



*TAKING THE NEXT STEP IN
YOUR INSTAGRAM USE*

INSTAGRAM 201

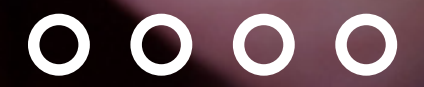




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After going through this course, you'll know many of the best practices needed to run a Instagram page for your business.

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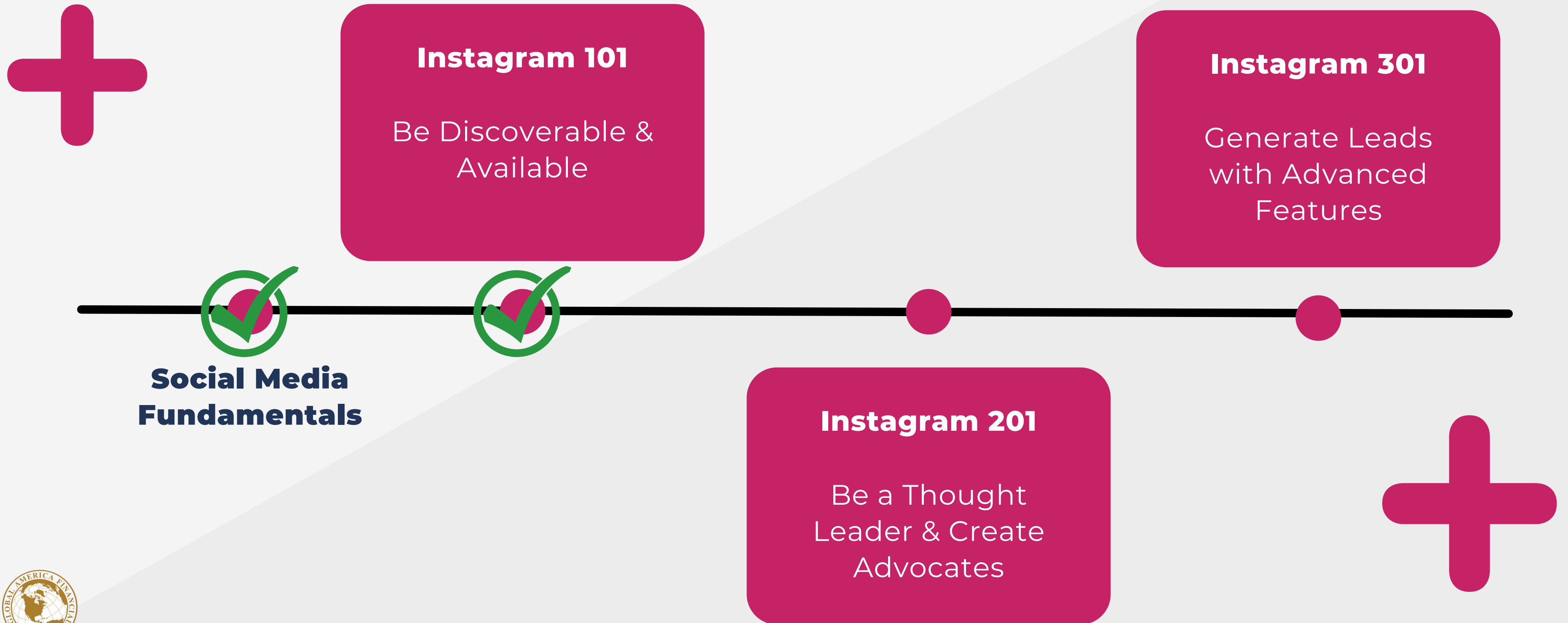
BEING A THOUGHT LEADER

SHARING CONTENT THAT
CREATES ADVOCATES



SOCIAL MEDIA GOALS

When considering social media's use in the financial services industry, there are three things we're trying to achieve. After going through our Fundamentals and Instagram 101 courses, you've become Discoverable and Available. Now, we need to focus on content to become a thought leader.





CONTENT IS KING

CREATING SMART CONTENT



NAVIGATING THE WORLD OF INSTAGRAM

The first thing we need to consider when running a social media account is content. Content is what will inspire users to follow you. It's the key to success. If the content you create doesn't entertain or provide value to your followers, your content will be ignored. #ItsAllAboutTheContent

So before posting anything, first ask yourself "would my followers care about this content?" In order to win the attention war and create content that's truly "thumb-stopping", one must remember the following ...





CONTENT TYPES

With that in mind, let's look at the kinds of content we can post. In general, there are two types:



SHARED CONTENT

Companies like GAF and carrier partners are constantly publishing social media posts — often linking back to valuable articles. If you find a piece of content you like, share it out to your followers. Make sure to check with your legal council to determine approved authors for sharing, as well as your ability to alter the post when publishing.

First, you can simply share that content as part of your “story” by clicking the message icon.



Second, you can “regram” the content by posting it to your own account. Simply screenshot the post, crop that screenshot so only the photo remains, post the photo with the same copy as the original post, and give credit to the original poster by tagging them.



ORIGINAL CONTENT

Content you create yourself is a great way to connect with your followers. Only you know what your individual clients like to learn about, and only you can showcase your personality. We advise getting this content approved by your legal team prior to publishing.



CONTENT BEST PRACTICES

Whether you're sharing or creating, there are a few best practices to keep in mind when it comes to publishing content:

POST TWICE A WEEK

This allows for multiple opportunities to gain engagement, while not overwhelming your followers. That said, if once a week is less stressful, do that.

ALWAYS INCLUDE A CTA

Whether you're asking your followers a question or telling them to click on a link, a call-to-action (CTA) helps them know what to do.

USE COMPLIANCE-APPROVED CONTENT

Always make sure to get approval on your original content prior to publishing. Want to make your life easier? Try sharing content from the GAF or carrier partner pages. All of that content is already approved.

DON'T POST AT 2AM

Try posting at times your followers might be on their phones. In the morning or during lunch hours are typically good times to hit.

USE HIGH-QUALITY PHOTOS ON INSTAGRAM

Never post something on Instagram with just words. Videos, infographics, and high-quality photos tend to perform well for finance-related content.

TRY TO BE TIMELY

Due to compliance, it can feel impossible to post about timely topics. That's not entirely true. Try posting winter-based ideas in the winter. Or tax-related topics in March. There are always ways to plan ahead.

CONTENT TOPICS

When thinking of content to share or create, think about your followers. By providing them with content they find valuable, you show them you put their interests first. You create a unique experience — which can turn your clients into advocates. Try sharing the following types of content:

PERSONAL CONTENT

Content highlighting you as a person. This could be your hobbies, your family, your personal goals, etc. Making sure your clients know you're human is important too.



EDUCATIONAL CONTENT

Content focused on educating your clients. These posts show that you care about more than people's money — you care about their future



COMMUNITY CONTENT

Content covering your personal experience at a conference or an event you (or your office) are hosting. Showcase your community involvement!



CONTENT TOPICS - PERSONAL

Personal Content is a great way to connect with your followers on a human level and should be prioritized on Instagram. Personal Content can celebrate your successes at work and showcase your family and hobbies. If you receive a new certification, you could post about that as well! Remember to adhere to your compliance and legal guidelines when creating this content.

WHAT NOT TO DO:

- Post about your new fancy car or anything else alluding to your income
- Post or comment on other posts, about religion, politics, or other controversial topics. While you're entitled to your opinion, remember that your account is officially affiliated with your company.



QUICK TIP: When posting content like this, make sure to use a photo in a professional setting. Avoid using actual sales numbers. Instead, speak in a thankful and appreciative tone.

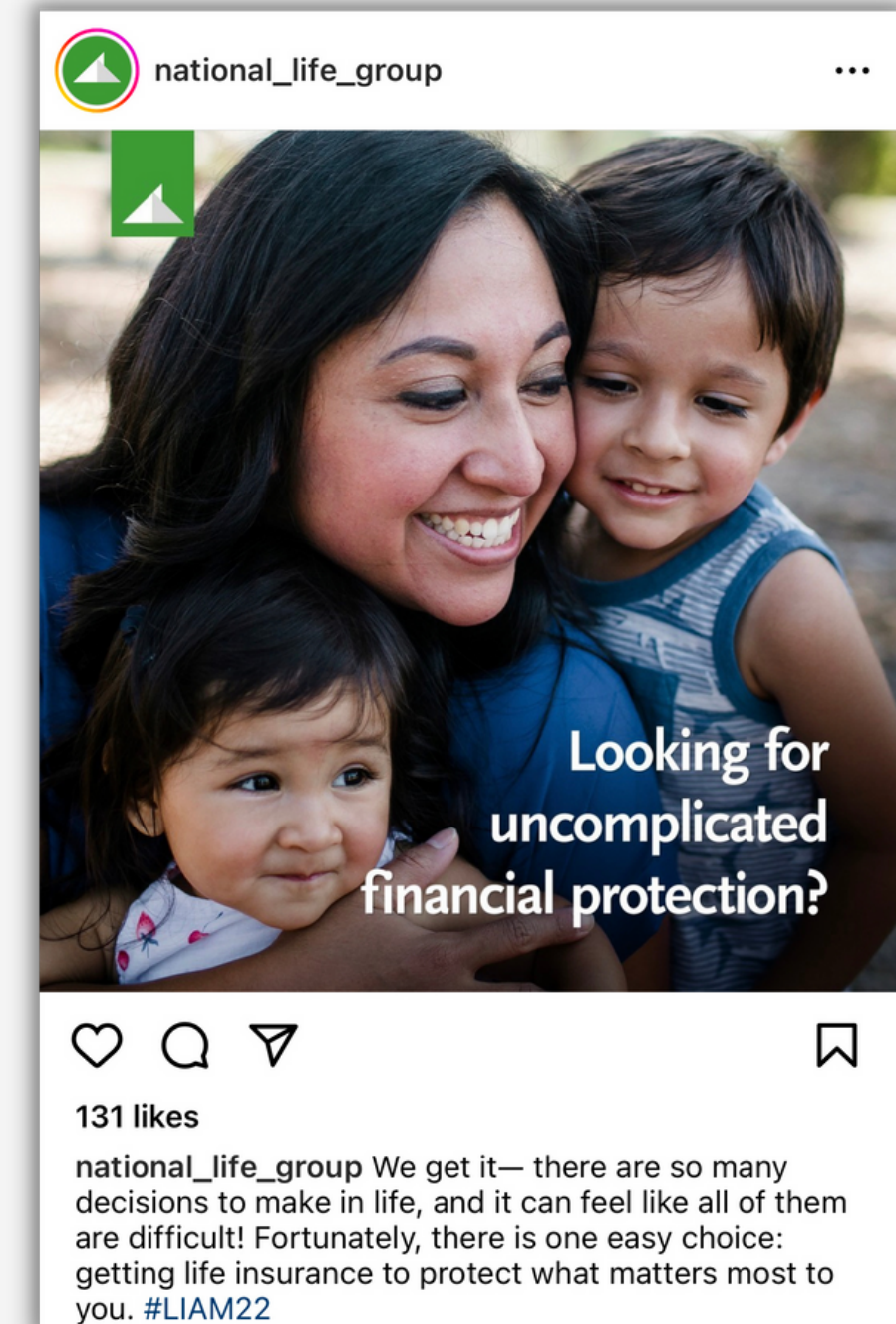


CONTENT TOPICS - EDUCATIONAL

Insurance and finance are complicated topics. By educating your clients, you're not just their agent, you're their financial guru. GAF and carrier partners share educational content frequently. Simply share these posts from the social pages of these companies.

WHAT NOT TO DO:

- Talk about specific products
- Alter the copy of the post you're sharing (unless given approval from your legal team)
- Make promissory statements
- Post without giving credit to the original poster or writer

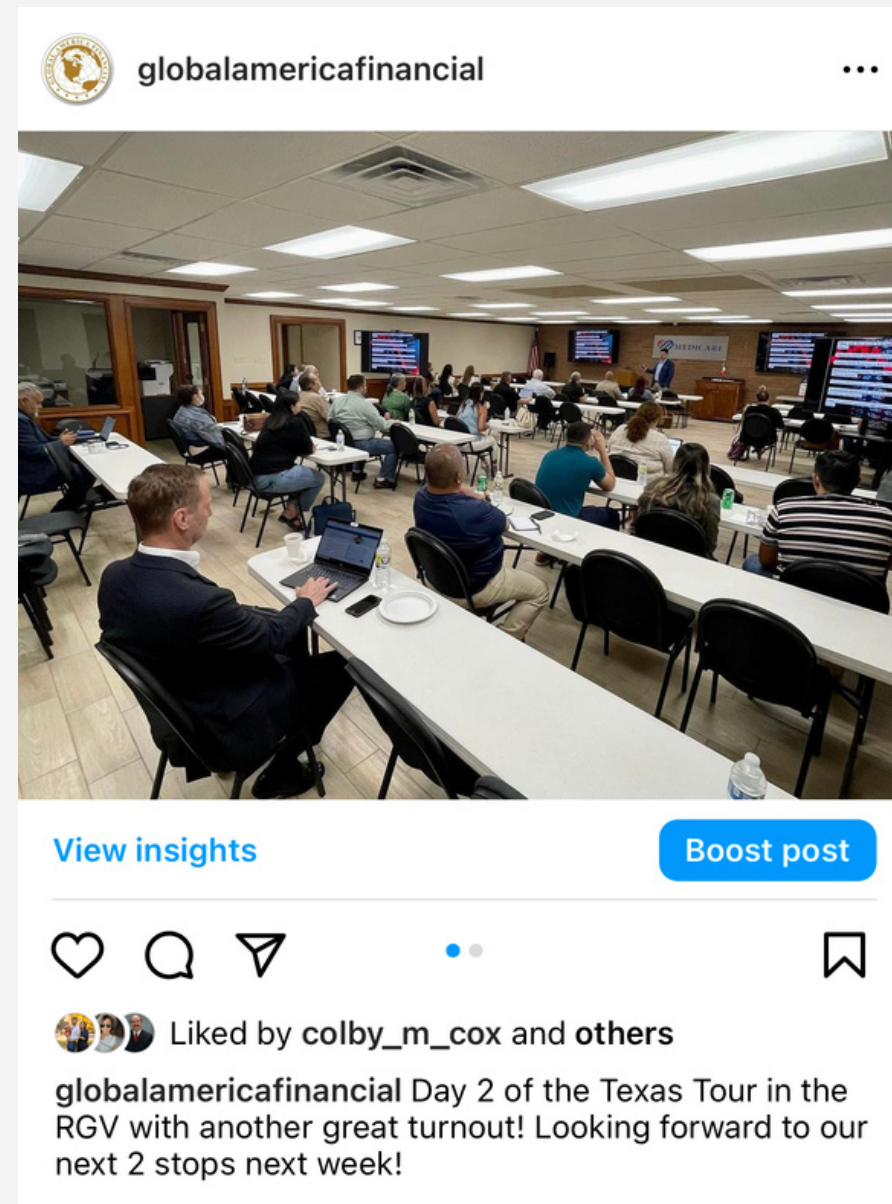


CONTENT TOPICS - COMMUNITY

Event and Conference posts must come from you. Take a picture of yourself at a conference or share a Instagram event for something your office is hosting! Make sure to get it approved first.

WHAT NOT TO DO:

- Post photos of other people without their permission.
- Post slides from any presentation at a conference or convention. Most likely these slides were not approved for public use



QUICK TIP: If you're taking a photo at a conference, make sure to not include any content on presented slides. These posts would be great on LinkedIn.



QUICK TIP: Always make sure the photos you use aren't copyrighted. Use sites like Pexels or Pixabay to find free photos, royalty free. These high-quality photos are great to use on Instagram.





TURNING COMMENTS INTO CONVERSATIONS

THE ART OF COMMUNITY MANAGEMENT



CONVERSATION MANAGEMENT

When your content begins to get engagement, the opportunities to create conversations will arise. These conversations can eventually lead to sales, so they must be taken advantage of. Below are examples of comments you may see:

WARM LEADS

The screenshot shows a social media post from user 'janejefferson95' titled 'DIFFERENCES IN LIFE INSURANCE'. The post compares 'TERM' (Term Life Insurance) and 'PERM' (Permanent Life Insurance) with an 'OR' in a circle between them. It includes a call to action: 'Talk to a financial professional to learn how life insurance types can work for you.' and the Transamerica logo. Below the post are icons for heart, comment, share, and bookmark. A comment from 'john_odde' says 'This is really helpful!' and is highlighted with a red border.

COLD LEADS

The screenshot shows the same social media post as above. A comment from 'tim_johnson @kerry_johnson' is highlighted with a red border.

CLIENTS

The screenshot shows the same social media post as above. A comment from 'kathy_hoeger' says 'You're the best' and is highlighted with a red border.

ANGRY USERS

The screenshot shows the same social media post as above. A comment from 'steph_schmidt' says 'Life insurance is a scam!' and is highlighted with a red border.



CONVERSATION MANAGEMENT - WARM LEADS

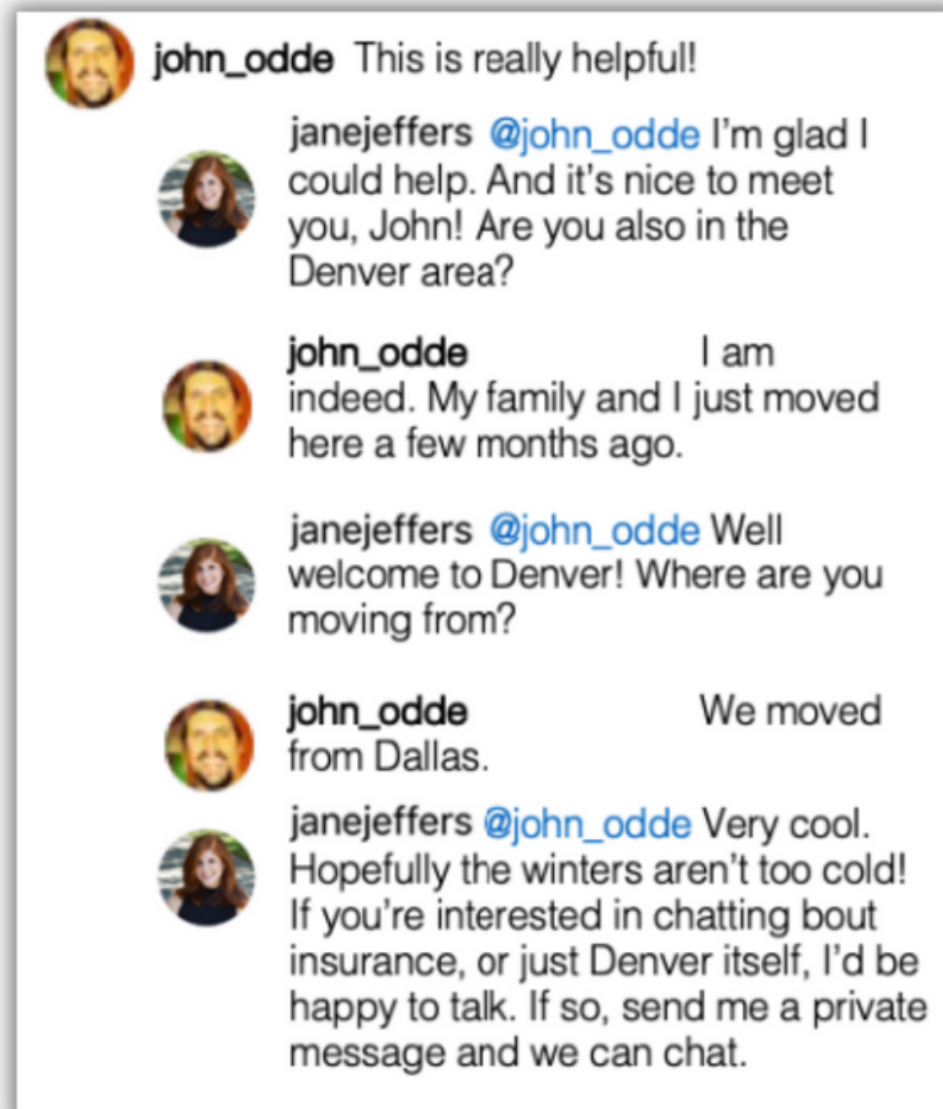
Positive comments or messages coming in from non-clients is the ideal situation. Take advantage! Respond quickly and move the conversation to a place where you can have the most descriptive, effective conversations: email and phone.

EXAMPLE



The screenshot shows a social media post from user janejefferson95. The post features a graphic titled "DIFFERENCES IN LIFE INSURANCE" comparing "TERM" (Term Life Insurance) and "PERM" (Permanent Life Insurance). The graphic includes a central "OR" in a circle. Below the graphic, there is a call to action: "Talk to a financial professional to learn how life insurance types can work for you." and the Transamerica logo. The post has engagement icons (heart, comment, share, bookmark) and a reply from john_odde: "This is really helpful!".

EXAMPLE CONVERSATION



The screenshot shows a social media conversation. It starts with john_odde saying "This is really helpful!". janejefferson95 replies: "I'm glad I could help. And it's nice to meet you, John! Are you also in the Denver area?". john_odde replies: "I am indeed. My family and I just moved here a few months ago.". janejefferson95 replies: "Well welcome to Denver! Where are you moving from?". john_odde replies: "We moved from Dallas.". janejefferson95 replies: "Very cool. Hopefully the winters aren't too cold! If you're interested in chatting bout insurance, or just Denver itself, I'd be happy to talk. If so, send me a private message and we can chat."

KEEP IN MIND...

- Don't sell too hard. People don't want a sales-y agent, they want a neighbor who happens to be an expert.
- Take the conversation off social relatively quickly. Social media is public, and there are many things you can't legally discuss. Move the conversation to email or a phone call.



CONVERSATION MANAGEMENT - COLD LEADS

More neutral comments from non-clients need to be addressed with care. Don't scare them away by pushing a sale too hard. Instead, make them feel seen and heard. If you'd like, let them know you'd love to buy them a coffee for a quick conversation.

EXAMPLE

The screenshot shows a social media post from user janejefferson95. The post features a graphic titled "DIFFERENCES IN LIFE INSURANCE" comparing "TERM" (Term Life Insurance) and "PERM" (Permanent Life Insurance). The graphic includes a central "OR" in a circle. Below the graphic, there is a call to action: "Talk to a financial professional to learn how life insurance types can work for you." The Transamerica logo is visible in the bottom right of the graphic. Below the graphic are icons for heart, comment, share, and bookmark. A comment from janejeffers is visible: "If you're considering life insurance, you may not understand the difference between term and whole life. Transamerica is here to help." At the bottom, a reply from tim_johnson @kerry_johnson is partially visible.

EXAMPLE CONVERSATION

The screenshot shows a conversation between tim_johnson @kerry_johnson and janejeffers @tim_johnson. The conversation starts with janejeffers replying to tim_johnson's comment: "Thanks for commenting, Tim! I'd be happy to help clarify anything. Do you or Kerry have any questions about this?". tim_johnson replies: "I don't have any further questions at this time. Thanks!". janejeffers replies: "No problem. I'm always happy to help. If you or anyone you know has questions about life insurance or financial protection, I'm always happy to chat about it over coffee. I'm buying! ☺".

KEEP IN MIND...

- Address their comment in a customized manner. Don't reply with a canned answer that ignores what they said in the first place.
- Use proper grammar, limit emoji use, and don't abbreviate (lol, thx, etc.).
- Don't overly push. Simply let them know that you're here for them.



CONVERSATION MANAGEMENT - CLIENTS

If your clients respond to you, make sure to create a conversation. By commenting, they're letting you know that they're open to a dialogue. Make sure that openness isn't met with a cold shoulder.

EXAMPLE

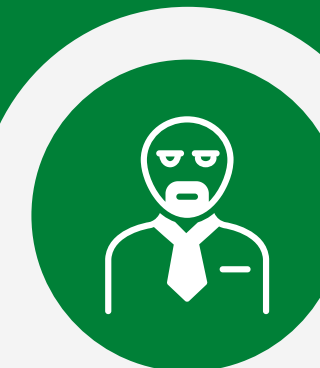
The screenshot shows a social media post from user **janejefferson95**. The post features an infographic titled "DIFFERENCES IN LIFE INSURANCE" comparing "TERM" (Term Life Insurance) and "PERM" (Permanent Life Insurance). The infographic includes the Transamerica logo and a call to action: "Talk to a financial professional to learn how life insurance types can work for you." Below the infographic, there are icons for heart, comment, share, and bookmark. A comment from **janejeffers** reads: "If you're considering life insurance, you may not understand the difference between term and whole life. Transamerica is here to help." At the bottom, a comment from **kathy_hoeger** says: "You're the best".

EXAMPLE CONVERSATION

The screenshot shows a social media conversation. It starts with a comment from **kerry_hoeger**: "Thanks for sharing!". This is followed by a reply from **janejeffers @kerry_hoeger**: "You're welcome, Kerry! I hope you're doing well. How was your trip to Disneyland?". Then, **kerry_hoeger** replies: "Our trip was great! The family loved meeting all the characters. Thanks for asking, Nils.". Finally, **janejeffers @kerry_hoeger** replies: "Of course! I'm glad it went well. And by the way, I have more infographics like this if you felt it was helpful. Just let me know!".

KEEP IN MIND...

- Create a conversation! They proactively reached out to you. Do your part and respond in a way that creates dialogue.
- Don't forget why they reached out. Having the conversation is what relationship building is all about, but make sure you address the fact that they commented on a specific piece of content.



CONVERSATION MANAGEMENT - **ANGRY USERS**

Unfortunately, human nature is to complain. You may get angry users (or trolls) commenting on your posts to vent about something. An internet troll is someone who makes intentionally rude or upsetting statements online to elicit emotional responses in people or to steer the conversation off-topic. Don't return the anger, and don't delete the message unless there is profanity. This is an opportunity to show your followers how you deal with pressure.

EXAMPLE

The screenshot shows a social media post from user janejefferson95. The post features a graphic titled "DIFFERENCES IN LIFE INSURANCE" comparing "TERM" (Term Life Insurance) and "PERM" (Permanent Life Insurance). The graphic includes a central "OR" in a circle. Below the graphic, the user janejeffers has commented: "If you're considering life insurance, you may not understand the difference between term and whole life. Transamerica is here to help." At the bottom of the screenshot, a comment from user steph_schmidt is visible: "Life insurance is a scam!"

EXAMPLE CONVERSATION

The screenshot shows a conversation between two users. User steph_schmidt posts: "Life insurance is a scam!". User janejeffers replies: "@steph_Schmidt Hi, Steph! I'd love to hear why you feel this way. Did you have a particularly bad experience? Send me a message if you'd like to chat." Below this, an "OR" is shown, followed by another reply from janejeffers: "@steph_Schmidt Hi, Steph! Oh no! I'd love to better understand why you feel this way. Feel free to send me a message if you'd like to discuss further."

KEEP IN MIND...

- Take the high road. Every time. Be polite and respectful.
- Get the conversation to a private message. Don't give them an opportunity to continue publically commenting.
- If the user refuses to stop, you have the power to block that user from commenting on your page.
- Most importantly, please refer to your legal compliance guidelines regarding complaints.





INCREASING YOUR ENGAGEMENT

ANALYTICS AND MEASUREMENT
ON SOCIAL MEDIA





MEASUREMENT

Using data and analytics to guide your business is a great way to be successful. While this section will only touch on some of the higher-level concepts, we will be providing a deeper dive into analytics in I301. Make sure to check that out.

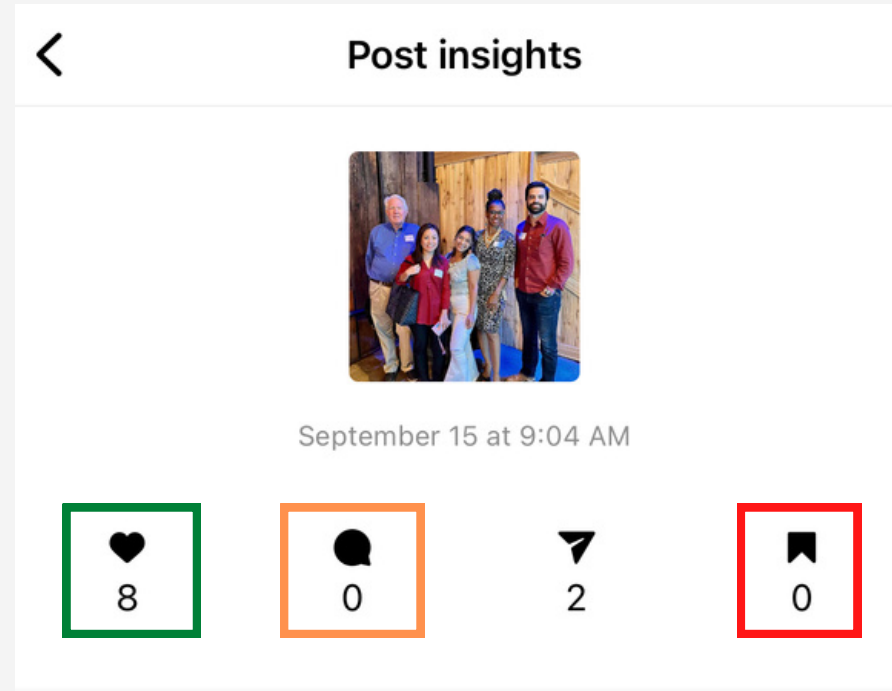
DON'T WASTE YOUR TIME

In marketing, we use data to inform us which messages our audiences react positively to, and which they don't. If you continue to use the same advertisement, and that advertisement isn't working, you're wasting your time. And maybe your money.

YOU DON'T NEED TO BE A MATHEMATICIAN

But don't worry! Looking at Instagram data isn't hard. It's fast and easy. You can easily learn which posts are working and which aren't. Then, simply continue doing the things that work!

Looking at some key numbers will help you understand what's working. Below is an example of a Instagram post, and some of the numbers you should keep track of.



Overview ⓘ	
Accounts reached	45
Accounts engaged	8
Profile activity	0

Reach ⓘ	
45	Accounts reached

VIEWING YOUR ENGAGEMENT

To view the details of your post's engagement, click on View Insights.

POST LIKES

The number of likes users gave the post.

POST COMMENTS

The number of times a user provided their own thoughts to your post.

POST SAVES

The number of times a user saved your post to look at it later and remember it.

POST INTERACTIONS

The number of times a user took certain actions after seeing your post. For example, a user may have visited your profile or a hyperlink in your bio from your post.

POST DISCOVERY

The number of users that found you through the public Discover feed.

POST REACH

The number of unique users who saw this post in their personal Instagram feed.





POST TOPICS



Perhaps posts talking about a certain topic performed better. Did people love when you shared about your family outings? Or when you posted educational pieces?

POST VISUALS



Visuals can make a huge difference on Instagram. Maybe the infographics you shared from GAF or carrier partners did well. Or maybe the videos you're making are your top posts.

POST TIMING



Your followers might be more active at certain times of day. For example, your morning posts might do better than your afternoon posts because your followers are hard at work in the afternoon.

Once you feel comfortable looking at this data, try finding patterns in the posts with higher levels of engagement. There are a few things to look for:



QUESTIONS?

THAT CONCLUDES OUR INSTAGRAM
201 COURSE

If you'd like to learn more about
Instagram, take our Instagram 301
course.

If you ever have any questions,
please feel free to reach out to us!





THANK YOU

Check out Instagram 301 for more!

