

SOCIAL MEDIA ENGAGEMENT GUIDE

Social media is an essential piece of your business marketing strategy! Social media platforms help you increase awareness about your services, promote your brand, connect with your clients and colleagues, and boost your leads and sales!

This Social Media Engagement Guide is meant to educate you on how to properly use social media as well as how to create your own content. In addition to this guide, we have created free content in the [Equis Branding Materials Library](#), a growing library of all corporate media (logos, videos, images, graphics, animated graphics, etc.), which includes branded AND unbranded content.



GETTING STARTED

Before getting started, be sure to review the [Equis Financial Branding Guidelines](#) and [FTC Compliance Guidelines](#). Start with a narrow focus by selecting 2-3 social media platforms, establishing a consistent posting schedule, and creating a consistent tone of voice online. *We recommend starting with the following platforms:*



FACEBOOK

PURPOSE: BUILD
RELATIONSHIPS
AND BRAND
LOYALTY



INSTAGRAM

PURPOSE: BUILD
RELATIONSHIPS
AND BRAND
AWARENESS




LINKEDIN

PURPOSE:
NETWORK
PROFESSIONALLY
& ENHANCE
BUSINESS
DEVELOPMENT



YOUTUBE

PURPOSE: BUILD
BRAND
AWARENESS



Equis Financial's Creative Team is here to help you grow your brand and understand the world of social media! Contact us at creative@equisfinancial.com with any marketing questions, requests, or if you would like to have one-on-one training.



OPTIMIZING YOUR SOCIAL MEDIA ACCOUNTS

COMPLETE INTRO/BIO

Be mindful of word count and use keywords relevant to your business.

CLEAR PROFILE IMAGE

Use a professional image of yourself OR a high resolution business logo.

BRANDED COVER IMAGE

Use a clean image branded to your logo or representative of your personal brand.

LINKS

Include a link to your website, landing page, or LinkedIn account.

CONNECT ACCOUNTS

Connect your Facebook and Instagram accounts for easier cross-posting.

INVITE & FOLLOW

Invite friends to like your accounts AND make sure to follow other industry leaders and relevant businesses.



ENGAGEMENT

Engagement is an extremely useful tool when your goal is to increase brand awareness and build a relationship with your audience. Stronger engagement increases your post reach, which increases your potential to attract new recruits or clients. Engagement is measured by how often people are liking, commenting, sharing, and saving your content. Conversely, your engagement is also influenced by how often **you** are posting, how often people are engaging with **your content**, and how often **you** are engaging with others. *Create content with these questions in mind:*

♡ LIKE

Is this content someone would like? Is it visually pleasing? Is the audience learning something new?

🗨 COMMENT

Is this content buzz worthy? Does it get people talking (commenting) or asking questions?

📌 SHARE

Is this content worth sharing with others? Would my audience find this content beneficial enough to send to someone else?

🔖 SAVE

Is this content valuable enough to save and refer back to?



CREATING & PROMOTING FACEBOOK POSTS

To help you make full use of materials in this Equis Social Media Engagement Guide and the [Equis Branding Materials Library](#), here are helpful guides from Integrity Marketing Group on how to create ads and promote posts on Facebook.

CREATING AN AD



PROMOTING AN AD





CREATING CONTENT

Creating your own content does not have to be stressful! Here are a few ideas, catchy headlines, and caption starters for you to expand on to grow on social media!

SHARE YOUR STORY

EDUCATIONAL CONTENT

INSPIRATIONAL QUOTE

INFOGRAPHICS

TIPS & TRICKS

ANSWER FAQ'S

NEW PRODUCTS

NEW CARRIERS

BUSINESS TOOLS

FUN FACTS

INDUSTRY ARTICLE

PROMOTE YOUR SERVICES

- *"The one thing nobody tells you about ____."*
- *"Key benefits of ____."*
- *"Why not all ____ are created equal."*
- *"Reasons you should care about ____."*
- *"A new way to think about ____."*
- *"(#) Questions you should always ask before ____."*
- *"____ tips for beginners."*
- *"Smart ways to ____ that you'll wish you knew sooner."*
- *"____ vs. ____: Which is really better?"*
- *"Tag a friend who ____."*
- *"(#) Simple ways to improve your ____."*
- *"(#) Reasons why I chose ____ and why."*
- *"Behind the scenes: How to ____."*



DESIGN TIPS

Equis Financial provides an abundance of graphics (branded and unbranded), videos, stock photos, and more in the [Equis Branding Materials Library](#) found on Training Center. This library is continuously growing with content added regularly, however if you choose to design your own content, here are a few tips to keep in mind!

TEXT/COPY Enhance readability by sticking to 1-2 legible fonts, by making sure text does not get lost on a photo, and by using font colors opposite of background colors (light text on dark background and vice versa).

MEDIA Catch viewers attention with images or videos that match your topic or call to action. Another great FREE stock photo resource: unsplash.com.

COLORS Choose your company colors and use them consistently!

DESIGN PROGRAMS There are many design programs that you can utilize to create your own social media content. The programs vary by expertise. For more experienced designers, or those hoping to grow their knowledge on the most widely used design programs, we recommend the [Adobe Creative Suite](#). For less experienced designers, we recommend using Internet-based programs such as [Adobe Spark](#), [PicMonkey](#), or [Canva](#).



POSTING ON SOCIAL MEDIA

- Post content 1-3x daily
- Check post spelling and grammar
- Include a relevant image or video
- Use at least 1-2 hashtags
- Use a friendly tone and voice that connects with your audience
- Ask questions and engage
- Mention other people or pages by typing the “@” symbol before typing their name



SCHEDULING & ANALYTICS

Unsure about how to keep track of and manage your social media accounts? Here is a breakdown of daily, weekly, monthly, and quarterly duties for you to stay up-to-date!

EVERY DAY

ENGAGE! Reply to comments and questions, check your messages, comment on other posts, monitor your brand mentions and react to them.

EVERY WEEK

Track your results from the previous week. Identify your best performing posts. Create a tentative posting outline for the week.

EVERY MONTH

Review monthly analytics to identify and integrate previous successes into your weekly posting outline. Research upcoming news and events that can be used to promote your business.

EVERY QUARTER

Review and evaluate last quarter's analytics. Make sure your brand is consistent across all platforms and conduct an audience analysis to ensure you are targeting your intended audience.



HASHTAGS

Hashtags are a way to easily group and compile social media content with similar content such as specific topics, events, keywords, phrases, holidays, etc. in order for users to discover more posts on related content. Hashtags are the pound sign “#” followed by a word or phrase with no punctuation or space between words.

#EquisFinancial #TheAgentsCompany #StayHungryStayHumble #EquisTough #EquisNation
 #IntegrityMarketingGroup #BuildersBoost #TheEquisSystem #TheEquisPlatform #SalesManager
 #RegionalManager #EliteProducer #EquisWhy #VirtualSales #VirtualCareer #CEO
 #MortgageProtection #FinalExpense #LivingBenefits #Retirement #EquisRetirementSolutions
 #LifeInsurance #SalesTraining #CoreValues #Respect #Ownership #Relationships #Attitude
 #Humility #Toughness #PartTime #FullTime #DebtFree #WorkFromAnywhere #Business
 #Entrepreneur #BusinessOwner #BusinessOpportunity #BusinessGrowth #Motivation #Mindset

DO'S & DON'T'S FOR POSTING



DO'S

- **General descriptions of the Equis Opportunity.**
Examples: #insuranceagent, #insurancebroker, #insurancetips, #salesmentor, #telesales, #workyourownschedule, #protectfamilies
- **Praising agents for non-monetary successes.**
- **Training videos without making any claims about earnings/issued paid/how you can make money; and without comparison to other opportunities.**
 - Examples: Information about products, information about how to replace policies, information on how to on-board and how to contract, information about how to build a business, ideas for good work habits without suggesting that results are guaranteed or likely.
- **Stories about connecting with people/families and serving people/families.**



DON'T'S

- **Anything about earnings or profits that you or someone else has made, can make, or want to make.**
Examples: Images of check deposits, lists of producers and amounts they've earned, interviews where producers say what they've earned, phrases such as: "You are able to make thousands of dollars from anywhere in the world!", "____ made me a millionaire!", "My goal is to make 1 million this year.", "I'm going to show you how to make a lot of money.", "I'm going to buy leads, set 30-40 appointments, and make 10k a week."
- **Any specific amount of "issued paid" you or someone else has received, can make, or want to make.**
 - Examples: Photo or name of agent followed by issued paid or sales number, lists of producers and amounts they've issued, noting how you or someone else is performing such as: "And he's already halfway to \$30K this month, in two weeks." or "I know we have people doing 100 grand a month.", asking an agent how much an agent did in sales/issued paid such as: "I think your biggest year was \$693,000, is that right?" or "You issued \$30,000 last month?"
- **Anything about bonuses paid out.**
Examples: "___ paid out \$3.5 million in bonuses last month."
 - *NOTE: This might be considered deceptive because it does not disclose how many people received bonuses and how many people did not.*
- **Any image of or reference to Equis' promotional guidelines.**

DO'S & DON'T'S FOR POSTING

⊗ DON'T'S (CONTINUED)

- **Anything that suggests that you can make more at ____ rather than at another IMO or another job.**
 - "Examples: "In ONE DAY he made what some make in an entire year.", "I joined __ after working for another IMO and the commissions are 'night and day.'"
- **Incomplete statements about how the commission structure works and/or how ____ has the "highest comp."**

Examples: "Starting commission 90-145%", "Comp up to 145%", "High profitability/145% commission", "HIGHEST COMPENSATION: Highest compensation in the industry, starting 95%, and ability to earn up to 145%. PLUS bonuses on top of that."

NOTE: These are misleading because commission % applies to particular products, there is no guarantee a person would be selling those specific products, or that they would be successful; bonuses are not typical for everyone.
- **Anything that suggests that working with __ will change your financial situation.**
 - Examples: #financialfreedom, "change your situation", "I went from -\$10,000 to when I got started to debt free & __ made me a millionaire.", "90% of Agents came from other industries with no prior experience and have seen massive success with ____ following the steps of top producers.", or suggestions you can build "generational wealth."
- **Any suggestion that "anyone can do this."**
 - Examples: "You can be next!", #anyonecandothis, "Anyone can do this if they put in the work."
- **Any suggestion that you will succeed.**

Examples: #winwith____, #OpportunityUnlimited
- **Any suggestion that agents can be profitable with continued investment into leads.**
 - Examples: "If you just keep doing it, it's going to pay off.", "Continuing to invest is key.", "It's a numbers game.", "For 100 leads, I know for me personally, I can take that investment and book 15 appointments and I let the numbers do the job.", "You know the numbers always work out.", "Buying leads is printing money."
- **Any suggestion that an independent agent is an employee.**

Examples: #jobs, #joinus!, "Looking to hire...", "We are hiring!"
- **Ineffective disclaimers.**
 - Examples: "Disclaimer: this is not a promise.", "Disclaimer in case my attorney's watching or something.", "And, as a disclaimer, do not listen to me."