

Assurity®

# Social Media Playbook

10 best practices  
for you and your agents



# Is Social Media for you?

There's a line between professional and personal content on the web. When you choose to use social media as a professional tool, keep in mind you're branding yourself and representing your business. Before you dive in, ask yourself these 3 questions:

## 1. Do I like my job?

***"Yes, my job rocks!"***

If you enjoy coming to work every day, congratulations, social media is for you! When you enjoy what you do, you're more inclined to share your professional goals and achievements with your "friends" via social media – and in return, they're more likely to support you, what you do and engage with content you share.

***"No, hitting the snooze button is the best part of my day."***

If you don't enjoy what you do, who you work with, or the company you work for, then implementing social media into your professional life is not for you.

## 2. Am I willing to share my personal life with my clients?

***"Yes, I am open to sharing my personal side."***

If you prefer to portray yourself in a positive light at all times, including on the world wide web, congratulations – social media is for you! People will feed off of your positive vibes, motivating posts and support your professional endeavors.

***"Um...no. Work and play need to stay separated."***

If social media is an outlet for you to express your wild side and could potentially offend others, it's best that you keep your professional life separate from your personal life online. In other words – this guide is probably not for you.

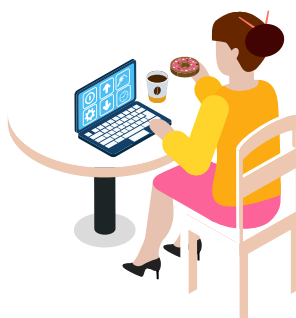
## 3. Is my social media presence appropriate for work?

***"Let's just say I wouldn't want my mom or grandma to see my newsfeed."***

When blending the boundaries of your personal and professional lives, it's important to keep your social content PG rated. You don't want to offend any of your past or potential clients. If you're not willing to do this, you may want to skip social media for work.

***"Yes! That's my reputation. Why would I post anything incriminating or offensive for the world to see?"***

If you answered "Yes" to all three questions, congrats – you're the perfect candidate for social media! Since you already have the basics down, are you ready to sell more insurance?



# 1

## Promote what you do

**You help your clients** with insurance products that protect their income and ensure their financial well-being. The more policies you sell, the more commissions you earn. Using your social media to share posts on insurance information, education, happy clients, and business successes can help you increase sales and referrals.

### Types of posts:

#### Service focused

How does the work you do help people? Share a timely, interesting or inspiring article and ask people to get in touch with you to talk about their goals or needs.

#### Customer focused

Share a positive experience you had with a client. (Get permission first). They may also tag you in a photo/post they share.

#### Professional focused

Share your professional achievements, work with community organizations, partnerships and charitable or social events.

### How do I promote insurance?

You don't promote insurance, you promote the need that it fills or the goal that it helps to achieve.

### Where can I find content?

- Check carriers' social pages and share relevant posts. Be sure to check the carrier's social media guidelines.
- Follow credible news and financial sources like CNN, Wall Street Journal, Kiplinger and Forbes.
- Set up a Google Alert to send to your email inbox the latest information on insurance, financial services, retirement, mortgages and more.



# 2

## Promote expertise

**Provide helpful information** to clients and prospects. It establishes your expertise and keeps your name and business top-of-mind. Your clients will likely ask questions rather than the carrier listed on their policy. If you want a client to be loyal, it's important to take the time to help answer their questions, and guide them to the right resources.

**Position yourself as a trusted advisor.**

### Tip:

If a client reaches out to you and asks a question about claims or another customer service issue, don't reply with "That's a question for the carrier." If you're unsure, at the very least, tell them you will find out and get back to them. And then get back to them.



# 3

## Build trust

**Expand your network** by reaching out and adding clients, old friends, coworkers, carrier partners and other business associates. The larger audience/network you have, the more potential clients you have. Clients want to put their trust in you, and believe that you're doing everything you can to help them. So be sure to go the extra mile and give 110% to create genuine relationships.

### Tip:

Observe and monitor your clients' personal pages for significant life events like a marriage, new job, new home or the birth of a child. Use these moments as checkpoints to build genuine connections and provide financial guidance, which could lead to future sales.



# 4

## Stay connected

**You get out what you put in** to your social media account. Post regularly, but don't oversell. We recommend 3 - 5 posts per week on Facebook or LinkedIn. Be sure to balance your professional posts with a few personal ones.

### Tips:

- ☑ **Be conversational.**  
Strive to be genuine and sincere. Engage people as you would in a face-to-face or phone conversation.
- ☑ **Be ready to respond.**  
Communication is a two-way street and is a crucial element in building relationships.
- ☑ **Thank people for feedback, comments and /or business.**  
You can even reply and ask if they would be willing to refer their friends and family.



# 5

## Deal with negative feedback effectively



### **Take complaints offline to discuss.**

If someone posts a negative comment, whether about a carrier, the insurance process or being denied coverage, reply with the following:

“I apologize about your recent experience. I’d like to try to help address your concerns. Would you prefer I contact you by phone or email?”

Taking the complaint offline allows you to gather more information and help resolve a difficult situation. It could even lead to additional business down the road. If the problem is related to Assurity’s customer service or a product, take a screen shot and link of any negative comments and forward to Assurity’s marketing department. We’ll coordinate with our team to address any issues as quickly as possible.

# 6

## Embrace the power of word-of-mouth

- ☑ Share positive client, prospect or other reviews.
- ☑ Take pictures of happy clients - with their permission of course!
- ☑ Ask clients for referrals to their friends and family
- ☑ Be professional
- ☑ Use a variety of posts
- ☑ Share your professional achievements, such as conferences you've attended, insurance designations and new carrier partners. BUT be wary of posting too often about insurance topics - these types of posts may turn off potential prospects.



# 7

## Avoid certain topics

### Do not post or share things containing:

- Politics
- Religion
- Sex
- Negativity
- Profanity, vulgar language or any content that violates the User Terms of Service on social media channels. Keep it clean and professional.
- Gambling
- Complaints about your job, carriers or colleagues

**Tip:** You might think typing in ALL CAPS creates urgency, but it can be perceived as yelling. Not cool. This doesn't show urgency and comes across as pushy.





# 8

## Grow your reputation



**Ask. Reach out to clients** through their LinkedIn or Facebook page and ask them about their experience.

**Example:** “I strive to educate my clients and provide quality products to fit their needs. How was your experience?”

**Share positive reviews** on your Facebook or LinkedIn pages with your friends/fans. Copy the URL to the positive reviews and share it. This links back to the review and provides credibility, while also making it easy for others to share their experiences as well. If you receive a handwritten note or thank you card, snap a photo, post it and don't forget to make a comment.

# 9

## Know your audience



### Friends vs. acquaintances

What you share and who you share it with should change based on the content. There are certain things you would share with your friends that you wouldn't want your mom or business acquaintances to see. Facebook has robust privacy settings that allow you to manage which audiences see your content. It's easy to do in a few clicks:

- ☑ Choose your audience at the bottom left of the status text box (next to the post button).
- ☑ To exclude certain people, customize your post by selecting "More Options" and select "Custom."
- ☑ You can then select specific people or groups to share content with, or selectively choose who you don't want to see it.



# 10

## Create good habits



- ☑ **Follow, follow back and interact.** What you get out of social media is determined by what you put into it. Follow industry-related accounts, such as carriers, business associates and trade publications or associations. Follow back relevant accounts that follow you. Respond to industry-related questions your friends ask or share.
- ☑ **Determine your voice and tone, and keep it consistent and appropriate.** Find out who your audience is and cater to what they engage with. Be sure to keep it professional, authentic and friendly.
- ☑ **Keep it short.** Facebook and LinkedIn are tools to interact with clients, business associates and friends. Shorter posts lead to more engagement and interaction. If you prefer longer form writing, consider starting a blog or publishing an article on LinkedIn.
- ☑ **Create consistent brand awareness.** There are a lot of trending videos, articles and photos that surface daily; however, it's important to stick to content that professionally represents you. This helps establish a consistent voice and message to your clients and ultimately creates trust.
- ☑ **Don't overshare.** There is enough spam and advertised posts on social media. Limit posts to an average of 3 - 5 per week. Only 1 or 2 should be directly selling/asking for business.
- ☑ **Be transparent.** Whether you're sharing an article about financial planning or a specific product, allow your followers to voice their own opinions. It helps build trust and credibility by not pressuring or being too aggressive. In turn, prospects will be more likely to engage with you. Avoid controversial topics that can offend clients and prospects.
- ☑ **Be proactive, not reactive.** If you see someone in your social network who posts about a recent life milestone and may be in need of insurance, be proactive and reach out. Keep it positive and helpful. Provide them with resources and a link to your webpage. The same goes for a complaint. Address their comment and offer to speak with them over the phone or in person.
- ☑ **Respond to both negative and positive feedback.** Your clients and prospects use social media to post about their lives, including their experiences with local businesses, both good and bad. While it may be tempting to hide or delete negative feedback, don't. Instead, respond to negative comments, address concerns and reach out to them. Nobody is perfect, but how you respond to clients and prospects can make you stand out.

# Social media recap

The best tactics for a successful social media performance are simple to follow and execute as long as you're consistent with the content you share and the frequency of your posts. Build your online reputation by providing valuable content, responding quickly to comments, and sharing the right blend of personal and professional information. By minding the do's and don'ts of using social media as a professional tool, your business is sure to grow.



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