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

PRLIMINARY SOCIAL MEDIA PLANNING TEMPLATE

Prepared by:	Date:
Insurance company:	Department:
Wahsita/blog address to be associated with this	s social media initiative (this can be subpage of main corporate web address):
	s social ineula initiative (inis can be subpage of main corporate web address).
http://www.	
Existing social media accounts/handles/channe	els 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/Pow	verPoint sharing)
Flickr (or other online service for photo sharing)	
Others	
General audience focus (select one):	
[] agents/brokers [] commercial lines insura	ance buyers [] personal lines insurance buyers
General description of product(s)/service(s) are	ea to be subject of this initiative:

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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.

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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

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