



Social Media

Strategy & Compliance Guide

As social media soars...

It's up to you as modern day, professional Life & Health Insurance Agents to stay up-to-date and on-point with marketing in a digital world.



And we're here to help!

Agility Insurance Services' all-in-one platform;
enrollinsurance.com is happy to provide you with some general
social media stats, tips, facts and guidelines.

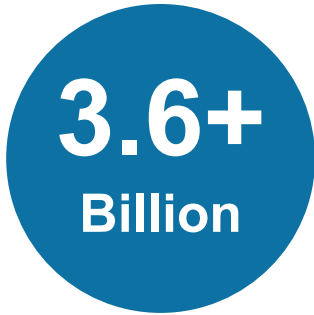


So why social media?

A white computer monitor with a thin bezel and a stand, centered on a blue background. The screen is filled with a solid blue color and contains white text. The text is arranged in two lines: the top line is 'Over 80%' in a large, bold font, and the bottom line is 'of Americans use some sort of social media.' in a smaller, regular font.

Over 80%

of Americans use some
sort of social media.



Worldwide Regular Users



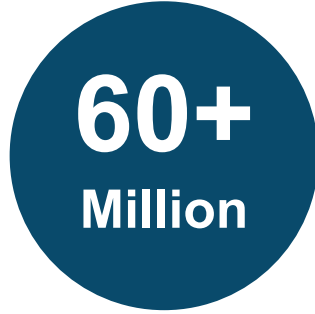
U.S. Daily Users



Research Insurance



Created Every Second



Active FB Business Pages



Businesses Use Paid Ads

And if that's not enough...

Over **78%** of sales pros using social
media perform better than their peers.





Let's Get Started!

How do I get started?

First, know your target audience:



Current and potential clients & people looking for more info on your business.



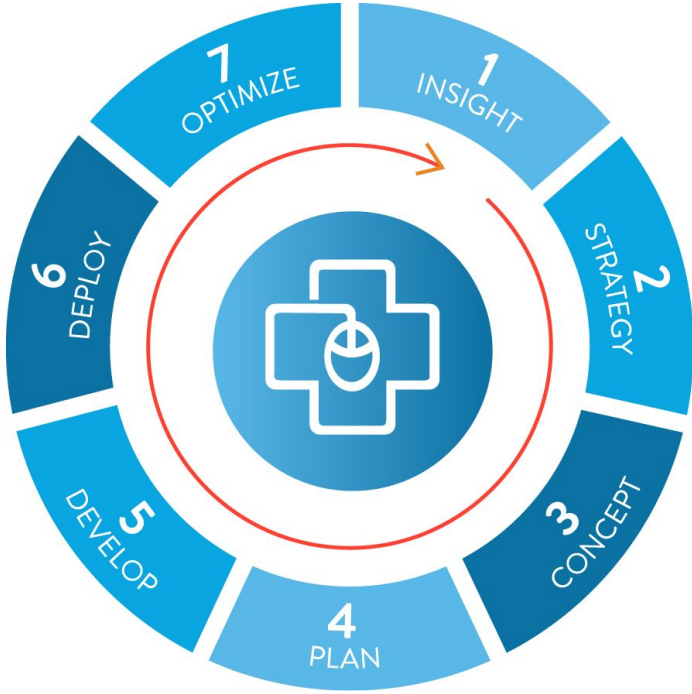
Commercial clients & business owners.



Younger clientele of current & potential clients.



Current clients, potential clients & people in the insurance industry.



What the process should look like...

1. Insight: Identify goals, objectives, conduct audience insight, develop personas, messaging platform, content strategy framework.

2. Strategy: Evaluate channel landscape, competitive social media audit, create social media strategy.

3. Concept: Align social media strategy with brand standards.

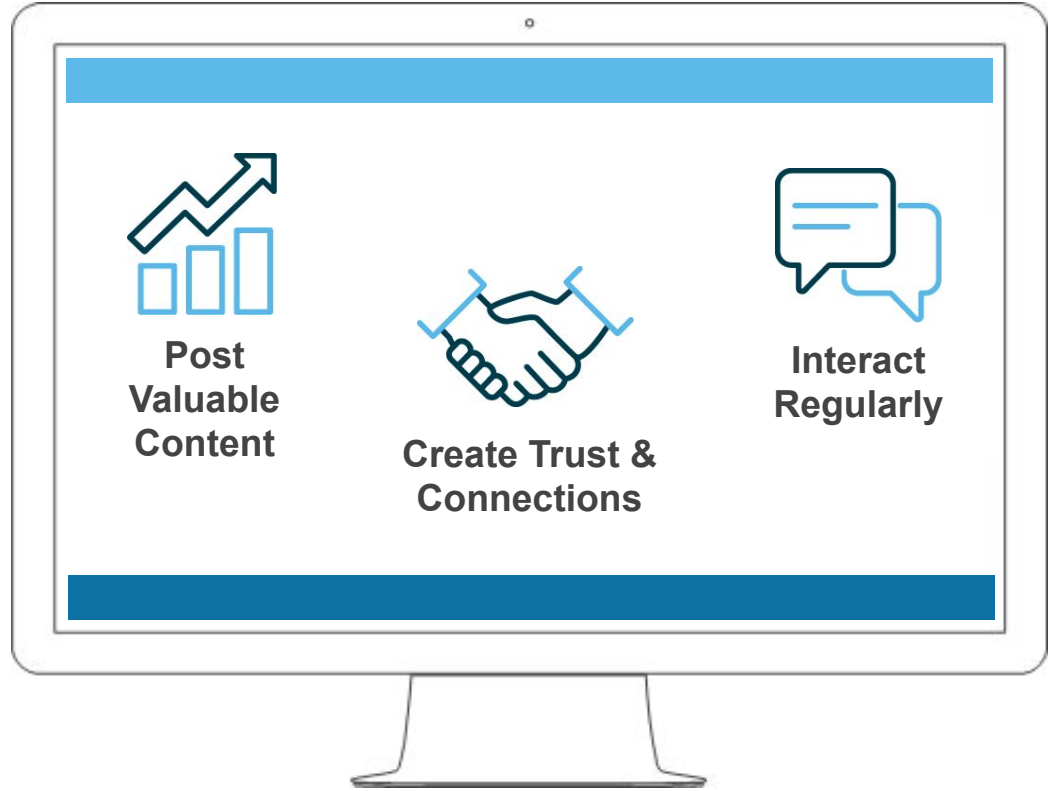
4. Plan: Audit existing content, review existing social media policies/guidelines if available, develop content marketing plan, create social media editorial calendar.

5. Develop: Develop content.

6. Deploy: Schedule posts, monitor social activity.

7. Optimize: Monitor social metrics, create report, optimize content based on performance.

Keep in mind when getting started:



Facebook & LinkedIn

Key starting points for Life & Health Insurance Agents



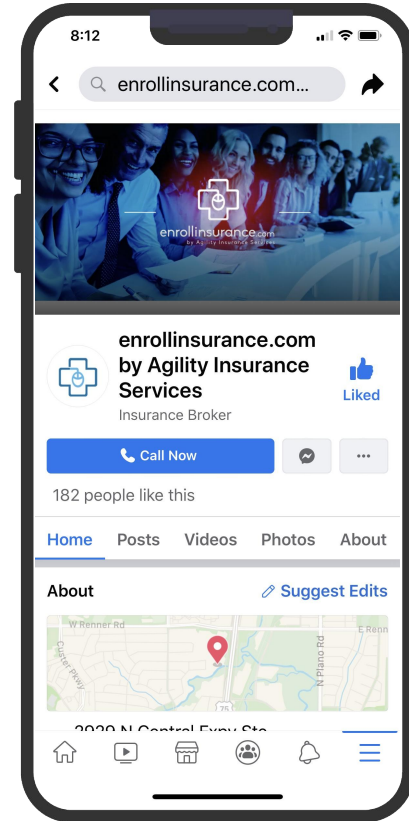
Facebook is the largest social media site in the world and continually growing. It has the broadest reach of any social media platform and **over 70%** of US adults use it.

It's best used for:

- **Find middle-market prospects who are raising families** (30–59) or approaching retirement (60+).
- **Look for posts about life events** (getting married, buying a home, having a baby, a child's graduation, a new job) that you can use to start conversations about insurance or recruitment.
- **Grow your reputation and network** by posting valuable content for clients and prospects.

5 Easy Steps to Optimize your Facebook page

1. **Fill out your profile** as completely as possible, including photo, description and your up-to-date information.
2. **Make sure to use the “About us” section** to give your potential clients and recruits a good description of who you are and what you do and make sure to link your website.
3. **Include your contact information**, specifically phone and email, so you can be reached easily.
4. **Add a call-to-action button** like “Call Now” to your page.
5. **Choose a custom web address** (facebook.com/Your business name here) so it’s easier for you to be found.





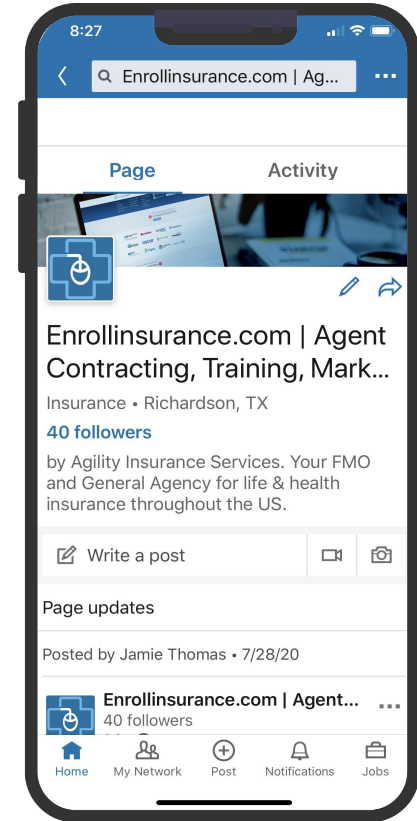
LinkedIn focuses on the world of business and professionals. Making this the best option for connecting with professional prospects, and business owners. With **over 50%** of Americans with a college education on the site.

It's best used for:

- **Identify and recruit top talent** for your brokerage through search.
- **Build relationships and trust** with professionals and other sources who might refer recruits or clients.
- **Generate leads** for business owners or educated prospects.

6 Easy Steps to Optimize your LinkedIn page

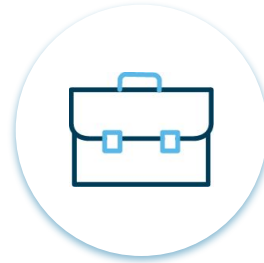
1. **Update your photo** with a high-quality and professional image.
2. **Change your headline** to let customers and clients know what you do, instead of a simple title.
3. **Ask existing customers** and employees to review your business to add credibility and trust.
4. **Post content** to populate your page, especially content with eye-catching visuals and educational.
5. **Include a concise summary** of your business, including any goals or achievements, and add a CTA (call-to-action) at the end.
6. **Join LinkedIn groups** and industry discussions.





What are the best practices?

Social media is a way for you to sell your expertise and trustworthiness, **not your products.**



Be friendly & professional



Keep it short & sweet



Be the expert & educate your audience








Use eye-catching images & videos



Share relevant & trending content







Social Media Content Specs

Every channel has requirements and best practices all its own. Remember, always to use a strong **CALL-TO-ACTION**.


					
Tone	Conversational, energetic, curious	Lighthearted, informal, human	Professional, technical, collaborative	Descriptive, customer-centric	(See Facebook)
Best Length	100 characters	50 characters (When sharing link)	2 sentences	2–3 sentences (Include keywords)	138 character average No proven ideal
Tagging	2 hashtags or less; @-mention specific followers or influencers	(Avoid hashtags)	(Avoid hashtags)	5–7 tags (Keywords)	5, 9 or 11 hashtags Geo-tag for events
Pro-Tips	Include images; create hashtags for events and campaigns	Questions, images and videos engage the most	Ask big questions reply to comments	Titles should read like an optimized blog post title	Stick with one filter use popular #s when relevant

Posting Frequency

Use these best practices in conjunction with your individual platform's analytics. Those stats will show the best frequency for your specific brand and social channels.

						
Daily	15 tweets per day, make 7 of those Retweets Act ~ 1x per hour	1 post per day 1 repost/share every other day	1 post per day 1 repost/share every other day	1–2 posts per day	11 pins per day (5 at the least) 5 repins per day	2 posts per day 1 repost/share every other day
Weekly	5 days per week	3 days per week	5 days per week	5 days per week	6 days per week	3 days per week
General	Repost tweets from previous days to push them up the feed			Regram only when relevant to audience and brand		

Optimal Posting Times

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		12pm 5pm	12pm 5pm	12pm 5pm	12pm 5pm	12pm 5pm	
	12-1pm		3pm	3pm	1-4pm	1-4pm	12-1pm
			10-11am 7:30-8:30am 12pm 5-6pm	7:30-8:30am 12pm 5-6pm	7:30-8:30am 12pm 5-6pm		
		8-9am** 1-2pm 2am Video: 9pm-8am	8-9am 2am	7pm 2am	1-2pm 2am Video: 9pm-8am	8-9am 2am	8-9am 5pm 2am
	2-4am 2-4pm	2-4am 2-4pm	2-4am 2-4pm	2-4am 2-4pm	2-4am 2-4pm	3pm 2-4am 2-4pm	8-11pm 2-4am 2-4pm
		9-11am	9-11am	9am 9-11am	9-11am	9-11am	

General Copy & Content Writing...

- Evoking curiosity is a strong way to generate clicks
- Make your headline match your content
- Write with a conversational tone
- Being too salesy can actually hurt sales
- Make copy clear, dark and easy to read
- Simplify your landing page design/copy and CTA
- Answer objections within your content

Headline Rules & Best Practice...

- Numbers and negative words increase CTR
- Keep headlines under 65 characters for search
- Make your headline match the content
- Odd numbers perform better than even
- Aim for 6 word headlines or less if possible
- Avoid words with multiple meanings
- Include power words and adjectives

A blue-tinted background image featuring medical supplies: a stethoscope, several pills, a pair of glasses, and a document with the word 'Medicare' visible. The text 'Medicare Guidelines' is overlaid in a white box.

Medicare Guidelines

Do's & Don'ts

Medicare Marketing on Social Media

The Don'ts...

- **Do not** use carrier names, brand logos or plan abbreviations, in any combination or variation, in domain names or UR links.
- When using Medicare references (including Social Security Administration (SSA), Department of Health and Human Services (DHHS), Medicaid, or any other government entity **must not include** or use carrier name, plan information, or logos.
- **Do not** use symbols, emblems, images, logos, or color schemes that may be misleading or convey (or could be reasonably construed as conveying) a false impression that you, your business, or the content are approved, endorsed or authorized by Medicare or any other government entity.

The Don'ts...

- **Do not** use prohibited terminology or misleading and/or inaccurate information. Also, do not use unsubstantiated (absolute or qualified) statements or superlatives (e.g., “one of the best”, “the biggest”, “free plan”, etc.)
- **You must not** discriminate based on race, ethnicity, national origin, religion, gender, sex, age, mental or physical disability, health status, receipt of health care, claims experience, medical history, genetic information, evidence of insurability, or geographic location.
- **Do not** use “Medicare” in your Domain Name and/or URL.
- **Do not** use the term “free” to describe zero-dollar premium plans.

The Do's...

- **You may indicate the product types you are authorized to offer. For example:**
 - a. Medicare Advantage
 - b. Medicare Advantage Special Needs Plans
 - c. Medicare Supplement Insurance Plans
 - d. Part D Prescription Drug Plans
- **You may provide your contact information, agent title, and your business services.**

The Do's...

- **You may post current basic Medicare information, such as :**
 - a. Part A and B Coverage descriptions, premium and deductible amounts
 - b. Part D coverage state information
 - c. Educational content, but you should cite sources.

- **You may generate electronic Business Reply Cards, or eBRC's,** from an online contact form or a similar section to obtain Permission to Contact. These must be generic and must include statements or options that would lead a consumer to reasonably understand that they will be contacted by a licensed sales agent to discuss Medicare Plan options. It must also indicate exactly how the consumer will be contacted. If you are generating leads for Medicare Supplement Plans, it must include the disclaimer “This is a solicitation for insurance”.

Medicare & Facebook

- Wednesdays & Thursdays - Engagement is 18% higher on average.
- Highest Traffic is Mid-Week between 1pm-3pm.
- Boosting your post with just \$5 a day can reach thousands of people.

Facebook Advertising:

- Must be generic unless it is a direct carrier resource
- The Headline Window section must show clear intent of the online contact request.
“Talk to a licensed sales representative”
- In the description window, include a statement to show the consumer will be contacted by a licensed agent to discuss Medicare insurance options.
“Submit your information and I will contact you about your Medicare coverage options”
- Indicate the scope of products that may be discussed.
“By submitting this form, you agree that a licensed sales representative may contact you about Medicare, Prescription Drug, and Medicare Supplement Plans.”
- Remember the disclaimer for Medicare Supplement Plans
“This is a solicitation for insurance”

Facebook Advertising:

- Include the specific method of contact. You can have check boxes for the consumer to choose from.
- If you are using approved carrier branded marketing and plan materials, you cannot post plan specific information, benefit structure or information, premium or cost sharing information, or comparisons or rankings between plans, including star rating information.
- Most carriers will require you to use a business account when conducting business on behalf of said carrier, not a personal or multi-purpose account. They may also require that you register your business social media platform with them.
- Refer to carrier specifics for content design and approval before adding any carrier branded marketing.



ACA Guidelines

ACA Rules...

- **Do not** use carrier names, brand logos or plan abbreviations, in any combination or variation, in domain names or UR links.
- **Do not** use prohibited terminology or misleading and/or inaccurate information. Also, do not use unsubstantiated (absolute or qualified) statements or superlatives (e.g., “one of the best”, “the biggest”, “free plan”, etc.)
- **You must not** discriminate based on race, ethnicity, national origin, religion, gender, sex, age, mental or physical disability, health status, receipt of health care, claims experience, medical history, genetic information, evidence of insurability, or geographic location.
- **Do not** use symbols, emblems, images, logos, or color schemes that may be misleading or convey (or could be reasonably construed as conveying) a false impression that you, your business, or the content are approved, endorsed or authorized by ACA or any other government entity.

More Resources

[The Facebook Boost Post Button: How to Use it and Get Results >>](#)

[How To: Setting Up Your First Facebook Campaign >>](#)

MyAdmin [Login](#) or [Register](#)

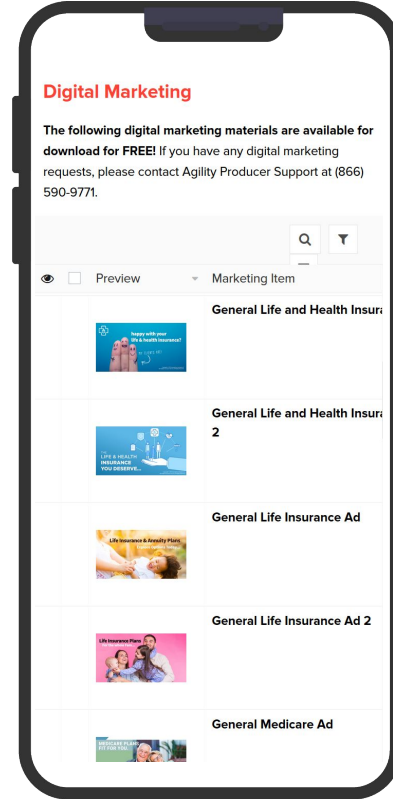
Social Media Marketing Checklist:



- Is my post CTA sales or building my profile?
- Does this post provide value to my audience?
- Is my post friendly and professional?
- Did I included a image or video?
- Can I link to my website with this post?
- Is it short, sweet and easy to read?
- Is my information true and accurate?

And now with **MyAdmin**, you can login and download professional and custom social media ads for general or specific insurance markets.

And don't forget to like and follow us @



Let's break it down in a nutshell. Agility's agents are the backbone of our success, so we go to great lengths to see that you are successful. Like many agencies, our support services include initial **onboarding, carrier contracting and product training.**

Unlike other agencies, our support services also include **bilingual support specialists, technology platforms** to improve enrollment efficiency, **marketing plan development** and implementation, access to customized and targeted **marketing materials, enrollment support and commissions advocacy** with carriers.

Enrollinsurance.com is our one-stop life and health insurance agent services platform. We provide our agents access to **40+ industry leading carriers** across all 50 states. We pride ourselves on going above and beyond for our agents and brokers. We do this with:

- **All-in-one MyAdmin Back Office**
- **Medicare Quoting & Enrollment App**
- **ACA Enrollment Platform**
- **Top Contracting Services**
- **Unparalleled Enrollment Support**
- **Unlimited Training & Webinars**
- **Live Events & Promos**
- **Elite Resources & Tools**
- **Custom Marketing Material**



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