

hearsay

# The field marketer's guide to Instagram

How to help your team attract prospects, retain customers and grow business on Instagram



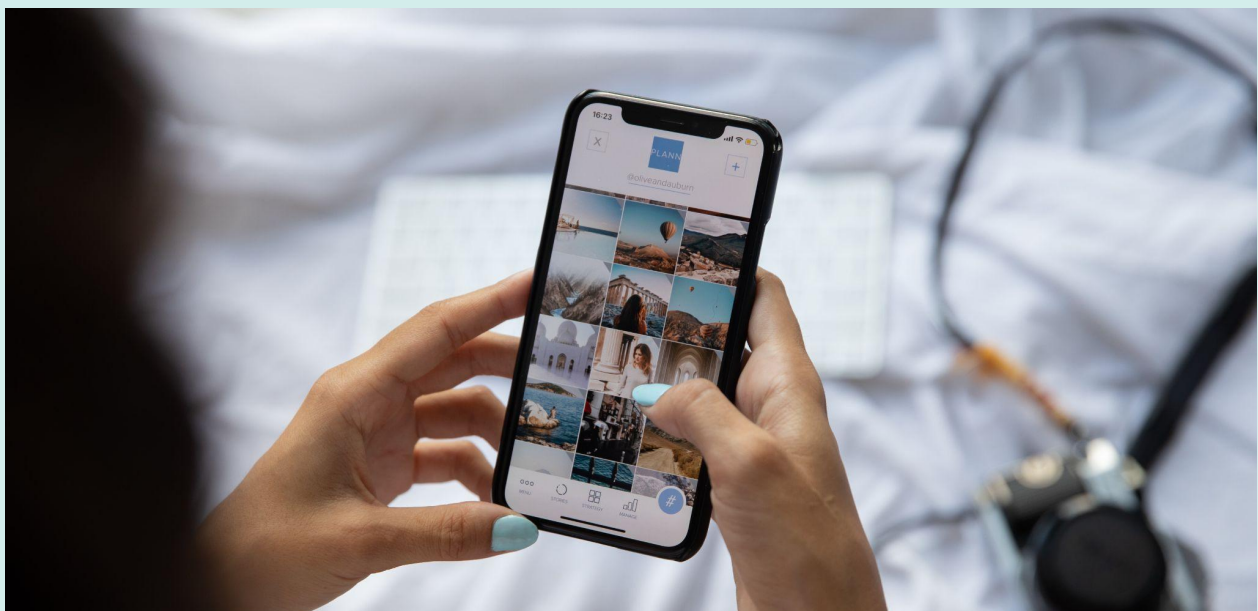
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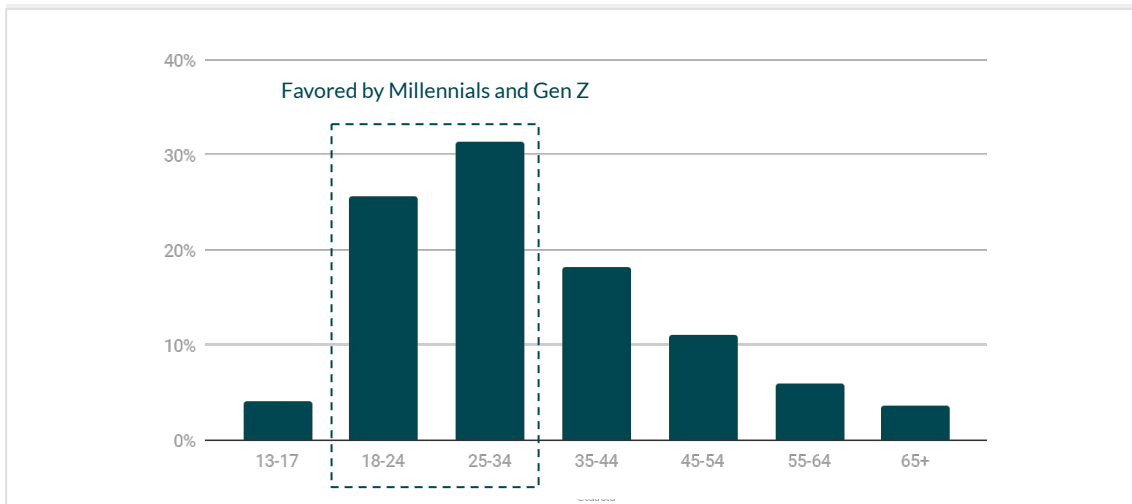
# With more than 2 billion monthly active users, marketing on Instagram shouldn't be an afterthought.

The question is, what's the best way for financial firms to use Instagram as a lead generation and sales tool? This guide has answers.

Each page offers tips for defining your strategy, advice on how to educate your field, and data-driven guidance on how to create post content that'll resonate with your target audience.



# Why should agents and advisors use Instagram?



## Percentage of U.S. adults who use Instagram as of January 2023, by age group

There's plenty of data out there to prove that marketers are finding success on Instagram. However, most success stories feature companies that sell retail products to a broad consumer audience. The thing we need to uncover is, does Instagram also work for agents and advisors with service-based businesses? Data says yes!

Owning the social media sweet spot between Facebook and TikTok, Instagram has a young and increasingly affluent user base. Given that 60% of the platform's

audience is under 34, it's the ideal network to engage with the next generation of clients.

Clients are also ready and willing to interact with businesses and service providers on Instagram. In fact, 90% of users follow a business profile, and 70% of shoppers are looking to Instagram for their next purchase.

Those are some powerful metrics! Now, let's talk about what types of business activities you can drive on Instagram.

# User engagement on Instagram

Instagram provides agents and advisors with unique opportunities to drive client engagement. A strong social selling program will help field team members:

1. **Acquire new customers.** Market services on Instagram to drive brand awareness and capture new leads.
2. **Nurture and engage existing customers.** Staying connected with clients in real time allows agents and advisors to share relevant insights and advice. This type of top-of-mind marketing strengthens relationships and introduces new cross-sell and up-sell opportunities.
3. **Build a thought leadership platform.** Delivering valuable Instagram content helps agents and advisors build trust and credibility while differentiating themselves.
4. **Connect with centers of influence.** Advisors and agents can target CPAs, accountants, real estate agents, attorneys, bankers, or loan officers with relevant Instagram content to encourage referrals.
5. **Recruit new agents.** For teams looking to grow, displaying a modern social media presence on Instagram helps attract digitally-savvy agents.

1.5%

People are 1.5x more likely to want to see branded creator content on Instagram than on other platforms

Source: [Instagram](#)

3x ER

Instagram content shared over Hearsay in 2022 had over 3x the engagement rate vs. other networks

Source: Internal Hearsay data

# Instagram for Business: An overview

Understanding the best way to leverage Instagram for Business is key to building a successful social selling program.

Like other social media platforms, Instagram allows users to follow their friends and favorite celebrities and businesses. However, unlike Facebook, Twitter, and LinkedIn—where a status update can be all text—Instagram requires the primary part of every post to be an image or video.

The visual-focused platform allows users to add a written message to their video or photo content, but only part of it is visible to users who don't click on the post. Because hyperlinks are also not allowed in post content, they must instead be added to the brand's 'bio'.

For service-based businesses, Instagram is less about selling and more about creating connections. The first step is to build a strong business profile that illustrates professionalism and value. Your goal is to position your brand in a way that's interesting and helpful so that you attract followers and drive engagement.



**CREATE AN INSTAGRAM  
BUSINESS PROFILE:  
[STEP-BY-STEP INSTRUCTIONS](#)**

# Anatomy of an Instagram Business Profile

The image shows a screenshot of an Instagram Business Profile for 'lendpro'. The profile includes a profile picture of Ben Johnston, a bio with contact information, and a grid of posts. Callouts point to various elements: 'Handle (@username)', 'Business Category', 'Website', 'Your Tags', 'Page Title', 'Bio', and 'Your Posts'.

**Handle (@username)**  
Choose something that's easy to read and search for.

**Business Category**  
The "Local Business" category and "Finance" subcategories are good options.

**Website**  
Link to your website, lead generation page, or latest blog.

**Your Tags**  
If another user tags you, you'll see tagged content in this section.

**Page Title**  
This is your brand, person, or team name.

**Bio**  
This can be your "elevator pitch," a brief description of your services and the clients you serve.

**Your Posts**  
All the content you've posted lives here.

**lendpro** 434 Posts 9,548 Followers 3,274 Following

**Ben Johnston**  
Loan Service  
Proud Husband and Father  
#LendPRO 🏠 Mortgage Guru  
Branch Manager LendUS  
NMLS# 243751... more  
linktr.ee/lendpro  
8150 Sierra College Blvd # 250, Roseville, California

**Follow** **Message** **Contact** +

Outdoors Inspiration Markets Realtors About Me

MAINTAIN HEALTHY FINANCES REASONS TO BUY AND NOT RENT LendUS

Continue to see the good in yourself and in others. Your...

# Instagram for Business on Hearsay



Agents and advisors can customize multiple Instagram profile details within Hearsay Social. Here are some best practices:

**Username.** Choose something simple and easy to spell. Try to incorporate an advisor, agent, or team name.

**Profile picture.** A professional headshot is recommended.

**Bio.** Communicate the following in 150 characters or less: job title and description, unique characteristics of the person or brand, and benefits of following the profile.

**Link.** This is the only place on Instagram to include a clickable link, so make it a good one! A website, blog, or community event registration page are great options.

**Contact information.** Add business contact information that followers can use to get in touch (website, email, phone).

**Action buttons.** This feature lets you connect your Instagram profile to an online appointment scheduler, making it easy for prospects and customers to schedule meetings with members of your field team.



# Anatomy of an Instagram post



The diagram illustrates the components of an Instagram post from the Prudential account. It shows a mobile phone interface with a post featuring a large '38%' graphic and text about life insurance costs. Callout boxes provide detailed information about each part of the post.

**Visual**  
A single photo or video, or a carousel of photos and videos (up to 10).

**Like**  
Unlike Facebook's multiple emoji options, Instagram only allows users to "heart" posts.

**Caption**  
Max 2,200 characters; only the first 125 words of your caption will appear in the feed. Instagram also supports the use of hashtags.

**Comments**  
Posters and followers can comment on posts. Pay attention to follower comments; respond to the good ones and report any inappropriate ones.

**Share**  
Enables users to share your post with individuals and groups in their networks. Visibility depends on user privacy settings.

**Save to Collection**  
Users can bookmark your content to remind themselves to come back to it later.

**Post Content:**  
 PRUDENTIAL Posts  
 prudential  
 38%  
 of consumers think life insurance costs up to 3X more than it actually does.\*  
 \* Why People Put Off Buying Life Insurance, "LifeInsure.com, 2022"  
 105 likes  
 prudential More than a third of people think life insurance is more costly than it actually is. Make sure you have the facts — and use our life insurance... more  
 February 8

# How to create engaging Instagram posts

What makes a great Instagram post:

- **Quality visuals.** Whether an image or video, make sure what you share is clean, high-quality, and on-brand.
- **Compelling captions.** You have 2,200 characters to describe your image, but only 125 will appear before the user has to click “more.”
- **Relevant hashtags.** Adding hashtags specific to your line of business is a great way to expand post reach.



We’ve established that Instagram has its benefits, but with so many brands vying for attention, you need to develop a plan to stand out in the crowd. **Consistent posting** is key, so give your agents a plan that’s repeatable and easy to follow.

Tips on building a strong Instagram strategy:

- **Post regularly.** Post quality and consistency are much more important than frequency. Encourage your team to post at least once a day, and if that’s not possible, encourage them to consistently post on the same days each week.
- **Schedule ahead.** Agents can use Hearsay to schedule several days’ or weeks’ worth of posts at one time.
- **Engage with followers.** In addition to turning on comment notifications and responding to comments on their own posts, agents should follow a few key influencers and take time to comment on their posts each week.

# Use hashtags and captions to engage users

Hashtags help users discover new social posts and profiles. How? Users can search hashtags to find interesting content.

Additionally, using hashtags in conjunction with posting valuable, consistent content can help you appear in the Explore tab—a custom list of posts and profiles Instagram builds based on an individual user’s likes and dislikes.

So how effective are hashtags as a visibility tool? Research has shown that each hashtag you use increases post engagement by 11%!

No matter how many you use, make sure each one is relevant and useful to existing and potential followers. Also, keep in mind that hashtags won’t work if you use spaces, special characters, or punctuation.

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## BUILD ATTENTION-GRABBING CONTENT WITH THESE TIPS:

- Only 125 of the 2,200 characters allowed for long posts will show prior to clicking, but research suggests longer captions drive higher engagement.
- Make sure the visible part of your post is intriguing enough to generate clicks. Questions and interesting facts tend to work well.
- Always provide value by telling a story, offering a helpful tip, or showcasing your expertise.
- When relevant, add a call-to-action (CTA) to prompt readers to click, read, comment, or share.

# Developing an Instagram content strategy

Instagram is a visual platform that presents both opportunities and challenges for marketers.

Images and videos have consistently proven to be more engaging than copy alone. Yet, visual content is new territory for financial services representatives, and may require time to learn how to create and leverage it.

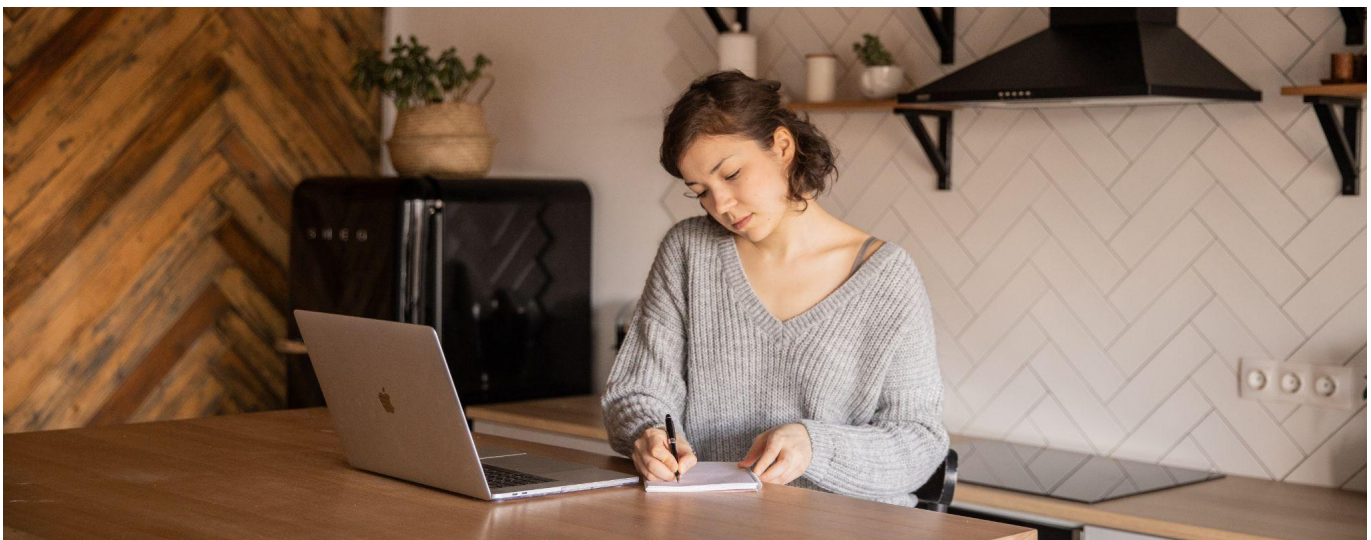
Establishing a solid content strategy will help marketers make the most of Instagram. Before you create your first post, answer the following questions:

**Tone.** What 'voice' and vibe best represents your agents, advisors, and brand?

**Messaging.** What broader products, services, and marketing campaigns does your firm want to promote? How can Instagram posts help?

**Goals/metrics.** What does Instagram success look like to you? What metrics will you evaluate to determine success?

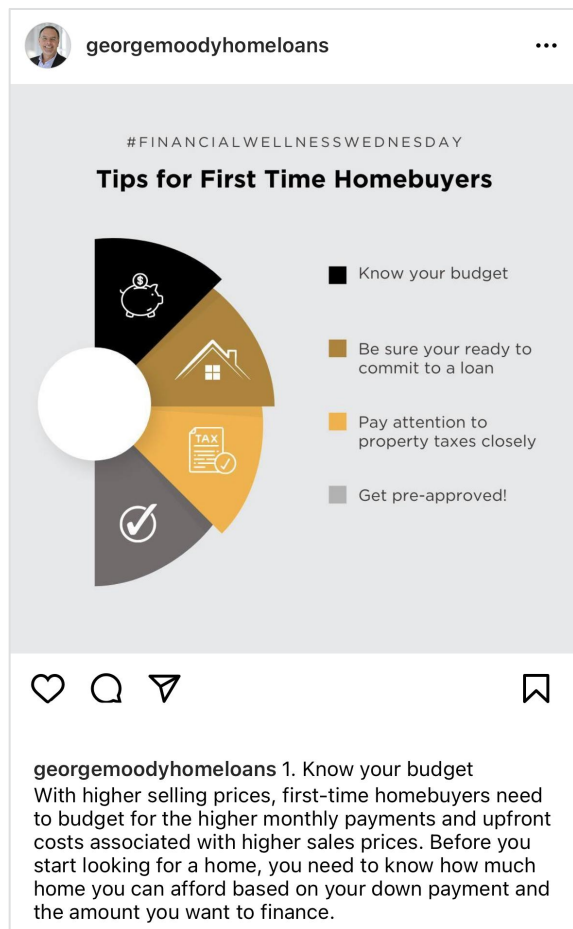
Once your vision for Instagram is in place, it's time to create content pillars.



## Use content pillars to create and organize themed content.

The following pillars work well for financial services:

### EDUCATIONAL



Source: [@georgemoodyhomeloans](#)

Post relevant and timely tips, reminders, and insights that cater specifically to audience needs and interests. If your firm, agent, or advisor has a blog, direct traffic to a post by adding a link in the page bio. Use the hashtag "#linkinbio" to direct followers to the link to learn more.

### COMPANY CULTURE



Source: [@cibc us](#)

Photos featuring team members out in the world—attending industry or local events, volunteering in the community, or accepting awards—highlight your firm's brand personality, and humanize the page. If you're a firm focused on recruiting, this is a great content pillar to prioritize!

## ENTERTAINING/INSPIRATIONAL

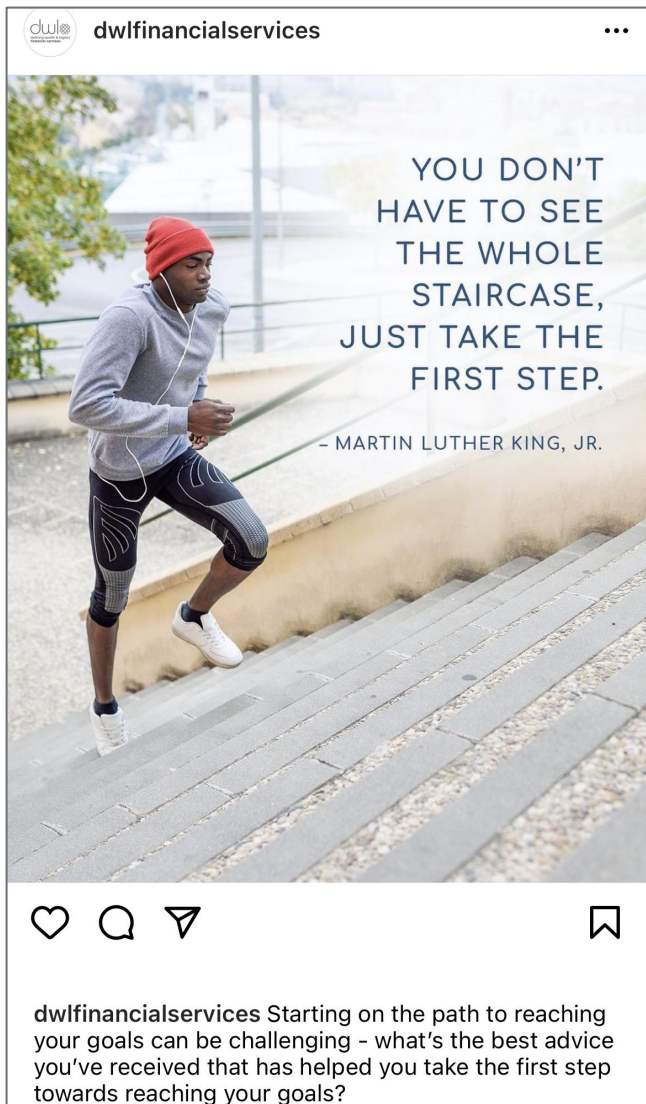


Image Source: [@dwlfancialeservices](#)

Don't underestimate the power of a good quote or funny, relatable meme! Everyone like to break up their day with words of wisdom or a good chuckle. These types of posts offer a break from more serious posts and make it easy to build a more balanced content strategy.

## PROMOTIONAL



Image Source: [@your mortgage guy for life](#)

While a majority of posts should be about connecting with and providing value to your agent or advisor's followers, it's okay to slip in a tactful sales pitch in every so often. Just be careful not to overdo it!



Creating library content focused on the aforementioned 'pillars' is a great way to build an effective Instagram strategy. Also, be sure to provide your team with a recommended content mix and minimize use of promotional posts.

For example, if your agent or advisor's primary goal is to build relationships, their ideal content mix may be 50% company culture, 30% inspirational, and 20% promotional. If credibility is the goal, a 60% educational, 20% company culture, and 20% promotional mix might be more appropriate.

It's also a good idea to create an editorial calendar that you can use to plan content creation well in advance. Populate your calendar with expected marketing campaigns, relevant holidays, and other events that offer opportunities to share engaging Instagram content.

Last but not least, pay attention to analytics and feedback. As you define your ideal mix, ask the field what's working and what's not!

## Pro Tip: Vary content to slow the scroll

While posting images is the tried-and-true method of sharing on Instagram, there are many other ways for field team representatives to publish content!

Within their profile feed, users can post a **single photo or video** or can put together a **carousel**, which contains multiple photos and videos (up to 10).

**Stories**—quick 15-second videos—appear at the top of a user’s Instagram feed in little circles and can be used to connect with followers. **Reels** are the same type of content but are searchable and viewable by all Instagram users. You can use reels to help agents and advisors get discovered by new prospects.

Seasoned Instagram users can also share **live** videos and communicate with their audience in real time.

**Guides** are curated content collections focused on a particular topic. You can use them to build valuable repositories containing information on key topics to showcase expertise.

### INSTAGRAM POST TYPE GLOSSARY

**In-feed** (*visible to followers*)

**Carousel:**  $\leq 10$  images and videos

**Single video:** 3 seconds to 60 minutes long

**Story:** Video (auto-divided into 15 second increments)

**Live:** Real-time video,  $\leq 4$  hours

**Guide:** Content collection focused on a particular topic, viewable on a specific profile tab

**Reels**

Public videos,  $\leq 60$  seconds



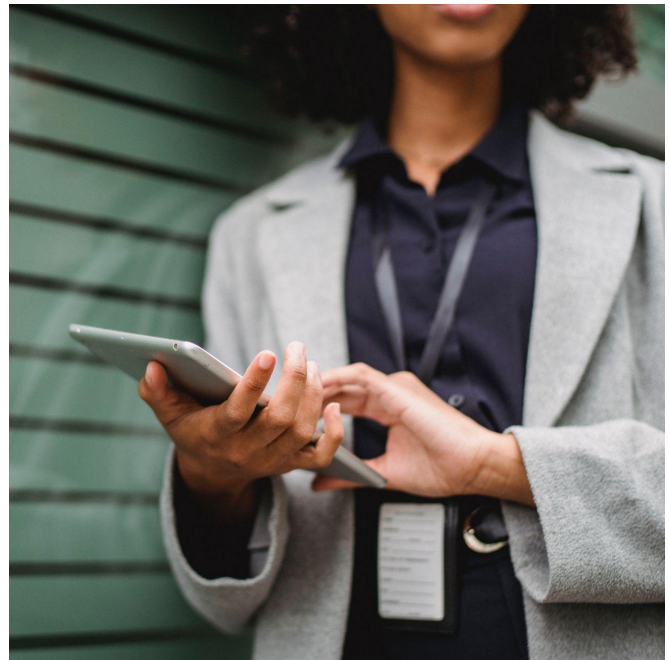
# Measuring Instagram performance on the Hearsay platform

Don't forget to **measure the results** of your Instagram efforts and optimize your strategy as you go.

The Hearsay platform measures:

- **Audience size and demographics**  
How many *followers* each team member has, as well as ages and locations of audience members
- **Reach**  
How many *impressions*—or unique user views— each post gets
- **Engagement**  
How many *comments, saves, and likes* each post generates

To optimize your Instagram strategy, check metrics monthly, **iterate** on what's working, and **discard** what's not working. If you're consistent, you'll see improvement over time in the form of better reach and better engagement.



# Conclusion

Instagram can be a powerful tool for financial services professionals, but it takes a thoughtful approach to be successful.

## Key points to keep in mind:

- Your audience—and your team’s audience—is on Instagram
- Insta-success begins with a strong business profile, including a professional headshot and bio
- Crafting an ideal Instagram post, which contains compelling visuals and relevant hashtags, helps field teams expand reach and gain followers
- Content mix should be informed by marketing goals, with promotional content being used sparingly
- Encourage your field to engage by commenting on posts and responding to comments on their posts
- Measure results at least monthly, test new tactics, and optimize your strategy based on what you learn

Instagram’s power lies in its ability to connect your field to current and potential customers—so encourage them to be authentic, have fun, and be real!

To find out how Hearsay can help your advisors and agents, contact us at:

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