



Social Media for Insurance Agents That Converts

Activity isn't strategy

- ✿ Most agents post every day but produce zero appointments
- ✿ Going viral is a vanity metric
- ✿ The true goal: A small, highly relevant local audience who trusts you deeply
- ✿ 1,000 local people seeing your face > 100,000 strangers scrolling past



Where attention actually lives

Facebook

- ❁ The dominant platform for 50+ / Medicare
- ❁ Where prospects ask questions in groups

YouTube & LinkedIn

- ❁ YouTube: 2nd largest search engine (explainers)
- ❁ LinkedIn: B2B, recruiting, CPA partnerships

Instagram & TikTok

- ❁ ACA, life insurance, and younger demographics (30s/40s)

The three goals of conversion

- ✿ Every piece of content you post must do one of three things:
 - ✿ • Educate the viewer
 - ✿ • Build trust over time
 - ✿ • Generate a conversation
- ✿ Posts that simply announce things train your audience to scroll past you. Every post earns its place by being useful, interesting, or human.



The weekly content mix

🌟 A 5-post weekly architecture:

- 2 Educational posts (answering common questions)
- 1 Story post (anonymized client scenario)
- 1 Personal post (the human behind the agency)
- 1 Call to Action (inviting a free review)



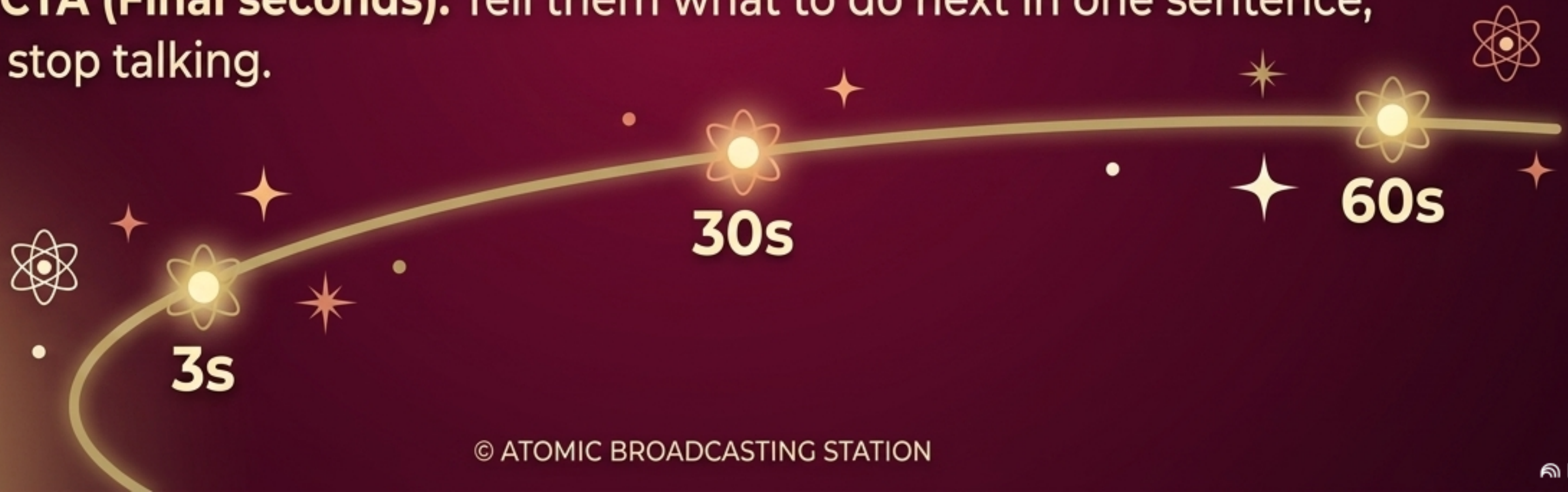
The highest leverage format

- Short-form vertical video is dominant across all platforms
- People want to see and hear a real person
- Text-only posts and stock images are ignored
- Talking directly to camera builds immediate trust



The short video blueprint

- **The Hook (First 3 seconds):** A bold statement, problem, or specific question to earn full attention.
- **The Body (30-60 seconds):** Plain language, no jargon. One specific idea or answer per video.
- **Soft CTA (Final seconds):** Tell them what to do next in one sentence, then stop talking.



The long-form text blueprint

- **8 to 15** sentences, written like a story
- **Hook:** A scroll-stopping first sentence
- **Story:** A real, anonymized client situation or personal mistake
- **Lesson:** The specific takeaway
- **CTA:** A soft invitation to reach out

Stories outperform tips because stories stick.



Compliance is a boundary, not a barrier

- CMS guidelines apply to any Medicare Advantage or Part D claims
- No superlative claims or misleading comparisons
- Education and general topics are always safe
- When in doubt, keep it general and invite a 1-on-1 conversation



The consistency mandate

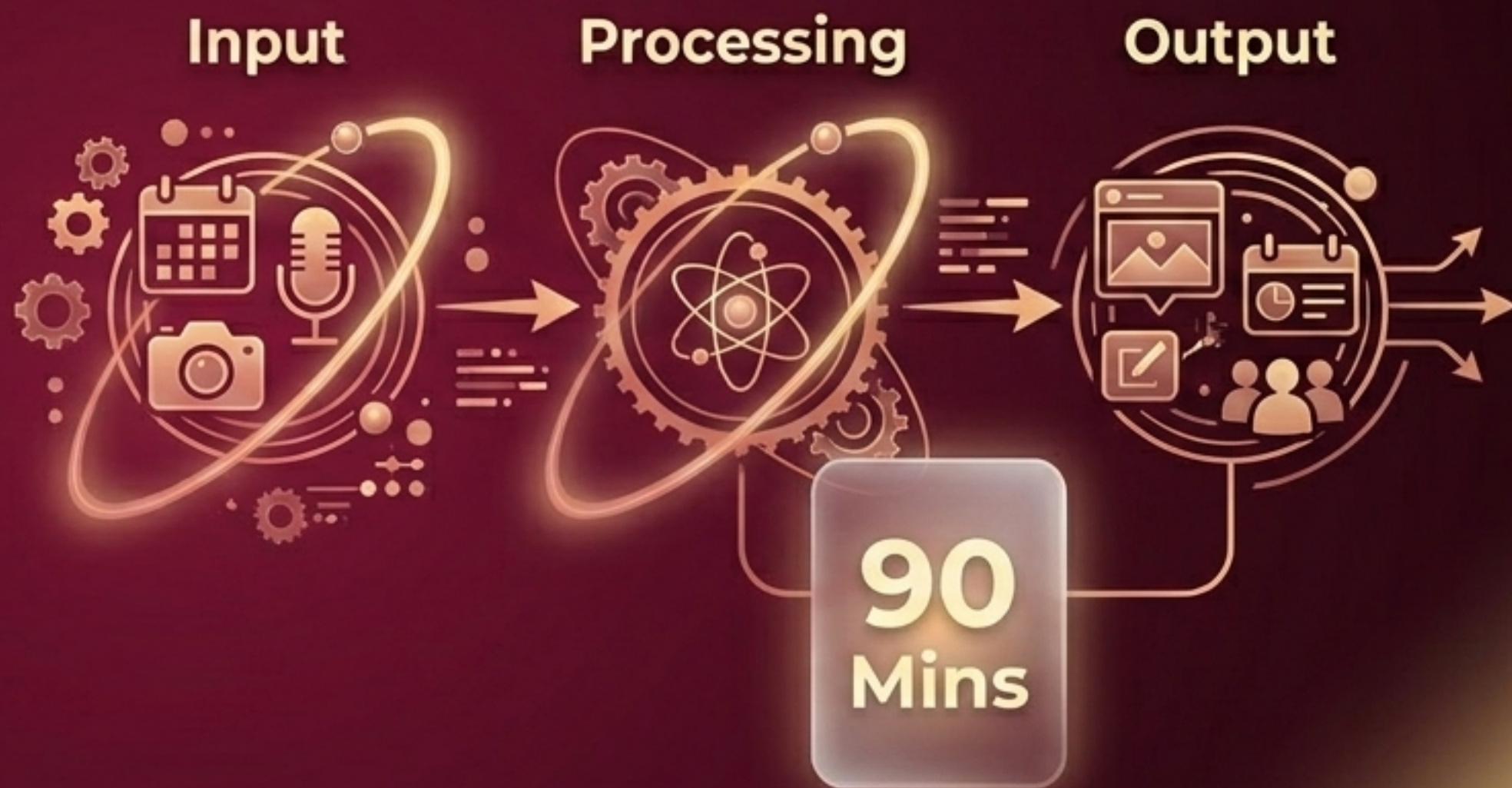
- Showing up reliably is the single biggest predictor of success
- 3 posts a week beats 14 posts followed by 3 months of silence
- The algorithm reads consistency as ongoing relevance
- Your audience reads consistency as trust



The batching protocol

- Monday: Plan the week's topics and questions
- Tuesday: Record 3 to 5 short videos in one sitting
- Wednesday: Write captions and schedule the week automatically

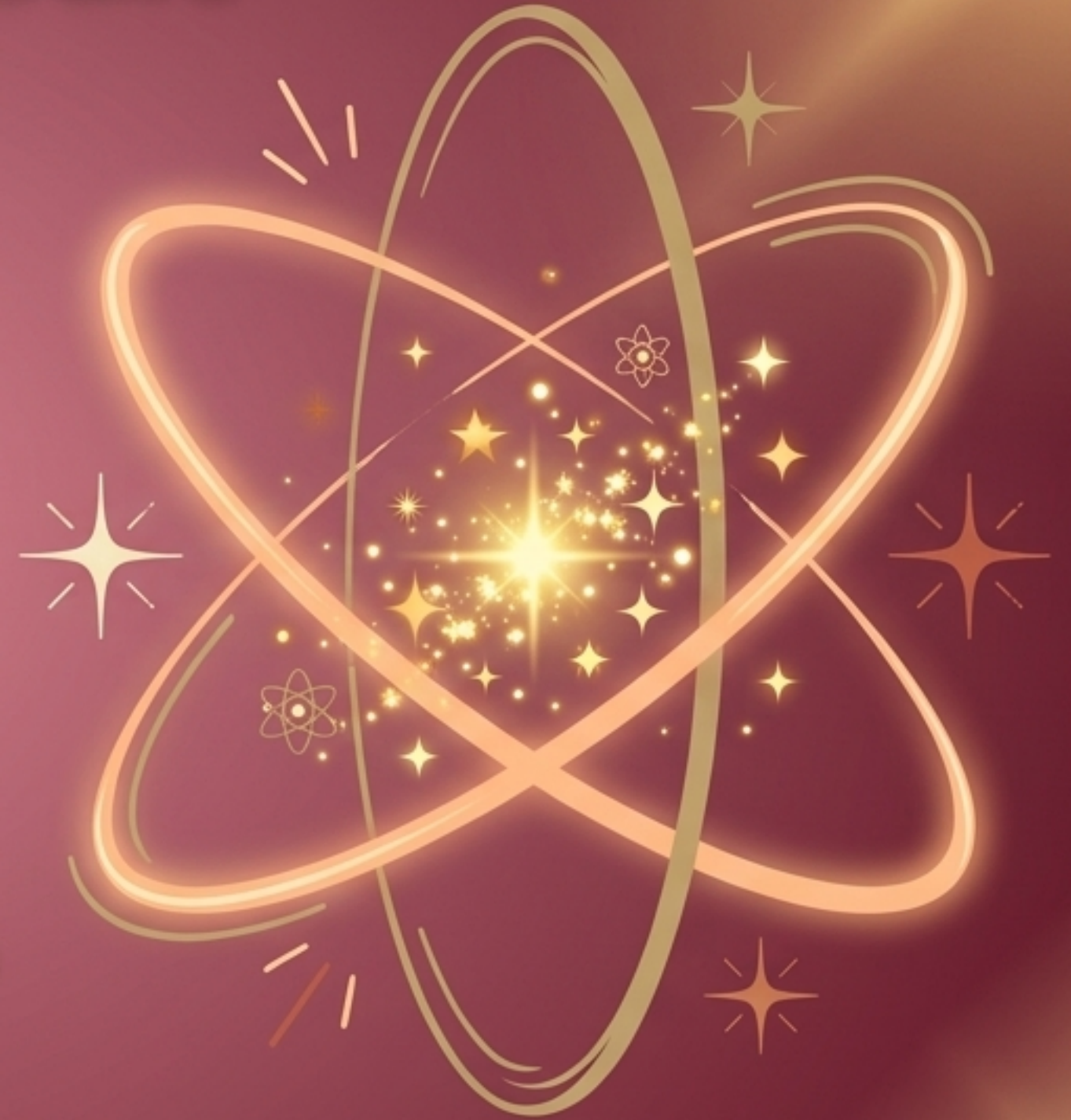
The agents who fail try to think about social media every day.
The agents who win, batch.



The compounding result

Tony, a Medicare agent in Phoenix:

- Picked exactly two platforms: Facebook and YouTube
- Executes the 90-minute batching protocol weekly
- 6 months in: Under 2,000 followers, but steady direct messages
- 9 months in: Writing 3 to 5 new clients a month from social media alone



Common mistakes to avoid

The Influencer Trap

- Big creators are not your competition
- You are writing local business, not building a global content empire
- Compare yourself only to the agent down the street

The Over-Promotion Trap

- If every post says "call for a quote," you become invisible
- Always honor the 80% value, 20% ask ratio

Social media is a conversation

Ignoring the Inbox

- Social media isn't a billboard
- Treat every comment and message as an inbound lead
- Speed and warmth convert messages into appointments



Forgetting the Funnel

- Social media is the top of the funnel
- The job isn't to close today
- The job is to be the first name they think of in nine months

Start before you are ready

Execute this checklist this week:

- Pick your ONE main platform based on your target demographic
- Write down the 10 most common questions your clients ask
- Block 90 minutes on Tuesday to record 5 short videos

The agents who win didn't start because they were ready. They started, then got better in public.

