5 Ways to Drive Social Program Adoption

HERE ARE 5 WAYS EXPERIENCED MARKETERS HAVE OVERCOME THE ADVISOR / AGENT DIGITAL ADOPTION CHALLENGE, AS SHARED AT HEARSAY SUMMIT:

1. SET EXPECTATIONS WITH SENIOR LEADERSHIP

   Driving field adoption doesn't happen overnight. It's important to set expectations with senior leadership regarding when to expect value (ROI) from social selling. Be sure to educate them and the compliance team about how social media works: posts generate awareness and loyalty; leads and stronger relationships follow; new closed business and increased client retention rates are the final result.

2. START WITH A PILOT GROUP

   Instead of immediately rolling-out your new tool to the entire field, do some testing to fine tune the implementation and the roll-out process itself. The pilot group should be a subset of your final user group, made of two types of people.

   1. **'Early adopters'** – These are the heaviest users of existing sales enablement tools. You can find them by reviewing analytics. They will pick up the tool and tell you all the great and not so great things about it, without much effort on your part.

   2. **'Laggards'** – These people either don't use existing tools or you know they weren't/aren't easy to enable. They help you identify common enablement challenges specific to the new tool and build in coaching around it before you scale beyond the pilot.

One of the biggest challenges marketers run into when starting a digital program is convincing advisors and agents to change their ways. After carefully crafting a strategy and selecting just the right tools to enter the world of social selling – the very tools that make today's advisors and agents wildly successful – marketers are often met with indifference or even resistance. But reps are not resisting just to be difficult; they may be intimidated by something they've never used before and they're definitely already extremely busy!

3. TRAIN THE FIELD

Even with easy-to-use digital marketing tools, field enablement is critical. Training through webinars and sales events is essential and will help the 'early adopters' get up and running.

The most effective form of training, however, is 1-to-1. One client found that scheduling a 1-1 call and sending the email invitation to Hearsay immediately following the call led to the highest sign-up rates. Another client uses standing office hours to drive adoption of the program. In either case, time is spent walking through the Hearsay product step by step, showing advisors/agents how easy it is to subscribe to a campaign and how all the posts get scheduled on the content calendar, explaining how campaigns are designed to attract specific clients, etc.

In addition, it's important to train advisors and agents on more than technology. Help the field start thinking about their personal branding, who to connect with and how to fit social media into their life on a regular basis.

4. PROMOTE NEW CAMPAIGNS

Email works extremely well to drive adoption of new Campaigns. While Hearsay sends email notification for new campaigns, one client suggested their best practice is using an email marketing tool to create drip campaigns. They've found success sending one email a month leading up to the new Campaign, then a second automated email campaign a week after the Campaign comes out. They also suggested targeting the advisors' assistants since they are often the ones who manage social for the advisor.

5. INCENT THE FIELD

Aside from ongoing training, incentives can work wonders to drive adoption. One team shared a program they have around LinkedIn's Sales Navigator. Since Sales Navigator is an expensive tool, Hearsay power users get it free to incent adoption and usage. The team uses LinkedIn's SSI (social selling index) as one of the measures of the wholesaler's social use 'level', as well as Hearsay's User Maturity report which provides a score per user across all social networks. Based on Hearsay's report, if users sustain activity for 4 months, they make it into the next maturity level category and get benefits associated with that level.

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