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How to leverage social to grow your business

Mike Agarwal – Head of East

HOW AND WHERE CLIENTS WILL INTERACT HAS CHANGED



OLD WORLD
Sales-led, offline channels



TODAY'S REALITY
Client-driven, digital and multi-channel

iPhone

Apple reinvented the phone

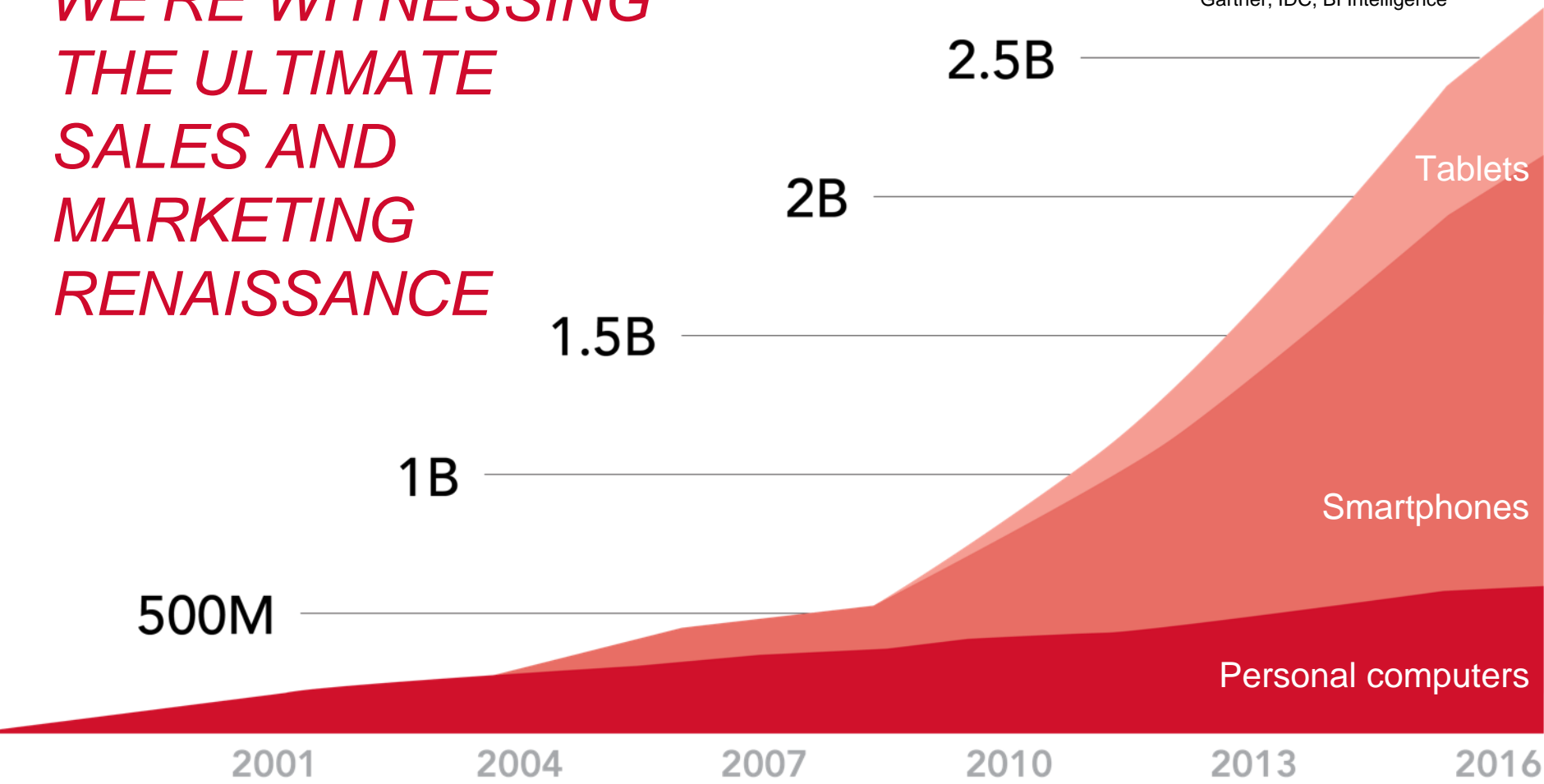


SOCIAL AND MOBILE HAVE CHANGED THE WAY WE EXPERIENCE LIFE.



WE'RE WITNESSING THE ULTIMATE SALES AND MARKETING RENAISSANCE

Source: Internet sales by device,
Gartner, IDC, BI Intelligence



44% consumers prefer texting
for offers than any other channel
- Direct Marketing Assoc., 2015

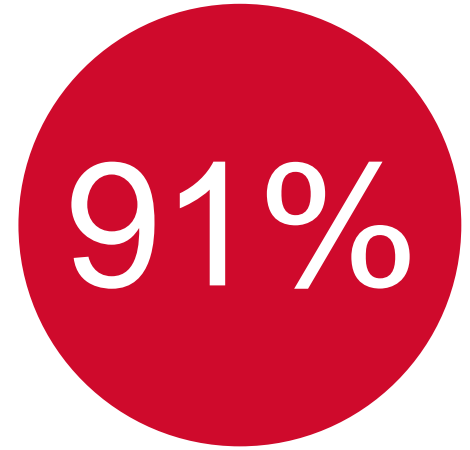
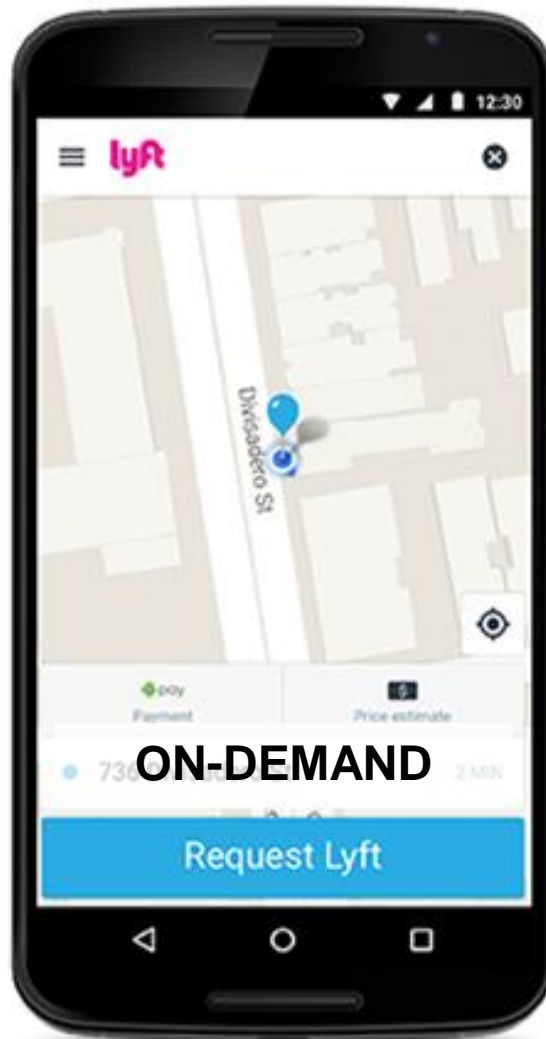
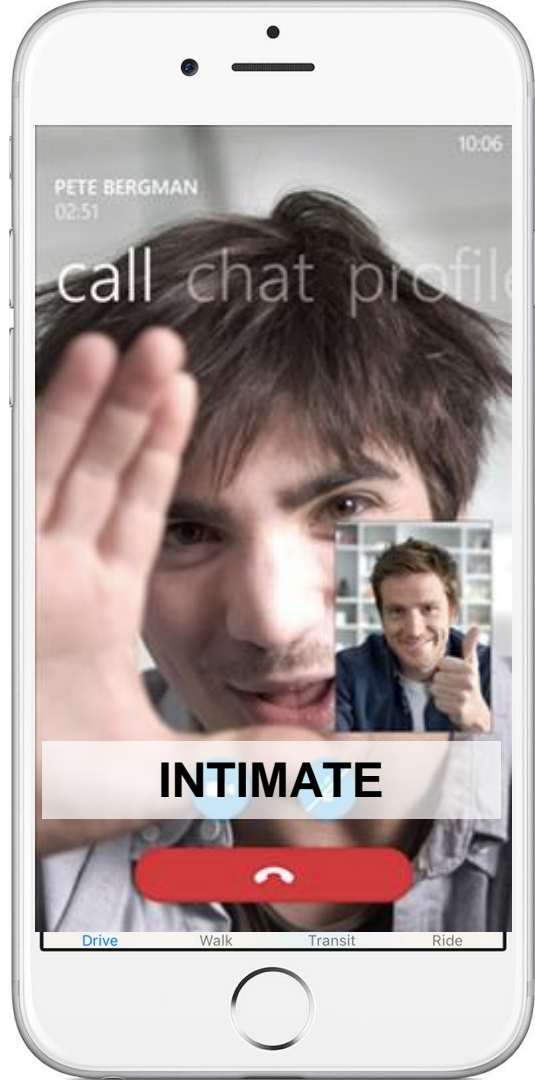
65% digital media time is
on mobile devices
- comScore, 2016

80% using text
for business
- eWeek, 2015

112% close rate when text messaging used

Two-thirds of emails are read
on either smartphones or tablets
-Marketing Land, 2015

90% of Facebook daily active users
access via mobile



**ADULTS KEEP THEIR
SMARTPHONE WITHIN
ARM'S REACH 100% OF
THE TIME**

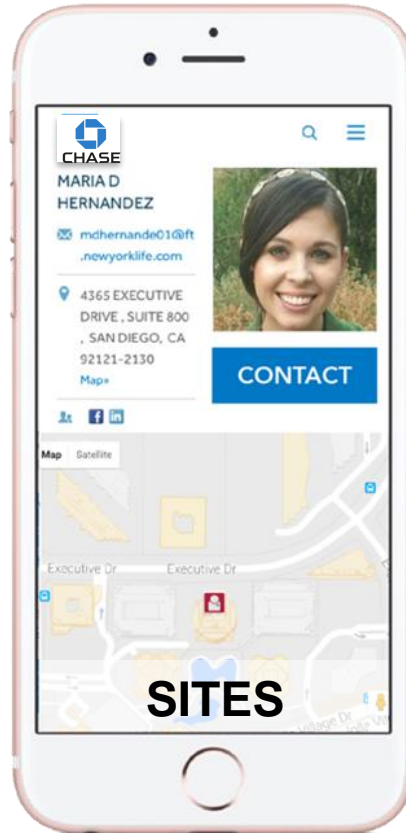
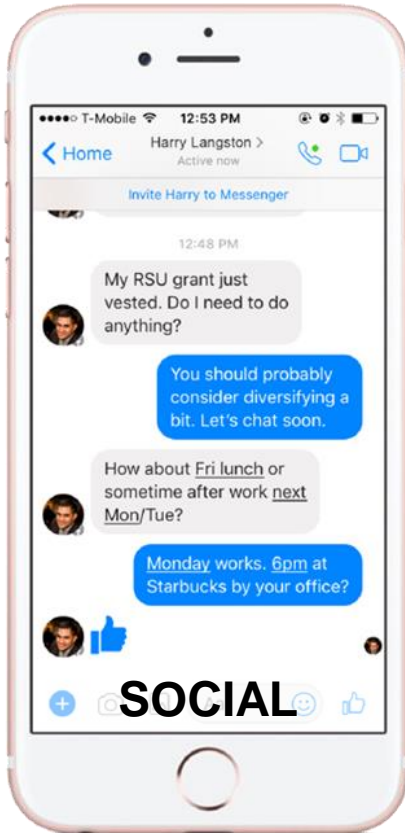
BUT SALES PROFESSIONALS CONTINUE TO MARKET IN 2017 LIKE IT'S 2007



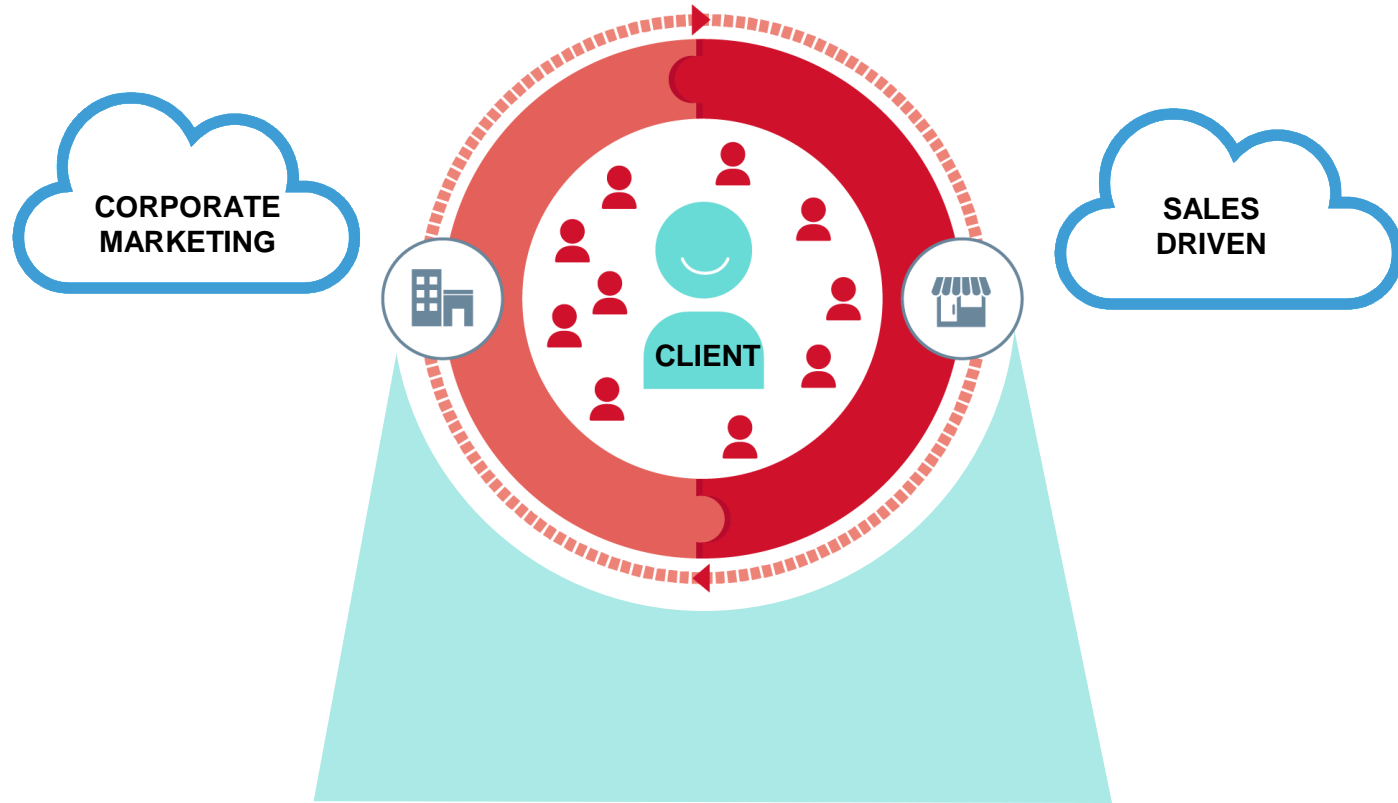
Direct Mail
(\$1/mailing)



CUSTOMERS EXPECT INSTANT + MOBILE



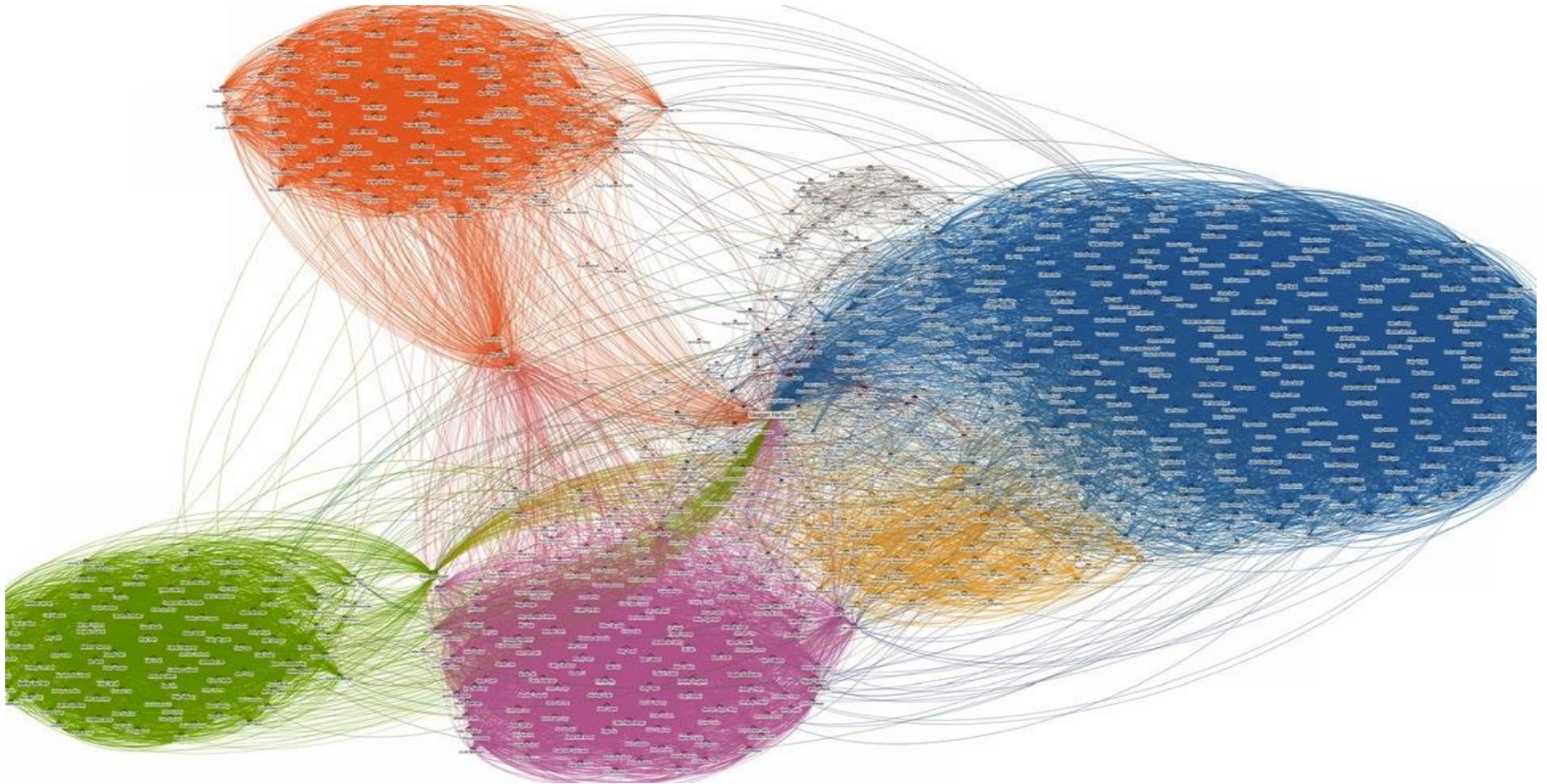
THINK ABOUT THE SALES ORGANIZATION AS AN ENABLER FOR THE CUSTOMER





PLAYBOOK FOR SUCCESS

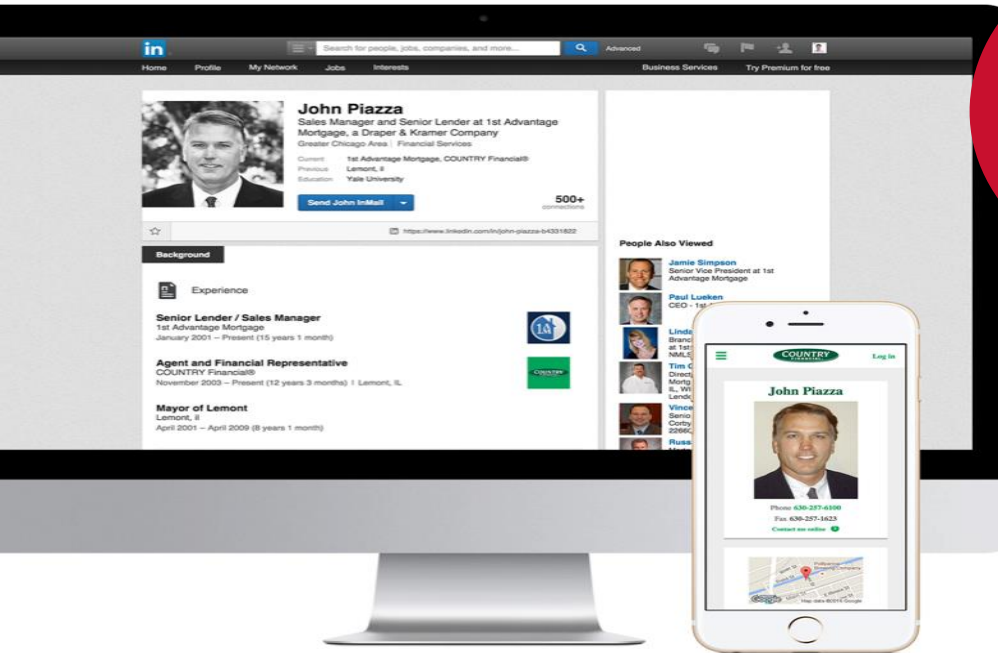
THE VALUE OF THE SOCIAL GRAPH



4 STEPS OF SUCCESS ON DIGITAL



STEP 1: Be findable on search and social



77%

of prospects research
online before they buy

- Findable and consistent presence across social media pages
- Professionally branded, yet personal
- Optimized for mobile
- Dynamic content tailored for your niche audience

*Source: FPA Communication Evolution Report, 2015

SAMPLE LINKEDIN PROFILES



Anthony Truino, CFP®

Financial Services Executive and Senior Financial Plan Management, an Office of MetLife

Greater New York City Area | Financial Services

Current Barnum Wealth Management
Previous Barnum Financial Group, an Office of MetLife
Education Central Connecticut State University

[Connect](#) [View in Sales Navigator](#)

<https://www.linkedin.com/in/anthonytruino>

Background



Summary

At Barnum Wealth Management, our mission is to create holistic plans that preserve and enhance our clients' wealth and simplify the complexities that often accompany financial success.

We strive to be your wealth manager of choice by providing thoughtful collaboration, integrated insightful planning, a superior level of personalized service, and by always putting our clients' interests first.



Experience



JP McDermott

2nd

Financial Planner with MetLife Premier Client Group of the Pacific

San Francisco Bay Area | Financial Services

Current MetLife Premier Client Group of the Pacific
Previous MassMutual San Francisco, Town of Danville, The Growth & Leadership Center
Education St. Mary's College of California

[Connect](#)

[View in Sales Navigator](#)

500+
connections

<https://www.linkedin.com/in/jpmcdermott>

[Contact Info](#)

Background



Summary

What is keeping YOU up at Night?

...Will I run out of money in retirement? ...How can I leave a legacy to my family, while still enjoying what I worked so hard for? ...How will my family be taken care of when I'm gone?

I'm JP McDermott – As a Financial Planner, my passion is taking my clients - families and business owners - through a holistic planning process to develop a financial plan that is sustainable, regardless of life's events, and manages the financial issues that keep them up at night.

Let's talk about what keeps you up at night. Together, we'll develop a plan that you not only feel comfortable with, but sets you on the path to financial freedom.

I look forward to the privilege of working with you!

JP McDermott, MBA, CLTC
Financial Planner

STEP 2: Grow your network—connect



- Connect with those you meet offline
- Think of every business card as a potential connection
- Give people a reason to connect

STEP 3: Deepen relationships by acting on rapport-building moments

The screenshot displays the Hiver social media management dashboard. The top navigation bar includes a user profile for Jane Wilson and tabs for Home, Content, Ads, Sites, Signals, Activity, Contacts, Metrics, and Settings. The left sidebar features an 'Activity Menu' with options for Responses, Feeds, and Published Posts, as well as 'Social Accounts' and 'All Accounts' lists. The main content area shows a LinkedIn feed post by Tim O'Neil, titled 'Activision Blizzard gunning for NFL-scale eSports revenue'. The post includes a photo of a trophy ceremony and a detailed caption about CEO Bobby Kotick's perspective on eSports revenue. Interaction buttons for Like, Comments, and Share are visible at the bottom of the post.

Activity Menu

- Responses
- Feeds**
- Published Posts

Social Accounts

- All Accounts
- Mike Agarwal
- Mike Agarwal- Hearsay Social
- aggiewol

Feeds

Tim O'Neil
LinkedIn Update
3 minutes

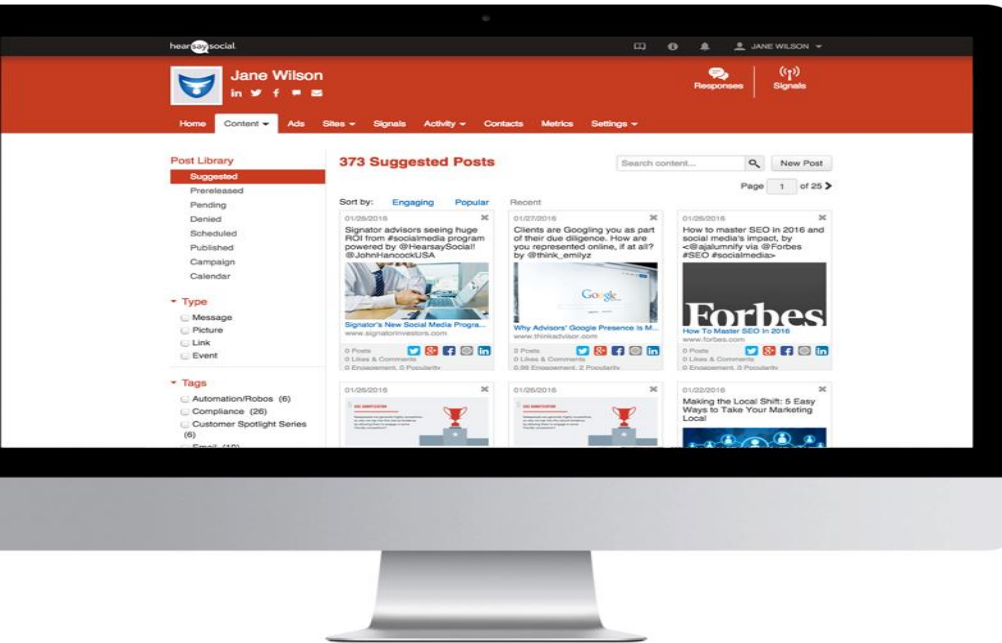
Activision Blizzard gunning for NFL-scale eSports revenue

Activision Blizzard gunning for NFL-scale eSports revenue
CEO Bobby Kotick sees opportunity equivalent to, "the NFL, the Premier League, the NBA, Major League Baseball or NHL"

Like 0 Comments Share 0 Likes

- Pay attention to the meaningful things your clients are sharing
- Share your own personal special moments

STEP 4: Share market expertise



- Share expertise to establish credibility across channels
- Social media and email are strongest channels for client “push” marketing
- Advisor websites, blogs, and seminars are strongest channels for client “pull” marketing
- Home office marketing can play a key role in providing targeted content tailored per client segment or niche

STEP 4: Share market expertise

Information Expected on Social Platforms

If a financial services company were to use social media, what types of information would you expect to receive from it?

	Mass Affluent	Affluent	Ultra Affluent
Market and economic trends and commentary	73%	70%	64%
New product information	62%	58%	57%
Company background	60%	55%	55%
Product performance updates	54%	52%	50%
Best practices, case studies, thought leadership pieces	38%	34%	17%
Moderating a group discussion	21%	14%	7%



Communication Preferences By Age

How would you rate the value of receiving information from your advisor via the following methods? (Shows percentage rated 'somewhat or very valuable')

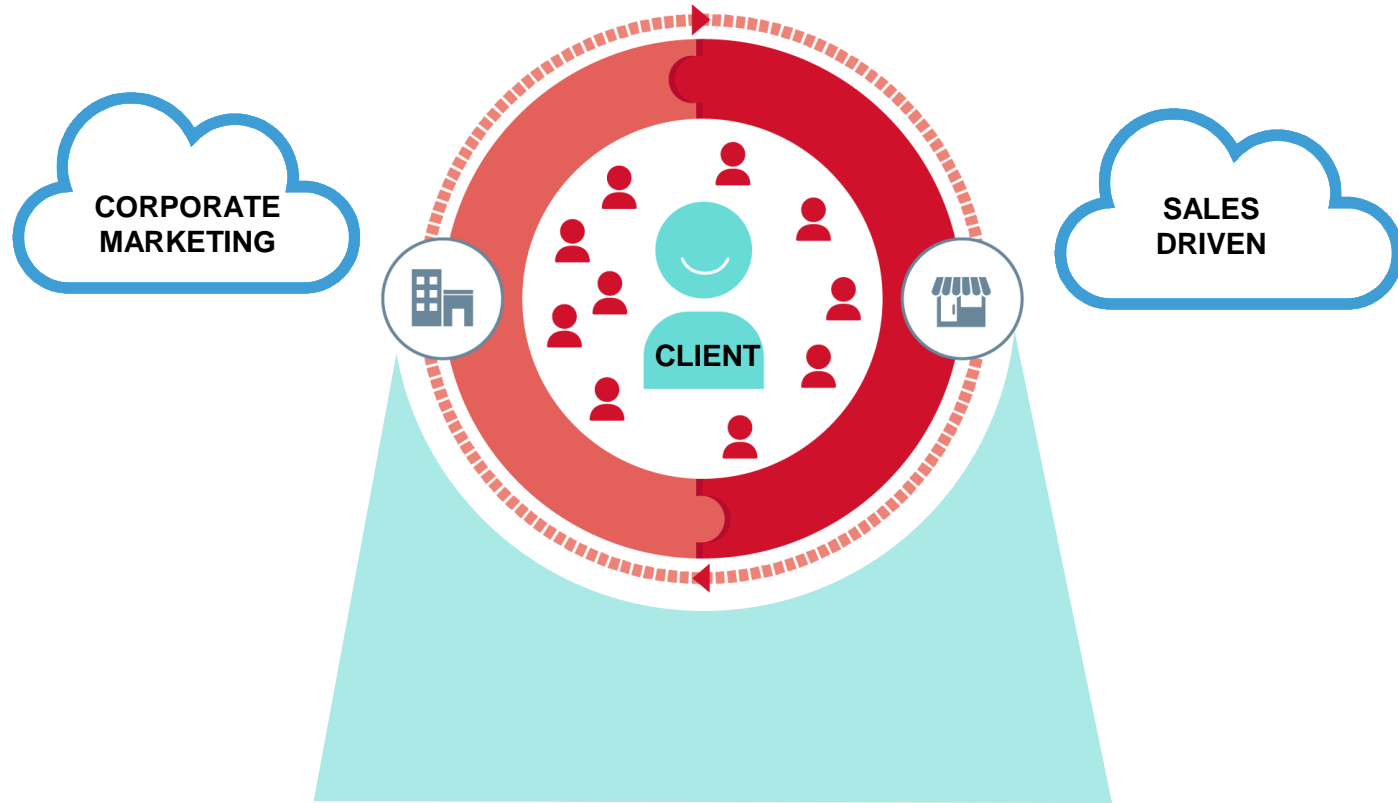
	Client Age			
	Ages 18-44	Ages 45-54	Ages 55-64	Ages 65+
Relevant articles	33%	56%	55%	36%
Advisor blog	23%	44%	16%	13%
Information shared via professional networks (e.g. LinkedIn)	23%	40%	10%	5%
In-person workshops/seminars	54%	56%	48%	43%
Online workshops/seminars	40%	56%	37%	8%



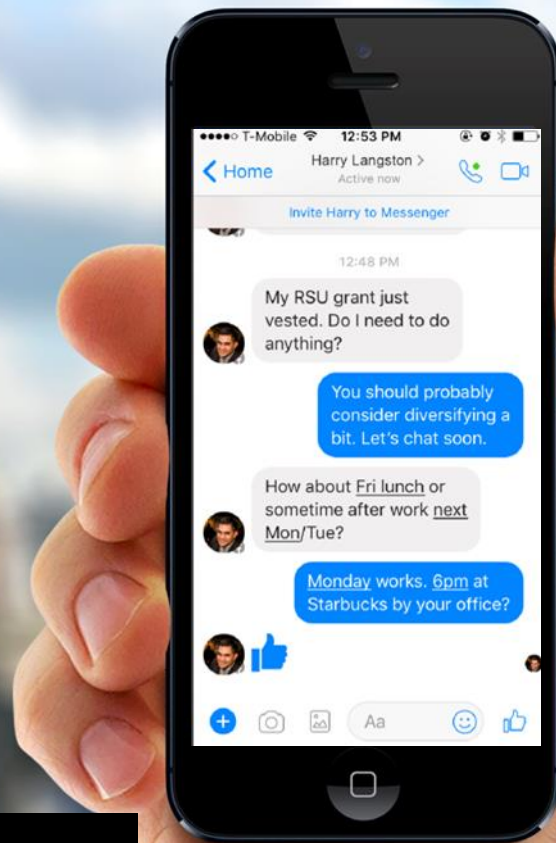
INTEGRATE INTO YOUR PRACTICE

- Connect with people as you would in an offline environment
- Leverage your team to help manage digital channels
- Do research before meetings – LinkedIn is a treasure trove of information
- Share expertise related to *your* area of focus; clients are looking for it
- Reach out and engage with your connections on things that matter to them
- Follow up after meetings and connect with people; use email and other channels
- Ask for referrals; 2nd degree referrals are extremely valuable through LinkedIn

BE AN ADVOCATE FOR SALES ENABLEMENT AT YOUR ORGANIZATION



THANK YOU



Mike Agarwal
contact@hearsaycorp.com