

A dark blue background with a network of white lines connecting various icons. The icons include shopping carts, user profiles, musical notes, stars, and signal waves, creating a digital and interconnected theme.

INTRODUCTION

TO LINKEDIN AND
FACEBOOK FOR AGENTS



Social Media and Why It's Important

As of 2021, [82% of Americans](#) have at least one social media profile. It's no wonder that social platforms have become such an important channel for sales, marketing and recruiting. Social media lets you share many facets of your life — your interests, your ideas and pieces of information that would be useful to others. As a result, you build connections with others and are creating an online community that listens to you and follows your advice.

Here are some benefits of social media:

- **Awareness:** If people don't know about you and your business and offerings, they can't turn into your customers. Having a social presence boosts your visibility amongst your potential clients and downlines. Plus, it's free to create a profile on all of the important social networks, so it's a risk-free opportunity.
- **Establishing credibility:** Customers are increasingly savvier with the rise of social platforms and there's no indication that your clients are going anywhere else but online. Setting up social profiles and posting relevant and interesting content (and being consistent with it) will ensure you establish a positive impression, showing that your business is trustworthy, credible and approachable.
- **The best customer support experience:** Social media opens the conversation for instant interaction with a potential customer. Having the accessibility to speak with your audience in a public or private manner (i.e., comments or direct messages) allows for near-immediate connections and responses to questions, comments or concerns. Being easily accessible for your customers can help establish your rapport quickly, increasing your authenticity and credibility in your specific niche, and aids in your clients' understanding of an additional avenue in which to reach you.



Facebook is the largest social media platform, focusing on connecting users primarily via mobile for general sharing and engagement.

Numbers at a Glance

- 1.57 billion daily active users and 2.74 billion monthly
- 25% of Facebook users are ages 25-34 and 57% of their audience is male
- Users share 1 million links on Facebook every 20 minutes
- Reaches 60% of world's "social networking" population
- 63% of U.S. population over the age of 12 uses Facebook, and 52% of Americans 55 and older use Facebook
- On average, users spend 35 minutes per day using Facebook

Key Terms

- **Page "Like":** When a fan "likes" your page, anything you post or update will show up in their News Feed.
- **Engagement:** The number of likes, comments and shares you receive.
- **Timeline:** The stream of updates on your own personal profile or page.
- **"Like":** An engagement function that lets fans give positive feedback on a post.
- **Share:** The share feature lets you share the content you enjoy with personal Facebook friends.
- **Events:** Facebook Events can be created by a page or profile, and are used for parties, business events and planned chats.
- **Friends:** A friend is someone who received your friend request and accepted it. Once the request is accepted, you will start seeing their updates in your News Feed.
- **Fans:** These are the people who "liked" your business page. A business does not have to take any action for someone to become a fan.

LinkedIn is a business-oriented social networking site that provides brands and users a place to network and connect.

Numbers at a Glance

- 76% of users are outside of the U.S.
- 260 million daily users and 722 million members
- Remote jobs increased 2.5x from March to October 2020
- LinkedIn is regarded as the “most trusted” social network, with 73% of users saying they agree that LinkedIn protects their consumer data
- 57% of users are men, and 60% are between 25 and 34 years old
- 40 million people use LinkedIn to search for jobs each week
- 57% of LinkedIn’s traffic is mobile

Key Terms

- **Introduction:** A way to introduce yourself to those you are not currently connected to.
- **Profile:** Similar to a resume, you add information about yourself and your work history.
- **Company Page:** A place for businesses to include information about their business and create updates about their business and their industry.
- **Groups:** These can be public or private and can be created by an individual or company. Groups allow users to come together and talk about a specific subject on one page.
- **Recommendation:** A way to recommend a friend or colleague, based on their professional experience to anyone who views their profile.
- **LinkedIn Pulse:** LinkedIn’s digital publishing platform.
- **Influencers:** Key and influential people in your industry that can provide you with great content.
- **Invitation:** Invite someone to join your network and connect with you.
- **Degrees:** Shows how you are connected to a person even if it’s through a number of people.
- **InMail:** A premier feature to direct message any LinkedIn member.

Using Social Media Effectively

To effectively harness this massive audience on social media to grow your business, you need to know how to use social media effectively. Here are some guidelines to consider to use social media effectively.

Step 1: The Right Message

Step 2: The Right Audience

Step 3: The Right Time

STEP 1: THE RIGHT MESSAGE.

You need to make sure your message is directly relevant to your audience. Why would people want your service, why would they want to buy from you specifically? Brainstorm your niche. Outline the features and benefits you can offer your customers.

Listing out your features and benefits can help you define and simplify your messaging for social media. Highlighting the unique parts of you as a person as well as your offerings in an easy-to-digest manner will help you stand out from others who are selling insurance. But don't forget to use your own unique voice when crafting these messages.

Upon outlining your niche, consider the following examples of potential social media posts you could create to support your messaging for your customers.

- A slideshow on Instagram showing the benefits of how you can assist customers with selecting their insurance plan or reviewing if their current plan is a good fit for them and their needs
- A two-minute video overviewing the unique features of an insurance product or plan and how these features make your customers' life better
- An eye-catching image with a post copy that highlights benefits about your products
- A 30-second video testimonial on LinkedIn of a current agent, focused on the benefits they've experienced working at your firm

STEP 2: THE RIGHT AUDIENCE.

Think through demographics of your potential customers. Consider their age, sex, race and location. Also consider their behaviors, attitudes, philosophies and day-to-day lifestyles. Thinking through this information will help you with catering your messaging in a thoughtful way to capture your audience's attention.

Pro Tip: Adjust your messaging to the social platform you're using. For example, your message might work better on LinkedIn if it's more fact-based, while the same story can be shared on Facebook with more focus on the human element. Knowing the attitudes, behaviors and values of the types of individuals you want to attract will help you speak to them in a way that resonates with them — and this will ultimately help build trust with your customers.

STEP 3: THE RIGHT TIME. WHAT'S THE MESSAGING AND WHEN IS IT COMING OUT?

Making sure your message gets into the right hands at the right time means you need to know when and how to post in order to maximize the number of people who see your message.

There is no magic formula when it comes to post frequency. Post frequency varies by the individual. But one thing that should be kept in mind is that the **quality** of content should be the focus rather than **quantity**. It's important not to overwhelm (or underwhelm) your customers with post frequency. Posting too often or not often enough can actually hurt your engagement with followers.

FACEBOOK

Recommendation: Facebook is a key platform for your current customers. Keeping best practices in mind, we recommend the following posting strategy:

1-2 times per week

LINKEDIN

Recommendation: LinkedIn does not require a high post frequency because only 40% of users access it on a daily basis. Additionally, these users only spend 17 minutes on LinkedIn per month. We recommend the following posting strategy:

1x per week

4 Types of Social Content for Sharing Your Message

1. *Resourceful Social Content:* This consists of content that your insurance carrier or insurance agency or upline is sharing via social media. This could also include sharing information or insights from customer-facing documents, flyers or presentations. As you share resourceful content with your audience, add your knowledge by summarizing the key takeaways with your customers in mind. This will contribute to overall trust with your customers and will assert you as a thought leader in the insurance space.

Remember: Always include a call to action (CTA) in your posts and, when necessary, link to your resource in your social content. Examples of CTAs include calling for more information, scheduling an appointment, attending a webinar, downloading a document, visiting a website, etc.

Pro Tip: When sharing URLs, shorten the URL to the page you're directing traffic to by using a URL shortener like bit.ly. This saves valuable characters for your message, rather than a lengthy website url.

2. *Curated Social Content:* "Curated social content" is simply sharing relevant content from credible sources on your social media channels. It could be sharing an article about an insurance product or sharing a blog about relevant information on Medicare for your customers. The idea is to share content from other people to build your own credibility.

Remember: Add your own insight into why you wanted to share a particular piece of curated content. Sometimes this can be as simple as agreeing with the conclusion or adding an insightful quote you pulled directly from the content.

3. *Branded Social Content:* This content promotes your name and personal brand but not a specific product or service. This could be a quote from your carrier, agency or upline's commitment to quality, a testimonial from a recent customer you helped or your personal mission statement or about your background in the insurance industry — anything that tells your audience who you are, what you stand for and why you're worth following.
4. **Selling Social Content:** "Selling social content" directly sells an gives insightful information about products, services or your expertise you have to offer for potential customers.

Business Pages vs. Personal Profiles:

Social media is for branding, community building and creating an engaging space between you, your friends and your business audience. When it comes to deciding whether to create a business page or a personal profile, remember that it all depends on your goals as an agent and how far along you are in establishing rapport with your various audiences.

Personal profiles are great for doing things like communicating with your family and friends, sharing photos, videos and links with them, and connecting with your favorite brands, celebrities and causes.

A personal profile creates a connection that is just that — more personal. It provides the ability to create more intimate relationships organically where you're seen more so as a person rather than an organization.

On Facebook, you can be selective about who sees your content, allowing you to hide certain post types from certain people — so customizing and separating your posts from work and non-work-related content is quick and easy using a personal profile. On LinkedIn, you have the option to post your content within select audiences, including groups and event pages.

Business pages are the best way to market your business or organization. This is your business profile or “page” where customers can find your posts and business information.

With a business page, it's easier to keep business-related content and personal content completely separate with the option to share business-related content to your personal page when appropriate. This will prevent the followers on your personal page from being overwhelmed by work-related content.

On Facebook, your audience can post reviews and recommendations to your page, allowing others to vet and verify your credibility and share their experience with their friends to their Facebook timeline. On LinkedIn, users can follow your page to view your posts and content and to learn more about your organization.

Regardless of where your post is coming from, the more engagement it receives, the more the algorithm will see it as important content. Social media platforms want to show their users what it believes they want to see, so deciding upon keeping your business relations on your personal page or keeping things separate and creating a business page is simply a personal choice.

If you decide to create a business page from scratch, just know it may take some nurturing before you begin to see as much engagement as you would on your personal page, but it could prove a more professional brand image.

There are various features available within a Facebook and LinkedIn business page. To get started, refer to our guide on **How to Create a Facebook Page** and **How to Create a LinkedIn Page** for more information.