Transcript: Hootsuite and DOX demonstration call

Shawna Ireland:

Okay. We got a lot of people hopping on, but we're right at one o'clock so I want to be cognizant of everybody's time. I just want to say good afternoon and thank you for joining us for our second session on the Digital Toolkit where we're highlighting Hootsuite and DOX. My name's Shawna. I'm part of the Advisor Development team at Canada Life and I'm joined by associate manager in Field Marketing operations, Rachael Luby. We're excited to talk to you about how you can boost your digital marketing efforts with Hootsuite and DOX, which are some of the tools you now have access to as part of the Canada Life Digital Toolkit. Again, my name's Shawna Ireland. I'm actually a training manager with Advisor Development. I started as an MA in 2014 and I've been a financial advisor since 2016. I joined the Advisor Development team in June and my passion is supporting advisors in sharing their brand messaging and building their biggest and best businesses. With that, I will hand it over to Rachael to introduce herself.

Rachael Luby:

Thank you so much, Shawna, and thank you, everyone, for joining our call today. I'm relatively new to the Field Marketing team but, as many of you may be familiar in working with Field Marketing, our goal is to support you and to help you generate leads with clients, and connect with your clients and prospects. So everything we do, whether it's setting up some new platforms, creating new marketing materials, we're really trying to help you start those conversations and take them to the next level.

Shawna Ireland:

Thank you, Rachael. Before we go forward, I just want to say that if you're not already muted, could you mute your microphone? We'll have a chance for a Q&A at the end, but just make sure you're muted if you're not.

For today, I'm going to give you an overview of some of the tools and how you can easily incorporate them into your practice to boost your business and your visibility online, and to generate leads. Rachael's going to show you how the tools work and how you can get started quickly and utilize some of the basic features. We're going to then talk about some resource areas that you can go to that include recorded demonstrations, general instructions, and how to get started. After that, we're going to have a Q&A session so you're welcome to type some questions along the way in the chat. We're going to have some people from Field Marketing managing that, but there will be a chance at the end for us to have a live Q&A.

With that said, we'll roll forward. To be blunt, the days of being successful without at least being visible in the online space are coming to a close. Many firms and advisors have long built successful businesses without being searchable with just a handshake and an in-person meeting. However, over the next two decades, the baby boomers we've built entire companies to serve will transfer trillions of dollars to their younger family members, family members who aren't so trusting of just a handshake and a paper business card, family members with access to unlimited education and advice at the click of a button. The generation set to inherit the world are highly educated, tech-savvy, and they demand access to financial education and advice from professionals they can vet on their own. To build your business for the next 20 years, 30 years and beyond, you must focus on one thing: building their trust, building it early, and building it often.

Here's the thing: we know you. We've heard how you've helped a widow keep her home, and keep her kids in school and hockey lessons with the insurance you protected them with. We've heard about family businesses that have transitioned seamlessly so the Thanksgiving after their parents pass away, everyone shows up to dinner because nobody's fighting. You take people who joke about never being able to retire and you have them retiring early with no alarm clock, living life on their terms. We know about the people keeping their homes and taking the time to heal properly after serious diagnoses because, frankly, while everybody else is showing up with get well cards and flowers, you're showing up with big fat checks.

We thank you for that. We know you're amazing and that you change lives every day with what you're doing. You're the reason we're all here. Everything is built around the impact you have on people's lives every day. We know. We want you to tell them, and we're here to support you in doing just that. We talked a couple weeks ago about Digital Agent, which is the fastest, easiest way to get a robust, professional site, and get online to showcase your business to your market. This session is going to focus on the other two tools that bring that all together: Hootsuite and DOX.

Hootsuite is really the tool that's going to allow you to talk to and engage with your audience to really show them who you are. I can guarantee you if you’re not talking to your prospects, someone else is. If your goal is to increase your leads, get referrals, get the appointment, the importance of Hootsuite can't be understated. You know what a lot of advisors tell me? "I don't really care about having a huge social media following." Frankly, neither do I, and I never did. I started using these tools a few years ago when I was new. My business wasn't awesome. I didn't have a lot of leads being generated. I felt like I had a lot to say and a lot of passion, but I didn't have that many people to listen. So I started my Instagram and Facebook accounts with just a few followers, but within weeks I had people messaging me to book calls and appointments.

With a small following, I focused on only three things: getting clients, showing clout, and building community. That's all I talked about, and in a really simple way. It worked. I netted new leads every week with simple shares and educational posts, posting nice questions, posting things for people to think about. And because I was clear about what I do, who I want to work with, and what my process is, prospecting calls became amazing because most leads already knew me before we even had our first call. Prospecting became easier and more effective because I knew the people that I was talking to had already engaged with something on my socials, so it was like a warm lead. It can work and it does work. If used correctly for every market at every business level, your social media is your PSFY (positive support for you) that never sleeps.

How does Hootsuite fit into all this? Hootsuite is bar-none the easiest way to post. They're the top content scheduler in the world and it's for good reason. Its function is basically to streamline the process of creating posts and interacting with your audience. You can schedule your posts once a week in 15 or 20 minutes and be active every day. But let's take a step back because we want to talk about, "How do I put this into my business easily?" When you sign into Hootsuite, Rachael's going to show us, you're going to see right away on the left-hand side in the Amplify section a suggested stream of posts – some third-party, some from Canada Life – but content that you can share right away.

You can also create your own posts in seconds with stock photos, gifs, links, and videos provided all inside the platform, and you don't have to bother sharing to one platform at a time. With Hootsuite, you can share to multiple platforms at one time with the same post. It's going to automatically format the post to appear properly everywhere. Just like Digital Agent, it can show you either basic analytics or really detailed analytics so you can see which posts are doing best and where, so you can do more of what works. You also have access to boosting content with ads from Hootsuite if that's something that interests you as you move along in your business.

Just like Digital Agent, if you want to take a more passive approach, you can just pull from the library and share and engage as you can when it fits your business. But if you're in business-building mode and you want as many discovery calls as you can possibly handle, you can get set up with specific dashboards and analytics to see everything that's happening, engage with your content, manage comments and inboxes all from the app. You can also set team permissions to have someone else build your posts and they simply tag you to review the post or add a comment before they schedule it in your calendar. It's really as easy as that.

At the end of the day, what does this all mean?

- Basically, it means growth. Even established businesses need to deal with attrition and they need to prepare for the coming transfer of wealth, and so being online is a really important way to do that.

- Secondly is relevance. As the next generation of advisors and planners are looking to join with firms and team up, they're going to be looking for the people who have a presence that's going to help them build their business further.

With that, I'm going to hand it over to Rachael who's going to give us a demonstration of some of those things that I talked about in Hootsuite.

Rachael Luby:

Perfect. Thank you so much, Shawna. I'm just going to share my screen here. Let me know when you can see that.

Shawna Ireland:

All good.

Rachael Luby:

Perfect. Just before I show you Hootsuite, I just wanted to quickly touch on sign-up. I know that's going to be a question in the chat. As Shawna mentioned, Digital Toolkit is typically the way you're going to go. So for any self-branded advisors on the call, any sole proprietors, you're going to follow the Digital Toolkit sign-up process to opt into Hootsuite. If you're a Canada Life Foundation advisor on the call, you already have access to these tools as part of the Accelerator program and those credentials would have been emailed to you, but please email Field Marketing if you haven't seen the email, or might've lost it. I know there's lots of emails flying around these days. Please let us know. We'll make sure that you can get in and access your account.

When we log into Hootsuite, your view is obviously going to look a little bit different. We're logged into the Field Marketing account. We don't have Field Marketing channels yet. Who's to say that won't happen in the future? But once you connect your profiles, so, say, LinkedIn, Facebook, Twitter, you're going to be able to see your streams right here so you can see what's happening on those channels for you. You can also monitor messages that are coming in through those channels as well and respond to those messages right in Hootsuite. The area that you're going to spend most of your time is looking through the Amplify library right here. There are a few ways that you can browse the content. Many advisors just look through all of the content that's available. Content is added on a regular basis, and now what you're going to see is a lot of third-party content as well, so really those kind of education and thought leadership pieces that you're going to be able to share.

You're also going to be able to see Canada Life content in here, product content. There's all sorts of content available in English and French. Again, if we look at some of the categories, depending on what you're interested in sharing with your clients, you'll be able to decide from that. Say you want to talk about saving and investing, maybe you'll navigate over to this category and then you'll be able to choose how you want to share that post. Like Shawna mentioned, you can share it across your channels, you can share it for certain channels. Say your lifestyle content works better on Facebook, maybe LinkedIn is more of the planning for retirement-type content, you can base how you share on that and then you can schedule it in advance as well.

We find advisors have a lot of success when they kind of think about, "What's my story over the next couple of weeks? What are the posts that I want to share?" That kind of saves some time down the road. Instead of having to pop in every day and say, "What should I share today?" It's looking at, "What is that long-term strategy?" Again, there are French categories as well. The content is all separated by language here in the tool. If I go back to all of the content that's available, you can filter by languages as well.

The other thing that Shawna mentioned is analytics. Again, your dashboard might look a little bit different, but once you start interacting on Hootsuite and scheduling your content you'll be able to get a sense of how it's performing and what the impact of those posts have been. You can create all of your own custom reports. These are some of ours that we have. What we can see when it comes to posts is how are these post performing with you and your prospects. You'll be able to get a lot of really great data once you start interacting in the tool. I'll pass it back to you, Shawna.

Shawna Ireland:

Thank you, Rachael. After Hootsuite, the other thing that we know is that when it comes to building relationships with your clients, we know that you want to deliver the right materials to the right people at the right time. You can do this with DOX. This is the other platform. Basically, it's going to be for sharing leave-behinds that you can personalize. With DOX, you're going to get access to new materials added monthly and it's basically a brand-in-a-box selection of letterheads, business cards, envelopes, and ads to help with those that are self-branded or those who are going to be transitioning your brand. This is going to be an easy lift for your admin side to get branded and get all those base pieces done quickly. Also, all the materials are already pre-approved and fully compliant so you don't have to worry about any of that. It's also a mobile-friendly tool, which is great.

Basically, what does this mean for your business? You're going to save time by exploring the catalog and creating personalized materials in a matter of minutes instead of taking more than an hour like it used to be. The process previously used to take a long time for anybody who's been around that long, but it used to take days when the team had to manually make everything and send it all out. You save a lot of time there, and then also you can save cost as well by using the materials digitally, and that's really important. A good example of that might be email marketing. If you're doing email marketing campaigns that are great for the pre- or post-retiree market, you can use these as a circle back to existing clients as a touchpoint.

You can use these materials and graphics as an add-on to your requests for review appointments, and you can also use this in seasonal campaigns if you're talking about RRSP season, or in September, I always like to do something about RESPs and back to school. All these kind of things you can use in DOX digitally, which is a nice way to marry having paper leave-behinds and brochures that we still love to bring to clients and are still super relevant with utilizing the online space and the digital space as well. There's ways to do both with DOX, and I think incorporating both are really important. With that, I'm going to turn it to Rachael to just give us an overview of what this looks like.

Rachael Luby:

Wonderful. Thanks so much. All right. I'll jump back to sharing my screen. Again, just to touch on the sign-up process, so DOX is very similar to Hootsuite. Again, if you're in Foundations you're going to have access to that already. When it comes to self-branded advisors, it's a little bit different. DOX is a free tool so it's actually not part of the Digital Toolkit sign-up, so we've kind of stood up our own sign-up process for DOX. It only takes a few minutes to fill out, and then we're going to email your credentials to you. Again, the same goes for Foundations advisors, so couple of steps for you and then you'll be running and good to go with all the materials.

We've got two different DOX sites: one with Canada Life-branded materials for those Foundations advisors, and one with self-branded materials. Let me show you both. Once you get your login information and credentials from Field Marketing, this is what you're going to see if you're a Foundations advisor. You're going to be able to interact with some of the featured items that we have. Anytime we add a new piece, it's going to be featured right there. You can also get a sense of what other advisors are ordering on the tool. Then we've got some links to some of our helpful resources that Shawna's going to touch on afterwards.

The best way to describe DOX is that it's very similar to Vistaprint. For those that are familiar, you're kind of looking through a catalog of materials that are available. You're going to look through the marketing materials section and then you can kind of decide what you would like to personalize and customize with your information based on your needs, so based on where you're interacting with clients. Let's say you're liking the looks of this one here, you can preview the file before you decide to customize it just so you can read all the content. If you like how that looks, you can customize it. It's just a few clicks and you'll get a personalized piece that you can use with your clients.

You'll see there's different levels of customization in DOX depending on the piece. It's very automated. So a piece like this, you don't have to click anything and you're going to get a really nice branded piece with your headshot, your contact information, all that good stuff. But then there are some pieces where you can kind of do a custom bio, you can choose an image, different things like that, so really depends on what you're looking for, but you're going to find different options like that. If I move over here, let's go to the profile section. Say you want to customize this piece here, now this is a piece where you get to do a little bit more customization and you get to kind of choose your bio, choose a couple of contact numbers that you want to have on the piece. Just click next here and you can look at that proof.

So again, similar to Vistaprint. You're adding it to your cart, all the materials are free, and then you kind of just go through the checkout process. Again, you can take a look at that piece and say, "You know what? I'm going to fill this space. I want to add some more information about me." You can go back and edit that piece. But again, a really nice branded piece that you can use with your clients. I definitely invite you to take a peek at all of the materials we have. We also have a *View all materials* section just to make it a little bit easier for you to see everything in one place. There is certainly lots to explore and lots that we're adding on a regular basis.

The other thing I want to point out is that if you're a French-speaking advisor, you'll be sent directly to a French login page and when you land here, all the materials will be in French. At any time, you are able to toggle over to the French side of DOX and interact with all those materials as well. You could actually, if you're bilingual, customize an English piece and a French piece and get it sent to you. The way it works when you add those pieces to your cart, you'll follow the few steps and then it'll email you those pieces and you can use them exactly like Shawna said. You can use them digitally, you can send them to a printer to get them printed. However you see fit, you can do that.

Just quickly, I'm going to pop over to the non-branded site. Again, virtually all the same materials you have access to, but these are for self-branded advisors so your logo, your brand is going to be appearing on these pieces. Now, Shawna mentioned some pieces like letterheads, business cards, that kind of stuff. This is a whole brand-in-a-box section that we've added particularly for advisors that are newly transitioning to their own brand or joining a firm. This is a really great way to kind of have those key pieces you need to communicate with your clients and say, "Hey, this is my new brand. Check it out, take a look." Let me show you what one of these ads looks like. Let's say we want to customize this standard ad here. Continue on. We're starting to add color options to all of our pieces so if your logo and your brand really embraces green, you can have that on all of your pieces, so a new feature that we're really happy to have in the system here.

Again, you can write all of your own content if you'd like to. Then, say, you go along here, you can take a peek at that proof and see if it's working for you. Again, it'll automatically pull all your info in, it's got your brand color there, it's got all the appropriate disclaimers, no need for compliance reviews, really great in just a few clicks. Then let me just see if I can show you another piece that has some image options because those are quite fun to work with. We're really trying to have a variety of pieces where you can highlight your target audience in them, you can really capture that and speak directly to them. Let me find this goal-setting worksheet. I think this one might have some image options here.

Something else we really like to hear from you is what pieces do you want to customize that aren't currently available in this tool? We would love to know because we want to be able to add those and to be able to add the features that best help you connect with your clients. Again, this is a piece where there's some more customization of colors and images. For Foundations advisors on the call, this is something to look forward to as you begin your brand transition, too, at the end of the Foundations program, is having these additional options. So again, a really nice branded piece that you can use however you like with your clients. I will leave it at that, Shawna, pass it back to you.

Shawna Ireland:

Thank you so much. I actually didn't realize about the brand colors. That's awesome. That's new to me.

Rachael Luby:

New features, yes. So exciting.

Shawna Ireland:

New features all the time. I like it. We know how I feel about brand colors. I'm a big fan. With that, that wraps up the demo and explanation sections for Hootsuite and DOX. Before we go into some resources and then a Q&A, I wanted to highlight that we have a series coming up in November, December. What it is, is called Social Selling Series and you'll see the communications come in your news bundle emails so look out for that. It's basically going to be two live sessions where we do a deeper dive into social media with some case studies, one of a newer advisor and one of a more seasoned advisor who's transitioning to self-branding.

We're really going to be looking at that in a case study perspective and we're going to be leveraging some of the learning from the Hootsuite Academy, so along with these sessions you'll get free access to three courses from Hootsuite Academy. If you're interested in diving deeper into social media and really getting a more robust online presence, especially if you're interested in prospecting, these are sessions that you should attend and some learning that you should do, so I wanted to highlight them. You'll see it coming in the communications in the coming weeks, but just wanted to highlight it because it's a deeper dive into what we talked about today.

With that, I'll move on to some resources. Like Rachael said, you can always contact Field Marketing, but there is the Digital Toolkit site and that has all of your sign-ups. They have demonstration videos, they have intensive amounts of how-tos. You can search just about anything, and you'll find a how to do it for Digital Agent, DOX, Hootsuite, all kinds of stuff. There are also the guidelines, of course, for marketing your business, communications toolkits, best practices, as well as the advisor brand toolkit so there's a lot out there. If you need help or have any questions, you can always contact Field Marketing and, obviously, your BDA array. We're all here to help you to build your online presence and make your business even better.