



TAKING THE NEXT STEP IN  
YOUR FACEBOOK USE



# FACEBOOK 201





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After going through this course, you'll know many of the best practices needed to run a Facebook page for your business.

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# **BEING A THOUGHT LEADER**

SHARING CONTENT THAT  
CREATES ADVOCATES



# SOCIAL MEDIA GOALS

When considering social media's use in the financial services industry, there are three things we're trying to achieve. After going through our Fundamentals and Facebook 101 courses, you've become Discoverable and Available. Now, we need to focus on content to become a thought leader.



# CREATING SMART CONTENT



## NAVIGATING THE WORLD OF FACEBOOK

The first thing we need to consider when running a social media account is content. Content is what will inspire users to follow you. It's the key to success. If the content you create doesn't entertain or provide value to your followers, your content will be ignored. #ItsAllAboutTheContent

So before posting anything, first ask yourself "would my followers care about this content?" In order to win the attention war and create content that's truly "thumb-stopping", one must remember the following ...





# ***CONTENT TYPES***

With that in mind, let's look at the kinds of content we can post. In general, there are two types:

## **SHARED CONTENT**



Companies like GAF and carrier partners are constantly publishing social media posts — often linking back to valuable articles. If you find a piece of content you like, share it out to your followers. Make sure to check with your legal council to determine approved authors for sharing, as well as your ability to alter the post when publishing.

## **ORIGINAL CONTENT**



Content you create yourself is a great way to connect with your followers. Only you know what your individual clients like to learn about, and only you can showcase your personality. We advise getting this content approved by your legal team prior to publishing.



# ***CONTENT BEST PRACTICES***

Whether you're sharing or creating, there are a few best practices to keep in mind when it comes to publishing content:

## **POST TWICE A WEEK**

This allows for multiple opportunities to gain engagement, while not overwhelming your followers. That said, if once a week is less stressful, do that.

## **ALWAYS INCLUDE A CTA**

Whether you're asking your followers a question or telling them to click on a link, a call-to-action (CTA) helps them know what to do.

## **USE COMPLIANCE-APPROVED CONTENT**

Always make sure to get approval on your original content prior to publishing. Want to make your life easier? Try sharing content from the GAF or carrier partner pages. All of that content is already approved.

## **DON'T POST AT 2AM**

Try posting at times your followers might be on their phones. In the morning or during lunch hours are typically good times to hit.

## **USE HIGH-QUALITY PHOTOS ON FACEBOOK**

Never post something on Facebook with just words. Videos, infographics, and high-quality photos tend to perform well for finance-related content.

## **TRY TO BE TIMELY**

Due to compliance, it can feel impossible to post about timely topics. That's not entirely true. Try posting winter-based ideas in the winter. Or tax-related topics in March. There are always ways to plan ahead.

# CONTENT TOPICS

When thinking of content to share or create, think about your followers. By providing them with content they find valuable, you show them you put their interests first. You create a unique experience — which can turn your clients into advocates. Try sharing the following types of content:

## COMMUNITY CONTENT

Content covering your personal experience at a conference or an event you (or your office) are hosting. Showcase your community involvement!



## EDUCATIONAL CONTENT

Content focused on educating your clients. These posts show that you care about more than people's money — you care about their future



## PERSONAL CONTENT

Content highlighting you as a person. This could be your hobbies, your family, your personal goals, etc. Making sure your clients know you're human is important too.

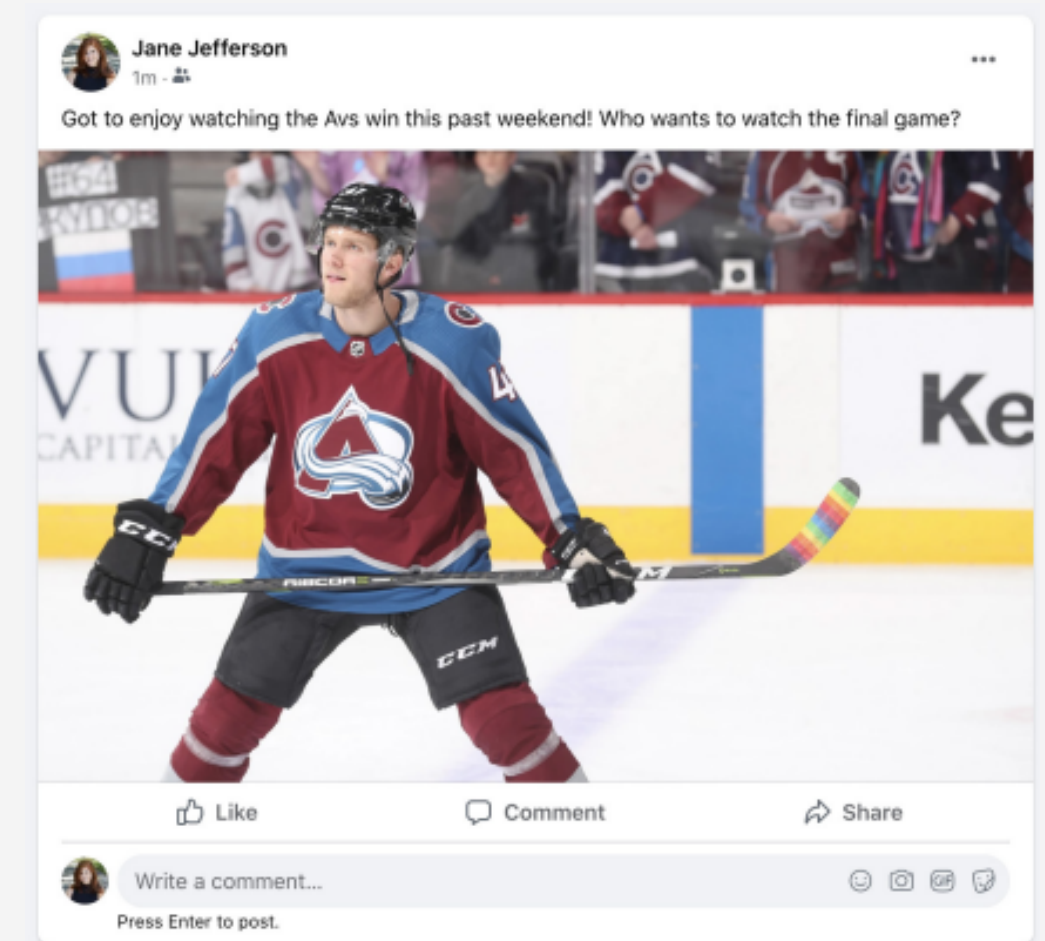


# CONTENT TOPICS - COMMUNITY

Community content should be prioritized on Facebook. Showing you're involved in your community is a great way to gain support. By posting about local events, volunteer experience, or your involvement within the financial community, your followers will see you care about bettering yourself and others.

## WHAT NOT TO DO:

- Post photos of other people without their permission.
- Post slides from any presentation at a conference or convention. Most likely these slides were not approved for public use.



**QUICK TIP:** Always make sure the photos you use aren't copyrighted. Use sites like Pexels or Pixabay to find free photos, royalty free. These high-quality photos are great to use on Instagram.

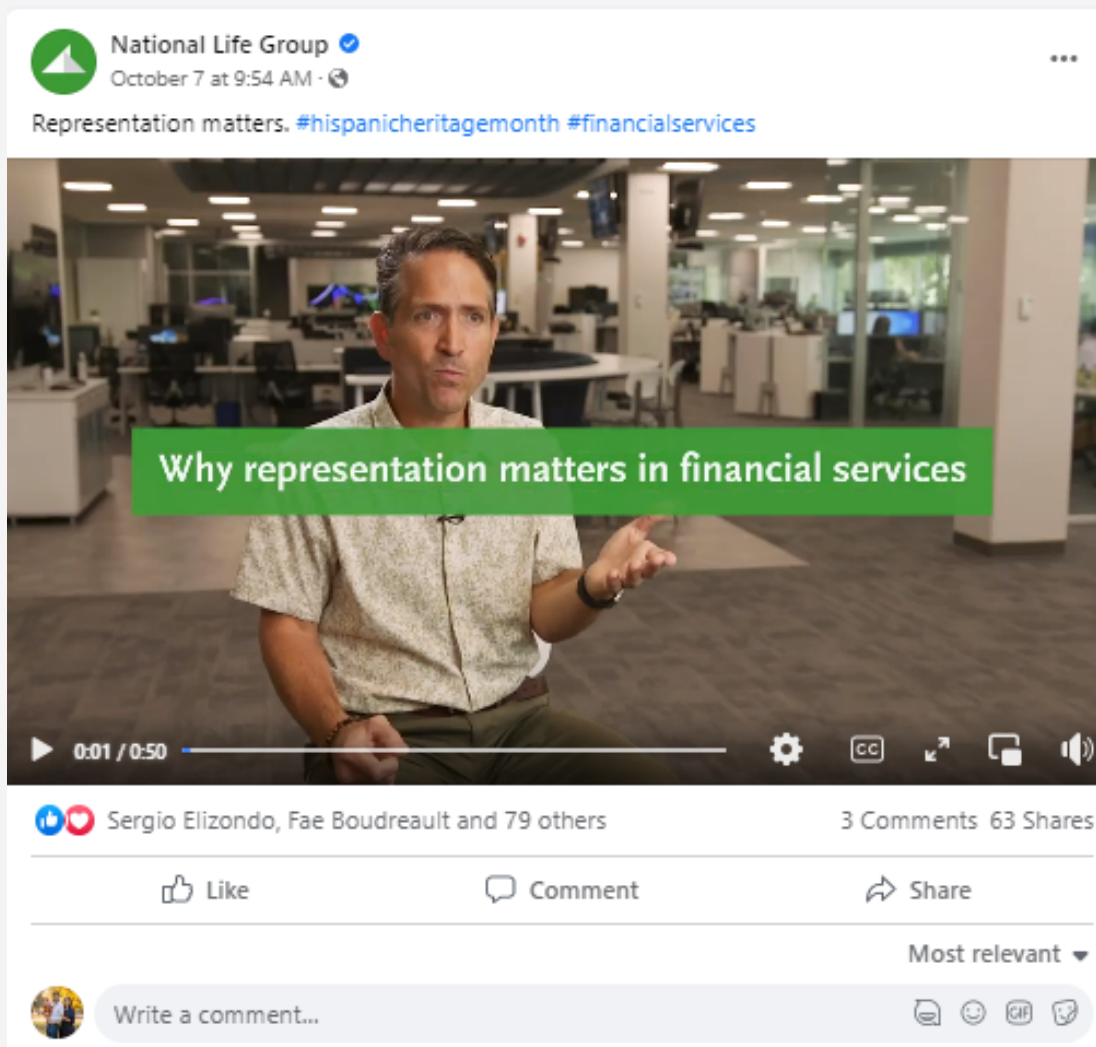


# CONTENT TOPICS - EDUCATIONAL

Insurance and finance are complicated topics. By educating your clients, you're not just their agent, you're their financial guru. GAF and carrier partners share educational content frequently. Simply share these posts from the social pages of these companies.

## WHAT NOT TO DO:

- Talk about specific products
- Alter the copy of the post you're sharing (unless given approval from your legal team)
- Make promissory statements



# CONTENT TOPICS - PERSONAL

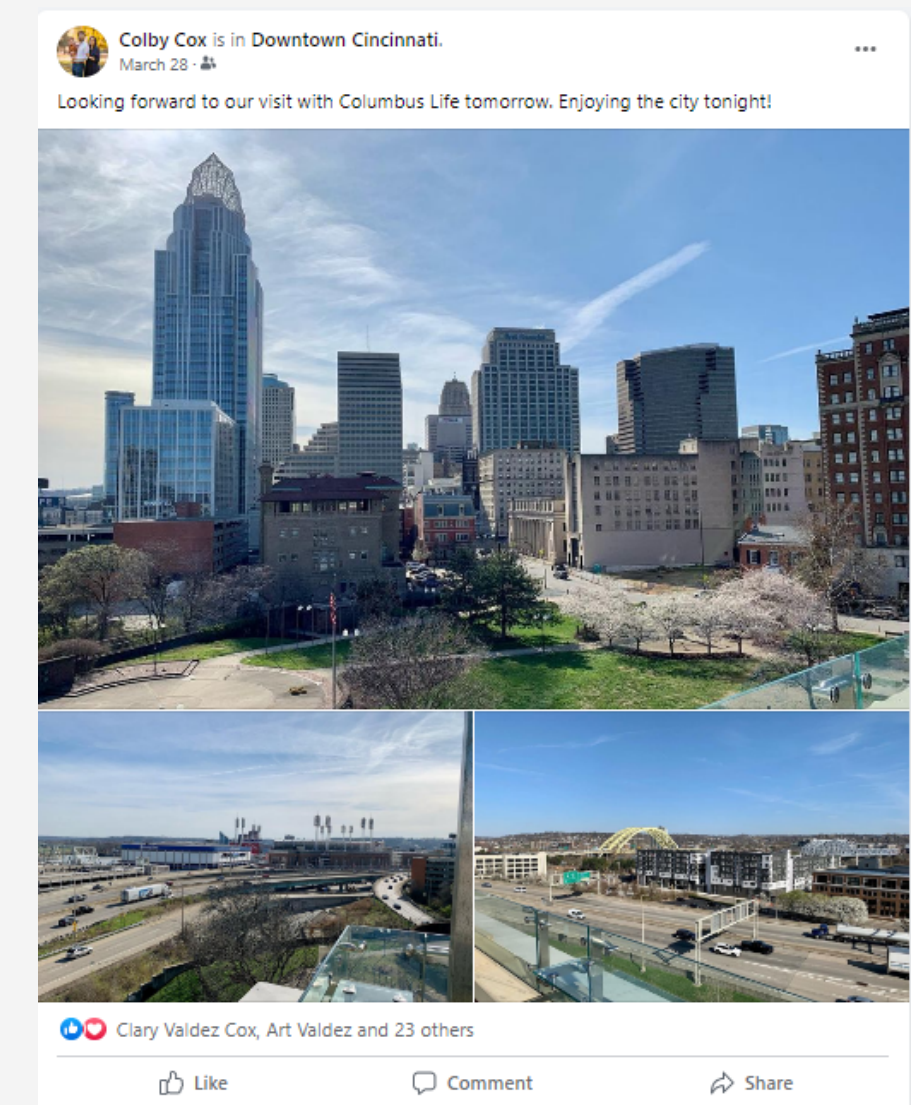
Social media is a place built around connection. If you don't show your human side, how do you expect your followers to connect with you? Don't share anything you're uncomfortable with, but don't be afraid to share family outings, personal goals, etc. Speak with your legal council to decide the best way to do this.

## WHAT NOT TO DO:

- Post in unprofessional settings (selfies at the gym)
- Post, or comment on other's posts, about religion, politics, or other controversial topics. Remember that your account may be officially affiliated with a broker dealer.



**QUICK TIP:** Make sure to make your content engaging by including a call-to-action. If it's a personal post, ask them a question. Ask a question or ask them to like the post if they enjoy hiking as well.



**QUICK TIP:** When posting about successes, make sure to use a photo in a professional setting. Avoid using actual sales numbers. Instead speak in a thankful, appreciative tone.





# ***TURNING COMMENTS INTO CONVERSATIONS***

THE ART OF COMMUNITY  
MANAGEMENT



# CONVERSATION MANAGEMENT

When your content begins to get engagement, the opportunities to create conversations will arise. These conversations can eventually lead to sales, so they must be taken advantage of. Below are examples of comments you may see:

## WARM LEADS

Jane Jefferson  
1m · 👤

If you are looking into life insurance you may not have thought about all the reasons why it is so valuable. Here is a helpful breakdown of why life insurance matters.

1. Protect your loved ones
2. Financial reassurance
3. Cover end-of-life expenses
4. Retire debt
5. Personal accumulation
6. Protect your business
7. Pay for college
8. Cash value accumulation
9. Estate planning
10. Charitable planning

Like Comment Share

**John Odde** This is really helpful!  
Like · Reply

## COLD LEADS

Jane Jefferson  
1m · 👤

If you are looking into life insurance you may not have thought about all the reasons why it is so valuable. Here is a helpful breakdown of why life insurance matters.

1. Protect your loved ones
2. Financial reassurance
3. Cover end-of-life expenses
4. Retire debt
5. Personal accumulation
6. Protect your business
7. Pay for college
8. Cash value accumulation
9. Estate planning
10. Charitable planning

Like Comment Share

**Tim Johnson** Kerry Johnson  
Like · Reply

## CLIENTS

Jane Jefferson  
1m · 👤

If you are looking into life insurance you may not have thought about all the reasons why it is so valuable. Here is a helpful breakdown of why life insurance matters.

1. Protect your loved ones
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3. Cover end-of-life expenses
4. Retire debt
5. Personal accumulation
6. Protect your business
7. Pay for college
8. Cash value accumulation
9. Estate planning
10. Charitable planning

Like Comment Share

**Kathy Hoeger** Thanks for sharing!  
Like · Reply

## ANGRY USERS

Jane Jefferson  
1m · 👤

If you are looking into life insurance you may not have thought about all the reasons why it is so valuable. Here is a helpful breakdown of why life insurance matters.

1. Protect your loved ones
2. Financial reassurance
3. Cover end-of-life expenses
4. Retire debt
5. Personal accumulation
6. Protect your business
7. Pay for college
8. Cash value accumulation
9. Estate planning
10. Charitable planning

Like Comment Share

**Steph Schmidt** Life insurance is a scam.  
Like · Reply



# CONVERSATION MANAGEMENT - WARM LEADS

Positive comments or messages coming in from non-clients is the ideal situation. Take advantage! Respond quickly and move the conversation to a private message. Once there, you can ask for their email or phone number to have the most descriptive, effective conversation.

## EXAMPLE



## EXAMPLE CONVERSATION



## KEEP IN MIND...

- Don't sell too hard. People don't want a sales-y agent, they want a neighbor who happens to be an expert.
- Take the conversation off social relatively quickly. Social media is public, and there are many things you can't legally discuss. Move the conversation to email or a phone call.



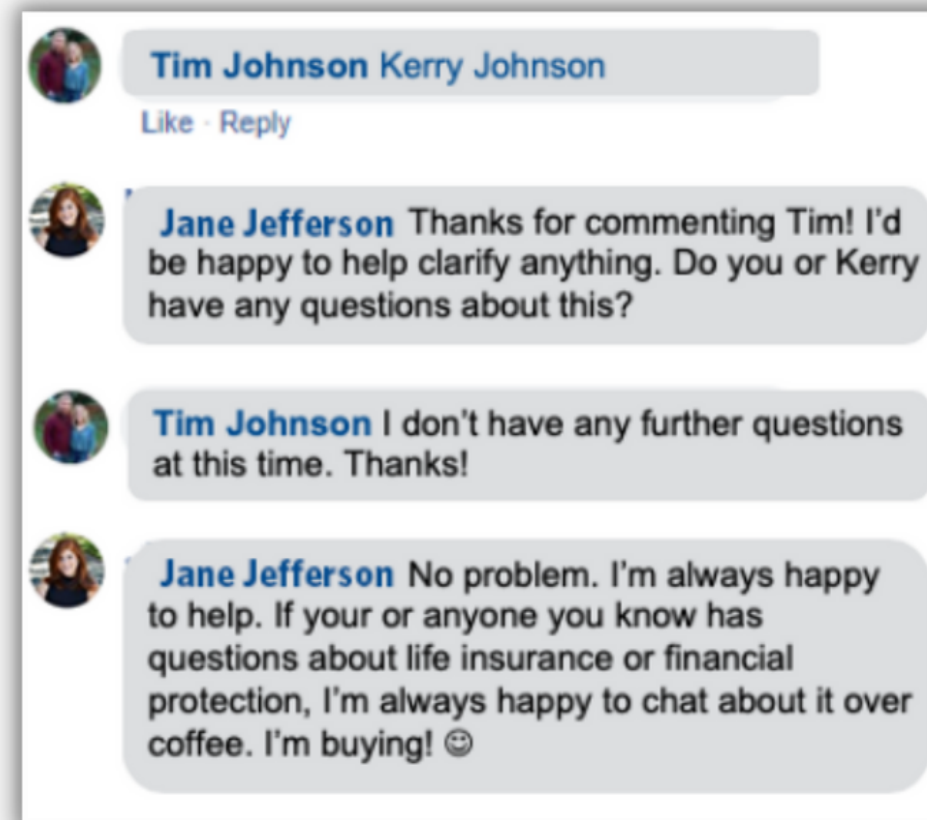
# CONVERSATION MANAGEMENT - COLD LEADS

More neutral comments from non-clients need to be addressed with care. Don't scare them away by pushing a sale too hard. Instead, make them feel seen and heard. If you'd like, let them know you'd love to buy them a coffee for a quick conversation.

## EXAMPLE



## EXAMPLE CONVERSATION



## KEEP IN MIND...

- Address their comment in a customized manner. Don't reply with a canned answer that ignores what they said in the first place.
- To stay professional, use proper grammar, limit emoji use, and don't abbreviate too much (thx, lol, etc.).
- Don't overly push. Simply let them know that you're here for them.



# CONVERSATION MANAGEMENT - CLIENTS

If your clients respond to you, make sure to create a conversation. By commenting, they're letting you know that they're open to a dialogue. Make sure that openness isn't met with a cold shoulder.

## EXAMPLE



## EXAMPLE CONVERSATION



## KEEP IN MIND...

- Create a conversation! They proactively reached out to you. Do your part and respond in a way that creates dialogue.
- Don't forget why they reached out. Having the conversation is what relationship building is all about, but make sure you address the fact that they commented on a specific piece of content.



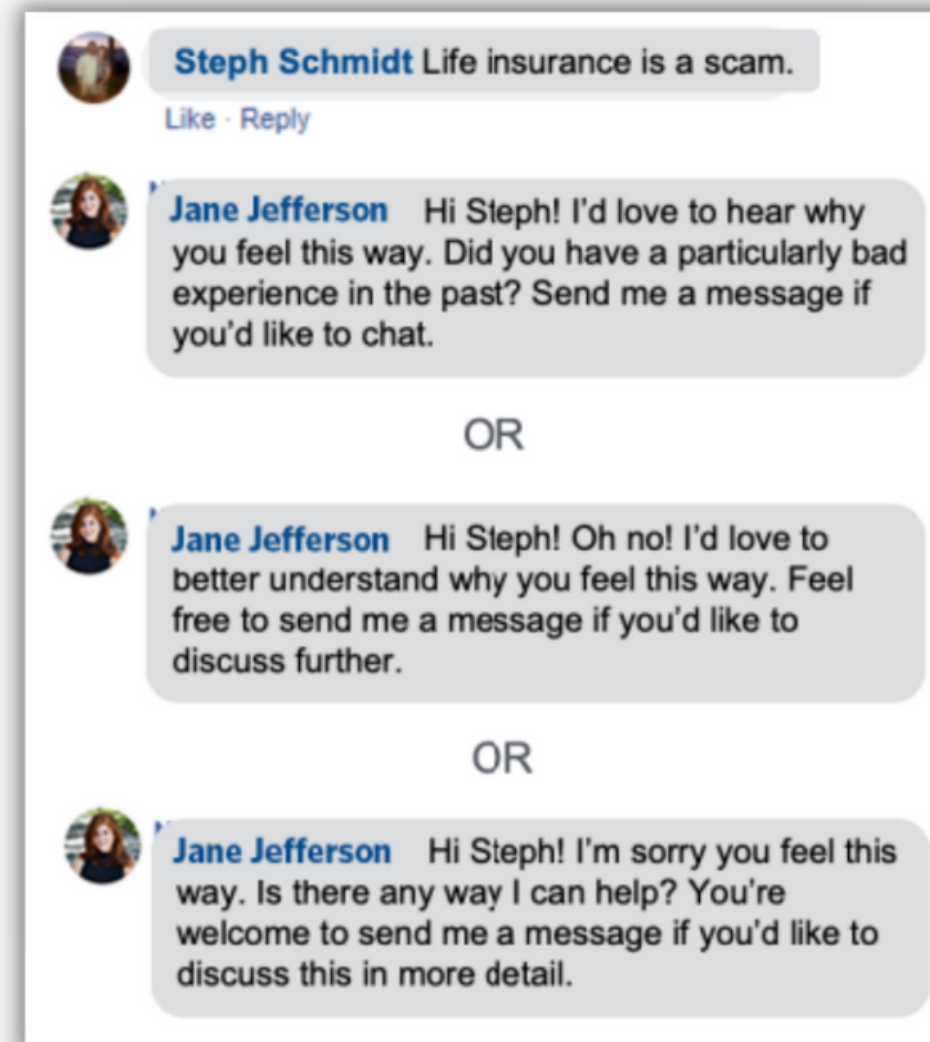
# CONVERSATION MANAGEMENT - **ANGRY USERS**

Unfortunately, human nature is to complain. You may encounter angry users (or trolls) commenting on your posts to vent about something. An internet troll is someone who makes intentionally rude or upsetting statements online to elicit emotional responses. Don't return the anger, and don't delete messages unless there is profanity. This is an opportunity to show your followers how you deal with pressure.

## EXAMPLE



## EXAMPLE CONVERSATION



## KEEP IN MIND...

- Take the high road. Every time. Be polite and respectful.
- Get the conversation to a private message. Don't give them an opportunity to continue publically commenting.
- If the user refuses to stop, you have the power to block that user from commenting on your page.
- Most importantly, please refer to your legal compliance guidelines regarding complaints.





# **INCREASING YOUR ENGAGEMENT**

ANALYTICS AND MEASUREMENT  
ON SOCIAL MEDIA





# MEASUREMENT

Using data and analytics to guide your business is a great way to be successful. While this section will only touch on some of the higher-level concepts, we will be providing a deeper dive into analytics in Facebook 301. Make sure to check that out.

## MAKE SURE YOUR TIME ISN'T WASTED

In marketing we use data to help us get better, more efficient. By looking at which messages our audiences reacted positively to, and which they didn't, we can begin to understand what they prefer. If you continue to use the same content, and that content isn't working, you're wasting your time.

## YOU DON'T NEED TO BE A MATHEMATICIAN

Don't worry. Looking at Facebook data isn't hard. It's fast and easy. You can easily learn which posts are working and which aren't. Then, simply continue doing the things that work!

Global America Financial Brokerage LLC  
Published by Canva · September 8 ·

September is Life Insurance Awareness Month. Make sure you have the right policy in place for you and your family. Sometimes, one second changes life forever.

Global America Financial

### Life Insurance Month

Sometimes One Second Changes Life Forever

www.globalamericafinancial.com

0:14 / 0:25

See insights and ads Boost post

You, Selena Fogg CPA and 1 other 3 Shares

Like Comment Share

Looking at some key numbers will help you understand what's working. Below is an example of a Facebook post, and some of the numbers you should keep track of.

### VIEWING YOUR ENGAGEMENT

To view the details of your post's engagement, click on either your reach or engagement metrics.

Post insights

September is Life Insurance Awareness Month. Make sure you have the right policy in place for you and your...  
Published by Canva · September 8 ·

Some insights are only available when the total is at least 100.

Post Impressions	Post reach	Post Engagement
297	260	20

**Interactions**

Like	Love	Wow	Sad	Angry	Other
8	1	0	0	0	0

Reactions 9

Comments 0

Shares 3

Other Clicks 2

Other

See Profile Insights Boost post

### POST REACTIONS

The number of like, love, laugh, wow, sad, or angry faces users gave the post.

### POST COMMENTS

The number of times a user provided their own thoughts to your post.

### POST SHARES

The number of times a user shared your post out to their personal community.

### POST REACH

The number of unique users who saw this post in their newsfeed.

### POST LINK CLICKS

The number of times a user clicked on your URL, if a URL link was included in the copy.





## POST TOPICS



Perhaps posts talking about a certain topic performed better. Did people love when you shared about your family outings? Or when you posted educational pieces?

## POST VISUALS



Visuals can make a huge difference on Facebook. Maybe the infographics you shared from GAF or carrier partners did well. Or maybe the videos you're making are your top posts.

## POST TIMING



Your followers might be more active at certain times of day. For example, your morning posts might do better than your afternoon posts because your followers are hard at work in the afternoon.

Once you feel comfortable looking at this data, try finding patterns in the posts with higher levels of engagement. There are a few things to look for:



# ***QUESTIONS?***

THAT CONCLUDES OUR FACEBOOK  
201 COURSE

If you'd like to learn more about  
Facebook, take our Facebook 301  
course.

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





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# THANK YOU

*Check out Facebook 301 for more!*

