

## Formulating a Social Web Strategy & Policy for Your Agency

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ACT Webinar Presented By:

Cindy Adams, Holmes Murphy  
Katie Herbst, Westfield Insurance  
Angelyn Treutel, Treutel Insurance Agency  
Rick Morgan, Consultant & Chair ACT Social Web  
Work Group  
Jeff Yates, ACT Executive Director



## Jeff Yates

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Executive Director  
Agents Council for Technology, IIABA

Jeff.yates@iiaba.net  
linkedin.com/jeffyatesACT



## Rick Morgan

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Linkedin.rickmorganconsulting  
Facebook/rickmorganconsulting  
Twitter.com/rickjmiv  
rick@rickmorganconsulting.com



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## The Social Web and The Independent Agent

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- Opening Up New Opportunities
- Risks
  - Privacy
  - E&O
  - Security
  - Proprietary Information

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## Creating a Social Web Policy Guide

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- Company culture and management philosophy
  - Avoid the social web altogether
  - Act intelligently
- Transparency
- Company vs. personal brand
- There is no one size fits all

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## Katie Herbst, CIC, CISR

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Web Marketing  
Westfield Insurance

[Linkedin.com/in/katieherbst](https://www.linkedin.com/in/katieherbst)  
[Twitter.com/katieherbst](https://twitter.com/katieherbst)  
[katieherbst@westfieldgrp.com](mailto:katieherbst@westfieldgrp.com)



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## Westfield: Getting Buy-in

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- Follow corporate objectives
- Educate senior leadership
- Get the right people involved in the discussions up front
- Set a policy



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## Westfield: Creating a Policy

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- Get the right people in the room
- Discuss risks and roadblocks
  - Employee behavior/HR response
  - Legal implications
  - Customer interaction/response
  - Security concerns
  - Reputation management
- Stay in touch with this group

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## Angelyn Treutel, CPA

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Agent  
Treutel Insurance

[Linkedin.com/in/angelyntreutel](https://www.linkedin.com/in/angelyntreutel)

[Facebook/treutel-insurance](https://www.facebook.com/treutel-insurance)

[Twitter.com/atreutel](https://twitter.com/atreutel)

[angelyn@treutel.com](mailto:angelyn@treutel.com)



## Agency Policy

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- Frank discussion with staff
- Encourage use of social media
- Staff web presence is an extension of the agency-Code of Conduct
- The Internet is forever
- Privacy and Confidentiality
- Productivity Impact and Monitoring
- Disciplinary Action for Abuse



## Tie Your Internet Marketing Together

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- Main website: include news & events (monthly)
- Blog: add stories, use keywords (weekly)
- Twitter: use to communicate updates
- Facebook Pages: use to share tips and allow questions
- LinkedIn: professional network to keep up with reading, topics, trips, and networking
- Email: use for newsletters
- Chat and text messaging: be everywhere (livechime.com)

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## Cindy Adams, CPA, CPCU

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Vice President Information Technology  
Holmes Murphy

[Linkedin.com/in/csaadams](https://www.linkedin.com/in/csaadams)  
[cadams@holmesmurphy.com](mailto:cadams@holmesmurphy.com)



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## Strategy Points

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- Educate yourself and others within the agency
- Work together with various stakeholders on goals
- Establish a general road map
- Create Policy
- Find internal advocates
- Try it and talk about it
- Have simple measures to show success

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## Agency Policy

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- What did we do right?
  - Educated upper management and got their buy in
  - Used a team to create
  - Asked questions of others and leveraged what they were doing
  - Compromised on risks and roadblocks
  - Tried to keep concise and short
  
- What we didn't do right?
  - Needed more education to all employees on social media terms before policy posted

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## ACT & Industry Resources

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- ❑ [www.iiaba.net/act](http://www.iiaba.net/act) at the “Websites & Social Media” quick link
- ❑ “Creating a Social Web Policy for your Independent Agency”
- ❑ Sample Agency Policies
- ❑ Tour of Website & Guide



## Upcoming ACT Social Web Webinars

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- ❑ The Social Web and the Independent Insurance Agent “Opening up new opportunities”
- ❑ First things first - building a team, crafting a plan and best practices for engaging in Social Media
- ❑ From Apps to Tweets – How to get started
- ❑ Social Media Today and Measuring Return on Investment
- ❑ E&O Issues to Manage When Using Social Media

