Transcript: Boost your digital marketing efforts with Digital Agent, Hootsuite and DOX

Rachael Luby:

Good afternoon. Thank you so much for joining us. My name is Rachael and I am part of the field marketing team here at Canada Life. We're super excited to talk to you today about how you can boost your digital marketing efforts with Digital Agent, Hootsuite and DOX, which are some of the tools that you now have access to as part of the Canada Life Digital Toolkit.

I'm going to give you a quick demonstration today of our tools and we're going to try and leave it short and sweet. If you have any questions during the presentation, feel free to pop them into the chat. My colleagues, Scott and Lucy are here from field marketing and they're happy to answer any of your questions. We also have a Canada Life Digital Toolkit rep as well that can answer any questions about the toolkit program or the pricing of the tools. We'll make sure to share this PowerPoint after the session so you can learn more about our tools and sign up for them. Yeah, so let's get started.

Out of the many new exciting tools that you now have access to as part of Digital Toolkit, there's a few that are managed by our field marketing team that we'll be showing you today. Some of you may already have these tools, so this might be a bit of a recap for you. But what I really want to do today is really high level highlight what the tools are, how they can benefit your business, and how easy they are to use.

Let's get started with Digital Agent. This is a website builder that you can point clients and prospects to and gather leads from. We offer loads of articles, videos, images, and campaigns that you can choose to share. Hootsuite is a social media management tool where you connect your social media channels and then you can share and schedule content. So similar to Digital Agent, we provide a library of posts that you can share, but you can also write your own content as well.

We are also excitingly in the process of connecting Digital Agent in Hootsuite. So that means every time that you publish an article to your Digital Agent site, a social media post will automatically go out through Hootsuite onto your social media channels. So it's really creating that 360 experience.

And then finally, DOX. This is where you can create personalized marketing materials with your contact information and your logo if you're self-branded or with a firm. And then you can share these marketing materials with clients and prospects.

It's a free tool and it's very similar to Vistaprint for those that might be familiar with that platform, but it's all digital delivery. So we really encourage you to share these materials through email, through your website, through social media, but you can always send them to a printer as well.

So what is a benefit to all three of these platforms? They're going to create efficiencies in your business by automating a lot of the work for you and providing you with relevant and compliant content. Some advisors actually spend on average 40% on administrative tasks. So these tools, because they're so very automated, they're going to cut down on that admin time significantly, and they're fully supported by our team and by Canada Life. So that means we're going to be constantly providing you with training resources, new content and enhancements and new features on a regular basis.

So in terms of access for any foundations, advisors, so Canada Life Foundation's advisors that may be on the call, you already have access to these three tools as of today, and your login credentials were sent to you a few weeks ago. If you missed that email, don't worry. Please get in touch with us. We'll make sure that you're all set up there.

For self-branded or former Freedom Advisors on the call, there's a new opt-in process through the Digital Toolkit program, and that's where you can opt into Digital Agent in Hootsuite. If you complete your enrollment by July 29th, you're going to get your last month free on your tools, which is a really exciting promotion. And then DOX is a little bit of a separate signup process through field marketing. But don't worry, all of the links are going to be included in the presentation, so you'll have access to those after the call.

Let's talk a little bit more about Digital Agent. A fun fact is that 93% of all purchase decisions start with an online search. So having a website is really key to building your online presence and being found online. Digital Agent helps you achieve that by offering at least two new articles published to your site automatically every month. One new video published to your site every month as well with a really fun ask and advisor type theme to get your clients thinking about talking to you about certain subjects like buying a home, buying a pet, different topics and lifestyle pieces like that. It's a fully compliant site and any custom work that you do, like maybe you want to write your own blogs, that's reviewed by our team to ensure it's compliant. It's a site that offers search engine optimization to help you get found online in your region. It's mobile friendly and there's a ton of analytics to show you how many people are visiting your site and what content they're engaging with the most.

So what does this mean for your business? You can have a set it and forget it model where your website is always remaining current and fresh with new content and all that work is happening in the background automatically by us. So again, creating those efficiencies. Or, and you'll find this with all three platforms, if you really like creating your own content, it's really easy to do so in the tool. Drag and drop to move stuff around on your site. Very easy to create content, create events or polls that can help you engage with prospects. So let me show you what a Digital Agent site looks like outside of the box.

So if you're a Canada Life Foundation's advisor, this is what your site will look like. Anything that you see can be customized. So maybe you want a different headline, a different image, you want to add your headshot and a bigger bio here that can all be customized here to really make it feel like your own site. Again, we've got some forms in here, some videos that can be embedded on the page and everything at the bottom to cover you from a compliance standpoint. We've also got the advice page, and this is where I was talking about you get those two articles per month automatically published to your site. This is where they're going to appear, and it's just keeping your site really current and fresh about topics that clients and prospects may care about. So when you're clicking the read more, very easy ways to share that article and lots of information here to really establish you as a thought leader.

On the self-branded side, again, very similar template. You can take it a few steps further with your own company logo. Maybe your color is more, you've got some yellow in your branding and you want to incorporate that instead of the gray here. All of that is possible on Digital Agent. And again, you're able to customize the homepage in any of the pages as you see fit. Lots of different topics that you can share with folks, and again, the important part of collecting those leads on the contact page. So I will just jump back to the presentation right now. Again, I mentioned very high level, very quick, but don't worry, we'll leave time for questions at the end.

So now we're going to talk about Hootsuite. So being active on social media is an essential way to reach your customers, gain valuable insights and grow your brand. Hootsuite helps you discover and organize social media content. So with Hootsuite similar to Digital Agent, you'll get a library of content that you can easily share on your channels. The social media posts that we provide are organized by topic, which makes it really easy for you to find and share things of interest to your unique audience.

There's a variety of content. So from head office campaigns to third party thought leadership pieces, a lot of lifestyle or did-you-know type posts as well, and some of them have videos attached, some of them have images. So really rich options available in the Hootsuite library. And then of course some analytics to show you. Again, how many people are engaging with you on your channels? What kind of content is working and what maybe isn't working and you should remove from your strategy? So those are really helpful pieces of information to know. So again, what does this mean for your business? So again, that set it and forget it model, you can go in and select the pieces you want to share and it's done automatically, or if you want to start creating your own piece and your own marketing strategy, very easy to do so in Hootsuite. So let me jump over to Hootsuite here.

So when you log in, this is what you're going to see here on the homepage. I'll just go back to the homepage here. Now, field marketing doesn't have social media channels, so yours will look a little bit different, but basically what you're going to do is by getting started, you're just connecting the social platforms that you want to connect here in Hootsuite. So if you've got an Instagram and a Facebook page, those are the ones that you would easily connect and you just follow those steps there. And then the Amplify Library, that is where all of this preloaded content exists. So lots of ways to search through the content. I mentioned that there's tons of topics here that you can explore separated by English and French, and then you can even just search all of the content that's available. You can also search by keyword as well. And then once your channels are connected, you would simply click share and then you'd be able to decide which platforms am I sharing it to? Am I sharing it now or am I sharing it later?

Once you start scheduling content, you can take a peek at your calendar to get a sense of how many posts do I have scheduled for this week? Maybe you had 10 posts last week and one this week, you might want to think about adding some more posts. So this can give you a really helpful view of your strategy, and again, what's working and what's not.

And finally, I did mention those analytics. So same thing, your view will look a little bit different depending on what you have connected, but you're going to be able to see again the types of impact your posts are having. So how many posts have you published? What type of topics are working best with your audience? Who's sharing that content? And again, just looking at all of those link clicks and those really valuable pieces of information.

So jumping back here, moving on to DOX. So when it comes to relationship building, we know it's key for you to deliver the right content to the right people at those key times. So you can do this with DOX by sharing personalized leave behinds. So these are nice marketing materials that you can feel like you own. So with DOX you're going to get access to new materials added monthly. There's a brand in a box selection of letterheads, business cards, envelopes, and advertisements to help with those who maybe have self-branded recently and really want to promote their new brand. All of the materials are pre-approved and they're fully compliant, so you don't need to take the material and send it to field marketing or anyone else. It is fully compliant in that system and it's a mobile friendly tool as well. All three tools are mobile friendly, so you can do it on the go, which is really great.

So again, what does this mean for your business? It means you can save time by exploring our catalog of these personalized materials and you can create these materials in a matter of minutes. So those that are familiar with working with field marketing in other areas, this process of getting a personalized material would often take days, and now it can be done in a matter of minutes. It's very automated, which is wonderful. Obviously, if you're choosing to do digital, you can save costs by not printing these and these are really effective pieces that you can share digitally. And again, what's different from Digital Agent in Hootsuite is that DOX is a totally free platform. So please use it. Please sign up. We definitely want to have you on it. So let me show you what some of those materials look like. Pop out of Hootsuite here.

So once you're all set up for DOX, you're going to get a login and then you'll sign in. I'm going to show you what the Canada Life materials look like. Those that are self-branded or with a firm, your materials will look similar, but they're going to have your logo in your brand on it. So once you log into DOX, you're going to see some featured items here. Maybe you'll also see some popular items that other advisors are ordering that you can interact with.

You're primarily going to be looking at the marketing materials section. So this is what we call our catalog of materials available. So say you want to advertise in a digital magazine soon and you want to take a peek at the advertisements we have. So you can see the list of materials that are available here. Say if you like the looks of this one, you can preview the file to see all of the content up close and see, "Yeah, I really want to customize that piece." And then you simply hit customize and follow the steps outlined. So again, a very automated system. We have all your information, your bio, your website link, all that kind of stuff in the background, and it just automatically pulls right into the piece. I'm going to zoom in here. We've just got some mock advisor information in here just for illustrative purposes. But again, your title, your name, your designations, and your key contact information are pulling right into the piece.

So similar again to Vistaprint, you're going to add it to your cart. You can kind of save it and continue along with browsing or go to your checkout. When you do check out, again following the steps, you'll get email versions of all of the materials you choose to customize and you'll be able to do whatever you want with those afterwards. So let me show you one where you have a couple more options here. So say you want to get a piece about mortgages and share that with some clients. So again, we're going to go customize and continue. And say you want to choose a headline here, so let's do this middle one here. Go next, and then you'll be able to see again how that looks in your piece. So that's that headline pulling in. Again, the key information is pulling in as well.

Again, if you're like, "You know what, I want to change the headline and write my own," then you can certainly do that as well. So lots of ways to interact with all the pieces. The last one I'll show you is more of what we call a download. Say you want to get a social media image. So these ones are a little bit different. For those that are self-branded, there will be a customized button because your logo's going to pull in, but for some of these ones you're simply just going to click the one here and then click add to shopping cart. So you're really going to find a variety of downloads of really highly customizable pieces or really automated pieces here in DOX, but a big variety for you to take a peek at. If you want to see everything that's available, there is a view all section as well that shows you all of the pieces you have access to.

So I am going to jump back to the presentation. So again, these are our tools at a very quick glance. I know that was quick. It's hard to do a deep dive, but we really appreciate you listening. In addition to our tools, we also have some resources to help you build a digital presence, create a marketing strategy, and ensure any custom content you're creating is compliant and good to go. We also know that brand transition is a huge focus for Former Freedom, 55 Financial Advisors and Canada Life Foundations advisors on the line. So the advisor brand tool kit linked here is going to be a great resource for you. And if you sign up as a Freedom or Canada Life advisor, once you transition to your own brand or you join a firm, we can easily help you update the tools so that they reflect your new brands. You don't have to go and sign up again and go through that process. We make that easier for you.

So that is all I have. I know I flew through that presentation and the tools, but we really wanted to keep it high level just to inform you of what the tools are, how they can benefit your business and how you sign up for them. So if anyone needs a bit of a deeper dive on these tools, please email us and we'll look into setting something up, especially if there's a lot of demand. But I just want to quickly recap before we open it up to questions.

So foundation's advisors, you do have access to all of these tools as of today. Please email us if you're missing or logging credentials. If you are self-branded or part of a firm or if you're freedom aligned as well, you can opt into Digital Agent and Hootsuite using the Canada Life Digital Toolkit signup, and then DOX has a separate signup through field marketing. And remember, if you're enrolling in Digital Agent in Hootsuite by July 29th, you'll get your last month free. So we would be happy to take any questions that you may have now just because I know there's quite a few folks on the call. If you can maybe just raise your hand, then we'll call on you and you can unmute yourself and share your camera if you so choose. Thank you.

Scott MacDougall:

Thanks so much, Rachael. We do have a bunch of questions in the chat. I've tried to answer a few of the simpler ones, but I will run through some of those with you. But before we do that, we do have someone's hand raised. So Paul Petras. Oh, I'm sorry, Paul, I'm going to mess up your last name.

Paul:

I'm used to that. Somebody may have written this in already, but okay. I've got a corporation with a principal and two associates. So for Conquest, I'm assuming we each have to pay 120, or is it just one fee for the company?

Scott MacDougall:

I'll go ahead and take this one if you want, Rachael.

Rachael Luby:

Yeah, I mean if Ben Gosselin is on the line, he might be able to speak to that easier.

Scott:

Yeah, I was hoping Ben was on the line.

Ben Gosselin:

Hi, I heard the Conquest question. I'll just answer it quickly. So the $120 per month, that is at the advisor level, so if there are three advisors in the firm and using it, each one would need to pay for it. But this call particular is about Digital Agent, Hootsuite and DOX. So I'll make sure the next 10 minutes are focused to that, and then you can reach out to me if there's any digital toolkit questions outside of these tools.

Paul:

Okay. Can I ask another? I did have a question about the Digital Agent.

Ben Gosselin:

Of course. Sure.

Paul:

I don't want to hog it. I'll ask real quick here. So that is basically a complete website. So I have a website, I would cancel that, you guys would manage that whole new website at 50 plus tax?

Rachael Luby:

Yeah. So again, we kind of have it set it up where you can do a set it and forget it model where if there is some content you want to move over, that's really easy to do. We can work with you on that. But really, you could do absolutely nothing with the site once you sign up and it's still going to be fresh with new content. If there is anything else that you want to do, we do have some resources to help guide advisors on how to add a new page to my website, add some new content. But again, right off the bat we do try to assist with that.

Paul:

Okay. And basically I could sign up anytime.

Rachael Luby:

Yeah, so there is an enrollment process happening right now through Digital Toolkit. So ideally we're really encouraging advisors to do that before July 29th, but I know that you can sign up at any time through that process.

Paul:

Okay, thank you.

Rachael Luby:

No problem.

Scott MacDougall:

Thank you. All right, so first question in the chat from Rick is, could you please elaborate more on how this service helps with search engine optimization? Do you want me to take that one, Rachael?

Rachael Luby:

Yeah. That would be wonderful.

Scott MacDougall:

Sure. Yeah, great question, Rick. A couple of basic things. We work with the vendor, so Digital Agent's through a vendor called Veriday, and they manage the sort of backend technology to make sure that all of these sites are being indexed properly with Google search. So it just ensures that that's like... If you sort of create your own website, if you use Wix or Blogger or something like that and you want to manage your own, there's extra steps that you need to be taking to make sure it's indexing with Google properly. I honestly don't understand how that works myself. That's not my area of expertise, but I know that the vendor we've chosen, we've verified with them that this is something they're doing so that it is being indexed appropriately to make sure you're being found and they actually have a really cool feature.

In the early days, one of our concerns was if we have 4, 5, 600 advisors using these websites, we're sort of competing with ourselves in these markets for search end optimization, the vendor actually uses something called Google Local Search. It's a feature that they've taken advantage of. So if you are in, say the community of Halifax, Nova Scotia and someone in Halifax searches the internet and says, "I need to find someone who can sell me insurance," all of your colleagues who are in Ontario and out west, none of those are actually going to come up. This search is only going to grab... Google Search is only going to grab advisors in that local community.

So it's going to help push you to the front for anyone who's in your local community searching for an advisor. The other big thing is just with referrals. People are out there giving you referrals and someone's going online and just looking up your name, and having a website under your name or under your firm's name that's easily findable through Google Search is just going to help with those referrals as well because we do know now that something like 80 plus percent of people are actually looking you up online before following through on a referral with a phone call.

Rachael Luby:

Perfect.

Scott MacDougall:

Alrighty, next question. Okay, let's see. We answered that one.

Rachael Luby:

I will say as well, if we don't get to all of the questions, I will go back and answer them in chat after the call. I know it was a really tight timeline today, folks, so we appreciate your patience.

Scott MacDougall:

Are you going to do a detailed demonstration for each one of the applications soon? Yes. We don't have specific dates for that, but we are working very closely with our training team, particularly the team that manages the accelerator program to look at having both, and I know this won't impact everyone on the call because you've already gone through it, but there will be more robust sort of training and demonstrations and accelerator. And then we're also going to do some sort of post accelerator detailed demos and presentations that everyone, all of our advisors, are going to be invited to. So don't have dates yet, but absolutely in the coming months we'll be doing demonstrations of all of these.

Oh, this is a good one for you, Rachael. This is about DOX. Canada Life website currently has brochures, one-pagers, et cetera. Will these still be available?

Rachael Luby:

So those, from my understanding, aren't going anywhere. What we're really trying to do is work with other areas of the company and move as many materials over to DOX as we can. DOX is a relatively new system. We just launched last year. So we started with a lot of materials that were really popular and ordered often in field marketing, but you will find over time we are going to look to make those other materials that exist elsewhere personalizable in DOX. That's the goal. There's combined strengths as well. There's lots of materials available, but they're not customized or personalized and we know that advisors have been asking for that. So to answer your question, those aren't going away. If they do end up moving to DOX, we'll make sure to loop in advisors and let everyone know when that new content is available in DOX.

Scott MacDougall:

One of the advantages to DOX over website, and one of the reasons we want to try and start moving a lot of this content over is that you can personalize it now. Whereas on website, you're just getting sort of the company branded pieces, whereas if this same content, when we're able to get it moved over to DOX in a lot of cases, you'll just have more options to personalize the material.

Another to that question from Chris Hudson, do we use DOX to get third party or industry pieces we want on our website or in Hootsuite? Do you want me to take that one?

Rachael Luby:

Sure.

Scott MacDougall:

Sure. So I guess the answer is sort of in some cases like we are creating some design pieces for DOX that are usable on social media in particular. What I would say is our long-term goal and what we're working towards right now is to make this sort of a family of tools that is as easy as possible for you guys to use. So we don't want to put something in DOX and then tell you, "Okay, now grab this and go put it on your website."

If this is something that we think is a strong piece for your website, it will be on the Digital Agent website and available in DOX. So it's not like you have to move things around between the platforms. We're really looking at creating campaigns now, so every month there'll be a theme and you'll find there's going to be material in all three platforms, and it's really going to be up to you to choose what you want to share, how you want to use it, thinking about your demographics. So I guess the short answer is there's going to be material available on these topics across all three platforms. You're not going to have to move back and forth to get it. You'll be sending out the link for DOX. I assume, Rachael, we're going to send out the link for everything at the end of the call?

Rachael Luby:

So there's a few questions about if the call is being recorded. That's good. It's being recorded. The presentation will be sent out, so you'll have links to all of the tools to learn more and to sign up for them. So all the signup links will be sent out as well.

Scott MacDougall:

Yeah. All right, perfect. Elizabeth, I know that you've got some questions just about the sort of types of tactics in DOX. I'm going to take that one offline and I'll send you an email about that, but we're aware of some of the concerns with being able to share content and we're working very hard to address that and make sure there's content that's going to work for everybody across platforms. Victor asked, is there any way we can set up our website so clients can book meetings on it?

Rachael Luby:

Yeah. I don't know if you want to speak to that one, Scott.

Scott MacDougall:

Yeah, absolutely. So in the basic website that you get, there's actually a contact page that has a form that clients can fill out. We also are working towards making that form easy when you share content, so they don't even necessarily have to come back to the contact page. So there's work going on. There are also third party tools like-

Rachael Luby:

Calendly.

Scott MacDougall:

Calendly, thank you. I always forget the name of Microsoft Booking. Yeah, there are actually widgets with those tools that you can add to your Digital Agent site. We've done that for a handful of advisors and we have people here at head office that can sort of support you in setting that up if that's something you want to set up. So we'll actually walk through how to get your Calendly account set up and attach it to your website for you.

How do these tools compare to Advisor Stream or FMG? I can answer this one if it's okay.

Rachael Luby:

Yeah.

Scott MacDougall:

Advisor Stream I'm familiar with more. So I would say relative to those tools, those tools are giving you access to a lot of third party content that's really top of the funnel and very generic. With a Digital Agent website in Hootsuite and DOX, we're crafting content. We have multiple marketing communication specialists and designers that are working on this content on your behalf. We're it's compliant to your practice. We're making sure it's on brand for those of you that are using the Canada Life brand or is brand agnostic, for those of you with your own brand, and it's specific to the products and services that you're selling.

It's also going to be connected to our national campaign. So whenever you see a national campaign out in the marketplace about, I want to say responsible investing or anything like that, you can leverage the sort of impressions we're getting with Head Office's national campaign by having complimentary content for your website, social media, or to as leave behind for clients and stuff like that. So I guess the answer is this content is curated for your business, whereas Advisor Stream is curated for just a general advisor audience. Where can we find the resources, Rachael? We're just going to send out links to all of these resources after the call.

Rachael Luby:

Yeah, and then I was thinking the last one maybe can be about Hootsuite here. So can we edit the content in the Hootsuite library? And yes, you can. So even if we have provided it, if you want to share a post that we've provided, you can edit the copy, you can edit the link if you want to link somewhere else. You can really do what you want with it. We just provide it as a baseline for those advisors that might want to just shoot it out as is. But yes, all that can be customized.

Really the goal with all three of these platforms as you can see is personalizing, customizing to make it your own and to really help you connect with your target audience. So we are at time. I do want to try and be mindful of everyone's time today. As mentioned, I will share out the presentation. The recording is going to be shared in a communication going out. I'll get more details on that and make sure everyone has access to it. Just a reminder to sign up for the tools. We really hope to see you sign up through the Digital Toolkit program and thank you so much for listening today. I will make sure to answer any questions in the chat that we didn't get to. Thanks so much everyone.