

# 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:

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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...):

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

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

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

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**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. 

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2. 

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3. 

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4. 

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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 \_\_\_\_\_

