

A background image for the title section showing a blurred financial candlestick chart with various colored bars (blue, orange, green) and dashed trend lines on a dark blue background.

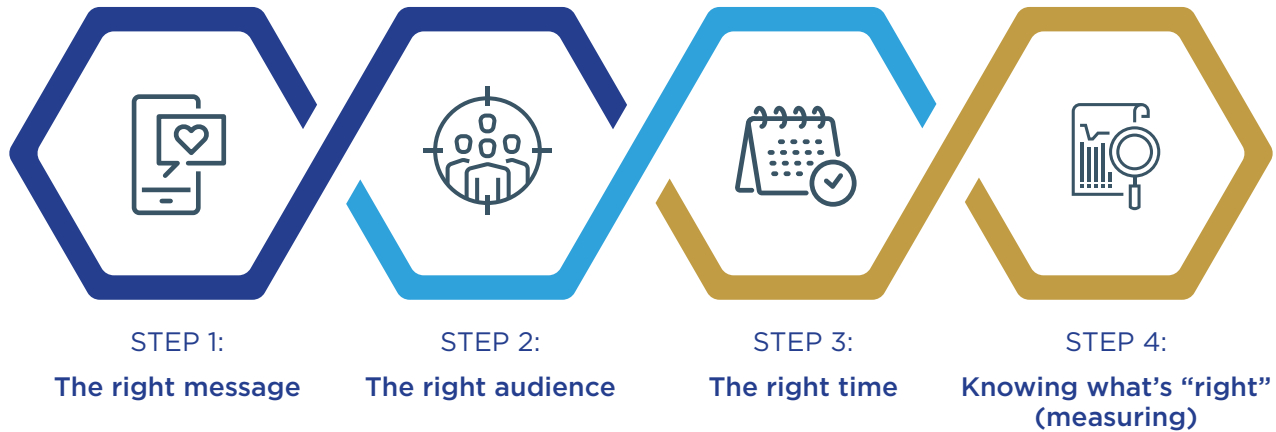
BEST PRACTICE

FOR USING SOCIAL MEDIA TO
RECRUIT AGENTS



In 2019, 79% of Americans had at least one social media profile. It's no wonder that social platforms have become such an important channel for sales, marketing and recruiting. To effectively harness this massive audience to grow your business, you need to know how to use Facebook, LinkedIn, YouTube, and Instagram effectively. The following guidelines can help.

THE RIGHT STUFF



Using Social Media for Agent Marketing

STEP 1: THE RIGHT MESSAGE



To successfully recruit new agents using social media, you need to make sure your message is directly relevant to your audience. Create a list of all the reasons people would want to become part of your organization. That list may look something like:

1. We provide our agents with access to unique resources that make selling insurance easier
2. We deliver you warm leads with a state-of-the-art marketing technology
3. We offer competitive compensation and allow you to be your own boss

Then, break down your list into features and benefits that you offer. If we do that to the list above, it might look something like this:

Features	Benefits
Access to resources	Make sellings easier
State-of-the-art marketing technology	Sell more, faster
Employee compensation	Peace of mind

Separating features and benefits can also help you simplify your message — a big asset in social media. Using the example above, here are some social media posts you could create to support your message:

- A slideshow on Instagram showing the benefits of being an agent for your FMO
- A two-minute video published to YouTube laying out all the unique features of your firm and how these features make agents' lives better
- An eye-catching image of one resource with post copy that highlights it. Make this a series where each week you publish one resource or feature that's compelling to your audience
- A 30-second video testimonial on LinkedIn of a current agent, focused on the benefits they've experienced working at your firm

Pro Tip: Highlighting the unique parts of your business will help you stand out from others who are recruiting the same agents you're targeting. Don't forget to use your own, unique voice when crafting these messages.

Using Social Media for Agent Marketing

STEP 2: THE RIGHT AUDIENCE








Once you have your message down, you need to deliver it to potential agents. This starts with knowing your audience by looking at and analyzing demographic and psychographic information.

Demographics are things like, age, sex, race and location. Psychographics are behaviors and attitudes. Write down what demographics and psychographics you want to hire for and adjust as your needs change.

Pro Tip: Writing down the behaviors and attitudes of your most successful agents can help guide your targeting.

Doing so can help you determine which social media platforms to use in recruiting. Should you use Instagram or LinkedIn? YouTube or Facebook? You want to go where your audience is — and the graph below can give you a sense of where that might be.

% of U.S. adults who use each social media platform

						
Total	68%	35%	25%	24%	29%	73%
Men	62%	30%	25%	23%	16%	75%
Women	74%	39%	25%	24%	41%	72%
Ages 18-29	81%	64%	29%	40%	34%	91%
30-49	78%	40%	33%	27%	34%	85%
50-64	65%	21%	24%	19%	26%	68%
65+	41%	10%	9%	8%	16%	40%
White	67%	32%	26%	24%	32%	71%
Black	70%	43%	28%	26%	23%	76%
Hispanic	73%	38%	13%	20%	23%	78%
High school or less	60%	29%	9%	18%	18%	65%
Some college	71%	36%	22%	25%	32%	74%
College graduate	77%	42%	50%	32%	40%	85%
Urban	75%	42%	30%	29%	29%	80%
Suburban	67%	34%	27%	23%	31%	74%
Rural	58%	25%	13%	17%	28%	59%

Source: PEW Social Media Fact Sheet, 2019

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, making your company familiar and compelling.

Using Social Media for Agent Marketing

STEP 3: THE RIGHT TIME



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. How long should it be? How many hashtags should you use? Should you use hashtags at all? What time of day should you post? These are all key questions.

How Often Should I Publish Content?

It's important to have the right amount of post frequency. Posting too often or not often enough can hurt engagement with followers, so try to stick to these general guidelines:



Facebook
1-2 per day



Instagram
1-3 per day



Instagram stories
3-8 per month



LinkedIn
1-2 per week



Twitter
3-10 per day

How Often Should I Publish Content That is Intended to Help Recruit Agents?

Once every four social media posts. Mixing up the type of content you publish can help you truly engage and attract the right audience.



Pro Tip: Use an editorial calendar to plan out your social media content for the month. Start by planning which content you want to create, assigning each to a date and social platform. An Excel sheet is enough to get started, but it's best to use one of the many free editorial calendar templates that can be found with a simple Google search. Make sure to check with your project management software provider — they may have templates that integrate well with their software.

What Time Of Day Should I Publish Social Content?

Short answer: Whenever you have something valuable to share with your audience.

Longer answer: Whenever you have something valuable to share with your audience when your audience is on social media. To help you understand when that is, we put together the following cheat-sheet. It's important to note that these are general guidelines and your audience will likely be different. Testing and tracking your posts over time will help you develop “best practices” for your specific business and audience.

Best Posting Times for Engagement by Platform

				
Monday				
Tuesday		8:00 AM		
Wednesday	10:00 AM – Noon	10:00 AM – Noon	8:00 AM – 10:00 PM	8:00 AM – 2:00 PM
Thursday			9:00 AM – 1:00 PM	
Friday		10:00 AM – 11:00 AM	9:00 AM	9:00 AM
Saturday	Worst Day	Worst Day		
Sunday	Worst Day	Worst Day	Worst Day	Worst Day

Publishing content when audiences are online will help drive higher engagement. Use the chart above as a guide. Note: The highlighted days and times are specific to the health care industry; other times, not highlighted, are general best practices.

Pro Tip: Schedule your social media content to be published at the right day and time. Not only will this help ensure that your social media content is hitting audiences when it needs to, but scheduling can also be done weeks or months in advance, rather than daily. There are many free and paid tools to help you schedule your social media content, and many also offer good metrics. Some of our favorite scheduling tools are Hootsuite, Buffer and Later.

Using Social Media for Agent Marketing

THE 4 TYPES OF SOCIAL CONTENT

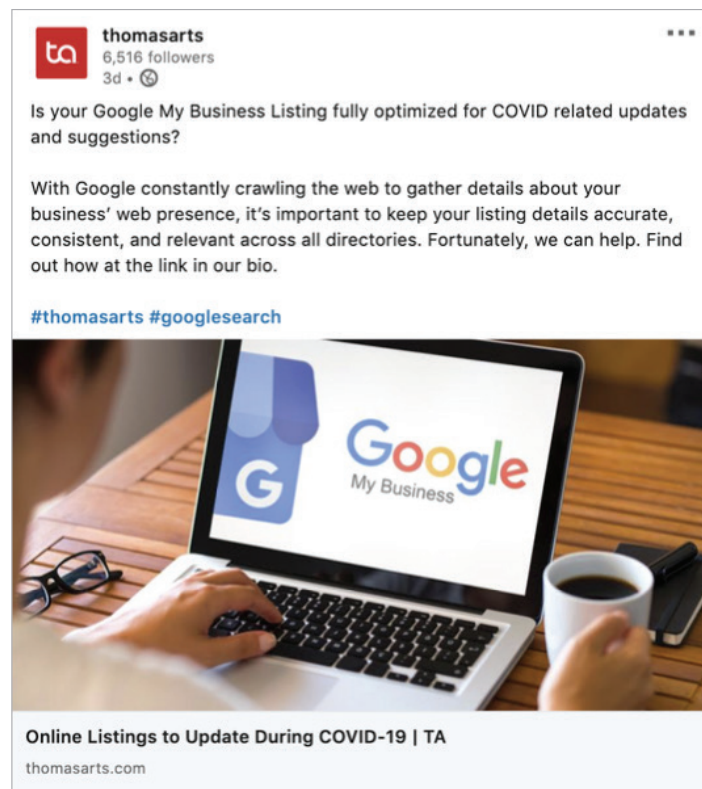
There are the four main types of social media content that will help you put variety into your communications.

1. Resourceful Social Content

This consists of content that you already have like a blog post, a recommendation from an existing agent or even a new feature on your website. An easy way to create a resourceful social post is to either a) tease your audience with a question that the content you're promoting answers or b) summarize the key message or findings that the post delivers. For agent recommendations, a photo of the agent and quote is enough to get your message across.

Remember: Always include a call to action (CTA) and link to your resource in your social content, in your bio or in your social post copy.

Pro Tip: Shorten the URL to the page you're directing traffic to using a URL shortener like bit.ly. This saves valuable characters for your message, rather than a lengthy address.



Above is an example of Integrity Partner ThomasArts syndicating its own content on social media.

2. Curated Social Content

Curated Social Content is simply sharing relevant content from credible sources on your social media channels. It could be sharing a *New York Times* article on the rising costs of funeral services or a webinar from AARP summarizing changes to Medicare. 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 brand, but not a specific product or service. This could be a quote from your CEO on your company's commitment to quality, your mission statement or an announcement of a recent award you received — anything that tells your audience who you are, what you stand for and why you're worth following.



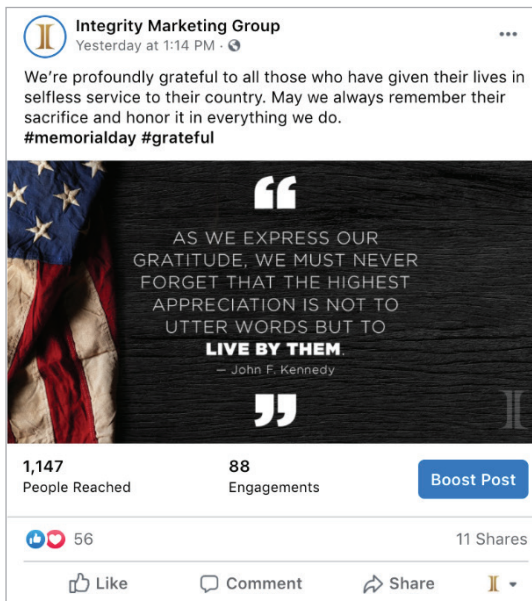
Above is an example of Integrity Partner Family First Life curating content from others to fill its social media content.



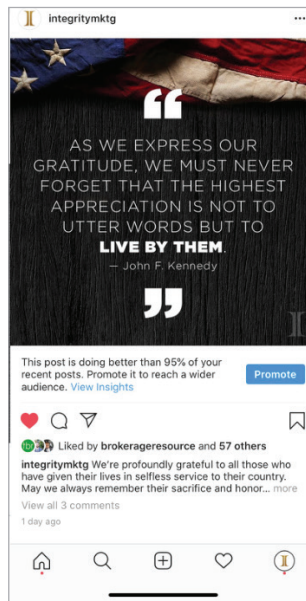
To the left is an example of Integrity Partner GoldenCare publishing branded content on their social media platform.

4. Selling Social Content

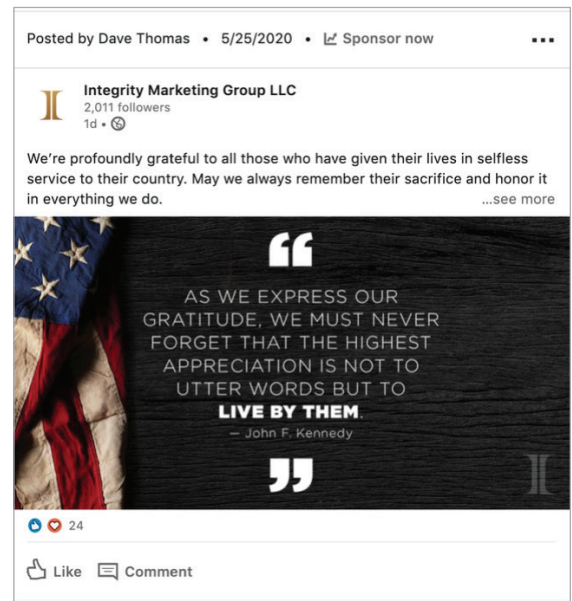
Selling Social Content directly sells a product, service or your company to prospective agents. For recruitment, this is where you can communicate all the reasons an agent should want to join your team. By publishing Selling Social Content once every four social posts, you're showing agents that you have the expertise, tools and brand they can be proud to sell for.



Facebook



Instagram



LinkedIn

Above is an example of Integrity posts that can be “boosted” or “promoted” to reach a wider audience. While in each platform, simply click the appropriate button (“Boost Post” on Facebook, “Promote” on Instagram, or “Sponsor Now” on LinkedIn), select your preferred targeting (age, location, interests) and the promotion start and end date. See below for the detailed steps to do this on Facebook.

Boosting Facebook Posts to Reach More People

More than another platform, Facebook is pay-to-play. To ensure your Facebook content is seen, consider putting some money behind your Facebook content. We recommend starting with \$25/post for 5 days. Then test with more or less to get the clicks and engagement you're looking for. Here's a quick tutorial to help.

Note: Boosting content is different than Facebook ads, which uses Facebook to distribute advertising, not content.

Boosting Social Posts

Step 1: Click "Boost Post" on the post you would like to promote.

Step 2: Identify the "goal" of this post. Do you want engagements (comments, likes, shares) or direct messages? See Step 4 for an explanation of what these goals mean.

Step 3: Select gender, age and the location of the users you would like to target.

Step 4: To become more targeted, select the interests of the users you would like to target.

Step 5: Identify budget and duration of promotion.

Step 6: Input payment information, save Audience and then click "Boost Post Now."

Edit Audience

Select the location, age, gender and interests of people you want to reach with your ad.

Gender

AllMenWomen


Age

1865+

Locations

Locations
Type to add more locations

United States
United States X



Detailed Targeting

Life insurance

Interests

Insurance XLife insurance X


Demographics

Independent Insurance Agent XLife Insurance Agent X
Insurance Specialist XInsurance X

Suggested For You

Insurance +Health Insurance Specialist +Allianz +
Insurance +Life Insurance Advisor +Insurance Consultant +
Insurance Adviser +Insurance Agent/Owner +

For advanced targeting features, go to [Ads Manager](#).



Potential Reach: 71,000,000 people
Your audience selection is fairly broad.

CancelSave Audience

Using Social Media for Agent Marketing

STEP 4: KNOWING WHAT'S "RIGHT"



Measurement is a critical part of marketing. There's a lot you can measure, but what are the key performance indicators (KPIs) that matter most to your recruiting efforts?

1. Measuring success

Every social media platform provides users with an analytics dashboard where you can dissect the performance of every post published. When creating your monthly content calendar, it's important to have a specific goal in mind for each post so you can know what metrics to report on. This will help you accurately report on performance.

2. KPIs

Metric Overview: Listed below are recommended metrics for tracking your social media success.

Reach: The number of people who saw your ads at least once. This is different from impressions, which may include multiple views of your ads by the same people.

Impressions: The total number of times your ad was seen.

Post engagements: The total number of actions that people take involving your ads (likes, comments, shares).

Link clicks: The number of clicks on links within the ad that led to destinations or experiences, on or off Facebook.

Click-through rate: The percentage of times people saw your ad and performed a link click.

Cost per click: The average cost for each link click.

See the Glossary in the Addendum for more potential KPIs and additional definitions.

Goal Types:

A. Goal = Engagement and Awareness

If the goal of your post is to engage followers, the appropriate metric will be engagements received, including comments, likes, reactions and shares. If the engagement post is a video, you will want to include video views and video completions as well.

Example: A post highlighting an employee or a post highlighting a company goal being met.

B. Goal = Traffic

If the goal of the post is site traffic to your website, look at the number of link clicks received on the post, as well as the CTR (Click-through-rate) and CPC (cost-per-click), if available.

Example: A blog post shared to Facebook. The goal of this post is to receive link clicks on the blog post, so that more traffic is driven to the full blog on your website.

C. Any of the above

No matter the goal, it's important to report on the number of people who saw your post using reach and impressions. When more people see the post, it shows the post is engaging. That's why these metrics are important for any post.

3. Examples From Facebook, Instagram and YouTube

Each social platform has its own version of page "Insights" where you can find the basic metrics needed to track performance.

Pro Tip: Investing in a third-party social reporting app, like Hootsuite, Hubspot or Later, will provide you with much more information than social platforms can.













Facebook: Access these metrics once in “business manager” mode

Page Ad Center Inbox **20+** Manage Jobs Insights More ▾ Edit Page Info Settings Help ▾

Overview
Ads
Followers
Likes
Reach
Page Views
Page Previews
Actions on Page
Posts
Branded Content
Events

All Posts Published [Create Post](#)

Reach: Organic / Paid Post Clicks Reactions, Comments & Shares

Published	Post	Type	Targeting	Reach	Engagement	Promote
05/19/2020 2:00 PM	 Mike Killmett, owner of Family First Life South East, is featured on			60	0 3	Boost Post
05/19/2020 12:01 PM	 Robb Turnbull from Neishloss & Fleming, LLC is competing in			88	2 3	Boost Post
05/19/2020 11:01 AM	 Today we are featuring Integrity Idol semi-finalist Robb Turnbull			139	5 13	Boost Post
05/19/2020 8:51 AM	 Integrity welcomes Equis Financial to the #IntegrityFamily. Equis			1.6K	190 117	Boost Post

Instagram: Access these metrics in the Instagram app under “Insights”

integritymktg 470 profile visits in the last 7 days
111 645 171

Settings
Archive
Insights
Your Activity
Nametag
Personal Information
Saved
Shopping Bag
Close Friends
Discover People
Open Facebook

2:54

Insights

Content Activity Audience

Overview 57 posts and stories this week
+24 vs. May 12 - May 19

Posts See All

Feed posts ordered by number of times they were seen.

Grid of posts with view counts: 422, 373, 368, 359, 356, 347, 335, 330, 327, 320, 317, 312, 303, 298, 300.

YouTube: Access these metrics in YouTube Studio

Channel analytics [ADVANCED MODE](#)

Overview Engagement Audience

Jun 9 - Jul 6, 2020
Last 28 days

Watch time (hours)
80.0
↓ 25%

Average view duration
0:38
↓ 2%

Line graph showing engagement over time.

Jun 9, 2020 1 video published
[SEE MORE](#)

Episode 39: Chad Milner – Who You Know
Jun 16, 2020

Jun 23, 2020 Jun 27, 2020 Jul 2, 2020 Jul 6, 2020

Pro Tip: Start using Facebook’s Ads Manager to really take advantage of the platform. With Ads Manager, you can create highly targeted ad campaigns that go well beyond just “boosting” your organic social posts. You can also get Facebook and Instagram to show your ads only to their users who have visited your Facebook or Instagram accounts before or who have visited your website. This is called “retargeting,” and it can help make your advertising dollars work more efficiently.

4. Frequency of Performance Review

Social Media is always changing. You may find that something that used to perform well doesn’t any longer. Your brand must evolve, just as users and platforms do. We recommend regular performance reviews. The findings you discuss in these reviews will influence your upcoming social content.

Pro Tip: Constantly test your social media posts to discover what works best for your audience. A great place to start is testing different creative (like an image of a person vs. an image of a building) and testing different messages and content types (like videos vs. images vs. carousels).



I. Social Media at-a-Glance

Every brand's social media community responds differently to social posts. So, the ultimate best practice is to test, measure and track your brand's social media content, length, and frequency to develop your own data-driven "best practices."

The following information is to help brands that are just getting started.

	Facebook	Instagram	LinkedIn	Twitter
Post character count (organic)	Max: 63,206 Optimal: 40-50	Max: 2,200 Optimal: 125	Max - brand accounts: 700 Max - personal accounts: 1,200 Optimal: <140 Post headline: 100	Max: 280 Optimal: 120-130
Post character count (paid and boosted)	Optimal: <125 Headline: 5 words		Post headline: 25 Description text: 75	
Hashtags*	Recommended: No more than 2	Max: 30 Optimal: 9-12	Recommended: No more than 2	Recommended: No more than 2
Post frequency*	<10,000 followers: 1-5/month 10,000+ followers: 1-2/day	7-10/week More important than frequency is consistency for engagement	At least 1/weekday More important than frequency is content, keep it professional for maximum engagement	3-5/day
Image specs in pixels (paid and organic)	Feed: 1200 x 630 Stories: 1080 x 1920 Images with more than 20% text may experience reduced delivery	Feed - square: 1080 x 1080 Feed - portrait: 1080 x 1350 Stories: 1080 x 1920 Images with more than 20% text may experience reduced delivery	1104 x 726	440 x 220
Video specs	1:1 Ratio/Square File type: .MP4 and .MOV	1:1 Ratio/Square File type: .MP4 and .MOV (Instagram does NOT upload GIFs)	1:2.4 to 2.4:1 File type: .MOV, .MPEG-1, .MPEG-4	1:1 Ratio/Square File type: .MP4 for web and .MOV for mobile
Video length	Feed/Ad: 120 min. max Ideal length: 2 min.	Feed: 30 seconds - 1 minute IGTV: 15 seconds - 10 minutes Ad (boosted): 60 seconds	Feed: 3 seconds - 10 minutes Ad - max: 30 minutes Ad - recommended: 15 seconds	Feed: 140 seconds max

*These topics are a source of great debate, but one thing social media marketers agree on: Focus on quality and relevance, and test, test, test to determine what works best for your audience.

A. Best-performing and recommended content



- Human-centric stories
- Emotional stories
- Brand engagement



- Human-centric stories
- How tos / Tips + tricks
- Quotes
- Mini blogs
- Authenticity
- Transparency



- Stats, facts + figures
- Industry news + trends
- Professional insights
- Company news



- Stats, facts + figures
- Quotes
- Curated content
- Industry trends
- Timely content

B. The keys to publishing for maximum engagement is:

1. Aim for quality content.
2. Get engagement early, so publish content when your audience is most likely to be awake and on the platform, either on mobile (like taking the train to work) or on desktop (right before and after lunch).

II. Glossary of Terms

- A. A/B test: A method of comparing two variations of a piece of content (ad), so you can see which version will perform better. Also known as “split testing.”
- B. Boosted content: A form of social media advertising where you pay to show a specific organic social post to people who do not already follow your social media accounts. Also known as “promoted” content.
- C. CTA: Call to action, what you want your audience to do when they interact with your social media content. Be specific!
- D. CTR: Click-through rate, a measure of how many people who viewed your post clicked through to read more, buy or take some other action. Measures the effectiveness of social media content in driving people to your own website. Calculated as the number of clicks/total impressions, and expressed as a percentage.
- E. Dark posts: A form of social media advertising where content is pushed to a specific audience, but is not published to your social media account or timeline — and cannot be found organically.
- F. Dark social: Social sharing that can’t be traced back to the original source, often because it has been shared through private channels (like email or messaging apps), rather than through public channels like timelines and newsfeeds. This traffic shows up in analytics programs as “direct traffic.”
- G. Engagement: Any interaction with your content where the audience had to take some action, including “likes,” “comments,” “shares” and “views.” Often measured as an engagement rate.
- H. Engagement rate: While there are a few ways to calculate this critical social media KPI, it’s

often the number of engagements (or a specific engagement) divided by the number of people the content was exposed to.

- I. KPI: Key performance indicator, a specific metric that determines how your social media activities are performing against a specified business goal. This may include things like “comments,” “shares” and CTR.
- J. Impressions: The total number of times your ad was seen.
- K. Organic social content: Social content you post to your social media platforms.
- L. Promoted content: See “Boosted content.”
- M. Reach: The total number of people who have been exposed to your social content, but not necessarily a measure of the number of people who actually saw your content (they can scroll right past it).
- N. Social listening: A two-step process of social media monitoring and responding to the data collected in some way. This may be “liking” their post or changing your internal communications for the future.
- O. Social media monitoring: Finding and assessing what is being said about a specific topic, like your company, product or industry.
- P. Split testing: See “A/B test.”
- Q. Sponsored posts: Social media posts where an influencer, like a celebrity, promotes a brand or product because they’ve been paid to do so. These posts are identified as #ads or #sponsored.
- R. Stories: A form of social media content, typically popular with younger generations, that disappears after 24 hours. Stories can be posted to Snapchat, Facebook and Instagram.
- S. Tag: A keyword that is added to a social post to categorize content, or when tagging an individual social media account to a post that associates that account with the content.
- T. Targeting: Selecting a specific audience for social ads and boosted posts, in order to maximize conversions. Social platforms offer a variety of targeting options based on demographics, locations and interests.
- U. Trending: A topic or hashtag that is popular on a specific social media platform at a given time, and is based on your location, who you follow and the content you prefer.
- V. UGC: User-generated content, social content that is created by users of your products, services or your social media audience without your paying for them (different than a sponsored post). Brands often reshare UGC with their own followers to showcase authentic reactions and to encourage more users to generate content.
- W. URL shortener: a tool that shortens a long URL into something more social media-friendly. Popular URL shorteners include bit.ly and ow.ly (both of which are free).