

CHUBB®

Marketing tools for Financial
Advisers

5 Ideas for Social Media Content for Financial Advisers



About this guide

Chubb wants to support you to become more proficient with digital marketing. In today's world, managing your online presence is essential part of building and maintaining a sustainable client base and profitable business.

This guide is part of a series designed to help you develop an online presence that aligns to your business and supports your marketing activity. Please use your own discretion when applying the general advice we've provided in this document.

What we cover

In this guide, you'll learn about:

- Getting Social – Why you can benefit from an active social media presence
- Testimonial Content
- Explainer Content
- Seasonal Content
- Thought-provoking Content
- Personal Content
- Testing What Works
- Useful Resources

Getting social - why you can benefit from an active social media presence

Ever done a search on Google and seen a big map show up? That's what we call local search – each of those pins and listings in that Maps section are businesses that have built out a profile on Google, known as Google My Business.

SOCIAL MEDIA ISN'T ABOUT WASTING TIME

Users, along with watching funny videos about cats and liking their friend's baby photo are receptive to relevant, promoted content such as advice. Many of our purchasing decisions are directly influenced by social media like Facebook and Instagram.

BUILD A LONG-LASTING, TRUSTING RELATIONSHIP WITH YOUR FOLLOWING

The key idea in this section is active – a set and forget approach with social media isn't going to grow your following very quickly. You can schedule posts ahead of time using 3rd party social media planning tools (do a quick google search for 'social media scheduling'), and can play around with ideas in Facebook's own Creator Studio – learn about using this tool [here](#).

GROW YOUR AUDIENCE

If you commit to regular posting of information and advice, you'll naturally build up followers as your audience engages with the content enough that other non-followers see it and view it as well. If they like what they see, you can expect to generate new fans.



SOCIAL PRESENCE CAN DRIVE BUSINESS DIRECTLY

When your followers are ready to make an insurance decision, they'll go to someone they trust already – you. This can be responding to a post, or simply just a direct message to your page which can then be moved offline to a proper discussion about their needs.

GET IN FRONT OF NEW POTENTIAL CUSTOMERS QUICKLY WITH ADVERTISING

There's a reason why billions of dollars are spent annually on Facebook advertising. Thanks to Facebook's interest targeting you can speak directly to those who reflect your different customer types – such as those in a life stage looking to buy life insurance. You can learn more about the targeting options in Facebook here.



Testimonial content

What better proof that you provide a valuable service than the recommendations of past clients? Testimonials are still one of the most effective marketing tools available, and for such a people-based business like financial advice, they are essential. Reviews

can live in a number of places – on your own properties like your website or directly within channels like Facebook and Google. Ideally you want a combination of these – social media testimonials are excellent, in-the-moment endorsements that can capture a prospective customer’s attention.

VIDEO TESTIMONIALS

In most cases video enjoys better engagement on social media than any other content format. If you’ve got clients who are happy to participate, a well done recommendation video can bring that extra layer of trust to your brand.

To shoot a video testimonial you don’t necessarily need to spend large to get a usable video asset. But it’s a good idea to have decent lighting, steady shot and clear audio.

Quick tips for video:

- Good, even lighting (avoid shadows or conflicting light sources). You can use natural lighting but do some tests before shooting.
- Audio of the speaker is clear and free of clothes rustling or other distracting sounds.
- Use a tripod – keeps the shot stable and the viewer focused on the testimonial.
- Make sure you have ample storage on your filming device (eg phone) before the day you shoot – freeing up storage can be time consuming!
- Spend some time on the post-production edit to craft a testimonial that tells the story succinctly and effectively.
- Make sure you have approval by the subject/customer to share the video via all your intended channels. You might want a written agreement in place to protect everyone.



WRITTEN REVIEWS

While not usually called ‘content’ in the usual sense, a written review on your business page (via Facebook’s review function) is

an excellent proof point for potential customers to see. While you can't outwardly solicit reviews from your followers (these do need to be authentic), great service will build these up naturally over time. The idea is to have quality (5 star reviews) and quantity (builds legitimacy in your rating). For a more detailed review that you're keen to share, host these on your website in a long form feature piece style with an ad or post on social media simply promoting this – this won't count towards your official star review on Facebook though.

COMMUNITY POSTS TO PAGE/COMMENTS

Outside of the official review function, your community can help build positive sentiment in your business by positive comments on posts, and posts to the page, too. YouTube is another powerful social media channel (if that's included in your definition of social) and the comments section of these videos don't just help create good discussion, but indicate to YouTube that your videos are engaging and should probably be more visible in search results. Have you ever considered uploading a video of yourself highlighting the importance of insurance or a related topic? It's worth thinking about.

@MENTION

When it comes to a conversational platform like Twitter, @ mentions are hugely important.

As a financial adviser you might encounter public financial discussions on topics where you have expertise. In a discussion with Twitter accounts that enjoy a big following, you can simultaneously showcase your expertise and build new followers in the process. Just remember to choose positive, constructive discussions and debates!

Explainer content

How to... are among the most popular categories searched online – especially on YouTube. But plenty of others who are not actively searching “how to...” will still be interested in this content if presented to them on Facebook or Instagram. In the Explainer style, you’ve got the ability to take complex ideas and simplify or at least communicate them in a way your target audience will understand best.

BEING A SOURCE OF TRUTH AND CLARITY IS EXCELLENT BRAND STRATEGY

Insurance is full of technicalities – so if you’re able to explain these to your audience in a way that is relatable to them, you will be at least one of their options when it comes time to getting new cover.

READY YOUR AUDIENCE FOR THE PROCESS OF GETTING COVER

At least a percentage of your customers will be getting insurance for the first time. So it can be a good idea to create content that takes them through the process of dealing with a financial adviser, right through to cover. Explain the model, how you find insurers, and the steps in getting cover in place. This story can be told a number of ways including an animated video, infographic or a blog post. You might want to try different formats and see what works best for you.

MEASURING SUCCESS OF YOUR ADVICE

And to know what works, you’ll need to analyse the data for your content as you post it. Even if you just post content organically (that is, don’t boost or advertise), Facebook will give you some basic information about how many people the post reached, and how much engagement it got. If you boost or advertise, you’ll get even more data like how long people watched a video.

TOP TIP

Check out our three steps to creating an engaging social media post, with 2 examples, on pages 11-14 of this guide!

Seasonal content

Staying current to what's happening across the year helps keep your business' social media relatable. While your content doesn't always need to be insurance-focused (some personal and culture stuff is always good), you might find some good crossover opportunities. For example, New Years may be a good time to talk about financial resolutions (including covering yourself).

SHOW SOME OF YOU AND YOUR BUSINESS' PERSONALITY

Part of building a long-lasting brand in the market is how you show your humanity and personality through your external comms. Many of your clients will choose you for more than just your subject matter expertise. What is it that you want New Zealand to know about you and the team? Share team events, attending events, birthdays, and seasonal occasions.

WELL-TIMED ADVICE

If you can bring the right content to the right person at the right time, you've got a great chance of connecting with them. This takes some planning and some broad understanding of audience targeting (either through boosting a post or in Facebook's [Ad Manager](#) platform) – keep an eye out for our guide to [Boosting and Advertising on Facebook](#).

Think about the moment at which people are thinking about financial security or insurance:

- Getting married
- Buying a home
- Having children

You can use [Facebook's targeting](#) to build audiences that reflect these life stages. Think about interests – someone getting married may be interested in bridal content or wedding venues. You'll need to play around with the targeting in terms of age, too. Once you

have an audience that best represents your target life stage, take the time to create some advice specifically for them. For example, 'Hidden Costs Of Getting Married' or 'Protecting your future together – advice for newly married couples'.

REACTION TO CURRENT EVENTS AND WHAT'S TOPICAL

Many Kiwis visit social media sites to consume news media, bypassing news websites entirely. Social media offers the instant feedback of reactions and community discussion. If there are current events that touch on insurance or personal finance broadly, this could present an opportunity to reinforce your business as a trusted authority on the subject.

Look out for news media that covers insurance, legislation changes, the economy, the job market, or indeed articles about the specific area of insurance you advise on (health, funeral, business, etc).

Thought-provoking content

Great social media accounts aren't just a one way street of content sharing. The most effective channels are those with discussions and community engagement. Facebook will reward this engagement with more organic exposure to friends of followers and beyond. That's why we'd suggest building in an element of community discussion to your content plan.

GET PEOPLE THINKING ABOUT THEIR FINANCIAL SITUATION

As an adviser, you ask plenty of questions. Your social media presence can start this conversation off. Why not put the question out to your followers about a given topic of the day.



TREAD CAREFULLY - FUN
DISCUSSION ENCOURAGED!

You will need to be sensitive here as this is a public forum and anything too personal might make people uncomfortable to share their experience.

A safe place to start would be getting people to share their biggest questions about insurance, or provide their own opinions on preparing for getting married, buying a house, having children with regards to financial security. Not all questions need to be directly about insurance but should have some connection to the life stages or motivators for getting cover.

Personal content

There's absolutely nothing wrong with personal content. In fact, channels like LinkedIn have become increasingly 'human' and less corporate in their tone. In an industry centred around people, content that talks about you and not your business is going to provide welcome variety to your followers.

WHAT ARE YOUR HOBBIES
AND INTERESTS?

Are you a DIY enthusiast? A fishing buff? Share some of your experiences from your personal life in among your 'business' content to give everyone a more complete view of who you are. Personal content isn't everyone's cup of tea, but for a good

percentage of the online community this will help you be more approachable should someone be seeking independent financial advice.

COMMUNITY CONNECTIONS

At a public event in the community? Share some thoughts on this or even some video if it's appropriate. Your position in the community (business or otherwise) is part of what makes some people choose you over others.

FAMILY

If you and your family are comfortable sharing a bit about your lives, some personal stuff like the arrival of a new baby or a family member heading off to school is a nice change from insurance advice content.

All personal content should be considered carefully and not overdone – ultimately you want to build your presence as a financial



Testing what works

Social media, like all marketing, isn't something you nail straight out of the gate. In fact, you'll probably run a few different content campaigns that don't generate a bunch of leads – or even get much

engagement.

Keep an open mind – the content that lands for you and your audience may be different to others. So you need to test plenty of different things and make sure to spend time on your Facebook page's insights section to learn from the data available.

Creating a post in three easy steps

1. WRITE AN ENGAGING CAPTION

What you say on social media matters! Let's make sure to get your caption right.

1. Lead with a strong hook, like a question or a short sentence or heading on what the content is about. Make your first sentence as attention-grabbing, thought-provoking or interesting and engaging as possible!
2. Add context or elaborate on the topic you are writing about. Be mindful of your tone and don't add in too much industry jargon that might slow your audience down.
3. End with a strong call to action. Think about what you want your audience to do once they have seen your post; do you want them to visit your website, leave a comment below, share their experiences or get in touch? Tell them!

CAPTION LENGTH

- A short post should be limited to 90 characters so your caption doesn't get cut off. Longer posts can be good to encourage readers to keep reading, so play around with caption length to test what works best for your page.
- If sharing a link, make sure it appears in the first 90 characters.
- Using emojis can help keep captions short while catching attention.

TOP TIP

Shorten links for free by using bitly.com

2. ADD AN EYE-CATCHING VISUAL

Facebook and Instagram are largely visual platforms, so you'll want to make sure to think about what image or video you plan to share when you share a post.

- Upload an image of at least 1080 x 1080 pixels. Square crop works well on both desktop and mobile posts. Learn more about social media image sizes.
- Use high-impact images or photos with warm, bright colours to catch people attention.
- Pictures of people, especially close-ups work well, but make sure the image or video you are sharing is relevant to what you're talking about.
- Try to avoid using images with logo's or too much text.

TOP TIP

Make your own simple graphics from templates or add text to images on free sites like canva.com. You can find high-quality, free stock images from sites like pexels.com or unsplash.com.

3. SCHEDULE A POST!

- Facebook creator studio allows you to schedule your facebook and instagram posts to go live at a time in the future. Try to share posts at a time that's best for your audience, and when you'll be able to respond to any questions or comments on your posts.
- Posting is just the start – help your post reach more people by giving it a boost, actively replying to comments or questions and sharing to your story.

TOP TIP

Don't forget to add relevant hashtags for your instagram posts to help your post reach more people.

LEARN MORE:

[Boosting a post on Facebook](#)
[Social media image sizes](#)

Example post

CHANNEL

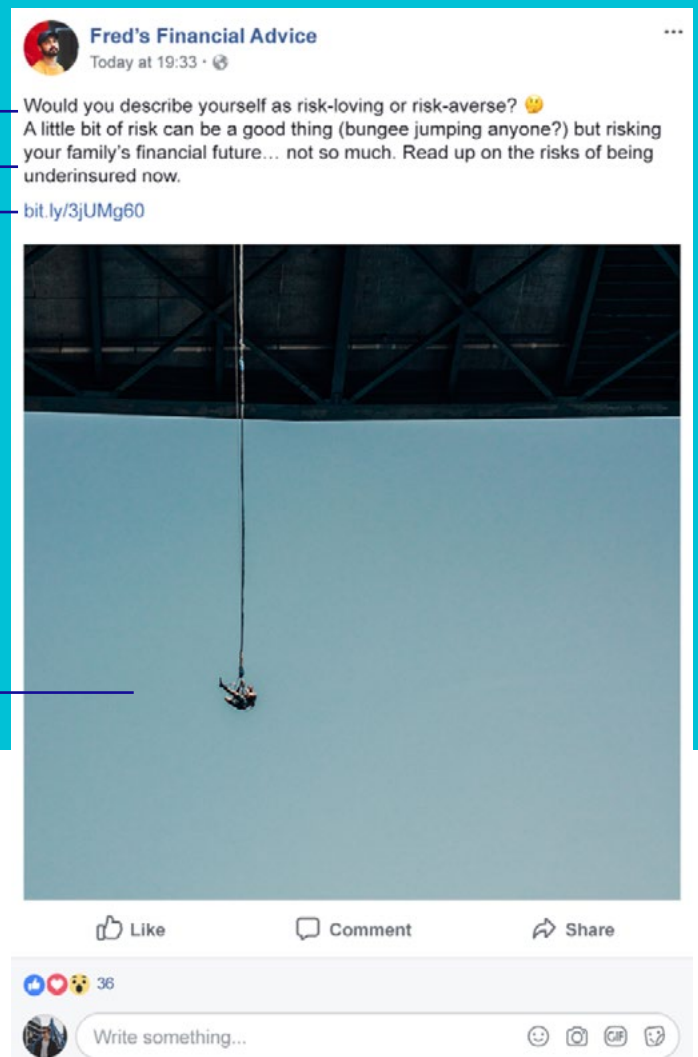
Facebook

CONTENT OBJECTIVE

Thought-provoking – Sharing a blog about the risks of being under-insured

Short, concise copy
 Encourage engagement
 Call to action

Eye-catching visual



Example post

CHANNEL

Instagram

CONTENT OBJECTIVE

Personal post for engagement – share a family moment (but relate it back to financial advice)

Personal, relatable image



Share a personal moment/story related to financial advice

Call to action

Include relevant hastags

Useful links

[Six powerful ideas for Facebook posts](#) – Facebook

[Facebook Ad Manager Basics](#) – Facebook

[20 steps to a better LinkedIn profile in 2020](#) – LinkedIn