



# Hear - Do Your Research

LISTENING TO CLIENTS AND PROSPECTS ON SOCIAL MEDIA

## WHAT'S INCLUDED?

- Hear Do Your Research Checklist
- Social Listening 101
- Best Ways To Connect With Your Audience
- Dig Deeper Into Your Connections
- How Hearsay Helps
- Industry Specific Tips
- 3 Things To Do Today & Further Reading

## Course Materials:

- PDF (6 pages)
- Estimated Time: 15-20 minutes

# Hear Do Your Research Checklist



BE



GROW



HEAR



SAY



Hearsay System's standardized methodology to achieve advisor social success is called BE | GROW | HEAR | SAY (BGHS). The following document walks through Step 3: "HEAR". "HEAR" success comprises three parts: signals, social conversations, and having coffee with your network.

Signals are major life event notifications generated in Hearsay Social ("Hearsay"), which you get by having a Twitter account, having your clients and prospects opt in on Facebook, and/or by having a premium business LinkedIn account.

Social conversations are measured by how frequently you reply with a like or comment when someone comments on your social content and having coffee with your network a way of keeping your finger on the pulse. What are other people talking about with you and with others? Here are some tips on what to work on if you want to improve in this area:

## FINDING SOCIAL SIGNALS

- Learn about the Facebook social updates tool and invite clients to opt in so that you can receive valuable life event and money in motion signals from them. Do we have a video that walks through FB opt-in?
  - Ask clients to opt in to your request for updates during annual reviews
  - BONUS RESOURCE: What are social updates? Please note that some organizations do not allow the use of these updates. Please check with your marketing team first.
- Log in to LinkedIn and look through your Notifications. Follow up with any recent job changes, congratulate anniversaries, etc.
- Log in to Facebook and for any clients (or prospects?) If you are friends with on your personal profile, you should opt to "Get Notifications". This means when they make status updates you will always see it with a little notification from Facebook when you log in.

## SOCIAL CONVERSATIONS AND AWARENESS

- Check your Facebook business page, LI profile, and Twitter account at least 2-3 times each week for any notifications that one of your followers/connections commented on your posts. Respond to these comments with a like, or comment back as appropriate. This will make it more likely for them to see future updates and ensures that you don't miss important communication opportunities.
- Check your clients' profiles on social (Facebook, LinkedIn, Twitter) wherever you are connected before a meeting with them, so you are going into the dialogue warm. A fast way to do this is look the contact up in Hearsay , and we will show you all the networks you are currently connected with that individual on, with links to their profiles. Look for:
  - Recent job changes in their about sections, etc.
  - Name changes
  - Posts about new homes, moves, retirements, etc.
- Update your client/prospect records with anything you learn about when doing social research.

Social Awareness is an important part in delivering a tailored client experience that maps your services with a client's dynamic and changing.

Don't miss this opportunity and follow the steps above to successfully identify life events and act on them!

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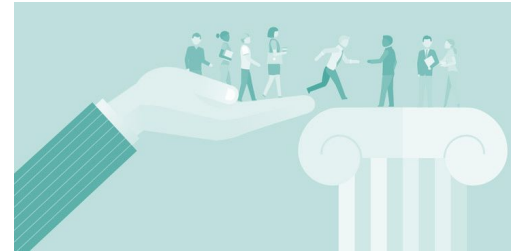
## PROGRAM OVERVIEW

In this course, you will learn to improve the way you research clients and prospects so you can identify social selling opportunities.

## SOCIAL LISTENING 101

*Understand the importance of doing your research*

Social listening should not be overlooked when it comes to your business strategy. It is essential to monitor what is being said about you and what your clients and prospects are sharing on social media.



**Social listening.** Also referred to as social media monitoring, social listening is the process of identifying and assessing what is being said about a company, individual, product or brand.



**Social media is not a monologue.** In addition to posting and engaging with your audience, it is equally as important to listen and respond to your audience's posts.



**Gain a competitive edge.** Use social listening as a way to identify **WHEN** to reach out, **WHO** to reach out to, and to know **WHAT** to say.



**Make better business decisions.** Use the content people are sharing on social media to market your brand, prospect for new clients and prepare for meetings.

### Determine Your Target Audience

- What age range do you typically market to?
- Does level of education play an impact? Household income?
- What type of community – suburban, urban, rural?

### Do Your Research

- By determining and understanding your audience, you can
  - Attain lower cost-per-lead and cost-per-customer
  - Higher sales productivity
- Create fictional, generalized audience personas to better understand your target audience
  - Answer the **WHO**, **WHAT**, **WHY** and **HOW** about your audience
- Determine your own social persona with each social network
  - What would you want to share on Twitter, Facebook, LinkedIn?
  - What seems appropriate for each audience?
  - How can you craft your persona on each to get the tone right?



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## DETERMINE THE BEST WAY TO CONNECT WITH YOUR AUDIENCE

*Understand why individuals gravitate to the different networks*

**What people are talking about.** People are sharing valuable information across the social networks. Individuals in your network share information about life events such as having a child, buying a home, starting a business, pursuing higher education or training, unplanned events (natural disasters, planning for retirement, marital status (marriage, remarriage, divorce), employment changes and death.

**Where they are talking about it.** Once you have identified your target audience, think about why your audience gravitates to particular networks and what types of information they are sharing on each:

- Facebook: Casual, more personal information; life events
- LinkedIn: Professional; career-focused
- Twitter: News-related, trends

**Other Money-in-Motion events.** What are the money in motion events unique to your business that may cause people to buy your product or move their business to you? How are you going to position yourself so you're ready when these events occur?



## DIG DEEPER INTO YOUR CONNECTIONS

*Classify your connections and leverage Centers of Influence*



**Classify your connections.** Search through your contacts and make notes about how you are connected to help determine the strategy you should use when approaching them. Then, tailor your message accordingly to best connect with the person.

- Distant connections: People you don't know or hardly know and don't communicate with on a regular basis.
- Close connections: People you know well and typically see and/or speak to on a regular basis.



**Centers of Influence.** When a life event happens, think of the gatekeepers or centers of influence (COIs) in each industry that you might reach out to in order to connect and move the needle for your business.



**Manage notifications.** Configure your email notifications on each network to make sure you never miss an update that might be relevant to your network. You can choose to get an email for every notification, a weekly or daily digest email or choose to turn off notifications.

## Social Listening Best Practices

DO

- Listen for "social signals" like birth announcements, job changes, office openings and acquisitions
- Respond in the feed or take it offline and send flowers with a handwritten card.
- Research contacts before a meeting, whether you are meeting them for the first time or they are long-time clients

DON'T

- Don't launch into a sales pitch. Social media is about relationship building and the soft sell.
- Don't be creepy. The same social etiquette and courtesy that govern your offline interactions also apply online and on social media

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## HOW HEARSAY HELPS

### Get Notified of Money-In-Motion Events

Social Signals combs posts/comments for indications of life changes and flags you when Facebook/LinkedIn Profile bio info changes like job title changes, name changes, location changes, etc.

All of this info is then presented in a streamlined view within Hearsay for ease of use and interaction.

### Hear Everything in One Place

The Activity tab lets you monitor all connected social media accounts from one feed. There's no need to flip between different social media sites.

Stay in the loop with all the latest news and happenings across the industry, your clients, and social media platform and like, reply, and retweet/share messages all from the same place.

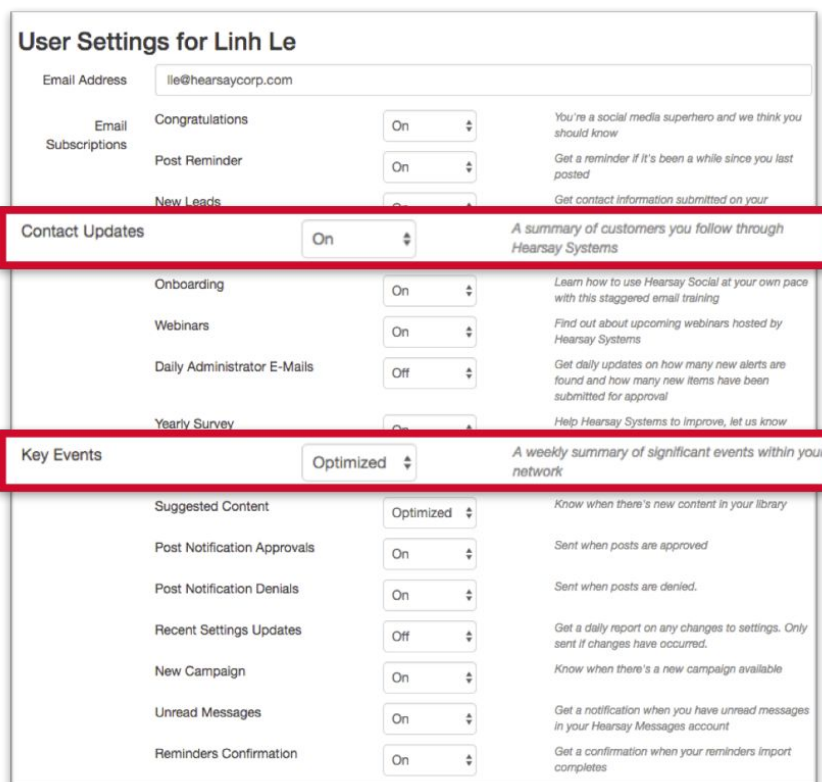
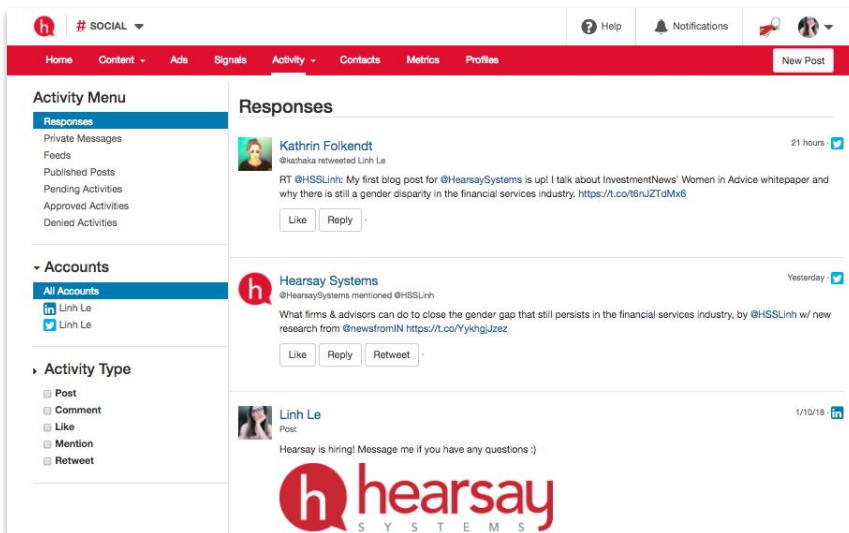
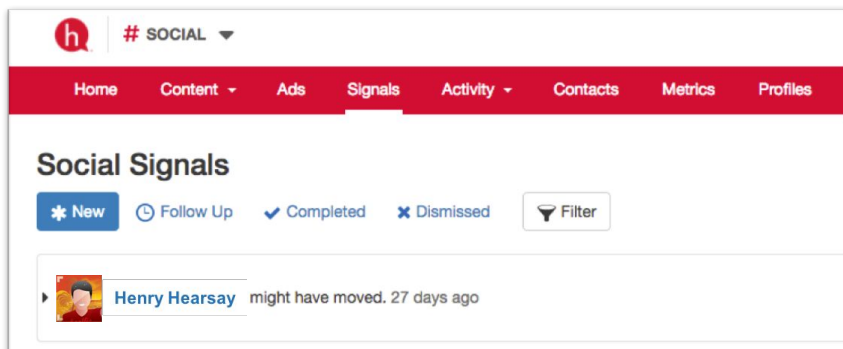
### Receive Important Summary Updates in Your Inbox

Work gets busy and social media can be overwhelming. To make staying in the loop easier to do, Hearsay allows you to subscribe to helpful summary emails.

**Contact Updates** – Never worry about missing the latest news about the people you follow. Turn this on to receive an email summary of the customers you follow through Hearsay.

**Key Events** – Helps keep you in the loop on important events in your network. Receive a weekly summary of all the latest and most relevant news that your network is talking about. Make sure to keep this option as "Optimized" for the best user experience.

Access these summary email settings under *User Settings > Basic User Info & Preferences > Email Subscriptions*.





## DO YOUR RESEARCH: INDUSTRY-SPECIFIC TIPS

### Twitter as a Private Social Listening Tool

Some agents might use Twitter solely as a tool for staying up-to-date on industry news and not tweet anything out. If this is something you're interested in doing, make sure your account is on private and your name and photos cannot be connected back to your brand.

### Twitter Lists

Take advantage of the Twitter Lists feature to filter the content by type. Some lists you could create are Industry News, Consumer Trends, Lifestyle, etc. This way, your social media feed could be broken up into more digestible parts.

### LinkedIn Groups

Join local Chamber of Commerce groups and other local groups on LinkedIn to help build your book of business.

### Money-In-Motion Events

Make opt-in social signals as a part of your onboarding. Stay on top of your customers' social signals on Facebook by making opt-in a part of your onboarding. Whenever they have a money-in-motion event, you'll be able to see it in Hearsay and take action.

Here are some key money-in-motion events for the insurance industry.

#### Insurance Specialists – Personal

- Birth
- Divorce
- Promotion
- Family illness
- Taxes
- Marriage
- New job
- Retirement
- Income needs

#### Insurance Specialists – Business

- New partner or owner
- Business succession
- Growth/ Expansion
- Taxes
- Buy/Sell Agreement
- Estate Freeze

### Identify Pain Points to Help Content Strategy

- Consumer Data – Listen and leverage the power of public 'consumer data' and related trends to identify pain points.
- Natural Disasters – Catastrophe losses for the firm; capital requirements to meet the policy payouts

### Social Signals Based on Life Events

- Renting 1st apartment
- Promotion. May lead to purchase of high-ticket items (i.e., second home, recreational vehicle, new car)
- Buying a home
- Moving to a new state / community. What are the environmental risks? (i.e., earthquake, fire, etc.) Know your market.

## 3 THINGS TO DO TODAY

1. Create 2-3 audience personas (and 1 negative persona)
2. Write 2 generic but personal notes on LinkedIn to congratulate someone on a birthday, work anniversary or new job
3. Identify at least 1 Center of Influence (COI) as you browse through your clients' LinkedIn connections. Ask for a warm introduction at your next meeting.

## FURTHER READING

1. [Capturing Money in Motion](#)
2. [21 Actionable Tips to Make Your Content More Attractive](#)
3. [7 Tips to Consider When Marketing to Millennials](#)