



# BEST PRACTICE

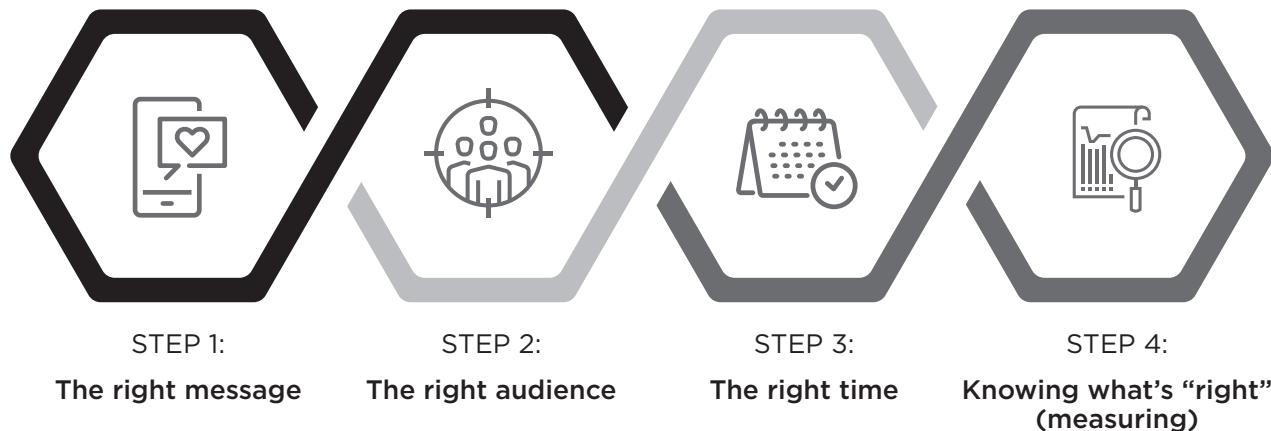
## FOR USING SOCIAL MEDIA TO RECRUIT AGENTS



Social media has reach! In 2023, over 84% of U.S. adults used social media.\* The average time spent on social media per day is 2 hours and 23 minutes.\*\* To effectively harness this massive audience to recruit agents and grow your business, you need to know how to use Facebook, LinkedIn, YouTube, and Instagram effectively. The following guidelines can help.

**NOTE:** Your social media business content needs to be compliant according to CMS guidelines. Follow best practices and have content approved by your compliance team before posting.

## THE RIGHT STUFF



\*<https://blog.hubspot.com/marketing/fastest-growing-social-media-platforms> Retrieved from Hubspot, June 2024  
\*\*<https://datareportal.com/social-media-users> Retrieved from DataReportal, June 2024

# 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 agents would want to become part of your organization. That list may look something like:

1. We support our agents with unique resources and back office support that allow them to focus on their business
2. We offer training opportunities and mentoring for agents to learn as they grow
3. Our experience helps both new and seasoned agents with their personal goals

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	Streamline learning and development
State-of-the-art marketing technology	Simplify agent workflow
Training opportunities	Feel supported as you grow

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 carousel on Instagram showing the benefits of being an agent for your FMO
- A short video post talking about the unique features of your firm and how it helps agents
- 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 why they love working at your firm

Remember: In your posts and agent testimonials, avoid anything that refers to commissions and earnings. Always have your posts approved by your compliance team before posting.

**Pro Tip #1:** 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



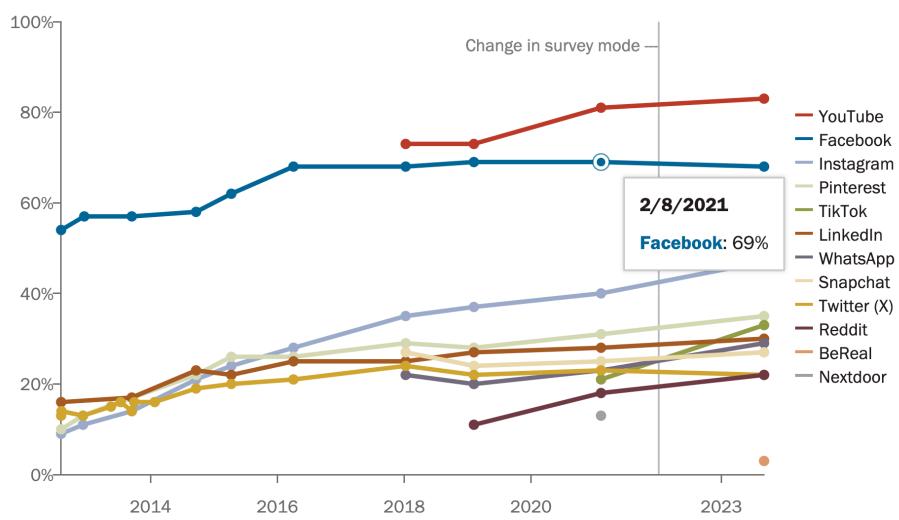
Once you have your message down, you need to deliver it to potential agents. This starts with knowing your audience by looking at and analyzing demographic and psychographic information.

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.

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.

### Which social media platforms are most popular

% of U.S. adults who say they ever use ...



Note: The vertical line indicates a change in mode. Polls from 2012-2021 were conducted via phone. In 2023, the poll was conducted via web and mail. For more details on this shift, please [read our Q&A](#). Refer to the topline for more information on how question wording varied over the years. Pre-2018 data is not available for YouTube, Snapchat or WhatsApp; pre-2019 data is not available for Reddit; pre-2021 data is not available for TikTok; pre-2023 data is not available for BeReal.

Respondents who did not give an answer are not shown.

Source: Surveys of U.S. adults conducted 2012-2023.

Source: PEW Social Media Fact Sheet, 2024

**Pro Tip #2:** 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 more important to be relatively consistent rather than post a specific number of times or to post just for the sake of posting. For example, posting weekly or daily most of the time is fine. Avoid taking a break for weeks or months and then returning to post daily for awhile.

For general tips by platform,\* here's some guidance:



Facebook  
1-2 per day



Instagram  
3-5 per week



Instagram stories  
1-3 per day



LinkedIn  
1-2 per day



Twitter  
2-3 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 #3:** 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.

\*<https://blog.hootsuite.com/how-often-to-post-on-social-media/> Retrieved from HootSuite, June 2024

## 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



12-3 PM

12-3 PM

3-6 PM

12-3 PM

Publishing content when audiences are online will help drive higher engagement. Use the chart above as a guide.

**Pro Tip #4:** 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 four main types of social media content that will help you put variety into your communications.

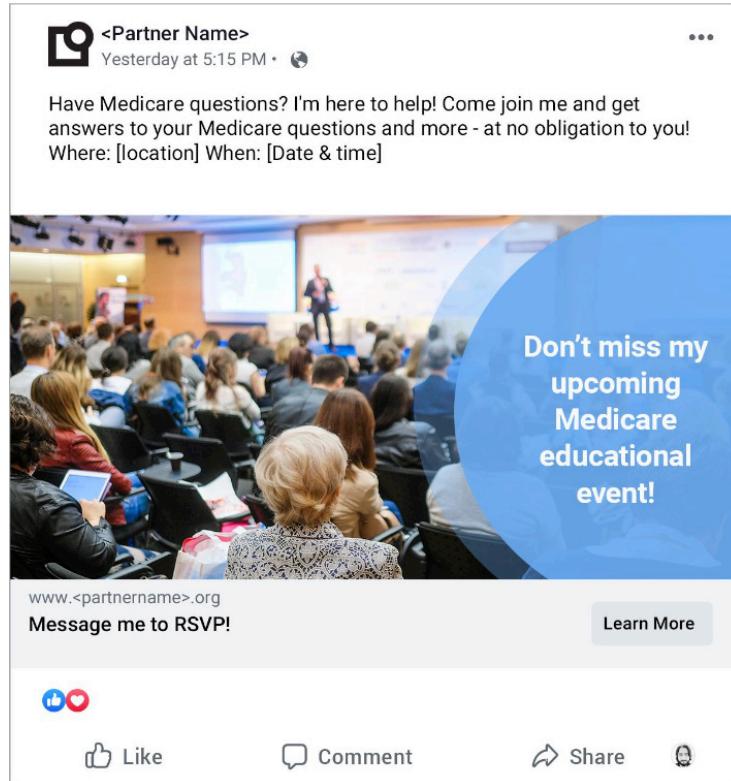
### 1. Resourceful Social Content

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:

- Tease your audience by using a question that your resource answers
- Summarize the key message that the resource delivers

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 #5:** 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 an Integrity-created post aimed at helping agents engage with their clients.

## 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.

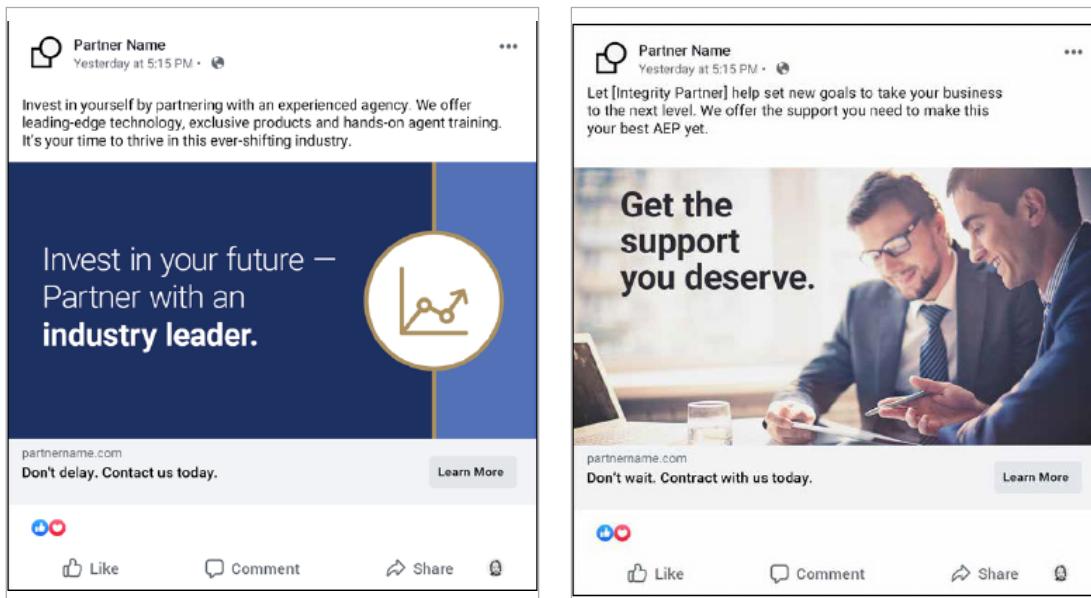


Above is an example of a quote from Integrity's CEO Bryan W. Adams on their social media platform.

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.



Above is an example of agent recruitment posts created by Integrity for Partners to either use on their organic pieces or 'boost' / 'promote' to 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

Most than most platforms, Facebook is pay-to-play. Consider putting some money behind your Facebook content, we suggest 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. You can let Facebook select the most relevant goal based on your settings, or choose manually.

Step 3: Target your audience (optional). You can select audience based on qualities like age, gender, location and interests.

Step 4: Identify budget and duration of promotion.

Step 5: Confirm your payment information and click “Boost Post Now.”

NOTE: Learn more about boosting Facebook posts here:

<https://www.facebook.com/business/help/347839548598012>

**Edit Audience**

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

**Gender**

All Men Women

**Age**

18 65+

**Locations**

Locations Type to add more locations

United States United States

Map of the world showing location targeting options.

**Detailed Targeting**

Detailed Targeting Life insurance [Browse](#)

Interests Insurance Life insurance

Demographics Independent Insurance Agent Life Insurance Agent

Insurance Specialist Insurance

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.

Specific Broad

Cancel Save Audience

# Using Social Media for Agent Marketing

## STEP 4: KNOWING WHAT'S WORKING



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. Identifying Your Goals

#### 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.

#### 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.

#### 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. Metric Overview: KPIs

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.

### 4. Use Insights from each social media platform

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

**Pro Tip #6:** Investing in a third-party social reporting app, like Hootsuite or Hubspot, will provide you with much more information than social platforms can.

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

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

The screenshot shows the Facebook Business Manager Insights interface. The left sidebar includes options like Overview, Ads, Followers, Likes, Reach, Page Views, Page Previews, Actions on Page, Posts (selected), Branded Content, and Events. The main area is titled "All Posts Published" and displays a table with columns: Published, Post, Type, Targeting, Reach, Engagement, and Promote. The table lists five posts from May 19, 2020, with metrics such as Reach (e.g., 60, 88, 139, 1.6K), Clicks (e.g., 0, 3, 2, 3, 5, 13), and Engagement (e.g., 190, 117). Each post has a "Boost Post" button.

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

The screenshot shows the Instagram Insights interface. The left sidebar includes options like Settings, Archive, Insights (selected), Your Activity, Nametag, Personal Information, Saved, Shopping Bag, Close Friends, Discover People, and Open Facebook. The main area is titled "Posts" and shows a grid of 57 posts and stories from the week of May 12-19, 2020. Each post has a thumbnail, a like count (e.g., 359, 356, 347), and a caption. The interface also shows overall metrics like 470 profile visits in the last 7 days and 111, 645, 171 for the week.

## LinkedIn: Access these metrics in LinkedIn’s “Analytics” menu option

The screenshot shows the LinkedIn Channel Analytics interface. The left sidebar includes options like Overview, Reach, Engagement (selected), Audience, and ADVANCED MODE. The main area shows engagement metrics: Watch time (hours) at 80.0 (down 25%) and Average view duration at 0:38 (down 2%). Below these are line graphs for Watch time (hours) and Average view duration over time (Jun 9, 2020 to Jul 6, 2020). A summary section at the bottom shows "1 video published" on Jun 16, 2020, with a thumbnail for "Episode 39: Chad Milner – Who You Kn...".

**Pro Tip #7:** 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.

Want more insights? Meta has a resource on Facebook and Instagram advertising here: <https://www.facebook.com/business/help/169249477193317>

## 5. 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 #8:** 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).



## Social Media Post Standards at a Glance

Every social media platform has “best practices” for post content and length. These are subject to change, but can be used to compare one platform’s “style” against others when deciding on your content.



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 Search, Feed and Marketplace ads: 1080 x 1080 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	Post: 1200 x 627 Sponsored Carousel: 1080 x 1080	800 x 800
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

\*No matter your hashtag strategy or posting frequency, above all: Focus on quality and relevance, and test, test, test to determine what works best for your audience.

Source (image sizes): <https://blog.zuuv.com/marketing-insights/social-media-banner-size-cheat-sheet>

Source (post guidelines): <https://influencermarketinghub.com/best-length-for-social-media-posts/>

## 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).

## 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 targeted audience who do not already follow your account, 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.

- A. 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.
- B. 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.
- C. Impressions: The total number of times your ad was seen.
- D. Organic social content: Social content you post to your social media platforms.
- E. Promoted content: See "Boosted content."
- F. 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).
- G. 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.
- H. Social media monitoring: Finding and assessing what is being said about a specific topic, like your company, product or industry.
- I. Split testing: See "A/B test."
- J. 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.
- K. Stories: A form of social media content that disappears after 24 hours. Stories can be posted to Snapchat, Facebook and Instagram.
- L. 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.
- M. 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.
- N. 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.
- O. UGC: User-generated content, social content that is created by users of your products, services or your social media audience without you 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.
- P. 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).