Generali Teams Up with Sociabble to Turn its Agents into Expert Social Advisors

With Sociabble, Generali were able to make their agents leaders in online sales and communication.

Established in 1831, Generali has a long history as a leader in the insurance industry. But they wanted to take their leadership online as well. And together with Sociabble, they were able to make their agents leaders in online sales and communication.

When it comes to the insurance business, the agents themselves have always been at the core of the industry. They are the human link between customers and clients. But while their fundamental role has not changed over the years, the ways to build and maintain that human contact have.

Digital transformation and social media have created a new landscape, with new challenges and new possibilities. As a leader in the industry, Generali knew that the next step was to help their agents become experts in this new domain, and bring their talents and skills to the online, social media realm.

And together with Sociabble, they were able to train, on-board, and reward their staff for adopting a new way of interacting with potential and existing clients.

In this case study, you will learn...

01

The background of **Generali**

02

The **challenges** they faced online

03

The **solutions** they created, together with Sociabble

04

The **results** of their Social Selling & Employee Advocacy initiative

05

Tips they have for other companies

About Generali

More than 72 000 employees

Founded in 1831

Offices in over 50 countries

Serving 65.9 M customers

The Background of Generali

Established in 1831, Generali is one of the largest and most respected global insurance and asset management providers around, with offices in over 50 countries, with more than 72,000 employees serving 65.9 million customers.

And agents are still the core of the business—that hasn't changed, even in the face of digital transformation and increases in remote work.

Keeping these teams of agents, located in offices around the world, connected to the central brand while empowered to build leads at a distance has become a new priority—without sacrificing the company's traditional commitment to longtime, meaningful partnerships with its customers.

To quote Michele Poretti, the Generali Group Head of Distribution Experience: "At Generali, we think our agents are the key distribution channel... But we also think we need to empower our agents with digital tools to make them even more productive and effective."

The results

The initial 30% active rate among agents is now approaching their primary KPI goal of 50% active

Generali knew they needed a new digital tool, with the following requirements:

01

EASY TO USE.
Adoption among agents was key, without complicated training required.

02

PROVIDES RELEVANT CONTENT.
This helps with content marketing, and triggers conversations with agents and prospects. According to Michele Poretti, "Giving a platform without content is like giving a car without gas. We really believe that now days, content is playing a very important role."

03

MOBILE-FRIENDLY.
Agents must be able to access it when they are on the go, via a mobile app.

Which brought Generali to the decision of which digital tool to use to empower their new Employee Advocacy and Social Selling initiative— and which company to partner with.

The Challenges Generali Faced

With the nature of agent/client interactions changing, and with so much of that interaction taking place online, Generali knew they had to adapt to bring the same level of service, commitment, and involvement to the digital and social media spheres— while also ensuring that the agents themselves were eager to be involved in the actual process.

According to Michele Poretti: "The key challenge is the adoption, because I think putting out a tool for the agents is easy. What is difficult is changing their habits." A digital transformation of sorts was already taking place before the Covid health crisis, with increased digital meetings and remote work centered around pre-sales, but the pandemic's arrival effectively cemented a policy that was becoming more widespread regardless.

Agents needed the ability to build their own personal brand online, as well as establish their status as thought leaders in the field, no matter where they were physically located. This was crucial to allowing them to continue to build leads and connect with prospective and existing clients.

Social media in the insurance industry was no longer a "nice to have," but an essential.

The Solutions They Launched with Sociabble

After weighing their options and comparing solutions, Generali decided to partner with Sociabble, to launch a new digital platform and empower their workforce as online advocates and social advisors. They made this choice for several reasons, all of which had to do with the unique features that Sociabble offered, and that addressed the criteria above. For example:

EASY ONBOARDING.

Sociabble is simple and intuitive, with very little training needed to become proficient with the platform. However, in the event of problems, Sociabble offers a CSM support team, with offices in Paris, London, New York, and Mumbai—so help is never far away for training and support.

### LIFESTYLE AND PREVENTION CONTENT, READY TO SHARE.

Because Sociabble partners with studioID - Industry Dive's global content studio, Generali can ensure that a steady stream of curated content continues to flow for its agents to share and comment on.

SIMPLIFIED LOCAL FACEBOOK PAGE MANAGEMENT.

Agents have always used Facebook pages to promote their own local activities with local clients. Thanks to the advanced integration of Sociabble with Facebook, agents can manage company content in ways they could not as regular Facebook users.

A MOBILE-NATIVE APP.

The Sociabble interface doesn't simply work on mobile— it's designed for mobile, offering a smooth, complete experience even when agents are on the go, or away from their desk. Plus, the app comes complete with push notifications and alerts, so that agents never miss important content or news.
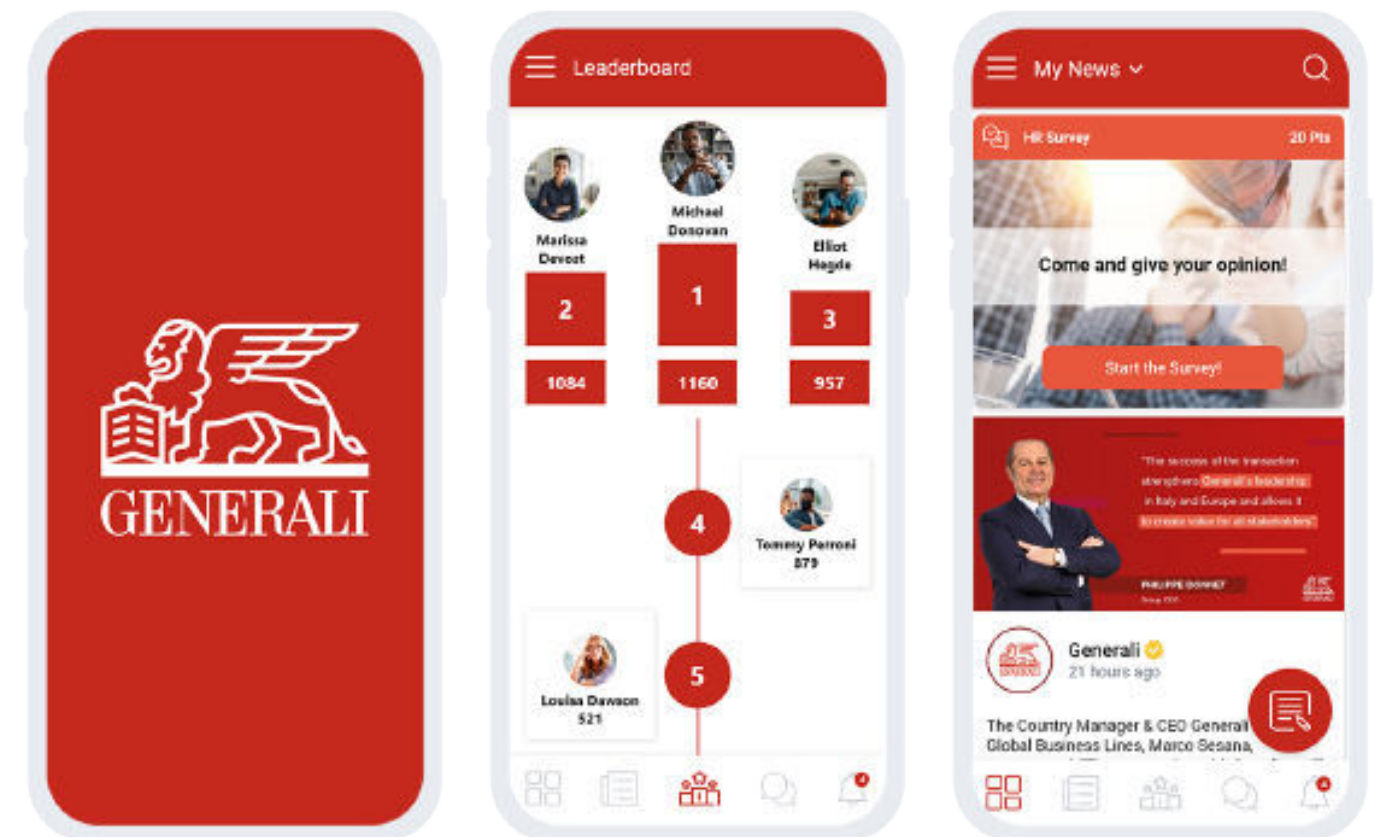
> ## Giving a platform without content is like giving a car without gas. We really believe that now days, content is playing a very important role.

Michele Poretti
Group Head of Distribution Experience
GENERALI

Together with the Sociabble team, Generali created a strategy that involved partnerships with all the different global regions, with Digital Sales Champions selected from each market. Each Champion became a Social Advisor ambassador within their specific channel.

This decentralized approach gave the program flexibility, and allowed it to adapt to the specific needs of different regions. Thanks to the platform's global/ local admin features, the information flow was always both steady and locally relevant. According to Michele Poretti, "It's very important to be close to the market, and to really understand the differences and the nuances that each market has." In summary:

"Sociabble is a dynamic and flexible company that's able to fulfill the needs of a global corporation like Generali."

The Results of their Social Selling & Employee Advocacy Initiative

The Digital Visibility program for agents launched by Generali on the Sociabble platform has been a success in that it's been adopted by thousands of agents—the initial 30% as sharing content four or more times per month), and it's now approaching their primary KPI goal of 50% active.

Additionally, the initial goal of 4 content shares per month, per agent, has been easily reached, thanks to relevant content and transparent sharing capabilities provided by the Sociabble platform. The program has already been deployed in offices in Italy, France, Slovenia, Vietnam, Switzerland, Austria, and the Czech Republic, proving that a largescale Employee Advocacy and Social Selling initiative across multiple countries and cultures can work. As for next steps for the program, Generali is currently exploring the possibility of using Sociabble's built-in language translation feature to facilitate communication across international offices, and they continue to work to increase the quality of content, as well as the adoption rate among agents.

Moving forward, a connector has also been designed by Sociabble to allow agents to publish pieces of content directly onto their own website or blog. The content is perfectly integrated and edited into the web page.

Generali's tips for similar companies

When it comes to advice for global insurance providers looking to create or improve an online Digital Visibility program for agents, Michele Poretti, Generali Group Head of Distribution Experience, has the following to say:

"Include regions and countries from day one, to start together in defining the roadmap. And have both a content provider and a digital platform that they can use and leverage across markets.

So on one side, try to listen to the differences of the local markets, but on the other, also try to use a standard approach to accelerate the implementation."
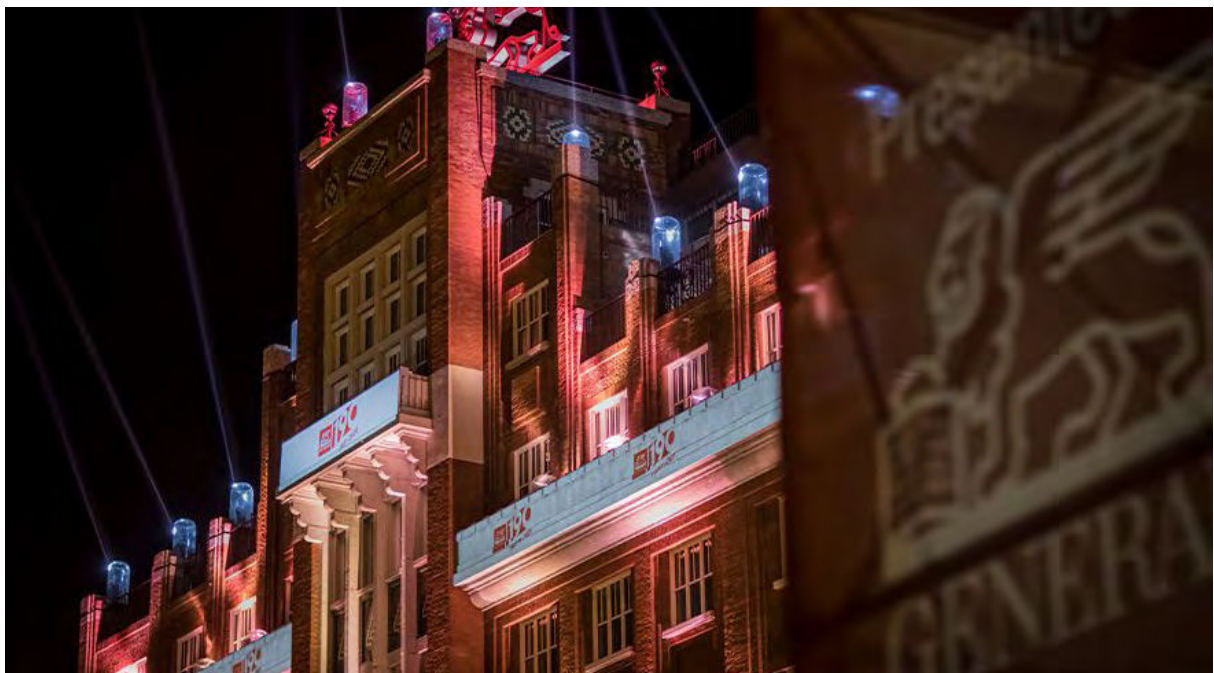
Discover all our case studies

www.sociabble.com