

Insurance Digital Marketing

Building your online
presence and generating
leads.

From



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01 Introduction

For an insurance agency, a digital marketing strategy is required. The only issue is that strategies are becoming more and more demanding each year. What used to be a basic website and a few directory listings have evolved into complex systems of ads, social media platforms, email automation, and tracking software, all while trying to find ways to keep up with the latest trends and technology. This guide combines this information into a comprehensive resource that provides a quick reference of the basic information on each topic needed to get your agency started.

Although this guide is available for Insurance Agencies, much of the information will work across most industries. We are making this for Insurance Agencies because many of the generic digital marketing guides do not cover Insurance specific topics like AMS integration to your website, nor do they provide resources.

01.01 Types of Digital Media

Online media generally falls into four categories

Owned Media

media you own like videos, webinars, and content.

Paid Media

media you pay for, like Google Ads or sponsored content.

Earned Media

media you earned, for instance, media relations, influencers, and link building.

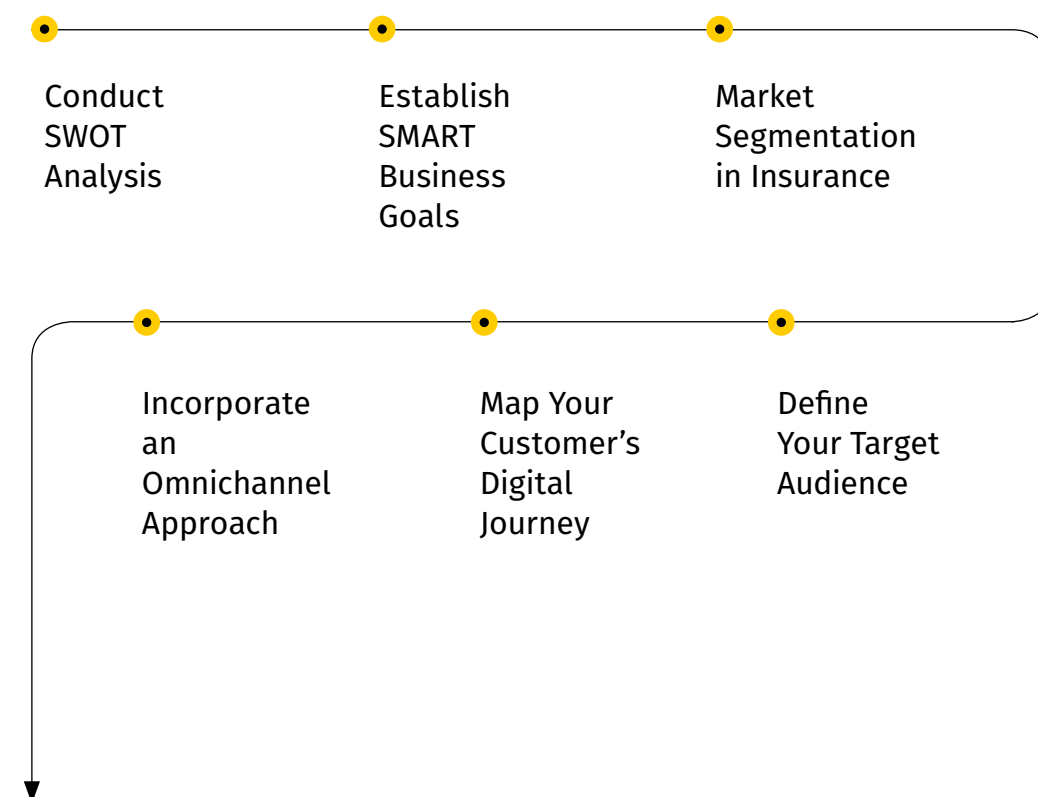
Shared Media

media that is generated, for instance, organic social media, reviews, and forums.

Building a digital marketing strategy that incorporates each of these categories has a better chance of success than those that don't. For instance, developing organic traffic through your SEO campaign will take time, months before you even see results. So launching a paid advertising campaign is generally recommended for immediate traffic and lead flow.

02 Planning

Before getting into the technicals and strategies of digital marketing, you need to prepare some basic information to have on hand for the development of your campaign. From your website to ad copy and social media posts, you need to know a few things. What are your key selling points? Who are you targeting, and for what service? What are you trying to achieve? Is your customer buying or shopping? Some of this information may seem basic, but it is important for not only the preparation of your campaign but the execution.



02.01 Conduct SWOT Analysis

A SWOT analysis is a framework to analyze a business's strengths, weaknesses, opportunities, and threats of internal and external factors. The results help create a strategic plan by identifying what needs to change to succeed moving forward and is taken into consideration during the development of any digital marketing strategy.

When performing your SWOT analysis, it's important to avoid a biased mindset and focus on the hard data and facts in order to keep the analysis accurate.

To conduct your analysis, write down your agency's strengths, weaknesses, opportunities, and threats. The first two (strengths and weaknesses) involve internal factors, while the second two (Opportunities and Threats) involve external factors. When performing this task, try to bring in a diverse group of voices that can provide actual data points and not biased opinions.

Examples of each data point from an insurance agency perspective would be

- » **Strengths** (internal) are what makes an agency better than its competitors. Examples include offering a variety of insurance products, your reputation within your local community, your existing customer, well-trained staff, and in-depth knowledge of the industries you work with.
- » **Weaknesses** (internal) are the things that make your agency worse than its competitors. Examples include relying on paper transactions, unreliable lead sources for sales, bad reviews, and a lack of trust people have for insurance agencies, all of which can be a significant hurdle.
- » **Opportunities** (external) are external factors that can provide an opportunity for growth or improve your company's position in the market.
- » **Threats** (external) are external factors that could negatively affect your company's position in the market, for instance, economic and market trends or political regulations.

	Helpful	Harmful
Internal Origin	Strengths	Weaknesses
External Origin	Opportunities	Threats

02.02 Establish SMART Business Goals

SMART business goals that work well with your SWOT analysis and are an essential part of a company's strategic plan. Put simply; SMART goals are results you are working to achieve and are a clear standard of performance to what is expected of performance and professional development.

The criteria for SMART goals are as followed

- » **Specific** goals should be detailed enough to be measured and achieved.
- » **Measurable** goals that can be tracked for progress.
- » **Attainable** goals need to be achievable.
- » **Relevant** goals are worth the time and effort.
- » **Time-bound** goals have deadlines.

When deciding on your SMART goals, you will need to know the scope of your goal or what to achieve. Most goals are the need to improve, increase, reduce, save or develop. Are you increasing monthly leads? Increasing sales? Decreasing customer wait times? When you are deciding your goals, it's important to focus on the result and not the tasks.

For a more detailed look into SMART goals, here's a great [resource](#).

02.03 Market Segmentation in Insurance

Approaching your market as a whole won't yield the best results, so the best strategy is to break down your market into segments. For many agencies, this is already done by segmenting demographic factors that include geography, education, and gender for personal lines of insurance. Examples of targeting factors for commercial lines include business needs, revenue, number of employees, and industry.

Traditional segmentations have focused on basic information like gender, age, revenue, and the number of employees. This strategy can do well in low-competition markets, but when you enter a more competitive climate, more detailed segmentation is necessary. For this reason, a customer-centric, hyper-personalized approach should be considered, which as an example, incorporates targeting the customer's 'lifestyle' and not 'age/gender' or a business's 'budget constraints' or 'primary customer base.'

For more information on detailed customer segmentation, read [Why Insurance Need Customer Segmentation](#)

For information on general segmentation, read [What is Market Segmentation](#)

02.04 Define Your Target Audience

A defined target audience is required for almost every step of the campaign, from mapping the customer's digital journey to copywriting and design. Building off of the previous section, we are simply building personas for each of your above-mentioned segmentations.

What is a target audience? It's a group of people who are likely to be a customer of your business. This is often defined by age, gender, income, lifestyle, education, location, and demographic traits necessary to your campaign.

Figure what demographic traits you will be using in your definition; for an insurance agency, a good set of primary traits for personal lines are

- ▶ Age
- ▶ Sex
- ▶ Income level
- ▶ Race
- ▶ Employment
- ▶ Location
- ▶ Homeownership
- ▶ Level of education
- ▶ Ethnicity
- ▶ Marital Status

Since we want hyper-personalized market segmentation so for secondary data variables we will target

- ▶ Lifestyles (Demographic, Socioeconomic, Consumer Behavior)
- ▶ Life Milestones (Moving, Baby, New Car, etc.)
- ▶ Budget constraints

Now we can define our audience. Defining your target audience starts with analyzing your current customer base and performing interviews. Gather all the demographic traits listed above, along with the secondary data variables.

Be hyper-focused in gathering your demographic data, you need to break down your market into detailed segments. Gather the necessary data from your homeowner customers, auto customers, boat, business, and any other segment you serve.

Create Personas

With your gathered data, we can create your buyer personas. It's good to create a persona (fictional profiles) for each market segmentation (home, auto, boat, etc.). When creating each persona, fill in your basic demographic information and include what you've learned about your persona's motivations.

Great [eBook on customer personas](#).

Target Audience



Living Status: Homeowners
Age: 25 to 35
Profession: Works at mid-sized companies
Education: High-School graduate
Income (Yearly): \$55,000+
Family Status: Married

Persona



Name: Gene Miller
Age: 33
Living Status: Homeowner
Education: Master's in Computer Science
Profession: Server admin at SaaS company
Income (Yearly): \$78,000
Family Status: Married with 1 child
Interests: Tech forums & podcasts

VS

Defining your current customers isn't enough, analyze your web traffic, competitors, and general market to identify industry trends. With this data, we will be able to create additional personas to test in our marketing campaigns. Moving forward, it's important to continually test and revise your campaigns for success.

Pro Tip: Common tools used in defining your target audience include

- ▶ Sparktoro
- ▶ Google analytics
- ▶ SEMRush
- ▶ National Census Data
- ▶ Industry Reports

Read [Steps to Find Your Target Audience](#) for more detailed information on defining your target audience.

02.05 Map Your Customer's Digital Journey

Building your customer's digital journey is fundamental to your campaign's success. Your mapped customer journey allows you to cover each interaction with your customers, starting from initial awareness to product experience as a customer. This allows you to improve customer experience, improve your product, increase customer engagement and help you better understand your customer.

Generally, an insurance customer's journey will consist of

- ▶ Customer awareness
- ▶ Consideration: the evaluation phase
- ▶ Customer decision
- ▶ New policy acquisition
- ▶ Customer experience during product ownership
- ▶ Customer retention
- ▶ Customer experience during product end

It's important after you map out your customer's journey, that you perform testing and follow the mapped steps as your customer would when purchasing your product. This will reveal obstacles and potential technology errors the customer may experience during their journey of purchasing your product.

Read [Mapping Out Customer Journeys in Insurance for Better Customer Experience](#).

02.06 Incorporate an Omnichannel Approach

An omnichannel approach means that not only are you making your brand accessible across online and offline channels, but you are taking it a step further to make sure the user experience is seamless between channels.

Creating an Omnichannel approach is achieved by:

Performing data collection and data analysis to best strategize your campaigns.



Mapping your customer journeys from discovery to purchase to ensure a seamless flow.



Creating a brand guide for anyone working on the campaigns to adhere to.



Constant testing and optimizing for bugs, speed, efficiency, messaging and more.

Sticking to an omnichannel approach will allow for a better user experience, a united brand strategy, and identity, increased revenue, and better attribution data.

03 Branding

Simply put, brand awareness is getting customers to recognize and remember your agency. During the planning of each channel of your marketing campaign, brand awareness should be considered. Building brand awareness and developing its voice. It allows customers to understand, recall, and enjoy your branding and products.

There are many ways to develop your brand; popular strategies include

- ▶ Guest blogging on authoritative websites
- ▶ Building a referral program
- ▶ Partner with local influencers in your area
- ▶ Advertise on Facebook and Instagram
- ▶ Develop your social media presence
- ▶ Create sharable content like infographics
- ▶ Have giveaways
- ▶ Collect and promote reviews from current customers
- ▶ Partner with local authoritative brands like auto dealerships and home builders
- ▶ Attend and advertise at local events

As important as it is to build positive brand awareness it's even more important to avoid negative awareness. Obtaining negative reviews or bad press can quickly affect website traffic, conversions, closing rates, and ultimately sales, much quicker than any positive reviews. This is why it's important to maintain quality and consistency throughout the customer journey.

Great Branding doesn't need to be difficult, sometimes it's simply building your identity where it's recognized locally or nationally.



Here's more information on [building brand awareness](#).

04 Website

As an insurance agency, having a website to serve your customers is expected. Early in the customer journey, users want to compare quotes, and after they sign up, they want to manage their policy online. What was once a luxury for only large carriers is now readily available for agencies to provide to their customers, thanks to technological advancements in recent years.

Providing a website that is simply visually appealing no longer gets the job done; a website needs to be built to convert prospects into customers. The information and design need to entice your users while plentiful conversion opportunities need to be provided, from chat to call or form quotes; different users have different needs.



04.01 Site Structure

When planning a website, it's best to keep your navigation and structure simple for the customer and search engines to understand.

Website structures follow either a hierarchical model, a sequential model, a matrix model, or a database model. Insurance agency websites regularly follow a hierarchical model that utilizes silos or sections. The first tier of that model will be the home page, which leads to the second tier of resources that generally starts with

- ▶ Product Pages (Home, Auto, Business, Etc.)
- ▶ About Us
- ▶ Articles/Blog Posts
- ▶ Request a Quote
- ▶ Contact Us

Keeping the website organized so each silo contains its respected pages based on topics and user intent, where blog posts are grouped, services pages are grouped, and so forth, will improve user interaction and search rankings.

Pro Tip: Incorporate breadcrumbs into your design for user navigation and SEO.

More information on site structures is provided in [Adobe's site structure guide](#).

04.02 Design & UX/CX User Experience

A website reflects your business, often the first and only visual they will have your business. When designing your site, you want it to be visually appealing so that it "wows" your audience, the colors should reflect your business, and you want to design for speed for both the user and for Google as a slow-loading website or hard-to-navigate website will affect your rankings.

The secret to web design is to create a design that a 5-year-old can use; the more intricate the layout, the more customers will get frustrated and ultimately drop out, leading to lower conversion rates and rankings.

Another thing to keep in mind is responsive design. Although pretty standard now, you want your website to look just as good on a cell phone as on a desktop, and it should load as quickly too. It's also a good idea to build designs that promote micro-interactions to keep the user interacting with the content.

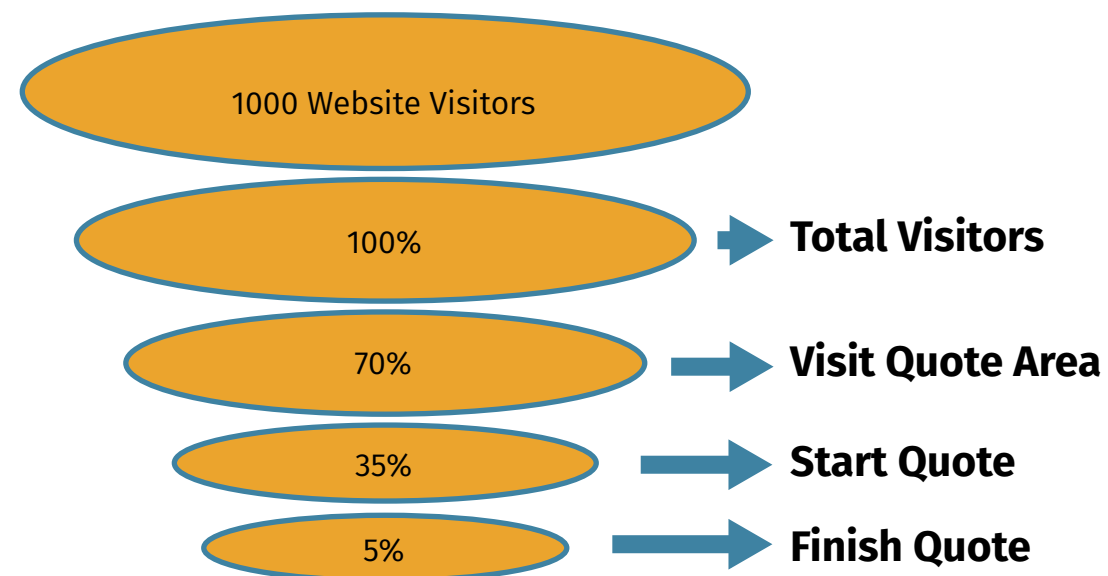
When gathering ideas for your website design, you should review competitors and note the URL and design features you like for the site designer. Gather as much info as possible and relay why you like those features.

Some more advanced design techniques include [Neumorphism](#), [Skeuomorphism](#), [Flat and Material Design](#).

04.03 Conversion Optimization

As your website design comes together, a major necessity for success is that the user interface (UI) is optimized for conversions. This means you provide adequate opportunity and influence for your site users to convert into leads through your phone, email, forms, chat, popups, lead magnets, or anything else to capture their information. It's also important to ask yourself if your offer is appealing. Your insurance policies can have the best rates and services, but if the user can't find your rates and services, nobody will know.

As with every section of this guide, conversion optimization is a skill that takes time to learn, and covering the topic from end to end would be a book on its own; so to keep this brief, we will touch on some main points to consider when optimizing your website.



A/B Testing - Researching how your audience reacts to your website is a great asset. Setting up multiple instances of the same page with a single change in design will answer the valuable question of what generates the most sales. Test designs to find what works, from the website to newsletters, testing does not stop.

Customer Value Proposition - Without properly relaying to the customer why you are the right choice, they will never know that simple. When the user arrives at your website, they will ask themselves

1. What do you do?
2. Why should they care?
3. Why should they believe you?
4. Where do they begin?

For example, a tagline "Secure your family and finances in 15 minutes or less" with trust badges, social proof, and a great CTA (Call to Action) is a good start.

Create Urgency - When complacent, it helps to give users a nudge in the right direction. Reminding them why they are here and what can go wrong without protection will lead them to create their own urgency. If it's life insurance, who's the beneficiary? Should they be left without protection if something were to happen to them?

Trust Badges & Social Proof - Get certified and accredited on-site like Independent Insurance Agents & Brokers of America and NCCI, then show them on the website. Then it's important to collect reviews on review platforms like Google and Trust Pilot and show that the general public and not just you, think you're great. Without trust and social proof, it'll be difficult to beat the competition.

Here are a few certifications, accreditations, review platforms, and trust badges for Insurance agencies to start you off.

- ▶ BBB
- ▶ Trust Pilot
- ▶ Expertise.com
- ▶ ThreeBest Rated
- ▶ NextDoor
- ▶ Google

Additional assets, including chat widgets, lead magnets, CTA (Call to Action) assets, and popups (when used appropriately), can increase conversion rates, leads, and ultimately sales.

For more information on conversion optimization, read [The User-Centric Approach to Conversion Rate Optimization](#).



04.04 Analytics & Tracking

When thinking of website analytics, many immediately think of Google Analytics because, according to Hotjar, a whopping 74% of professionals use GA. There are many providers, including Adobe Analytics, Clicky, Mixpanel, Matomo, and Similar Web. The purpose of these tools is to track users on your website.

Not only are you tracking the number of users, but you are tracking their activity, location, and time on the page, and sometimes tools like GA can provide demographics and interest.

Additional analytics tools include behavioral analytics, which includes page interaction data that can be used for heat maps.



Heatmap by [hotjar](#)

However you handle your analytics, it's important to stay within your online privacy laws. The EU has strict GDPR laws, and in the US, for example, California has CCPA.

Why do we use web analytics? Because the data can help us better serve our customers and make educated decisions on website updates to produce more leads and, ultimately, sales.

Popular Analytics tools include

- ▶ Google Analytics
- ▶ Similarweb
- ▶ Hotjar
- ▶ Mixpanel
- ▶ Chartbeat
- ▶ Clicky



04.05 AMS and CRM integrations

Currently, the web and insurance industries are going through a transformation. The new and growing technology of improved APIs, databases, software, and digital services is merging with the old technology (*cough* *cough* EZLynx) to make for better software to be used online and, more importantly, intricate with the software you depend on like your AMS (Agency Management System).

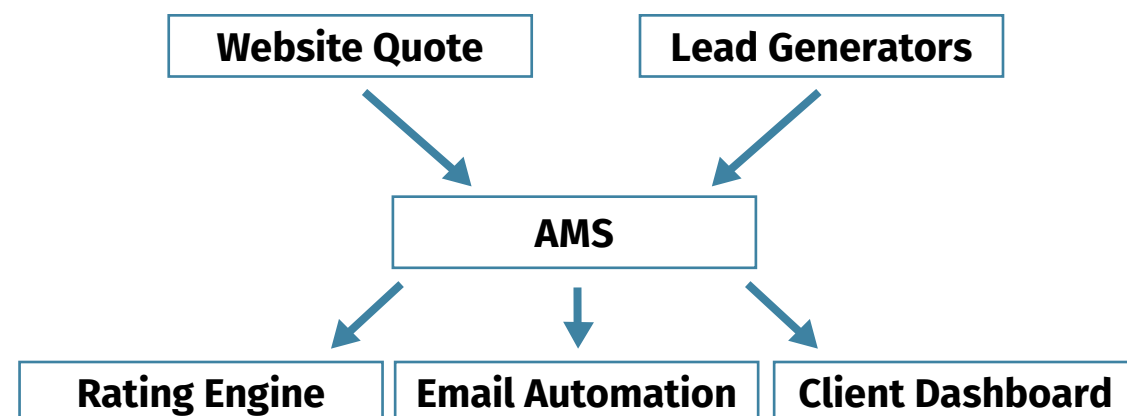
Getting your AMS, rater software, and website to work harmoniously can sometimes be challenging because the industry is catching up with today's technology and many tools. Software like Ezlynx integrates with your rater and website while providing an AMS.

Other options include keeping your popular AMS services like AMS360 and using software like Agency Revolution and AgencyZoom to link to your website to nurture your leads; the only issue with technology stacks like this is you risk losing the ability to provide online rate quotes from your rater software.

A digital agency experienced in assembling Insurance marketing stacks makes the job much easier. If you decide to develop your own stack, remember to keep the entire picture in mind. Taking the first software that is pitched to you comes with the risk of losing features, integrations with other software, and, more importantly, a loss of your time.

Here is a list of popular AMS providers

- ▶ EZLynx AMS
- ▶ Zywave
- ▶ AMS360 (Vertaforce)
- ▶ AgencyBloc
- ▶ Applied Epic (Applied TAM is old version)
- ▶ Jgenesis
- ▶ HawkSoft
- ▶ QQCatalyst
- ▶ NextAgency
- ▶ Newton Agency System
- ▶ Special Agent



05 Paid Advertising

Paid advertising for insurance agencies is a great way to jump straight to the top of search engines and target the premium qualified leads of customers actively looking for insurance services. Best of all you can target them on age, insurance type, location, and more.

Types of paid ads include

- ▶ Search
- ▶ Display
- ▶ Social
- ▶ Video
- ▶ Retargeting
- ▶ Price comparison services
- ▶ Native advertising
- ▶ and affiliate services.

Each type of paid advertising is different and has its pros and cons.

05.01 Ad Networks

Ad Networks are services that place your text or display advertisement onto a network of partner sites in front of interested users.

Some of the more popular networks include

- ▶ Google Ads
- ▶ Facebook Ads
- ▶ TikTok
- ▶ Bing Ads
- ▶ Instagram Ads
- ▶ Youtube
- ▶ Twitter Ads
- ▶ LinkedIn Ads
- ▶ Amazon Ads
- ▶ Pinterest Ads
- ▶ Apple Ads
- ▶ Yahoo Ads
- ▶ ONE by AOL
- ▶ SpotX
- ▶ Opt-Intelligence
- ▶ InMobi
- ▶ MediaVine
- ▶ Ad Recovery
- ▶ Centro
- ▶ Epom
- ▶ Propel Media
- ▶ AdRoll
- ▶ Snapchat
- ▶ Adblade
- ▶ Taboola
- ▶ Ad Maven
- ▶ BuySellAds
- ▶ Midroll
- ▶ Vibrant Media
- ▶ Yahoo Native Ads
- ▶ Spotify
- ▶ SmartyAds

Insurance ad networks like Surehites and MediaAlpha have the data and platforms required to put your ad in front of the right insurance prospects when they are actively looking for quotes.

Different ad networks host different audiences. Facebook continues to be favored by Gen X, while Gen Z, the newer generation, is currently trending toward TikTok.

Outside of age groups, we can target interests; for instance, LinkedIn hosts audience audiences with business interests, and Spotify or Midroll hosts music and podcast audiences.

Targeting is another major factor when choosing your network, as each network has different ways of targeting. Ad network targeting is the parameters you set when creating your ad and choosing whom you want to deliver your ad to, this is essential to getting your ad in front of your correct audience. For instance, Instagram uses Facebook's ad targeting, which is more nuanced compared to Google Ads targeting, which has the benefit of a wider potential reach.

Other ad networks like InMobi have less nuanced targeting of the audience characteristics but instead contain audience groups like college students, car shoppers, and fashion enthusiasts.

05.02 Ad Copy

Ad copy is a form of marketing communication that promotes a product or service in the context of an advertisement. The ad copywriter's goal is to get potential customers to want to purchase insurance services offered by your agency.

Great ad copy generally follows four rules, the first is to **solve a problem**. Some common techniques in insurance advertising include cost savings, time savings, testimonials, account services, and benefits.

It is also important to **trigger an emotional response**. Some people know what they want and are in urgent need of coverage, while others may be casually comparing quotes to their current rates and services; it's these casual shoppers we need to encourage by creating an emotional response. Rather than stating your key selling points, as in "24-hour account access, low rates, and personal service," highlight the benefits.

The next rule is to **focus on the benefits and not the features**. Stating "Save 5% today when you sign up online" is better directed at the user than "Vist today for a free insurance quote."

The last rule is to **build urgency**. Examples of building urgency in insurance is setting deadlines in your copy or when terms and rates are changing within a particular insurance service.

05.03 Landing Pages

A landing page is a page the user lands on when entering your website from a source like social media, organic listing, email, or paid ads. Its purpose is to convert users into customers.

Every landing page follows specific criteria, and the first is that every landing page needs to have a conversion point or call to action. The conversion point can be a form, phone call, messenger, or anything that converts the user into a possible customer. The second is that the page's sole purpose is to convert the user into a possible customer. By this criteria, a home page would not be considered a landing page because a home page has more than one purpose.

After launch, you will want to test and adjust your design constantly. Conversion Rate Optimization (CRO) involves testing what designs work, page layouts work, or anything else that affects the user experience and generates the most conversions. Ways to test your landing page include

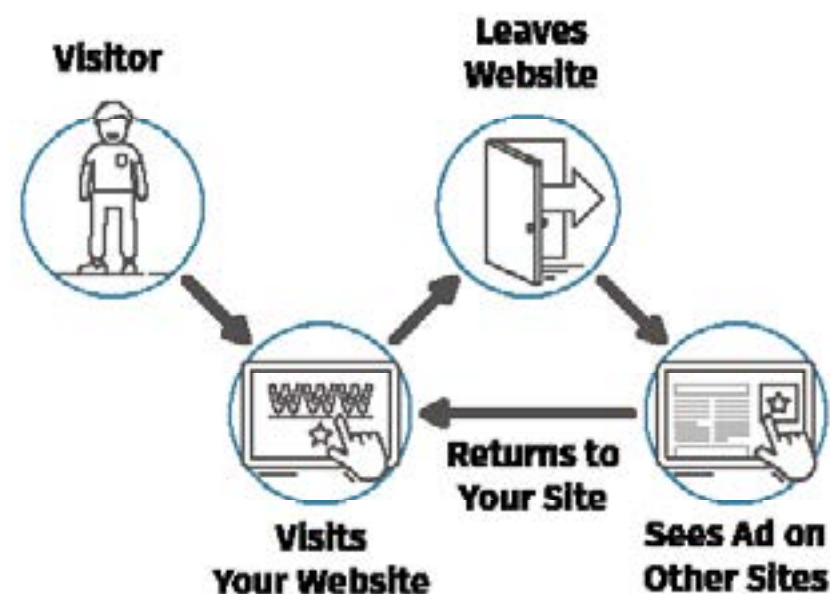
- ▶ Surveys
- ▶ Heatmaps
- ▶ A/B Testing
- ▶ Form Analytics
- ▶ Session Records

Utilizing Google Analytics, Similarweb, Hotjar, Mixpanel, Chartbeat & Clicky analytics software will collect the necessary data needed for you to analyze your campaign.

05.04 Retargeting

Traditionally, paid ad campaigns cold targeting of never before contacted users through specified criteria like age and location. Retargeting campaigns target users you have already been in contact with, for instance, those that have already visited your website, tracked property, or are targeted through a database you provide, like cold prospects in your AMS.

Retargeting of users is done mainly using two techniques, pixel retargeting and list retargeting. Pixel retargeting is a bit more common as it is a way to re-engage with past website visitors anonymously. This is done utilizing an unseen piece of Javascript (often referred to as a pixel) shown on your browser, making the browser cookie you as a user. When you continue to view other web pages from your browser, the cookie sets off a retargeting platform that serves you a specific ad.



The use of retargeting in most campaigns is to achieve several goals. Goals include generating awareness of your brand or services, completing the buyer journey by staying in front of users after they have researched a similar topic earlier in their journey, increasing conversions or reducing form abandonment by getting in front of users after they have dropped out of a quote form, increasing your customers lifetime value by staying in front of them when researching certain topics and competitors, or introducing new services to current customers.

There are many retargeting platforms as almost every paid ad service offers it in one way or another. Some of the more common retargeting platforms include

- ▶ Google Adwords
- ▶ Sharpspring
- ▶ Adroll
- ▶ Retargeter
- ▶ Facebook Ads

As always, make sure you track progress and update your audience databases when needed. Retargeting requires testing, optimization, and maintenance.

Pro Tip: If you use a CRM, you can sync your existing client and prospect lists with your retargeting platform to create audience members to target or members to ignore

05.05 Lead Providers

PPL or Pay Per Lead is an affiliate marketing program that allows agencies to purchase qualified leads directly from the affiliate with no ads, websites, or SEO. These leads must meet a minimum quality standard that the advertiser and affiliate agree to at the beginning of the campaign.

The cons of PPL are that the system can be abused by the affiliate, causing issues for the advertiser. Common issues include not meeting the quality criteria, selling the leads to multiple advertisers, or using non-ethical methods of generating the leads.

06 Organic SEO

Organic SEO (Search Engine Optimization) is a major leader in traffic and lead development. For many, the heart of their digital marketing campaign is their organic SEO.

Organic SEO is a method to attain increased rankings in search engine results pages (SERPS), thus increasing targeted organic traffic. This is accomplished by utilizing strategies such as optimizing web pages, incorporating quality content, optimizing metadata, and developing backlinks.

Although SEO can cost more up-front, it's considered a smart investment long-term since, unlike paid ads, you retain either ownership of your web properties or the ability to continue to benefit from developed properties after everything is paid; where paid ads the benefits immediately stop when the payments stop.

06.01 On-Site & Off-Site SEO

The term SEO refers to Search Engine Optimization both on your website and off your website, or on-site SEO and off-site SEO.

On-page SEO is a term that refers to optimizing the SEO factors that are on your website or domain. Examples of on-site SEO include optimizing for

- ▶ Meta Descriptions
- ▶ Title Tags
- ▶ Header Tag (H1, H2, H3, etc.)
- ▶ Inner link building
- ▶ Schema
- ▶ Site structure
- ▶ E.A.T (Expertise, Authoritativeness, and Trustworthiness)
- ▶ Content Writing
- ▶ Image Optimization
- ▶ And More

Off-page SEO is a term that refers to optimizing SEO factors that are off your website or domain including social media properties, web 2.0 properties, authority website properties or any website outside the ones you own, citation properties, and more. Examples of off-site SEO optimizations include

- ▶ Link Building
- ▶ Citation Development
- ▶ Anchor Text
- ▶ Social Media
- ▶ Brand Building (Linked & Unlinked)
- ▶ Content Marketing
- ▶ Influencer Marketing
- ▶ And More

Truth is, there are more than 200 ranking factors, and not everyone has the time or budget to cover them all, so it's important to develop quality content from the beginning and complete your basic optimizations as you go along.

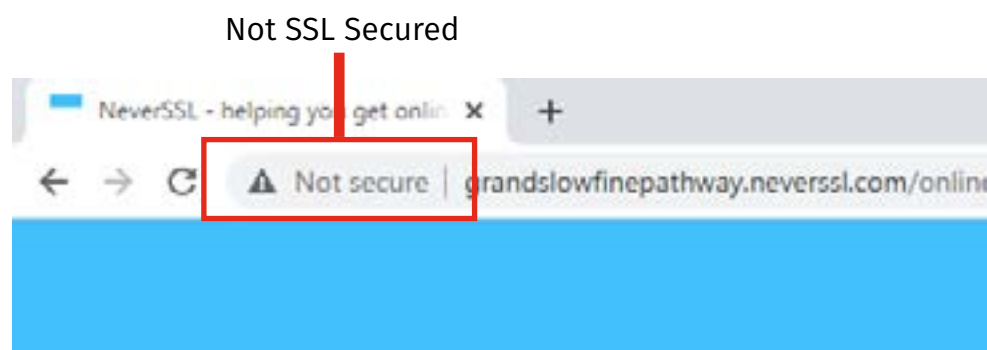
06.02 Technical SEO

As with anything, having the right tools for the job and keeping them working in top shape is essential to success. Technical SEO is focused on the technology and that it is being used properly.

Some tips for improving your technical SEO include

- ▶ SSL secured
- ▶ Responsive design/mobile optimized
- ▶ Site speed optimization
- ▶ No duplicate content
- ▶ XML sitemap
- ▶ Structured data markup
- ▶ Google Search Console and Bing Webmaster Tools setup

Optimizing and managing your [Technical SEO](#) is simple, most tools including SEMRush and Ahrefs provide monitoring for many of your site's technical metrics. After completing your technical SEO before the site launch, most metrics simply need to be monitored with seldom updates.



06.03 Keyword Research

Performing proper keyword research will be necessary to satisfy both users and search engines. During your keyword research, you will find what people are searching for, how many, and what format they want it in. This will be essential to your content strategy if it's going to be successful, and a successful strategy leads to more traffic and thus more sales.

Before performing your keyword research, you need to understand more about your target audience. If we are developing a campaign for auto insurance, some questions we may ask about our audience include

- ▶ What auto insurance are people looking for?
- ▶ Who is searching for these?
- ▶ When are they searching for auto insurance?
- ▶ How are they searching for auto insurance?
- ▶ Why are they searching for auto insurance?
- ▶ Where are they searching for auto insurance?

Listing the answers to these questions will not only define the intent of the users you are targeting but give you a great starting point to expand on for your research.

There are many different types of keywords, and it's important to incorporate them all into your campaign. Incorporating each type of keyword into your content schedule will ensure you capture the most traffic possible. Types of keywords

Short, Mid & Long-Tail - Keyword length. Example for short is "car insurance", mid is "purchase car insurance" and long is "purchase car insurance with full coverage"

Evergreen - Sustainable keywords that remain relevant over time

Trending - Time-sensitive and trending, for example, "Texas home insurance rates hike"

Customer Defining - Describes the buyer, for instance, an auto insurance campaign would include "Driver"

Geo-Targeting - Includes the location you are targeting, for example, "Austin auto insurance"

Intent Targeting - Focused on the intent of the user during certain points of their buying journey, example, "RV insurance quote"

Competitor - Pick up some traffic from your competitors, for instance, "the zebra insurance quote"

LSI - Latent Semantic Indexing are related to your main keyword and are seen as semantically relevant

Broad, Phrase & Exact Match - Different levels of keywords that match your term with broad match relating to keywords most loosely matching your term and being the exact term

Product - Keywords related to the product you sell, example "auto insurance" & "home insurance"

Vertical - Related to your product or service, for example for "home insurance" people may need "flood insurance" or other add-ons

Using your keyword tools like Google Keyword Planner or SEMRush, start creating a list of all the keywords you can find relating to your campaign. This is also a good time to research your competitors to see what they are targeting and how they rank. Competitor research is a great way to see what is working and what's not when it relates to any portion of the SEO process.

After gathering your keywords, you will develop your content strategy while taking into consideration the relevance of the keywords to your campaign, the amount of authority needed to rank, and the volume of traffic the keyword delivers.

At the beginning of your campaign, it's best to prioritize the low-hanging fruit that requires low authority from your site. As your campaign develops, you will be more in a position to rank for authoritative, high-traffic keywords. One trick is to see how your competitors are ranking for your target keywords.

Researching keywords for your campaign can be tedious, but incorporating the best available tools into your process can save you time. Tools for keyword research include

- ▶ MOZ, Ahrefs & SEMRush Keyword Tool
- ▶ Google Keyword Planner
- ▶ Google Trends
- ▶ Answer The Public

06.04 Content Creation

“Content is king” is a term used heavily in the SEO community. Some think the term is overused or simply not true, it’s some people’s belief that simply by developing quality content on and off-site that you can rank any website for anything. Others believe a balance on both sides of the coin leads to a successful campaign.

Content is often times thought of as blog posts or written content, but the truth is in today’s digital universe, content comes in many forms. Examples of common content types used today include

- ▶ Videos
- ▶ Live Videos
- ▶ Blogs
- ▶ Social media posts
- ▶ Guides
- ▶ Infographics
- ▶ eBooks
- ▶ Downloadable content
- ▶ Podcasts
- ▶ Paid Ads

When planning your content, you need to understand your audience and their goals. This is done through research, research that comes in many forms, including competitor research, keyword research, paid ad research, trends research, social media research, and more. For many, keyword research is the heart and where you should begin your content planning.

Once the research is complete, your goal is to know not only the topics you will be writing but why you are writing for your user, how to achieve your campaign goal, how to distribute your content, how your topics should be clustered together, and what will be your metadata (Titles, Descriptions, Etc.).



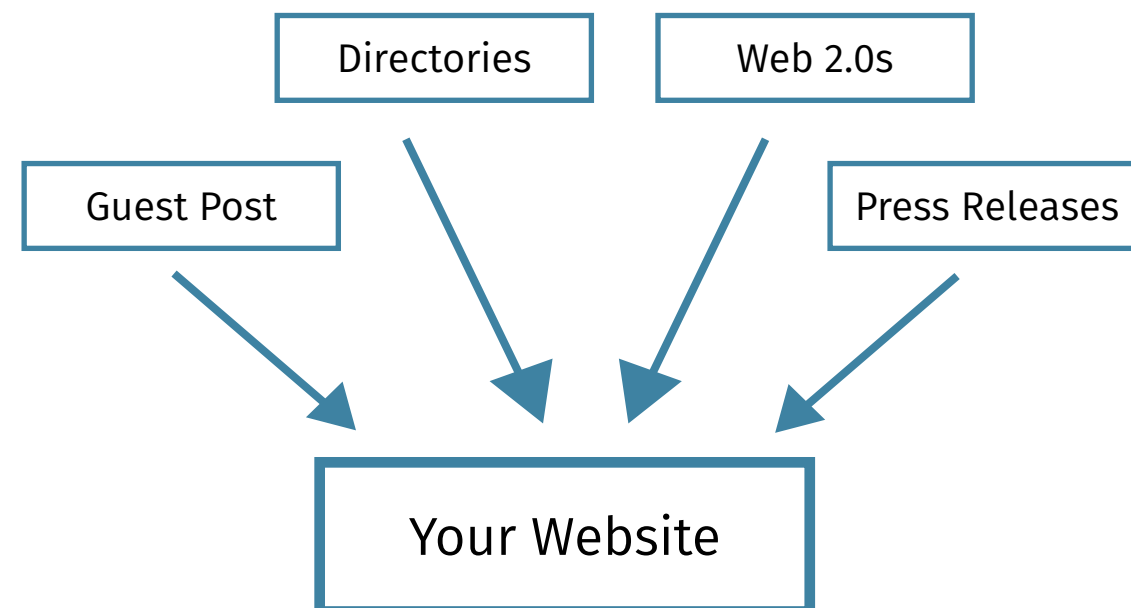
Google Podcasts



06.05 Link Building

Developing backlinks, or link building, for your website, is the act of getting other websites to link to your website, for example here. In an oversimplified definition, these links are an indicator to search engines like Google that your website is a source of information on that particular topic; thus, the search engines rank you higher for that topic.

In the early days of search engines, the website with the most links would rank highest for the target keyword, this quickly evolved to more intricate ranking algorithms as black hat SEO specialists would abuse this ranking factor and spam un-authoritative backlinks to their website to cheat their way to the #1 rankings.



Strategies for link building vary, although some of the more common strategies include guest post outreach and citation development, here are some additional link building strategies

- ▶ **Guest Post** - Outreach to other websites where you provide an article with a link to your website
- ▶ **Skyscraper** - Outreach to other websites where you can provide a better resource to link to than what they are currently using
- ▶ **Broken Links** - Contacting website where they link to 404 (broken) pages and you provide a new, working resource to link to
- ▶ **Infographic Promotion** - Infographics are a great visual to showcasing data or providing instructions on a task so a well-made infographic can be syndicated to multiple sites with a link back to you the author
- ▶ **Link Roundups** - Link roundups is when a group of SEO specialists agree to link a group of websites to one another
- ▶ **Influencer Outreach** - From social media to Youtube and self-hosted websites influencers are everywhere and whether it's a paid sponsorship or you are a guest, many times you can request a link to your site
- ▶ **Moving Man Method** - Find dead links pointing to shut down businesses
- ▶ **EDU Resource Page** - Many schools offer a resources page on their website for students if you offer a student discount or anything related it is possible they will link to your website
- ▶ **Podcast** - Links from attending or sponsoring podcasts
- ▶ **Guestographics** - Graphics to be used on guest websites
- ▶ **PR Link Building** - Links earned through general public relations for instance if you are featured in the local news and they link to your website
- ▶ **Image Attribute Links** - Gain links from creating images that require an attribution link like Creative Commons Images

Not all link-building strategies are listed above. There are many ways to get creative in earning links from other websites.

It's important to research the websites you are interested in before you reach out for a backlink. Many websites can be spammy from black hat techniques described earlier or the website simply doesn't receive any traffic. Either way, it is important to know the quality of the website that will be linking to you before you put in the work to earn that link.

Popular Backlinks Lists



06.06 SEO Tools

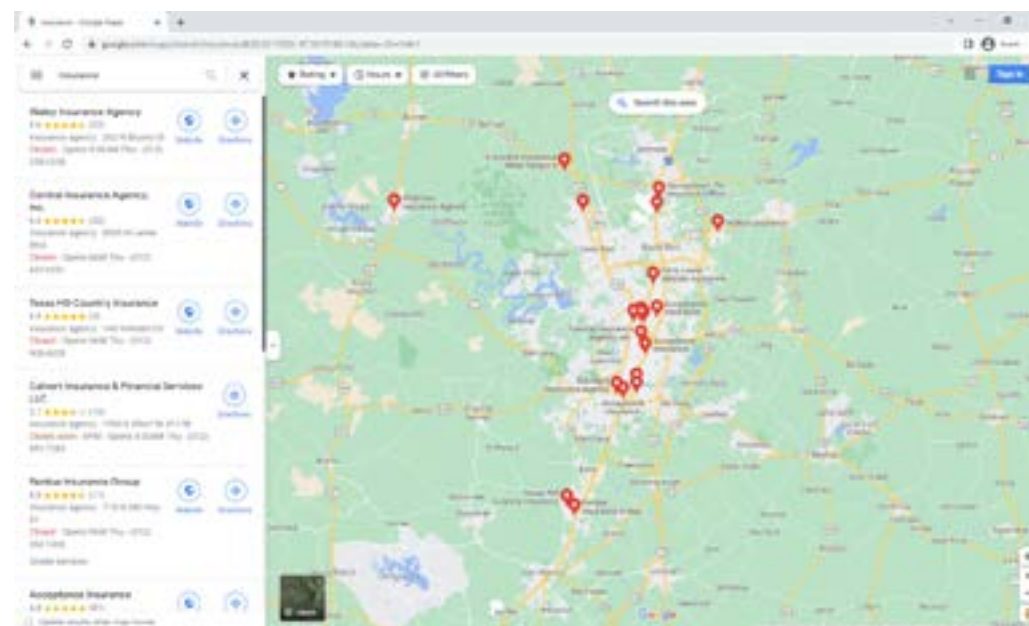
Today, there are thousands of SEO tools to choose from with many specializing in their own individual purposes. It's this reason that many SEO professionals have dozens of tools to rely on costing them thousands each month.

A few of our favorite tools include

- ▶ Google Analytics - website traffic data
- ▶ Ahrefs - backlink analysis
- ▶ SEMrush - SEO research
- ▶ Keywords Everywhere - keyword data... everywhere
- ▶ Screaming Frog - site crawl for technical SEO
- ▶ Agency Analytics - metrics hub & reporting
- ▶ Brightlocal - local SEO
- ▶ Buzzstream - link outreach

07 Local SEO

Developing your local traffic is a great way to target some of the low-hanging fruit, not to mention lots of insurance-related traffic tend to tie closely to local cities, zip codes, local trends like hurricanes and laws. Developing your website to be an authority within your target cities and metro areas is almost required for success in today's online search environment.



07.01 Local SEO Keyword Research

When developing your [local SEO](#) keywords, you will sometimes need to get creative, especially in cities with lower population density.

First, you will want to gather your main keywords like “auto insurance”, “home insurance”, etc., and incorporate them with your target cities. Later you will want to develop local pages for your target cities, an example is “auto insurance Atlanta”.

After a healthy list of your main keyword and city combinations are complete, you will be able to expand to other topics that are related to your keywords. A few great resources to accomplish this include Google Suggest, Yelp Suggest, Thumbtack Suggest, Local Voice Search, Google Keyword Planner start with a website option, SEMRush, and more.

Incorporating these local keywords into your service pages, local pages, and blog content will develop your local authority for your targeted local keywords.

07.02 Google My Business

Your Google My Business listing is a major asset to your online campaign, some consider it to be more important than the website itself. When creating your listing it is important that all your info is 100% correct and consistent. Also, be sure to fill out every possible data field within your GMB profile and include images where possible.

After your profile is complete you will use this profile as a guide to all future listings, it's important that all other profiles on sites like Yelp and Yellow Pages match exactly your GMP name, address, and phone number or NAP. A correct and consistent NAP through all online properties is a major ranking factor.

In addition to your local rankings and search appearances, developing your GMB profile will have you appear locally on Google Maps for additional lead opportunities and local customers

07.03 Local Ranking Signals

As with general SEO, the number of ranking signals for a local campaign is astounding so we are going to cover just a few we feel stand out.

As mentioned your NAP appearing online is a major signal and it is consistent so a NAP audit is required, to correct the NAPs with errors. With the correct NAP, you can move on to citation development, citations being anywhere like Yelp or Yellow Pages that list your NAP.

Another major signal is online reviews. Google reviews, Facebook reviews, Yelp, and more are all taken into consideration. Showcasing these reviews on your website can help search engines correlate the reviews to your business. Search engines will also take into consideration data like user sentiment, user check-ins, and keywords used in the reviews themselves on how they relate to your business.

Website updates like SCHEMA, social media links and share options, city and keyword usage, local pages targeting cities, title tag cliffhangers, and locally targeted content can all develop your authority and rankings for local traffic.

Off-site updates outside of your NAP usage can include backlinks. Backlinks from trusted local sources like your Chamber of Commerce or local news can be a major asset in your local rankings and traffic development so be sure to incorporate a backlink where possible into local events and activities your agency is a part of.

07.04 Additional Local SEO Tips and Strategies

A few pro tips to incorporate into your campaign when developing your local SEO

- ▶ Develop a local city page for each targeted city, especially for each business location
- ▶ Include SCHEMA
- ▶ Embed a Google Map
- ▶ GEOtag images
- ▶ Use location-focused keywords above the fold
- ▶ Optimize the title tag and meta description for local search
- ▶ Embed a Google Map on your About page
- ▶ Use Your Location-Focused Keyword Above The Fold
- ▶ Title Tag Double Dip

08 Social Media

Incorporating social media into your campaign is not only a great way to increase brand awareness and build trust, but it's a great way to generate traffic, generate leads and develop rankings for the website itself.

According to Search Engine Journal, the top 10 social platforms in 2022 are as followed in order of Monthly Active Users

- ▶ Facebook
- ▶ YouTube
- ▶ WhatsApp
- ▶ Instagram
- ▶ TikTok
- ▶ Snapchat
- ▶ Pinterest
- ▶ Reddit
- ▶ LinkedIn
- ▶ Twitter

When it comes to an insurance campaign, we find it's best to start with Facebook, YouTube, Instagram, and TikTok.

08.01 Content Scripts & Formats

When developing your social platforms, following certain scripts can set the tone for your brand and build confidence. Several common scripts in marketing include

- ▶ Informational
- ▶ Promotional
- ▶ Video caption
- ▶ Current events
- ▶ Testimonials

Different content formats can have various effects on your branding. For example, local polls and competitions can build interaction, tips and tricks can build authority, and trust can be built by sharing customer testimonials.

A few formats to start with include

- ▶ Polls and competitions
- ▶ Tips and tricks your customers should know
- ▶ Answers to customer FAQs
- ▶ Infographics
- ▶ Circulate posts on your blog
- ▶ Local Insurance related news
- ▶ Short interviews with agency reps
- ▶ Local events
- ▶ Holiday posts
- ▶ Videos, especially how-to videos
- ▶ Charity events and fundraisers

Developing a content schedule that includes a healthy mixture of the above formats and scripts is a great way to develop your social media presence and brand.

08.02 Best Practices

Growing your social media can be difficult enough on its own; not following general best practices can make the difficulty even worse.

Before and after the launch of your campaign, keep in mind to properly optimize all properties for SEO. This starts with your profile and continues with your regular content posts. NAP (Name Address Phone), Hashtag usage, Descriptions, Hours, and Backlinks are great places to start with profile optimization.

Knowing when to post on the different social media platforms is important as it can significantly affect your interaction rates. It's also important to consider whether you are targeting consumers or businesses, as this can affect your posting time. Research or analyze what times work best for posting content depending on your platform and line of insurance.

How often you post can also affect your interaction rates. Limiting your post rates to roughly 3 times a day for platforms like Twitter or TikTok and 2 times a day for Facebook and LinkedIn is a great place to start testing. Moving forward, try increasing or decreasing your post rates to see how they affect your interactions.

Moving forward, you can perform A/B testing to see what changes you can make to improve your KPIs. Changes like the use of emojis, use of hashtags, and copy used in posts can all have a positive or negative effect. Keep in mind ranking factors include shares and likes so improve those interactions if you want better trending posts.

The last note is on paid ads. As with your website, you may want to consider a budget for paid advertising to boost posts and generate a following of fans if you want your campaign to get off the ground quickly.

08.03 Branding

Staying on brand is important anywhere, although it is particularly important on social media. Social media is your brand's way of communicating daily and directly with customers by telling them who you are while giving your agency a chance to build authority and trust. For these reasons, it's your opportunity to build your brand in the public eyes as you see fit.

When building your campaign, it's important to have consistency throughout your social platforms. This can be done through a consistent profile and cover graphics along with consistent color schemes and palettes. Once planning is complete, graphic templates with standard lower thirds or logo placements will help streamline content development.

Another thing to keep in mind is you will likely have different marketing personas for your different insurance lines or even services. Targeting commercial and personal lines are likely to have different personas, but you are also likely to have different personas for long-term care and recreational vehicles, so as your campaign develops, don't shy away from developing additional accounts for specific personas

09 Email Marketing

Email marketing is an essential way to perform outreach to new leads, nurture current leads, follow up on previous leads while retaining and upselling current customers. Incorporating emails into your marketing campaign is a great way to develop your brand, tell a story and build trust with prospects.

Types of emails you can incorporate into your campaign include

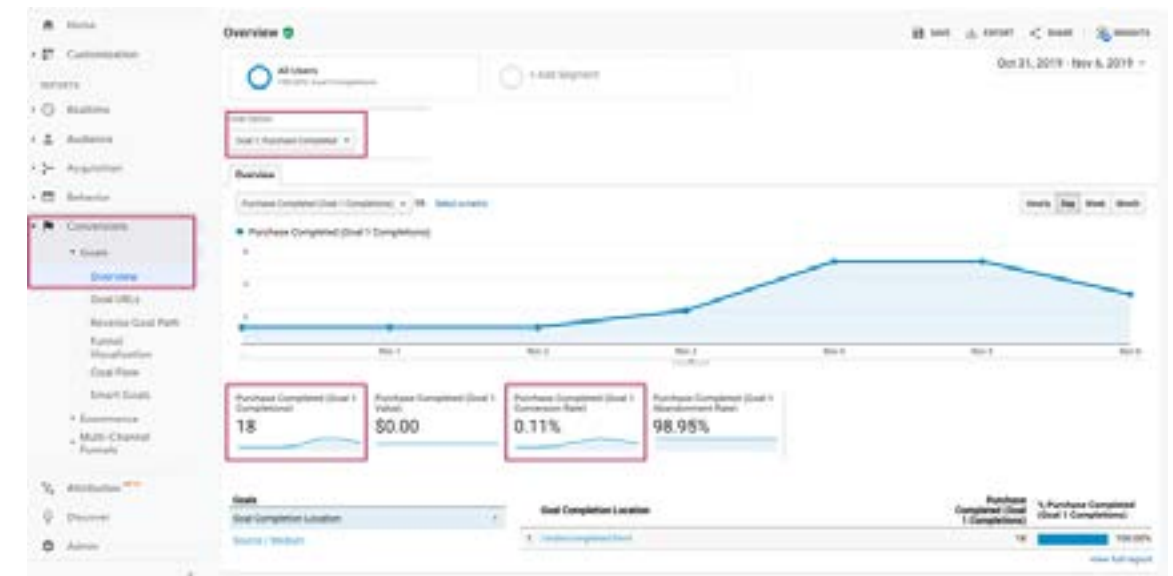
- ▶ Welcome Emails
- ▶ Follow-Up Emails
- ▶ Birthday Emails
- ▶ Event Emails
- ▶ Season's Greetings
- ▶ Reminder Emails
- ▶ Cold Emails

When building your email marketing campaign, it's important to develop your campaign in a way that is automated and streamlined as possible.

09.01 Decide Your Goals

Whether you want to develop new leads, nurture current leads, or increase your renewal rate with current customers, it's important to lay out your KPIs (key performance indicators), so you can track your success and adjust for the failures. These stats can be tracked through your EMS (email management system) or analytics software.

Analytics Goal Tracking



09.02 Make Your Emails Contextual

Depending on the insurance line you're promoting, you want to write your emails in a way that relates to their business, life events, local events, or social events. Incorporating the appropriate information into your emails will help the recipient know if your email is relevant or not, thus increasing your open, click-through, and conversion rates.

A great way to increase conversions is to get detailed with your placeholder/merge fields while keeping the email short and to the point. Incorporating details about the customer, like policy information, can improve user interaction rates.

When contacting cold leads, it helps to have templates specific to each policy type the prospect is shopping for. If the prospect is searching for auto coverage, stay on the subject, be helpful, build urgency, stay in front of them during their buying process, and include your agency's key selling points.

09.03 Integrate with Your Website and AMS

These days, most agency management systems can be incorporated into your website and can create email campaigns pulling directly from the built-in CRM, or there is specific software that can integrate into your CRM to execute your email campaign.

This also helps when your campaign utilizes rating engines, comparative rater software, lead generators, and more. Integrating your software to work seamlessly will save you many overhead costs in the long run and allow you to focus on improving things like interaction rates.

Some of the major AMSs like EZLynx, Zywave, and AMS360 have a few of these features, but you will find you may need to integrate 3rd party software to gain other features.

10 Content Marketing

Content marketing is a great way to educate, amplify your brand, solve problems, tell stories, build strategic partnerships and differentiate yourself from your competitors. Content marketing is a marketing strategy that incorporates the creation and sharing of online content. Some online content ideas include

- ▶ Videos
- ▶ Live Videos
- ▶ Blogs
- ▶ Social media posts
- ▶ Guides
- ▶ Infographics
- ▶ eBooks
- ▶ Downloadable content
- ▶ Podcasts
- ▶ Paid Ads

Incorporating customer journey content into your content plan is a great way to get in front of your customers at the most critical parts of their journey, this includes creating content for the customer's awareness stage, consideration stage, and decision stage. Useful tools like online rate quotes are a great example of getting in front of the customer at the right time and stage.

When creating your content, it is important to follow best practices, including research topics that generate traffic, linking internally to keep the traffic, and including a call to action to convert traffic.

11 Video Marketing

A video marketing strategy is a powerful way to market your agency. It's proven that videos have higher conversion rates than text or images; they help SEO, increase traffic, and help create an emotional connection with your target audience to influence their buying decision.

Video marketing comes in many forms these days; a few examples for agencies include

- ▶ Welcome videos
- ▶ Customer testimonials
- ▶ Live videos
- ▶ Dead leads videos
- ▶ Insurance video webinars
- ▶ Explain a claims process
- ▶ Non-insurance videos
- ▶ Vlogs
- ▶ Social Media Stories
- ▶ User-generated content

Short easy videos utilizing original content can have low production cost and make your content easy to digest. It's important to SEO optimize the content and include subtitles for social sites like TikTok and Facebook.

When it comes time for distribution, it's important to incorporate a variety of distribution channels. A few of the more popular channels include

- ▶ Video host (YouTube)
- ▶ Social Media (Instagram & TikTok)
- ▶ Your website
- ▶ Newsletter
- ▶ Guest posts

Proper distribution and hosting of your videos will increase traffic, rankings, trust, and leads.

Fusion Digital Marketing

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