



# People Buy From People

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An Agent's Network is  
Their Best Engine for Growth

# It's a Challenging Time For The Industry



- **Relevancy Loss**
- **Scalability**
- **Face-to-face is now virtual**
- **Organic Reach Declines**

THE CHALLENGE

# COVID Changed Everything



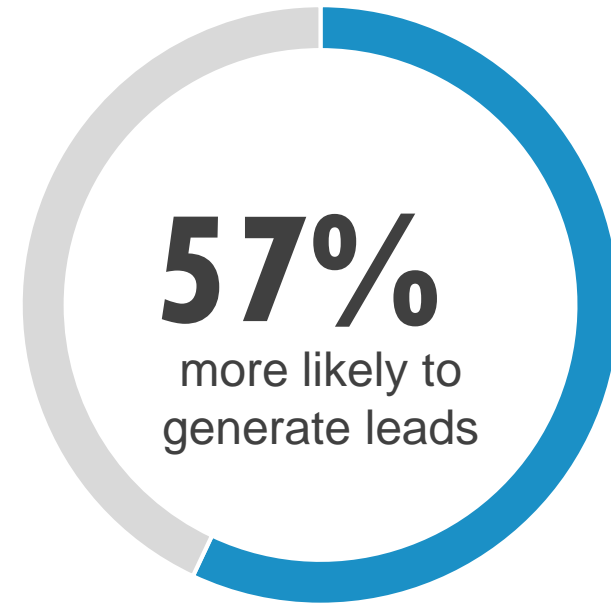
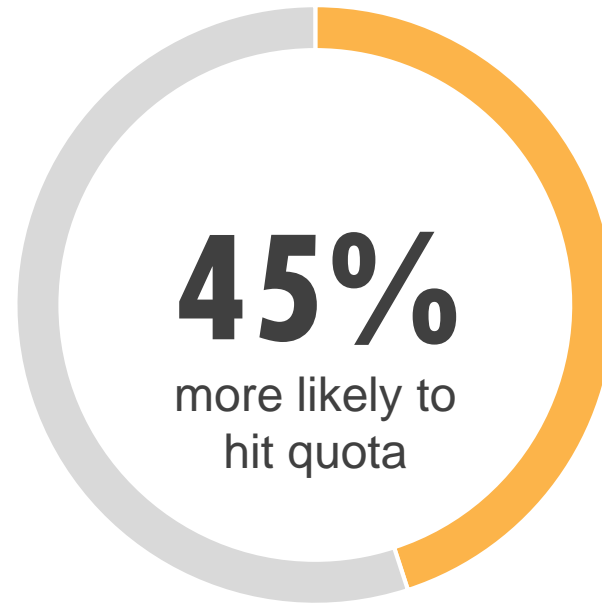
# Social Media Can Make Your Advisors Heroes



THE OPPORTUNITY

# Social Media Drives Results

Sales reps who regularly share content are:



THE OPPORTUNITY

# Drive Reach & Engagement

**Drive reach**  
Employees have  
10x the following  
on LinkedIn than  
their employer



**Improve engagement**  
Employee posts  
return 2x the  
engagement

THE OPPORTUNITY

# Connect Deeply With a More Human Approach

**41%**

of consumers say they don't trust brand marketing communications to be accurate and truthful.

**56%**

of Millennials would swap their current brand for a brand that customizes to them.

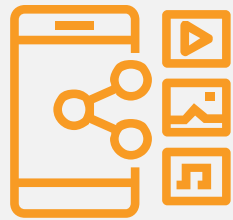
**25pts**

Life insurance customers' net promoter score is higher when they have interacted with their insurer in the last 12 months.



THE OPPORTUNITY

# Social Selling $\neq$ Posting on LinkedIn



**Organic Social  
Content**



**Paid Advertising**



**Custom Post-Click  
Experiences**



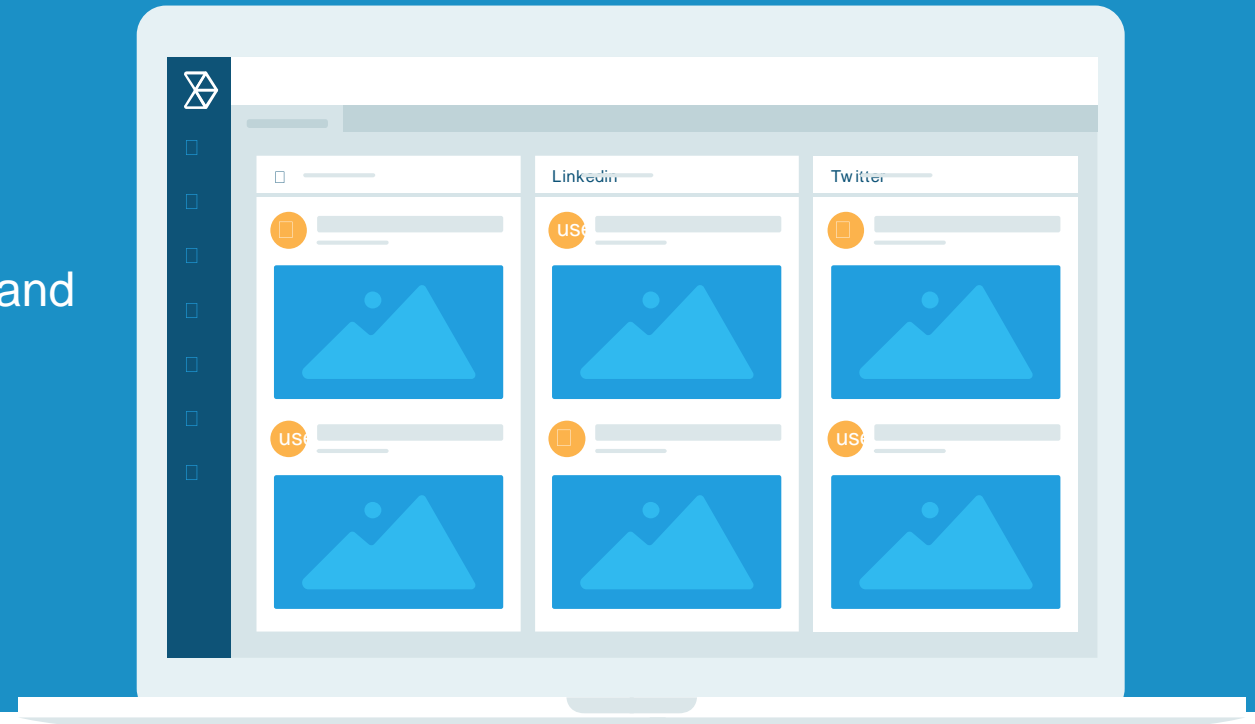
HOW-TO

# Get Your Bank Social Selling



# Modernize Your Team's Toolbox

- ✓ Adopt a Publishing Platform
- ✓ Say Goodbye to Manual Monitoring and Engagement
- ✓ Retire Your Archiving Binders

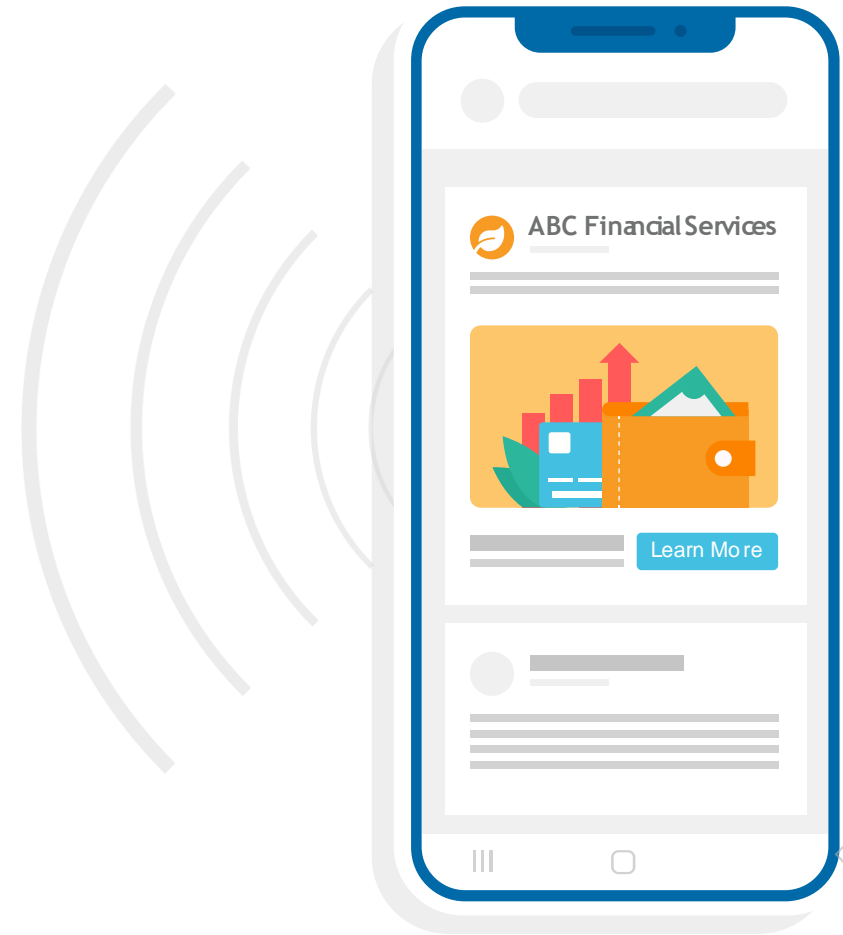


PAID SOCIAL MEDIA ADVERTISING

# Amplify Your Reach

## **Paid Social Media Advertising Helps Your Brand:**

- Reach more customers and prospective customers
- Activate proximity-base marketing
- Engage prospects at the right moments



PAID SOCIAL MEDIA ADVERTISING

# Amplify Your Reach

**The right tools can:**

- Make paid campaigns manageable at scale
- Drive better results

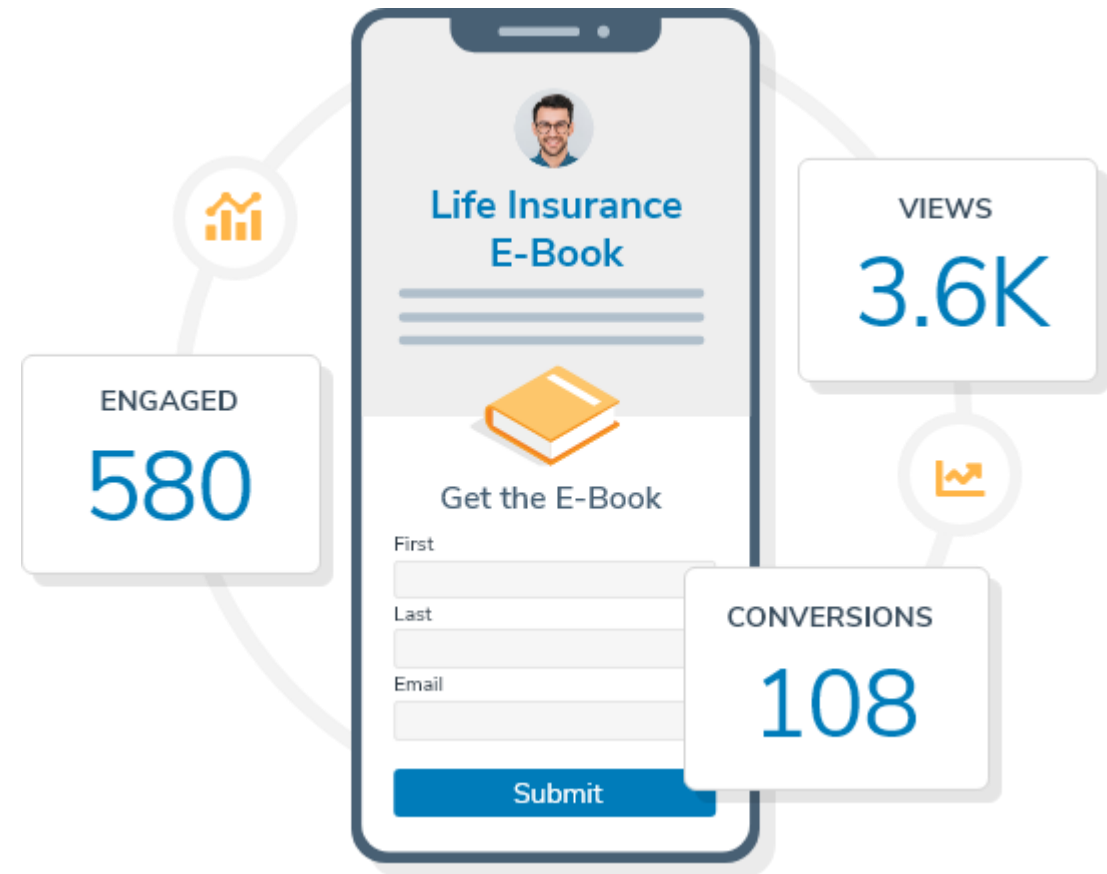


POST CLICK

# Digital Experiences That Convert

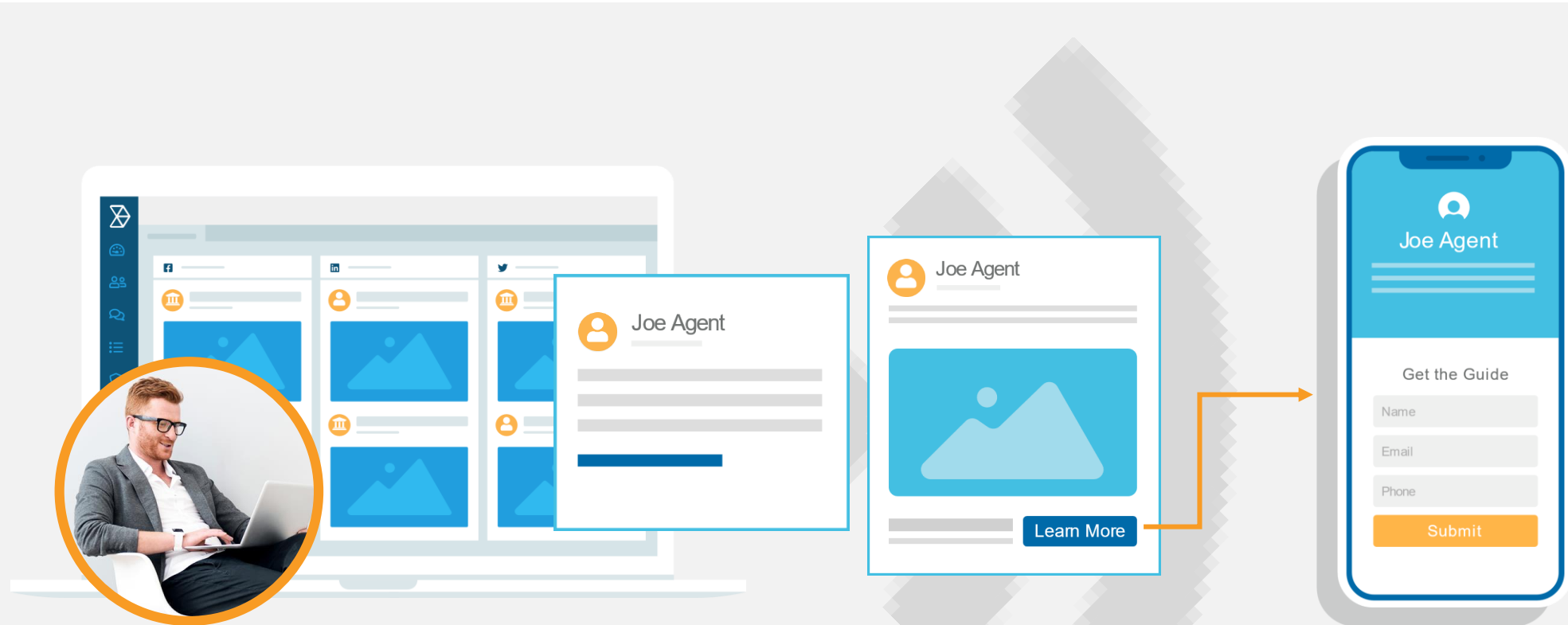
## Go Beyond Vanity Metrics

- Create personalized experiences
- Gather valuable sales information



THE SOLUTION

# What it Looks Like



## THE CHALLENGE

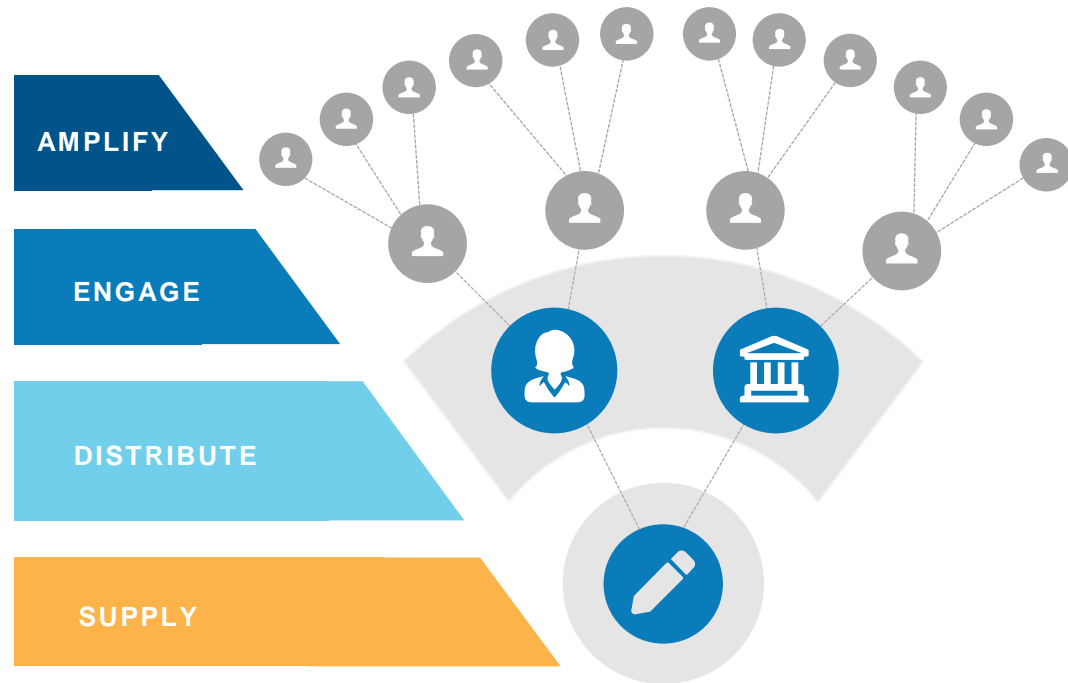
# Igniting the Power of Social Media is Hard

- ✓ **Workflow Management**  
Creating and publishing content at scale is challenging
- ✓ **Complexity**  
Managing owned and paid social media is time-consuming and complex
- ✓ **Strategy & Content**  
Advisors know they need to get involved, but they don't know where to start



THE SOLUTION

# The Only Fully-Compliant Social Selling Platform for Financial Services



Create...  
Manage...  
Publish...  
Advertise...

Social content via  
one consolidated  
console





## OUR SOLUTION

# Staying Compliant



### Governance & Risk Management

- Approvals and workflow
- Access controls
- Keyword filtering



### Archiving

- Secondary backup of all posts



### Brand Mention Alerts

- Scouring the web for brand mentions
- Compliantly reply to customer issues



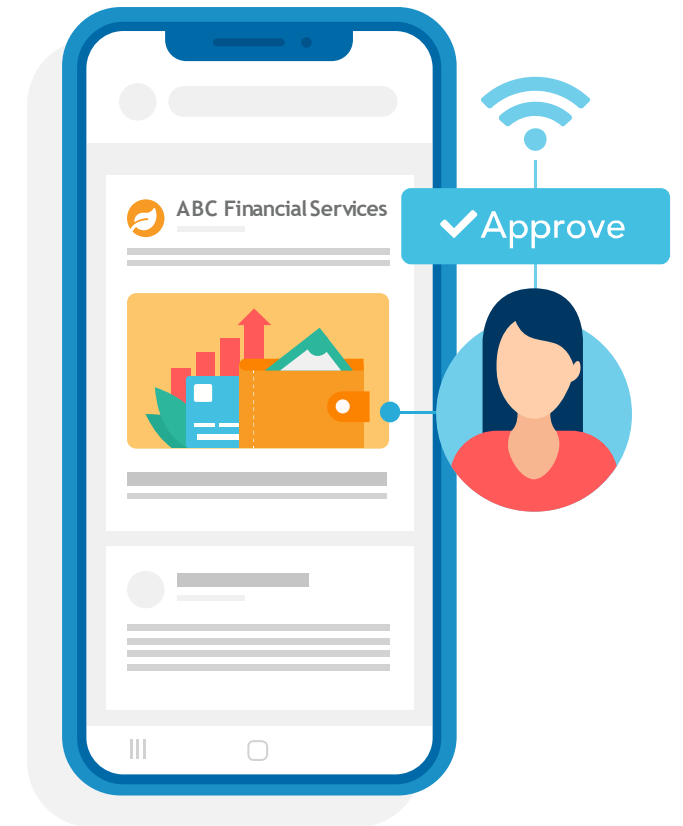
**FDIC**



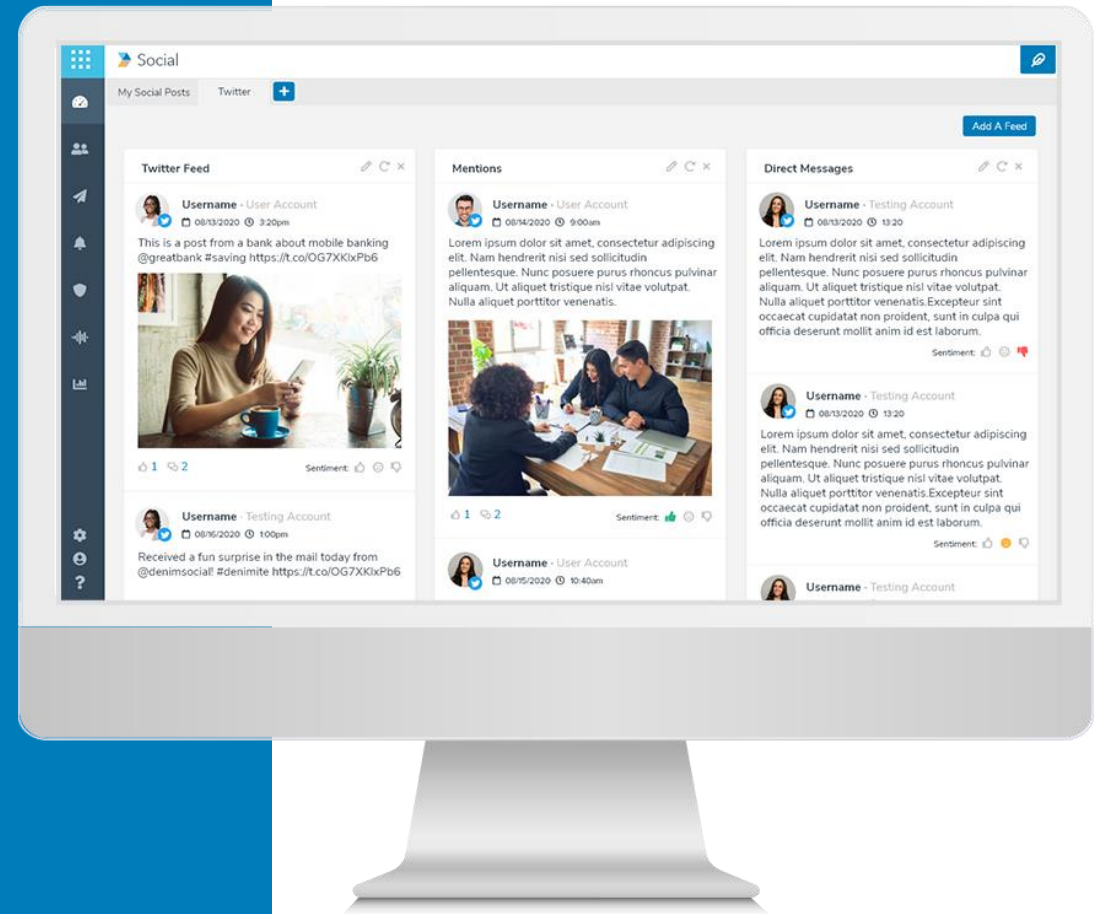
**FINRA**



**FFIEC**



You can spend less and engage more deeply with relationship-driven marketing on social media





# Want to Learn More?

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