NYL.com Agent pages

Agent pages makes it easy for prospective clients to find you on the Internet. Fortunately, if you want to participate in this new program, that’s also easy. The following document is a quick overview of what Agent pages can do, how to set them up, and some frequently asked questions.

As an Agent with a @ft.newyorklife.com email address, you have a free web page on newyorklife.com with a personalized URL based on your title and your directory ID. For example, if your directory ID is “jdoe,” then your Agent page URL is http://www.newyorklife.com/agent/jdoe.

What can my Agent page do for me?

- Generate leads by directing prospects to your page to fill out a ‘Let’s Talk’ form.
  - As long as the consumer has viewed your page first, you will receive the lead even if the consumer fills out the ‘Let’s Talk’ or ‘Consult an Agent’ form on another page.
- Increase your visibility in search results.
  - Search engines, like Google and Bing, favor content rich pages with multimedia links.
- Drive traffic to your social media pages.
- Educate prospects about our products and services.
- Connect with prospecting customers.
  - Your pages can feature specialized pre-approved content, ads, and videos that are available for you to select through Agency Portal. The updates appear immediately on the live web site.
As a New York Life Agent, I don’t believe in a “one-size-fits-all” approach. Instead, I’ll work with you to create a strategy that’s based on your individual needs and objectives.

So how do we get started?

**Let’s talk**: That’s how it all begins—with a simple conversation. Let’s get together at your convenience, maybe over coffee, and see if working together makes sense for us both.

**Be open and honest**: I’ll try my best to anticipate your needs, but will never assume anything. That’s why it’s so important to be as candid as possible when discussing your goals.

**Getting started**

They say life doesn’t give you anything you can’t handle. But that doesn’t mean you have to handle it alone. These days, it’s more important than ever to make sure you have a financial professional by your side. Let’s get started – there’s no better time than now.

**Protect your family**

There’s nothing more exciting than new beginnings. So now that you have a family of your own, it’s important to think about all your goals and objectives for the future, and to make sure you have a plan in place to start you on your way. Want to buy a new home or just make sure all their day-to-day needs will be met? Congratulations: You’re off to a great start.
How to do I set up/change my Agent page?

1. Log into Agency Portal.
2. Click on the Settings link in the upper-left-hand side of the web page.
3. You will see the ‘My Profile’ box with a Business Info and Content tab. The **Business Info** tab contains “business card” information, populated from Marketer and updated automatically if changes are made: your name, licenses, email address, office phone number, and office location. Social media links, approved by SMRU, are automatically included. To change your contact information, like your cell phone number, continue to request updates through your GO Admin.

In addition, you may edit the following fields directly:
- Visible/hidden toggle box to turn web page on/off, upload a photo

This list spells out what you can and cannot change in the graphic above (numbers on graphic correspond with numbers below):

1. Name (not editable)
2. Licenses (not editable)
3. Email address (not editable)
4. Phone number(s) (editable through your GO Admin)
5. Office address (not editable)
6. Emerald web address (Populated automatically)
7. SMRU approved social media links (Facebook, Twitter and LinkedIn) (Refreshed automatically every few weeks with no further action required by you)
8. Save
9. Photo (390x250 pixels) (Uploaded by you by clicking the ‘add photo’ link)
10. Directions and guidelines for uploading a photo. Refer to second screen shot for details.
11. Visible/Hidden toggle to activate/deactivate your web page (your page is visible by default)
12. Link to your live Agent page on newyorklife.com. Click here to view content linked to in the video and ad space drop down menus. If you have trouble viewing the changes, see page 6’s section How to clear your cache.
13. Tips and instructions for adding your professional photo appears when mouse is hovered over “photo help”. See second screen shot below.

The **Content** tab contains drop-down menus with content to personalize your page. (Note: All these items have been SMRU-approved.)

- The main section of your web page contains:
  1. A section of body content
  2. Two optional content segments, which give you the choice of focusing on specific target markets and products

- The right side of the web page contains a ‘Let’s talk’ form that routes leads directly to you. Once a user visits your page, you will receive the lead regardless of the page where the form is filled out as long as they do not visit another Agent’s page. The leads are sent by email through the standard lead distribution process.

- The right side of the web page has space for an optional video and ad that will give consumers more information about a given topic.
This list spells out what you can and cannot change in the page above (numbers on graphic correspond with numbers below):

1. Content body (select from drop down menu in Agency Portal)
2. Content segments 1 and 2 (select from drop down menu in Agency Portal)
3. Video (select from drop down menu in Agency Portal)
4. ‘Let’s Talk’ contact form (auto-selected from drop down menu in Agency Portal)
5. Ad space (selected from drop down menu in Agency Portal)
6. Save
7. Link to your live Agent page on newyorklife.com. Click here to view content linked to in the video and ad space drop down menus. If you have trouble viewing the changes, see page 6’s section What if I can’t see the updates on my live page?.
The **Marketing tools** tab provides you with a tool to inform and produce leads that will be routed directly to you.

- Browse [www.newyorklife.com](http://www.newyorklife.com) and choose the pages you’d like to include in your marketing materials.
- Copy and paste the web address into the Lead Routing URL Generator to the right of the URL field.
- Click the purple arrow to the right of the URL field to generate a unique web address in the URL output field. You will receive the prospecting leads that result from filling out a form.

![Lead Routing URL Generator](image)

**What if I can’t see the updates on my live page?**

To see the updates on your Agent page, you may have to clear your cache. See below for instructions about how to do this in Internet Explorer and Google Chrome.

- **Internet Explorer:**
  1. Select **Tools** button in the upper right hand corner of your browser window.
  2. Choose Safety and click on **Delete browsing history**.
  3. Verify that Temporary Internet files, Cookies, and History are selected.
  4. Click Delete.
- **Google Chrome:**
  1. Click on the **Customize and control Google Chrome** button in the upper right hand corner of your browser window.
  2. Select **History**.
  3. Click on **Clear browsing data**.
  4. From the drop down menu, choose Obliterate the following items from the beginning of time.
  5. Verify that Browsing history, Download history, Cookies and other site and plug-in data, and Cached images and files are selected.
  6. Click on **Clear browsing data**.
Frequently asked questions

1. What information is automatically generated for my page?
   Name, office phone number, e-mail address, licenses, Emerald URL, and office location

2. What sections of my Agent page can I update myself through Agency Portal?
   You can choose the body content, up to two content segments, add a video, upload a professional photo, and select an ad (all these items are already SMRU-approved).

3. How do I update my Marketer-generated information?
   Contact your local General Office administrator, just as you always have.

4. What are the specifications for the photo?
   Photos should be professional-looking (at least 390x250 pixels). If you had a picture taken at Council, you can download it from your General Office’s Team Site.

5. How long does it take for my page to be updated?
   The saved changes appear immediately on the live website. To view the updates, you may need to clear your browser’s cache. See page six of this document for detailed directions.

6. How does someone find my Agent page?
   - People can use a search engine like Google or Bing
   - Go to newyorklife.com’s home page and use the search function or the “Find an Agent” tool on the “Contact us” page
   - Type the URL into their browser.

7. Can I deactivate my Agent page?
   Yes, there is a toggle box in the Business Info tab of the Agency Portal user interface where you can choose the option “Hidden” to hide your page.

8. What does my page look like if I don’t make any changes in Agency Portal?
   The Marketer-generated business card information will appear, and there will be a default body copy (already SMRU-approved) and contact form for Agents. If you do not update your page through Agency Portal, it will not include your photo, content segments, video links, or ad.

9. Who do I contact if I have questions about my Agent page?
   For any questions about functionality, content, or troubleshooting, send an email to the nylwebcontent@newyorklife.com.

10. Are there any enhancements to Agent pages planned for the near future?
    Yes! We’re always looking to improve. Here are some features to be rolled out soon:

    - **Agent pinning** – We’ll provide customers with the ability to select and deselect their preferred Agent. If a customer is pinned to an Agent, the connection will be transparent and follow the user throughout their navigation in newyorklife.com.

    - **Customized content** – We’ll add more SMRU-approved content, videos, ads, and articles that you can use to customize your page.

11. How do my social media URLs show up on my Agent page?
    There are active links to your SMRU approved Facebook Business pages, LinkedIn profiles, and Twitter profiles on your Agent page. Currently, the links are manually updated every few weeks, but we have prioritized the automation of this process on our roadmap so that we can provide more frequent updates.