



# MARKETING YOUR GENERAL INSURANCE *services*



# Hello,

Looking for help marketing your business? Look no further.

Whether you're new to the insurance game or have been doing it for years, marketing is always a good idea. You need to put your message out there and let people know what services you offer, otherwise – how will they know?

You're the best person to understand what your clients want, so consider what resonates most with your clients and create content that will encourage people react and respond.

Most people don't understand the benefits of insurance. It's something we're required to have in place for certain scenarios (such as purchasing a house with a mortgage), but aside from that, many people don't know much else about the industry or products on the market.

It's your responsibility to guide them through the process, highlight the important factors that are often missed or left out and be available to answer their questions.

We've put together some practical advice, tips and templates for you to use, to help publicise and promote the support you provide.

# Marketing principles

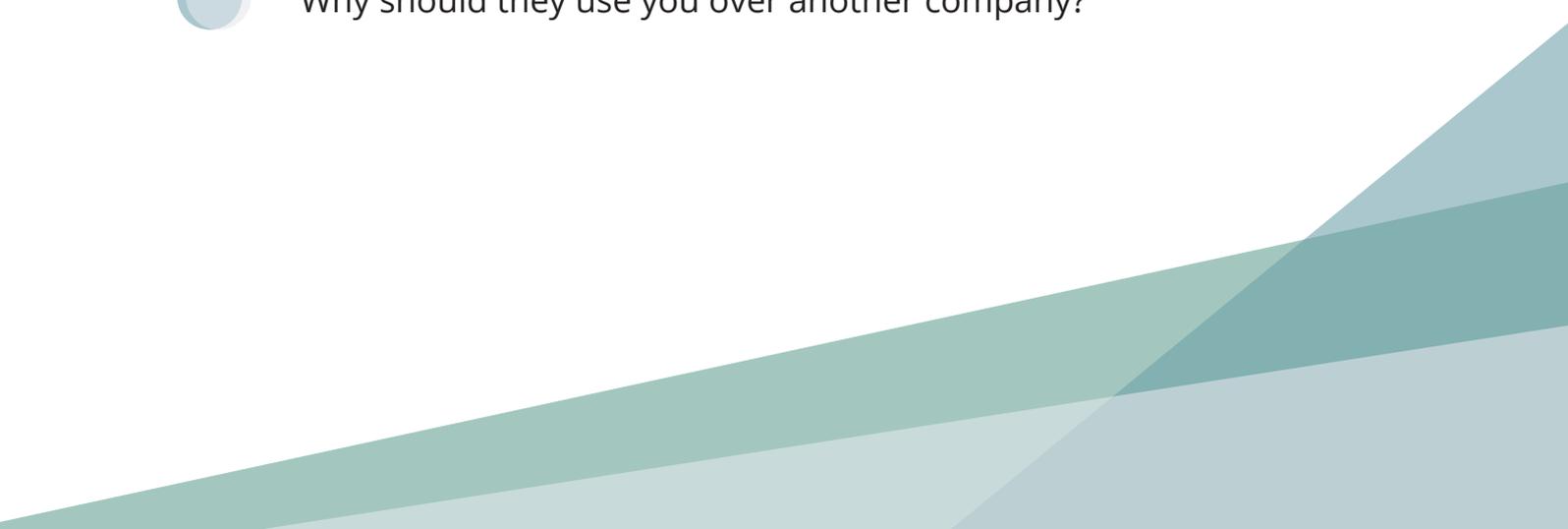
## What, where and when?

Creating content to share with your audience is very important, however, you should never just create or share for the sake of it. It's vital to consider what you want to say, when is the right time to say it, and where you're going to share it, to get the best reaction.

### What are you promoting?

The success of any marketing campaign comes down to getting your key message right. If you get this wrong, all of your other efforts will be in vain.

For starters, when deciding what to promote, consider what's important to your clients.

- What are they looking for?
  - What value do you and your business add to their lives?
  - When do they need you most?
  - Why should they use you over another company?
- 

When promoting GI, some key messages to return to every time could be.  
Do they have...

- Insurance for accidental damage?
- Peace of mind for their legal liability?
- Cover for their prized possessions – jewellery, gadgets, bikes?
- Protection for their homes in a disaster – fire, flood, subsidence?

## Where should you promote your message?

We all have our preferred ways of absorbing content, whether it be TV, radio, social media, etc. A key factor in promoting your message is determining where your audience are most likely to see it and interact with it.

Where will your customers (current and potential) see your message?



Your website



Your office



Social media



Email marketing



Direct marketing

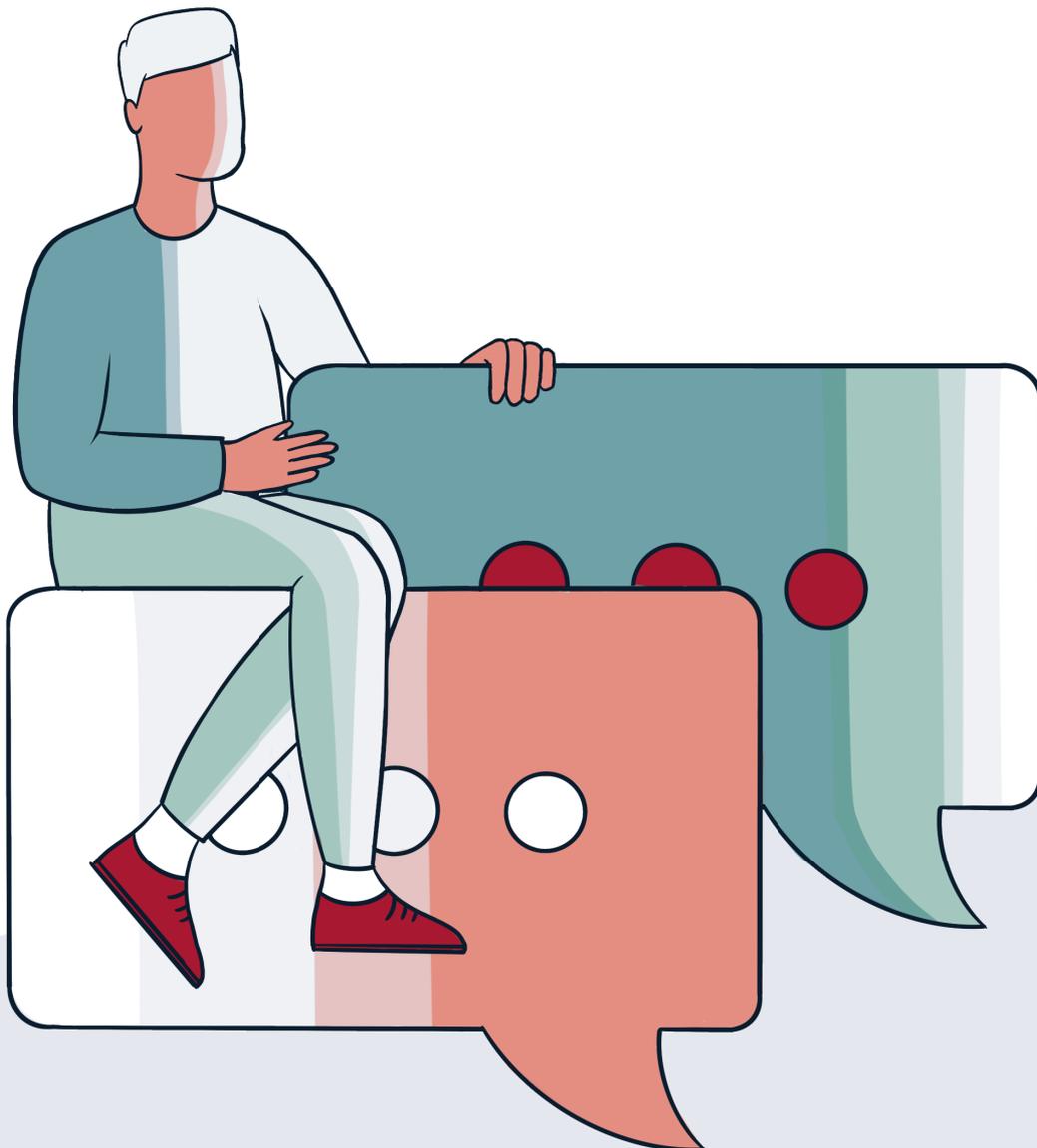


Google maps & directories

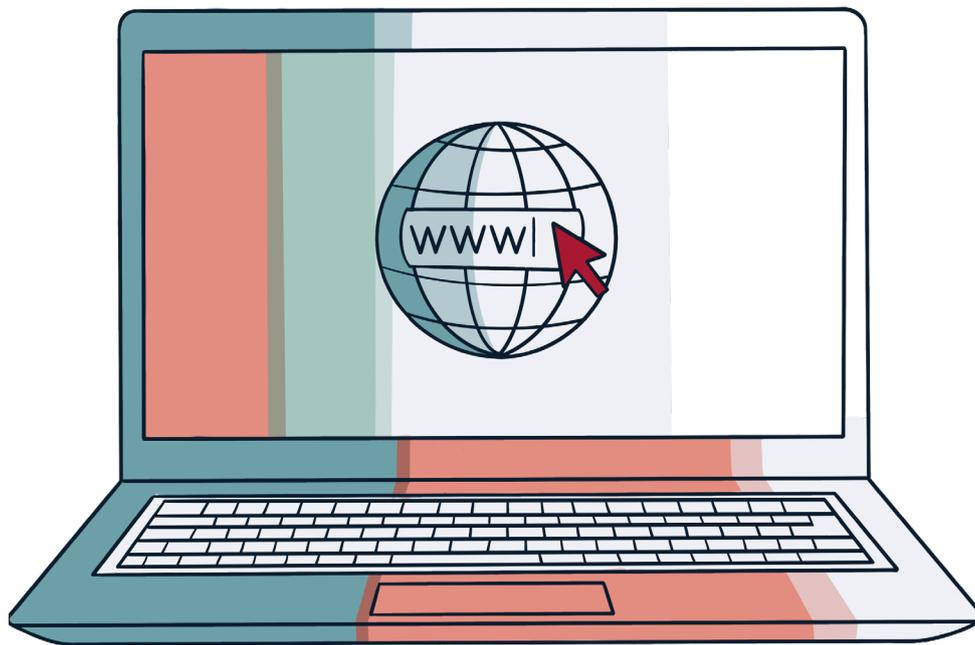
## When should you promote your message?

Just as important as the “where”, is the “when”? In fact, the two go hand in hand. You wouldn't send a text message to a client at 3am, as you'd probably wake them up and they're unlikely to be available to chat. Similarly, you wouldn't offer home insurance for a customer after they've purchased a new property, as they will have already sorted it elsewhere.

- When are they going to be most receptive to your service offering?
- When are your customers most likely to be available for a call or email exchange?



## Section Two



YOUR WEBSITE

# Your website

Your website is the main place that people will visit to verify your company, so it needs to be kept up to date and should be simple to navigate.

Your website is also a great place to publish any client testimonials you've received, as this helps your potential customers see what others think of you. Research has shown that "58% of adults don't trust a brand until they have seen 'real world proof' that they have kept their promises".

Use your website to share your company's story with your clients, to show them that you are a company they can trust. You should include an "About Us" page, which contains:

- Who you are.
- What you do.
- Your story and company values.
- What your customers think of you.
- How and when you can be contacted.

When your customers are visiting your website to check information on mortgages or investments, this is another opportunity to make them aware that you can also help them with their insurance needs.



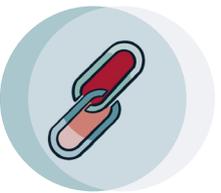
## Setup a specific landing page

Provide all of the main information that someone just starting out would need to know, and clearly detail how you can help.



## Include it in your main navigation

Make it easy for your customers to get to the information they need within your website by providing a fixed navigation menu with clear headings.



## Link to it from other pages like mortgages

We know that lenders require the property to be adequately protected, so it's a natural next step for your client.

## Don't have a website?

Here are some free online tools.



[Squarespace](#)



[Wordpress](#)



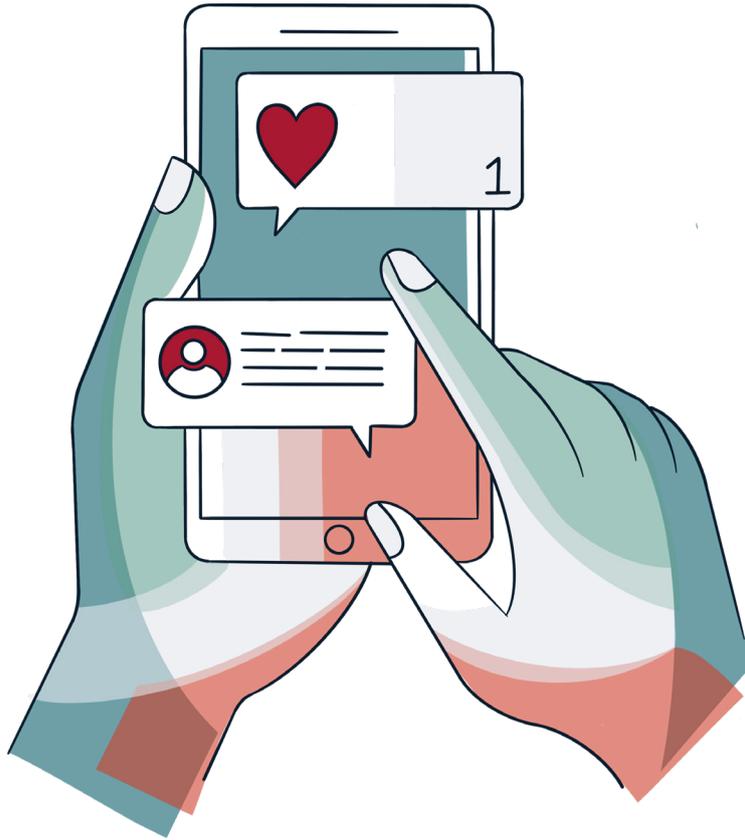
[Wix](#)



[Woobox](#)

Nearly 55% of web traffic is from a mobile device; therefore, when building or editing your website, you need to ensure it's suitable for mobile users too.

## Section Three



SOCIAL MEDIA

# Social media

When you think about marketing, social media is probably the first thing that comes to mind, and there's a reason for that.

Social media is one of the fastest ways to reach the largest amount of people. Due to the algorithms put in place by each of the channels, once someone interacts with your content, it is then shown to their followers and so on. But first, you need to gain followers, so it's important to highlight your presence on social media through other outlets, such as your website, emails and word of mouth.

## What you can share on social media?

Here are a few ideas of what you can share on social media



### Client testimonials

Has one of your customers said something lovely about your business? Share it for others to see your hard work!



### Relevant news stories

Has there been a change in legislation that may affect your clients? Let them know how you can help!



### Your products & services

Are you able to help someone protect their home and possessions? Shout about your service offering!



## A glimpse into your life

Have you been on holiday, or had a recent addition to the family? Help your clients get to know the face behind the business!



## Where can you share your content?

There are many social media platforms you can use to promote your business, you just need to decide who your target audience is and which they're most likely to use and interact with.

### Twitter

Maximum of 280 characters per tweet (this includes emojis, hashtags and web links, so be concise with your wording). You have the option to schedule your post for a later date or time – just click on the calendar icon at the bottom of the compose box.

There are specifications for the size and shape of your images and for the length of your videos. You can find more about this, here: <https://business.twitter.com/en/help/campaign-setup/creative-ad-specifications.html>

### Facebook

Maximum of 2,000 characters per post. There are specifications for uploading images and videos to your posts, which you can find here: <https://www.facebook.com/business/ads-guide/image>

### Instagram

Maximum of 2,200 characters per post. Image specification requirements can be found here: <https://help.instagram.com/1631821640426723>

## LinkedIn

Maximum of 1,300 characters per post – so you have plenty of space for your message.

You have the option to add content to your 'Life Page', such as your company history and achievements. This will help to instil trust in your organisation.

## TikTok

It's a bit of a wildcard, but have you considered using TikTok? There are several successful mortgage advisers and brokers on this app, helping clients understand their requirements and providing practical advice on how to obtain a mortgage.

It's important to think outside the box, in order to grab your audience's attention.

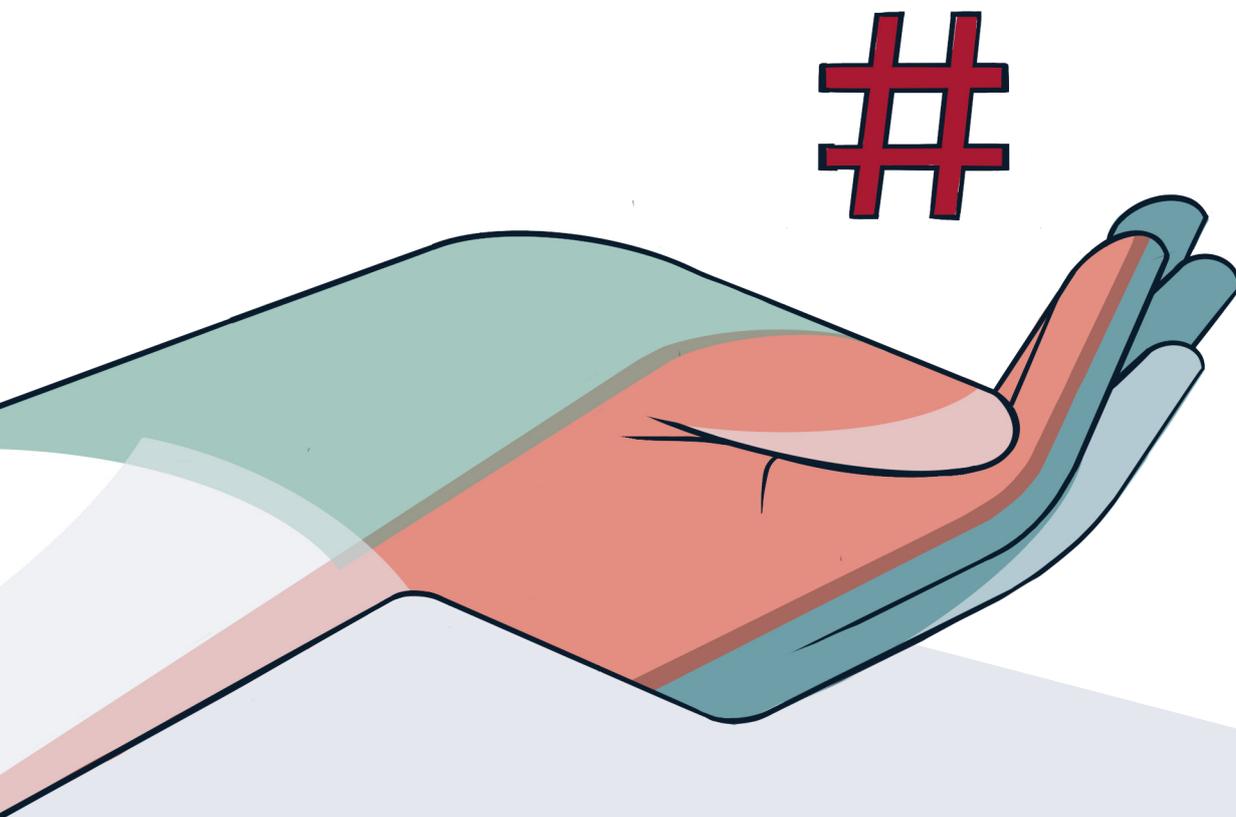
## What else?

When using images on social media, be careful to use either your own designs/images or photos found on an image hosting site (such as unsplash.com) to avoid any copyright issues.

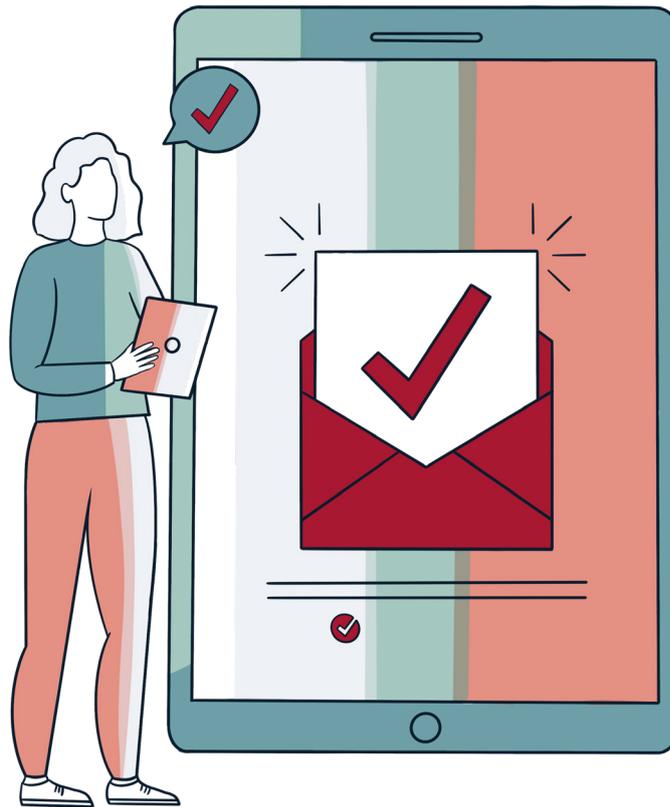
If using Twitter, head to "Insights", found within the Media Studio – this will tell you when your followers are online and viewing content, to help you determine the best time to post to gain the most engagement.

Within every social media platform, you can search for specific terms as hashtags (#) and find out which ones are the most popular, then use these within your posts. For example, we often use #InsuranceBroker as it relates to the content we post and has a large following.

Inject your own personality into all of your content. If you're known for being a joker, add your humour to your posts, it will help potential new audiences to see what you're like and may help to sway their decision to use your services.



## Section Four



# EMAIL MARKETING

# Email marketing

Email marketing allows you to provide a lot of information in one communication, unlike the character limits of social media and SMS. For example, you could promote the full range of services your company offers, include testimonials of previous clients, your contact details and availability, along with links to your social media pages.

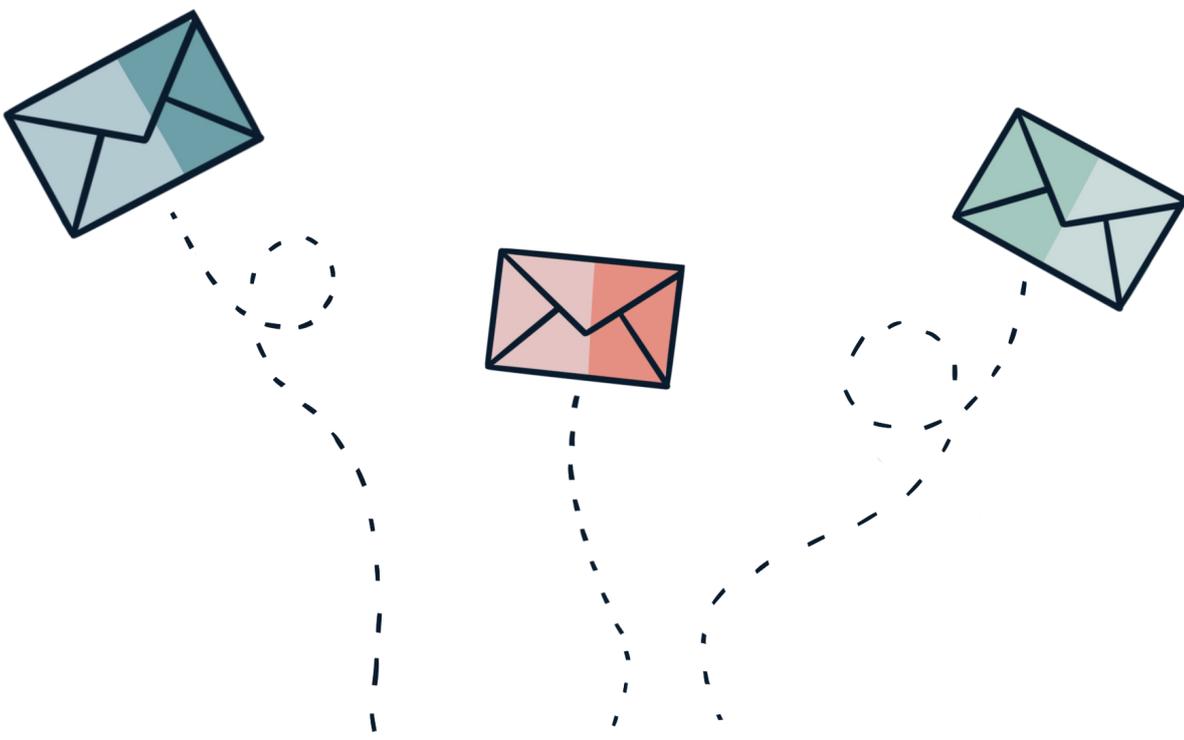
You can also encourage your audience to visit specific web pages and content through hyperlinks, when you do this, it's known as a CTA or Call-To-Action. It's important to use an enticing CTA, if you want people to follow these links in particular; popular examples are 'click here to find out more' and 'keep reading'.

Perhaps even more important, is the subject line. You want to encourage your audience to open and read your emails, if they don't, then what's the point of sending them?

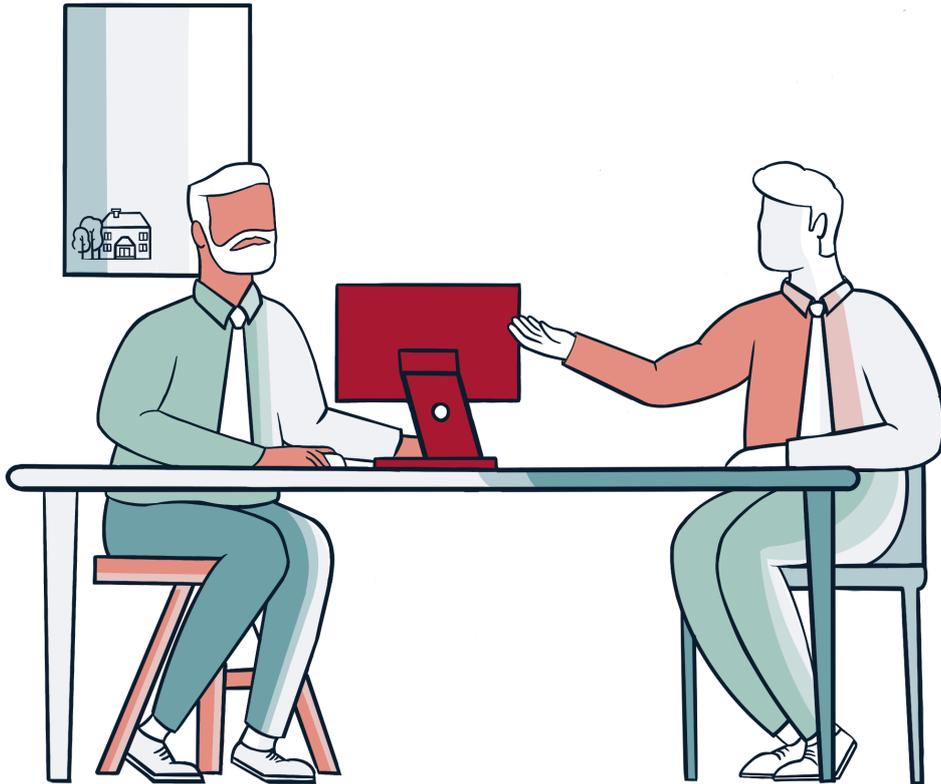
When using email, you can either email individual clients from your Outlook or Gmail account, or you can use an email messaging service such as [MailChimp](#) or [Campaign Monitor](#) . You will need to pay for these services, however, it will allow you to send multiple emails at once, at a specified time and will provide you with insights, such as how many people have opened your email, to determine if your content is actually being seen.

**Top tip:** If you decide to use an email messaging service, always send yourself a test email, before sending it out to your customers. That way, you can see what they'll see and easily spot any errors or areas that could be improved.

As part of the Data Protection Act, you will need to provide the option for people to unsubscribe from your marketing emails. People are less likely to unsubscribe if they feel they are getting something out of your content, so always ensure you are highlighting the benefit to them.



# Section Five



YOUR OFFICE

# Your office

Use of posters in key areas of your workspace can help to prompt clients to consider the additional services you offer and will help to place unconscious thoughts within their mind, when you mention them.

For example, if you have a poster near the entry way of your office, regarding home insurance, your client may see it and ask about it, or when you mention the topic, they will have already seen the message and be more open to hearing about it.

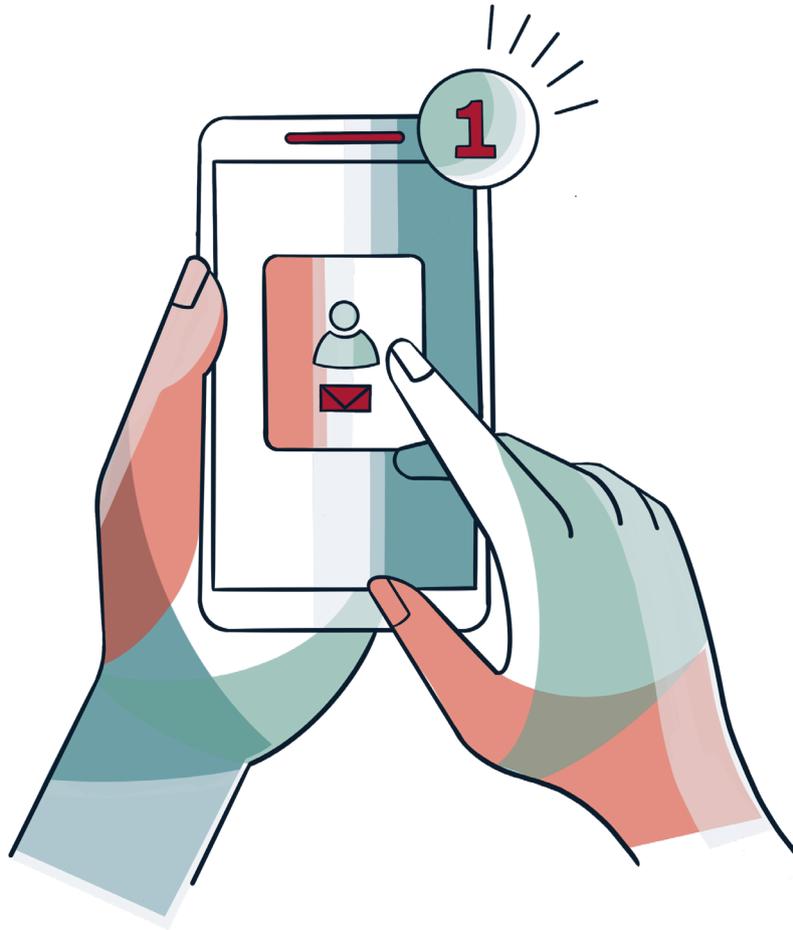
## Potential wording for posters

- Is your home covered for a fire or flood?
- Accidents happen – do you have protection?
- How much would it cost to rebuild your entire home?
- I can help you find the right home insurance policy.
- When was the last time you reviewed your home insurance?

## Templates

Download our poster templates [here](#), you can edit them to add your own logo and print to the size you require.

## Section Six



# DIRECT MARKETING

# Direct Marketing

The topics we've covered so far are great for general messages to promote your business. However, what about when you want to provide a targeted message to a specific customer or segment of customers?

This is known as direct marketing and there are a few options to consider.

## SMS

Text messages can be a great way to keep in contact with your existing clients, as they're more likely to receive the notification instantly, rather than via post or email. This could be useful as a reminder for an upcoming appointment, or to follow-up with clients after a specific event. For example, when you want to prompt them to review the quotes you've provided and decide which is best for them.

You could use a bank of templates to copy and paste into a message to send to clients individually, or might want to use a mass text messaging service such as [TextLocal](#) or [MailChimp](#).

With a mass text messaging service, you can create the message you want to send to multiple contacts and schedule for a specific time. Be aware that there may be character limit restrictions and some networks will automatically reject the SMS if they think it could be spam.

## Practical Examples

- Your home insurance renewal is coming up shortly and I just wanted to remind you that I'm here to help you find the best deal for next year.
- We have a meeting next week to discuss your mortgage application, during this time we'll also look at your home insurance requirements. Please bring along any paperwork for your current policy. I look forward to seeing you then!
- Thanks for your time last week. Have you had a chance to look through your home insurance options yet? If you have any questions or would like to go through anything in more detail, just give me a ring on...

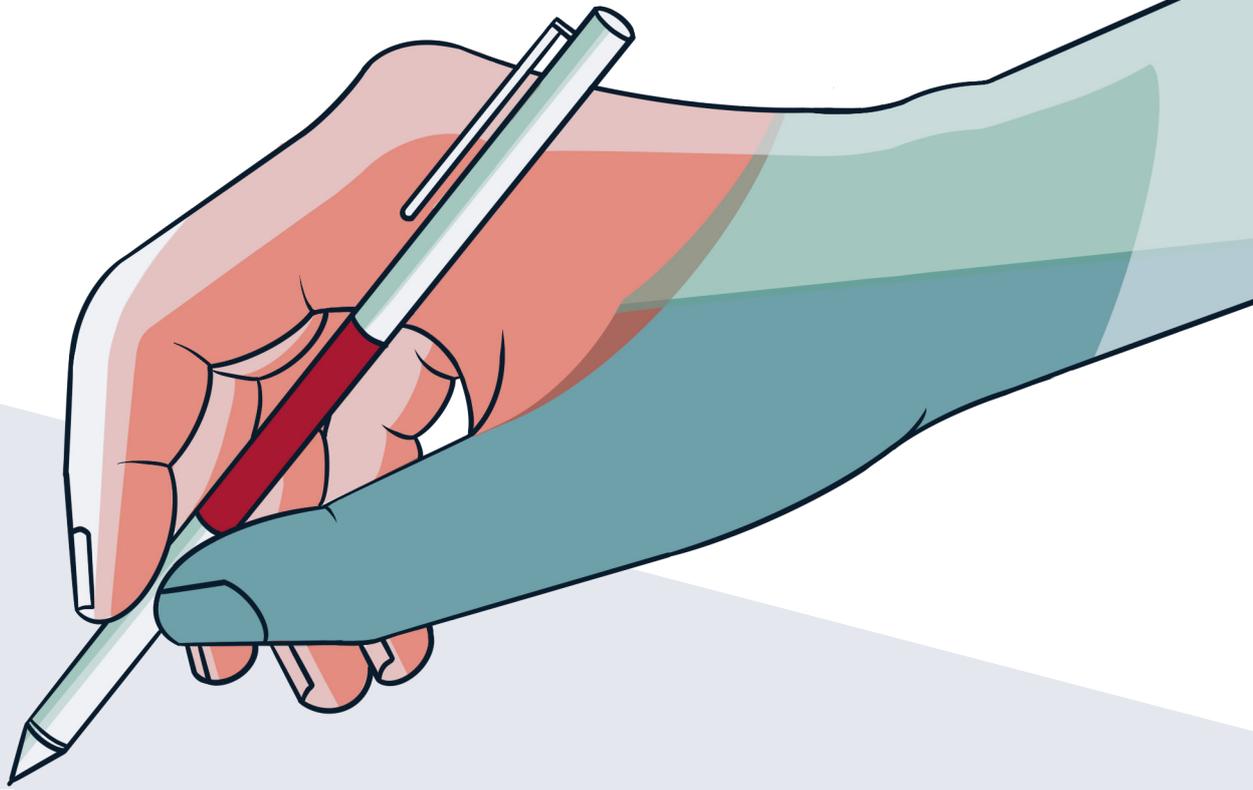
## Letters

As so much is done online nowadays, some people prefer to receive physical material, such as letters in the post.

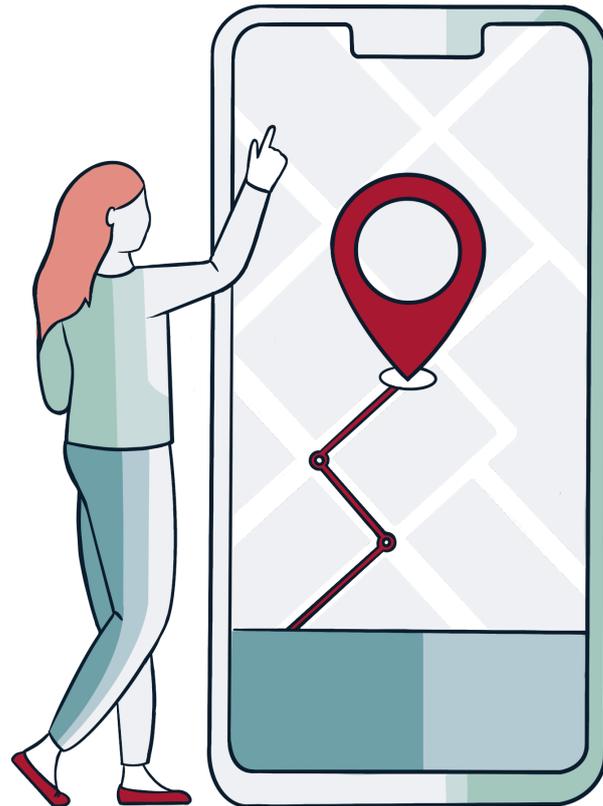
If you already have their details on file, it's likely that you'll have their address. People often change their phone number or use multiple email addresses, so these details may have changed, but if you've previously helped them to obtain a mortgage, chances are, their address is still the same, so a letter could be a good place to start when reaching out to a client you haven't spoken to in a while.

As with email, you can send tailored letters to specific customers, or you can use a template and just change a few details depending on what you want to promote.

**Top tip:** Have you just helped a customer secure a mortgage and protection? Consider sending letters to other people in their new street, to see if they want to review their home insurance policy.



## Section Seven



# MAPS & DIRECTORIES

# Google maps & directories

When people search for a broker, or your business in particular, where is the first place they'll go? Google, of course.

Research shows that 84% of the time, consumers end up on a company's page from a keyword search (e.g. "home insurance"), rather than via a direct search of the business name.

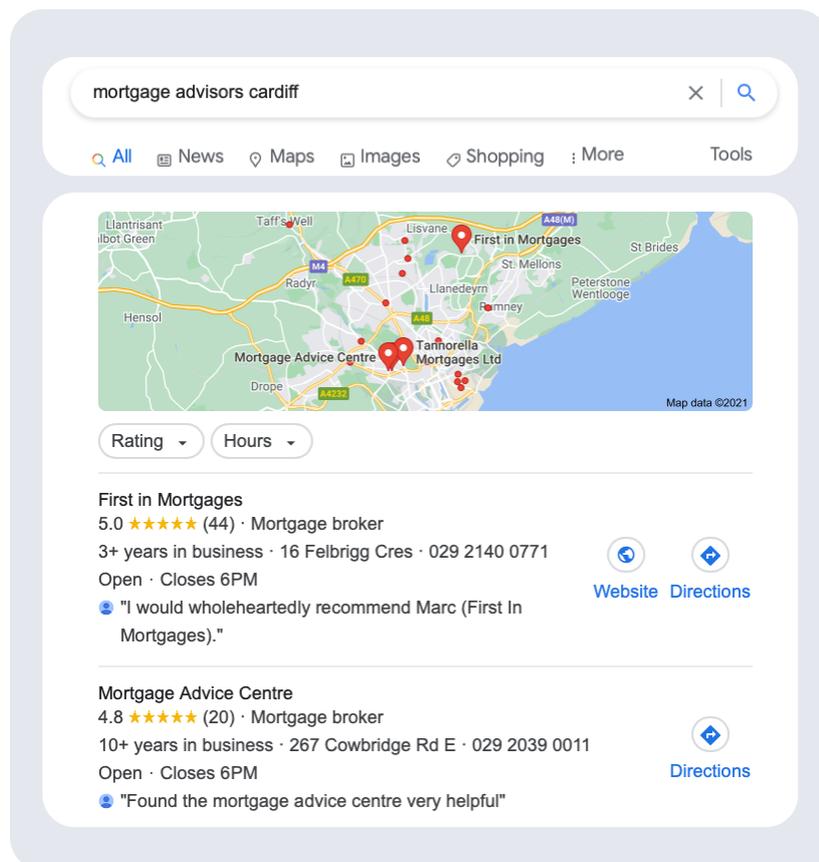
So you want to ensure your business appears near the top of the search, making it easy for people to find. One way to do this is to create a Google My Business account and complete your company information.

## Claim your business

86% of consumers use Google maps to look up a business. It's important to claim your business on Google, and keep the information up to date and accurate.

If you haven't done it already, [Wordstream has a great article](#) providing a step-by-step guide on how to set up a Google My Business account and create a Google Maps business listing.

Here is an example of how Google My Business works.



## Directories

Many businesses use directories as another way to help promote their services. Websites like [Unbiased](#), [Vouched For](#) and [Three Best Rated](#) can help to increase awareness of your company.

If you're looking to raise awareness of your business more locally, research whether there are any local newsletters or business publications that you can advertise in. You may need to pay for the advert, however, these are often free for readers, so are easily accessible and can reach a large number of people.

# The Source Marketing Hub

Need help with your marketing? Visit our new Marketing Hub.  
Hosting over 70 templates for your marketing campaigns, including:

- Design variations to suit your business branding.
- Choice of campaigns to align with your business focus.
- Completely free and unlimited usage of the templates.
- Editable sections where you can add your own contact details.

## Sneak peek of what's available

The image displays several marketing templates for home insurance, arranged in a grid. The top row features three variations of a 'HAVE YOU GOT THE RIGHT COVER?' template, each with a dark blue background and a white illustration of a row of houses. The middle row shows two variations of a 'DO YOU HAVE HOME INSURANCE?' template, featuring a white illustration of a washing machine and a basket of laundry on a wet floor. The bottom row shows two more variations of the 'DO YOU HAVE HOME INSURANCE?' template, with a dark blue background and a white illustration of a washing machine and a basket of laundry on a wet floor. An orange arrow points to a white box in the top right corner of the first template, with the text 'Add your logo' next to it. Another orange arrow points to a white box in the bottom left corner of the first template, with the text 'Personalise with your company contact details' next to it.

Have you got the right cover?

Get in touch today

Call: [ ]  
Email: [ ]

Do you have home insurance?

If not, talk to us today

Is your home protected?

Add your logo

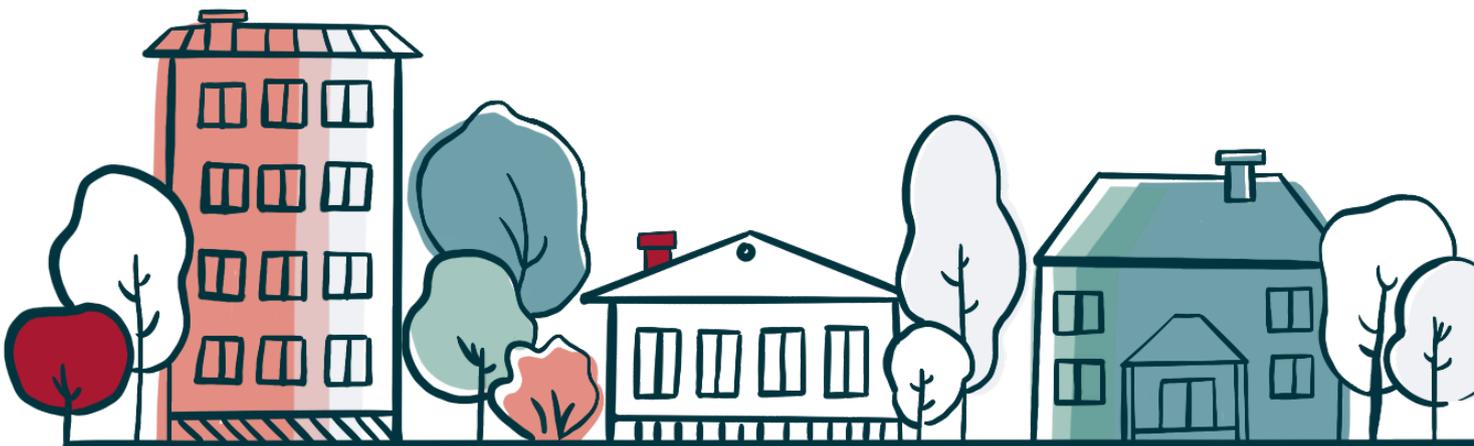
Personalise with your company contact details

# Contact us

Whilst we've created this document primarily to help you market your insurance services, it can all be adapted to promote other areas of your business too. Additionally, being active on social media and optimising your web presence will help raise awareness of your business in general.

If you have any questions about this document, or if you want further support, please get in touch.

- 02920 265 265
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- [www.thesource.co.uk](http://www.thesource.co.uk)
- @SourceInsurance





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