



Lincoln Financial Accelerates Social Selling Program and Increases Inbound Web Traffic from Social Media by 50%

Lincoln Financial Group provides advice and solutions that empower people to take charge of their financial lives with confidence and optimism. Lincoln Financial Group's core business areas - life insurance, annuities, retirement plan services and group protection - focus on supporting, preserving and enhancing people's lifestyles and retirement outcomes. Lincoln Financial Distributors markets and sells Lincoln-manufactured variable and fixed annuities, life insurance and investment management products through financial advisors, financial intermediaries and sales professionals.

THE CHALLENGE

Lincoln Financial Group saw the opportunity to take a more strategic approach to social selling to drive greater demand for their financial services in a more authentic way. The Distribution Marketing team knew that delivering the right social media tool to their field of wholesalers was going to be critical in driving adoption, efficiency, and ultimately delivering the right business outcomes. In addition to ease of use for program administrators and the field, a key component of the social selling program was ensuring the technology provided a strong foundation of compliance so the team could confidently mitigate regulatory risk and ease the burden of Compliance leaders across their organization. The Lincoln Financial Distributors team didn't want just a vendor, they wanted a partner - and Hearsay fit the bill.

300%

increase in program adoption

114K

social impressions driven by social selling program

1.8K

clicks generated

~50%

of inbound website traffic from Hearsay social selling program posts

THE SOLUTION

Partnering with Hearsay Systems gave Lincoln Financial Distributors the power to compliantly arm their field with the technology necessary to accelerate social selling - increasing demand and driving more business. Deploying Hearsay Social to 350 wholesalers required close orchestration between the Lincoln Financial Distributors marketing leaders and the Hearsay team and included tailored training and an instrumental digital toolbox. The team also leveraged Hearsay's Dynamic Campaign functionality to create custom campaigns delivering an automatic, steady stream of regional content through the wholesalers' profiles. The supervision and archiving tools streamlined the approach to compliance and helped to mitigate corporate risk without adding a significant workload onto their internal Compliance team. In addition to their strategic approach to adoption, the Lincoln Financial Distributors team was keen on tying their efforts back to business outcomes and implemented Hearsay's URL Attribution and Tracking functionality to quantify the impact of the social selling program.

THE RESULTS

Lincoln Financial Distributor's comprehensive strategy and dedication to success set the program up for success right from the start. The combination of Hearsay Social and Lincoln Financial Distributor's forward approach to wholesaler onboarding resulted in a 300% increase in adoption to the social selling program. This massive increase led to more than 114K impressions and 1.8K clicks across social posts. Not only did the program show early reach and engagement results, but the company also found upwards of 50% of inbound traffic to the Lincoln Financial website was driven by wholesalers as the Hearsay Social program has grown - up from 28% at launch.

“The transparency we get in our partnership with Hearsay and how Hearsay is able to perfectly serve our industry has made it one of the easiest decisions we've made. We are looking forward to moving forward in rolling out a CRM integration next!”



Scott Carlisle
AVP Digital Marketing
& Collaboration

Find out how Hearsay can help your advisors and agents, contact us at:

VISIT hearsaysystems.com

EMAIL contact@hearsaysystems.com

CALL +1 844-556-4396

ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisers and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world's leading financial firms—including Allstate, New York Life, Morgan Stanley, and Charles Schwab—rely on Hearsay's SaaS platform to scale their reach, optimise sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with globally distributed teams throughout North America, Europe and Asia.

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