

using social media to maximize engagement with your accountholders

“81% of financial advisors say they’ve gained new business through social media, with an average of \$1.9 million in assets gained through these efforts.”¹

Social media isn’t just a marketing tool – it’s where your accountholders live, share, and engage. For community and regional banks, it’s an opportunity to build authentic connections, boost brand visibility, and stay top of mind in a fast-paced world. Whether you’re new to the game or looking to refresh your strategy, the key to success lies in knowing how to meet your audience where they are.

This guide will walk you through practical tips to engage your accountholders confidently and consistently across social media platforms.

choosing the right social platform

Regardless of if you’re already active on social media or just starting out, it’s essential to reassess the platforms you’re using to ensure they align with your goals and audience. Here are a few considerations:

- **Purpose:** What’s your goal? Are you focused on enhancing brand awareness, increasing engagement, or sharing important news?



- **Audience:** Which platforms do your accountholders use? For example, LinkedIn is great for professional content, while platforms like Instagram and TikTok cater to younger audiences.
- **Content type:** Tailor your content to the strengths of each platform. LinkedIn is ideal for B2B content, Facebook works well for community stories, and Instagram thrives on visual storytelling.

Here are some statistics on social media demographics from Sprout Social to help guide your platform choices:²

- **18 – 29 years:** Snapchat (41%), TikTok (35%), Instagram (32%)
- **30 – 39 years:** LinkedIn (34%), X (34%)
- **40 – 49 years:** Facebook (22%), LinkedIn (25%)
- **50 – 59 years:** Facebook (29%), LinkedIn (24%)

consistency in branding

Building trust with accountholders requires consistency in your brand's look and feel across all social media platforms. Consider the following tips:

- **Contact information:** Make sure your phone number, email, and location are easily accessible on all platforms.
- **Visual identity:** Use consistent colors, fonts, and imagery to build recognition.
- **Messaging:** Maintain a consistent voice that reflects your institution's values, whether formal or casual.
- **Typography and imagery:** Choose fonts that are easy to read and images that reflect your community and brand values.

creating a social media calendar

Having a social media calendar helps you stay organized, save time, and maintain consistency. By planning ahead, you can ensure a steady stream of content without scrambling for ideas.



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HootSuite

- **Timing:** Use platform-specific recommendations to determine when to post. For example, LinkedIn suggests posting between 10 a.m. and noon on Tuesdays and Wednesdays, while HubSpot recommends posting on Instagram between 9 p.m. and 12 a.m. on Sundays for financial services.
- **Frequency:** Aim for two to three posts per week to maintain engagement.
- **Content ideas:** Here are 10 content types to help fill your calendar:
 - » Financial health tips
 - » Product updates
 - » Industry news
 - » Budgeting and saving advice
 - » Event announcements
 - » Community involvement
 - » Bank closures
 - » Security and compliance tips
 - » FAQs and interesting facts about your institution
 - » Employee milestones and team introductions



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growing your social media presence

To effectively grow your social media following, consistency is key, but engagement is just as important. Here are a few strategies to help you expand your reach:

- **Engage with comments:** Responding to comments boosts engagement and visibility.
- **Partner with local businesses:** Collaborating with local businesses can expand your audience.
- **Join trends:** Stay relevant by participating in trends that align with your brand's voice.
- **Leverage analytics:** Use analytics tools to understand what content resonates most with your audience and optimize accordingly.

- **Host giveaways:** Consider running giveaways in collaboration with local businesses to increase engagement, but be sure to check compliance guidelines with your legal team.
- **Hashtags:** Create unique hashtags to increase visibility and engagement.

the importance of social media for community and regional banks and credit unions

Social media is a powerful tool for financial institutions to connect with accountholders and build stronger relationships.

By choosing the right platforms, maintaining a consistent brand, and regularly engaging with your audience, your financial institution can unlock the full potential of social media.

At Jack Henry®, we're here to support your efforts with downloadable social media content and resources to help you stay on track.

You can also pair this article with our guide on [creating engaging social media content](#) to cover both strategy and day-to-day execution.

make the most of your solutions

Visit the [Marketing Center](#) to find free social media marketing materials to increase adoption.

For more information about Jack Henry, visit jackhenry.com.



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sources

1. Christina Newberry. *Social Media in Financial Services: Tips, Stats, and Examples*, Hootsuite, accessed September 19, 2024.
2. Jacqueline Zote. *Social Media Demographics to Inform your 2024 Strategy*, Sprout Social, accessed September 19, 2024.