



EQUITABLE

Advisor MarTech

Social Media Workflows

November 11, 2024



Pre-Approved | Home-office



Background

The objective of this mapping exercise is to document the workflow for the posting of pre-approved content to social media networks using social media tools on the Equitable Advisors Marketing Suite.

This map includes the following components: 1) the process, 2) the people involved, and 3) technology leveraged throughout the workflow.

Scope

The workflows will illustrate the process for posting pre-approved content to a financial professional's social networks using the functionality within the Marketing Suite.

Use Case

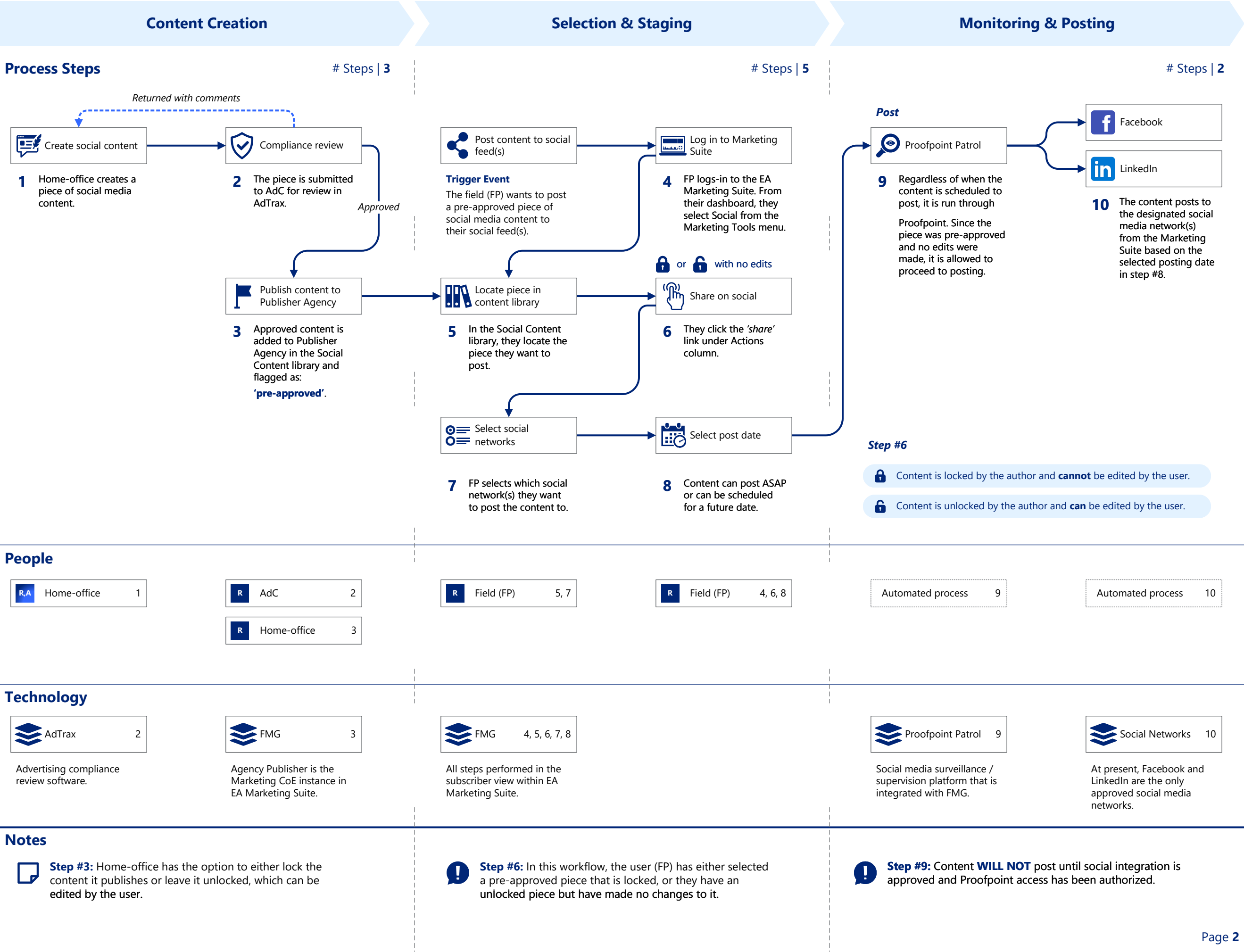
An Equitable financial professional (FP) wants to post a new piece of pre-approved content to their social media network(s).

Scenario

The home-office team has created a new piece of social media content that the FP feels is very relevant to their practice. To generate awareness, they decide to post the piece to both their Facebook and LinkedIn feeds.

KPIs

- Engagement (likes, shares, comments)
- Click-through rates
- Reach and impressions
- Conversion / lead generation



People

Technology

Notes

RA Home-office 1

R AdC 2

R Home-office 3

R Field (FP) 5, 7

R Field (FP) 4, 6, 8

Automated process 9

Automated process 10

AdTrax 2

FMG 3

FMG 4, 5, 6, 7, 8

Proofpoint Patrol 9

Social Networks 10

Step #3:

Step #6:

Step #9:



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Use Case

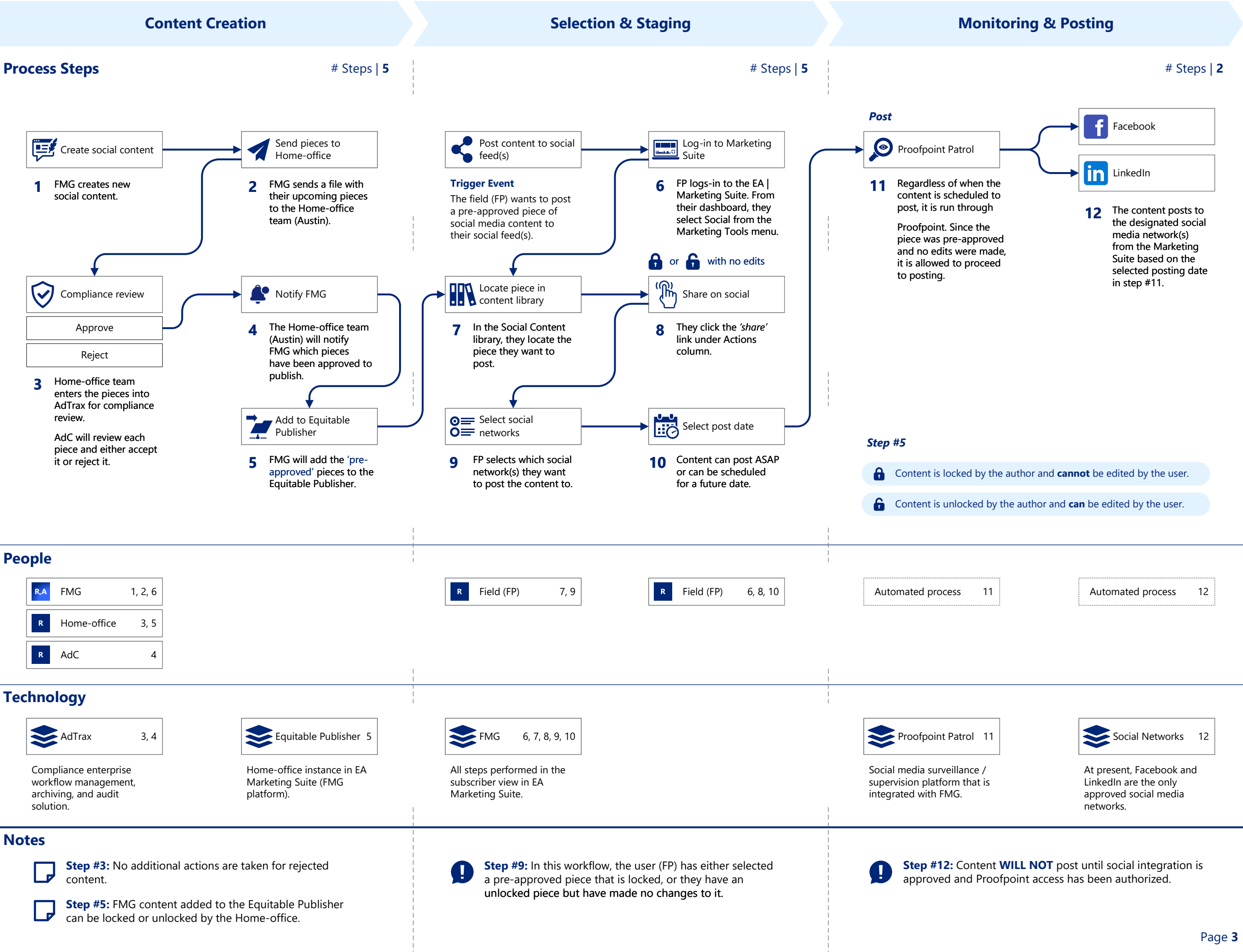
An Equitable Advisors financial professional (FP) wants to post a new piece of pre-approved content to their social media network(s).

Scenario

FMG has created a new piece of social media content that the FP feels is very relevant to their practice. To generate awareness, they decide to post the piece to both their Facebook and LinkedIn feeds.

KPIs

- Engagement (likes, shares, comments)
- Click-through rates
- Reach and impressions
- Conversion / lead generation





Background

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This map includes the following components: 1) the process, 2) the people involved, and 3) technology leveraged throughout the workflow.

Scope

The workflows will illustrate the process for posting pre-approved content to a financial professional's social networks using the functionality within the Marketing Suite.

Use Case

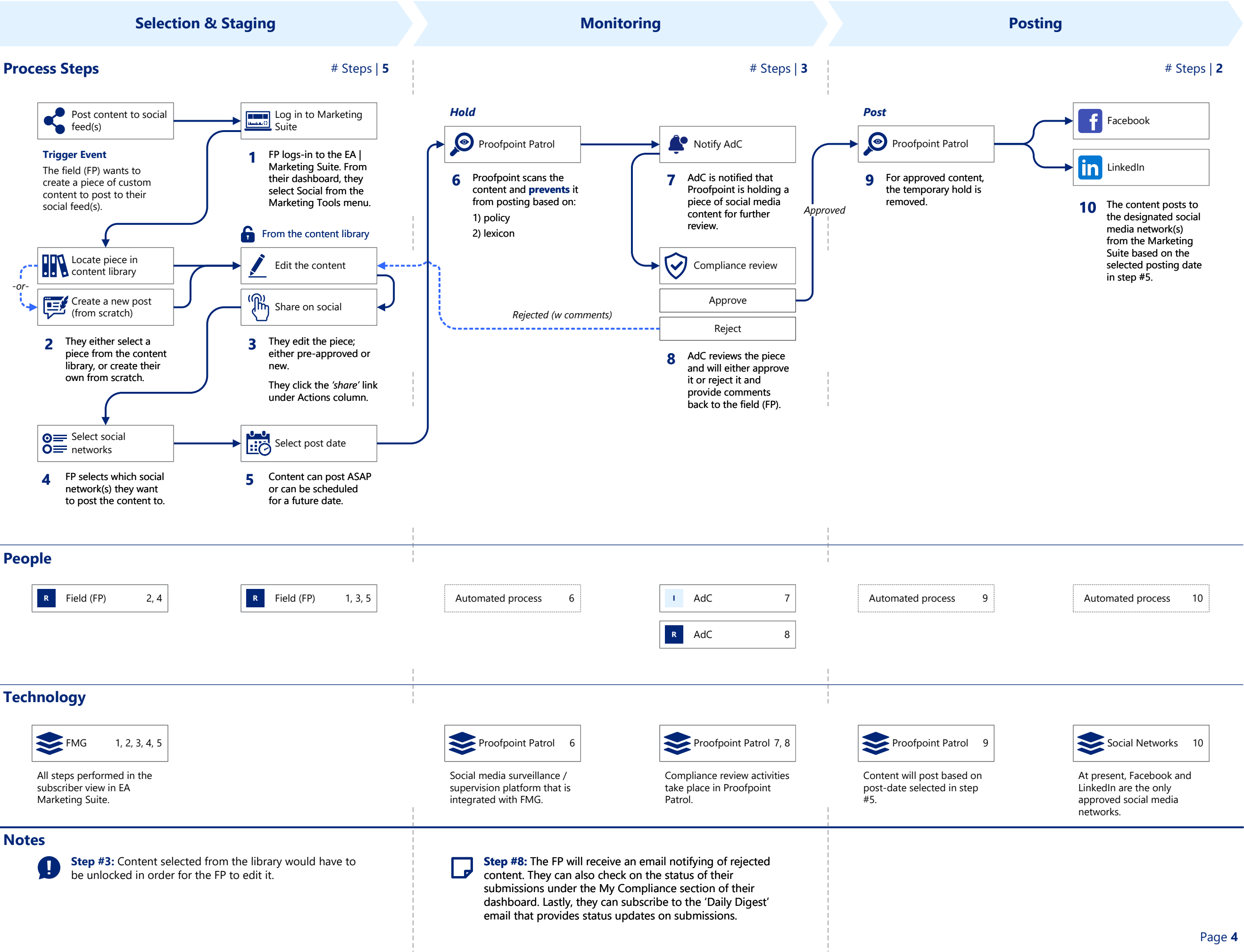
An Equitable Advisors financial professional (FP) wants to: a) create a new social post from scratch, or b) post a piece of pre-approved content, but wants to modify it.

Scenario

The FP creates a new post from scratch or finds a pre-approved piece of content that they want to post to their Facebook and LinkedIn feeds. However, they want to modify the pre-approved piece before posting it to make it appear more personalized.

KPIs

- Engagement (likes, shares, comments)
- Click-through rates
- Reach and impressions
- Conversion / lead generation





Background

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This map includes the following components: 1) the process, 2) the people involved, and 3) technology leveraged throughout the workflow.

Scope

The workflows will illustrate the process for editing user profiles on social networks using the functionality within Marketing Suite and Proofpoint.

Use Case

An Equitable Advisors financial professional (FP) wants to: edit their social media profile(s).

Scenario

The FP has recently received a professional accreditation and wants to update their profiles on their LinkedIn and Facebook feeds to highlight the new accreditation.

KPIs

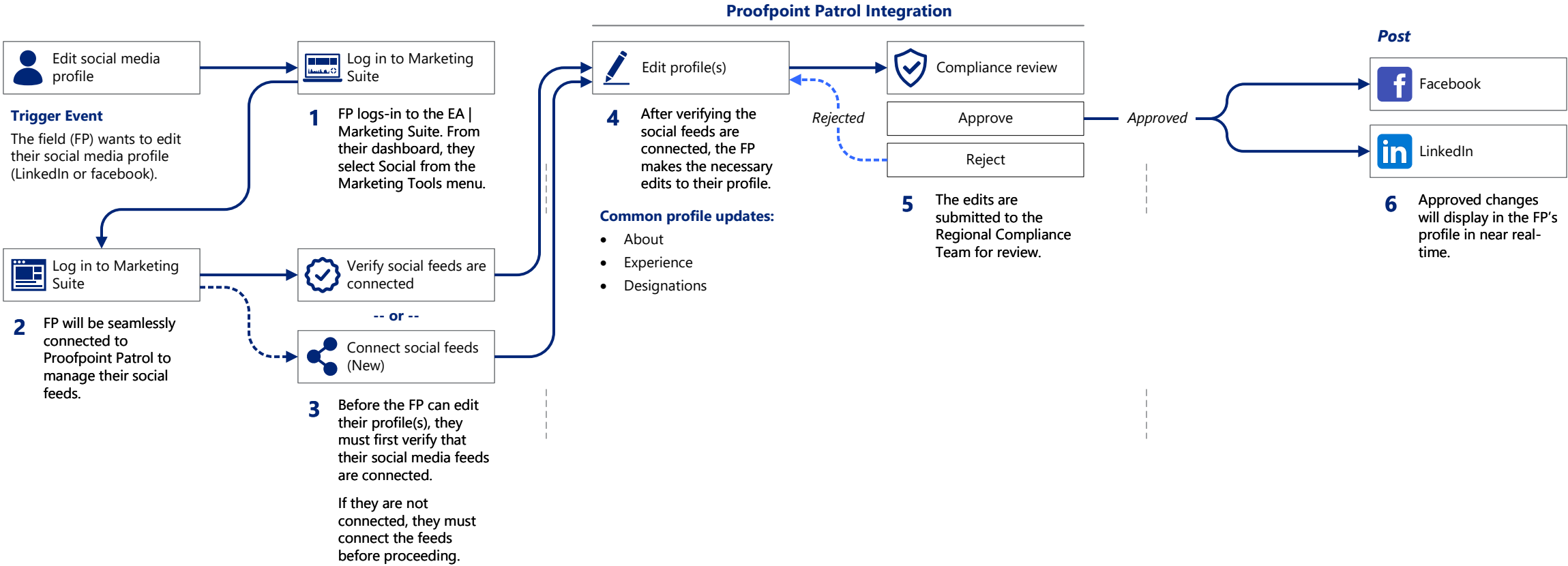
- Engagement (likes, shares, comments)
- Click-through rates
- Reach and impressions
- Conversion / lead generation

Process Steps

Steps | 3

Steps | 2

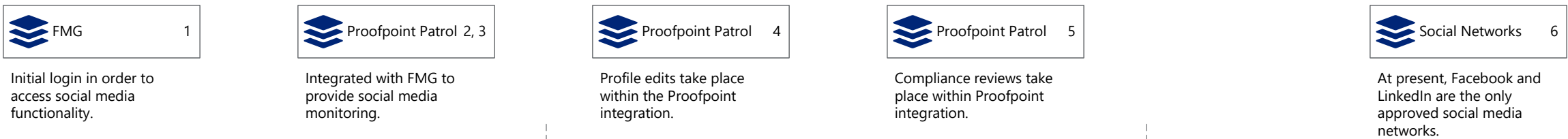
Steps | 1



People



Technology



Notes

- In general, the need to connect social media accounts will only apply to new users. Existing users will likely already have their social feeds connected.
- Native updates like change of email address or URL must be performed on the social network directly. They cannot be made in Proofpoint and will be denoted as being uneditable.
- Make sure all required disclosures are included.



Background

This mapping exercise documents the workflow for the onboarding of new and PEP (Preliminary Employment Period) advisors to allow them to use the social media functionality within the Equitable Advisors Marketing Suite

This map includes the following components: 1) the process, 2) people involved, and 3) technology leveraged by phase.

Scope

The workflow illustrates the process for onboarding an advisor so they can post content to their social media network of choice including Facebook Business Pages and/or LinkedIn.

Use Case

An advisor wants to being posting content to their social network(s).

Scenario

An advisor (EXP or PEP) has just joined Equitable Advisors. As part of their onboarding, they want to leverage the social media functionality within Equitable Advisors Marketing Suite as part of their broader marketing planning.

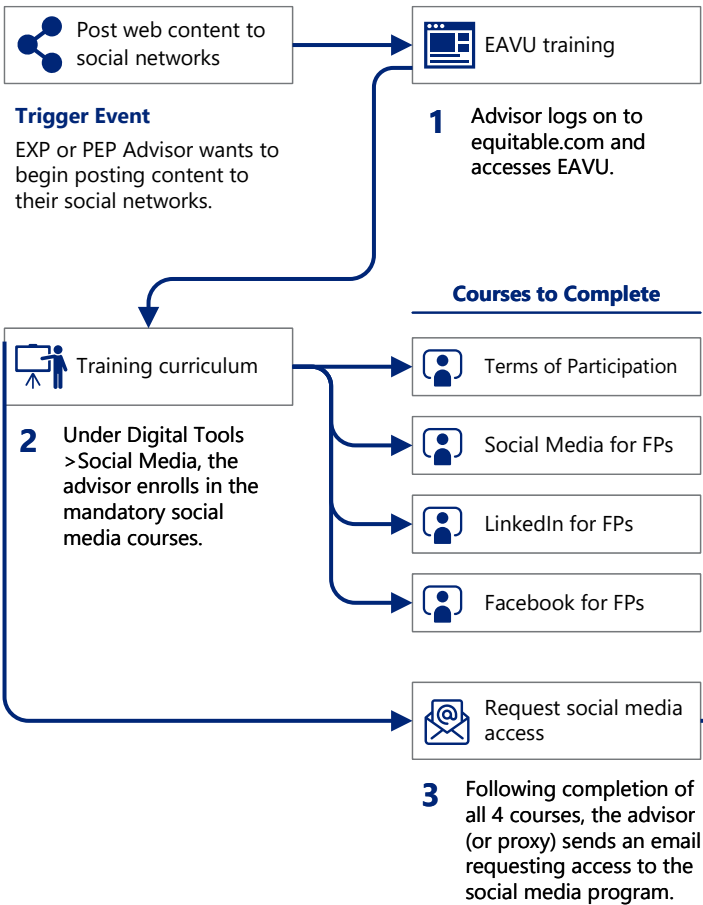
Measurement

- Engagement (likes, shares, etc.)
- Reach & Impressions
- Click-Through-Rate (CTR)
- Conversion & Lead Gen.

Mandatory Training

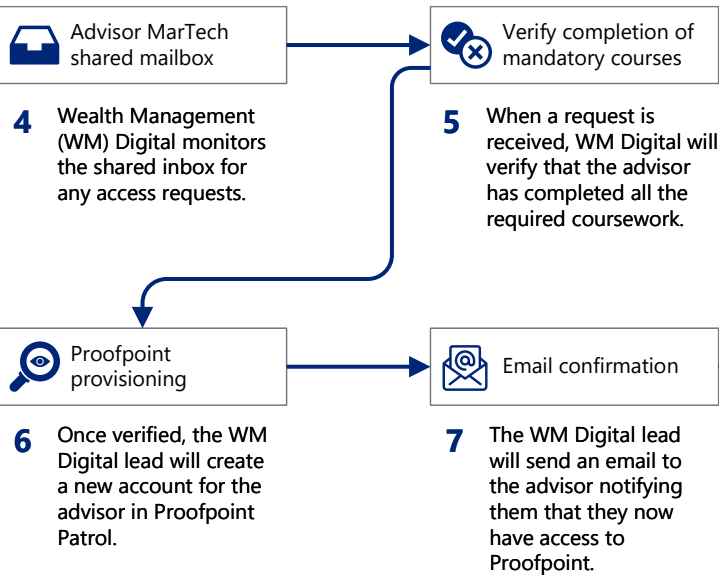
Process Steps

Steps | 3



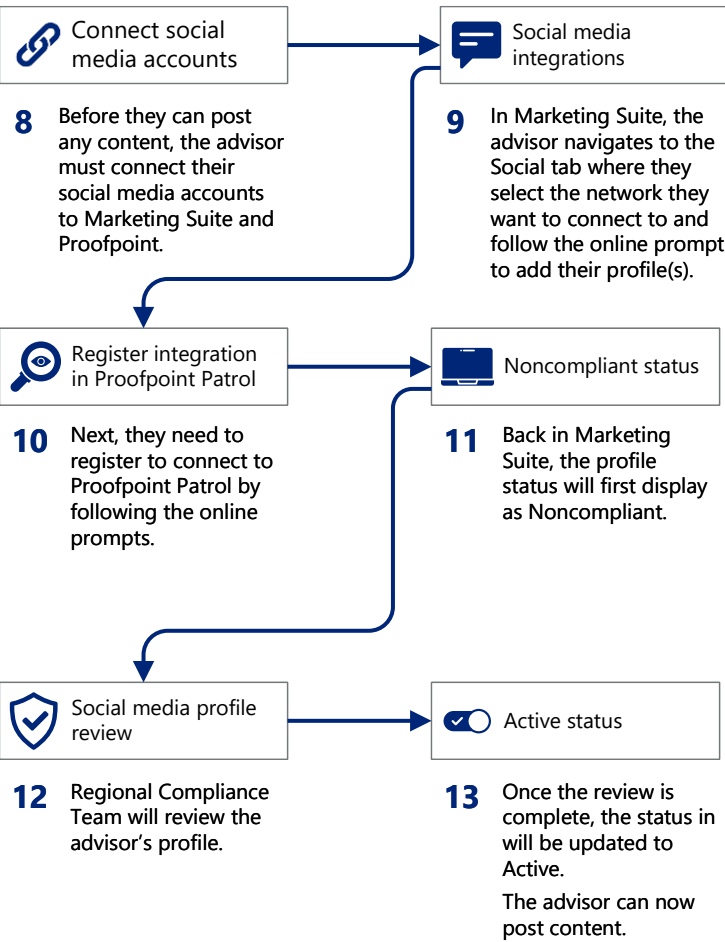
Provisioning

Steps | 4



Account(s) Connection

Steps | 6



People

R,A Advisor 1,2	R Advisor (Proxy*) 3	R WM Digital 4,6	R WM Digital 5,7	R Advisor (Proxy*) 10	R Advisor (Proxy*) 9
Proxy could be Complex Mktg. or Complex Digital leads.	I WM Digital 3	I Advisor (Proxy) 7	R Reg. Compliance 12	I Advisor (Proxy*) 13	

Technology

EAVU Training resources on the Advisor Portal.	Proofpoint Patrol Social media surveillance platform that integrates with FMG.	Proofpoint Patrol Register integration(s) post-provisioning	Subscriber Account (FMG) Initiate network integrations; monitor status
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Notes

- Link to [social media training resources](#) on EAVU.
- Email address to request Proofpoint provisioning: advisormartech@equitable.com

Step #12: If the Regional Compliance team cannot approve the profile in its current state, they will provide feedback to the advisor to give them the opportunity to bring the profile into compliance.