



Social media has changed how people and businesses interact and promote themselves. Throughout this guide you'll find tips and information for each of the most popular social media platforms.

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## Why Social Media?

Your audience is using social media and as generations shift how they interact it is important to meet them where they are at. In fact, 72% of the U.S. population uses some kind of social media platform.<sup>1</sup>

## Your Customers are on Social

- LinkedIn has 90 million senior-level influencers, and 63 million are in decision-making positions.<sup>2</sup>
- 53% of consumers say they're likely to buy from brands that are transparent on social.<sup>2</sup>
- 49% in the market for an advisor say they would research prospective advisors on social platforms.<sup>3</sup>

## Where do you begin?

Don't go into social media thinking you need an account on every social media network. Take a moment and understand where your current and potential clients are likely spending their time.

Before you start evaluating which social media network you want to have an increased presence on think about your goals.

- What is it you want to achieve on social media?
  - Is it to grow your professional network with prospects you can easily message?
  - Do you want to increase awareness of your services in your local community to young families?

Once you have the main goal identified you then are set to lay out some objectives. For example, I want to have 50 followers on my Facebook page by the end of the year.

We've provided brief points for each network that will be covered in more depth in the following pages.



### Facebook

- Can be effective for reaching older millennials and those with families.
- Affordable and easy to use advertising.



### LinkedIn

- Professionals and business owners are more likely to be active on this network.
- It is easy to grow your network and establish digital rapport before messaging prospects.



### Twitter

- Quick and timely updates but can be easy to get lost in the feed.
- Many users look for authentic brands and ones that play into the culture of the social network.



### Instagram (not approved for representatives of AIC/AAS)

- A visual platform with limited linking capabilities.
- The ideal platform for reaching a younger audience with informative and relatable content.

<sup>1</sup> Pew Research Center: <https://www.pewresearch.org/internet/fact-sheet/social-media/>

<sup>2</sup> Sprout Social <https://sproutsocial.com/insights/social-media-statistics/>

<sup>3</sup> 2020 Insurance Barometer Study <https://www.limra.com/en/research/research-abstracts-public/2020/2020-insurance-barometer-study/>

**69%**  
of U.S.  
adults use  
Facebook.<sup>4</sup>



## Facebook

Over the years Facebook continues to evolve and is now one of the most popular social networks in the world. The focus continues to be around friends and family, so it is no surprise that authentic and lifestyle content performs the best for Facebook pages. You are likely part of the 71% of U.S. adults that use Facebook<sup>5</sup> for your professional presence. We recommend a Facebook business page which will unlock metrics and advertising capabilities.

Use these tips to optimize your Facebook strategy:

- Use keywords in the about section and page name.
  - Use your full title, Jordan Smith, Insurance Agent – J&K Wealth Management, instead of Jordan Smith.
  - If you offer specific insurance products in a metro area include those details. E.g. Offering wealth management services (life insurance, securities and retirement strategies) in the Eugene, Oregon area.
- Strike a balance with automated campaigns.
  - Make sure you're not relying only on automated campaign messages through [vendors](#) or the [Ameritas automated marketing](#) campaigns as they typically focus primarily on product topics. Lifestyle content that showcases your personal side and happenings in the office is an important component to balance out the content mix.
  - Share office updates and include office staff in pictures so current and potential clients can begin to strengthen their sense of relationship with you and the agency.
- Stay consistent with your content.
- Try to post 2-5 posts per week of quality content that is a mix of products & services information and lifestyle content.
- Canva.com is one of many free tools that can help design and crop photos.
- Looking to expand your knowledge more? Level up your skills with [Facebook Blueprint](#).

## Facebook SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
Best platform to reach majority of people in the U.S.	A lot of content being shared, it can be easy to have page posts lost in news feed.	You can build a strong community following with the right content and engaging with your audience. <b>Remain authentic!</b>	Changing privacy regulations is creating a higher barrier to entry for more advanced advertising options.
Superior ad platform for usability, targeting options and cost effectiveness.	When using ad targeting the job title selection isn't as accurate as LinkedIn when targeting business owners.	Host and promote events from your Facebook page.	Public perception and trust with how data is being managed and used.

<sup>4</sup> Pew Research Center: <https://www.pewresearch.org/internet/fact-sheet/social-media/>

<sup>5</sup> Pew Research Center: [https://www.journalism.org/2019/10/02/americans-are-wary-of-the-role-social-media-sites-play-in-delivering-the-news/pj\\_2019-09-25\\_social-media-and-news\\_0-08/](https://www.journalism.org/2019/10/02/americans-are-wary-of-the-role-social-media-sites-play-in-delivering-the-news/pj_2019-09-25_social-media-and-news_0-08/)

**49%** of U.S. adults making over \$75,000 a year use LinkedIn.<sup>6</sup>



## LinkedIn

LinkedIn has positioned itself as the best social platform for professionals due to its resume like profile structure and networking culture. Unlike Facebook, LinkedIn does better reaching white collar professionals but that doesn't mean authentic lifestyle content performs poorly. In recent years, there has been a shift in content on LinkedIn towards more lifestyle and personal updates. LinkedIn leverages both personal profiles and business pages, the personal page is good for prospecting, recruiting and general use and a business page is best for agencies and advertising needs.

Use these tips to optimize your LinkedIn strategy:

- Use keywords in the about section and when adding descriptions to your job history.
  - Use an accurate job title in your headline and avoid using unclear headlines such as “Helping you plan for a successful future”.
  - Throughout your profile incorporate your planning specialties and experience.
- Try out what you can search for free before upgrading to a premium account.
  - Search for a person or job title in the search bar and click search, a banner under the search field will appear. Click on “All Filters” and begin to narrow your audience by additional filters, all for free.
- Your content goes farther on LinkedIn than any other social network.
  - The frequency in your automated campaigns can be scaled back on LinkedIn due to the lack of volume of content being shared on the network.
  - As mentioned earlier, lifestyle content has become popular over the years on LinkedIn. Be sure to use unique and authentic photos and updates between your business and industry posts.
  - Since your content goes farther you can aim to post 1-3 times a week.

## LinkedIn SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
Easy to connect users you share a connection with and begin a conversation about a shared interest or common connection.	Expensive to advertise.	Posts from personal profiles are typically preferred in the timeline over company updates. Since your personal profile can be used professionally, unlike Facebook, this is an advantage.	Continued public perception of LinkedIn being a social network for job seekers.

<sup>6</sup> Pew Research Center: <https://www.pewresearch.org/internet/fact-sheet/social-media/>

**80% of tweets come from 10% of Twitter users.<sup>7</sup>**



## Twitter

Twitter has many communities within the platform that are very active and engaged, if you can tap into that community it can be a very successful platform. Twitter users are looking for transparent and culturally relevant brands to follow more than any other social network.

Use these tips to optimize your Twitter strategy:

- Use keywords in your bio that align with your planning specialties and experience.
  - Adding your location and website will help your overall organic rankings with your Twitter profile in Google search.
- Follow and engage with users that have followers similar to your target audience.
  - Go beyond liking their updates and begin replying and engaging with the larger conversation to build up visibility with their audience.
- Be tuned into the people you follow on Twitter, and ready to provide a timely reply or send new tweet.
  - Quick timing on your reply or your new tweet can help ensure your message is still relevant. Remember the famous tweet from Oreo during the Super Bowl power outage?
- Aim to post 3-5 times a week with retweets and replying to other tweets helping increase that number beyond 5.

## Twitter SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
Advertising to accounts using keywords in their tweets. The only social network that has this capability.	Continues to battle bots/ fake accounts.	Highly engaged communities within the platform that you can tap into.	A platform with many users commenting and engaged in politics could cause many users to switch which social media network they use.

<sup>7</sup> Pew Research Center: <https://www.pewresearch.org/internet/2019/04/24/sizing-up-twitter-users/>

**37%**  
of U.S.  
adults use  
Instagram.<sup>8</sup>



## Instagram

Instagram started out as a very simple photo sharing app and has now grown to over 1 billion monthly users. In recent years, there has been a shift of the types of content shared on Instagram due to many younger users now turning to Instagram over Facebook.

Use these tips to optimize your Instagram strategy:

- Use keywords in your bio that align with your planning specialties and experience.
  - Adding your location and website will help your overall organic rankings with your Instagram profile in Google search.
- Find profiles that your target audience typically engages with and begin to analyze what types of content resonates with the audience.
- Hashtags tie you into a larger community of people using that same hashtag. Use this to find users with similar interests in the topics you're discussing and begin to engage with them. You might be surprised how a simple comment can gain you the exposure needed to build a following.

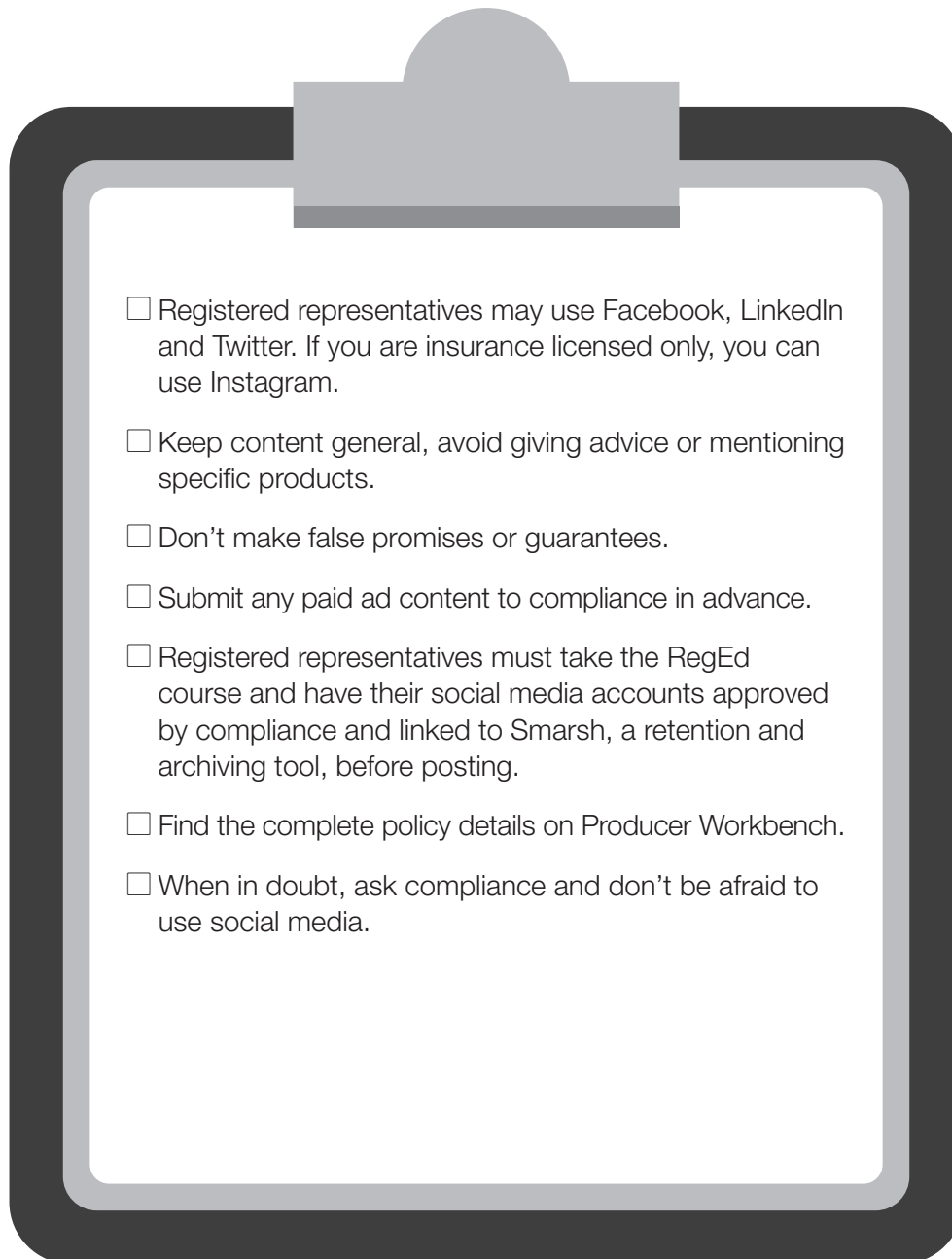
## Instagram SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
Instagram is a great platform to market to a younger audience, 67% are under the age of 28. <sup>9</sup>	You cannot add links to individual posts only a single link within your bio. There are vendors that allow you to easily link posts in your bio to get around this roadblock.	Instagram stories has over 500 million people using the feature every day. It allows users to share updates and information that disappears in 24 hrs but can be pinned and categorized later in your profile.	Facebook owned and possible negative user perception of that association.

<sup>8</sup> <https://www.pewinternet.org/fact-sheet/social-media/>

<sup>9</sup> Hootsuite: <https://blog.hootsuite.com/instagram-statistics/>

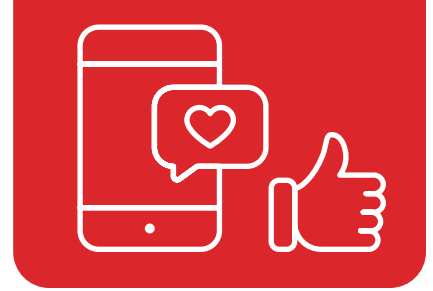
## Social Media Tips in a Regulated Industry



- Registered representatives may use Facebook, LinkedIn and Twitter. If you are insurance licensed only, you can use Instagram.
- Keep content general, avoid giving advice or mentioning specific products.
- Don't make false promises or guarantees.
- Submit any paid ad content to compliance in advance.
- Registered representatives must take the RegEd course and have their social media accounts approved by compliance and linked to Smarsh, a retention and archiving tool, before posting.
- Find the complete policy details on Producer Workbench.
- When in doubt, ask compliance and don't be afraid to use social media.







## Measuring Success

One of the many benefits of social media is the ability to measure your success. Each platform provides you with insights, use these to begin to benchmark your performance. If you're looking for overall engagement you will be able to see how many likes, comments, shares and clicks you've received on a post.

Social media metric definitions:

- **Engagement rate:** Most social channels calculate engagement rate by the number of actions on a post divided by the impressions.
- **Click through rate (CTR):** Calculated as clicks divided by impressions.
- **Impressions:** The number of times someone has seen your post, one person can have multiple impressions.
- **Reach:** The number of unique people that saw the post.
- **Views:** Each social network calculates views differently, but it typically takes around 3 seconds of the video watched to count as a view.
- **Cost per lead (CPL):** Calculated as cost spent on advertising divided by number of leads.

## Social Post Checklist

When considering a piece of content for social media, there are a few questions you should consider before you hit that post button.

- What's in it for your audience?
- What do I want the user to do?
- Is there an opportunity to add a call to action to gain a lead on your website?
- Is it easy to read and understand?
- Is the information trustworthy and accurate?

Now that you've answered all four questions, you're good to go ahead and post!



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