
Focus Groups Findings and Discussion





ABOUT RICOCHET

Ricochet is a consulting firm that helps associations transform their business. We bring modern strategies, technologies and skills to your organization.

Ricochet is staffed by seasoned consultants, all of whom have worked at associations and understand the complex industry cultures and practices. We develop realistic strategic recommendations and often continue to assist through implementation.

Ricochet has deep expertise in technology, marketing strategy, and membership initiatives.



ABOUT CHRIS GLOEDE

Chris Gloede is the Chief Consultant for Ricochet where he leads the consulting practice. He is frequently the project leader for Ricochet client work and guides Ricochet's research white paper initiatives.

Chris was the first Chief Marketing Officer of the American Bar Association where he led the organization's membership and marketing turnaround by introducing annual strategic planning, adding analytic capabilities, building a new marketing technology infrastructure, and implementing marketing automation.

Chris is also the lead instructor for the popular Association Digital Marketing Certificate Course. He previously led digital marketing at advertising agencies Ogilvy & Mather and Leo Burnett.

A hand holding a blue pen is positioned over a document. The document features a bar chart with blue and red bars, a line graph with red lines, and a circular logo. The word "Process" is overlaid in white text. The background is dark with bokeh light effects.

Process

Objective

We wish to better understand the value of existing member marketing support resources and collect insights that can help improve those resources. The marketing resources explored explicitly excluded lead referrals available to Advantage Subscribers, and specifically included:

- TC Logo Use
- Customized Ads
- Content to Share
- Training Series
- Digital Reviews
- Reimbursement Program



Five Focus Groups

Chris Gloede from Ricochet facilitated the sessions while Trusted Choice representatives anonymously monitored.

Trusted Choice representatives were able to message the facilitator throughout the session and were consulted for additional questions before closing each session.



Group sessions explored three areas



Agency Marketing Landscape

Understanding the general marketing organization, needs, and tools used by agencies. We asked questions like:

- Who does the marketing for your agency?
- What other marketing/competing resources do you use outside of TC?



Trusted Choice Value

Understanding how the Trusted Choice brand and benefits deliver value to agencies. We asked questions like:

- How do you use Trusted Choice marketing collateral?
- Which parts of Trusted Choice are most valuable to your agency's success?



Trusted Choice Opportunities

Understanding new and unmet needs of agencies that Trusted Choice can uniquely solve. We asked questions like:

- How can TC better help your agency?
- How can we increase awareness and use of TC resources?

A group of diverse people are seated around a large conference table in a meeting room. A woman in a dark blazer stands at the front of the room, pointing towards a whiteboard. The room is dimly lit, and the scene is overlaid with a semi-transparent dark layer and a bokeh effect of colorful light spots. The word "Participants" is centered in white text.

Participants

Participants

Trusted Choice recruited participants from the quantitative survey that indicated they welcomed an invitation, those that used resources and other samples of members to share more information through a Focus Group.

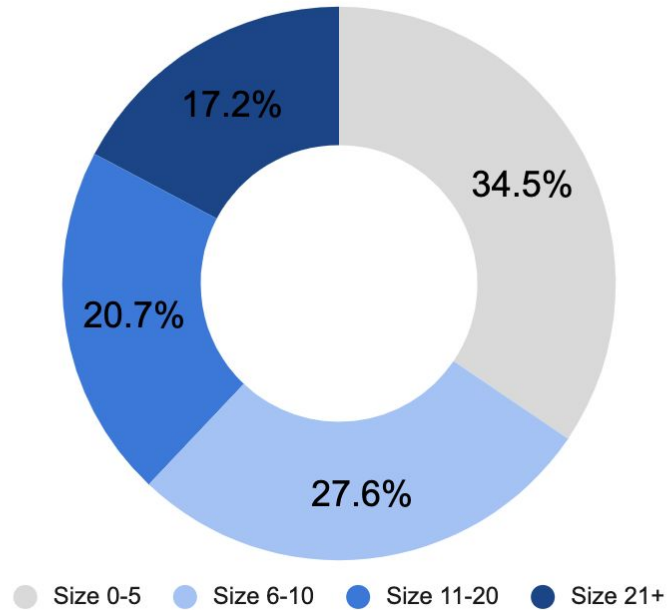
Focus Group sessions were not organized by segments though we did track participant geography and agency size. Participants discussed their marketing needs, organization, technologies and tools, and experiences with Trusted Choice marketing resources.

A total of 29 participants joined in the five group sessions. Groups sizes ranged from three to nine participants. Agency sizes ranged from 1 to 108. All four U.S. census regions were represented.

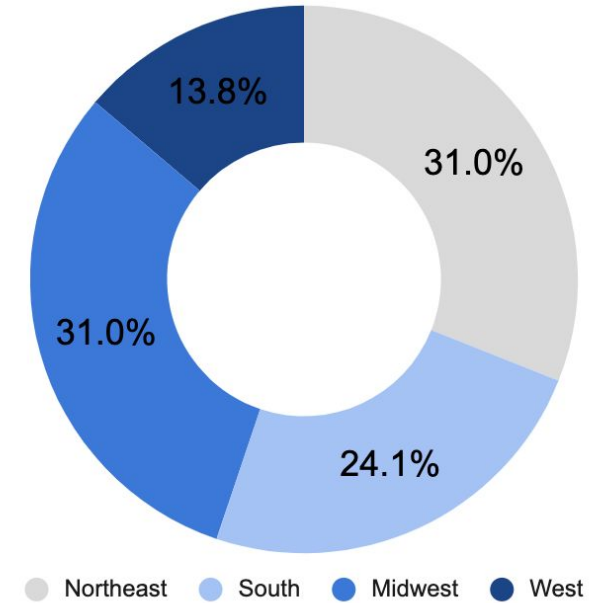


29 Total Participants

Participants by Agency Staff Size



Participants by Region





A person is shown from the chest down, wearing a blue button-down shirt, writing on a white document with a gold pen. The scene is dimly lit, with a laptop on the left and a smartphone on the right. The background is filled with a bokeh effect of colorful lights. The word "Findings" is centered in white text.

Findings



Marketing is rarely an agency focus or core skill.

Agencies tend to be sales-driven and marketing is commonly not an area with significant staff, time, technology, or financial resources.

With limited marketing support, agencies struggle to satisfactorily manage increasingly complex and specialized marketing demands including web development, collateral design, social content creation, third party review management, sponsorship and partnership negotiation, and online media buying.



"I have no set [social marketing] strategy or formula...I guess "winging it" would be the [strategy]."

Kirk Engle, Owner
KS, Size: 2



[It's] usually me who has to post on Facebook and I do a lot of other things so that's usually not the most important thing on my to-do list.

Shasta Nieland
IA, Size: 6



We decided we need to hire a [outside] marketing person...we're not doing a very good job of it internally.

Jeff Schlitt, VP
FL, Size: 21



[We use] a marketing subcontractor...probably have her for 10 to 15 hours a week at this point.

Anthony Vlachos, President
NY, Size 4



Some agencies use marketing for awareness and others focus on leads.

Agencies have differing levels of marketing maturity, with only approximately half documenting a marketing strategy or objectives. When agencies can articulate their marketing objectives, they typically are related to sales leads or general awareness.

Agencies do not have the advanced skills or tools to calculate marketing attribution for sales or the means to measure their awareness impact, leaving marketing success in the eye of the beholder.



Of course, you have objectives. You're marketing to increase your sales and to gather additional leads.

Alan Kape, President
NJ, Size: 4



[We use marketing for] driving awareness and traffic.

Ryan Keating, VP, Commercial
CT, Size: 3



"I have no set [social marketing] strategy or formula...I guess "winging it" would be the [strategy]."

Shelly Dahler, Advertising and Marketing
IA, Size: 6



My objective, because we're in six different states, is just to have like people go to our website and see us on social media.

Jordan Piland, Producer
GA, Size 6



Agencies generally don't have full time marketers and they welcome assistance.

Agencies use many marketing staffing models but most participants do not devote a full-time person to marketing duties. Marketers have many responsibilities and little time to determine how Trusted Choice can help them. Most participants would welcome some type of Trusted Choice training, such as one-on-one assistance, live webinars, or on-demand videos.



I would like something that I could review in my time. I love the idea of...maybe a six part series.

Erin Haughton, Marketing Manager
IL, Size: 5



I think having the video [training] series saved and available to people would be great.

Jeff Schlitt, VP
FL, Size: 21



If the [benefits explanation] email was focused on one like one particular benefit not mixed in with industry news or...a newsletter [it would be better].

Dustin Kowaleski, Agent
NE, Size: 20



Maybe even an intro email ...for a new agent...with the option to call and set up a [Trusted Choice] meeting.

Jordan Piland, Producer
GA, Size 6



Other companies supply marketing resources similar to Trusted Choice resources.

Providers share free, professionally-produced marketing collateral and social content to agencies. Some carriers in particular “push” their social content through emails, which is preferred for some agents to quickly grab rather than proactively logging in and searching for the content.



[One carrier] emails me just a couple of pieces [of content] every week...not all insurance related, some of it's just timely content...I tend to share more of their content because it comes right to my email.

Shelly Dahler, Advertising and Marketing
IA, Size: 6



I did a couple of Zoom classes with different carriers...and it was very helpful for me to learn what [marketing resources] they offered.

Jeff Schlitt, VP
FL, Size: 21



My marketing is basically handled by a virtual receptionist. We just pointed her to a number of carriers...to be able to pull content and just share it out to social media and the websites.

Shawn Juris, Principal Agency
OH, Size: 2



Some of [the marketing collateral] we write ourselves, we use some of our carrier's resources, and we have used some Trusted Choice resources in the past.

Kirk Engle, Owner
KS, Size: 2



Regional and customizable content is preferred, or required, for most agencies.

Agencies find some value in the general content, but feel it isn't always relevant. Regional content that includes relevant topics (e.g. hurricanes along East Coast, wildfires in West Coast) is more helpful. State-specific content reflecting local laws is also welcome.



Having everything automated; we did do that for a time and what I found was a lot of the same contents getting posted and engagement dropped.

Shelly Dahler, Advertising and Marketing IA, Size: 6



There has to be a way for agencies... to take that content and somehow make it unique enough for us that we can still use. The way that the [Trusted Choice] content is right now, our metrics show that sharing it is like not even posting it at all [and it results in no engagement].

Rachael Rizzi, VP, Sales & Marketing NV, Size: 11



It would be embarrassing for us if we're sharing content on wheat as a crop insurance item when there's no wheat grown in Iowa.

Doug Follmann, EVP IA, Size: 51



I'm okay with some of the general text content, but there needs to be more variety in the [Trusted Choice] imagery that we share.

Jana Foster, Owner NV, Size 7





Video is an increasingly important collateral element.

Participants often discussed increased use of original video for social content, proposals, and general marketing. The majority of participants are expanding the use of video in all types of communications and aren't limiting video to just marketing collateral.



[I] would like to see some involvement on how Trusted Choice could help create videos.

Laurie DeWall, Claims Assistant
IA, Size: 10



I like it when I don't have to create all my video content. We will do it and we're currently doing a life insurance series, but it's really nice to have a content library that actually includes video.

Shelly Dahler, Advertising and Marketing
IA, Size: 6



We're also doing the video blogs, which we've noticed are really easy to do with our equipment and makes [marketing] more personal.

Cara Garrison Executive Assistance
NJ, Size: 14



Video has the more personal touch in times like these, with the pandemic...I feel like video is kind of the next best thing.

Jess Fleury, Personal Lines Asst Mgr
VT, Size 37



Implications

Trusted Choice should help develop agency marketing skills.

Agencies manage increasingly complex marketing and marketing technology duties with no formal training or education. Agencies hire specialized outside parties to help execute discrete tasks such as creating blogs or ads, but few agencies have a marketing strategy.

Agents have a hard time sourcing resources for marketing training and strategic planning. Trusted Choice can provide training and resources to develop general agency marketing skills.



Trusted Choice should offer sales enablement content and resources.

Agencies are highly concerned with trackable sales and have developed objectives, staff, operations, and analytics to develop, monitor, and convert leads through sales methods.

Trusted Choice can deliver low-effort, high-impact value by expanding content outside of traditional marketing and into sales enablement tools such as call scripts, personal LinkedIn profile best practices, and competitor battlecards.



Trusted Choice should develop proactive benefit onboarding.

Agencies universally possessed only a partial understanding of the Trusted Choice benefits. But those that had proactively scheduled time with Trusted Choice staff better comprehended the services and expressed positive Trusted Choice opinions.

Trusted Choice should leverage its talented marketing staff to deliver scalable, periodic benefit overviews, through quarterly webinars for example.



Trusted Choice should deliver versioned and customizable content.

Agencies and consumers can immediately spot corporate-developed social content that is too generic, over-produced, and out-of-touch for their market.

Agencies need content that is pushed to them (rather than requiring their proactive login and search), that has regional relevancy, that allows for easy text editing, and includes multiple image options for local relevancy.



Trusted Choice should create more customizable video.

Agencies are quickly growing their video production capabilities and using more video content for ads and social posts. Trusted Choice content offerings should include more video assets along with online tools that allow agencies to immediately customize clips rather than request a customization to be delivered later.





Open Discussion

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