The Agency Guide

to Getting Started with Social Media

Trusted Choice
INDEPENDENT INSURANCE AGENTS

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What We'll Cover

This guide will give your agency information and tips on how to best leverage social media. We'll go over the top channels, how to find and reach your ideal audience, and what types of content are ideal for each platform.

The tips in this guide are meant to be suggestions and high-level guidelines to help you find your intended audience. We encourage you to experiment with different content to see what works best for your audience.

Nowadays you can reach your ideal customer on any number of social media platforms. The lines between personal and business has expanded and blurred with the increased usage of social media. This means you can find business owners on Instagram and those interested in home insurance on LinkedIn.

Don't forget, you don't have to be an expert designer to build a social media community. Focus on sharing high quality information that will add value to your followers.

Platform Recommedations

	Facebook	Instagram	X/Twitter	LinkedIn
Overview	Facebook has the largest reach among all social media channels. Users report using Facebook primarily to connect with friends and family so your content should be informative and friendly. Excellent audience targeting is available through Facebook.	Instagram has the most usage among younger customers. Unlike most other social platforms, Instagram is highly visual and relies on entertaining images and short videos, Reels.	X is often a one stop shop for news of all kinds: politics, pop culture, and niche interest groups. Most content trends and best practices apply here but timing and relevancy will be extra important.	LinkedIn is a great place to reach business owners and professionals who influence insurance decisions at their company. You may choose to share from your personal profile, company page, or in relevant industry groups.
Demographics	18-24 18.6% 25-34 24.2% 35-44 14.2% 55-64 11.7% 65+ 12.3%	18-24 26.5% 25-34 28.3% 35-44 19.4% 45-54 12.2% 55-64 7.8% 65+ 5.8%	28-24 27.63% 25-34 29.95% 35-44 18.02% 45-54 11.6% 65+ 6%	18-34 24.5% 25-34 50.6% 35-54 21.2% 55+ 3.8%
Content Types	✓ Single photos ✓ Multi-photo albums ✓ Video ✓ Stories ✓ Links	✓ In-feed photos ✓ Multi-photo ✓ Stories ✓ Videos/Reels	✓ Tweets/Text posts ✓ Image posts ✓ Video Posts ✓ Reposts ✓ Stories	✓ Text posts ✓ Images ✓ Video

Audiences

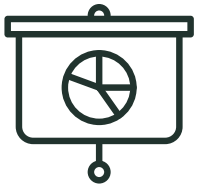
Before you begin creating content for your agency's social media, you will need to define your audience(s). It is important to know who you are trying to reach and what you want to tell them. The four main audiences Trusted Choice highlights are: Millennials, Established Families, Baby Boomers, and Small Business Owners. Your agency may choose to get even more specific based on your location and business lines. Some examples of this might include **wineries in Virginia** or **motorcycle owners in Dallas**.

Build your audience profiles based on online research, customer surveys, and your business goals. Two examples have been provided below.

Audience Name:	**Established Families**
Profile:	**Age: 30-50 HHI: $125k-$500k 1-2 parents, 1+ children**
Insurance Needs:	Established families want to protect their family and these needs change over time. They may be buying their first home or upgrading their home. They may have multiple cars, teen drivers, a vacation home, or recreational vehicles (boats, RV, etc.)
Desired Perception:	"A Trusted Choice Independent Insurance Agent understands my growing family's needs. They are insurance experts who live in my community and can recommend the best insurance options for my family as my needs evolve."
Product Lines:	**Home, auto, life, recreational vehicle, renter's, condo, vacation home, umbrella**

Audience Name:	**Small Business Owners**
Profile:	**Age: 35-65 HHI: $150k-$1M**
Insurance Needs:	Small Business Owners need a trusted advisor to help them navigate their insurance needs as they grow. They want to protect all parts of their business – physical location, employees, online/cyber store, business vehicles, and general liability.
Desired Perception:	"A Trusted Choice Independent Insurance Agent understands my growing business. They are insurance experts who live in my community and can recommend the best insurance options for the current state of my business and anticipate future needs."
Product Lines:	**Small business, cyber, business liability, business interruption, errors & omission, worker's compensation, business umbrella, commercial property, commercial vehicle**

Getting Started on Each Platform



1. Create your profiles

Once you have defined your audience and chosen your audiences, set up your social accounts as business profiles. This will include:

- A profile picture (recommended: use your company logo and be consistent across channels)
- A header photo (can be changed to match seasonality or showcase employees)
- Your agency's contact information
- Link to your website
- Your location
- A short bio including your value proposition and what customers can expect to see on your social channels. Resist the urge to write your agency's history and keep the focus on the value you provide.

2. Outline your content calendar

One of the hardest things about social media is deciding what to post. Start by creating a 12-month calendar with themes you can share each month. Some might be obvious seasonal trends like winter snow safety or summer road trip auto tips.

However, don't forget any big community service initiatives, events, or tradeshows. To help get you started, there is a topics calendar at the end of this guide.

>>> Creating Content Tip! If you're unable to create a content calendar we have an option for you! Trusted Choice creates a monthly Social Media Calendar to give you options and inspiration on what to post.

3. Improve your posting

- **Consistency is key!** If you are just getting started, stick to once a week and post more often as you get more comfortable.
- **Don't sacrifice quality for quantity.** It is better to post less often if you don't have something valuable to share.
- **Look for inspiration.** Research your competitors and brands you love outside the industry to see what kind of content they are sharing. Can you borrow some of their strategies? Plus, share photos from customers and employees – with permission and photo credit!
- **Share articles from trusted sources.** If you do not have an established blog, put together a list of trusted sites like carrier partners, TrustedChoice.com, news sites, or even local sites to help find articles to share.
- **Test new things.** Do not be afraid to try new things on your channels. Switch up your posting times, introduce a video series, and look at your analytics to see what content is earning the most engagement. Do not be afraid to make mistakes!

>>> Consistency in Posting Tip! Trusted Choice has partnered with **Social Jazz** — a social media automation tool to help you automate your posting. Click here to learn more.

Best Strategy Practices

The Domination of Vertical **Video**

Videos have been a growing format on social media platforms in recent years. With the growing popularity of stories, TikTok and Instagram Reels, all platforms have made vertical videos an expected part of any content strategy.

Vertical videos are the most relevant content for a social platform's algorithms. Out of the four main social platforms we have mentioned, X/Twitter is the only one that doesn't have a designated spot for viewing only vertical videos. X/Twitter does integrate them into their main feed.

Why are so many social platforms prioritizing videos in this way? Audiences have proven that they prefer short-form video, and engaging content that relates to them. It's easier to feel connected and understood looking at another human face, rather than a general graphic or text post. This is why it's so important to be human on social media!

Edit your content for jargon, too many industry-specific terms, and acronyms the general public would not know. Help your audience understand insurance as if you were speaking to them face to face for the first time. If you are specifically serving a smaller or specific market, don't be afraid to reference the community in your posts. Shout out a local business or reference a beloved sports team. These are all things that can come across as more authentic in videos.

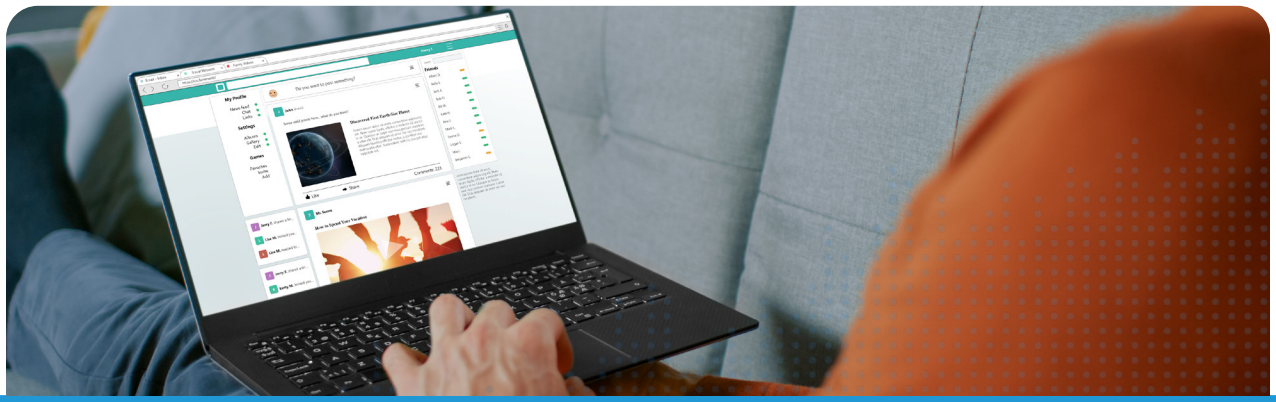
>>> **Tip!** Using trending/popular audio is important as it gives your video a higher chance of being picked up by the algorithm and pushed to new audiences!

How Should You **Link?**

You can utilize links on every social platform – but how you do this is different per platform. For instance, on Facebook, LinkedIn, and X/Twitter you can share a link directly on your feed with either directly posting a link, adding it to a text post, graphic, or video, which can increase your reach and engagement by making the link being a call to action.

On Instagram links are different. Links are "live" or clickable only in certain places, Instagram Stories, and in the bio of the profile. This means if you add a link to the caption of either a post or reel your audience will not be able to click the link and be taken to the website. This is because Instagram wants and prioritizes users to stay in the app and engage with content that was developed specifically for it.

>>> **Tip!** A call to action (CTA) is a phrase, button, or ask that prompts your audience to take a specific action. Example: "Learn More"



Best Strategy Practices

You Should Still Use **Hashtags**

Hashtags are used on every platform and are considered a good way to help find and engage in your desired audience. Remember, hashtags are key words about what you're posting. It's important to pick ones that are effective, and that means more than just hashtagging anything and everything to do with your post that you can think of in five minutes or less.

While hashtags can be used to find who are interested in the same things, they can be used to push your services, are a great way to stay connected to popular trends, and news. Every social platform has a robust algorithm that utilizes hashtags. This means hashtags are a big asset in your overall social strategy. It's important to use ones that are relevant to your company, and not just to use them to check a box. While the number of hashtags can change from platform to platform a good beginning number is to use three to five hashtags per post.

>>> **Tip!** Always make sure your accounts are open and public! Otherwise, your hashtags will never reach new audiences.

Finding the Right Hashtags for Your Business

A quick way to see which hashtags might work for your business is to take a look at what similar businesses and competitors are using. This way you can see which hashtags could be working for them, and which ones you might not want to use.

Once you have a hashtag or a key word you can easily find other related hashtags that might further align with your post(s). An example of this would be if you typed "#insurance" into the search bar of Instagram. In Instagram, and for majority of social media platforms, the hashtags you see first with "#insurance" will be the ones that have the highest number of uses. Using hashtags with high numbers of uses, 1 million plus, have positives and negatives. A positive of using a hashtag with over a million uses is that the hashtag could have lots of followers. A negative can be that that hashtag has so many uses that it can be hard for an audience to look at every knew post tagged, aka your post may be "lost" in the sheer numbers.

This is why tracking and analyzing which hashtags work for you is so important. The hashtags that might work for your posts on one platform might not work for you on another. Instagram and LinkedIn have two difference audiences, and while the same person might use both apps, that person is using each app for different reasons.

Best Strategy Practices

Following **Trends**

Putting your own spin on popular trends is a great way to increase your audience engagement and expand your audience. Follow influencers in your field on LinkedIn or Instagram, keep up with trending topics on X/Twitter, and scroll through trending audio on Instagram. What are these people talking about? Can you contribute to the topic in your own way? Can you use trending audio or prompt to create a fun video about an insurance tip?

Focus on **Content Value** over Production Value

You don't have to look like you spend thousands of dollars on your content. With the fast pivot to online sales and communication in 2020, consumers are strongly focused on one question, does this information tell me what I need to know?

One of the reasons why content value is so far-reaching is because consumers crave "snackable" content. "Snackable" content is a term used to describe short marketing content. With the rise of videos across many platforms, users expect short, concise content on social media. Keeping your content short with simple language and memorable information is highly valuable in the land of social media.

So don't let visual perfection stand in your way from sharing your knowledge! Record videos on your phone, leverage free creative templates online, or leverage pre-made content from content to share on the Trusted Choice member resource site.

Annual Content Themes

Q1

January

New Year's Day
Martin Luther King Day

New Habits
Winter Safety

Sample Insurance Topics:
Winter Maintenance & Safety
(home & car)

Reevaluating needs for the year
(Business, Home & Car)

Healthy habits
(Home, Life, & Business)

Recreational Vehicle
(snowmobile)

Travel (Ski or Beach)
(Vacation home & Auto)

February

Chinese New Year
Valentine's Day
President's Day
Black History Month
Heart Health Month

Jewelry/Personal Property
Winter Safety

Sample Insurance Topics:
Winter Maintenance & Safety
(home & car)

Protecting Valuables
(Jewelry & Personal Property)

Heart Health
(Home & Life)

Recreational Vehicle
(Snowmobile)

Travel
(Ski or Beach)
(Vacation home & Auto)

March

St. Patrick's Day
National Pi Day (3/14)

First Day of Spring
Start of Tornado season
Spring Cleaning

Sample Insurance Topics:
Winter and Early Spring
Maintenance (Home & Car)

Tornado/Disaster
(Home & Car

Q2

April

Passover
Easter
Distracted Driving Month

Rainstorm
Flooding
Spring Cleaning

Sample Insurance Topics:
Spring maintenance & safety
(Home & Car)

Distracted Driving
(Car)

Rainstorm/Flooding
(Home & Car)

May

Mother's Day
Memorial Day
Graduation Season

Rainstorm & Flooding
Lawn/ Back Yard Maintenance

Sample Insurance Topics:
Spring Cleaning/Yard Maintenance
(Home & Car)

Recreational Vehicle
(RV & Boat)

Backyard Pool & Grilling
(Home)

New Grads
(Renter's & Auto)

June

First Day of Summer
Father's Day
Juneteeth

Rainstorm & Flooding
Summer Home Maintenance
Employee Wellness Month

Sample Insurance Topics:
Summer Home maintenance
& safety (Home & Car)

Backyard Pool & Grilling
(Home)

Summer Travel
(Vacation Home, RV, Boat)

Employee Health
(Small Business)

Annual Content Themes

Q3

July

Independence Day

Rainstorm
Extreme Heat

Sample Insurance Topics:
4th of July Travel
(Home, Car, Vacation Home, RV, Boat)

Backyard Pool & Grilling
(Home)

August

School back in session

Hurricane
Rainstorm
Extreme Heat

Sample Insurance Topics:
Home Maintenance & Safety
(Home & Car)

Backyard Pool & Grilling
(Home)

Summer Travel
(Vacation Home, RV, Boat)

Hurricane & Natural Disaster
(Home & Car)

Back to "work"
(Small Business)

September

Labor Day
First Day of Fall

Hurricane
Rainstorm

Sample Insurance Topics:
Fall Maintenance
(Home & Car)

Hurricane & Natural Disaster
(Home & Car)

Back to "work"
(Small Business)

Q4

October

Halloween

Hurricane
Winter Safety
Cyber Security Month
Small Business Month

Sample Insurance Topics:
Fall Home Maintenance & Safety (Home & Car)

Hurricane & Natural Disaster
(Home & Car)

Fire Pit and Home Heating
(Home)

Fall Foliage Travel
(Car, RV, Vacation Home)

Cyber Security Tips
(Home & Business)

November

Thanksgiving
Dia de los Muertos
Giving Tuesday
Small Business Saturday

Hurricane
Winter Safety
Snowstorm (Northern States)

Sample Insurance Topics:
Home Maintenance & Safety
(home & car)

Fire Pit and Home heating
(Home)

Kitchen & Travel Safety/Thanksgiving
(Home & Car)

Giving Tuesday/Small Business Saturday (Small Business)

December

Hanukkah, Christmas, Kwanzaa
First Day of Winter
New Year's Eve

Winter Safety
Snowstorm
Porch Pirates
Chimney Maintenance
Engagement Season

Sample Insurance Topics:
Winter Prep/Freezes
(Home & Car)

Snowstorm Disaster (Home & Auto)

Chimney & Outdoor Heating (Home)

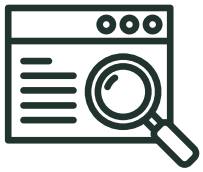
Kitchen, Tree, Ordering Online & Travel Safety/Holidays
(Home, Car, Personal Property, Cyber)

Engagements
(Jewelry & Personal Property)

Content Sizes

Facebook	Instagram	X/Twitter	LinkedIn
Cover image: 820 x 312 (min 400 x 150)	**Profile image:** 110 x 110	**Header image:** 1500 x 500 Max: 5 MB	**Company cover:** 1536 x 768 Max: 4 MB
Profile image: ≥180 x 180	**Shared photos:** 1080 x 1080	**Profile image:** 400 x 400 Max: 2 MB	**Company logo:** 300 x 300 Max: 4 MB
Shared post image: 1200 x 630	**Stories resolution:** 1080 x 1920 (min 600 x 1067) Max: 4 GB	**In-stream image:** 1024 x 512 Max: 5 MB	**Company page banner:** 646 x 220 Max: 2 MB
Event cover: 1920 x 1080	**Promoted image:** 1080 x 1080, 1080 x 566	**Promoted image:** 1200 x 600 Max: 3 MB	**Shared image:** 350 pixels wide
Promoted image: 1200 x 1200	**Reel:** 1080 X 1090		**Sponsored content image:** 1200 x 627
Facebook story image: 1080 x 1920			
Facebook story ad: 1080 x 1920			

Resources



Scheduling

Best for Instagram

Planoly: Plan your Instagram grid and stories in Planoly. You can also use their free LinkIt tool to link to multiple website pages in your bio. Free for up to 30 planned posts per month.

Later: Best used as an Instagram post and stories planner but can be used for Twitter, Facebook, and LinkedIn too. You can use their free Linkin.bio tool to link to multiple website pages in your bio. Free for up to 30 scheduled posts per social channel.

Best for X/Twitter, Facebook, Instagram, and LinkedIn

Social Jazz: Makes it easy for you to automate your social media posting with Trusted Choice Content to Share social graphics. With Facebook, Instagram, X/Twitter, and LinkedIn are all supported, and for only $15 per month.

Loomly: A tool for you to schedule social media posting with an ability to track your analytics for a base price of $32 per month.

Hootsuite: For a more advanced social scheduling, listening, and content tool, check out Hootsuite. Get started for free or upgrade starting at $29/month.

Creating Content

Canva: This tool offers easy to use templates for all social channels. There are also templates for videos and printed materials. Free or $13/mo for tons of extra stock photos and graphics.

Stock Photos: Find free stock photos to use on Pexels, Pixabay, and Unsplash.

Movavi: An easy to use video editing tool. Get started with basic features for free.

Images sizes: This is the source for the image sizes listed above.

Linktr.ee: Share multiple links from one link in your Instagram bio and anywhere else you want. Linktr.ee is text based and does not require the visual element of Planoly or Later. Get started for free or upgrade to custom branding and analytics for $6/month.

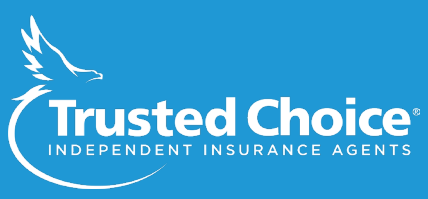
Latest Trends

Later: Stay up to date on the latest social trends organized by channel.

Social Media Examiner: Deep dive in the latest information on analyzing your social data and getting started with paid ads on each channel.

Social Media Today: Find articles on the latest content, platform, and CMO outlooks on Social Media Today.

Content Marketing Institute: CMI can help you with content related to more than just social media. Find templates, how-to's, and case studies.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