

Field Bulletin

October 2nd, 2024

FB 24-136 | For Financial Professional Use Only

This field bulletin supplements FB 23-135 and FB 24-004

Audience: Equitable Advisors Financial Professionals

Re: Equitable Advisors Marketing SuiteSM – introducing expanded Social Media capabilities and the decommission of Hearsay Social

From: Wealth Management Digital and Marketing

Action Needed: Financial Professionals (FPs) utilizing social media (Facebook Business Pages and/or LinkedIn) for business purposes must connect their social accounts through Marketing Suite and Proofpoint Patrol by November 29, 2024. Hearsay Social is being replaced by Proofpoint Patrol as Equitable Advisors new social media supervision tool.

What's new:

Highlights for 2024:

- Equitable Advisors Marketing SuiteSM powered by FMG is the new integrated advisor marketing platform for email, website and now social media.
- Access to Marketing Suite (exclusive of websites) is included within the basic Digital Essentials package.
- Marketing Suite is now integrated with Proofpoint Patrol, the new tool for social media supervision.
- FPs will connect their social media business profiles to Marketing Suite & Proofpoint Patrol. Once FPs have successfully connected, access to Hearsay Social will be removed.
- Social media business profiles that were previously approved in Hearsay will be auto approved in Proofpoint Patrol within 24 hours of connecting your account(s).
- Reviews of new social media profiles and updates to existing will be reviewed by Regional Compliance Teams.
- Marketing Suite is integrated with Change User Role allowing access to administrative staff members or joint work partners.
- Onboarding and training support will be available through national webinars, complex-led training, and self-serve video trainings and reference materials.
- New social media content will continue to be posted to both platforms until 10/21/2024. After that date, new social media content will only be posted to Marketing Suite.
- Existing Hearsay users will need to notate any future social media content in Hearsay and replicate in Marketing Suite. Users will be removed from Hearsay 1 week after connecting successfully to Marketing Suite and Proofpoint Patrol.
- Hearsay Social will be fully decommissioned by 11/29/2024 and all user access and scheduled social media posts or campaigns cancelled by that date.

When:

- Access to new social media functionality within Marketing Suite will be available to all FPs subscribing to Digital Essentials on 10/7/2024.
- Addition of new social media users to Hearsay Social has been discontinued effective 9/16/2024.

- Beginning 10/22/2024, new social media content will only be posted to Marketing Suite.
- Hearsay Social will be fully decommissioned by 11/29/2024.
- Onboarding support for existing FPs and their administrative staff will continue through early December.

For More Information:

- See the following pages for details.
- Please visit the [program microsite](#) and [EAVU](#) to review training materials and reference guides for Marketing Suite.
- If you have questions, contact advisormartech@equitable.com or reach out to your complex digital or marketing specialist.

Program Overview

Equitable Advisors Marketing SuiteSM powered by FMG is the new integrated advisor marketing platform for email, website and social media. Through our partnership with the Honor Guard, National Associate Forum and Elite Advisor Group, numerous vendors were vetted to find one with great designs and content, and an easy-to-use platform. After completion of a series of field user pilots, we are pleased to introduce the new social media functionality within Marketing Suite and Proofpoint Patrol to all FPs on October 7th, 2024.

The new social media functionality within Marketing Suite and Proofpoint Patrol will replace the social media capabilities of Hearsay Social and is available to all FPs and their staff members via Change User Role effective 10/7/2024 as part of basic digital essentials. Please note that the website offering replacing Emerald Websites as introduced in [FB 23-135](#) is also available, but at an additional subscription cost described in the field bulletin.

New Functionality Overview

Marketing Suite introduces new social media capabilities as described below:

- Proofpoint Patrol (Patrol) is the new platform introduced for social media supervision. Patrol is a third-party vendor engaged to enable Equitable Advisors to monitor social media activity, conduct social media message surveillance, and archive all content posted to connected business social media pages. Patrol ensures that applicable company policy and existing regulatory obligations and compliance requirements are met.
- Proofpoint Patrol and Marketing Suite are integrated for a seamless user experience.
- Content Library – The content library has been expanded to support social media with pre-approved social media content, social media sequences in addition to the existing web content, emails, email sequences, greeting cards and downloadables.
- Social Foundations Automated Marketing Campaign – A social foundations campaign is available to push content to your connected social accounts. This campaign allows you to select timing of posts and mix of topics to include in a “Set and Forget” fashion. Campaign is turned off by default but is easily toggled on and configured to use.
- Custom Social Media Content– FPs can create and customize social media posts to publish to connected and compliance approved social media accounts. The advertising compliance review process is

unchanged but is integrated within the platform. Review the Custom Content Social Media QRC for additional information.

- Compliance Dashboard – Compliance review and history for social media posts is now added to the existing compliance dashboard within Marketing Suite.
- Profile updates - FPs can make social media profile updates within Marketing Suite with the integration of Proofpoint Patrol. Refer to the QRC-Updating Social Media Profiles, LinkedIn Profile Fields QRC and Facebook Profile Fields QRC for further details
- Shared and Scheduled - FPs can navigate to the Social Media Shared and Scheduled tab to view social posts that have been shared or are upcoming.
- Marketing Calendar – the in-platform Marketing Calendar now includes scheduled social posts for the upcoming 2 weeks.
- Administrative staff members who have been granted access to Marketing Suite via Change User Role will also have access to the new Social Media functionality. Please note, however, that the FP must personally connect their business social media accounts before the administrative staff can post to connected accounts on their behalf. If CUR access has not already been established, utilize the Change User Role Administration tool to set CUR access up. CUR set up will take 24 to 48 hours to complete. Please follow the steps in the Change User Role QRC for more information.

Training and Rollout Support

Onboarding support for Q4 2024 will include:

- National Onboarding webinars: these webinars will begin the week of October 7th and focus on guiding users through the steps to successfully connect their social media accounts to the platform and providing an overview of new social media functionality. User profiles must be reviewed and approved by BCMs prior to utilizing the Marketing Suite. For a full list of the National Onboarding Webinars, please view the National Training Calendar.
- Office hours – Biweekly office hours are scheduled to allow users to dial in with questions related to Social Media functionality.
- Resources (including videos, Quick Reference Guides, onboarding checklist, templates and a link to the extensive FMG knowledge database) can be found on the microsite and in EAVU>Digital Tools>Marketing Suite
- We strongly recommend that your administrative staff members attend these scheduled calls to become familiar with the platform and assist in your social media and marketing efforts.
- Local support from your Complex Digital and Marketing lead is also available.
- Questions can also be forwarded to the shared mailbox: advisormartech@equitable.com

We recommend that all users take advantage of these onboarding and training opportunities as early in Q4 as possible to become familiar with the new platform prior to the decommission of Hearsay Social on November 29, 2024.

For More Information

- Please visit the [program microsite](#) to review training materials and reference guides and in [EAVU](#) >Digital Tools>Marketing Suite.
- If you have questions, contact advisormartech@equitable.com or reach out to your complex digital or marketing specialist.
- Stay tuned for further communications on this transition.