



STARTING YOUR FACEBOOK-  
FOR-BUSINESS JOURNEY



# FACEBOOK 101





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

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# ***INTRODUCTION***

*WHY USE FACEBOOK  
FOR BUSINESS*

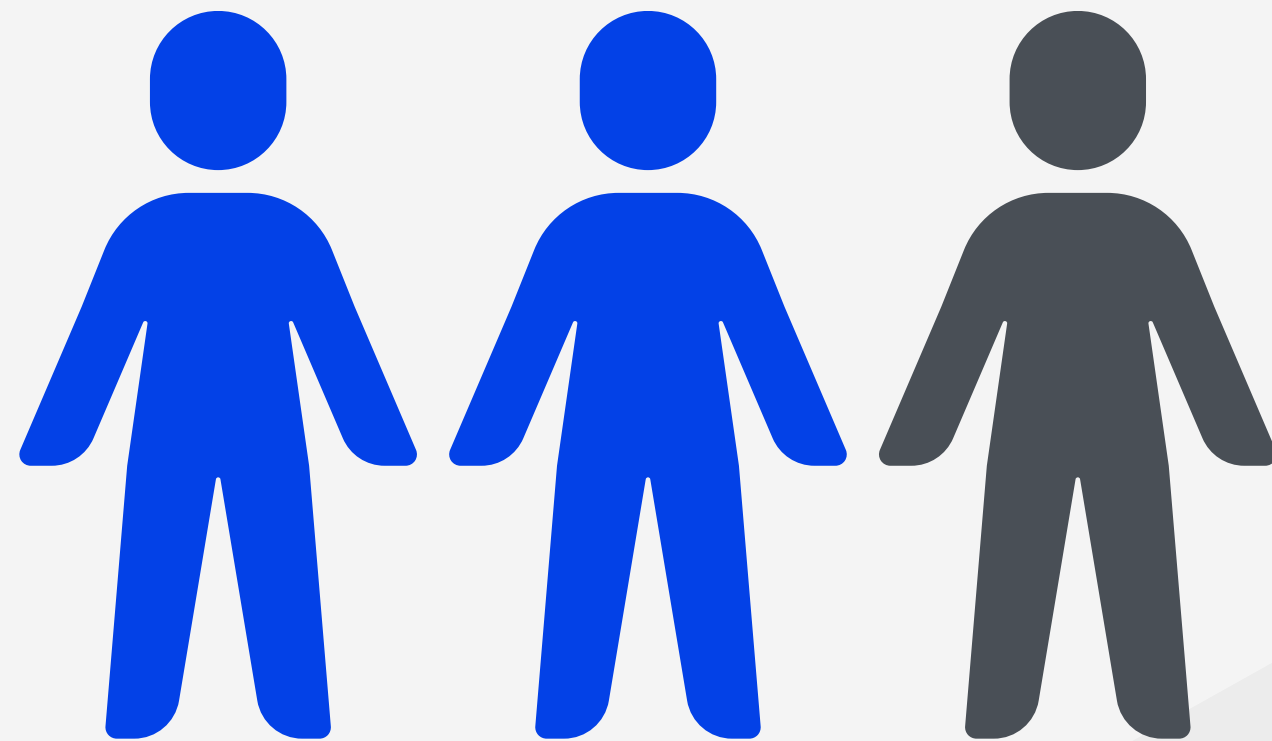




# **WHY SHOULD YOU CARE ABOUT FACEBOOK?**

As of the end of 2021, Facebook boasted 2.91 billion monthly active users. \*

\* <https://investor.fb.com/investor-news/press-release-details/2022/Meta-Reports-Fourth-Quarter-and-Full-Year-2021-Results/default>



69%

2/3 of Facebook users visit a local business page at least once every week. \*

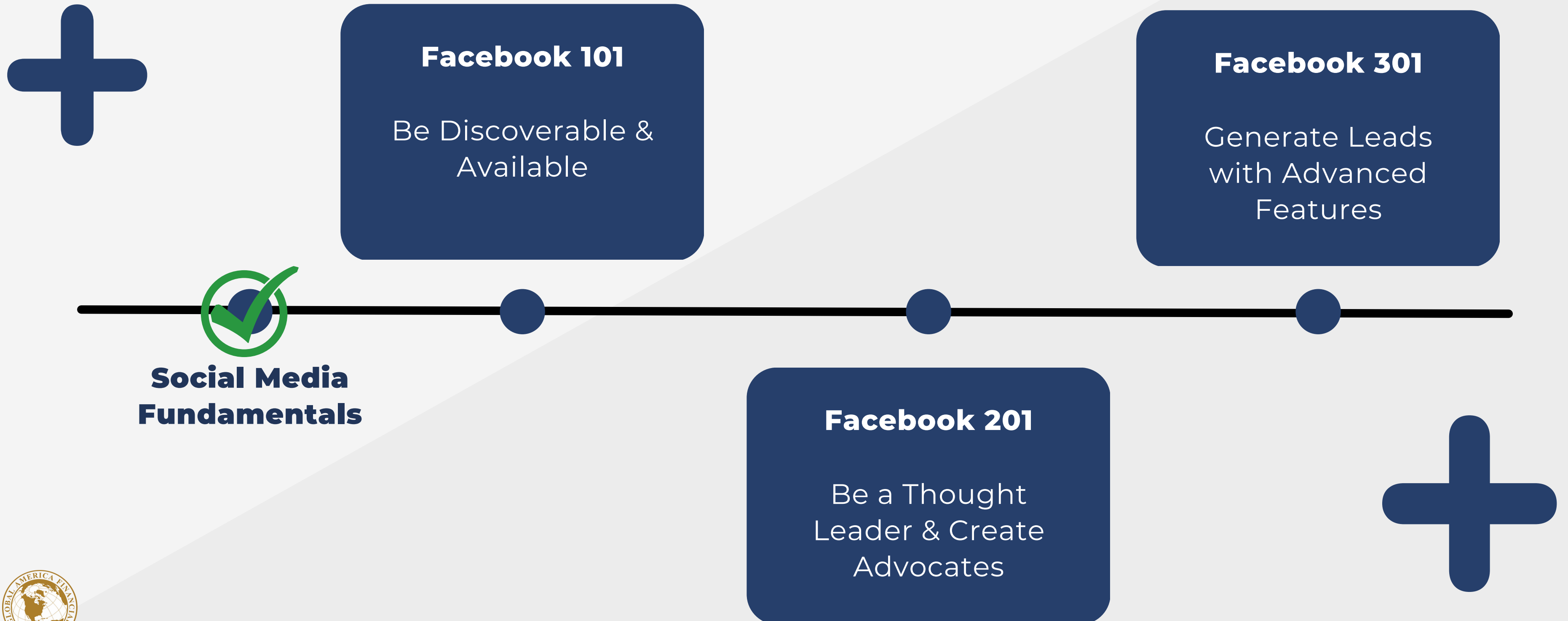
Around 7 out of 10 U.S. adults use Facebook. \*\*

\* <https://www.omnicoreagency.com/facebook-statistics/>

\*\* <https://www.pewresearch.org/internet/2021/04/07/social-media-use-in-2021/>

# ***THE JOURNEY TO USING FACEBOOK FOR BUSINESS***

The Facebook training series is designed around three major goals of using Facebook for your business. Each goal is a bit more advanced than the next:





# CHAPTER 1

INTRODUCTION TO  
FACEBOOK





facebook

Word

Log In

# WHAT IS FACEBOOK



## NAVIGATING THE WORLD OF FACEBOOK

In order to be discoverable, you'll need to create a Facebook business page. Before you can do that, however, Facebook requires you first create a personal page. Don't worry, though. Users won't be able to see or navigate to your personal page from your business page.

If you don't already have a personal page, don't let that be your barrier to entry. You don't have to create a fancy one. In fact, you can do the bare minimum required. Just go to [facebook.com](https://www.facebook.com) to create your account.

# FACEBOOK BASICS

## NAVIGATING THE FACEBOOK HOMEPAGE

Once you have a personal account, you'll reach the Facebook homepage. There's a lot going on, so we called out some of the major components here:

### WHAT'S ON YOUR MIND?

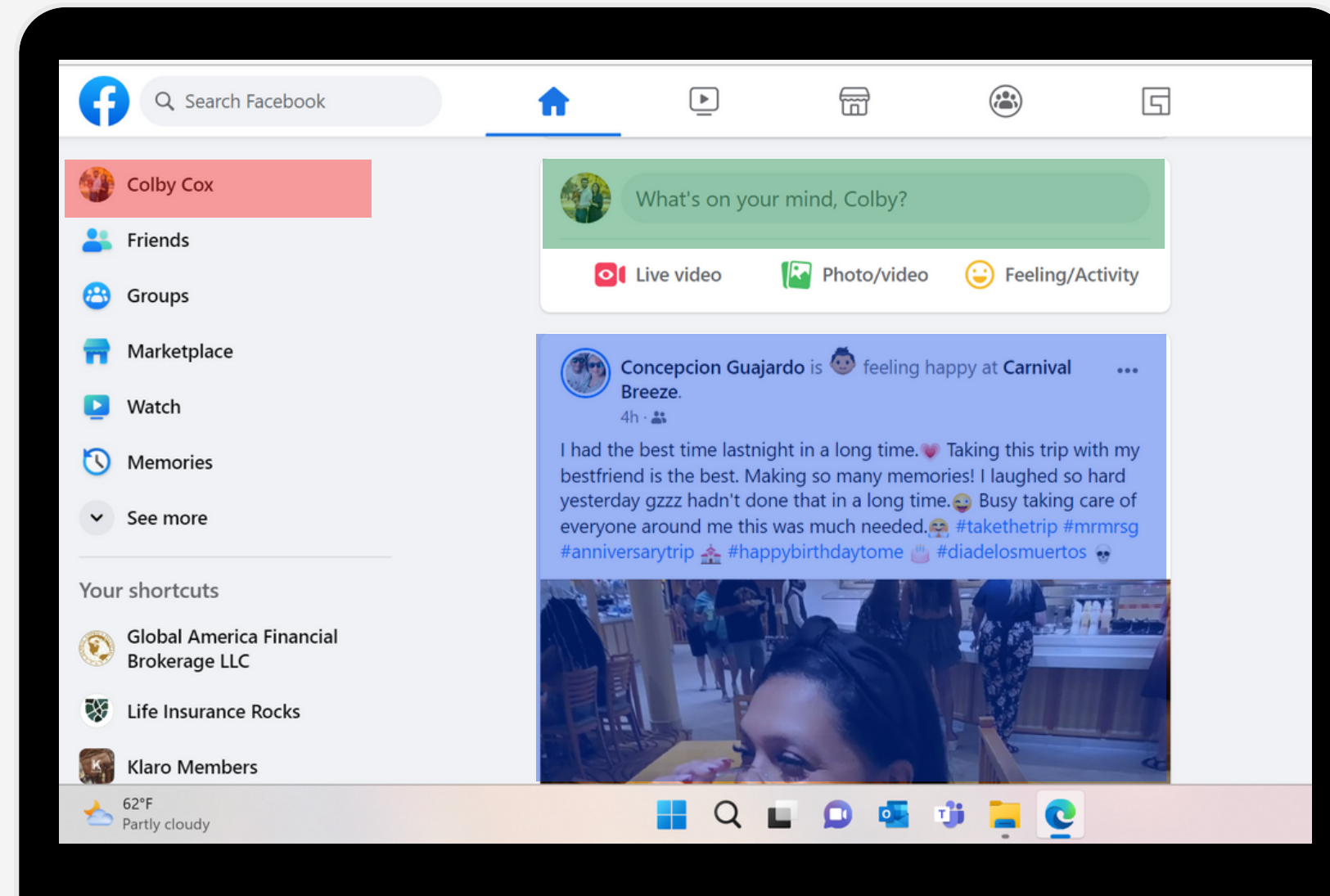
This allows you to create a post and publish it to your account.

### NEWS FEED:

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

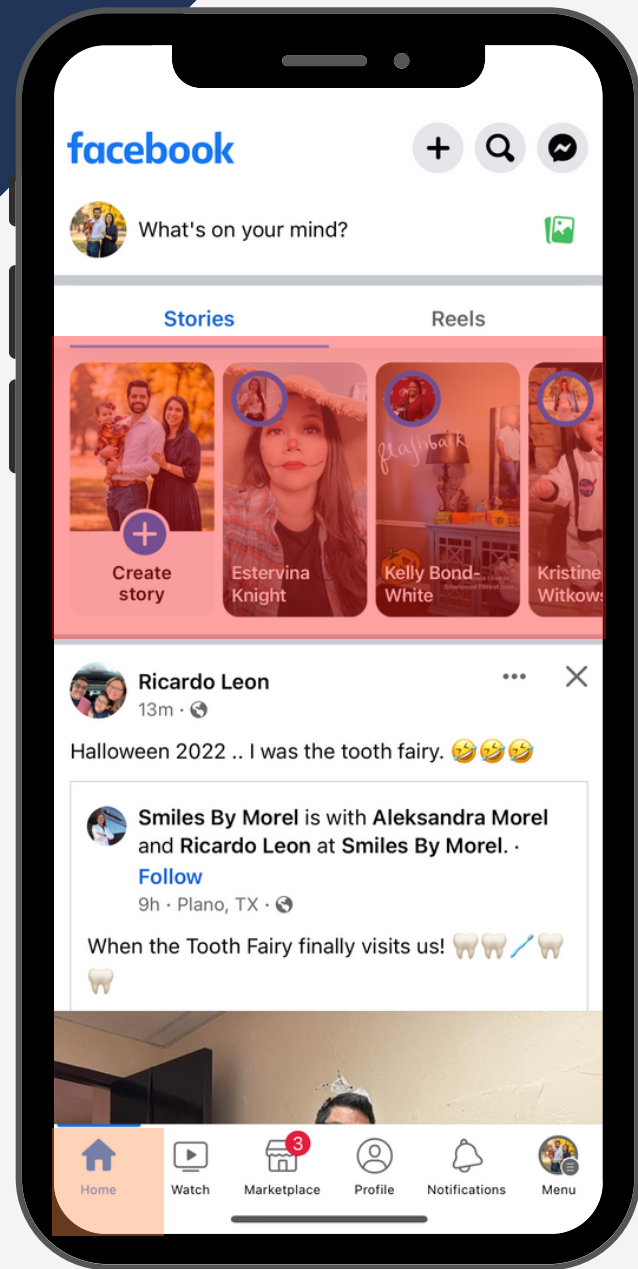
### YOUR PROFILE:

A navigational button (displaying your first name or person icon) that brings you to your personal profile when clicked.



# FACEBOOK BASICS

NAVIGATING THE FACEBOOK HOMEPAGE (CONT.)



## HOME BUTTON:

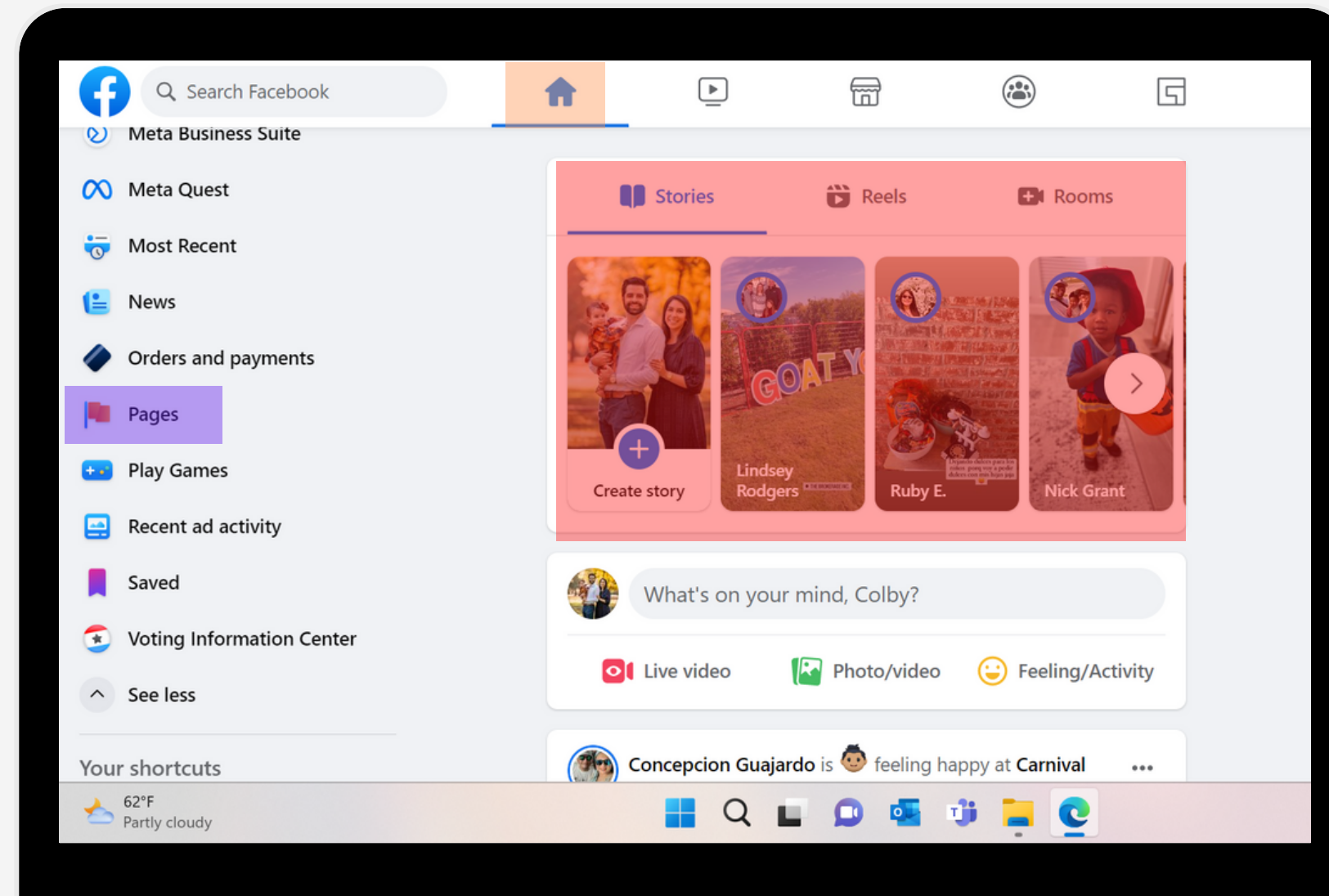
A button that allows you to navigate back to this homepage. If you're ever lost, simply hit this button.

## YOUR PAGES:

If you run a business account, this box will provide a place to perform common actions or navigate to your business page.

## FACEBOOK STORIES:

A type of post featuring photos or videos that will disappear after 24 hours.



# FACEBOOK BASICS

## NAVIGATING A STANDARD FACEBOOK POST



### PROFILE AUTHOR:

The profile picture and profile name appear at the top of each post. If a user shared the post, the same information will be included, followed by “shared a post.” The author of the original post, and its original copy, will be located at the bottom of the visual.

### POST COPY:

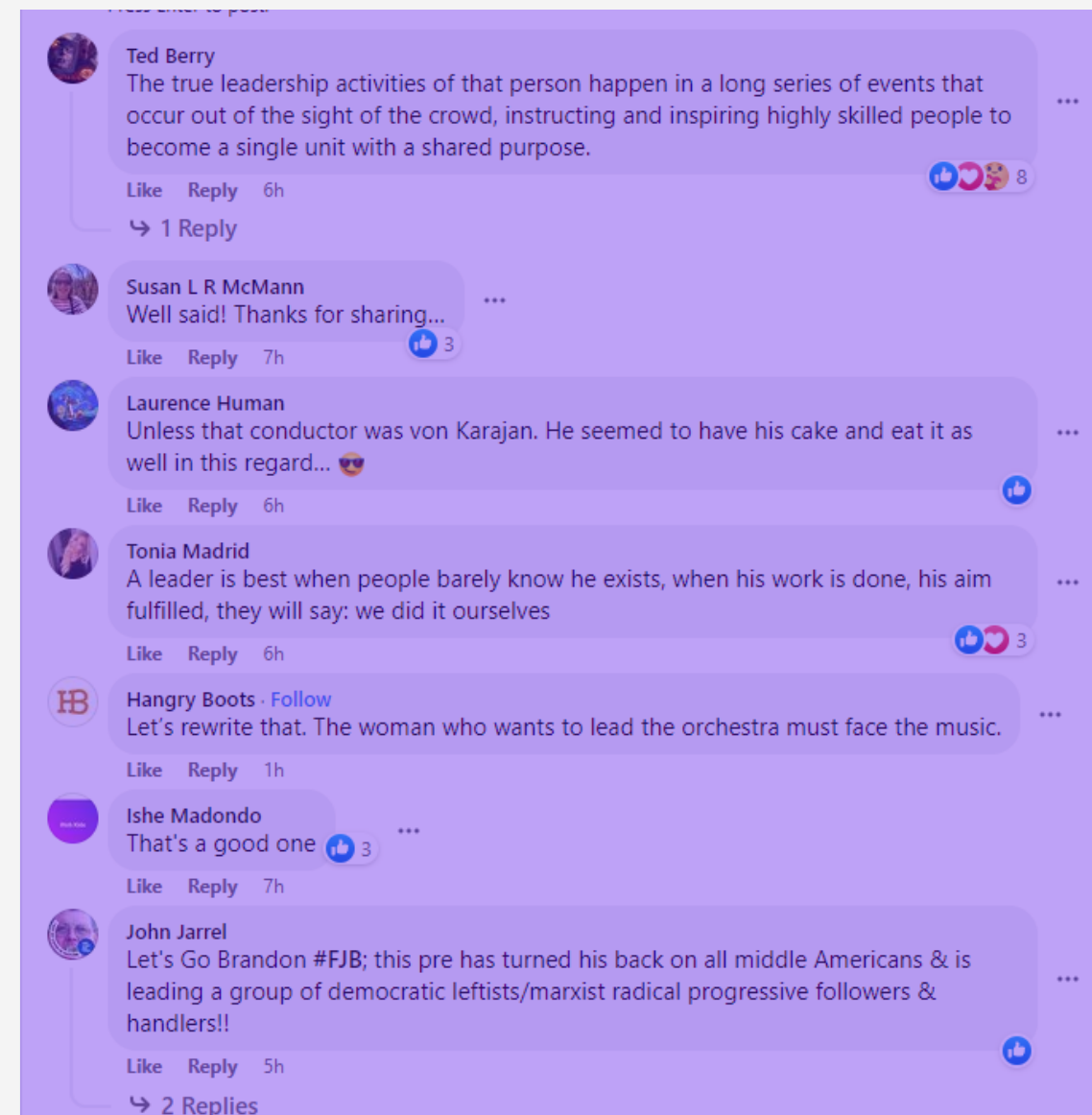
Text accompanying the visual. While posts can be created with only text, it’s not advised.

### POST ASSET:

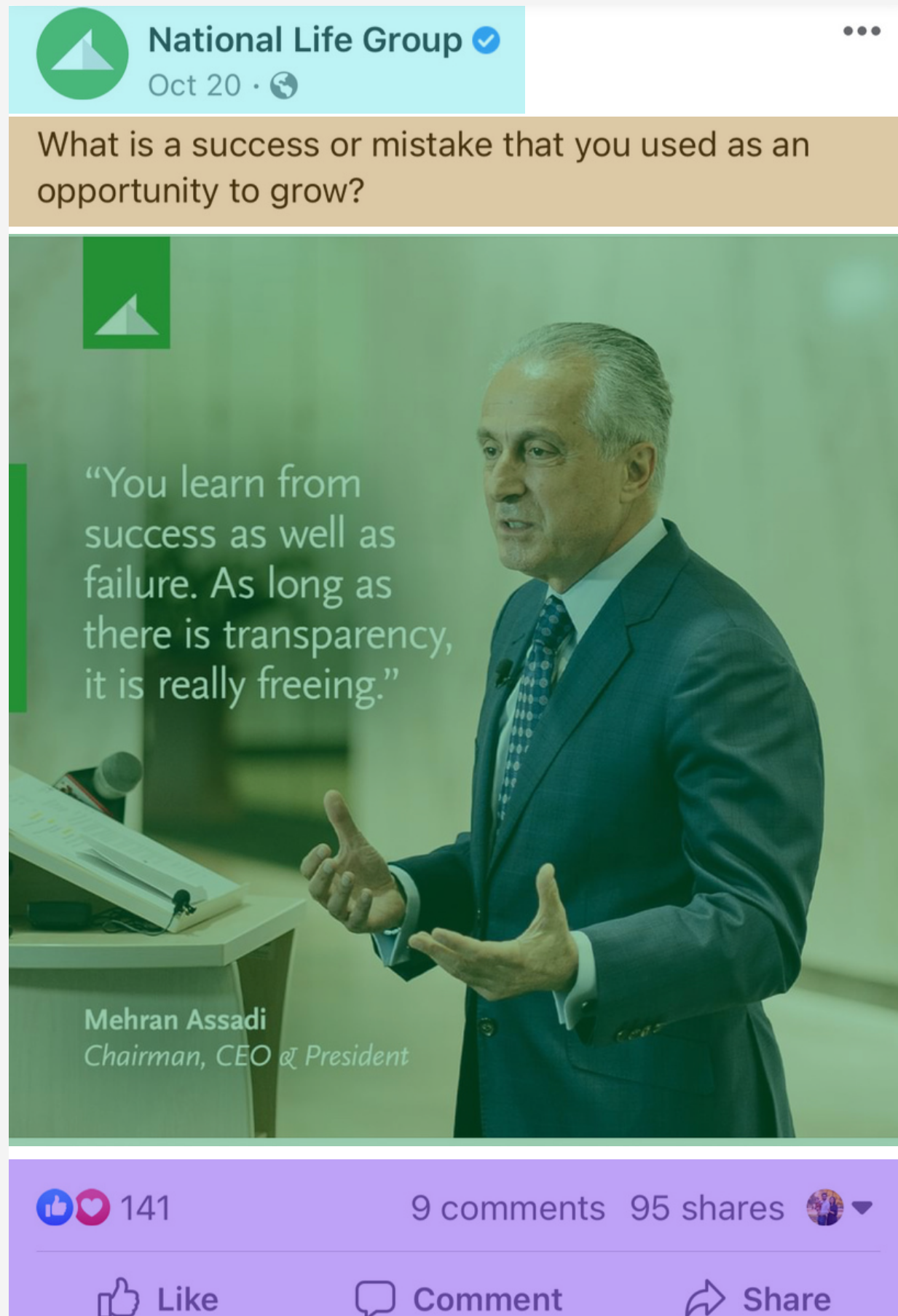
Users can post a single photo, multiple photos, video, multiple videos, links to webpages, and more. If a link is shared, a visual will automatically be generated along with a headline (e.g., “This is Why Firstborn...”).

### 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 to their own timeline. Users can also react to or comment on other users’ comments, creating a dialogue.



# FACEBOOK BASICS



## PROFILE AUTHOR:

If a user shares a post, their name will appear at the top accompanied by, "shared a post." The author of the original post will be located at the bottom of the visual.

## POST COPY:

Text accompanying the visual. While posts can be created with only text, it's not advised. If the user who shared the post added their own copy, it will appear at the top. The original post's copy will appear at the bottom below the original author's name.

## POST ASSET:

When a user shares a post, the post asset will appear below the author's name who shared the post, not below the original author's name.

## REACTIONS, COMMENTS, AND SHARES:

All engagement numbers will appear in the same place on posts that are shared..





# CHAPTER 2

CREATING A FACEBOOK  
BUSINESS PAGE





# ***FACEBOOK FOR BUSINESS***

## WHAT IS A FACEBOOK BUSINESS PAGE?

Now that you have a personal page, you can create a Facebook business page. These pages have multiple functionalities that individual pages do not, including the following:

- The ability to gain “followers” as opposed to “friends”
- The ability to list out business details like contact information, website URLs, and more
- The ability to list out services, offers, events, and more
- The ability to analyze account data and activity (Review our 201 course for more information)
- The ability to advertise (Review our 301 course for more information)

# CREATING A BUSINESS PAGE

The following slides provide step-by-step instructions for how to create a Facebook Business page. Begin by going to [facebook.com/business](https://www.facebook.com/business):

## STEPS ON THIS PAGE

1. Go to [facebook.com/business](https://www.facebook.com/business).
2. Click on “Create a Page.”

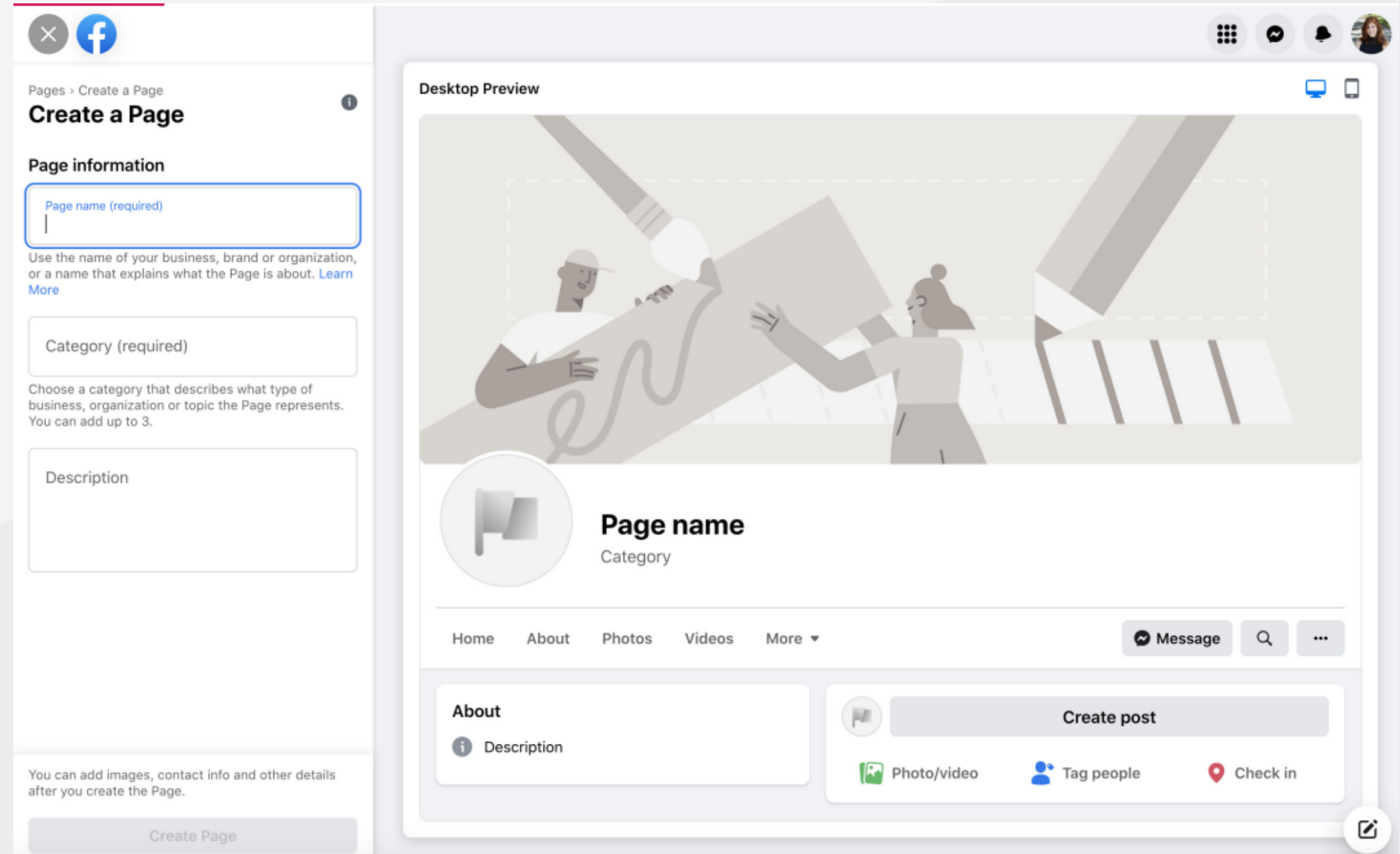
The screenshot shows the Facebook Business website landing page. The browser address bar displays <https://www.facebook.com/business>. The page features a navigation bar with the Meta logo and links for Business Solutions, Technologies, Inspiration, and Education and Resources. A search icon and a 'Support' link are also present. Two prominent buttons are visible: 'Start Now' and 'Create a Page'. The main content area has a light blue background and includes a 'Personalized Marketing Plan' section with the headline 'Connections can take your business anywhere.' Below this, it states: 'Create your personalized plan and meet the tools, insights and resources from Meta that help you turn connections into opportunity.' A video player shows a food truck scene with a 'Suggested Goal' overlay that reads 'Connect with customers. Take your business online.' At the bottom of the video, a 'Bay Bakery Food Truck' page card is visible. The browser's taskbar at the bottom shows the system tray with a temperature of 62°F, weather 'Partly cloudy', and the date/time '9:04 PM 10/31/2022'.



Then, fill out the basic information for your new business page:

## STEPS ON THIS PAGE

1. Click on “Get Started” on the “Business or Brand” tile.
2. Create a page name — something unique like “Your Name – Your Org” (Example: John Smith – Global America Financial).
3. Choose your category — choosing between “Insurance Agent” and “Financial Consultant.”
4. Fill Out Your Info and press “Continue.”



The image shows two side-by-side screenshots from a Facebook browser window. The left screenshot is the 'Create a Page' form, and the right screenshot is a 'Desktop Preview' of the page being created.

**Create a Page Form:**

- Page name (required): A text input field with a blue border.
- Category (required): A dropdown menu.
- Description: A text input field.
- Buttons: 'Create Page' at the bottom.
- Text: 'You can add images, contact info and other details after you create the Page.'

**Desktop Preview:**

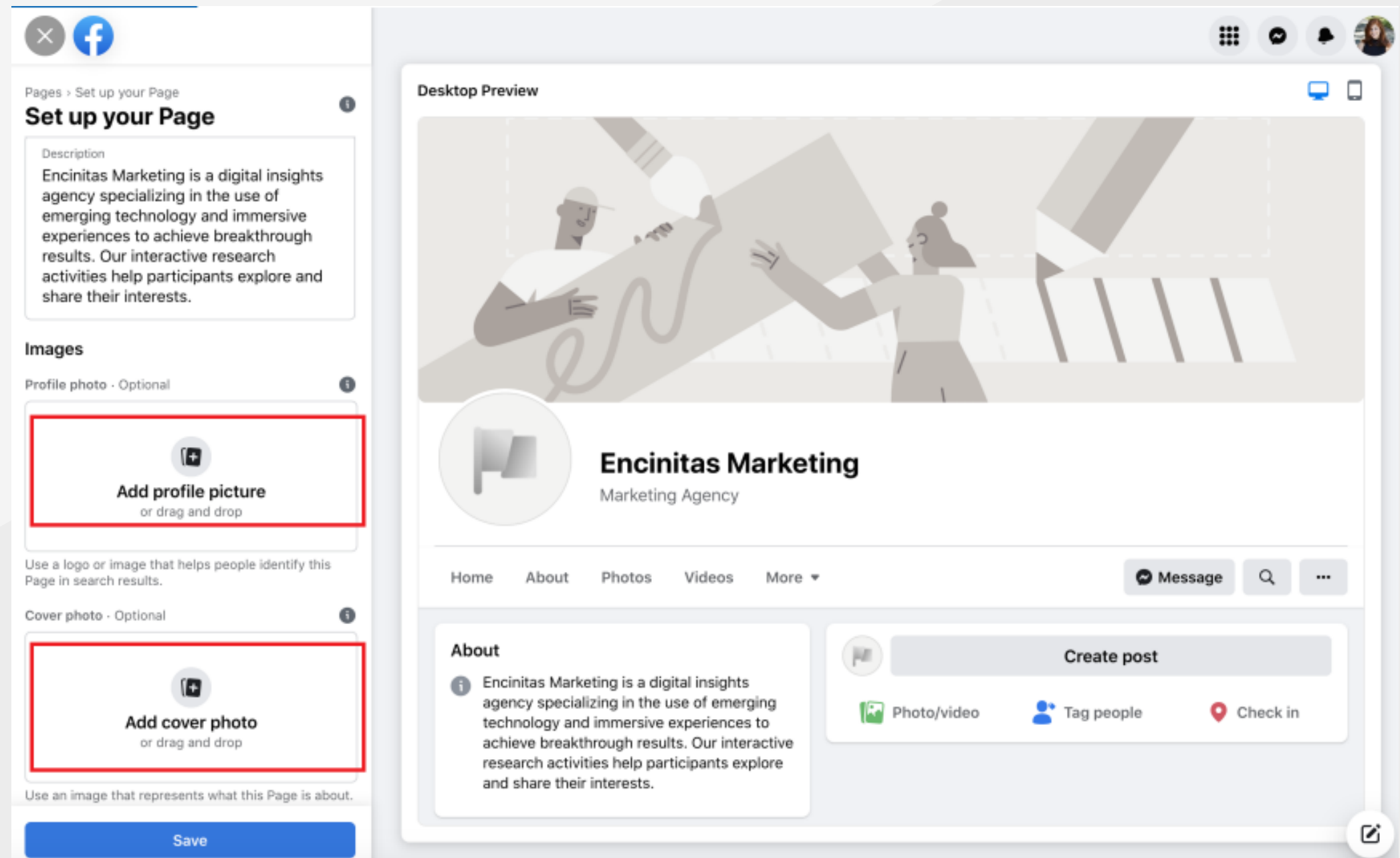
- Header: 'Desktop Preview' with desktop and mobile icons.
- Image: A large illustration of two people working on a large sheet of paper.
- Page name: A circular profile picture placeholder, the text 'Page name', and 'Category' below it.
- Navigation: 'Home', 'About', 'Photos', 'Videos', 'More', 'Message', search, and a menu icon.
- Post creation: 'Create post' button, 'Photo/video', 'Tag people', and 'Check in' options.
- Footer: 'About' section with a 'Description' link.



Next, upload your profile and cover photos. Remember, your profile photo is what will visually represent you any time you post or comment:

## STEPS ON THIS PAGE

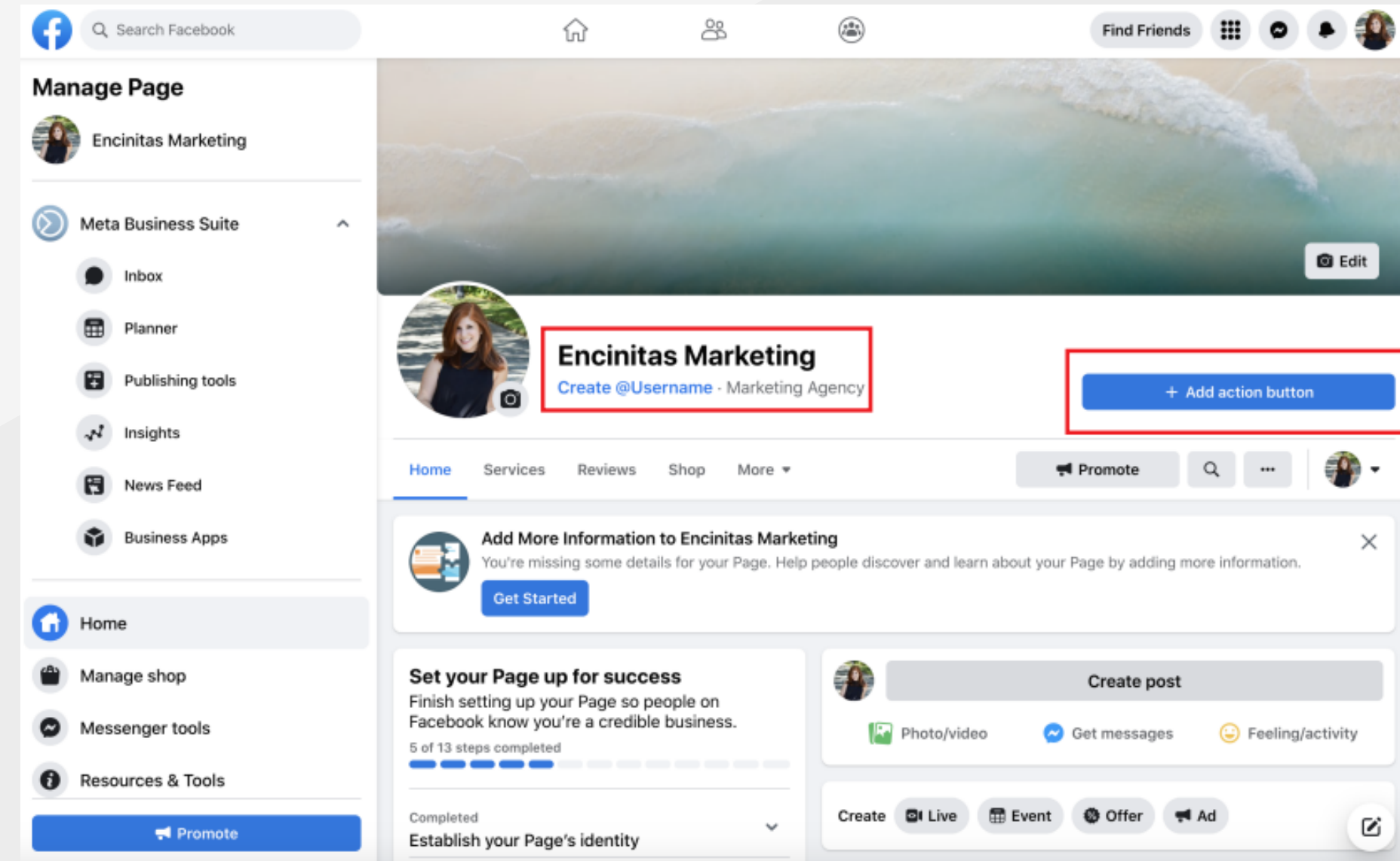
1. Click “Add profile picture” and choose a headshot or photo of yourself.
2. Click “Add cover photo” and choose a photo that represents your city OR your business.



The profile on the right is an example of what your page might look like. In order to complete your profile, we'll need to fill out a few more details:

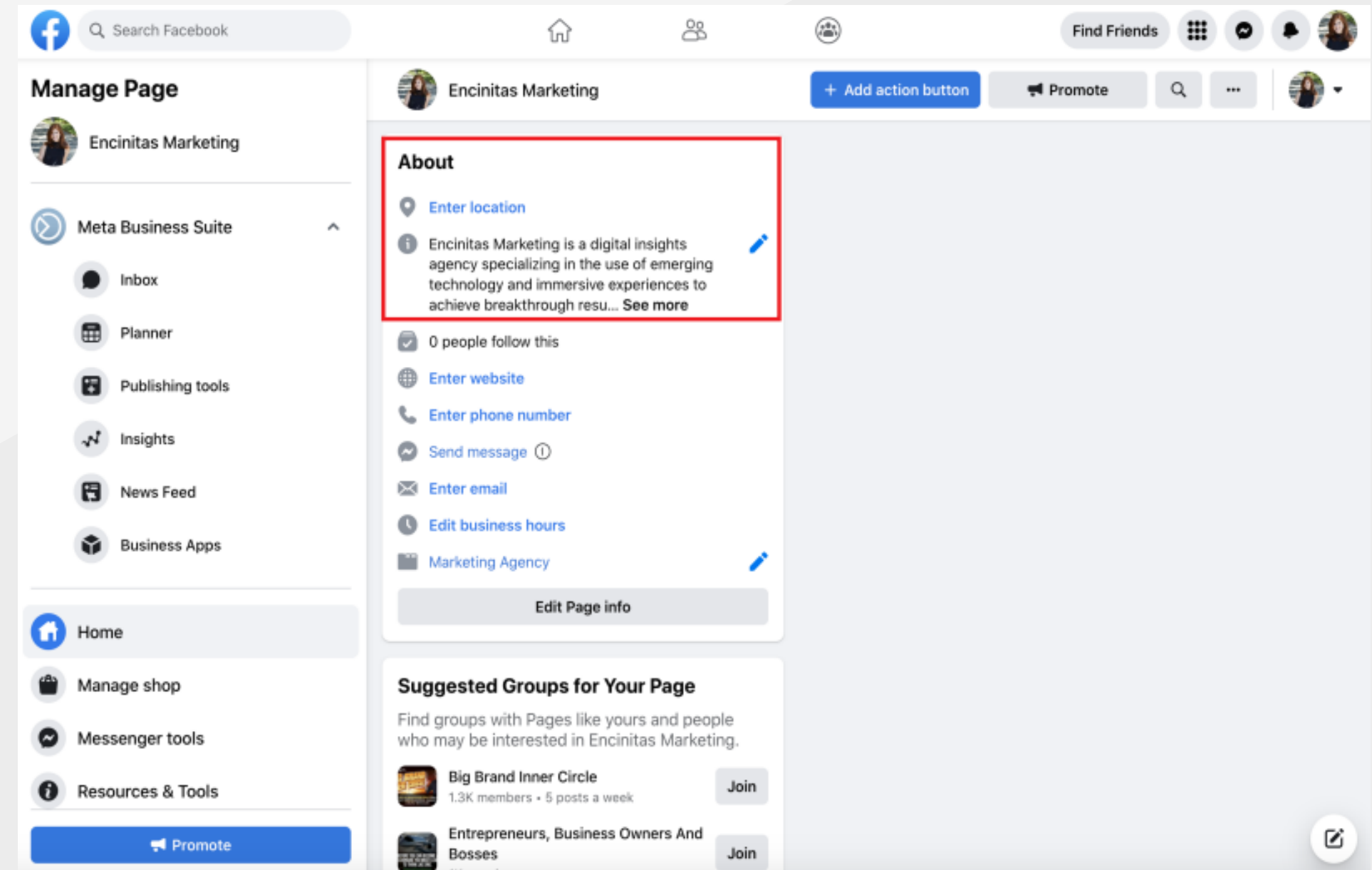
## STEPS ON THIS PAGE

1. Click “Create Page @Username” and create a name that your clients will easily remember. Something like Your Name Org could be nice. Example: JohnSmithGAF
2. Click “Add a Button” and select contact. Since people will use Facebook to contact you directly, select “Send Message.” Next, select Messenger as the way you'll communicate. Now clients can easily and quickly send you a Facebook message.



## STEPS ON THIS PAGE

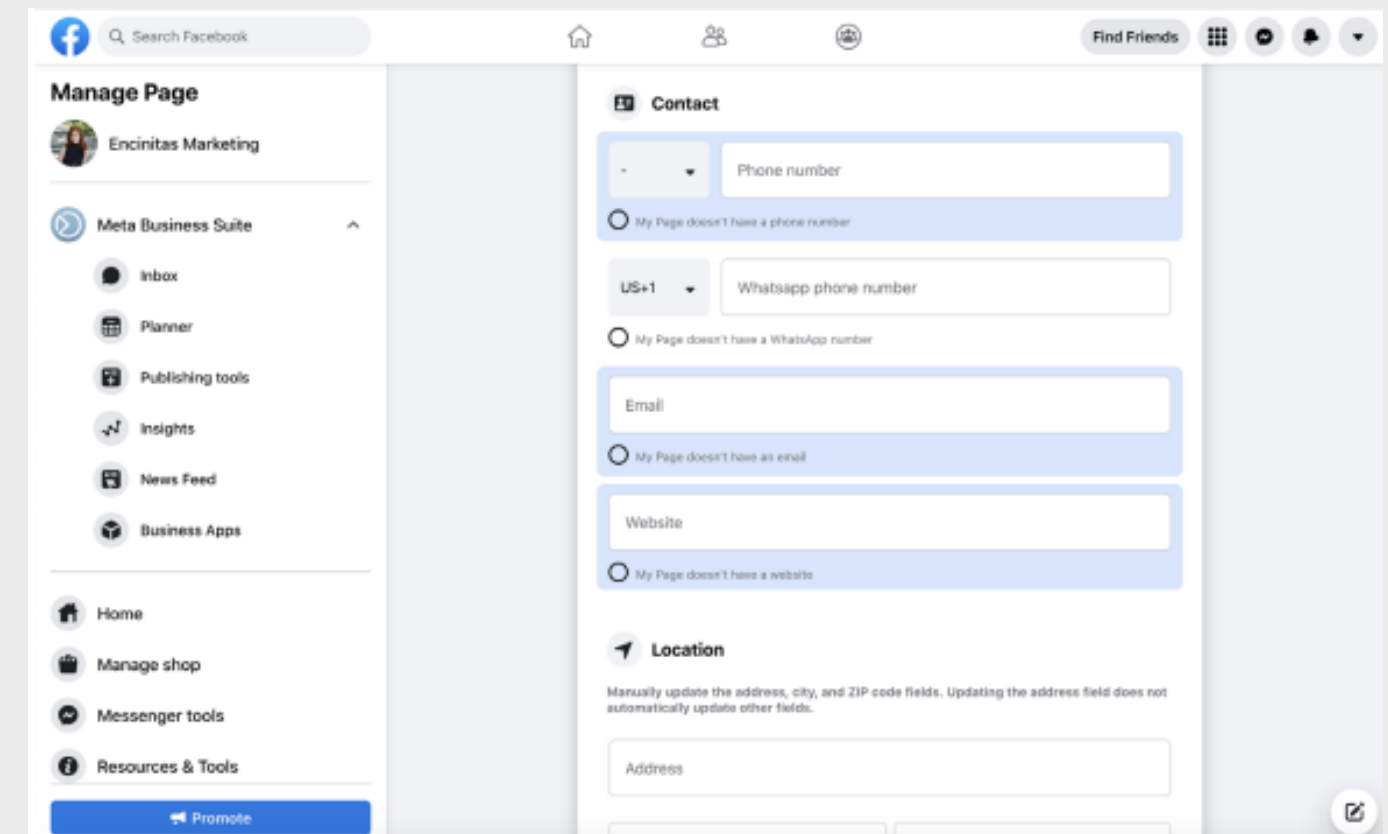
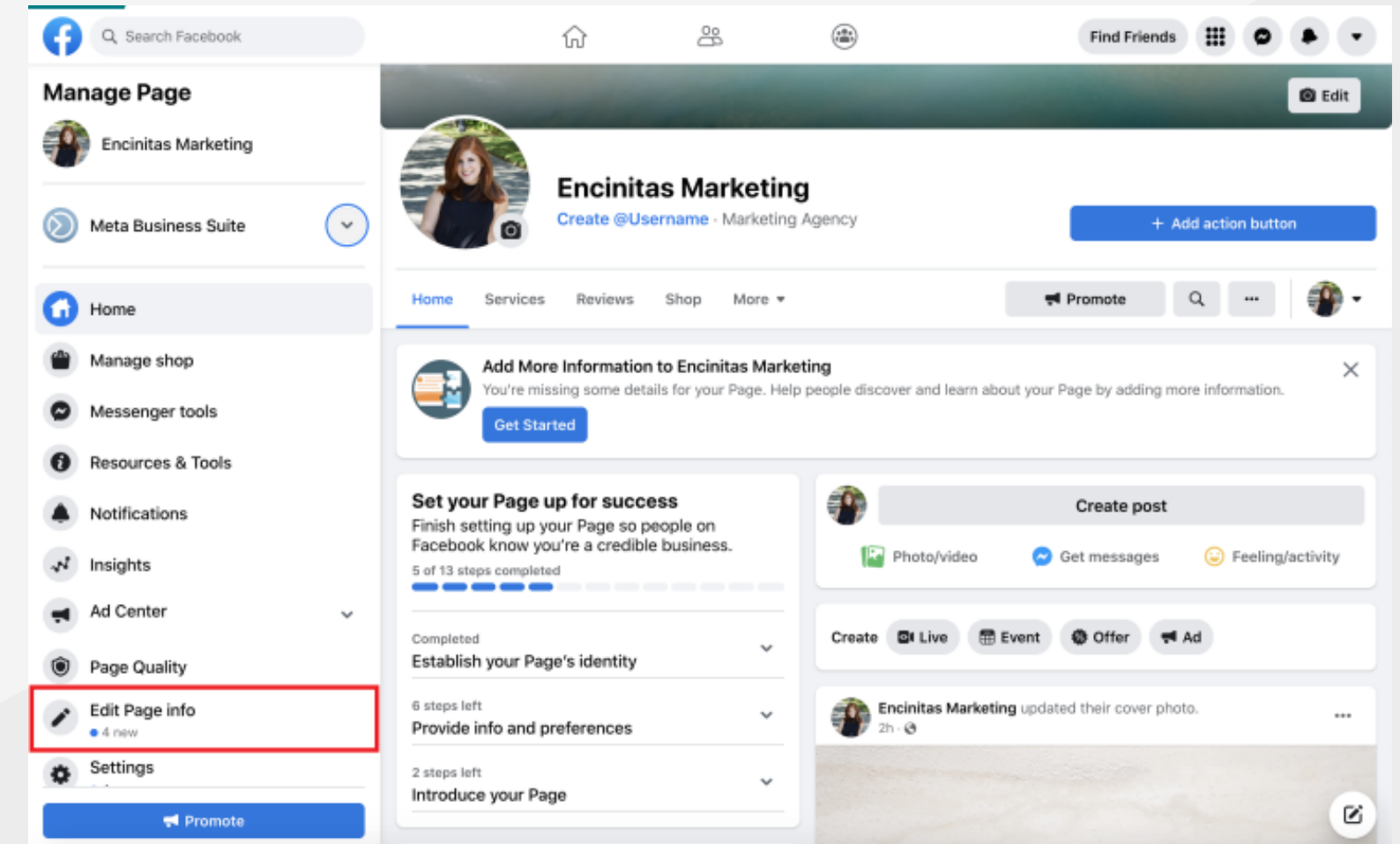
1. Scroll down to find the “About” section, where you can add a short description and write a brief summary of your business.
2. This same widget will then ask you for your phone number, website, and hours of operation. It’s advised you fill out all this information.
3. After filling out this info, you’ll be asked if you want to edit the rest of your page now or not. This is completely up to you, but it’s advised you do so. Some key information includes location of your business and your “Mission.”



A few last details can be filled out by going back to your “About” section.

## STEPS ON THIS PAGE

1. Click “Edit Page Info” and after scrolling down you will see the “Contact” section. Here you can enter all your information.
2. Your Facebook business page is now complete! You now have the opportunity to invite your friends, family, and clients to “like” and “follow” your page. Before doing so, please adhere to your legal and compliance guidelines for obtaining account approval.



# FACEBOOK BASICS

## NAVIGATING A FACEBOOK BUSINESS PAGE

### PROFILE PICTURE, PROFILE NAME/HANDLE, AND COVER PHOTO:

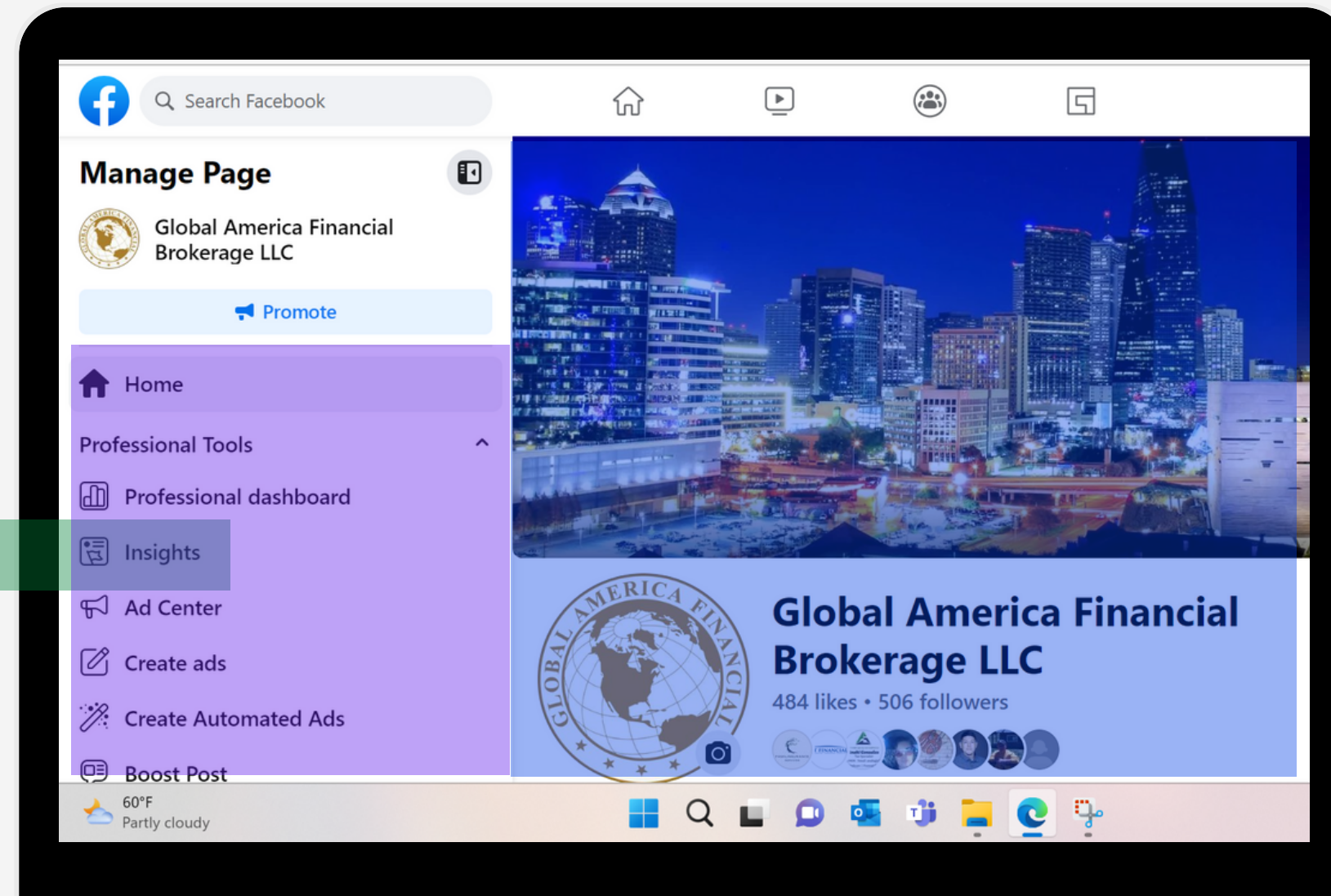
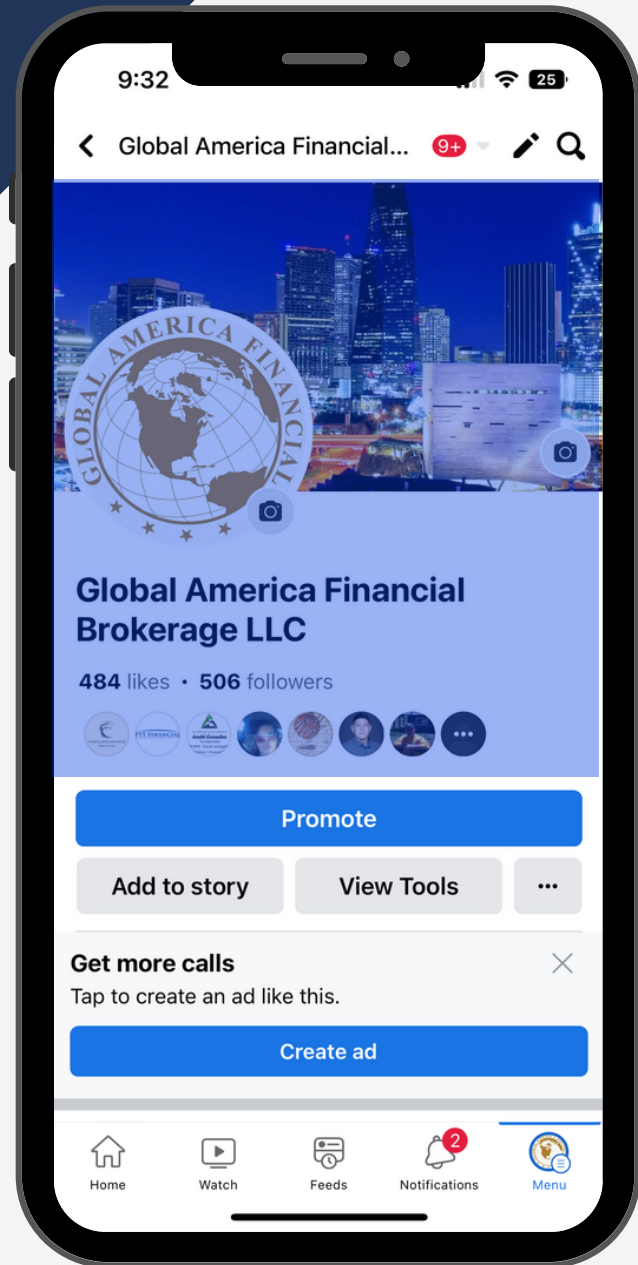
Just like a personal profile, these three aspects are standard.

### BUSINESS PROFILE SECONDARY PAGES:

Unlike a personal profile, a business profile can have several pages like a website (e.g. About, Services, Photos, etc.).

### BUSINESS PAGE INSIGHTS & ANALYTICS:

Another unique function of business pages is the ability to view page and content analytics. The widget on the bottom right, for example, will give you high-level metrics regarding your page's followers.



# FACEBOOK BASICS

## CHANGING YOUR PHOTOS

### CHANGE YOUR PROFILE PHOTO (DESKTOP):

Hover over your profile photo and click on the camera icon, then select “Upload Photo” and select a saved photo from your computer.

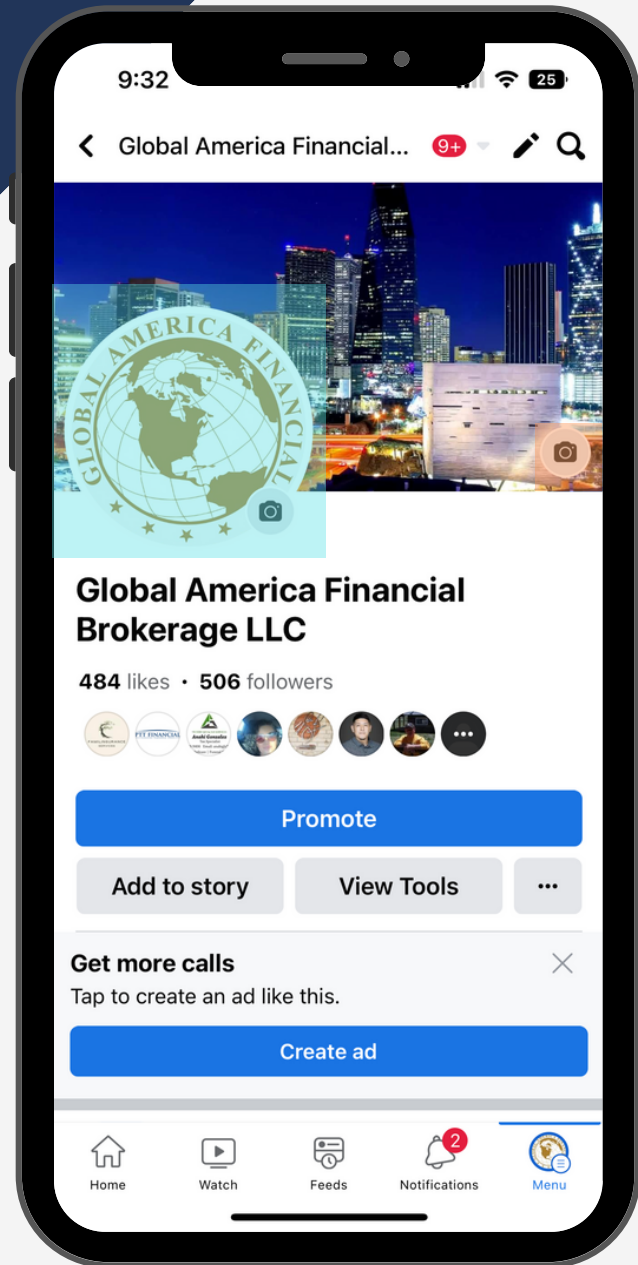
### CHANGE YOUR PROFILE PHOTO (MOBILE):

Click on your profile photo and click on the “+” sign, then select a photo saved to your phone.

### CHANGE YOUR COVER PHOTO (DESKTOP):

Hover over your cover photo and click “Edit” in the bottom right, then select “Upload Photo” and select a saved photo from your computer.

**CHANGE YOUR COVER PHOTO (MOBILE):**  
Click on your cover photo and select “Edit,” then select a photo saved to your phone





# CHAPTER 3

POSTING AND ENGAGING





# ***POSTING & ENGAGING***

## **POSTING AND SHARING ON FACEBOOK**

Once your profile is ready to use, you're ready to post content to your timeline. There are two ways to do this: sharing someone else's content and publishing original content. We're going to take a look at how to do both.

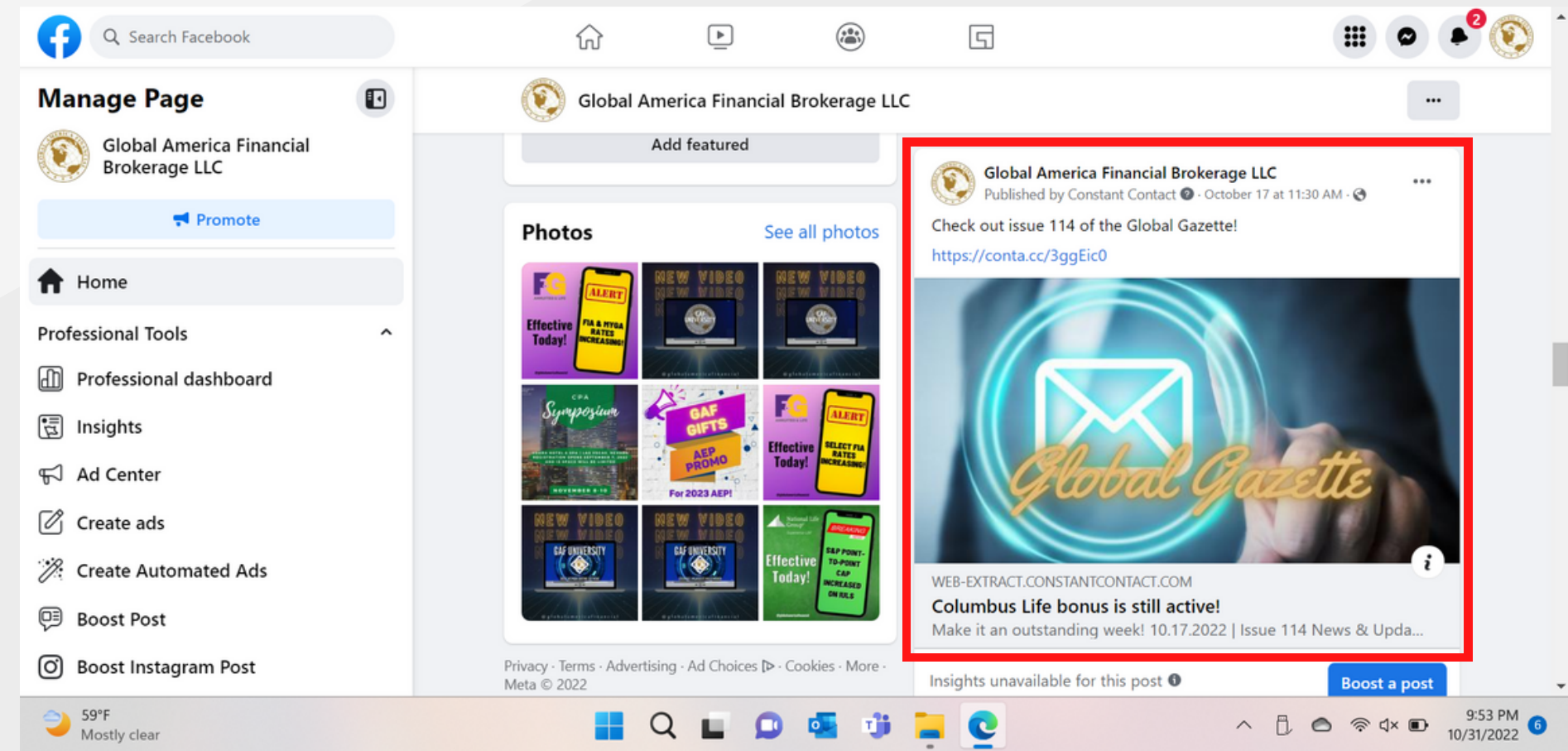
Once you start posting content, other users may comment on those posts. It's important to respond to these comments. We will cover that process at the end of this course.

# SHARING OTHERS' CONTENT

Most, if not all, carriers (along with Global America Financial) Facebook pages all have great content you can share to your followers. If you find a piece you'd like to share, complete these steps:

## STEPS ON THIS PAGE

1. Identify the post you'd like to share with your followers. Remember, any post you share you are taking personal responsibility for. The content, the author, and any website linked from the content will be associated with you and your business. So, choose content carefully.
2. We suggest only sharing content from verified carrier and GAF pages.



# SHARING OTHERS' CONTENT

Always make sure you're posting to the correct page. It's easy to accidentally share to your personal account instead of your business page.

## STEPS ON THIS PAGE

1. You'll then be given multiple choices. Select "Share to a Page."
2. Make sure to not add any new copy unless your legal council explicitly allows it.
3. Add any additional copy you would like to accompany the post. Often, additional copy isn't necessary.
4. Click "Post."

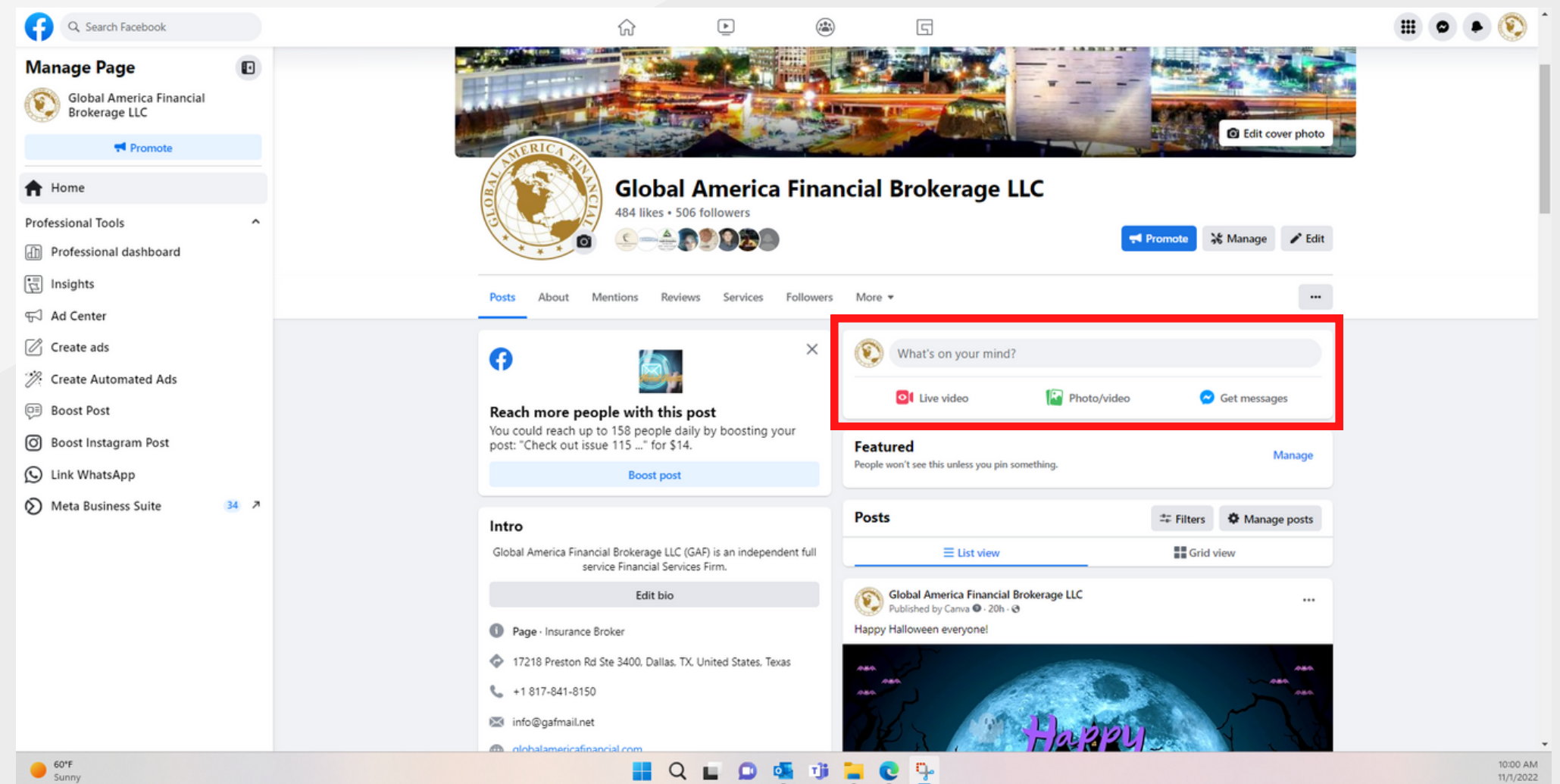


# ***PUBLISHING ORIGINAL CONTENT***

To publish original content, go to your business page and click “Create post”.  
GAF suggests you get original content legally approved prior to posting.

## **STEPS ON THIS PAGE**

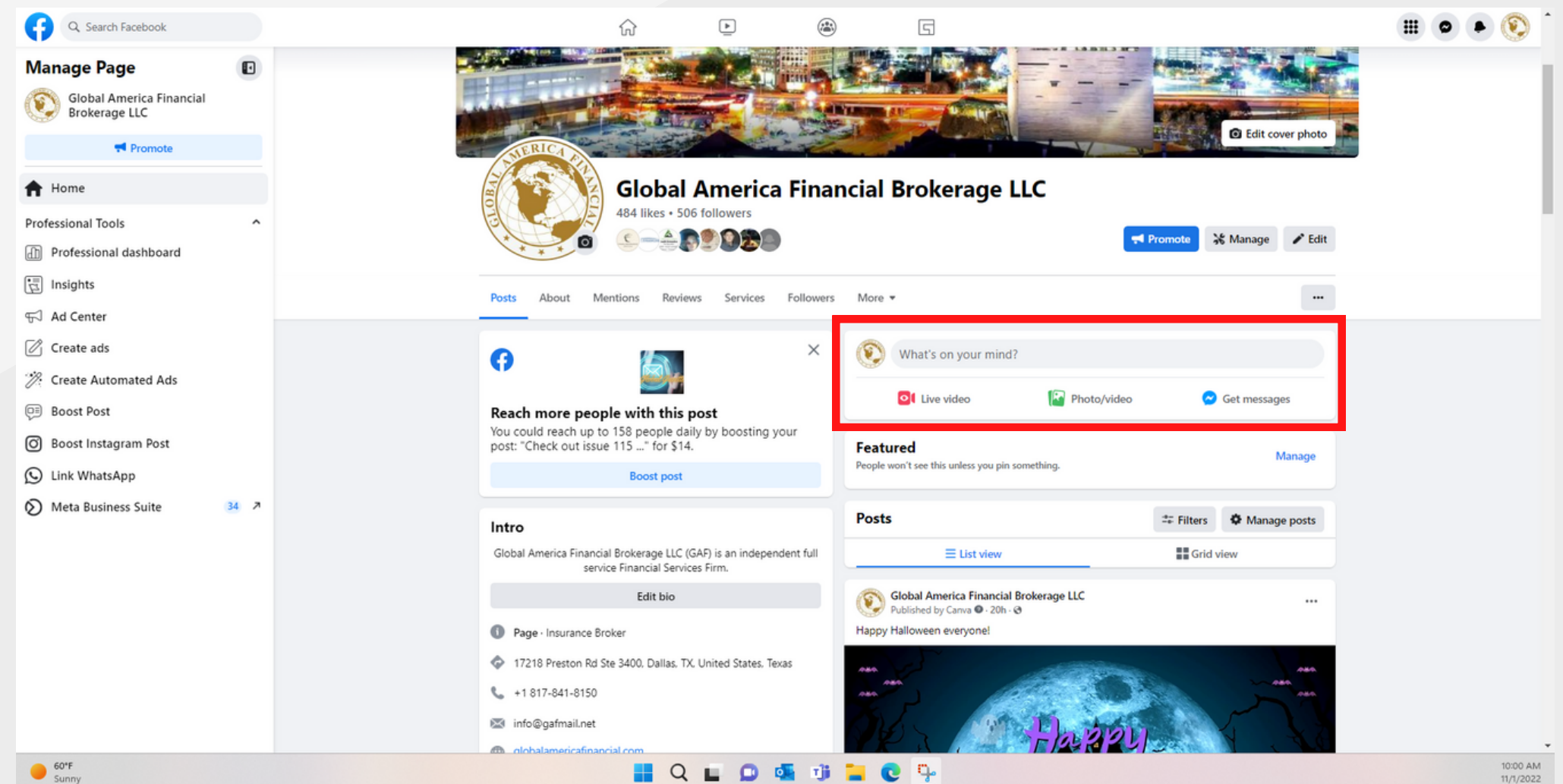
1. Check with your internal team for an existing program set-up specifically for social media publishing.
2. Create drafts of the posts you want to publish, and first get appropriate compliance approval.
3. Click on the text box in the “Create post” widget.
4. Once the widget pops up, type the copy you would like to appear in your post.



When starting out, it's highly encouraged you stick to only the post types mentioned below. The other posts are more advanced features.

## STEPS ON THIS PAGE

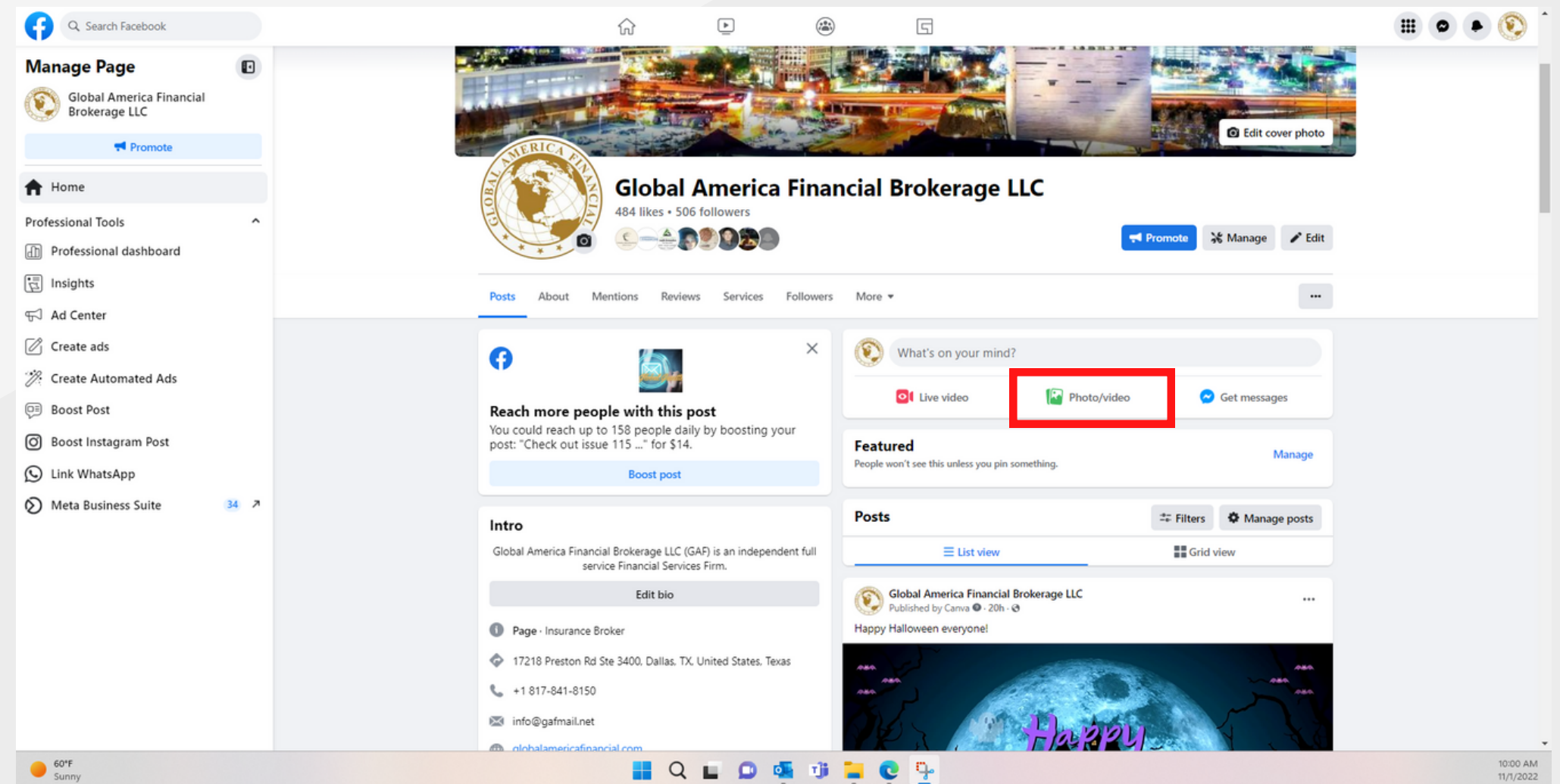
1. Below the text box are all the different types of posts you can create. The most common post types include:
  - a. Photo/Video - Choose visual(s) to appear below the copy.
  - b. Get Messages - Places a button below the post allowing users to send your page a message.
  - c. Live Video - Instead of copy and a visual, start recording yourself, your event or what you are doing and share with everyone.



The most common post type is Photo/Video. Follow the steps below to complete that kind of post.

## STEPS ON THIS PAGE

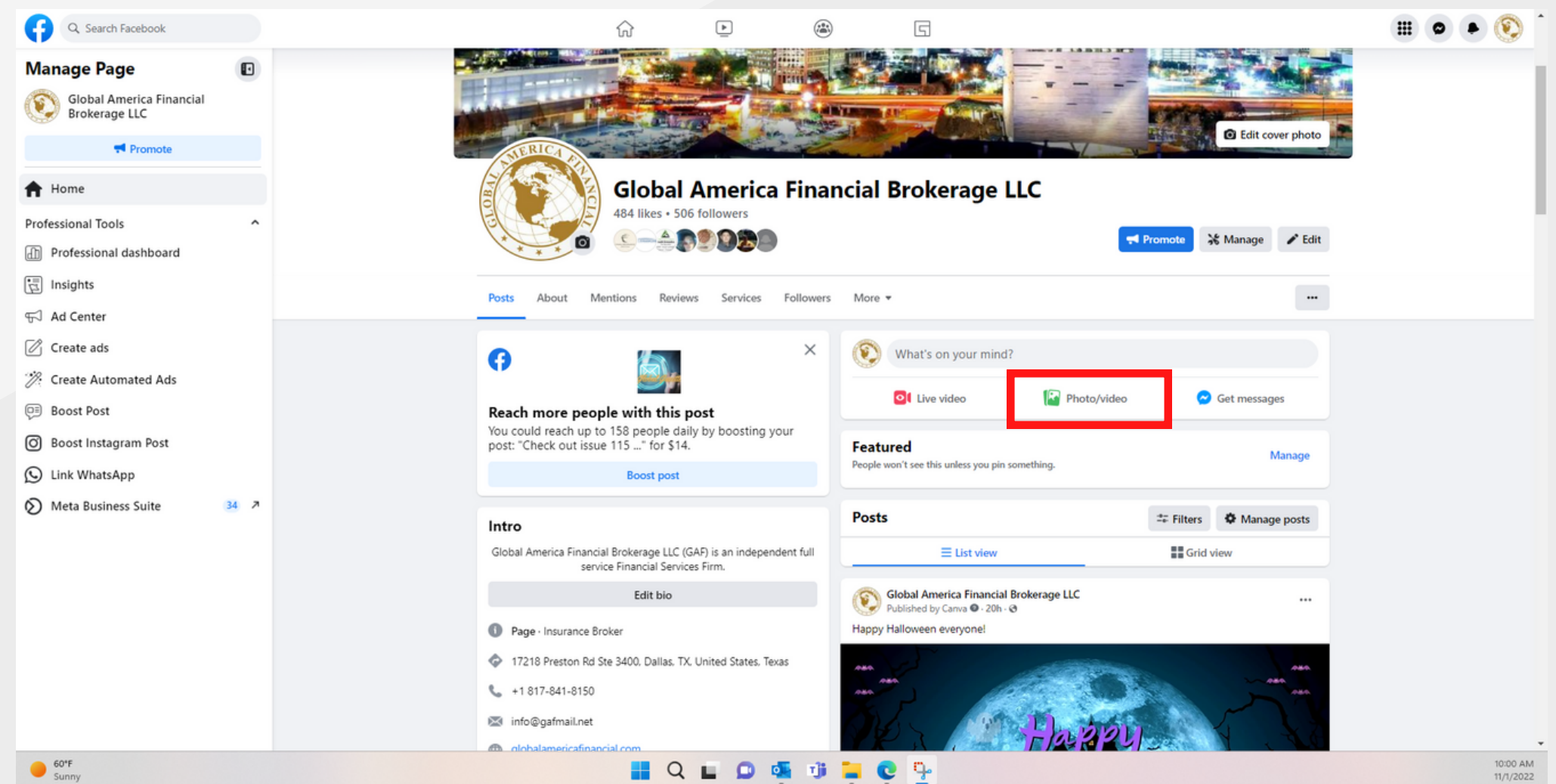
1. Click on the “Photo/video” post type.
2. Several versions of the “Photo/video” post type will appear. The most common option is “Upload Photos/Video.” Click here.
3. A window will then pop up. Select the photo(s) or video(s) you’d like to use in your post and click “Open.”



Now you're ready to post on your timeline. Make sure you post on a regular cadence to keep your profile up-to-date.

## STEPS ON THIS PAGE

1. You'll then be sent back to the "Create post" widget. Make sure to proofread your copy and make sure you selected the right visual(s).
2. Then click "Publish."





# ***ENGAGING & MESSAGING***

Engaging with and messaging other users on Facebook

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 Facebook.





## ***HOW TO DEAL WITH COMPLAINTS***

Comments can fall into three different buckets, and each bucket should be dealt with in different ways.

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 Facebook Messenger, keep the following things in mind:

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

If you or your legal council have any questions, feel free to contact us.





# ***QUESTIONS?***

YOU'RE NOW READY TO RUN  
A FACEBOOK BUSINESS PAGE

If you ever have any questions,  
please feel free to reach out to  
us!





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# THANK YOU

*Check out Facebook 201 for more!*

