



✓ Digital Marketing Checklist for Insurance Companies

- **Build trust**
- **Get qualified leads**
- **Grow with confidence.**

Whether you run a brokerage, an MGA, or a specialist insurer, your digital presence shapes who picks up the phone. Buyers compare providers online before any conversation begins.

Aggregators dominate the broadest searches. FCA rules apply to every piece of copy. And renewal cycles mean the window to win new clients is shorter than it looks.

This checklist is designed to help brokers, MGAs, and insurers tighten their digital marketing, improving visibility, attracting qualified enquiries, and staying compliant throughout.

Use it to

- ✓ Spot gaps in your current insurance marketing strategy
- ✓ Improve credibility, compliance, and lead generation
- ✓ Build a strong online presence that generates enquiries and supports long-term growth



1. Your Website

Built for how insurance buyers research, compare, and enquire.

Is your website fast, mobile-friendly, and easy to navigate, including on product and cover pages?

Do you clearly present each product line, specialist cover, and the types of clients you serve?

Is there a clear path to enquiry, a quote request form, a callback option, or a direct phone number?

Are trust signals visible, FCA authorisation number, accreditations, client testimonials, and case studies?

Is your website built with FCA guidelines and GDPR data privacy requirements in mind?

Are your key pages free from vague or potentially misleading claims that could create compliance risk?

A specialist insurance marketing agency builds websites that convert visitors into enquiries, without cutting corners on compliance.

2. SEO for Insurance Brokers & MGAs

Be visible when buyers search for the cover they need.

- Are you targeting high-intent keywords (e.g., "professional indemnity insurance for contractors" or "commercial combined insurance broker")?
- Do you have dedicated pages for each product line, specialist sector, and location you serve?
- Are your title tags, meta descriptions, and headings written around buyer search intent, not just keywords?
- Is your content written to demonstrate expertise, authority, and trust in line with E-E-A-T principles?
- Are you publishing content that answers real buying questions, such as FAQs, cover guides, product explainers, and comparison articles?
- Is your technical SEO in order, such as crawlability, page speed, schema markup, and mobile performance?

A specialist insurance SEO agency ensures your site ranks for the searches most likely to generate qualified enquiries, not just traffic.

3. Local SEO & Google Business Profile

Win visibility at the branch, town, and regional level.

- Have you claimed and fully optimised your Google Business Profile with accurate contact details, hours, and services?
- Are you targeting location-specific keywords (e.g., "insurance broker in Birmingham" or "landlord insurance Surrey")?
- Are you actively collecting and responding to Google reviews from clients?
- Do you have dedicated location pages for each area, branch, or region you cover?
- Are your business details consistent across directories, listings, and third-party aggregator profiles?

For brokers targeting specific towns or regions, local SEO is one of the highest-intent channels available, and most firms are not using it well.

4. Paid Ads (Google Ads & Paid Social)

Generate qualified enquiries and compete where aggregators dominate.

- Are your campaigns targeting high-intent, niche keywords rather than broad terms dominated by comparison sites?
- Are Google Ads structured around specific product lines, client types, and service areas, not generic insurance terms?
- Do your ads direct users to relevant, dedicated landing pages with a clear call to action?
- Are you using geo-targeting to focus spending on your actual service areas?
- Are calls, form submissions, and enquiries tracked accurately so you know which campaigns generate real leads?
- Does your ad copy comply with FCA financial promotion rules?

A well-managed PPC strategy for insurance focuses on the niches and intent signals where brokers and MGAs can win, not just where the search volume is highest.

5. Social Media & Professional Authority

Build credibility and stay visible with the right audiences.

- Are you active on LinkedIn, the primary platform for commercial lines, B2B insurance, and professional connections?
- Are you sharing useful content such as policy guides, industry updates, claims tips, or product explainers, rather than just promotional posts?
- Do your profiles highlight specialist expertise, key covers, and the sectors or client types you serve best?
- Is your social presence aligned with your website in tone, branding, and the products you promote?
- Are enquiries and direct messages handled promptly and professionally across all channels?

In insurance, trust takes time to build. Your social presence should reflect the expertise your clients are already relying on.

Bonus: Strategy, Performance & Lead Quality

Turn digital marketing into a reliable, measurable growth channel.

- Have you defined clear goals, e.g., "increase commercial lines enquiries by 30%" or "grow local GBP visibility across three branches"?
- Are you tracking enquiries, calls, and form submissions by channel so you know where leads are actually coming from?
- Are performance reports reviewed regularly and used to make decisions — not just filed away?
- Are you focused on qualified enquiries, not just website traffic or search rankings in isolation?

[] Do you have a clear digital marketing strategy that reflects your renewal cycles, product mix, and growth priorities?

A specialist insurance marketing agency aligns your digital activity with real commercial outcomes, enquiries, policies, and profitable growth.



Score Yourself

Score	What it means	Next step
0 - 15 ticks	Foundations need work	Start with visibility, compliance, and trust signals
16 - 30 ticks	Solid base in place	Refine targeting, improve conversions, and scale activity
31 - 45 ticks	High-performing strategy	Keep optimising, and explore new growth channels

Want Expert Help Reviewing Your Score?

Book a free consultation with a specialist insurance marketing agency.

We'll review your checklist, identify the gaps that are holding your firm back, and show you how to generate more qualified enquiries while staying fully FCA compliant.

 [Book a Free Consultation](#)