

Technology / Social Media / Mobile

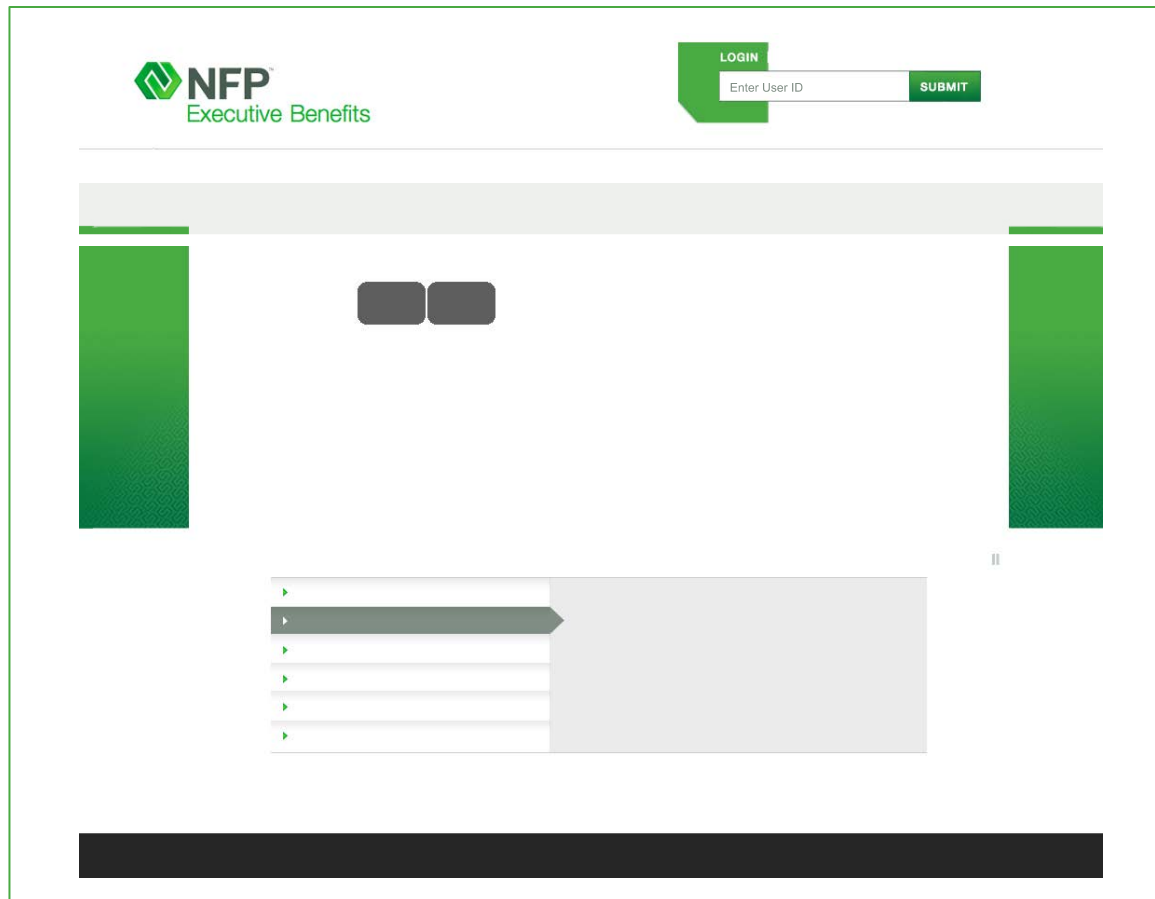
Innovate, Integrate, Connect



Presented By:
Jonathan Duda
Todd Lewis
Eric Martin

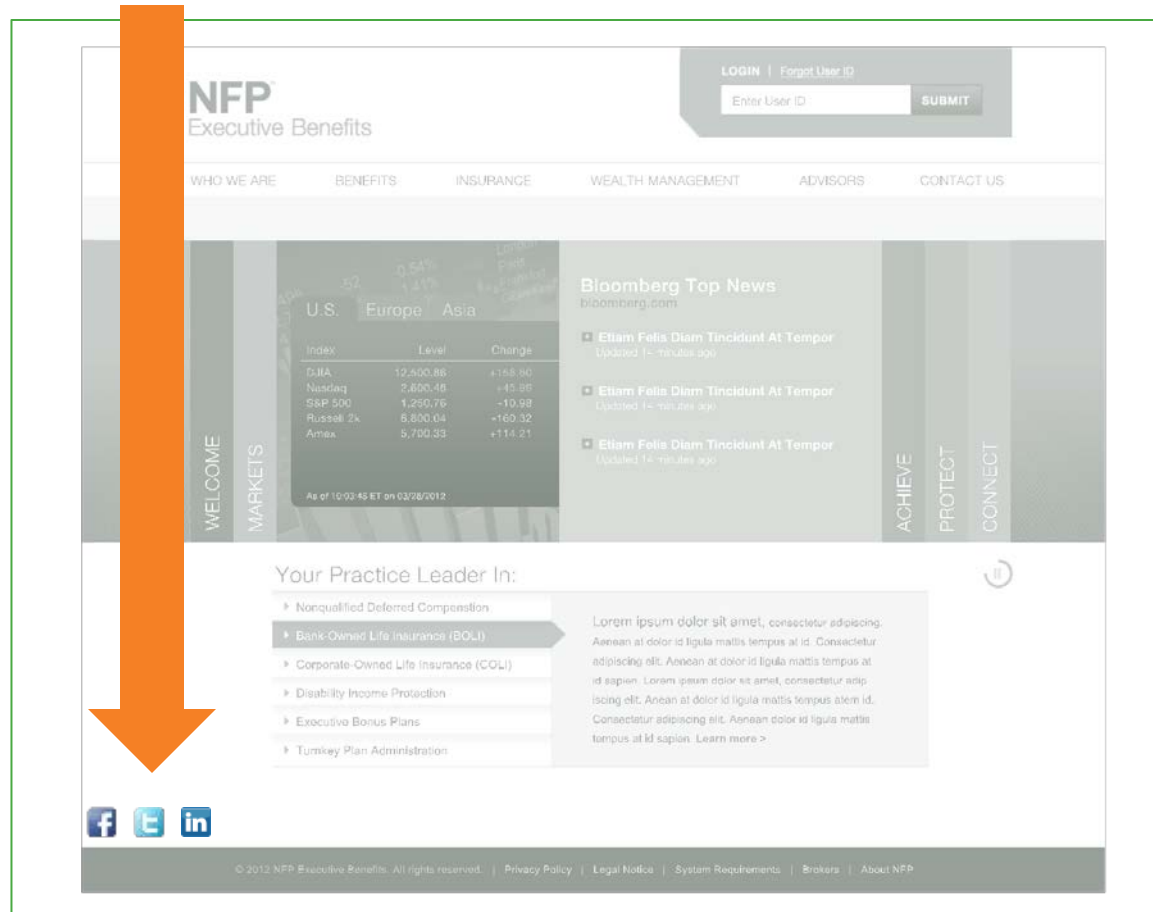
Technology Integration Happening Now

Starts with a website upgrade ...



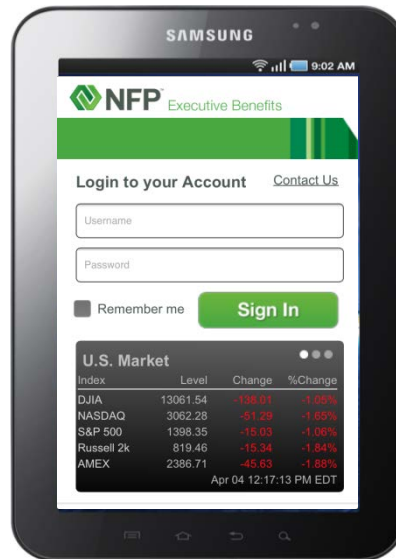
Public Dialogue

... then introduces Social Media



Tools You Need & Want

... and develops Apps



All You Need is an iPad

Apps integrate with
Salesforce.com



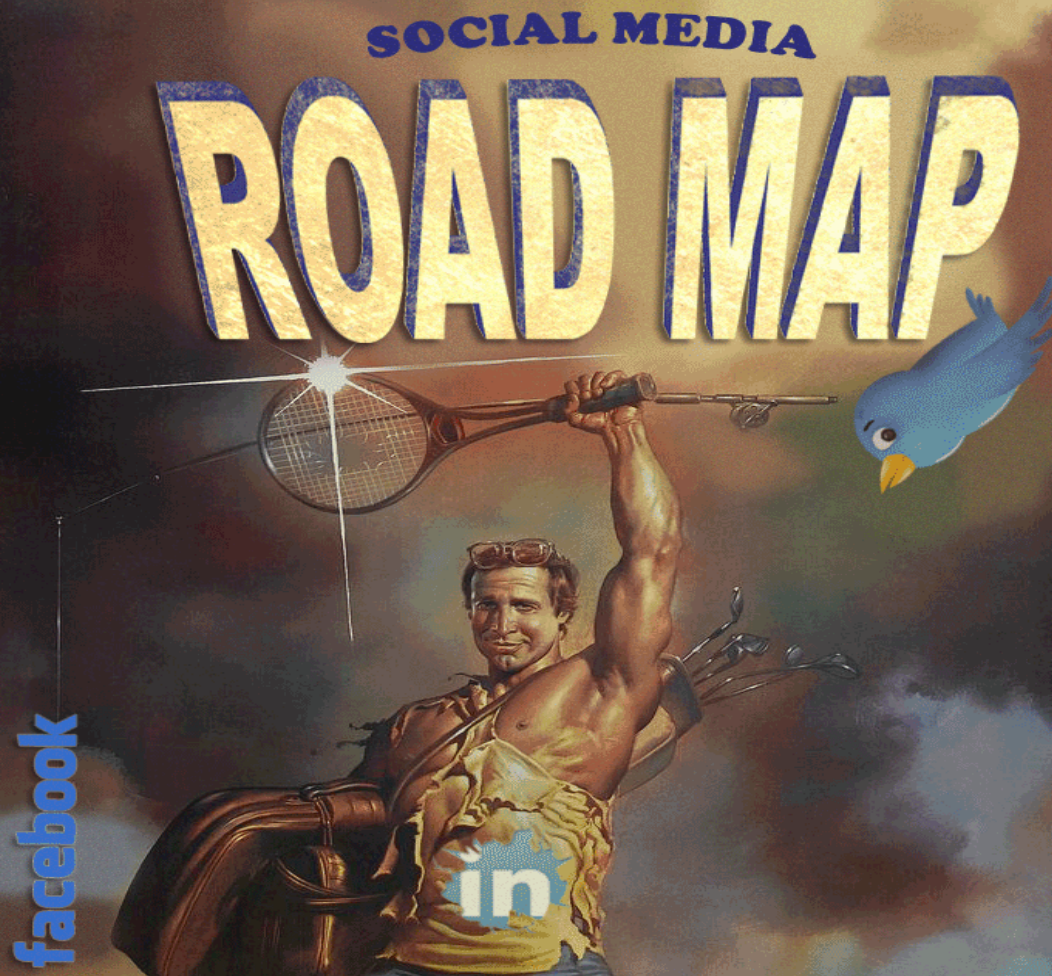
Social Media



Presented By:
Todd Lewis

Roadmap to Social Media

**Three steps to planning your social media road map.
(Unlike Clark Griswold)**



Why Social Media?



1. To interact with clients.
2. To interact with prospects.
3. To influence the influencers.
4. To gain market presence.
5. To become a resource.
6. To give the business a personality.
7. To be part of the conversation.

Before Social Media...

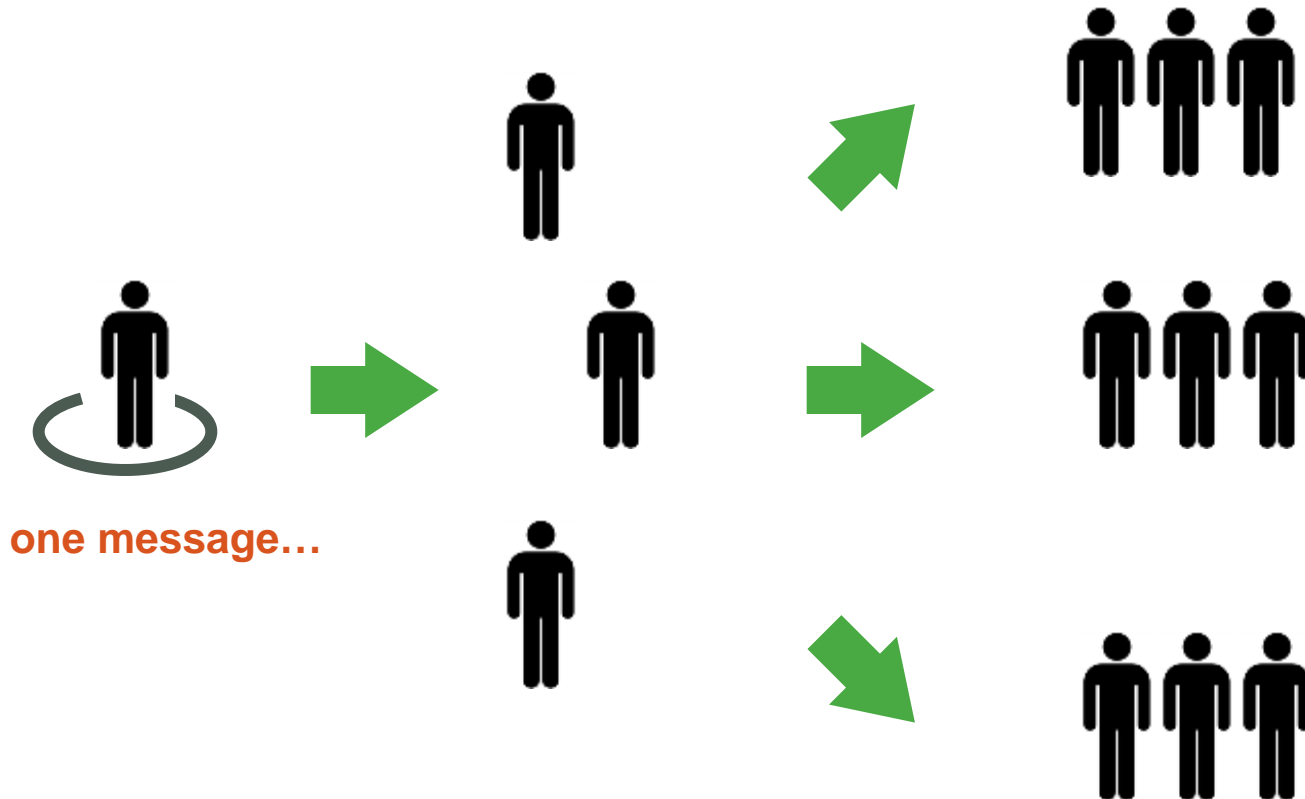


Image inspiration: Social Media for Business by Presentation Advisors November 2010

With Social Media...

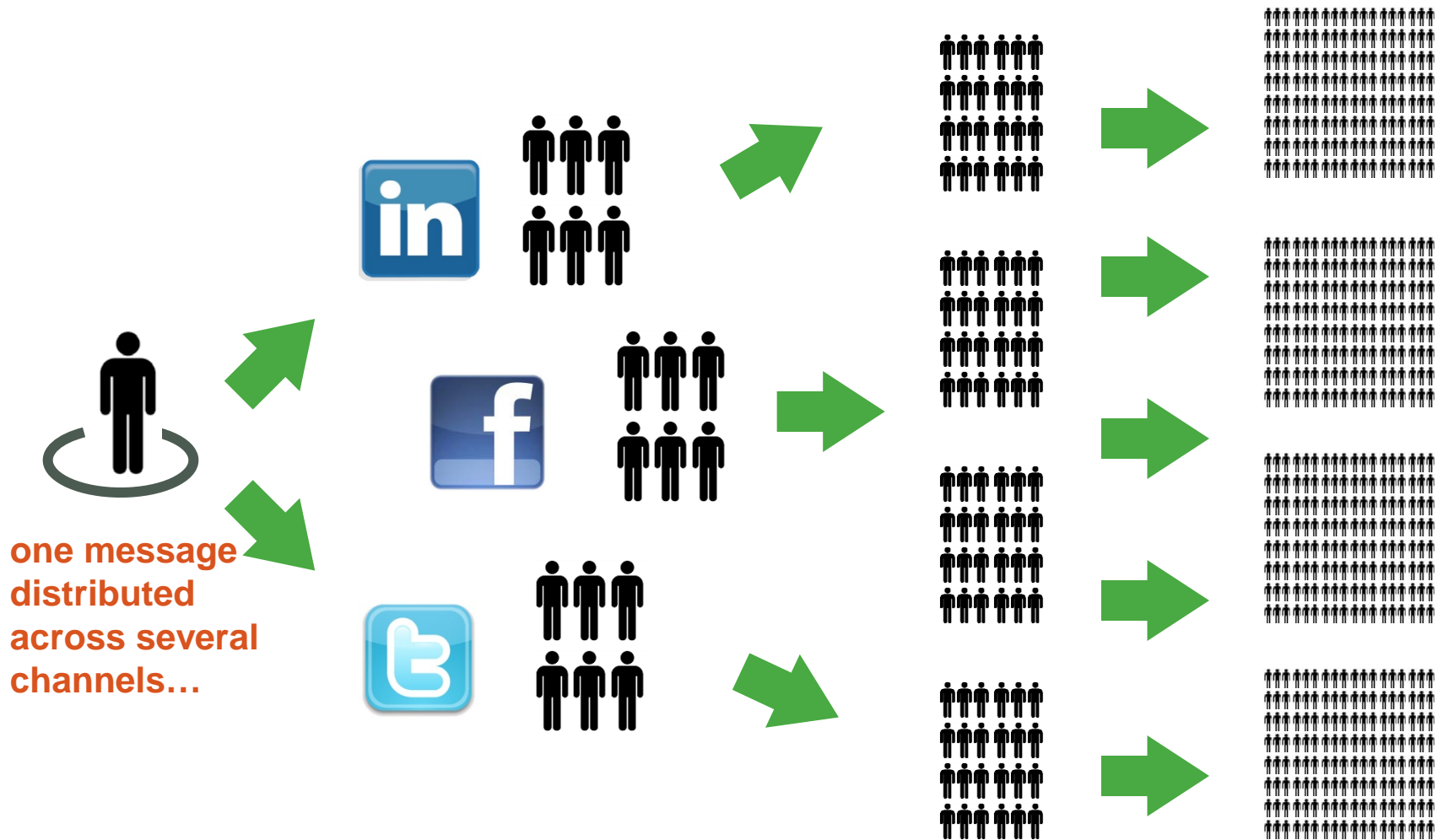
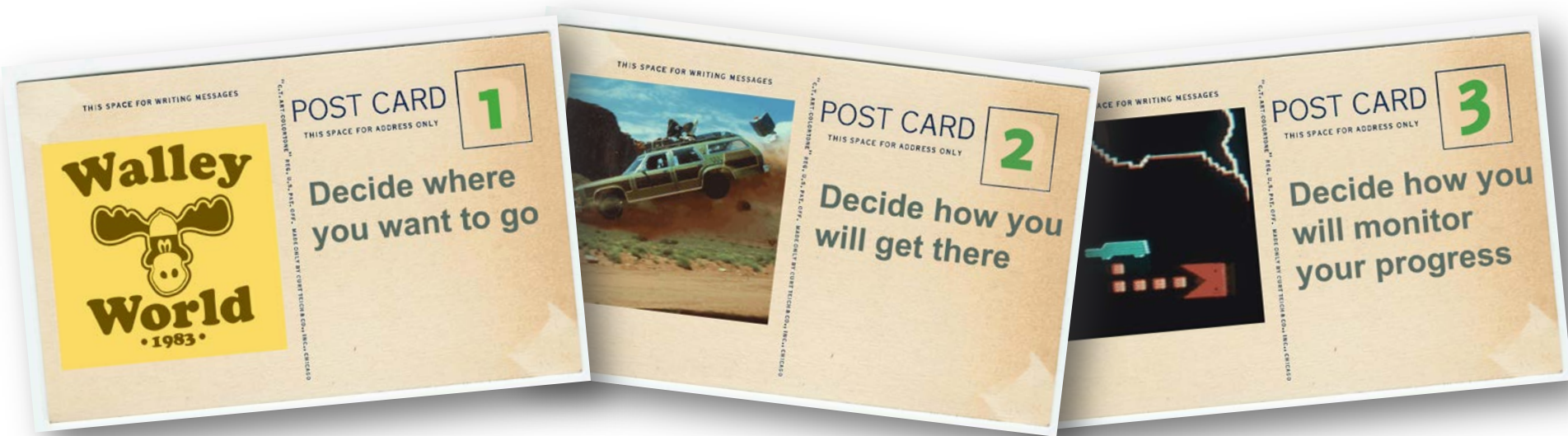
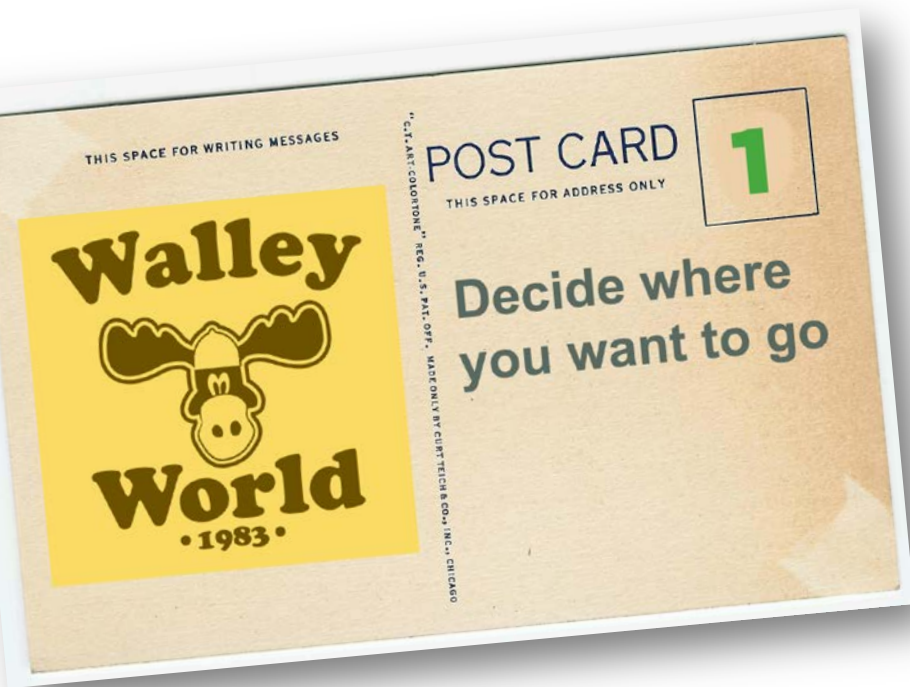


Image inspiration: Social Media for Business by Presentation Advisors November 2010

3 Steps in Creating Your Road Map



Step One – Decide Where You Want to Go



- Evaluate where you are
- Evaluate where you want to go
- Evaluate what the goals are along the way

Evaluate Where You Are

How do I get **involved**? Where should I **start**?



Evaluate Where You Are



Clarify the audience's **wants, needs** and **challenges**.

Evaluate Where You Want to Go



Define the guiding **theme** of your strategy.

SALES

AWARENESS

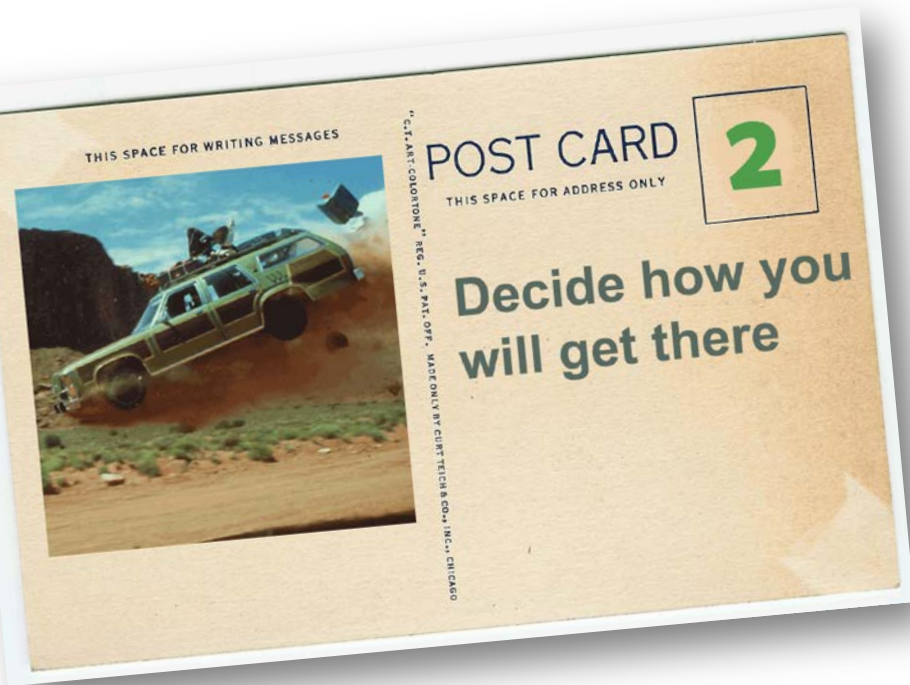
LOYALTY

Evaluate the Goals Along the Way

Make sure you are on track and following your **goals** and **objectives**.



Step Two – Decide How to Get There



- Choose a vehicle to get you there
- Establish a social media policy
- Get a map to set strategies and goals

Choose a Vehicle to Get You There

Identify which **platform** best suits you and your **customers**



facebook

Linked in

twitter

Social Media Demographics



- 33% of users are between the age of 35-44
- 59% are female and 41% are male
- 37% of users have an income of \$ 50,000 - \$99,999



- 46% of users are between the age of 35-44 and
- 57% are female and 43% are male
- 47% of users have an income of \$50,000 - \$99,999

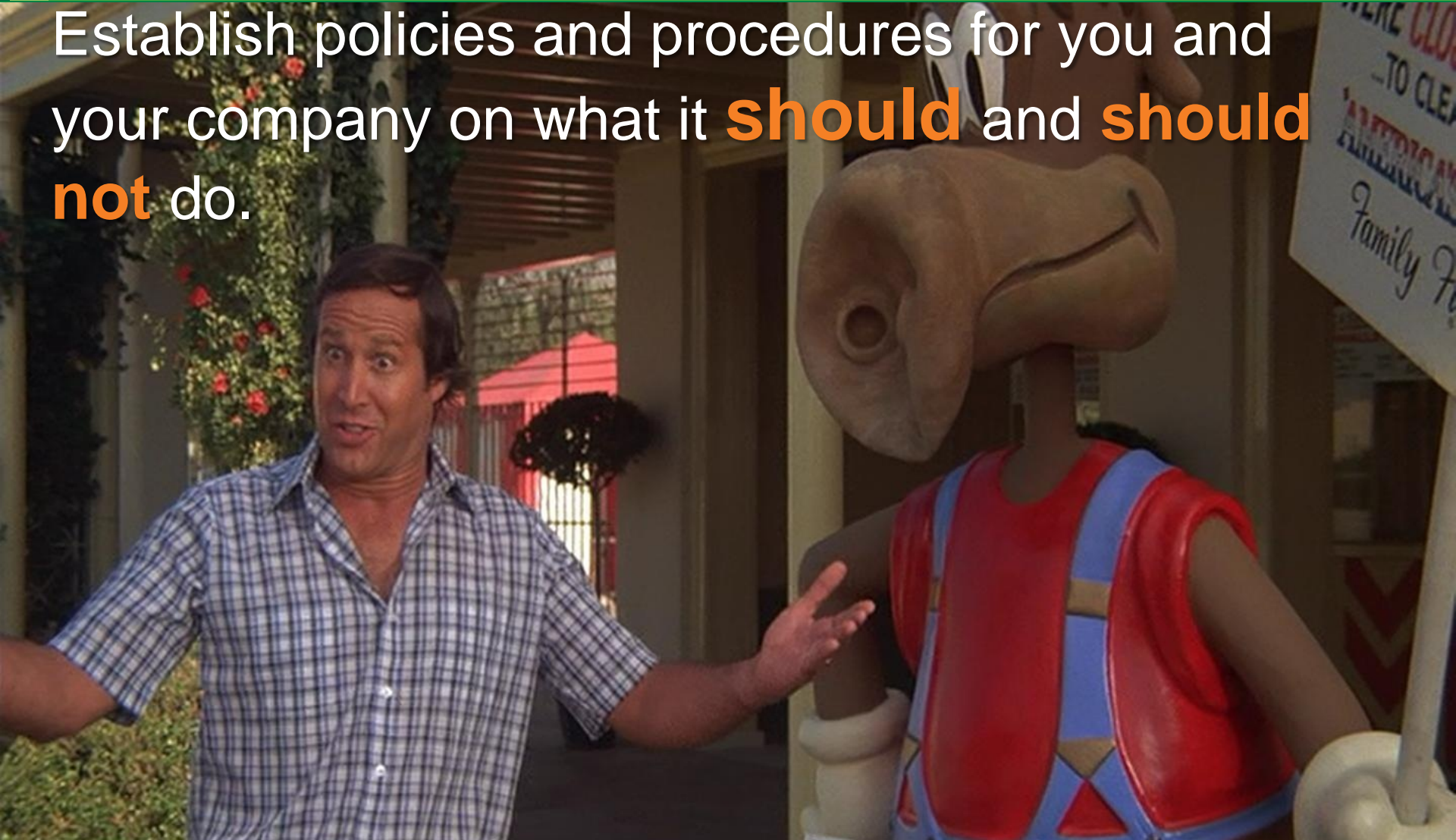


- 49% of users are between the age of 35-44
- 50% are female and 50% are male
- 50% of users have an income of \$50,000 - \$99,999

Source: <http://www.onlinemba.com/blog/social-media-demographics/>

Establish a Social Media Policy

Establish policies and procedures for you and your company on what it **should** and **should not** do.



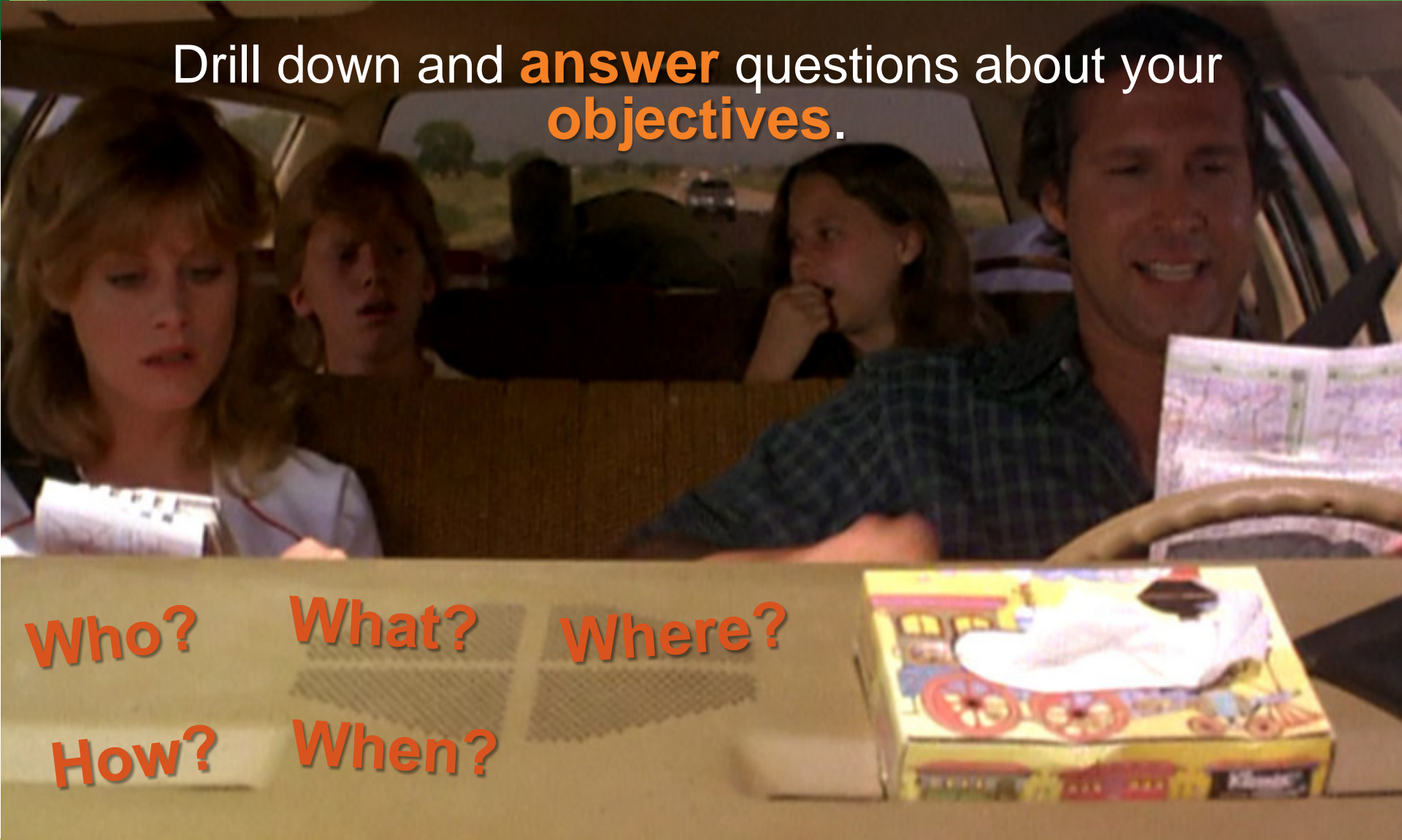
Establish a Social Media Policy

Your **reputation** is on the **line**.



Get a Map to Set Strategies and Goals

Drill down and **answer** questions about your **objectives**.



Step Three – Decide How You Will Monitor Progress



- Evaluate your progress
- Track your fan base
- Find social media monitoring sites

Evaluate and Track Your Progress

Evaluate your **progress** and **fine-tune** the details.



Use Social Media Monitoring Sites

FREE



Recap



1. Decide where you want to go
2. Decide how you will get there
3. Decide how you will monitor your progress

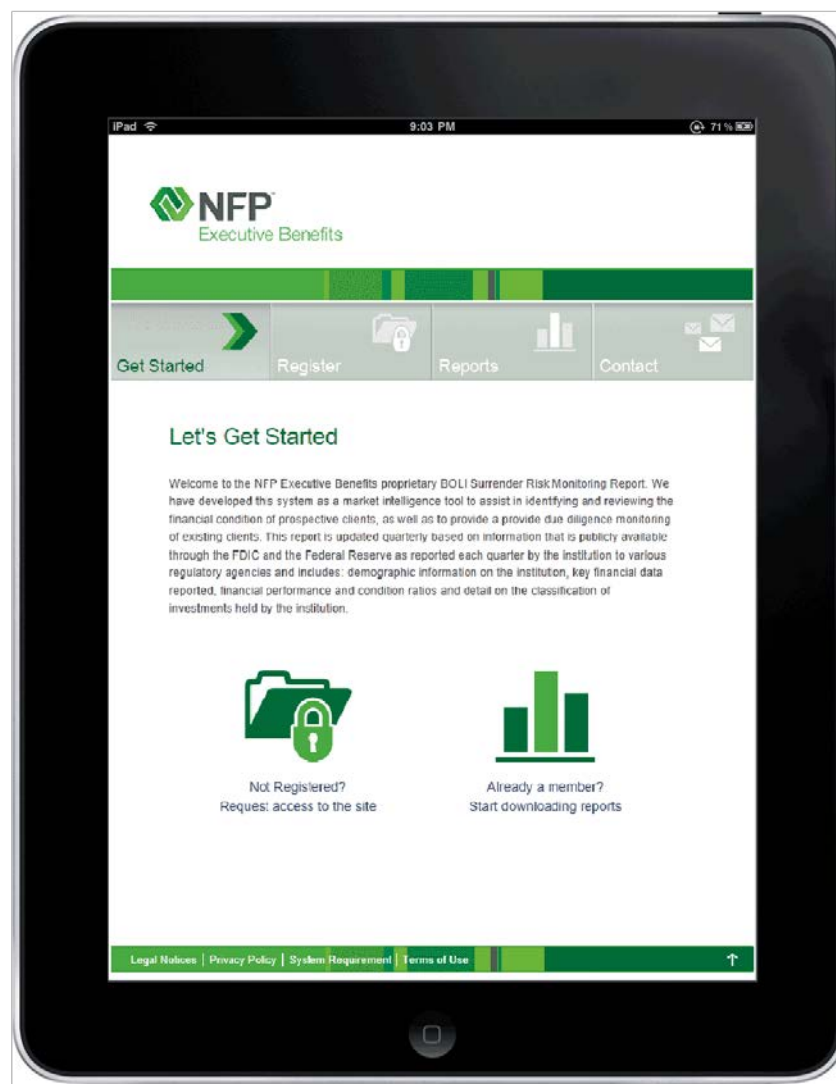


Mobile Apps

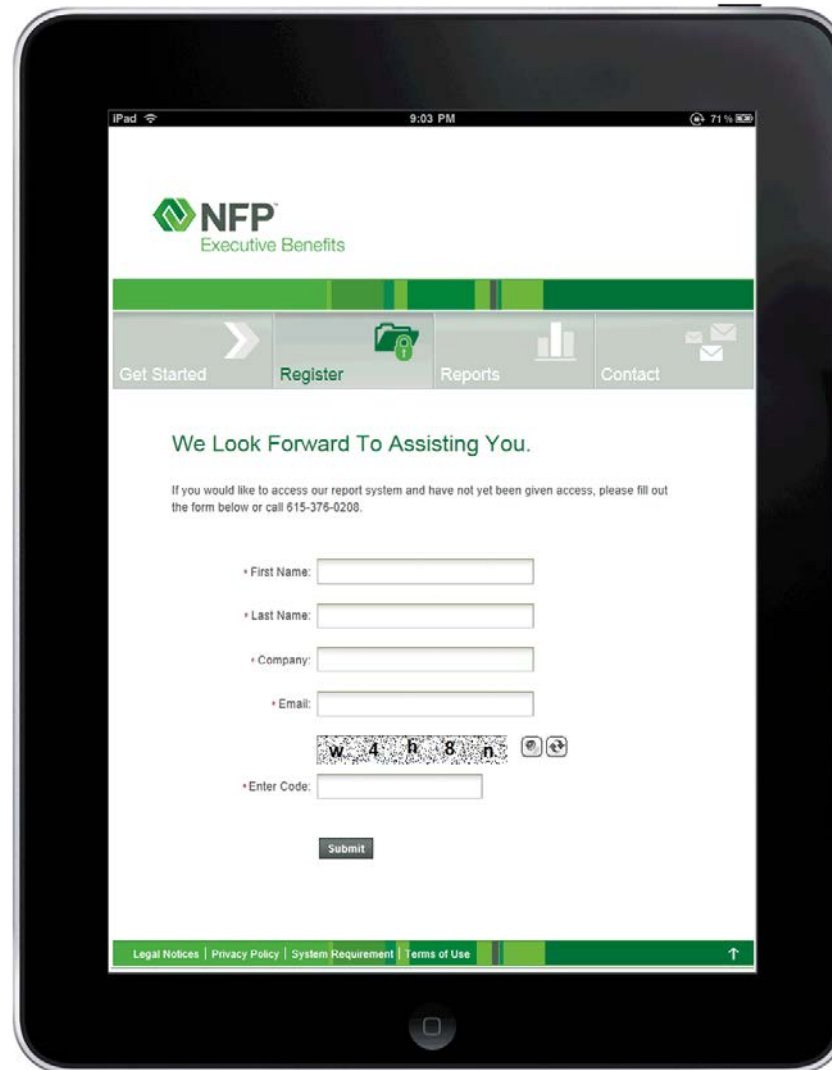


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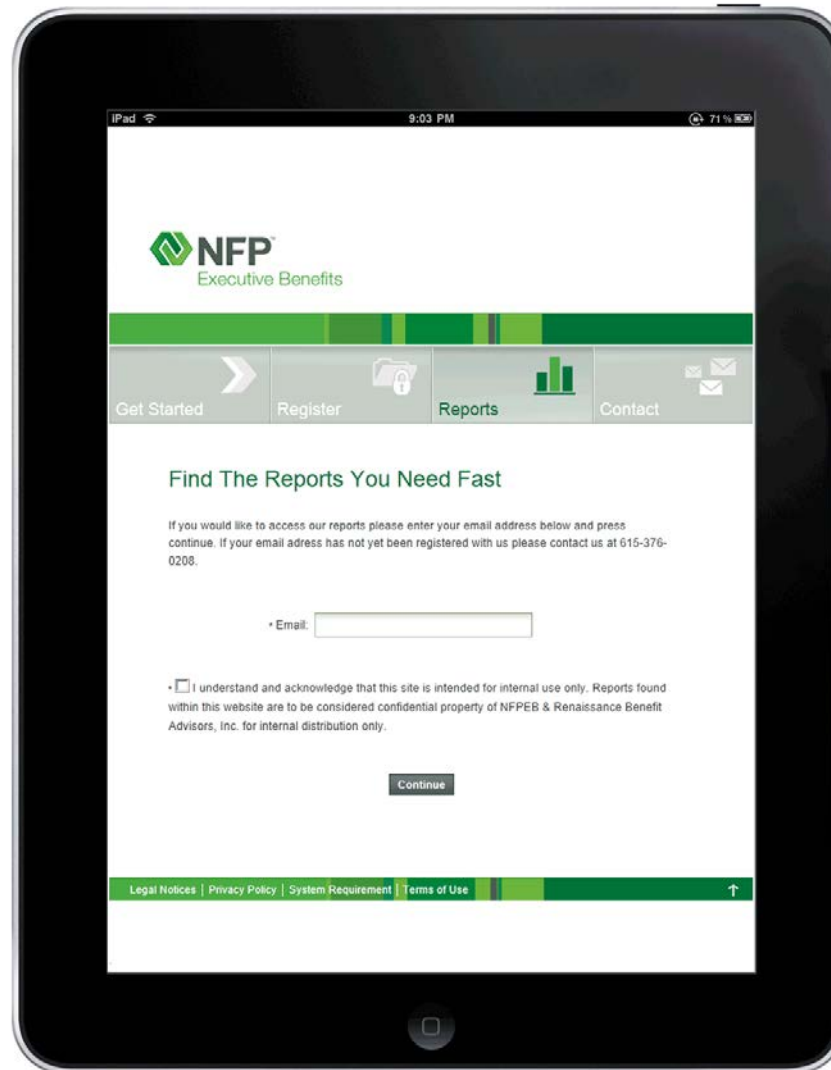
BOLI Bank Summary Report App



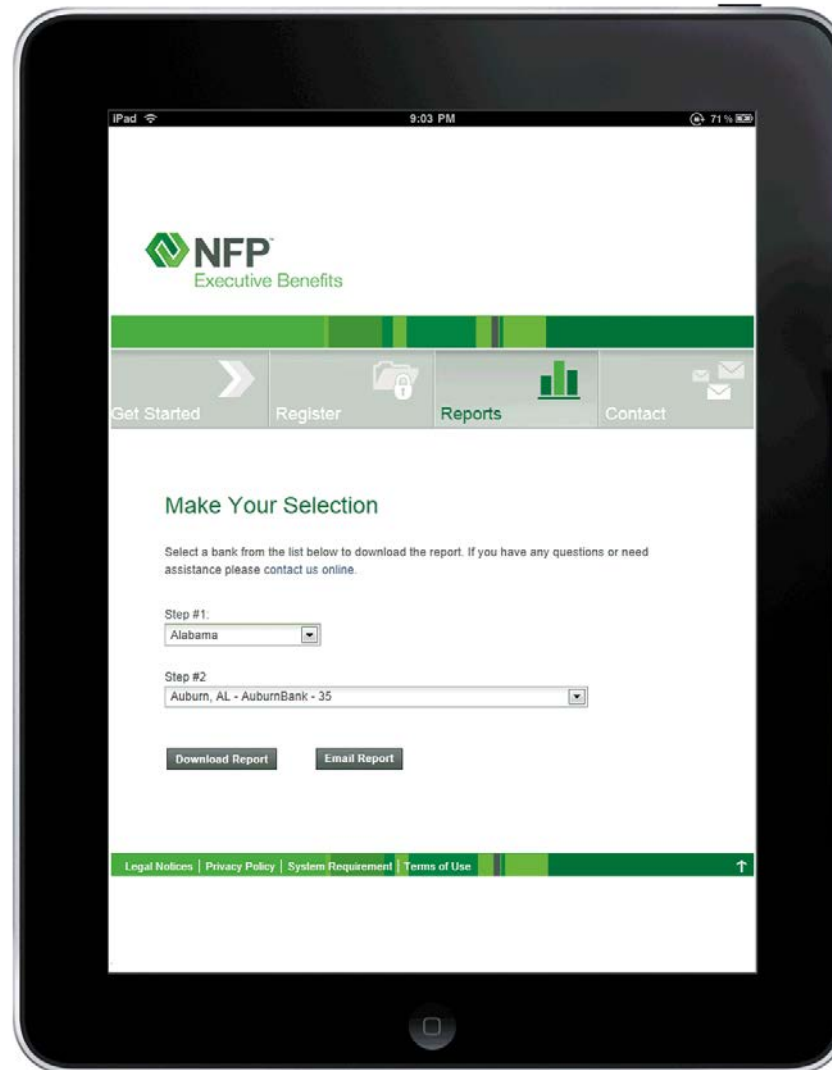
BOLI Bank Summary Report App



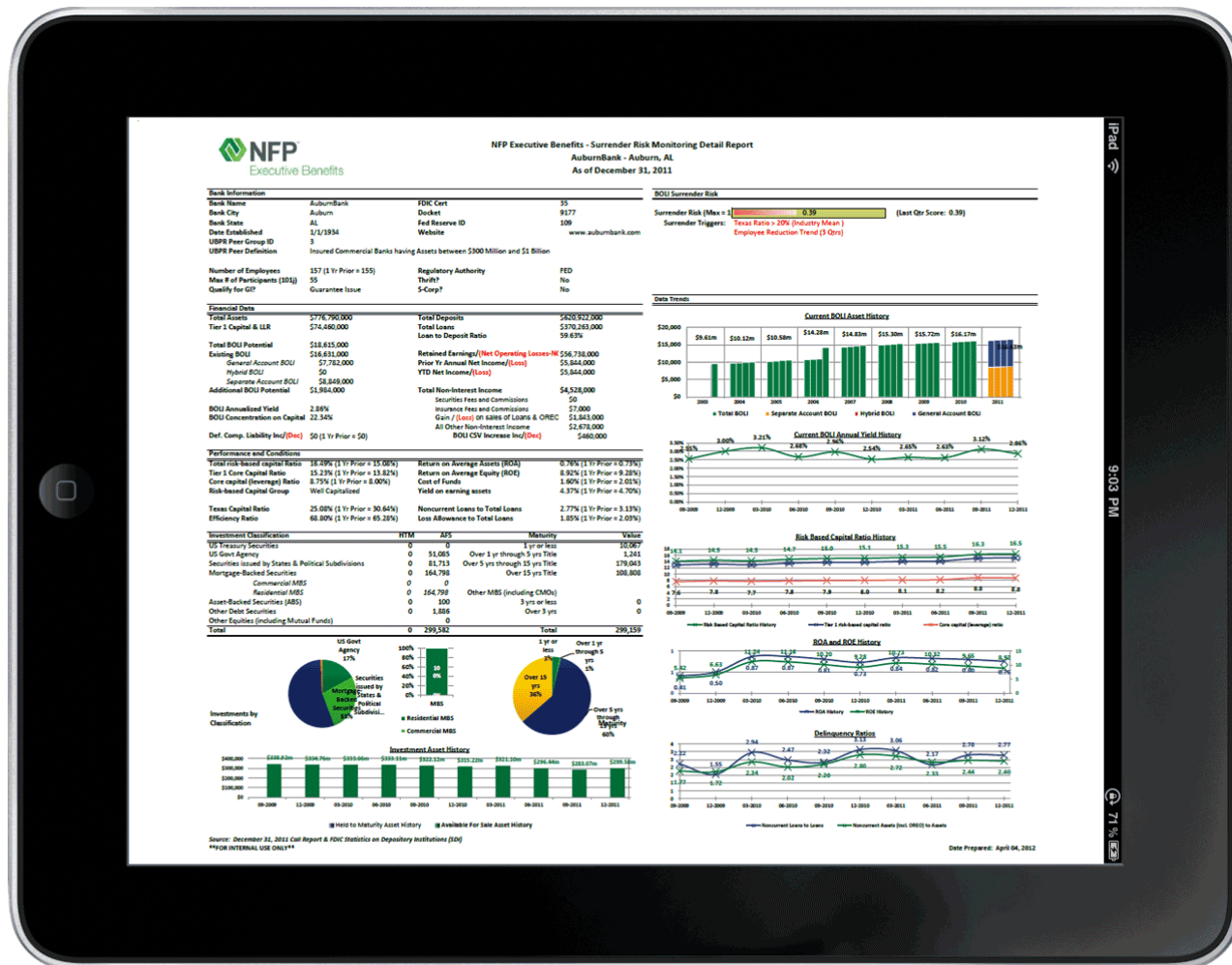
BOLI Bank Summary Report App



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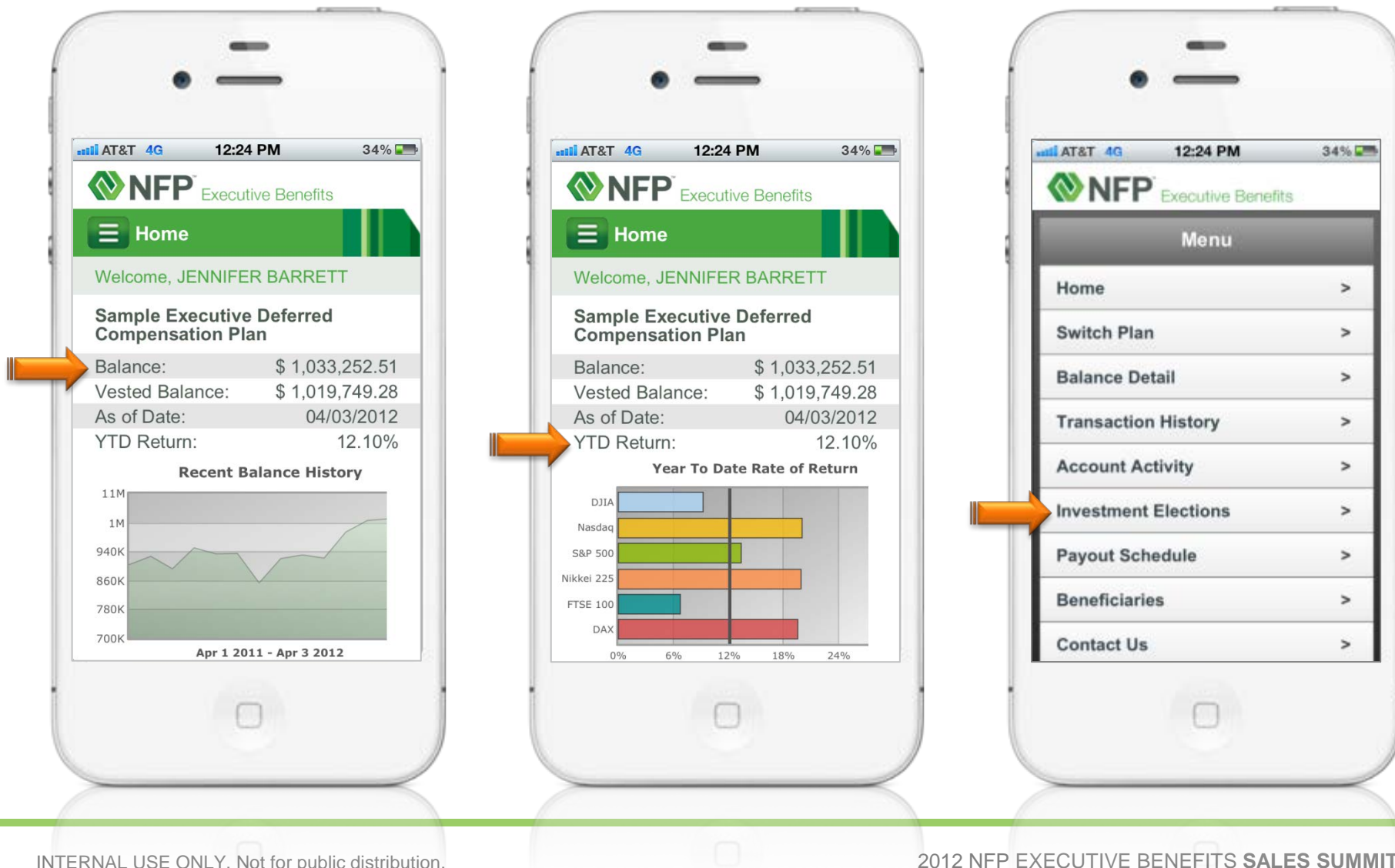
Latest Innovation

Mobile App

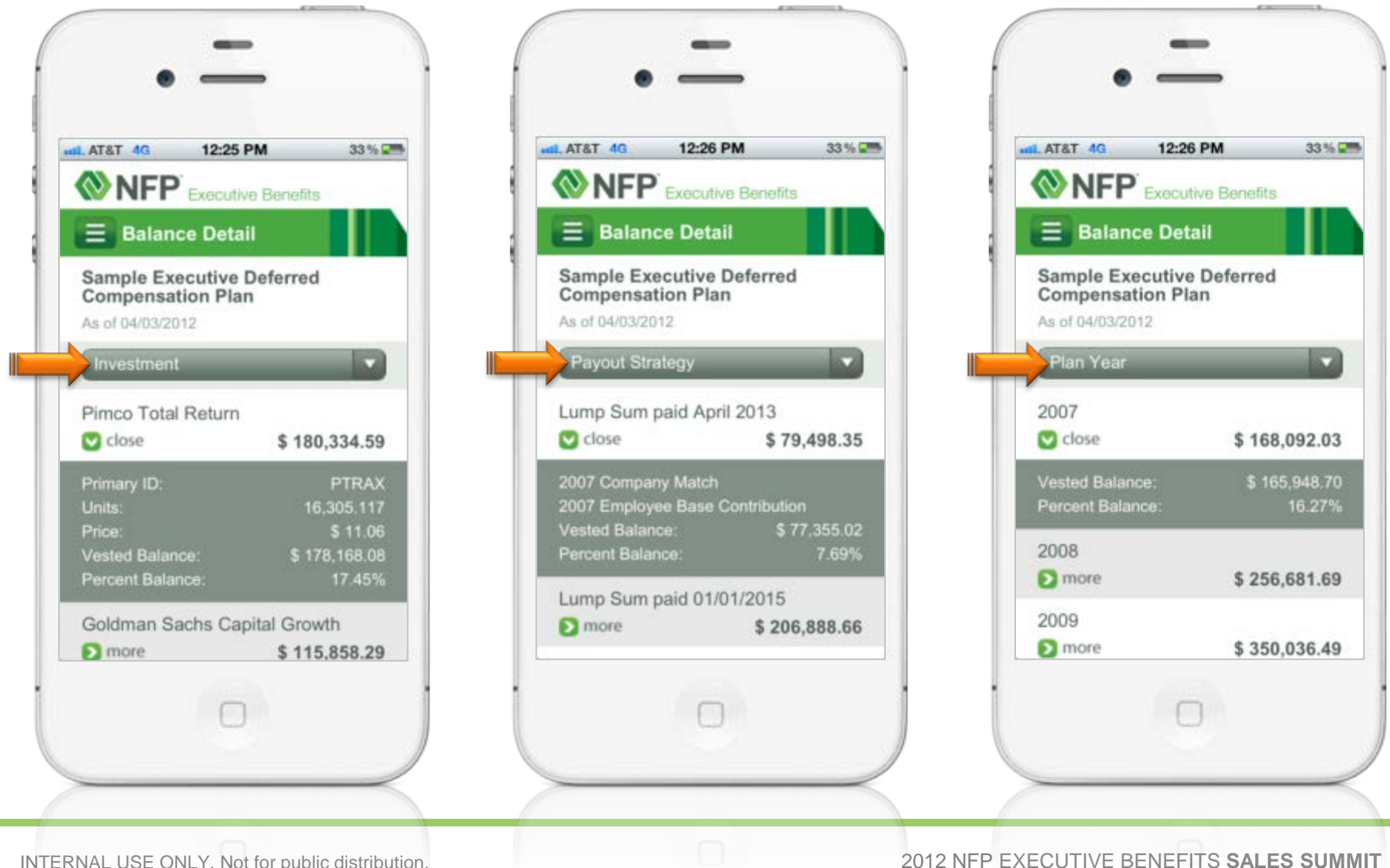
- NFP Exec
 - iPhone/iPad
 - Android
 - Windows



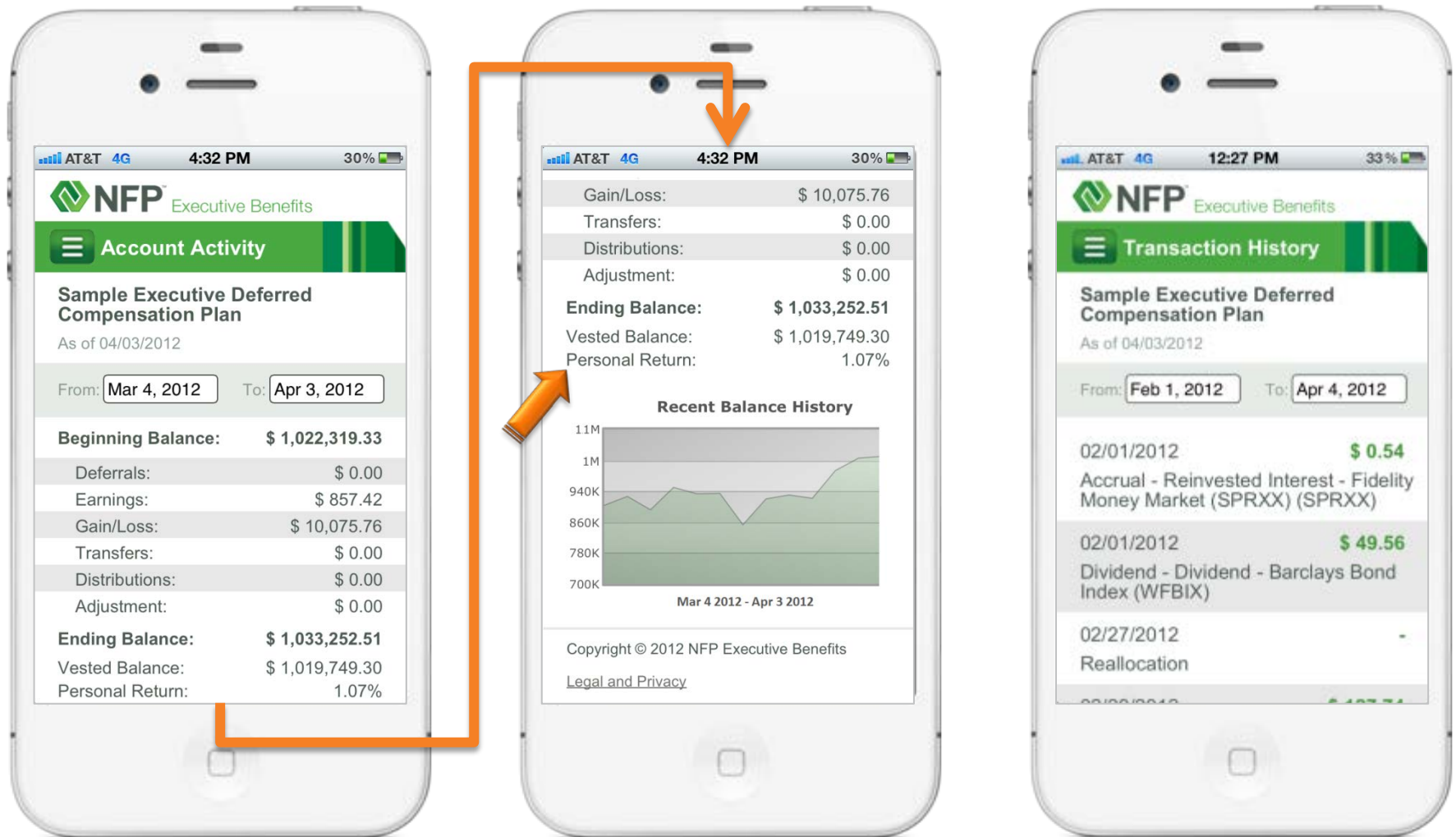
Everything the NQDC Plan Website Can Do



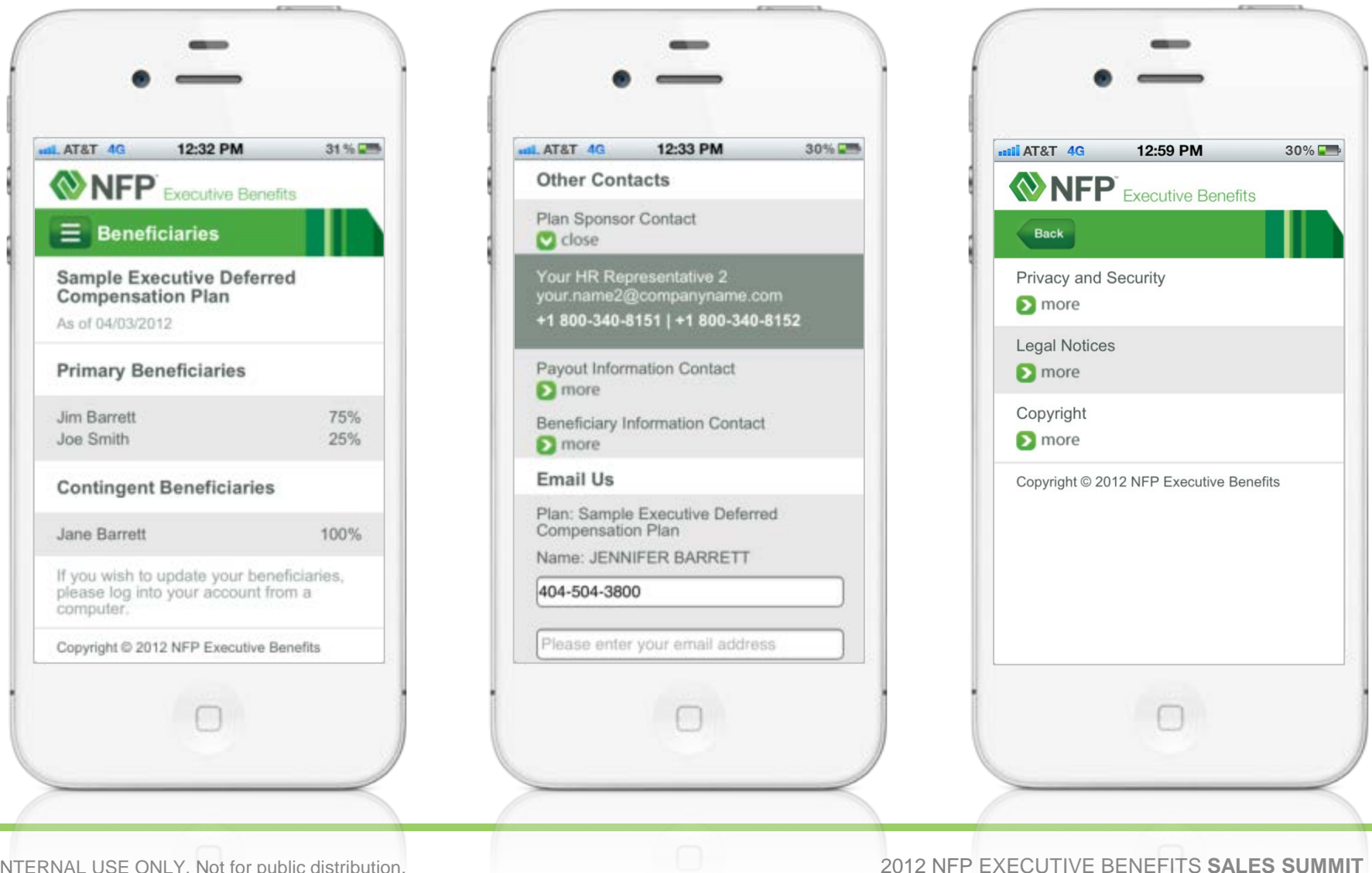
Account Detail the Way You Want It



Without Limitations



And Pertinent Information



Let us know what else you need



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