

Building engaging interactions online

Start conversations. Build trust.
Grow your business.

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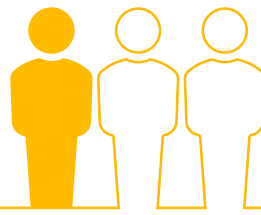
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How social media can benefit your business

Social media has become an extension of how clients learn, communicate, and make decisions. To remain visible, trusted, and part of your clients' daily lives, you need to show up where they are.

81%

Of Australians use social media daily, spending over 2 hours on average.¹



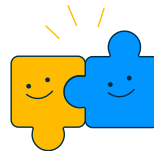
Almost one in three Australians now seek financial advice from social media influencers.²

Social media is more than a marketing tool – it's a strategic social presence you can use to grow your business by:



Retaining and deepening client relationships

Social media provides an always-on way to check in, share insights, and remind your clients that you're actively looking out for them. A consistent digital presence builds loyalty, reduces the risk of your clients drifting away and keeps you top-of-mind when life events happen.



Creating opportunities for new connection

A client who "likes" a post about affordability may be feeling financial pressure. Someone who shares your content about milestones may be about to buy a home, change jobs, start a family, or enter retirement. These are openings to start conversations at the right time.



Showing relevance and expertise

By simplifying complex insurance concepts, busting myths, and connecting cover to everyday concerns, you show your value not only to existing clients but their networks.



Building referral pathways

Clients who see and share your content effectively become advocates for your advice. A strong digital presence can act as a silent referral engine, extending your reach without extra cost.

1. www.theglobalstatistics.com/australia-social-media-statistics/

2. <https://compareclub.com.au/media/shock-findings-over-30-of-australians-turn-to-social-media-for-financial-advice/>







Building a strategic content system

To build social media into your marketing strategy, you need structure. A strategic content system ensures that your online presence is consistent, purposeful, and scalable.

01

Set clear goals

Before posting, take a moment to decide what social media should achieve for your practice. Whether your goal is to spark first meetings, deepen client relationships, or attract referrals, clarity on your objectives helps ensure your content supports real advice outcomes.

	Goal	Objective	Example Posts
	Build visibility & trust	Be seen regularly in client feeds as a credible, helpful adviser.	<ul style="list-style-type: none">• 3 myths about life cover that cost families thousands.• Why reviewing your policy annually matters.
	Strengthen client relationships	Maintain connection between formal meetings; show personality and care.	<ul style="list-style-type: none">• What I learned from three affordability conversations this week.
	Generate conversations	Spark comments or direct messages that lead to one-on-one engagement.	<ul style="list-style-type: none">• New baby? New mortgage? Let's talk about keeping your cover in sync – DM me.
	Drive reviews & retention	Nudge clients to book check-ins or reconsider cancellations.	<ul style="list-style-type: none">• Thinking of cancelling? 3 smarter ways to cut costs without losing protection.
	Show thought leadership	Be recognised as a trusted voice on trends and practical advice.	<ul style="list-style-type: none">• Why affordability is the #1 challenge for families in 2025 – and what to do about it
	Attract referrals	Encourage clients to share content or tag others and bring in new prospects.	<ul style="list-style-type: none">• Quick video: How to keep cover affordable in 60 seconds.

02

Understand your audience

Understanding your audience and the ideal clients you want to reach is crucial. The most effective content doesn't just generate likes; it attracts the right audience: people who are likely to benefit from your advice and take action. Start by identifying your ideal client segments and tailor your content to their life stages and concerns. When your content feels timely and relevant, it draws in the people you're best placed to help.

Throughout this guide we use the term 'clients', but the same principles apply when advisers use social to reach potential customers and broader audience segments. The goal is to build trust, demonstrate expertise, and stay visible to the people who may one day become clients.

Use these guiding questions before you post

Who am I trying to reach?



Single professionals



Young families



Empty nesters

Where do they spend time online and how do they consume media?



Facebook



Instagram



LinkedIn

What concerns are top of mind for them right now?



Rising costs



Life changes



Cover suitability

When your content speaks directly with your audience's needs and shows up where they are, it becomes a pathway to meaningful advice conversations.

Top things people do on social media

→ **82%** watching videos³

→ **76%** reading news³

→ **72%** interacting with friends and family³

3. <https://prioridata.com/data/social-media-usage/><https://prioridata.com/data/social-media-usage/>

03

Creating engaging content

Different clients engage in various ways. A strategic content system incorporates a variety of formats to reach more people and avoid fatigue.



Written posts

Short, clear insights and reflections.



Visual explainers

Carousels or infographics for step-by-step guidance.



Short videos

A 30-second clip filmed on your phone to show authenticity and presence.



Client stories (with consent)

Demonstrating real value in everyday terms.

Simple visuals often outperform complex designs

Remember

Authenticity builds trust. Clients don't expect studio-quality production – they expect to see you.

Here are some ideas you can adapt



A quick mobile video answering a common client question.



A clean infographic with **3 simple steps** or **Top 5 mistakes**.



A candid photo of you preparing for a client review.



A milestone-related image (e.g., new house, family moment, retirement).

04

Plan and schedule

Posting occasionally is better than not posting at all, and posting once or twice a week is more effective than a burst followed by silence. Prioritise quality over quantity: Two posts that spark conversation will create more value than ten that clients' scroll past.

Clients engage most when your content feels focused and consistent. Choosing one or two themes each month gives your posts structure, allowing you to avoid random posting and instead create a narrative that reinforces your expertise.

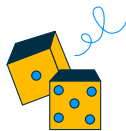
Examples of monthly themes could include



**Affordability in a
cost-of-living environment**



**Preparing for retirement
and legacy planning**



**Common myths and misconceptions
about life insurance**

05

Track and refine

Tracking which posts spark comments, private messages, or review bookings helps refine your future activity. Over time, you'll see patterns in the hooks, topics, and formats that work best with your client base – use these signals to shape your future content.

To explore practical ways to track your wins and understand what success looks like on social media, head to the Measuring Success part of the playbook

Crafting posts that work

You only have a few seconds to earn attention with your post. Most advisers know what to say - the real challenge is saying it in a way that clients notice and respond to.

The formula to crafting posts that start a conversation



Measuring success

Many advisers hesitate to use social media because they aren't sure how to judge whether it's working.

The default is to focus on numbers that are easy to see – likes, followers, impressions – but these are vanity metrics. They may make a post look popular, but they don't necessarily reflect business outcomes.

For advisers, the objective measure of success is not how many people saw your post, but whether it sparked conversations, built trust, and led to meaningful opportunities for one-on-one engagement with clients. Focus on conversations, not on clicks.

Shifting the focus from reach to relationships

Ask yourself

- ✓ Did this post spark a comment, question, or direct message?
- ✓ Did it give me a reason to follow up with a client or prospect?
- ✓ Did it help retain a client, book a review, or generate a referral?

Turning engagement into action

When someone engages with your content, treat it like a client walking into your office and asking questions.

Steps to take



01

Acknowledge

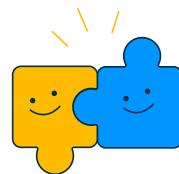
Reply publicly with a simple thank you or encouragement.



02

Follow up personally

Send a direct message or call if appropriate.



03

Log the interaction

Record it in your CRM.



04





Offer next steps

Suggest a review, send a resource, or invite them to book time with you.

Measuring success

Tracking your wins

To keep things simple, think about measurement in four categories:

	Categories	Metric	Why it matters	Summary
	01 Conversations	Conversations sparked (comments, DMs, replies to posts)	Shows clients are engaging with your advice and opening the door for dialogue.	Note in your CRM or client file.
	02 Reviews	Reviews booked (meetings that result from social posts)	Demonstrates clear business value from your online presence.	Track when a post or follow-up message leads to a booked review.
	03 Referrals	Referrals received (from clients who shared posts)	Extends your reach beyond existing clients.	Ask new clients "How did you hear about me?"
	04 Retention	Retention signals (clients reaffirming value between reviews)	Reduces lapse risk by reminding clients of your ongoing care.	Capture in notes when clients comment positively on your advice.

Building an adviser dashboard

You don't need complicated analytics. Over time, a simple monthly dashboard can help you gauge which themes, trends, and formats produce the most valuable outcomes.

Example format				
8	12	3	1	4
Posts published	Conversations sparked	Reviews booked from social	Referrals generated	Client retention signals noted

Common pitfalls

Even experienced advisers can fall into habits that limit the effectiveness of their social presence. When posts miss that mark, they risk being ignored or, worse, undermining the trust you've built.

Thought



Overlooking compliance obligations

Problem

Even well-intentioned posts can unintentionally breach regulatory standards if they contain misleading claims, unlicensed advice, or fail to meet disclosure requirements. Social media is a public communication channel subject to the same legal and ethical standards as any other form of client interaction.

Better approach

- Before posting, ask: Does this align with the Life Insurance Code of Practice and relevant financial services laws?
- Avoid making product recommendations or personal advice.
- Stick to general insights and always ensure your content is clear, fair, and not misleading.



Transactional posting

If every post is a request – **book a review, call me today** – clients will tune out. Social media should feel like an ongoing conversation, not a series of transactions.

- Mix practical insights, timely reflections, and lighter content alongside invitations to book reviews.
- This balance builds trust and keeps clients engaged.



Overusing jargon

Insurance terms can be complex. Using too much technical language can cause clients to disengage. If you wouldn't use the term in a face-to-face meeting, avoid it online.

- Simplify without dumbing down.
- Focus on what matters to the client's life, not on the industry terminology.
- Use 'cover' instead of 'policy benefits', 'protect your family' instead of 'manage your risk exposure'.



Sounding too sales-driven

Posts that sound like product brochures or sales scripts can feel distant. Your goal isn't to sell insurance – it's to show you understand what matters and can guide clients through decisions.

- Lead with client concerns and life events, not insurance products.
- Write as though you're speaking directly to a trusted client across the table.
- Keep it professional but personal.



Ignoring visual

Text-only posts get lost in a crowded feed. Posts with images or short videos consistently generate higher engagement. Visuals don't need to be elaborate.

- Aim for at least one visual element per post, even if it's simple.
- A clean infographic, a candid workplace photo, or a quick video filmed on your phone can all make your posts more memorable.



Stay in touch

For further support, please contact your Business Development Manager.