Transcript: Digital Agent demonstration call

Shawna Ireland:

I just want to welcome everybody to the session. I know everybody's weeks are busy, but I just want to go ahead and thank everyone for taking the time to be with us for this hour. So most of you have already been introduced to Digital Agent. It's the easiest platform for advisors to use and quickly build and customize a professional site that's both clean and robust. But this session particularly is aimed at giving us a deeper overview of why it's a great fit for your business as well as the basic tutorial to help you get started and get you thinking more about how you can customize this platform to fit your own business goals and market in 2022 and beyond.

So first I'll introduce myself. My name is Shawna Ireland. I've been a Training Manager with the Advisor Development Team since just June of this year, but I've been in the financial services industry since 2014. My passion is really in helping advisors connect with their conviction for being an advisor and developing some tech and tools to improve the client experience. With that said, I'll hand it over to my co-host, Brad Murray and let him introduce himself. Go ahead, Brad.

Brad Murray:

Yes, good day everyone. My name is Brad Murray. I have been with Canada Life for the past four years. I work on the Field Marketing team, and I work very closely with advisors as they integrate the Digital Agent platform into their businesses, and we do that in a variety of ways as we will discuss in the following minutes.

Shawna Ireland:

Okay, thank you Brad. Again, we're going to have a live Q&A at the end, but just I see some things popping up in the chat, or I did. So, if you have questions along the way, we're going to have Scott from Field Marketing fielding some of those questions in the chat. So, if you have something along the way, feel free to pop it in or you can save it until the end.
But as far as an agenda today, we're going to go over the value of Digital Agent in your practice and highlight some of the more important features. Brad's going to also take us through a demo of getting set up and the basics of customization if you're interested in differentiation and growing your practice that way. We'll also share where the resources are and again, there's going to be that live Q&A at the end so you can ask any questions relevant to growing your business online and Digital Agent itself. So, with that said, we will move forward.

I'm not sure if you've ever made your own website using WordPress or Wix, Squarespace, Duda, any of those platforms. If you have, I congratulate you if you manage to pull it off without pulling out all your hair or developing a serious caffeine addiction. I've done both. Setting up a site can be a really easy task for different kinds of business owners, but we are not so lucky. Because of the nature of our business, we require a more robust site and as well, our clients often require a lot more attention than other types of businesses. So, it can leave us with not very much time and energy to spare. That's why you need a website platform that can streamline your tech-related and digital marketing and so that you can get back to what you're supposed to be doing, which is having meetings and building long-term relationships with your clients. This platform can allow you to be a generalist or a specialist and it's ready for you to use out-of-the-box on day one. It's preloaded with preset branding, colors, banners, icons, images, everything that you need. Of course, you can add your own pages verbiage and format your own content super quickly. Whether you want to customize and really differentiate yourself or you're really just looking to keep it simple, set it and forget it, this platform can fit either of those needs. It really is a template where you can make it what you want to make it.

A lot of people say, "Well, I don't have background in websites." And what's beautiful about this platform, unlike the other ones that I mentioned, is that it’s so simple. You need absolutely no background. You can use the platform's pre-built templates to put together your own custom forms like intake forms or bookings; blog articles; team profiles with the same level of ease as just saving a file. You just start with the template, and you build it out to suit whatever your business needs are. Most important, with it you're getting a professional looking website. It's aligned to the Canada Life branding so you can get back to business. While you're focused on clients, your site is focused on getting you more.

As I mentioned, you can add your own content. So, Brad's going to show us that if you're adding your own unique block of content like verbiage, a blog post, you simply need to write it and click submit. It's as easy as that. That's a huge change from where we were before because all of it is now done inside the tool itself. You can save yourself emails back and forth because your custom content is submitted and reviewed inside the platform by Field Marketing and compliance. So, it helps to streamline the task of getting your content published and getting links on your live site. If there is an issue with the content, Field Marketing is just going to be in contact with you, but it all happens right inside the tool, which is great. Brad's also going to show us how we can add pre-approved content if you want to from the content library with just a few clicks. It's content that's ready to publish and ready to go. With Digital Agent, there are simple click-to-add compliant blocks for seasonal marketing and that can help highlight all the products and services that are relevant to every market, specifically your market. Because these blocks are already Field Marketing-approved and they're regularly updated, you know that the available content options are up-to-date and fresh for your market.

You can drag and drop your content onto the page, so it removes all the formatting guesswork. You don't have to rearrange things as you drag and drop. Brad's going to show us that other features will just move around it naturally, so you don't have to worry about having to reformat things, which is amazing. It gives you more time to talk about specific products on your site and more leeway. A great example of this is the content blocks about mortgage rates and mortgage information on the pre-approved mortgages page. So, on average, Canada Life mortgages have better rates than most lenders, but a talking about that is really difficult on an external site. The compliance piece is super daunting to get your verbiage correct and all of those things. With the Digital Agent site, there's approved mortgage content and you can even post current rates that update automatically.

If you're new to advising or you're looking for lead generation, this is an absolute must, content like this is an absolute must. In 2022, to be successful online, whether success is defined as just prospects being able to find you and read a bit before their meeting, or success is gaining a huge following, generating leads, either way, you have to be one thing and that's active. If this made you think “I don’t really have time to be active,” then you'll be interested to know Digital Agent can help you with that too. You can share the pre-approved blog content that appears automatically to build a digital presence with almost no effort. Brad's going to show us in a few minutes how you can do just that. Basically, Field Marketing pushes curated relevant blog posts to your site several times a month. This can help it look like you're adding fresh content, you're staying digitally active, when really, you've not done much, which is fine if you don't have a lot of time.

He's also going to show us how we can take the content and share it to your socials. This keeps your feeds fresh on your socials with just a few sentences or questions posed to your audience and there's new content added regularly. It also includes all the current campaigns like RRSP season, RESP season, holidays, current events that are happening around the world in the market. Those are just a few. So, with the pre-approved content, you can schedule it and do it all from 9:30 to say 9:45 on Monday morning and still make it to a 10:00 AM meeting, time to spare, a big coffee if you're me. But the whole point is that you can do it simply, easily, and you can look really active with minimal effort if that's where this fits for you.

So these next pieces are probably the most important as far as I see it anyway. Brad's going to show us that there are pre-approved client logins and calculators. Do you think, "Well, how important is that?" But having these on your site does one thing: drives traffic and keep people on the site. If your client needs to log in to see any of their accounts, they can use your site to get there. Seeing your face, seeing some things that you've posted, that's almost like a touchpoint and who knows, while they're on your site, they may stop and read a blog. They may think, "Oh, you know what? It's getting close to RRSP season. I should probably put some money in my RRSP" or "Oh, I see a post about RESPs. I was going to tell my sister that she needs to open one. I should get her in touch with this advisor", or "My mortgage is coming up and I saw there was some content." It's all about driving them there and keeping them there.

So the second part of this is calculators. People love calculators and if they end up on your site to use them, they again might stay. The whole point is that your site can and should be like a hub, a gateway where your clients can access everything that they need, their logins, calculators, news, anything that they want to see, and they also get to access their favorite financial expert – you – all in one place. Finally, the Field Marketing team provides robust support and resources, and this is probably the most important part. You can delegate the maintenance and refresh of your site to someone on your admin team, it's that easy. And if they need help, they can reach out to Field Marketing on your behalf and it saves you the time so that you can do again what you do best, which is not messing with a website.

Field Marketing can help provide you with all the answers, to all your questions. They can train your internal teams and they can provide a robust level of support to make sure that you're successful right from onboarding all the way through. So, it really is the easiest way to get a professional site with minimal effort. With that, I'm going to hand it over to Brad who's going to show us some of these features that I talked about and how easy they are to use, and he's also going to show us a couple of examples of those two advisors that I talked about, which is the advisor who took the template, really customized it, made lots of changes, and then an advisor who didn't make too many changes but still is branded and fresh and active on the site. So with that, I will hand it over to Brad if you're ready.

Brad Murray:

Oh, I am ready. Thank you kindly for such a warm introduction there, Shawna. So at this point in time folks, I am going to hijack the screen and we are going to take a virtual tour of one of our template sites so that you can see a lot of the value propositions in real time and just how you might go about using this with your business. I am now sharing my screen. So, if you're wondering at all what Digital Agent is or what it looks like, it is on the screen in front of you right now. This right here is the site that we give to self-branded advisors that could include incorporated firms or advisors who are holding out as sole proprietors. This template starts in a very neutral state and from there, there are all kinds of things that you can do to make this your own.

As Shawna had mentioned a few moments ago, I will show you a couple of examples towards the end of the virtual tour of two advisors. One who is a Canada Life advisor and wrote a lot of his own custom content and created a lot of new pages using the platform and another who is an incorporated firm, has gone through some additional work through Field Marketing and it aligns very closely to his branding.

Let's start our little tour, shall we? So, what you are seeing right here is out-of-the-box what you can expect to get day one. The homepage has a few different elements including a bio and a fillable custom form. These exist as templates within the platform and you can build additional profiles, forms and other templates that are readily available. There are a variety of pre-approved pages that come day one. I'm just hovering over the tab that is entitled Planning, and we have a variety of product and service pages that are located here.
All of this is populated with pre-approved content that was written by Canada Life Field Marketing. The nice thing about this content is it exists in pieces, and we have the ability to access a specific section of the tool where we can update the content and when we do those updates, anyone that is using one of these pieces of content on their website, it will update globally. So, you can rest assured that the content that is on your website that is written by Canada Life is going to stay up to date, accurate and compliant.

In addition to the product pages, I might just also highlight some of the resources that are underneath the *Client resources* tab. Shawna had mentioned the client logins page as well as calculators. These exist as pages, and they have links over to these calculators and various login dashboards. The nice part about this is that prospective clients can almost use your website as a source of truth and that will keep them coming back to your site again and again.

At this point in time, what I would like to do is I would like to start highlighting some of the value propositions that are available with this tour and just what they mean to you and your business. One of the top value propositions that I tend to highlight is the fact that the platform is very easy to add and edit. You can add blocks, which are pieces of content, onto the page to create your own custom content and you can also pull pre-approved content from the content library. I'm going to draw your attention to these two buttons at the top of the screen. I might even just scroll in just a little bit further.
The *Add* button here and the *Browse* button are your principle means of adding content to the site. I'm going to highlight this option right here, this *New content* option, and I'm going to add it to the page. Now, what's pretty slick about this, is that it will add this placeholder piece of copy to your screen and you can access an editor view, which allows you to begin plugging in your own custom content. I'm just going to just add in some placeholder content right here, and as you can see very, very quickly and in real time, I am adding custom content onto the page.

This is all functionality that you have access to the platform and will be able to do yourself or you can delegate it to your support staff, and we will provide training to help you get up and running and comfortable using the platform. So as you can see, we do have some custom content that I have added onto the page in real time and the cool thing is that you can grab these pieces of content and if you were say to highlight this crosshair icon right here, you can click and you can drag it around on the page. There are a variety of layout options available through this platform which allows you to drag and arrange your custom content on the page as needed.

So I have highlighted the fact that you can very quickly and easily add and arrange content on the page. What I might highlight as my next value proposition is the built-in compliance functionality. So within this tool there is a review hub and this review hub allows you to submit your custom content to it. And if I was to draw back the curtain and give you folks a little bit of insight into what happens behind the scenes, let's say you are building out content on your website and you get to the point and you're like, "Wow, this is fabulous and this is what I want to be appearing live on my site." Well, there are two buttons here that I'm just highlighting down towards the bottom of this editor panel and these buttons right here allow you to submit these pieces of content to our review hub.

So the *Submit for approval* button will actually kick it over to the hub where my team, Field Marketing, will review it for communications, so stuff like spelling, grammar, and we will also make the call of whether content needs to go to the compliance team. Our compliance team also has access to this review hub, so the built-in compliance functionality allows you to essentially start adding content onto your page and begin customizing it and it takes out some of the back and forth that you might do with content reviews via email. So this is streamlining a lot of your efforts. I'm going to click *Save as draft* as I have done a few times already and having done that, what I should highlight here is that this content is not actually live and visible on the site at this moment in time.

We can see it because we are logged in and impersonating this environment. When you're logged into your site, this is what you may see as you're building out your content, but it will only appear live on the site after you've submitted to the review hub and it's been approved there.

I'm going to move right along to value proposition number three, and that is the pre-approved bank of content that you can use and add to your website. Now I just highlighted that built-in review hub and the nice part about the pre-approved Canada Life content is that it bypasses that review hub because it's pre-approved and it's already there and ready for you to use. It's compliant and it does not go through these reviews. I'm going to highlight the browse button, which I drew your attention to a few moments ago. I'm going to click this and I'm going to select this option here that says content library.
In this panel right here, you will see that there are a few different tabs. I'm going to select this option that says *Marketing materials*. A lot of what's here can help you start building out your pages and specifically the types of things that you want to position on your website. There's a lot of very topically relevant things that you can find in this bank. So maybe let's take a look at this option right here that says, *Ask an advisor: Why work with an advisor*? I'm going to come over here and I'm going to click this preview option and now you can see that this is actually a video. You can actually watch it in this panel, see if this is something that you would like to position on your website and maybe you're like, "Wow, this is fabulous. I would love to just add this."

You can click *Add to page* and as I mentioned, that is a demonstration in real time of how you can leverage some of the pre-approved Canada Life content to begin building out your site pages. Now, in addition to that panel that I just showed you, there is also a pre-approved bank of blog articles and what's probably very interesting to this group right now is the fact that a lot of this can be used to start conversations and prospective business. You can also use it as a means to drive traffic to your website and as Shawna highlighted earlier, maybe your clients will come to your website to see some calculators or access their login dashboards, while they can also come here as a means of just interest. They see a topic in your social media, well, they can click on that article and it will drive them directly to your website.
I'm going to demonstrate that in real time, so I'm going to highlight this option, *Tips for talking to a financial security advisor for the first time*, and I'm going to click into the actual blog view itself. You'll see that there is a whole blog article here and you can publish this on your social media for all your followers to see. I'm going to come up here to the social media handles and I'm going to click on this LinkedIn icon. Now, as you are seeing in real time, we have come to my LinkedIn profile and the view that you are seeing right here is just how quickly and easily you can come here and begin customizing a post for your followers to see, and once it's there, your followers might click it and then they might decide that they want to have a conversation.

So that's a little tip to drive traffic and maybe start some meaningful conversations. Let's talk now about seeing what engagement that you get with your website. I have brought you here to a dashboard that we call the Digital Workspace. So spoiler alert, when you first log into your website, this is the first screen that you'll see and on this page right here, you can access many sections that allow you to access buildable templates that you can place onto your website, but you can also see this option down here that is entitled *Dashboard 2.0* and why this may be of interest to you is that this allows you to see analytics. So if you want to see what traffic and engagement is happening on your website, this is a good place to come and scope that out.

As you can see, we are looking at our default template site out-of-the-box. So as you can see there's almost a calendar type view and we can see on a date by date level traffic that has been driven to the website. You can see more than just visitors. You can also come over here and see engagement and this will allow you to see for example, which pages your site visitors are most commonly coming to. You can see how long they're staying. You can see if they're just coming and then immediately leaving. So there's all sorts of useful data here for you to see and get a feel for how people are engaging in your website. And honestly, the sharing content method that I shared just a few moments ago, I think that if you find that if you did that, that's going to become a very healthy and meaningful activity that you do as part of your digital marketing strategy and it's a really simple thing that you can do to get people thinking about talking to you.

Okay, so at that point in time I have concluded on the value proposition for the platform. What I also wanted to do at this point in time is I wanted to speak just a little bit more about what you can expect if you opt into the platform and what support you can expect to get through the Field Marketing team. So, a lot of what I'm trying to highlight to you here is that this is a very user-friendly platform for you to use and as Shawna highlighted, you don't have to have a background in websites to use it. I hope that you'll look at this platform and think this is no more difficult than using say Microsoft Outlook. It is just a platform and you just have to know where to click and where to go, and that's the support that you'll get with Field Marketing.

We are here to coach and empower you to use this platform and we are always willing to connect with you, give you the guidance that you need, consult with you on things that you want to do on your website, and most importantly, we're here to help you get up and running as smoothly as possible. We have a few different ways that we do that. We have a general checklist of onboarding items that we will consult with you as in your first early days with the platform and it's our hope that these checklists and detailed documentation will help you navigate through your onboarding in a streamlined manner. Okay, so that highlights a bit about what support you'll get through Field Marketing. I would also, before I hand the floor back to Shawna, I would like to maybe show you some of the support materials that are already available and have detailed documentation for you to review and consult with as you're getting up and running with the platform.
I'm sure that a few of you on this call have seen Field Marketing's landing page. On this page you'll find that there is a variety of information about a lot of the platforms that Field Marketing supports through the Digital Toolkit program. Some also would include Hootsuite and Docs, but I am going to draw your attention to the Digital Agent tab and I'm going to click on this *Managing your site* page. If you come here, you'll see that there are all kinds of detailed step-by-step instructions for you to reference. So, if you were looking to say, remember how to add that custom content block that I showed you a few moments ago onto your page, there's detailed step-by-step instructions for you here to reference. You'll find that a lot of your common questions are here, and we can very quickly help you navigate and find this information, but again, as I've said, we will work with you and communicate with you and make sure that you receive the information that you need in a streamlined manner.

Okay. Before I conclude today, in addition to talking about these support materials, I would like to show you a few examples of two advisors that have used this platform really well. The first is a Canada Life advisor and this advisor has really, really just dug into creating his own custom content. He has used a lot of the features through the platform and I'm hoping what you'll see here is the fact that he's made this his own. It has all sorts of his own custom content that he's researched, drafted, and put through compliance reviews. He's built all kinds of product specific pages that were not included in the out-of-the-box template site, and he's made this his own.
So, this is for you eager beavers who are very, very jazzed about writing your own custom content. I would also like to show you an advisor who, on the surface level when you look at his site, you may be tempted to think that there's been a lot of work. Well, he's used a lot of the pre-approved pages and features that are available day one out-of-the-box, but he's pursued additional graphic design support through Field Marketing as well as we helped him work with the vendor through a standard list of recommendations that has enabled him to tie it to his own personal branding. So this is an advisor who is based out of Windsor, Ontario and he has, as you can see, we've gone to the vendor and we have made the elements on his websites consistent with his own personal branding.

Again, what I'm hoping that you take away from this is that you can make this platform your own and it can be whatever it is that you need it to be. So, if you really want to get into the weeds and really build your own unique looking website, you can do that. If you want to set it and forget it and use a lot of what's there on day one, and essentially use it as a digital business card or means of prospecting business to your site, you can do that too, and there's no wrong way to use the platform. At this point in time, I believe I've concluded on my standard demo for the platform. I'm going to hand the floor back to Shawna and very soon I'm sure we'll have some time to take your questions.

Shawna Ireland:

Thank you Brad. Can everybody hear me okay? It was a little glitchy there. Is my mic back on Brad?

Brad Murray:

I can hear you just fine, Shawna.

Shawna Ireland:

Okay, good. Sorry I was a little glitchy with a lot of people on the call. Thank you so much for that demo. It's awesome. So I did have a question from the chat and I wondered if you might just explain how did you arrive at the dashboard? Was it from the Digital Agent site?

Brad Murray:

Ah, that's a good question and that really speaks to a lot of day one items that I would say is very useful. I apologize folks, I'm just going to hijack the screen right back. So, I am going to come over to this page right here. When you opt into Digital Toolkit, you will receive an email that provides you with login credentials for all the platforms that you enroll in, and we will also send you a list of onboarding items and one of the first items on that list is just making sure that you can access the platform. There will be a link that leads over to this dashboard right here and there is an option here that is entitled, I forgot my password. We don't give out temporary passwords. We will just set up your profile and your website and then from there we'll contact you and we will tell you that you can access it using the email address that you put in your enrollment form.

Shawna Ireland:

But basically, once you log in, it'll take you right to your dashboard.

Brad Murray:

Yeah, so once you reset your password, so day one, this is where you'll come to reset your password. Day two you'll have a password, you'll log into the dashboard and then you'll come to this screen.

Shawna Ireland:

Okay, thank you.

Brad Murray:

I might also just highlight another common day one item and that is updating your profile information. There is a section called *My profile* and you'll see that there's a variety of contact information, titles, there's rooms for headshots, license information, your personal bio, your phone numbers, and your social media handles. So, I feel fairly confident saying that most people that opt into the platform will very quickly find their way into this section so they can start adding their own custom information.

Shawna Ireland:

Perfect, thank you so much. Okay, I'm stealing it back.

Brad Murray:

Steal away.

Shawna Ireland:

So basically, I'll just go through where we are now and we've just highlighted some websites. I did put in the chat the link for the Digital Agent website. And that's the site where you get set up. It has support, what's new, because of course we are always looking for what's the new content. So that's that landing page. And the other page that you'll get the link for is your login, but that's the main page where you find all the information on everything from the Digital Toolkit. So, I'll just pop that in the chat there. So yes, if you have any questions, reach out to Field Marketing and on the Digital Agent site or Digital Toolkit site that I listed, you're going to find all these things, creating content, learning. There are videos that Field Marketing has put up. They've really done a phenomenal job to help advisors do as much or as little as they want on their own and then also providing all of the help one-on-one if advisors need it.

So, with that, I want to remind everybody before we get into a lot of questions that there's a next section which is the same kind of thing where we talk about Hootsuite and DOX, and that's Thursday, the 29th of September from one to two. If you haven't got the email yet, you will be getting it soon. If you have already got it, hopefully you've archived it so you don't have to search for it in Outlook because it's likely gone. When we search for anything and Outlook, I can never find emails. They're in the same place as dryer socks, I'm not sure, but that's the next session. So does anybody have questions? We've had a lot of questions in the chat and Scott and Rachel from Field Marketing as well as I think Brad is fielding some of them right now. Does anybody have any questions verbally for Field Marketing or me, I guess?

Eldon:

Hi, Shawna, it's Eldon. How are you?

Shawna Ireland:

Hi Eldon, how are you?

Eldon:

I'm good, thank you. It's good to see you. Congratulations on the role.

Shawna Ireland:

Good to see. Well yeah. Thanks. Yeah, it's only been about eight minutes.

Eldon:

I have a question for Brad. I put it in the chat. Scott answered it and I guess I'm thinking I maybe didn't word it correctly. So Brad showed how to, he took a blog and went to his LinkedIn page in order to post that there. And my question was, so on my site, well, everybody's site, there's the videos, the little cartoon videos. Are we able to do that with those? I couldn't. Now I wasn't in the digital side of mine actually logged in. I was just looking at it from the, I guess, client view of my page. But are we able to take these…

Shawna Ireland:

You want to share video?

Eldon:

Yeah, I want to share the video to whether it's a LinkedIn or whatever.

Brad Murray:

It's a good question Eldon. So the videos themselves are put onto the page as those blocks or pieces. You can't drive them out to your social media handle in the same way that you can the blog articles, however, you could very easily grab that off Vidyard and put it in your own social media post. I will note that a lot of the *Ask an advisor* videos that we publish, we tend to embed them into the blog articles that they're connected to. So, for example, the *Talking to an advisor for the first time* article that we looked at together, you may have seen that at the very bottom of that article, we actually had embedded that specific *Ask an advisor* video into it. So that would be a means to share the video, but the video itself wouldn't be embedded on your social media. An image of the article itself would be.

Scott:

If I can just... Sorry, it's Scott. If I can just add as well. Great question. That's something, some of this content we want to start thinking about is available across platforms as well. So the videos are actually that get published on the DA site that you can make part of your site. They also do live in the Hootsuite library, which we're going to talk about in a few weeks. So there's an easy way to, if you just want to share the videos themselves, there is a method to do that through Hootsuite as well.

Shawna Ireland:

And that's, I think Eldon, what I was referring to when I answered the question in the chat is I have seen advisors sharing the videos, so that's obviously now that Scott's clarified that, that's where I'm seeing that coming from. It's not coming from the site, they're pulling the videos through. It's being sent through Hootsuite based on whatever they're interested in and they're pushing it out from there.

Scott:

Awesome.

Shawna Ireland:

Sharing those short videos and stuff.

Eldon:
I guess I should look at Hootsuite.

Shawna Ireland:

I guess maybe you should come to the stuff Eldon, I guess. Does anybody else have any questions?

Speaker 5:

Yeah, how does a client access us through Digital Agent?

Brad Murray:

Well, your Digital Agent website is live on the internet and so all they have to do is just go to your web address. In this case, I'll just use the John Doe site as an example. It could be something like advisor.canadalife.com\johndoe, or as part of your onboarding checklist, we can help you register a custom domain, so johndoe.com and set that as the primary web address for your website. Does that answer your question?

Speaker 5:

Yeah, thank you.

Scott:

There's a couple in the chat too. So from Chris, "I'm sure it's different for every advisor, but on average, how many hours or days does an advisor have to spend to set up a site that looks good with some content?"

Brad Murray:

I will speak to the Canada Life advisor site that we looked at together. That advisor has done quite a number of hours of work to build that out, but he's built it out to be specifically what he wanted it to be. The other example that we looked at from the advisor from Windsor, we did just guide him through his standard onboarding checklist. I would say that from start to finish, I think I maybe had three or four separate meetings with him. One where I trained him to use the platform, one where we helped him with his domain, one where we helped consult with him on the various, I would say, branding options that he was able to do for that site. I would average three to four hours, but really when it gets down to it, we can work on it as quickly or as slow as you need. You can build it out at your leisure.

Shawna Ireland:

Yeah, you can. Sorry, I'm just hopping in. But yeah, you can go in and fill out your bio and your photo, some information about you and maybe you don't have a team and you're just a sole proprietor and you can fill out your bio, get your picture, have that curated content and you really don't have to do anything else. So, you could probably get everything done in a couple of hours and you've got something professional and it runs itself, that set it and forget it idea. Or you can spend hours reorganizing it and rebranding it and making it really reflective of yourself. And what's great is if you're super involved in being online and that's where you want to go with your business and you want to invest the extra time to get there, great. If you're not so interested in that and you just really want something to look fresh and clean and have clients be able to find you, then you can do that as well, super easily. Ed had a question? Ed has his hand up, virtual hand.

Scott:

I actually think one hand Abdulla had his hand up before.

Shawna Ireland:

Oh, sorry. Oh, sorry. I can only see one hand.

Abdulla:

Hello?

Shawna Ireland:

Hello.

Abdulla:

Thank you for presentation. I have a question about the analyzing the data at the end. How can we just find out the data of the people have through our website and how can we understand that data?

Brad Murray:

Well, it's a good question. So some of the labels in that dashboard are fairly self-explanatory. Stuff like site view, that means someone clicked on the page and stayed. Reach can mean a variety of different things, just how many people it got to across social media, for example. Bounce rate was another term that was in there that typically means someone that clicked into the website and immediately left. You're more than welcome to reach out to Field Marketing and asked for clarification on these terms as it organically comes up. But I think some of the labeling is pretty self-explanatory and the ones that are not we will work with you on.

Shawna Ireland:

Ed, did you have a question?

Ed:

I have a question in the area of client resources and client logins. On my website there are six sort of logins, group net, GRS and my account sync funds I understand.

Brad Murray:

Yes.

Ed:

Could you just briefly go over VIT Net, Creditor Portal and Constellation? I'm not sure about those last three and my follow-up would be if I don't need them or want them, can I remove them myself or is this a permanent feature?

Brad Murray:

Okay, well, I will speak to the client logins page itself and then I may ask my colleague, Scott to speak to some of the specific links themselves. Now, the client logins page exists as what we refer to as a pre-approved page. And part of what comes with the pre-approved page itself is that it's not edible in its current state. There is a “but” to this comment. There is functionality to access a blank page template within the platform. So, what you could do is you could very quickly recreate the page and then you could remove the content from the pre-approved page that you didn't want.

When I showed the content library where I showed that you could access those videos, there is another section there that very specifically catalogs all of the product, the product service, and the pre-approved content that exists on those pages. So, what I'd like you to think of is nothing's really ever gone on your website in a way. You can even delete some of the pre-approved pages and you could recreate them, but the blocks itself or the pieces of content that are on the page, those can be very quickly plugged in and arranged as I showed towards the beginning of the session.

Scott:

Brad, did you want me to comment on the specific links?

Brad Murray:

Yes. I'm afraid I'm not overly familiar with VIT net.

Scott:

This is going to be slightly embarrassing, but neither am I. So basically the client logins that we chose, we're simply replicating the basic ones from the Canada Life corporate site, but that's something we would obviously love all of your feedback on. If those aren't the right logins for you or you'd like to see something different, there's a couple of things that our team can work with you on creating your own custom page for logins that you want to point to. Or we could be updating this pre-approved page if these are not the right logins for you. So, if you have any concerns with what's included, just reach out and let us know and we'll look at updating the page.

Brad Murray:

Yeah. Okay, thanks. Fair enough.

Scott:

Thank you.

Shawna Ireland:

Sorry. If I could just hop in for a second. We're getting closer to two o'clock. Conversation is great. We're asking a lot of questions. This is awesome. Along with the tools, we're always developing sessions and training and ways to help advisors be able to build their business, especially online. That's one of our huge focuses and we work really hard at it. And my ask is that we have a survey that I'm going to post in the chat and you can just click on it and it's basically a survey about the session, about the tools. So it probably would take you about a minute and a half. So we'll continue on with any questions and comments, but if you really would just click on the survey and do the survey for us so that it will help us with feedback and we can do things differently or offer more. Whatever you need. We're really responsive to what advisors want. So please take the survey. Help us help you. Okay, there it is. The green one. Anyway, continue on.

Scott:

I think that's all the questions in the chat. I think we've covered everything.

Shawna Ireland:

Okay.

Brad Murray:

I actually see a comment here that's asking about charge for accessing Digital Agent. So I think maybe, so you would opt into Digital Agent through the Digital Toolkit program. Now the cost for the platform itself I believe is about $50 a month.

Scott:
Yeah, that's correct. That's $50 per month. There are some discounts available through Digital Toolkit that has really unfortunately nothing to do with this team, so we don't have too many details about it, but if you visit the Digital Toolkit landing page, there's details on the discounts that may apply, but the base price is $50 per month.

Shawna Ireland:

Richard says, "When is the advisor rebranding journey? Should we initiate the Digital Agent?" I think when in the advisor rebranding journey, should we initiate the Digital Agent site? After, so you don't have to redo it. Finish the branding first so you don't have to redo the site.

Scott:

Absolutely. Or if you happen to be one of the handful of advisors that we still have on there that are using the Freedom brand at any time, if you want to reach out to us, if you're currently on your rebranding journey in those cases, we can help you transition out of the Freedom brand on the platform.

Shawna Ireland:

Okay. Do we have any more questions? Chad or anybody want to put their hand up? If not, well I'll give you a couple of minutes back in your Thursday afternoon as long as you did the survey. Otherwise, I'm not giving the five minutes back.

Brad Murray:

Please reach out to the Field Marketing inbox anytime that you have questions about the platform, we are more than happy to give you the detailed answers to your questions to help you make an informed decision.

Shawna Ireland:

Absolutely, and again, I just want to thank everybody for being here and taking an entire hour out of their day and everyone from Field Marketing who's been working all of this stuff, on all of this to get everyone set up, get active online and help everybody get more leads. So with that, I will say thank you so much everyone, and have a wonderful rest of your Thursday and a wonderful Friday and a wonderful weekend. Thank you so much.