

# THE AGENCY GUIDE

to Getting Started  
with Social Media

2023



# What We'll Cover

This guide will help your help your agency decide how to best leverage social media in 2023. We'll take a look at the top channels, how to find and reach your ideal audience, and what types of content can work best for you.

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

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.

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# Channel Recommendations

	Facebook	Instagram	Twitter	LinkedIn
Overview	Facebook has the largest reach among all social media channels. Users reporting using Facebook primarily to connect with friends and family so your content should be informative but informal 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.	Twitter 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 (% of Americans using the platform)	46% of ages 65+  75% of ages 18 to 45 use Facebook. Usage among 20-30 and 30+ is similar.  While teens use Facebook less than adults, Facebook still reaches 113.3 million teens compared to 52.9 million on Instagram.	75% of ages 18-24  57% of ages 25-29  47% of ages 30-49  23% of ages 50-6	44% of ages 18 - 24  80% of people under 50 globally  Twitter skews slightly male: 62%  Most US Twitter users live in cities.	27% ages 26-35  34% ages 36-45  37% ages 46-55  29% ages 56+  Urban: 30% Suburban: 27% Rural: 13%
Recommended Audiences	<b>Focus: Personal Lines</b>  Millennials and adult Gen Z customers reaching life milestones like growing a career, renting a first apartment, buying a first home, or starting a family.  Baby boomers transitioning to retirement. They may be downsizing or relocating, enjoying grandchildren, or picking up new hobbies (travel, recreational vehicles, etc.).	<b>Focus: Personal Lines</b>  Millennials and adult Gen Z customers reaching life milestones like growing a career, renting a first apartment, buying a first home, or starting a family.  Older Millennials and Gen X customers with more established families, growing careers, and/or small businesses.	<b>Focus: Personal &amp; Business Lines</b>  Millennials and adult Gen Z customers reaching life milestones like growing a career, renting a first apartment, buying a first home, or starting a family.  Using the right hashtags and finding the right people, you may be able to target small business owners.	<b>Focus: Business Lines</b>  Millennials and Gen X small business owners any stage of business growth:  -Just starting.  -Expanding locations, products, sales, or number of employees.  -Employee growth and retention.
Content Types	Single photos  Multi photo albums  Video  Stories  Link to websites or blogs	In-feed photos  IGTV series  Stories  Reels	Text Tweets (links optional)  Image Tweets  Video Tweets  Retweets  Stories	Text (links optional)  Images  Video  Stories  LinkedIn company page  Industry groups
Posting Schedule	2-3 posts per week	2-3 posts per week	5-7 times per week	2-3 times per week

# Audiences

Before you begin creating content for 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 national brand focuses on four main audiences: Millennials, Established Families, Baby Boomers, and Small Business Owners. Your agency main choose to get even more specific based on your location and business lines. Some examples include [wineries in Virginia](#) or [motorcycle owners in Dallas](#).

Build your audience profiles based on online research, customers surveys, and your business goals. Two examples have been provided below plus a blank template to build your own.

<b>Audience Name:</b>	<b>Established Families</b>
<b>Profile:</b>	<b>Age: 30-50    HHI: \$125k-\$500k    1-2 parents, 1+ children</b>
<b>Insurance Needs:</b>	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.)
<b>Desired Perception:</b>	"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."
<b>Product Lines:</b>	Home, auto, life, recreational vehicle, renter's, condo, vacation home, umbrella

<b>Audience Name:</b>	<b>Small Business Owners</b>
<b>Profile:</b>	<b>Age: 35-65    HHI: \$150k-\$1M</b>
<b>Insurance Needs:</b>	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.
<b>Desired Perception:</b>	"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."
<b>Product Lines:</b>	Small business, cyber, business liability, business interruption, errors & omission, worker's compensation, business umbrella, commercial property, commercial vehicle



# Getting Started On Each Channel

## 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 tradeshow. To help get you started, there is a topics calendar at the end of this guide.

## 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!

# Best Strategy Practices: 2023

## Video rises to the top

Video has been a growing format on social media for years. However, Tik Tok and stories across platforms have made video an expected part of any content strategy. Consider sharing videos of you providing value insurance tips or text-based videos created with a template.

## Conversational marketing will change its tone.

Social media is social. We know it is important to write social copy as if you are talking to a friend.

However, in the past, conversational marketing tactics centered around promotions and making sales as quickly as possible. But in 2023, we have to make sure our social posts are focused on helping a customer solve a problem, learn how a product will help them, or break down an important but complex issue. Use this opportunity to highlight lesser known insurance risks and products or helpful safety tips.

## Consumers will crave snackable content.

“Snackable” content is a term used to describe very short marketing content. With the rise of Tik Tok videos, Snapchat, and stories across many platforms, users expect short, concise content on social media. Keep your content short with simple language and memorable information. Got something more complicated to share? Consider breaking it up in a series of posts or link to a blog where consumers can read more.

## Content value will beat production quality.

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?

Don't let visual perfection stand in your way from sharing your knowledge. Record video on your phone, leverage free creative templates online, or leverage pre-made content from content to share from Trusted Choice.

# Example Content Ideas by Channel

## Facebook

A fun seasonal post with text and imagery about having insurance for your seasonal activities and/or belongings. Experiment with other seasonal tips for home, car, and other lines.



An article with tips on how to prepare for hurricane season.

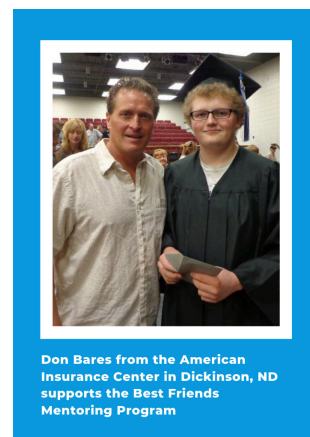
An article about adding teen drivers to an auto insurance policy.

Film a short video series with 30-second tips on what is and is not including in a basic home insurance policy.



Get specific in stories with tips on a lesser known insurance tip like insuring an engagement ring, recreational vehicle, or seasonal tips.

Create a video series (15 seconds to 1 minute) with insurance tips for new homeowners, downsizing empty nesters, or families with a recent grad.



Share photos from your agency's community involvement.

# Example Content Ideas by Channel

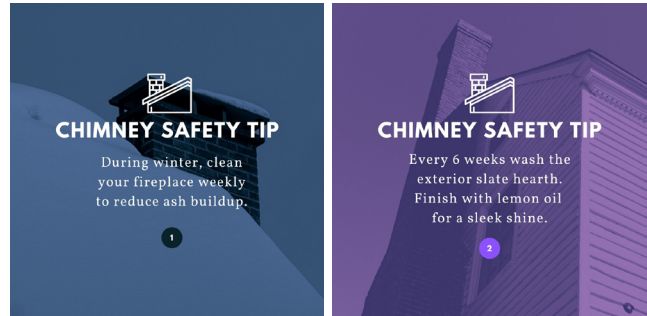
## Instagram

Create a Reel video series (15 seconds to 1 minute each) with insurance tips for new homeowners, recent grads, road trips, or newlyweds.

Share text-based carousel graphics with seasonal maintenance tips for home and car.

Share video-based stories of yourself explaining insurance tips for secondary product lines: engagement rings, personal property, recreational vehicles.

Don't be afraid to find some stock photos of product lines (home, car, etc.) and share your insurance tips in the caption.



[https://www.instagram.com/p/Clq\\_8-HDd1m/](https://www.instagram.com/p/Clq_8-HDd1m/)



# Example Content Ideas by Channel

## Twitter

Share seasonal articles about keeping up with home and car maintenance.



**Trusted Choice** @Trusted\_Choice · Dec 8, 2020

Don't let cold weather stop the fun. Take holiday traditions outdoors with these tips to transform your backyard into a cozy space for family fun.



Tips and Tricks for Celebrating the Holiday Season O...  
Did you know you can create a cozy deck/patio for holiday gatherings in just a few steps? If not, here's a...  
[trustedchoice.com](https://trustedchoice.com)

Repurpose your videos with tips for homeowners and road trips.



**Travelers** @Travelers · Dec 22, 2020

Never leave your stove or oven unattended while cooking. For more tips: [travl.rs/34sUBJR](https://twitter.com/Travelers).



Bake the world a better place.

Retweet articles from carrier partners or local blogs.

Share tips and trends related to the evolving work from home environment - employee engagement, cyber risks, time management.



**Trusted Choice** @Trusted\_Choice · Oct 13, 2020

What is multi factor authentication and how does it help you protect your digital assets? Here's a hint: It takes more than just a password to make the cut! #CybersecurityAwarenessMonth



Multi-factor Authentication: What It Is and Why You Should Use It  
Have you noticed that many websites and apps are starting to require more than just a password to login to your account? Do you get annoyed...  
[blog.central-insurance.com](https://blog.central-insurance.com)

Share photos from your agency's community involvement.



# Example Content Ideas by Channel

## LinkedIn

Share articles about employee engagement and retention.

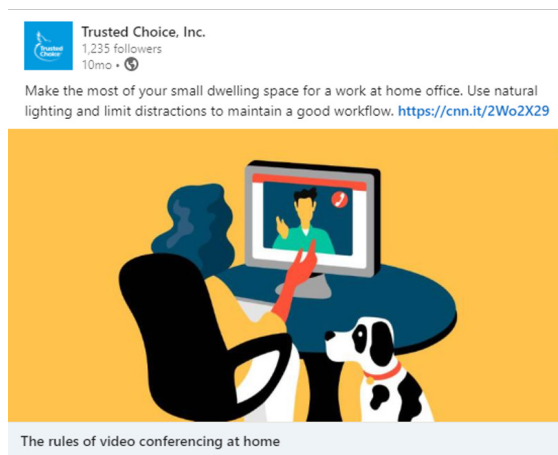
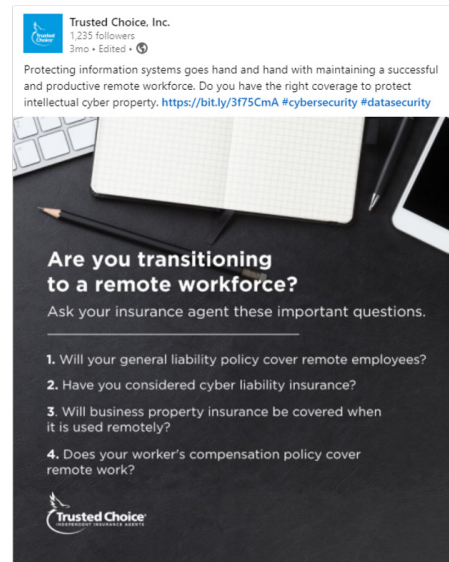
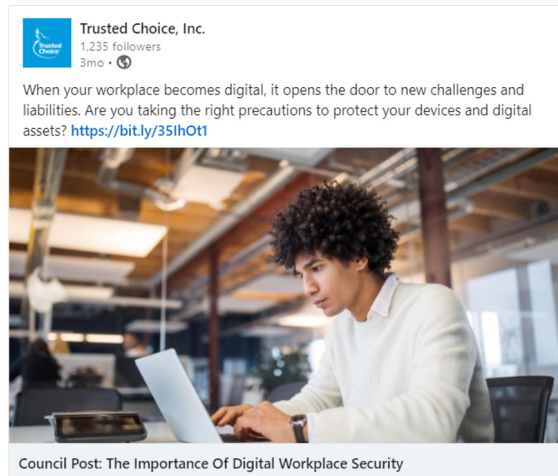
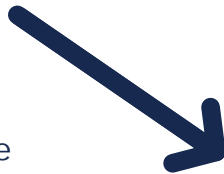
Share articles about cyber security and how any business can be at risk.

Write tips on liabilities the average business owner might forget about.

Join industry or small business groups and leave comments on interesting posts. Focus on adding value - don't sell too much!

Post photos of your agency's community involvement or team building days.

Share tips and trends related to the evolving work from home environment - employee engagement, cyber risks, time management.



# Annual Content Themes

	JANUARY	FEBRUARY	MARCH	
Q1	<p>New Year's Day Martin Luther King Day</p> <p>New Habits Winter Safety</p> <p><b>Sample Insurance Topics:</b> Winter Maintenance &amp; Safety (home &amp; car)</p> <p>Reevaluating needs for the year (Business, Home &amp; Car)</p> <p>Healthy habits (Home, Life, &amp; Business)</p> <p>Recreational Vehicle (snowmobile)</p> <p>Travel (Ski or Beach) (Vacation home &amp; Auto)</p>	<p>Chinese New Year Valentine's Day President's Day Black History Month Heart Health Month</p> <p>Jewelry/Personal Property Winter Safety</p> <p><b>Sample Insurance Topics:</b> Winter Maintenance &amp; Safety (home &amp; car)</p> <p>Protecting Valuables (Jewelry &amp; Personal Property)</p> <p>Heart Health (Home &amp; Life)</p> <p>Recreational Vehicle (Snowmobile)</p> <p>Travel (Ski or Beach) (Vacation home &amp; Auto)</p>	<p>St. Patrick's Day National Pi Day (3/14)</p> <p>First Day of Spring Start of Tornado season Spring Cleaning</p> <p><b>Sample Insurance Topics:</b> Winter and Early Spring Maintenance (Home &amp; Car)</p> <p>Tornado/Disaster (Home &amp; Car)</p>	
	Q2	<p>Passover Easter Distracted Driving Month</p> <p>Rainstorm Flooding Spring Cleaning</p> <p><b>Sample Insurance Topics:</b> Spring maintenance &amp; safety (Home &amp; Car)</p> <p>Distracted Driving (Car)</p> <p>Rainstorm/Flooding (Home &amp; Car)</p>	<p>Mother's Day Memorial Day Graduation Season</p> <p>Rainstorm &amp; Flooding Lawn/ Back Yard Maintenance</p> <p><b>Sample Insurance Topics:</b> Spring Cleaning/Yard Maintenance (Home &amp; Car)</p> <p>Recreational Vehicle (RV &amp; Boat)</p> <p>Backyard Pool &amp; Grilling (Home)</p> <p>New Grads (Renter's &amp; Auto)</p>	<p>First Day of Summer Father's Day Juneteeth</p> <p>Rainstorm &amp; Flooding Summer Home Maintenance Employee Wellness Month</p> <p><b>Sample Insurance Topics:</b> Summer Home maintenance &amp; safety (Home &amp; Car)</p> <p>Backyard Pool &amp; Grilling (Home)</p> <p>Summer Travel (Vacation Home, RV, Boat)</p> <p>Employee Health (Small Business)</p>

# Images Sizes



## Twitter

Header image: 1500 x 500 | max 5 MB

Profile image: 400 x 400 | max 2 MB

In-stream image: 1024 x 512 | max 5 MB

Promoted image: 1200 x 600 | max 3 MB



## LinkedIn

Company cover: 1536 x 768 | max 4 MB

Company logo: 300 x 300 | max 4 MB

Company page banner: 646 x 220 | max 2 MB

Shared image: 350 pixels wide

Sponsored content image: 1200 x 627



## Facebook

Cover image: 820 x 312 (min 400 x 150)

Profile image:  $\geq 180 \times 180$

Shared post image: 1200 x 630

Event cover: 1920 x 1080

Promoted image: 1200 x 1200

Facebook story image: 1080 x 1920

Facebook story ad: 1080 x 1920



## Instagram

Profile image: 110 x 110

Shared photos: 1080 x 1080

Stories resolution: 1080 x 1920 (min 600 x 1067) | max 4 GB

Promoted image: 1080 x 1080, 1080 x 566



# Annual Content Themes (cont.)

	JULY	AUGUST	SEPTEMBER
Q3	<p>Independence Day</p> <p>Rainstorm Extreme Heat</p> <p><b>Sample Insurance Topics:</b> 4th of July Travel (Home, Car, Vacation Home, RV, Boat)</p> <p>Backyard Pool &amp; Grilling (Home)</p>	<p>School back in session</p> <p>Hurricane Rainstorm Extreme Heat</p> <p><b>Sample Insurance Topics:</b> Home Maintenance &amp; Safety (Home &amp; Car)</p> <p>Backyard Pool &amp; Grilling (Home)</p> <p>Summer Travel (Vacation Home, RV, Boat)</p> <p>Hurricane &amp; Natural Disaster (Home &amp; Car)</p> <p>Back to "work" (Small Business)</p>	<p>Labor Day First Day of Fall</p> <p>Hurricane Rainstorm</p> <p><b>Sample Insurance Topics:</b> Fall Maintenance (Home &amp; Car)</p> <p>Hurricane &amp; Natural Disaster (Home &amp; Car)</p> <p>Back to "work" (Small Business)</p>
	OCTOBER	NOVEMBER	DECEMBER
	<p>Halloween</p> <p>Hurricane Winter Safety Cyber Security Month Small Business Month</p> <p><b>Sample Insurance Topics:</b> Fall Home Maintenance &amp; Safety (Home &amp; Car)</p> <p>Hurricane &amp; Natural Disaster (Home &amp; Car)</p> <p>Fire Pit and Home Heating (Home)</p> <p>Fall Foliage Travel (Car, RV, Vacation Home)</p> <p>Cyber Security Tips (Home &amp; Business)</p>	<p>Thanksgiving Dia de los Muertos Giving Tuesday Small Business Saturday</p> <p>Hurricane Winter Safety Snowstorm (Northern States)</p> <p><b>Sample Insurance Topics:</b> Home Maintenance &amp; Safety (home &amp; car)</p> <p>Fire Pit and Home heating (Home)</p> <p>Kitchen &amp; Travel Safety/Thanksgiving (Home &amp; Car)</p> <p>Giving Tuesday/Small Business Saturday (Small Business)</p>	<p>Hanukkah, Christmas, Kwanzaa First Day of Winter New Year's Eve</p> <p>Winter Safety Snowstorm Porch Pirates Chimney Maintenance Engagement Season</p> <p><b>Sample Insurance Topics:</b> Winter Prep/Freezes (Home &amp; Car)</p> <p>Snowstorm Disaster (Home &amp; Auto)</p> <p>Chimney &amp; Outdoor Heating (Home)</p> <p>Kitchen, Tree, Ordering Online &amp; Travel Safety/Holidays (Home, Car, Personal Property, Cyber)</p> <p>Engagements (Jewelry &amp; Personal Property)</p>

# 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:** Later is best used as an Instagram post and stories planner but can be used for Twitter, Facebook, and LinkedIn too. You can also 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 Twitter, Facebook, and LinkedIn

**Crowdfire:** This tool helps you easily schedule Twitter, Facebook, and LinkedIn posts plus help find related content to share. Connect three profiles for free or get more customized content curation ideas starting at \$7.49/mo.

**Buffer:** The tool makes it easy to schedule your social posts. Connect 3 channels and schedule 10 posts at a time for free or upgrade for \$15/mo.

**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.

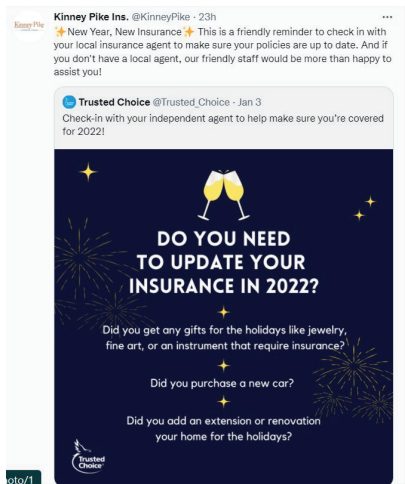
**Content Marketing Institute:** CMI can help you with content related to more than just social media. Find templates, how-to's, and case studies.

# Repost, Reuse, Repurpose Your Content



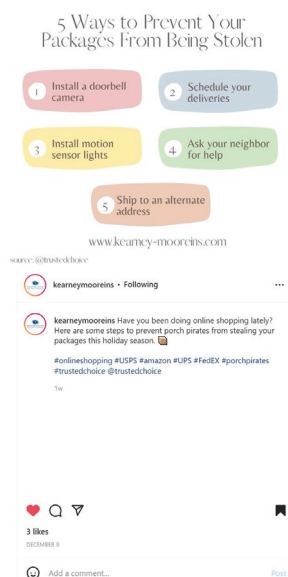
## Repost

Post images, graphics, and articles from other channels like Trusted Choice's Content to Share Library, carriers, and other trustworthy insurance sites. Give credit as needed!



## Reuse

Build onto what is already there with your own spin. Every post does not have to be brand new. Reshare posts from others with your own comments or posts from last year with updated information.



## Repurpose

Put your own spin on existing content. Redesign a graphic from the Trusted Choice Content to Share library, write a new article with supporting information from a carrier article, or update a post you designed last year. Give credit to your sources as needed!

# Social Media Trends: 2023

## 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 Facebook, keep up with trending topics on Twitter, and scroll through trending audio on Instagram and Tik Tok videos. What are these people talking about? Can you contribute to the topic in your own way? Can you use trending audio to create a fun video about an insurance tip?

## Be Human on Social

Don't forget to speak like a real person 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. Additionally, don't forget to add your personality to your posts. 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!

## Vertical Video

Video content has drastically increased across all platforms and it's a major way you can grow your audience and engagement! Audiences have proven that they not only like short-form video, engaging content that relates to them. You can utilize them by:



- ▶ Using trending (popular) audio. It's important to use trending audio so your videos have a higher chance of being picked up by the algorithm and pushed out to new audiences! Some of these audios are a mash up of popular songs and uploaded by individuals so they might have an uncommon title or someone's username instead of a title.
- ▶ Answer questions you get in your comments or see on other related pages. If you are on Tik Tok or Instagram reels you can answer the question with a video to directly link to the original question.
- ▶ Use popular editing styles. Many creators act out scenarios with customers by playing both the customer and the expert to help viewers see a real time point of view. Can you recreate yourself answering commonly asked questions to illustrate how you identify your customers' needs and help them find the right coverage?

Vertical video has made its way to almost every social channel. It is most popular on Tik Tok, and Instagram, and slowly making its way into Facebook. We know that creating videos can be daunting or time consuming if you haven't done them before but we're here to help! The next page includes a step-by-step process to help you create your first vertical video!

# Vertical Video (cont.)

## Step 1: What is your video about?

What's an insurance line you answer a lot of questions about? Let's use Home Insurance as an example. Here are three video topics you can use regarding Home Insurance:

- ▶ Top 3 Home Insurance Claims that I see as an Insurance Agent
- ▶ 4 Reasons Why You Should Update Your Home Insurance Policy
- ▶ Did You Know That This Isn't Covered in Your Home Insurance Policy?

## Step 2: Creating your video

- ▶ Use a platform like Canva where you can create videos using their stock videos and templates.
- ▶ Using stock video is a good way to have high resolution videos.
- ▶ If you are creating a video with multiple tips you can use a short video clip 3-5 seconds for each tip you share. It might look something like this:

- ▶ Title slide – 3 Seconds
- ▶ Tip 1 slide – 3-5 seconds
- ▶ Tip 2 slide – 3-5 seconds
- ▶ Tip 3 side – 3-5 seconds

So, you would then have a 12-second-long video with 4 different video clips. This helps your viewer stay engaged.

- ▶ When putting text over the video you want to make sure it is clear and legible.
- ▶ Remember to stay away from the edges of the videos when adding text. Often the edges are where the platforms have the engagement buttons placed.

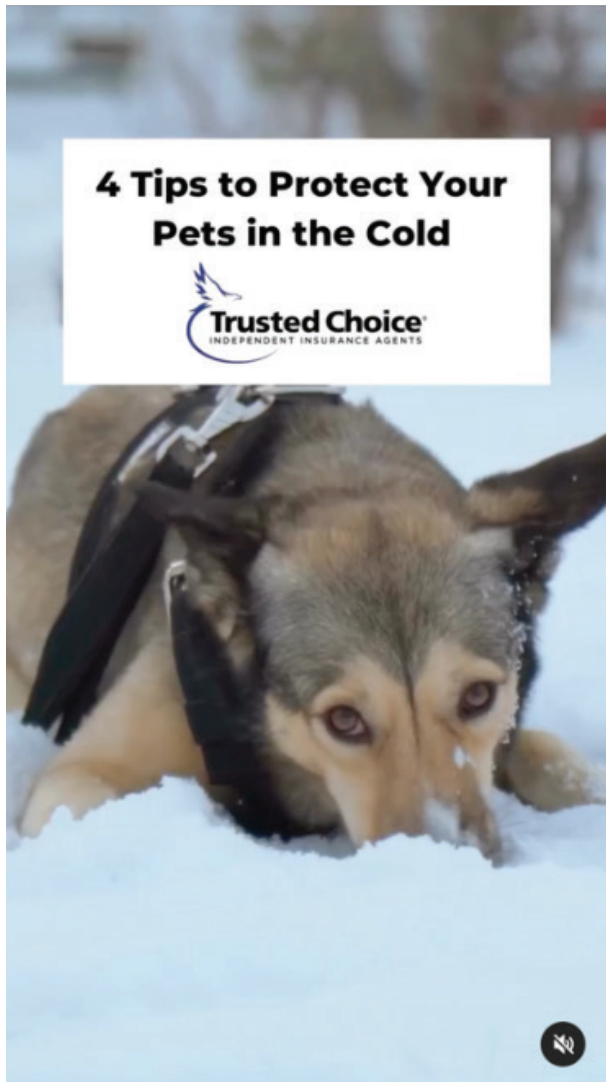
## Step 3: Download your video!

Now you can download your video and upload it to your social media.

Adding audio to your video is very important it helps keep your viewer engaged as well as telling the algorithm that new people might be interested in your video

The next page includes exaple videos you can use as inspiration when creating yours for your social media.

# Vertical Video (cont.)



Here is an example of a vertical video that was created using stock clips.



Here is an example of a vertical video using Indy! Note that Indy is doing simple, but clear movements.

