan.rushford@ciab.com)
- Invite new members into Basecamp community

NEXT MEETING

The next Marketing & Communications Working Group meeting will take place **November 7–8**, in Washington, DC.

QUESTIONS?

Contact The Council's Susan Rushford at [**susan.rushford@ciab.com**](mailto:susan.rushford@ciab.com).