

# Connecting with clients through social media



**Who is this guide for:** Advisers

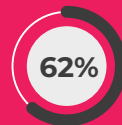
**What is the aim:** To showcase the importance of social media as a tool to connect with clients, with tips on how to get started.

With the majority of the world's population using social media, and the **average person spending 6-7 hours a day online**, there is a big opportunity to use this online resource to reach a diverse global audience – in an instant.

In fact, research shows that more and more people **are going online for financial advice:**



**80%** of young adults have used social media for financial advice.



**62%** feel more empowered by their access to financial advice on social media.



**50%** of financial service decision-makers use social media to evaluate service providers.

## Drive engagement; attract new clients

**The benefits of embracing social media as a communication platform are extensive.** Using this channel can help you keep conversations going with clients, boost their trust in you and enhance the value they see in your client-adviser relationship.

**Social media thrives on positive, shareable content – especially when it comes to health and wellness. This is particularly useful when targeting a younger, healthier audience which can help you to grow your client base through access to these new markets.**

Social media also gives you the opportunity to build both your personal and professional brand, and to position yourself as a thought leader in your industry.

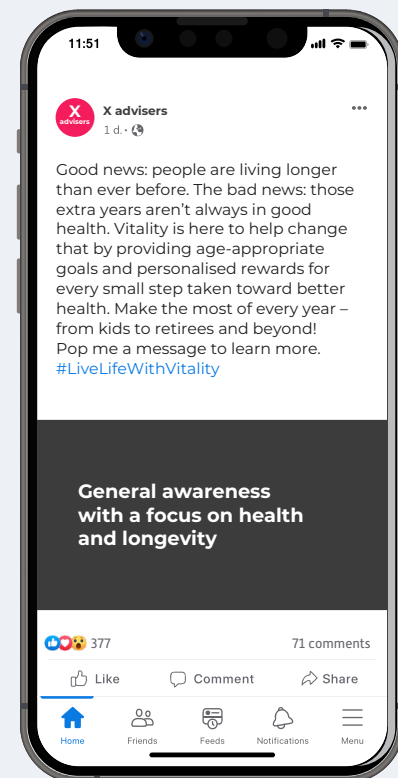
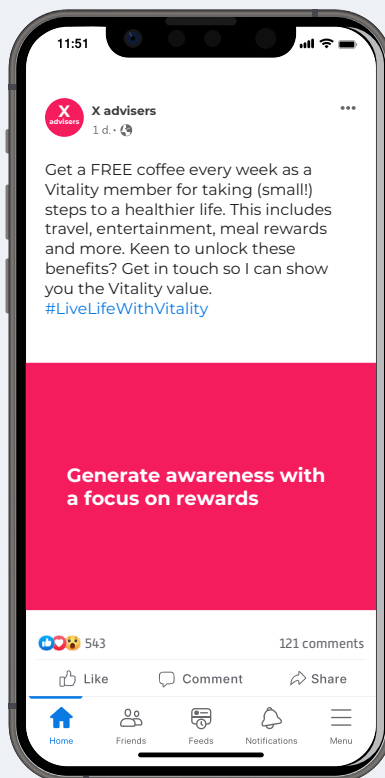
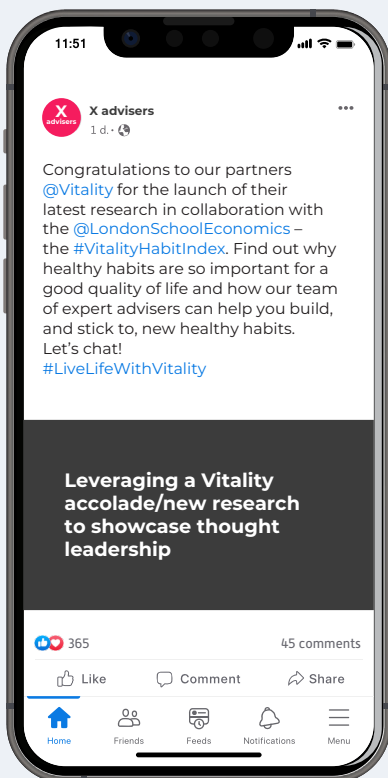
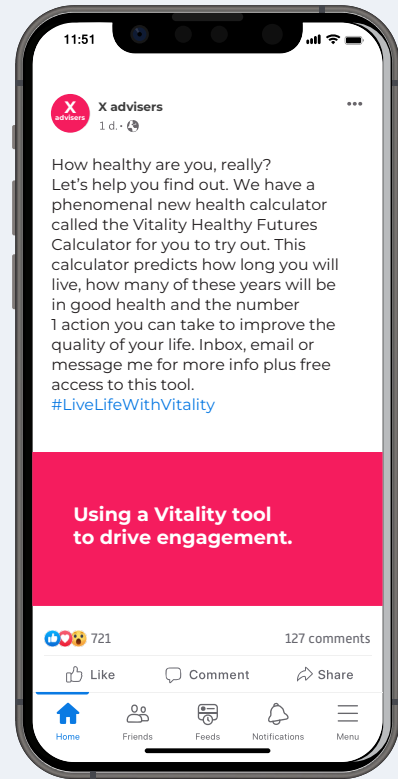
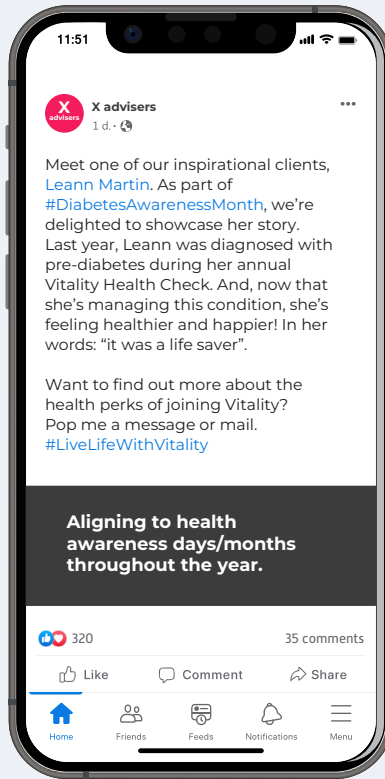
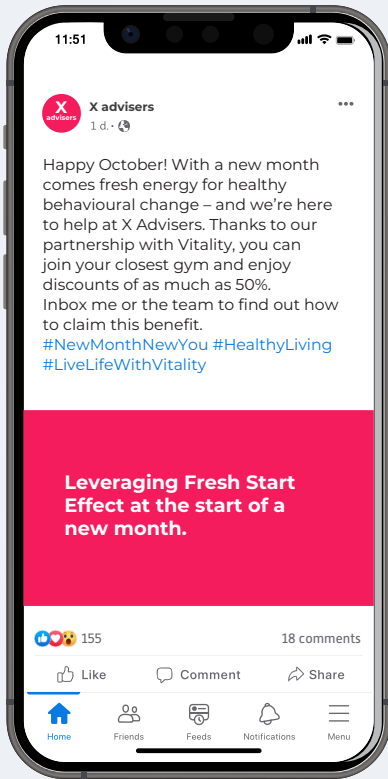
## So, where do you start?

It's easy to feel overwhelmed when starting out, so here are some simple first steps to get you started on your social media journey:

- 1 Define your goals**  
Decide what exactly you want to achieve – brand awareness, leads generation, client education, etc. The types of posts you do, and the frequency of these posts, will be guided by your overall goals.
- 2 Choose your platforms**  
Select social media platforms that best align with your goals, your target audience and the type of content you want to share. Platforms like Facebook are ideal for reaching a wider range of demographics, whereas Instagram and TikTok are primarily aimed at Gen Z and younger millennials. Start with the networks you feel most comfortable using – you can always add on as you go.
- 3 Set up your profiles**  
Complete your profiles with professional photos, clear descriptions and links to your other channels. This process is quick and easy, and can be done using your phone or laptop. If you don't already have a professional photo of yourself to use, now is also the time to consider a photoshoot or you can try an online AI tool to generate your headshot.
- 4 Create a content strategy**  
Include detailed outlines for your posts, including copy and visuals, as well as a posting schedule. Here, ask yourself: What type of content will you create and which platform is most suited to host this content? How much time can you dedicate to the platform? What channels are your competitors using?

## Ready to get started?

Here are some examples of social media posts to inspire you.



**The bottom line:** Social media can help to **humanise insurance and financial advice** – making you and your business more engaging, approachable and trustworthy.