

Build a Better Insurance Social Media Marketing Plan



A Preliminary Social Media Planning Template for Property/Casualty Insurance Cos.

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Property/Casualty Insurance Company Social Media Marketing

PRELIMINARY SOCIAL MEDIA PLANNING TEMPLATE

Prepared by:

Date:

Insurance company:

Department:

Website/blog address to be associated with this social media initiative *(this can be subpage of main corporate web address)*:

http://www.

Existing social media accounts/handles/channels associated with this website address *(fill in all that apply)*:

Facebook

Twitter

LinkedIn

Youtube *(or other video sharing)*

Slideshare *(or other online service for slide deck/PowerPoint sharing)*

Flickr *(or other online service for photo sharing)*

Others

General audience focus *(select one)*:

agents/brokers commercial lines insurance buyers personal lines insurance buyers

General description of product(s)/service(s) area to be subject of this initiative:

Description of specific target audience (examples: agents/brokers... CEOs/risk managers at nursing homes... CEOs/risk managers at architectural firms... small business owners... upscale homeowners... parents of teen drivers... recreational boat owners... etc...):

Specific information on the product(s)/service(s) your company provides to this target audience:

Company tagline that applies to these product(s)/service(s):

Key point of differentiation that your company brings to the marketplace for these product(s)/service(s):

Top five competitors for this product/service area (provide company name as well as any branded names for products/services directed at the specified target audience):

1.

2.

3.

4.

5.

Geographic range for these products/services *(select one):*

Local Regional National International

Rank goals of your social media marketing initiative in order of importance *("1" most important to "7" least important):*

- _____ Generate exposure for company/product line/service
- _____ Increase website traffic/blog subscribers
- _____ Improve search rankings
- _____ Develop new business partnerships
- _____ Generate/nurture qualified leads
- _____ Reduce overall marketing expense
- _____ Improve sales

Social media tasks you would consider outsourcing *(check all that apply... this is just a guess at this point in your planning... this list will help an outside social media marketing firm prepare accurate time/pricing projections in response to your request for proposal):*

- _____ Design/development
- _____ Content creation
- _____ Analytics
- _____ Monitoring
- _____ Research
- _____ Strategy
- _____ Community management
- _____ Live tweeting of events

Number of in-house staffers you anticipate will be available to work full-time on this social media marketing initiative *(select one... this is just a guess at this point in your planning):*

zero one two three more _____

Number of in-house staffers you anticipate will be available to work at least 2-4 hours per week on this social media marketing initiative *(select one... this is just a guess at this point in your planning):*

zero one two three more _____

