



# DYNAMIC CAMPAIGNS

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## 6 TIPS TO BETTER POWER FIELD SALES AT SCALE

### What's Included?

- The Dynamic World of Campaigns
- Getting Started
- 6 Tips for Dynamic Campaigns

### Course Materials:

PDF Tipsheet (3 pages)

**Estimated Time:** 15-20 minutes

## THE DYNAMIC WORLD OF CAMPAIGNS

In a survey of our users in 2018, we heard that the average agent or advisor wants to spend about 5-10 minutes a week managing their digital marketing activities. That makes sense when you see that over 70% of all published content is re-posted from the library.

In an effort to make that 10 minutes better spent on digital marketing behaviors that truly differentiate their practices, we built Dynamic Campaigns to provide critical automation around sharing timely and relevant content. Instead of spending time re-posting from the content library, agents and advisors can spend 5 minutes writing one great, personalized, and relevant post for their clients and prospects. The rest of the content can automatically go out on their behalf by subscribing to the right mix of campaigns provided by their corporate marketing teams.

### Benefits:

- Make agents and advisors more efficient and successful digital marketers
- Improve the reach of your content
- Generate more website traffic from your social selling program

In the short time since launching the feature, we have already seen an incredible impact not only at increasing client touch points via more publishes, but also in re-activating dormant agents and advisors and infusing renewed energy into our clients' digital marketing programs. In addition, brand reach and amplification have seen great positive impacts. Through this period, we have also learned some valuable general best practices to set you up for even more success with this exciting new feature. Use these getting started pointers and six tips to optimize your program.

## GETTING STARTED

1. Pick campaign topics (see tips for some guidance and your CSME can also help with data-based recommendations).
2. Create Campaign Content in your Hearsay Systems library.
3. Create at least one Campaign & Schedule Content.
4. Promote your campaign (use out of the box campaign email and permalinks to send promotional emails from marketing & field leaders). Also, enable action cards, if you haven't already, to take advantage of upcoming cards that will promote campaigns.

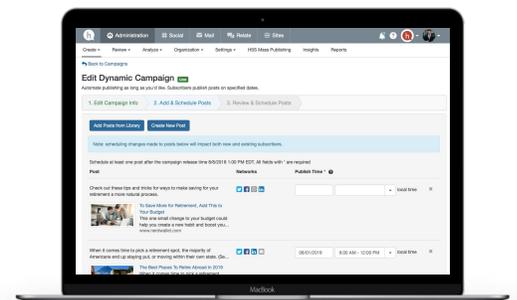
## 6 TIPS FOR DYNAMIC CAMPAIGNS

### 1. More is More

The best way to drive adoption with Dynamic Campaigns is to ensure there are diverse options so that any agent or advisor who subscribes can find something relevant to their business and audience. In general, we recommend 5-10 available Dynamic Campaigns at any given time to make sure there's something that will resonate with everyone. Of those available campaigns, you want some that will post content fairly regularly (1-2 pieces of content per week) and some that might have content monthly, or at a less regular cadence.

In addition, you want some of these campaigns to be "evergreen," campaigns that are broad enough in scope that you can continue to supply content to them over a long period of time. Agents and advisors will benefit from having regular and timely content on their social profiles and websites without having to subscribe to new campaigns too often.

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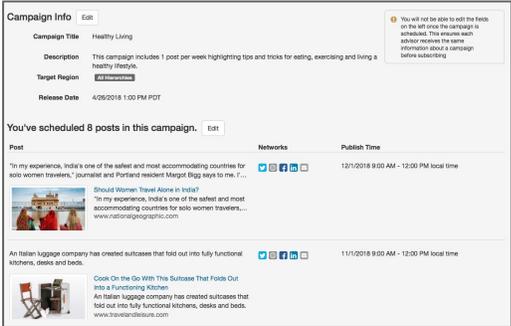
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with the public.

## 2. Queue It Up

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Schedule one piece of content for every live campaign at any given time.



## 3. Make Lemonade

We know that many of our clients are bandwidth- and resource-strapped and that coming up with even more content for campaigns is a challenge. Our recommendation is to run the "tags" report on content in your content library and see what content is currently leveraged the most by your field sales organizations.

Don't worry about creating unique content. The goal of dynamic campaigns is to create automation.

Look at top-performing and most-published tags and pick a few to turn into campaigns. As you add them to the library, also add them to the campaigns. This is the fastest way to equip your field with automation without creating additional content resources!

## 4. Get Targeted

Align with your field sales training and playbooks and think of campaigns for target client demographics. Who are your agents and advisors targeting? Can you create campaign content that resonates with that audience?

Creating campaigns that align to target client demographics will align your content with the business outcomes your advisors are trying to drive.

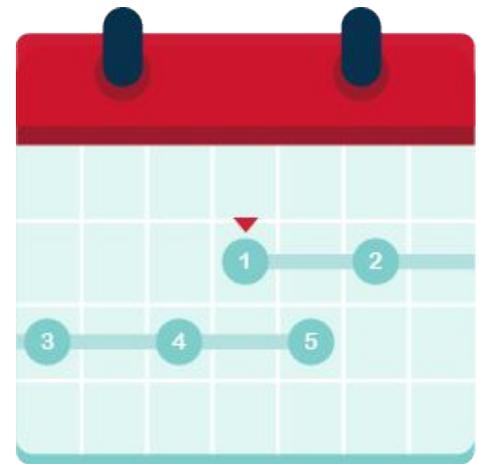
This will create a more tailored, yet automated, experience for the agents and advisors in your digital marketing programs.



## 5. Check the Calendar

Even though we hope agents advisors subscribe to only the campaigns relevant to them and not ALL available campaigns (if there are many), we know that some may get over-exuberant and subscribe to everything. To mitigate for these 'oversubscribers':

**We recommend assigning each campaign to release content on specific days of the week and that no more than 2-3 campaigns are assigned a given day.**



This way, even in the worst case scenario, only a few posts would go out on an agent or advisor's social networks each day. There will be some exceptions to this, like with holiday-related campaigns.

In addition to assigning each campaign a day, we recommend highlighting that day in the campaign description. This informs agents and advisors when to expect content from that campaign, and also reminds distributed content teams when to schedule the content to be released.

## 6. We Will Do It For You!



Do It For You (DIFY) Dynamic Campaigns! What are these, you may ask? They are Pre-Built Dynamic Campaigns with lifestyle content for you to review in draft mode before providing them to your agents and advisors.

**These campaigns automatically add content each week from trusted sources, like TechCrunch, Fortune, Bloomberg and Time. The three campaigns currently available focus on Tech Trends, Millennials and Money, and Healthy Living.**

You always have the ability to add additional content to these Pre-Built Campaigns and you can remove existing content that might not be relevant for your organization.

If you are interested in testing one of these Pre-Built Campaigns to supplement your content efforts, please reach out to your Customer Success Manager.



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