

Social Media Guidebook



2026 EDITION

For NABIP state and local chapters

PREFACE



Social media remains one of the most immediate ways NABIP chapters can educate, advocate, connect with members and show the value of licensed benefits and insurance professionals.

The goal is not to be active everywhere. Choose the channels your chapter can maintain consistently, then use them to reinforce NABIP's voice, support advocacy priorities, strengthen member engagement and promote local programming.

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1. START WITH STRATEGY

Build a sustainable chapter presence before choosing tactics.



- **Define the goal.** Examples: promote an event, recruit members, increase advocacy participation, build media visibility, educate consumers or highlight member expertise.
- **Choose the audience.** Current members, prospective members, policymakers, regulators, reporters, employers, consumers or industry partners may need different messages.
- **Choose 2-3 priority channels.** A maintained presence on fewer platforms is more effective than inactive accounts across every network.
- **Assign ownership.** Name a primary administrator, backup administrator and content approver. Avoid single-person account ownership.
- **Use a content calendar.** Plan routine posts in advance and leave room for timely healthcare, legislative and chapter news.

A SIMPLE 2026 CONTENT MIX

40% education and industry context | 25% member and chapter stories | 20% events and professional development | 15% advocacy calls-to-action. Adjust based on chapter goals and analytics.

Recommended content pillars

- Advocacy & leadership: legislation, regulatory developments, Operation Shout, policymaker meetings and chapter leadership.
- Membership & growth: member value, volunteer opportunities, new-member welcomes and success stories.
- Professional excellence: webinars, courses, certifications, Compliance Corner, podcasts and expert commentary.
- Community connections: charitable work, partner activities, chapter milestones and local impact.
- Events & engagement: registration, speakers, live coverage, recaps and next-event promotion.

Cadence: consistency beats volume

Most chapters can succeed with 2-4 strong posts per week on LinkedIn, Facebook and Instagram, with more frequent posting on X during active advocacy periods or events. Use a cadence your volunteers can maintain for at least 90 days, then refine it based on performance.

Quick platform planning matrix

Use this matrix to decide where your chapter should invest its time. Start with the platforms that best match your audience and available volunteer capacity.

Platform	Best for NABIP chapters	Formats to prioritize	Suggested rhythm
LinkedIn	Professional credibility, policy context, member expertise, recruitment	Native posts, documents/carousels, short video, events, newsletters	2-4 quality posts/week
Facebook	Community reach, event promotion, member photos, local audiences	Photo albums, links, Reels, Stories, Events, Live	2-4 posts/week + event activity
Instagram	Visual storytelling, event energy, member spotlights, short-form education	Reels, carousels, Stories, photos	2-4 feed/Reels posts/week + Stories
X	Real-time advocacy, media engagement, policy news, conference/live updates	Short posts, threads, images, video, replies	3-7 posts/week; more during events
YouTube	Evergreen education, interviews, event recaps, reusable video library	Long-form video, Shorts, playlists	1-2 videos/month; Shorts as capacity allows

90-day starter checklist

- Confirm account ownership, admins and multi-factor authentication.
- Complete bios, logos, website links and contact information on every active channel.
- Build four weeks of evergreen posts before launch or relaunch.
- Review analytics at 30, 60 and 90 days and adjust the content mix.

2. NABIP VOICE, BRAND & GOVERNANCE

Speak with one voice while making the chapter feel local and human.



Brand voice

- **Professional, not stiff.** Write clearly and confidently. Use plain language whenever possible.
- **Issue-focused, not partisan.** Discuss policy, legislation and regulatory impact without attacking or praising a political party.
- **Useful before promotional.** Lead with what members, consumers or policymakers need to know; then provide the chapter or NABIP call-to-action.
- **Credible and current.** Share recent, reliable information and link to original or authoritative sources whenever possible.
- **Human.** Photos from chapter activity, member stories and first-person perspectives often outperform generic stock imagery.

NABIP SOCIAL HANDLES

X: @nabipsocial | Facebook: @nabipsocial | LinkedIn: @nabipsocial | Instagram: @nabipsocial | YouTube: @nabipnatl

Core hashtags

**#NABIP #AgentAdvocates #ShapingTheFutureOfHealthcare
#BrokersMakingADifference #CapCon2027 #NABIPAC2027**

Use campaign and event hashtags when NABIP publishes them. Keep hashtags readable and purposeful; more is not automatically better.

Governance basics

- Maintain at least two current administrators on every chapter account.
- Use role-based access through the platform whenever available instead of sharing passwords.
- Review administrators quarterly and immediately remove access when a volunteer or staff role changes.
- Keep a secure chapter record of account URLs, usernames, recovery email/phone, admin roles and ownership history.
- Use multi-factor authentication on every administrator account.

3. PLATFORM PLAYBOOKS

Use each channel for what it does best.



LinkedIn

LinkedIn is the strongest core channel for professional credibility, member expertise, industry commentary and recruitment. Organization Pages can publish posts, video, documents, events and other professional content. Complete Page information and maintain multiple admins so the chapter is easy to find and resilient to leadership changes.

- Prioritize member expertise, policy explainers, event takeaways and professional development.
- Use native documents/carousels for checklists, data points, legislative summaries and "3 things to know" content.
- Tag speakers, partner organizations and members when relevant and appropriate.
- Review Page content analytics for impressions, reach, clicks, reactions, comments, reposts and engagement rate.

Facebook

Facebook remains useful for local community reach, chapter events, photo albums and members who prefer a familiar social network. Use a Facebook Page for the chapter rather than a personal profile. Keep event details current, use an action button when useful and coordinate publishing through Meta's business tools when your chapter manages both Facebook and Instagram.

- Create Facebook Events for major meetings and share updates as the date approaches.
- Post people-centered event photos and short videos rather than only flyers.
- Use Reels and Stories to extend the life of speaker clips, member moments and behind-the-scenes content.
- Moderate comments consistently and move personal coverage questions to an appropriate private or secure channel.

Instagram

Instagram is a visual storytelling channel. It works especially well for conference energy, member spotlights, short educational video and chapter culture. Reels, carousels and Stories should do more than repeat a graphic from another platform; adapt the content to a mobile-first experience.

- Open Reels with the key point in the first few seconds and add on-screen captions.
- Use carousels to break complex topics into a simple sequence.
- Use Stories for same-day reminders, polls, quick clips and event updates.
- Write descriptive alt text when available and avoid placing essential information only inside an image.

X

X is best for fast-moving policy news, media engagement, real-time events and direct participation in public conversations. Standard posts support up to 280 characters; paid Premium features may allow longer posts, but concise writing remains a strong default. X currently recommends a 400 x 400 profile image and a 1500 x 500 header image.

- Use replies and quote posts to add useful context rather than simply rebroadcasting.
- Tag original news sources, policymakers and partner organizations when the mention adds value.
- Use threads for a multi-point legislative explanation, event recap or live update.
- During conferences or advocacy days, designate one person to post and another to verify names, titles, quotes and links.

YouTube

YouTube is a long-term content library for interviews, explainers, recorded programs, event recaps and short clips. YouTube Shorts can be square or vertical and may be up to three minutes long, making them useful for quick member interviews, "one thing to know" policy videos and speaker highlights.

- Organize content into playlists such as Advocacy, Member Education, Chapter Events and Member Stories.
- Add accurate titles, descriptions and captions so videos are searchable and accessible.
- Reuse strong video clips across LinkedIn, Facebook and Instagram, but check each platform's framing and caption placement.
- Use only music, photos and video you have rights to use.

OPTIONAL CHANNELS

Threads or TikTok may be appropriate for some chapters, but only if the chapter has a clear audience, responsible admin coverage and enough content capacity to post consistently. Do not add a channel simply because it is popular.

4. CONTENT THAT PERFORMS

Make every post easy to understand, easy to trust and easy to act on.



The 5-part post formula

1. **Hook.** Lead with the consequence, question or timely fact.
2. **Context.** Explain why the topic matters to the audience.
3. **Value.** Give the useful detail, insight or takeaway.
4. **Proof.** Link to NABIP, a government source, research or an original announcement when appropriate.
5. **Action.** Invite the reader to register, learn more, contact a legislator, comment, share or attend.

Visual and video best practices

- Design for mobile first. Use large text, simple layouts and strong contrast.
- Prefer authentic chapter/member photography over generic stock imagery.
- For video, use clear audio, good light, a stable vertical frame and captions.
- Keep one primary message per graphic or video. Complex content works better as a carousel or series.
- Check auto-generated link preview images before publishing; replace previews that are irrelevant, low-quality or off-brand.

Accessibility checklist

- Add alt text to meaningful images when the platform supports it.
- Caption every spoken video; review auto-captions for names, acronyms and insurance terminology.
- Use CamelCase for multiword hashtags (example: #ShapingTheFutureOfHealthcare) when readability is more important than matching a formal campaign tag.
- Do not communicate key dates, prices or calls-to-action only through an image. Repeat critical information in the post text.
- Avoid low-contrast color combinations and flashing or rapidly strobing video effects.

Link and source discipline

- Use primary sources for legislation and regulation when practical: Congress.gov, CMS, HHS, state agencies and official NABIP resources.
- Verify that linked articles are current and that the headline matches the claim in your post.
- If resurfacing older content, label it clearly (for example, #ICYMI) and explain why it is still relevant.

5. ADVOCACY & PUBLIC AFFAIRS

Social media can amplify advocacy when the message is accurate, coordinated and issue-focused.



- **Coordinate.** Use current NABIP talking points, campaign materials, Operation Shout language and event hashtags when provided.
- **Focus on policy.** Explain the impact of a bill, rule or market development rather than framing the issue around political party identity.
- **Verify before posting.** Confirm bill numbers, sponsor names, quotes, committee actions and regulatory deadlines.
- **Show advocacy in action.** Photos from legislator meetings, Capitol Conference and state advocacy days help members see the value of participation.
- **Thank thoughtfully.** Thank policymakers for specific actions or meetings without implying broader endorsement.

TOPICS TO AVOID

Overtly partisan attacks or praise; inflammatory political content; personal attacks; unverified claims; confidential member/client details; comments that could be read as individualized coverage advice; or content that conflicts with current NABIP policy positions.

Advocacy post checklist

- Is the issue aligned with current NABIP policy or chapter authority?
- Is the source reliable and current?
- Does the post explain the member/consumer impact?
- Is the tone professional and nonpartisan?
- Is there a clear action, such as Operation Shout, registration, or reading the policy update?

6. EVENTS & LIVE COVERAGE

Plan the story before, during and after the event.



Before the event

- Announce the date, location, registration deadline and member benefit.
- Introduce speakers with a short takeaway-focused bio.
- Share one reason to attend each week rather than repeating the same flyer.
- Provide the official hashtag and tag NABIP when appropriate.

During the event

- Post high-quality photos of speakers, attendees and chapter leaders; obtain permission when required.
- Share short, accurate takeaways and approved speaker quotes.
- Use Stories/Reels/Shorts for quick behind-the-scenes clips.
- Avoid posting confidential meeting materials, member data or private conversations.

After the event

- Thank attendees, speakers, sponsors and volunteers.
- Publish 3-5 key takeaways or a short recap video.
- Share the photo album and relevant presentation/resources if authorized.
- Promote the next chapter action while attention is still high.

7. COMMUNITY MANAGEMENT

Treat engagement as part of the content strategy, not an afterthought.



- Reply to reasonable questions and comments in a timely, professional way.
- Like or acknowledge members who share chapter content when appropriate.
- Correct factual errors calmly with a source; avoid prolonged arguments.
- Hide, remove or report spam, threats, harassment or content that violates platform/community rules.
- Do not debate private coverage cases in comments. Invite the person to use an appropriate direct channel without asking them to post personal or health information publicly.

RESPONSE TEMPLATE

Thanks for reaching out. Because coverage situations can involve personal information, please do not post plan, medical or identifying details here. Send us a direct message with a safe way to follow up, or contact the appropriate chapter/NABIP resource.

8. PAID PROMOTION

Use paid social selectively when the objective and audience are clear.



Paid promotion is most useful for event registration, membership recruitment, public education or amplifying a high-value piece of content. Platform interfaces and campaign objectives change frequently, so this guide focuses on durable planning principles rather than step-by-step ad screens.

1. **Objective.** Choose one measurable goal: registration, website visits, video views, leads or awareness.
2. **Audience.** Define geography, job role, industry, interests or retargeting criteria appropriate to the campaign.
3. **Creative.** Use a clear headline, one action and a mobile-friendly image or video.
4. **Budget.** Set a total budget, flight dates and a stop/adjust rule before launch.
5. **Measure.** Track cost per result and compare paid performance with organic benchmarks.

SPONSORED CONTENT DISCLOSURE

If a post includes a paid, gifted or other material relationship, make the disclosure easy to notice and understand. Do not bury disclosures in a long hashtag block or only on a profile/about page.

9. MEASUREMENT & REPORTING

Measure against chapter goals, not vanity metrics alone.



Goal	Useful metrics	Question to answer
Awareness	Reach, impressions, video views	Are more relevant people seeing chapter content?
Engagement	Reactions, comments, shares/reposts, saves, replies	Is the content useful enough to prompt interaction?
Traffic	Link clicks, click-through rate, landing-page sessions	Are posts moving people to NABIP/chapter resources?
Action	Registrations, Operation Shout actions, leads, inquiries	Did the audience complete the intended next step?
Growth	Follower growth and audience quality	Is the chapter building a relevant community over time?

Monthly review

- Identify the top five posts by engagement and by meaningful action.
- Note which topics, formats, speakers and posting times performed best.
- Stop or reduce low-performing formats that repeatedly miss the chapter goal.
- Record follower growth, website traffic and event/advocacy conversions when available.
- Share a short 3-bullet report with chapter leadership: what worked, what did not, what changes next month.

10. SECURITY, COMPLIANCE & RESPONSIBLE AI

Protect member trust as carefully as the chapter account itself.



Privacy and health information

- Never post client or member personal information, protected health information, policy numbers, claims details or screenshots that reveal private data.
- When using testimonials or case examples, obtain appropriate permission and remove unnecessary identifying details.
- Do not ask users to post sensitive information in comments or public replies.

Copyright, consent and sponsorships

- Use images, video, music and graphics the chapter owns, licenses or has permission to use.
- Obtain photo/video releases when appropriate, especially for featured testimonials or promotional content.
- Clearly disclose paid partnerships, sponsor relationships or material benefits when required.

Responsible use of AI

- AI may help brainstorm, summarize, resize, caption or draft content, but a human should review every public post before publication.
- Verify names, dates, statistics, legislation, quotations, citations and links independently.
- Do not paste confidential chapter, member, client or health information into unapproved AI tools.
- Check AI-generated images and text for bias, misleading details, fabricated logos, incorrect policy language and inaccessible design.
- Maintain NABIP voice: AI output should sound like the chapter, not like generic marketing copy.

PUBLISHING RULE

If you would not be comfortable seeing the post quoted in a news story, forwarded to a regulator or shown to a client, do not publish it.

11. SAMPLE POSTS & TEMPLATES

Adapt these examples to the chapter, event and current NABIP priorities.



LINKEDIN - POLICY EDUCATION

Healthcare policy can change quickly, but the impact is local. Our chapter is following [issue/rule] and what it could mean for employers, consumers and benefits professionals in [state/region]. Read NABIP's latest update: [link] #NABIP #AgentAdvocates

X - ADVOCACY

Licensed agents and brokers help consumers understand coverage choices, costs and tradeoffs. Learn why [specific policy issue] matters and take action: [link] #NABIP #AgentAdvocates

Tag the relevant NABIP account, source or policymaker when it adds context.

FACEBOOK - EVENT

Registration is open for [Chapter Event] on [date]. Join benefits and insurance professionals from across [region] for practical education, local connections and updates on the issues shaping our industry. Details + registration: [link]

INSTAGRAM - MEMBER SPOTLIGHT

Meet [Name], [role/company] and a proud member of [Chapter]. We asked: "What is one thing every client should know about working with a licensed benefits professional?" Swipe to read [Name]'s answer. #NABIP #AgentAdvocates

REEL/SHORT - 30-SECOND EXPLAINER

ON-SCREEN HOOK: "One thing to know about [topic] this week." SCRIPT: 1) What changed. 2) Why it matters. 3) Where to get accurate information. END CARD: chapter logo + nabip.org/chapter resource.

Reusable post prompts

- Three things members should know about [issue].
- What changed this week in [Medicare / ACA / employer benefits / compliance]?
- Member question of the month: [question] — answered by [member/expert].
- Behind the scenes at [event/advocacy day].
- Why I joined NABIP: a 20-second member video.

12. RECURRING CHECKLIST

A simple operating rhythm for chapter social media volunteers.



Weekly

- Review NABIP news, advocacy alerts, upcoming events and the chapter calendar.
- Schedule 2-4 evergreen/value posts and reserve space for timely news.
- Respond to comments, mentions and direct messages.
- Check links, dates, names, tags and graphics before publishing.
- Save high-performing posts or member photos for future reuse.

Monthly

- Review analytics and identify top topics/formats.
- Update the next 30-60 days of the content calendar.
- Confirm upcoming speaker, sponsor and partner tags.
- Review account admins, permissions and recovery information.

Quarterly

- Refresh profile/cover imagery if needed.
- Audit bio, website link, contact information and chapter description.
- Remove inactive administrators and confirm multi-factor authentication.
- Evaluate whether every active platform still has a clear purpose and adequate volunteer capacity.

13. RESOURCES & CONTACTS

Use current official resources for platform changes and NABIP messaging.



NABIP resources

[NABIP Media Guidebooks and Tools](#)

[NABIP Social Media Best Practices](#)

[NABIP website](#)

[NABIP LinkedIn](#)

[NABIP Facebook](#)

[NABIP X](#)

[NABIP YouTube](#)

External reference points used for this edition

[X Help Center - posting and profile image guidance](#)

[X Help Center - profile photo/header sizes](#)

[Facebook Help Center - Create a Page](#)

[LinkedIn Help - Create a LinkedIn Page best practices](#)

[LinkedIn Help - Content analytics for Pages](#)

[YouTube Help - Upload YouTube Shorts](#)

[FTC - Endorsements, Influencers, and Reviews](#)

[HHS - HIPAA Guidance Materials](#)

PLATFORM NOTE

Social networks change features, names, dimensions, ad options and analytics frequently. This guide was updated for 2026 and emphasizes durable practices; check the platform help center before relying on a specific interface or paid-ad setting.

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