



MARKETING & COMMUNICATIONS

Working Group

October 29-30 • Washington, DC

AGENDA

TUESDAY, OCTOBER 29

- 1:30 – 2:00 p.m. **Welcome & Introductions**
- 2:00 – 3:00 p.m. **Interactive Roundtable: Marketing Metrics**
Please share one thing your marketing team measures and how you are using those metrics/insights to be more impactful. Leverage the expertise around the room: What one thing would you like to measure or gain insight on that the group can provide guidance? Are you using outside tools/software that have been effective—would you recommend?
- 4:00 – 4:15 p.m. **Break**
- 4:15 – 5:15 p.m. **Break-outs:** Member-led discussion broken out in three key challenge areas that have surfaced from the group.
- Strengthening a firm's brand
 - Strengthening your digital strategy
 - Generating revenue opportunities (lead gen, business development, new markets, etc)
- Each group will brainstorm and challenge each other around these high-priority marketing areas.
- 5:15 – 6:00 p.m. **Cocktails and Inside Baseball with The Council's Government Affairs Team**
Our government affairs team will provide an update on the happenings on Capitol Hill and give us their take on which bills might pass, which don't stand a chance and what is lurking around the corner. *Please send us (in advance if you can) any questions you may want them to address that will be of help to you in your communications with both your colleagues and your clients.*
- 6:45 – 9:00 p.m. **Dinner** - The Smith (near the office)

WEDNESDAY, OCTOBER 30

- 8:45 – 9:00 a.m. **Coffee & Light Breakfast**
- 9:00 – 11:30 a.m. **Workshop: Rebranding the Industry to Attract and Retain Talent (and Clients)**
How are we messaging our industry in a way that truly speaks to the value the industry (brokerages) provide? How do we talk about what we do and what we contribute that is meaningful and impactful? We will also present an overview of the survey results conducted with HR and talent managers of member firms regarding recruitment perceptions and challenges.
- Cake & Arrow**, a customer experience design firm with a background of working with the insurance industry, will facilitate a collaborative workshop for the group. Applying design thinking techniques, **Cake & Arrow** will lead the group to identify messaging benefits and hone the voice of the customer to evolve the perception of the industry within your own firm's environment.
- 11:30 a.m. – 1:00 p.m. **Lunch** - Overview with The Council's Market Intelligence team regarding the claims survey. How can this data benefit and provide relevant intelligence for your firm?
- 1:00 – 2:00 p.m. **Marketing Roundtable & Planning for Next Working Group**