

Creating a Facebook Page

For Insurance Agents & Agencies



Creating a Facebook business page for your insurance agency can be a massive boost for lead generation and help you establish a presence online. It is also relatively simple; you should have all of the images, text, and ideas you'll need to create. All you need is a bit of time to sit down and get it up and running.

No matter your target market – they are most likely on Facebook. For many, Facebook is where they go to find local businesses or find reviews on companies.

Let's get into the steps you'll need to create a Facebook business page – start now, and you'll be able to publish your page by the end of the day.

Step 1: Log in

Before you can make your Facebook business page – you will need to be logged in to your Facebook account. Don't worry – your personal information will not be visible on the business page. If this is still a concern, you can create a separate Facebook account for yourself solely for work and business purposes. So, if you have not already, **get logged in or create an account** to begin.

Step 2: Sign Up

First, go to **facebook.com/pages/create**

Then, select the type of page you will create (for your insurance agency, this will be business) and click **Get Started** for that option. Next, you will be prompted to enter your insurance agency's information. First will be your agency's name, or your name if you are an independent insurance agent.

For category, **choose an insurance agent or broker** – whichever best applies to you or your insurance agency.

After choosing the category, you will be asked for more details, such as address and phone number. You can determine what information is shown publicly on your page. After this, click continue. Be sure to look over **Facebook's Pages, Groups, and Events Policies** before proceeding.

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Step 3: Add Images

Now it is time to upload the profile and cover photos to your page. These are key in creating an excellent first impression for people visiting your page, so choose wisely. Make sure the images you choose are easily identifiable to your insurance agency.

First, you will **choose a profile image** – it will show alongside your insurance agency name in search results and interactions. It also will show at the top left of your Facebook page. If you are an insurance agency, your logo is a safe way to go for this image, but a headshot will also do if you are an independent insurance agent. The important thing is that your profile image is recognizable to people as soon as they visit your page. **Your profile picture will be cropped in a circle, so ensure no critical details get left in the corners.** Once you've picked a photo – click upload profile picture.

Now you will choose the most prominent image on your page – **the cover photo**. Some good options are a photo of your office exterior or a professional group photo of your insurance agent team for your insurance agency. **The image size recommended is at least 720 x 315.** Once selecting an image, choose to upload a cover photo.



Now you have the skeleton of your insurance agency's Facebook page. Before publishing the page, you still have a little work to do. No worries – no one can see the page yet; what you see now is a preview.

Step 4: Choose a URL

Your vanity URL is also called your username; it tells people where to find you on Facebook. It can be as many as 50 characters, but you want it to be simple and easy to remember. **Use your insurance agency name or some simple variation of it.** To set this up, click **Create a Page @username**.

Click **Create a Username** when you're done. Then a box will appear to show you the links people can use to connect with your insurance agency's page via Facebook and Messenger.

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Step 5: Add more details

It might seem tempting to save these for later but resist this urge. It is essential to fill out all of the fields in your pages About section right from the start. Facebook is sometimes the first place a potential customer may get information about you and your agency – having it all is essential. If they are looking for someone to call today – they need to see your hours to see if you are still open. If they can't find that, they'll keep looking until they find a page where they can confirm that information. To begin with, these details, click edit page info at the top menu. Now, you can share all of the vital information about your insurance agency.

Description

This is a short piece of text that will show in search results. It only needs to be a **quick, few sentence description of your insurance agency** (max. 255 characters). No need to elaborate much here; there is a place for that later.

Contact

Here is where you will add all of your insurance agency's contact details that you want to make public such as **email, website, and phone number.**

Location

If you are an agency with a physical office, **check to see that your office location is marked correctly on a map.** You can also add details about the areas that you sell in.

Hours

This is where you will **add your specific business hours** – these will also show in search results.

As you go, click **Save Changes** under each section to ensure your work is kept.



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Step 6: Tell your story

Your page has all of the simple details but still does not have good reasons why prospects should work with your insurance agency. Fortunately, there is a section called **Our Story** on the page where you can add a longer description for your insurance agency. To access this, **click See more, About, and then click Our Story on the right.**

Here you can add a detailed description of what your insurance agency offers and why clients should like or follow your page – as well as why they should work with you. This is where you should provide a compelling reason for people to stick around. **When you're finished, add a headline and relevant photo. Then click publish.**

Step 7: Create a post

Before you invite anyone to like your insurance agency's page – **post some valuable content.** This can be your posts or even sharing posts from pages that are relevant to your target market. No matter what it is, make sure the posts offer value to prospects when they click on your page, so they will be more inclined to stick around.

Step 8: Publish and Invite

Now your insurance agency's page is ready to become a powerful online presence, making potential clients feel comfortable interacting with you. **Now, you should hit the Publish Page button on the left-hand side.** Now your page will be live to the world – the next thing you need is some followers.

Begin with inviting your Facebook friends to like the page, and then promote the page on your other social media. Add a **"follow us on Facebook"** button to your marketing materials, email signature, and website. If you are so inclined, you can ask current clients to leave you a review on Facebook.

Step 9: Optimize your Facebook page

Now that you've mastered the basics, you need to work on optimizing your Facebook page for your insurance agency. This will help maximize engagement, helping increase lead generation and sales.

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Call to Action

You won't provide prospects with all of the information they need directly on your public Facebook page. However, you can give them a way to get it with a Call to Action (CTA) button.

The right CTA can help people request a quote, book an appointment, or request more information about your products – it all depends on how your insurance agency does business and your needs. This can be a great lead generation tool.

Click the blue box that says **+ Add a button** to pick which kind of button you want. For all of the different CTA types, you will be given other options to choose from. Choose what works for you, and then click Next. Depending on your choices, you might be asked some additional questions. When you're ready, **click finish** to have the CTA go live.

Pinned Posts

Is there an important post you want your visitors to see when coming to your page? A top-performing piece of content? **A pinned post will sit at the top of your page, under the cover photo.** This is an excellent place for an engaging post that will encourage prospects to stick around. Once the post is published, **click the three dots at the top right of the post** and then **click Pin to Top of Page**



Use Template and Tabs

Tabs are like different sections such as the about tab and photos. You can choose which tabs you want to pick and the order they appear in the left menu of your page. If you aren't sure which best suits you – check out Facebook's various templates. **To access this, click Settings in the top menu and then templates and tabs on the right.**

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Like Other Pages

It is a good idea to build a community with other local businesses on your insurance agency's Facebook page. One way is to follow other local companies such as non-profits, medical centers, churches, and other local shops and businesses, helping you build rapport and trust with people in your community and online.

To follow a page as your insurance agency, **click the three dots under a page's cover photo. Then, click Like as Your Page and click submit.** This business will now show as **"pages liked by this page"** on the right of your insurance agency's Facebook page.

Review Settings

Your Facebook page settings allow you to detail who can admin your page, where posts are visible, banned words, and more. You can also see your likes and control your notifications. **Take a few minutes to review your settings every so often** to make sure it is optimized for what you want for your insurance agency.

Page Insights

The more info you have about your audience, the most you can learn how to understand what they want. Facebook page insights make it easy to get data about how people interact with your page and content. **To access this, click insights at the top menu of your insurance agency's Facebook page.** Here, you will find information about your page's performance, such as data on demographics and engagement. You can see data to understand how many people you reach and comments and reactions on specific posts.

You can also see how many people have clicked on your CTA button, website, phone, and address. This data can even be divided into demographics such as age, gender, city, and device. This will help you see if you are reaching your target market and how to do so better. **To access this, click Actions on Page in the left menu.**

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Backlink, Backlink, Backlink!

Backlinks help with credibility and may improve your page's SEO ranking. They also help direct people to your insurance agency's page. Include a link to your Facebook page below any blog posts and wherever else appropriate, such as website, emails, and other social media.

This should give you a pretty good start to how to create a Facebook page for your insurance agency. For more information, contact Agent Pipeline today!

