

A photograph of two young men sitting at a table, looking at a tablet together. The man on the right is wearing glasses and a blue shirt, and the man on the left is wearing a grey shirt. They are both smiling and appear to be in a collaborative work environment. A white coffee cup is on the table in the foreground.

# SOCIAL MEDIA UNIVERSITY: INSTAGRAM 101

STARTING YOUR INSTAGRAM-FOR-BUSINESS JOURNEY



TRANSAMERICA®



# TODAY'S PRESENTATION

After going through this course, you will know the basics of using Instagram for your business, and have the steps to create your own Instagram business page.

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# INTRODUCTION

Why use Instagram for your business?



# WHY SHOULD YOU CARE ABOUT INSTAGRAM?

Instagram is a social networking app meant to connect with friends and family, identify and interact with companies of all sizes, buy and sell goods/services, and much more. It's a platform where people are not only open to, but seek out brands and their offerings. This is a great platform to build relationships — especially with those aged 18-34.\*

\* <https://sproutsocial.com/insights/instagram-stats>





# 90%

of Instagram users  
follow a brand\*

# 70%

of shoppers look  
to Instagram  
for their  
next purchase\*

# 50%

of Instagram  
users visit a  
website after  
seeing it in Stories\*

\* <https://sproutsocial.com/insights/instagram-stats/>



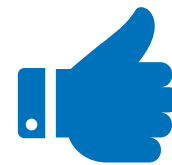
# THE JOURNEY TO USING INSTAGRAM FOR BUSINESS

Transamerica's Social Media University is designed around three major goals of using Instagram for your business. Each goal is a bit more advanced than the next:



## BE DISCOVERABLE AND AVAILABLE

Generate authority and become a searchable, verifiable business



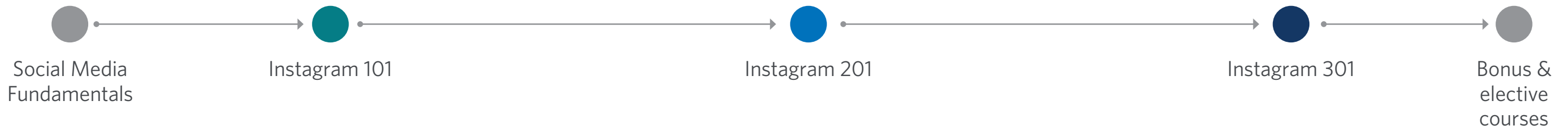
## BE A THOUGHT LEADER AND CREATE ADVOCATES

Post content to build strong relationships with existing clients



## GENERATE LEADS WITH ADVANCED FEATURES

Advertise to attract potential clients and recruits







# CHAPTER 1

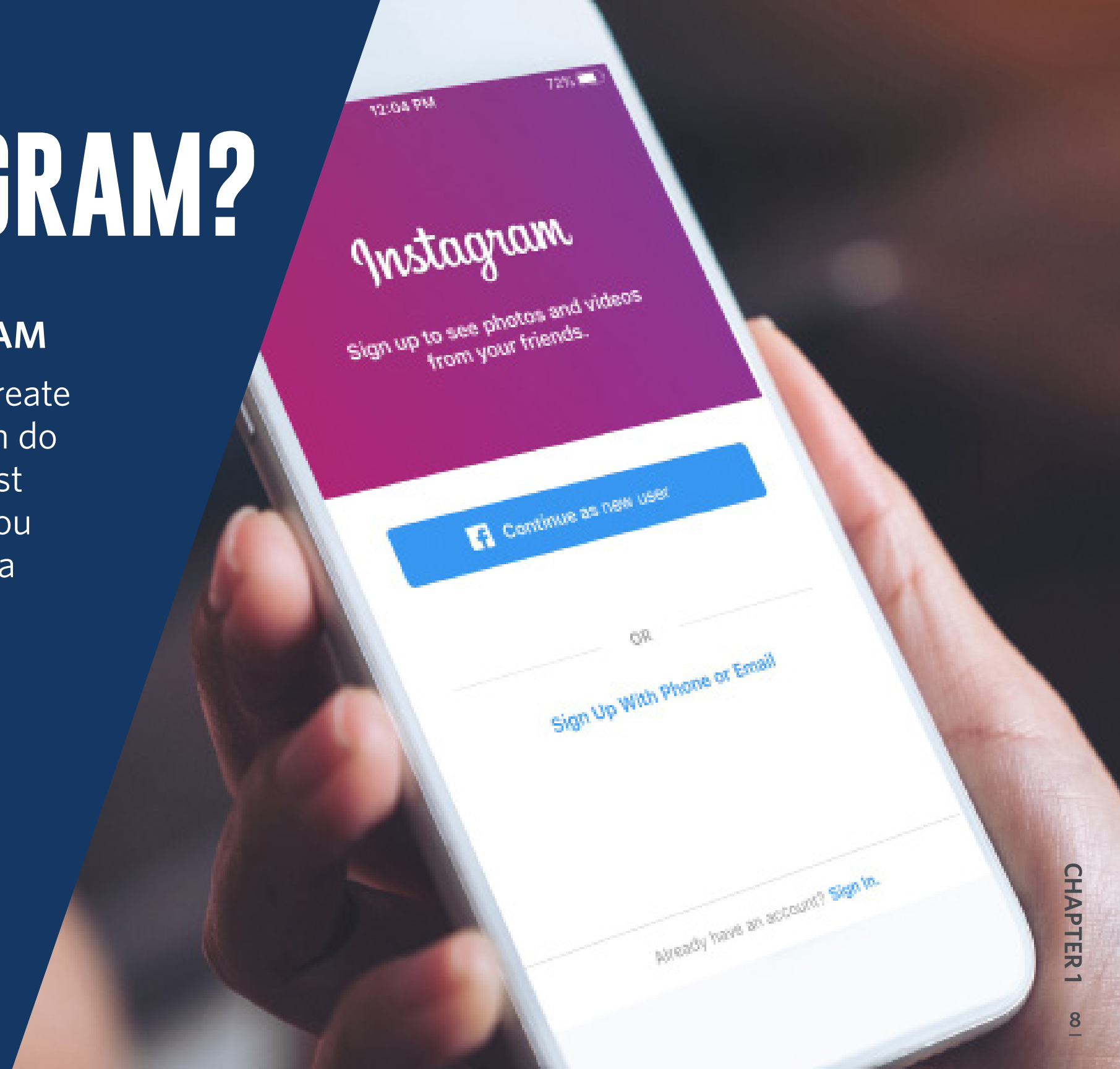
Introduction to Instagram



# WHAT IS INSTAGRAM?

## NAVIGATING THE WORLD OF INSTAGRAM

In order to be discoverable, you'll need to create an Instagram business page. Before you can do that, however, Instagram requires you to first create a personal page for your business. You will then transform that personal page into a business page.





# INSTAGRAM BASICS

## NAVIGATING THE INSTAGRAM HOMEPAGE

### **CREATE AN INSTAGRAM POST:**

If you click this button you can then select a photo(s) or video(s) to post onto your Instagram feed.

### **NEWS FEED:**

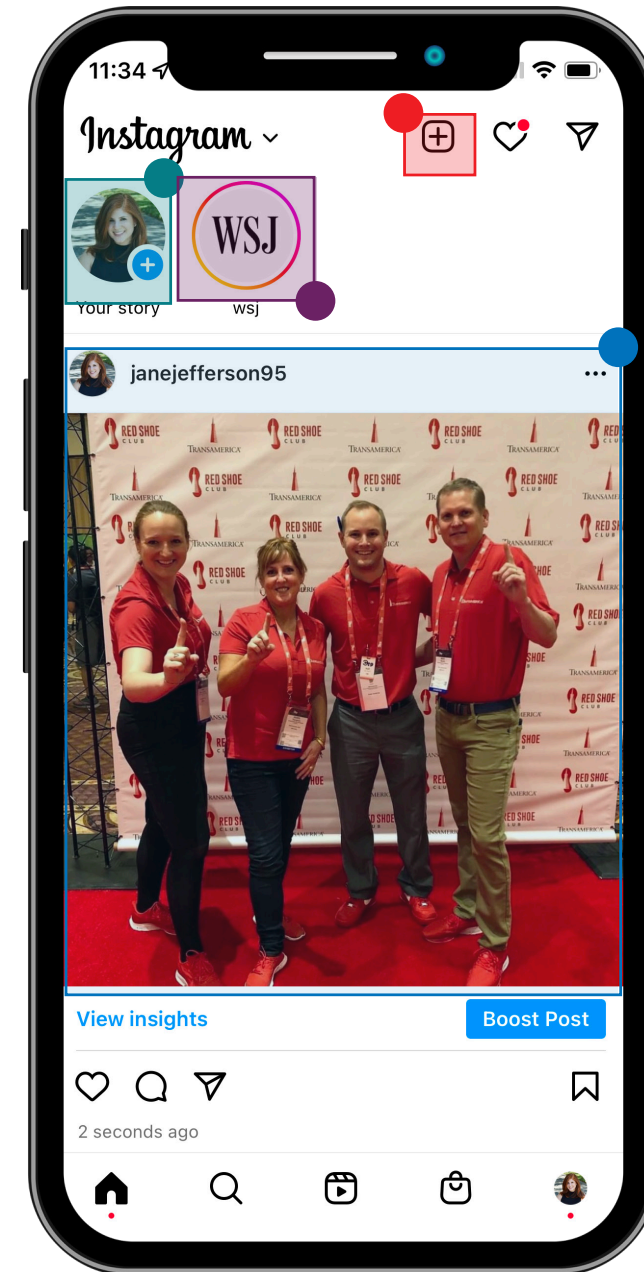
The default view displaying content from any individuals, brands, and interest-based pages you follow.

### **CREATE AN INSTAGRAM STORY:**

Here you can post photos, videos, polls, questions, and more to your story. Stories are posts that appear at the top of the Instagram app and disappear after 24 hours. Check with your legal council BEFORE using this functionality.

### **WATCH INSTAGRAM STORIES:**

When other Instagram users you follow create stories, they will appear here. Simply click to watch.





# INSTAGRAM BASICS

## NAVIGATING THE INSTAGRAM HOMEPAGE (CONT.)

### **YOUR PROFILE:**

Here you can view your Instagram profile.

### **SEARCH:**

Here you are able to search for people or hashtags that you would want to follow. Instagram automatically populates this area with content they believe you would like.

### **DIRECT MESSAGE:**

You can view and reply to your Direct Messages here. If you are mentioned in a story it will show here as well.

### **YOUR ENGAGEMENT:**

When a user likes or comments on your post, or begins to follow you, you'll receive a notification in this section.





# INSTAGRAM BASICS

## NAVIGATING A PIECE OF INSTAGRAM CONTENT

### 👉 PROFILE AUTHOR:

The profile picture and profile name appear at the top of each post.

### 👉 POST COPY:

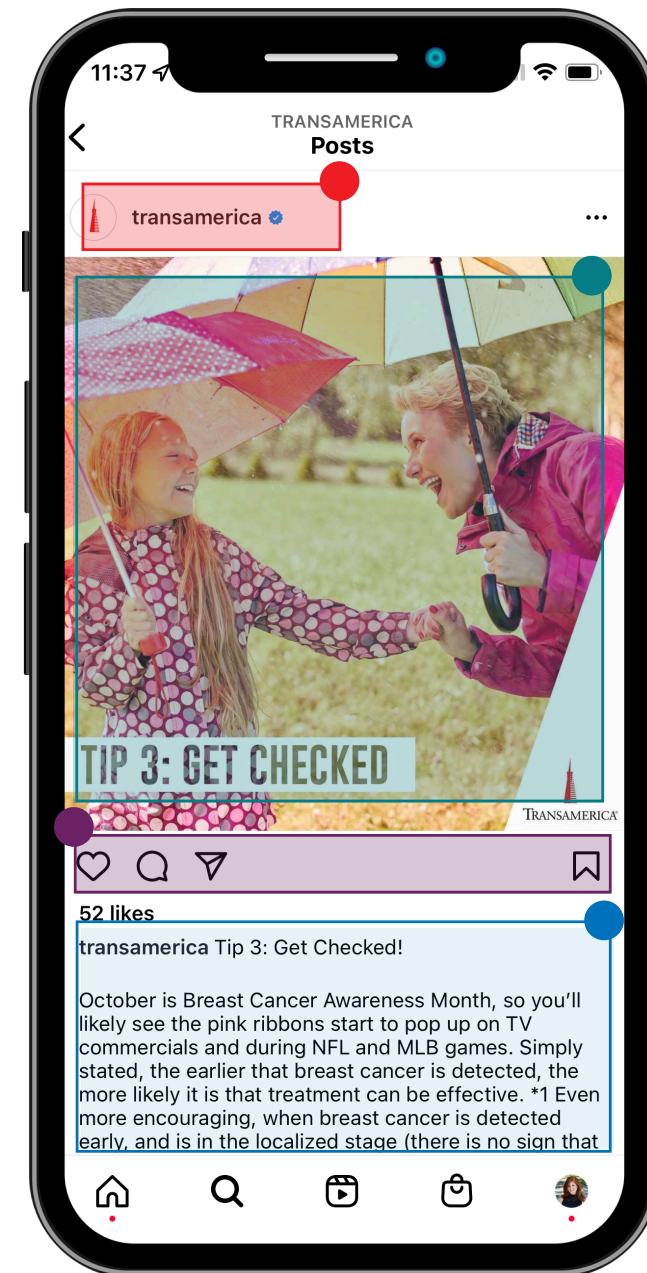
Text accompanying the visual. Along with each photo, video, etc. you are able to create a caption with the post.

### 👉 POST VISUAL:

Users can post a single photo, multiple photos, video, multiple videos, and more. For each post, you must have a visual to go along with the copy.

### 👉 REACTIONS, COMMENTS, AND SHARES:

When viewing pieces of content, users can react to them using the “Like” button, comment on the post, or share it through a direct message or on their story. Users can also like or reply to other users’ comments, creating a dialogue.





A young woman with long dark hair, wearing a yellow top, is laughing joyfully while holding a smartphone. An older woman with short dark hair, wearing glasses and a grey and white striped shirt, is leaning in and pointing at the screen of the phone. They are both smiling and appear to be enjoying the content on the phone. The background is dark with warm, out-of-focus lights, suggesting an evening setting.

# CHAPTER 2

Creating an Instagram business page





# INSTAGRAM FOR BUSINESS

## WHAT IS AN INSTAGRAM BUSINESS PAGE?

In addition to the typical individual account, Instagram users can choose to create an “Instagram Business Page.” These pages have multiple functionalities that individual pages do not, including the following:

- The ability to list out business details like contact information, website URLs, and more
- The ability to analyze account data and activity (Take our 201 course for more information)
- The ability to advertise (Take our 301 course for more information)

# CREATING A PERSONAL PAGE

The following slides provide step-by-step instructions for how to create an Instagram account. Begin by downloading the Instagram app:

## STEPS ON THIS PAGE

1. Go to your respective app store (iPhone App Store or Google Play Store) and download the Instagram app.
2. You will then sign up for an account with an email, phone number, or your Facebook account.



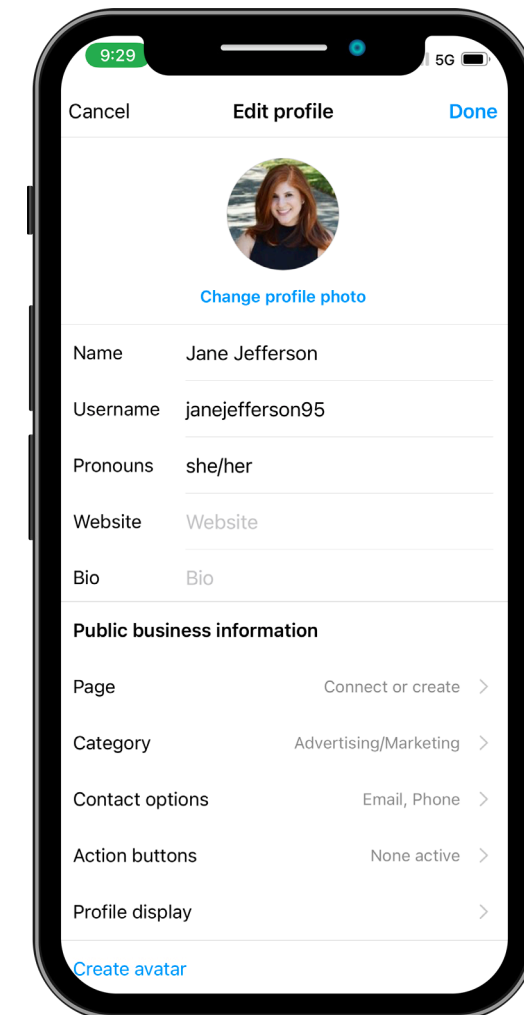


# CREATING A BUSINESS PAGE

The following slides provide step-by-step instructions for how to create an Instagram account. Begin by downloading the Instagram app:

## STEPS ON THIS PAGE

1. Complete your profile — starting with your account name. Try something unique like “Your Name – Your Org” (*John Smith – Transamerica Agency Network*).
2. Then select a page handle. Try to make it similar to your page name (*johnsmith\_tan*).
3. Fill out the rest of your info and complete your profile.

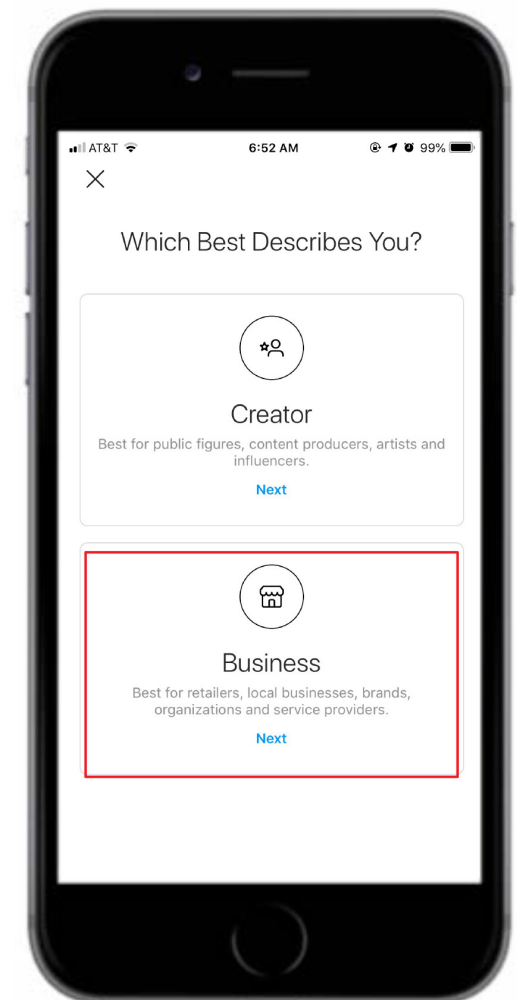
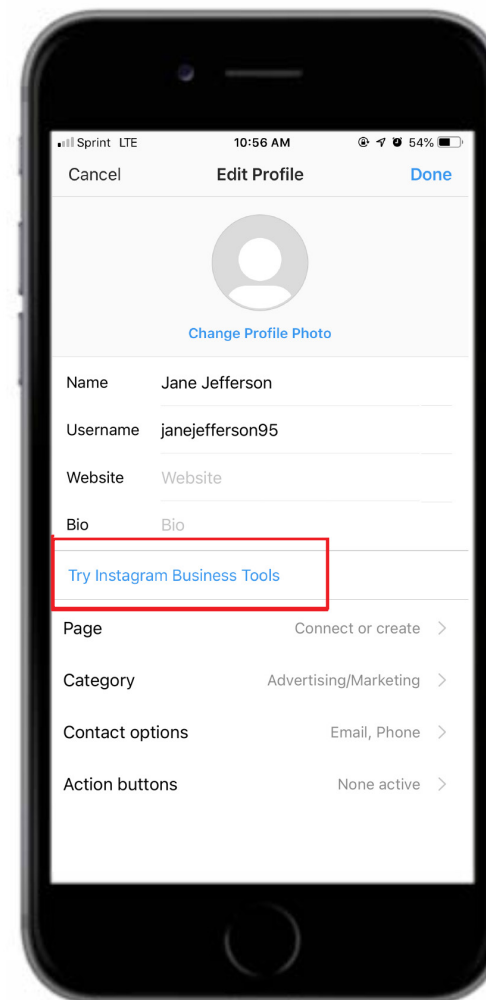


# CREATING A BUSINESS PAGE

By converting your personal page to a business page, you'll unlock some useful features:

## STEPS ON THIS PAGE

1. To convert your personal page to a business page, first go to "Edit Profile" and choose "Try Instagram Business Tools."

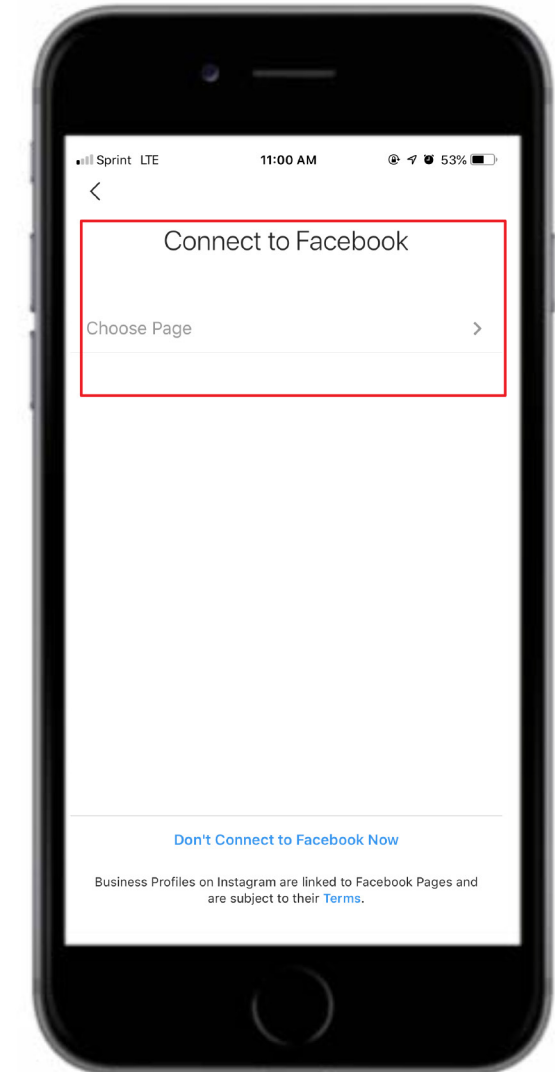
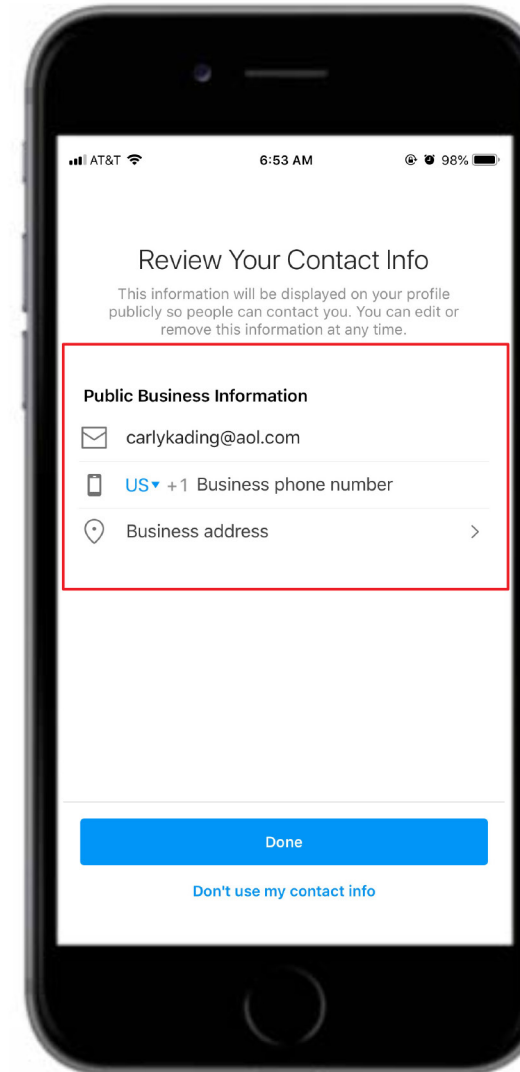
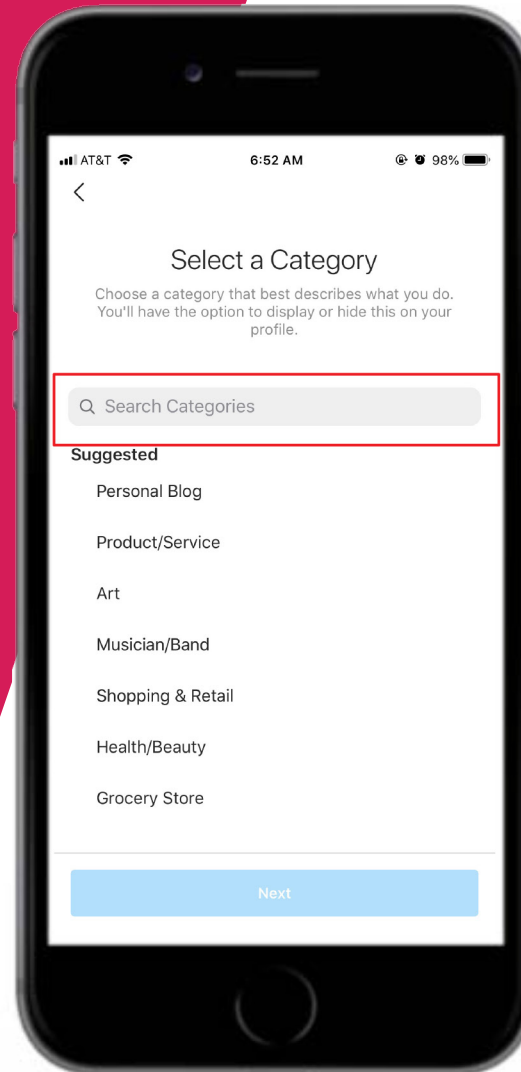




Next, complete your Instagram business page by following the steps:

## STEPS ON THIS PAGE

1. Choose the category that you want to be listed as (e.g., Local Business).
2. Fill out your contact information.
3. If you have a Facebook business page, connect your Instagram page to it.



# INSTAGRAM BASICS

## NAVIGATING AN INSTAGRAM PROFILE

### 👉 PROFILE PICTURE:

A photo chosen by the user to represent themselves across Instagram. You can edit this by clicking edit profile.

### 👉 IG HANDLE:

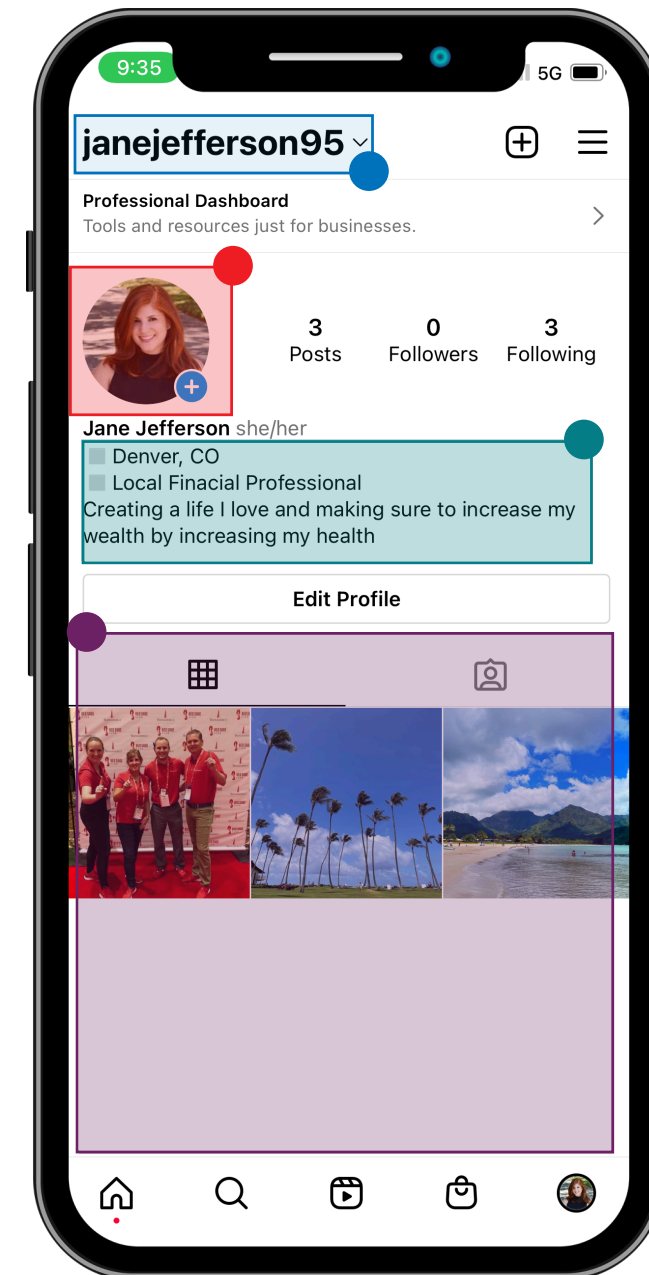
The handle chosen by the user to represent themselves across Instagram. It is also how users can find you on the platform.

### 👉 BIO:

Here you can create a personalized message for those viewing your profile. You can edit this by clicking edit profile.

### 👉 FEED & HIGHLIGHTS:

When a user publishes content, the post will appear in chronological order on their account. When a user posts to their story, they can save the post as a highlight on their page (more on that in Instagram 201).

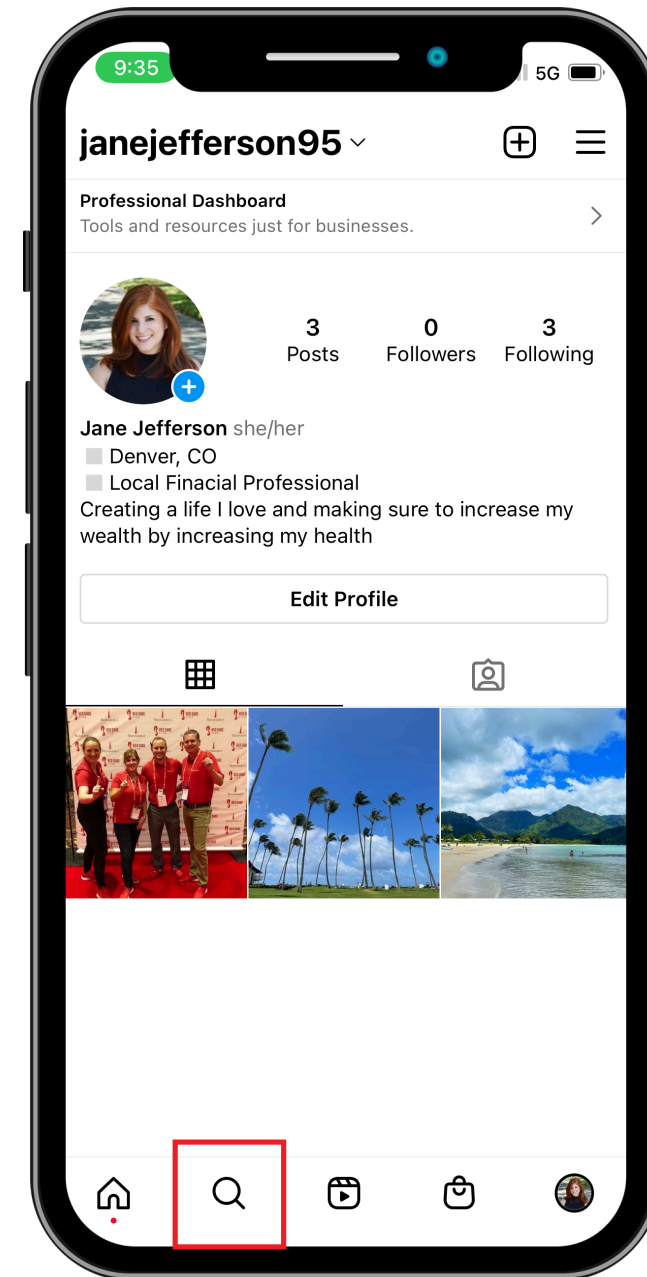




The next screen is your profile as it stands today. In order to complete your profile, we'll need to fill out a few more details:

## STEPS ON THIS PAGE

1. Now that you have a completed business page, you will want to find other people to follow. Click the search button to find people to follow. (e.g., Transamerica, transamericaagencynetwork, existing clients)
2. After that, you can start creating content. Our next section will take you through that process. Prior to doing that, **please have your account reviewed by your local legal council.**





# CHAPTER 3

Posting and engaging





# POSTING & ENGAGING

## POSTING AND SHARING ON INSTAGRAM

Once your profile is ready to use, you're ready to post content to your feed. When posting original content, you will always include a photo, video, or boomerang. We're going to take a look at how to do so.

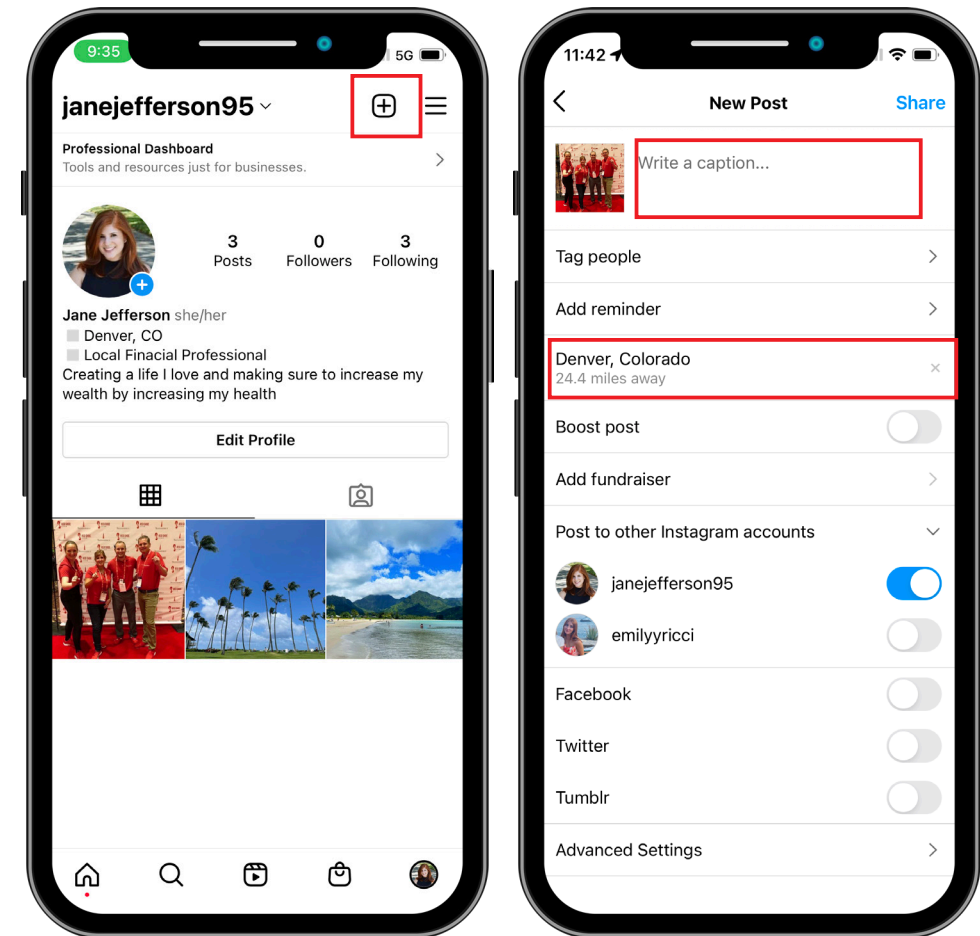
Additionally, once you start posting content, other users may comment on those posts. How to engage with these comments, and best practices around those engagements, will be covered at the end of this presentation.

# PUBLISHING ORIGINAL CONTENT

There are two ways to post on Instagram: creating a brand new post or sharing other people's content to your story.

## STEPS ON THIS PAGE

1. If you would like to create your own content, first create drafts and receive appropriate compliance approval.
2. Click on the "+" widget and then choose a photo to post.
3. Once you choose your photo, type the words you would like to accompany your photo in the "write a caption" section.
4. You can also choose a location or tag people in your post. Adding a location is a great way to get your content in front of people in that area. We recommend only tagging people if they appear in the photo.

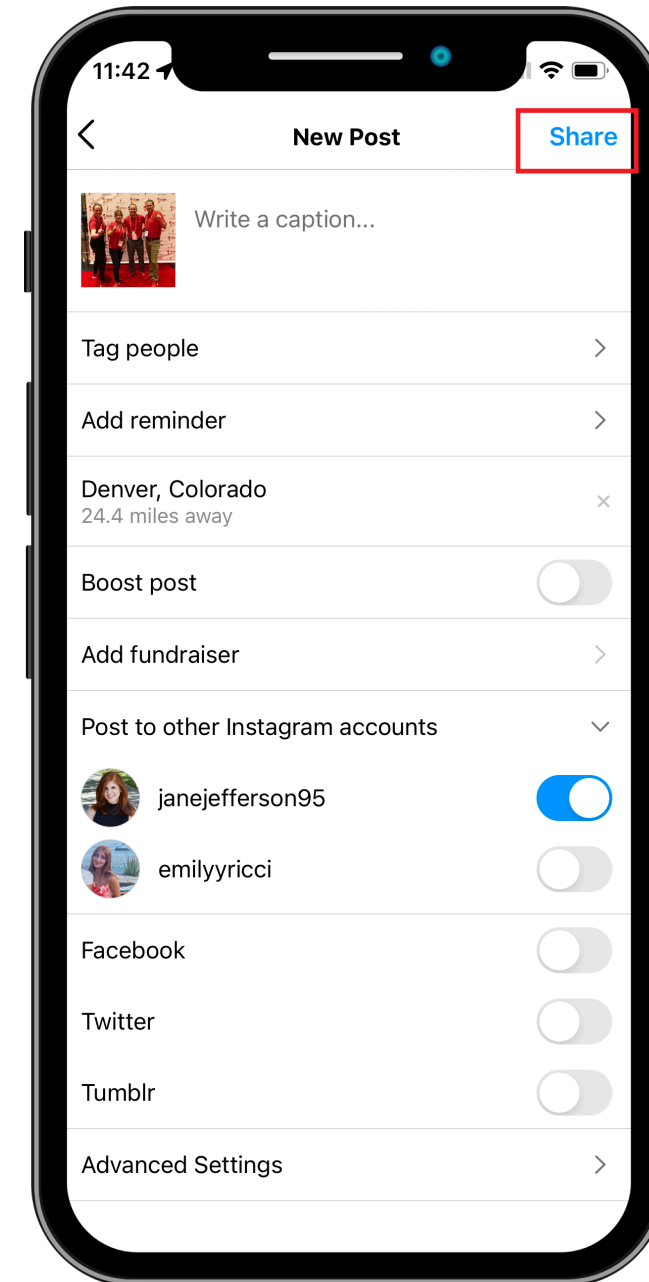




Now you're ready to post on your timeline. Make sure you post at least once a week to keep your profile up-to-date.

## STEPS ON THIS PAGE

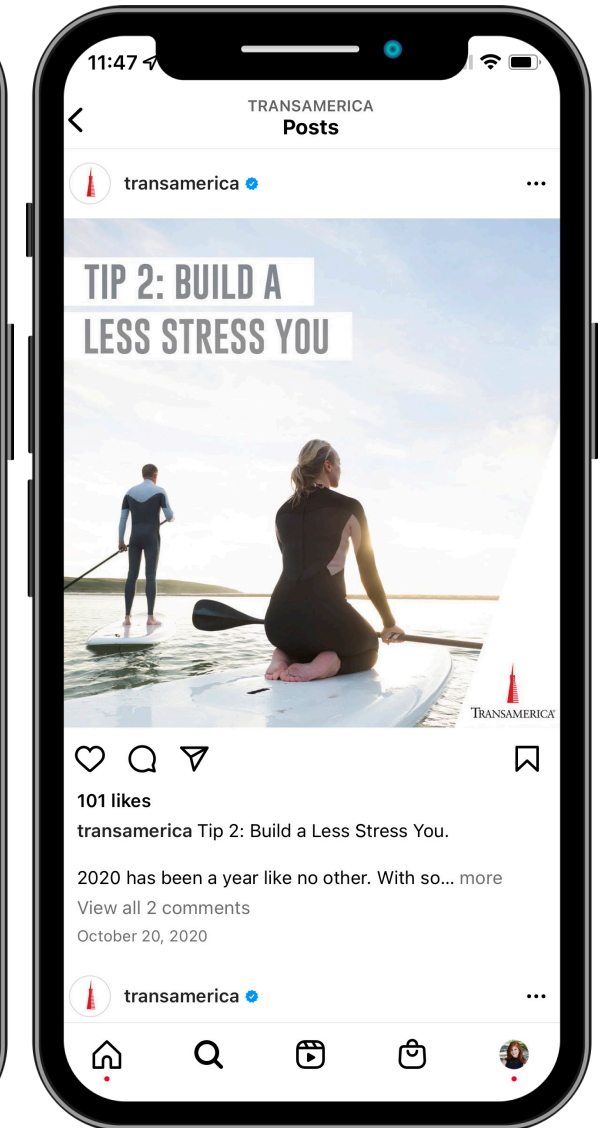
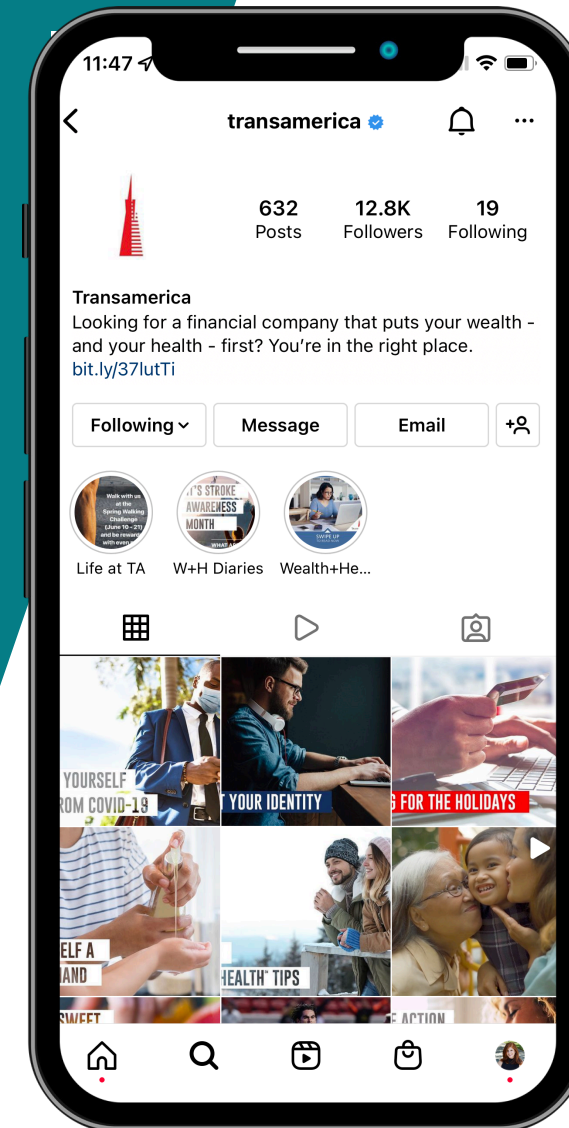
1. After creating copy, selecting your location, and then tagging individuals who are in the post, you will select "Share."
2. Your post will then automatically appear on your profile.



If you would like to share someone else's content, you'll need to share it to your story.

## STEPS ON THIS PAGE

1. First, go to the person's profile that has a piece of content you'd like to post.
2. Click the direct message button (looks like a paper airplane) and select "Add post to your story." Then click "Send To."
3. Finally, click the blue "Share" button next to "Your Story," and press "Done."
4. We recommend sharing content from Transamerica or the Transamerica Agency Network, but first check with your local legal council to ensure Transamerica-owned accounts are approved authors.





# ENGAGING & MESSAGING

## Engaging with and messaging other users on Instagram

Once you have a live profile, and begin actively posting, users may comment on your posts. Better yet, users may begin to message your account with questions. Either way, it's best to keep a few things in mind when responding to anyone on Instagram.







## HOW TO DEAL WITH COMMENTS

Comments can fall into three different buckets, and each bucket should be dealt with in different ways. As always, defer to your local legal council for best practices:

### 1. Question

If a user comments with a question, it's best to respond with an answer. If the answer requires personal information to be exchanged, ask that person to send you a private message. Or if that person is an existing client, pick up the phone and call them.

### 2. Comment - Positive

If a user comments with something positive, it's best to reply to them. This is a perfect way to begin to build that relationship. If you can't think of a response, "like" their comment.

### 3. Comment - Negative

If a user comments with a complaint or something else negative, it's even more important to respond. Express that you're sorry they feel that way and ask them to send you a private message in hopes of resolving the issue.





## HOW TO DEAL WITH MESSAGES

Messages allow you to discuss slightly more personal matters, as they are private discussions. That said, it's always best to move conversations to more secure channels like email or phone. When conversing in Instagram Messenger, keep the following things in mind:

- Be appropriate and respectful
- Use proper grammar
- Never promise anything
- Don't admit fault, but be empathetic
- Avoid abbreviations and limit emoji use to remain more professional (thx, lol, etc.)



# QUESTIONS?

A young man and woman are sitting at a desk, looking at a laptop screen. They are both smiling and appear to be in a collaborative work environment. The woman is on the left, wearing a black and white checkered shirt. The man is on the right, wearing a dark blue t-shirt. There is a green mug on the desk in front of them. The background is a bright, modern office space with wooden accents.

## YOU'RE NOW READY TO RUN AN INSTAGRAM BUSINESS PAGE

If you ever have any questions...

- Ask your manager for their advice
- Ask your respective compliance or legal officer
- Contact us at [socialmedia@transamerica.com](mailto:socialmedia@transamerica.com)



# THANK YOU

