



ADVANCED TACTICS &
ADVERTISING



FACEBOOK 301





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After going through this course, you'll know many of the available advanced social media marketing techniques on Facebook.

Advanced Organic Features

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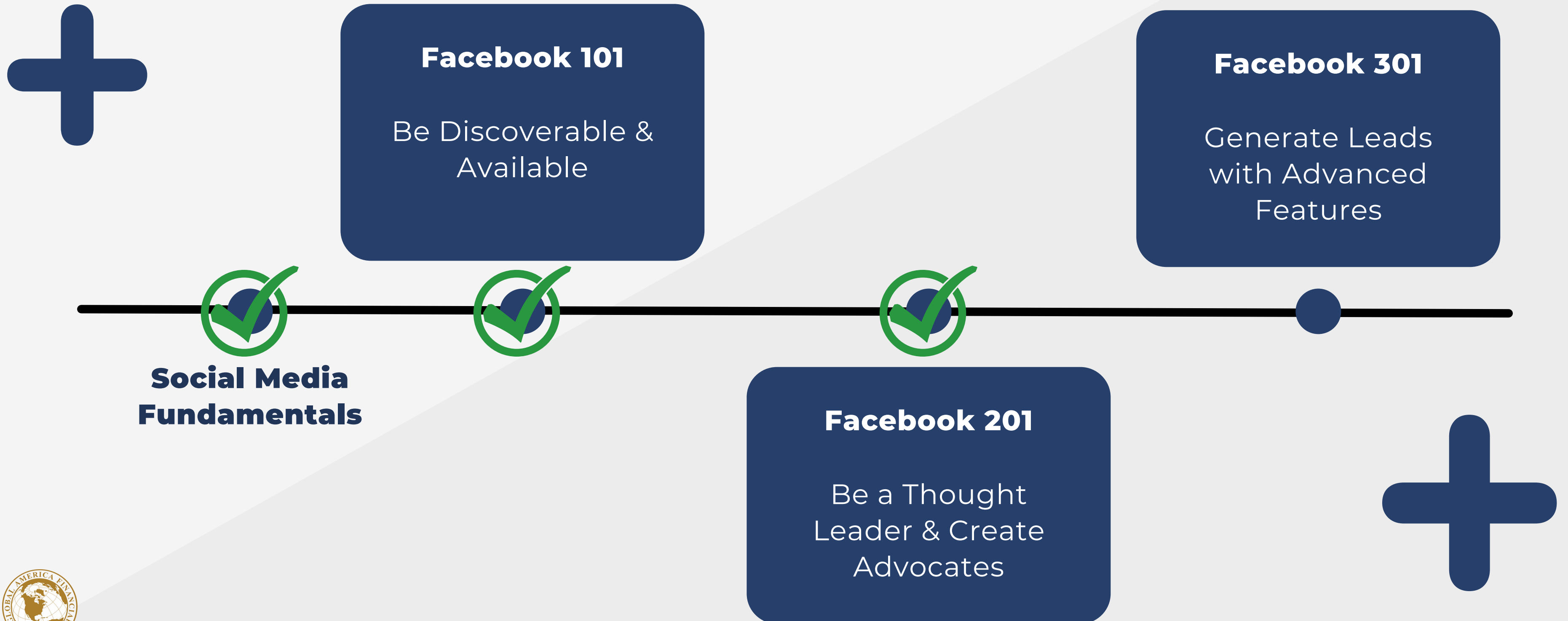
ADVANCED ORGANIC FEATURES

FACEBOOK EVENTS,
APPOINTMENTS, AND OFFERS



SOCIAL MEDIA GOALS

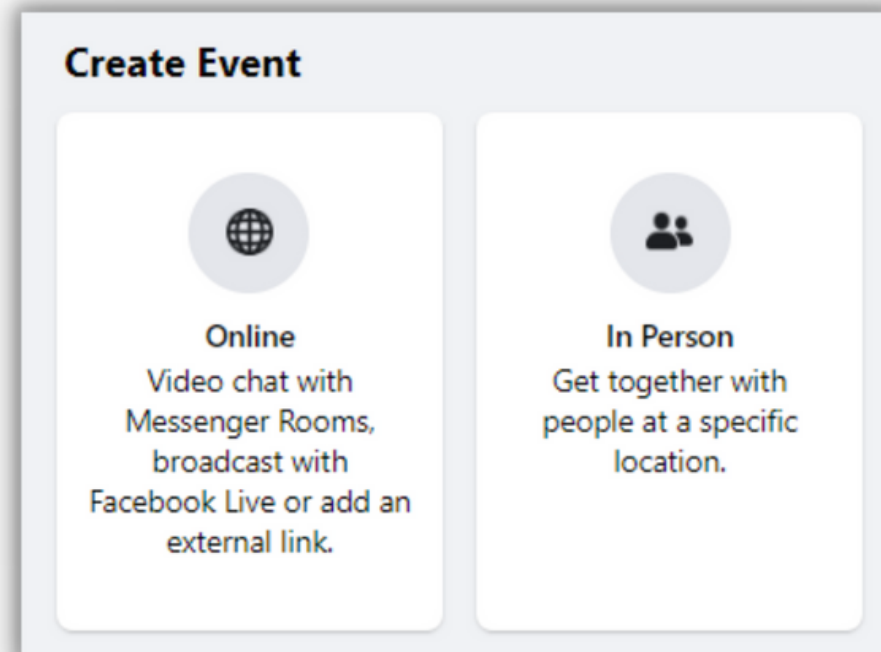
When considering social media's use in the financial services industry, there are three things we're trying to achieve. After going through our Fundamentals, Facebook 101, and Facebook 201 courses, you've become discoverable and available, and understand how to be a thought leader. Now, we can focus on using advanced tactics to potentially generate new leads.



ADVANCED FACEBOOK FEATURES

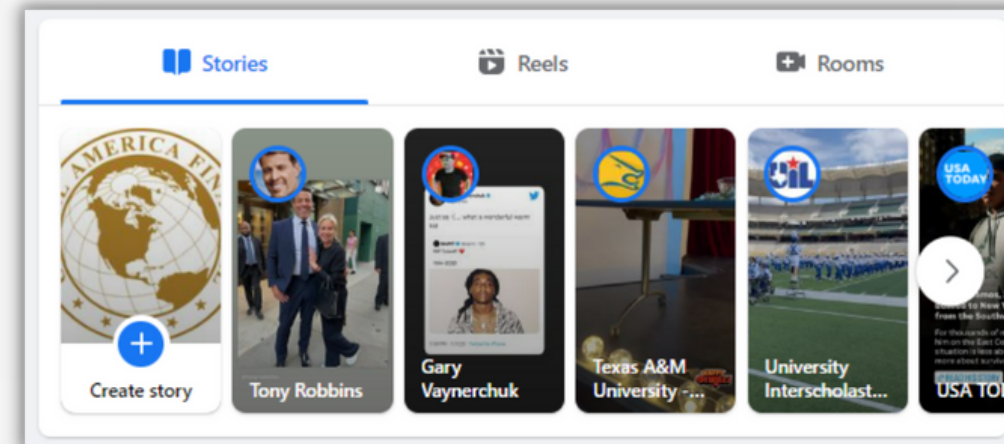
There are a lot of additional features offered to Facebook business pages. Below is our point of view on a few of the most popular ones:

FACEBOOK EVENTS



Whether you're putting on a free seminar or you're hosting a community event, Facebook Events is a great way to get the word out. We highly encourage the use of this feature.

FACEBOOK LIVE & STORIES



Stories can be used to supplement your content, but we don't recommend spending too much time on them. That said, please treat stories like any other piece of content. Create the story, receive appropriate approval, then post.

FACEBOOK REVIEWS



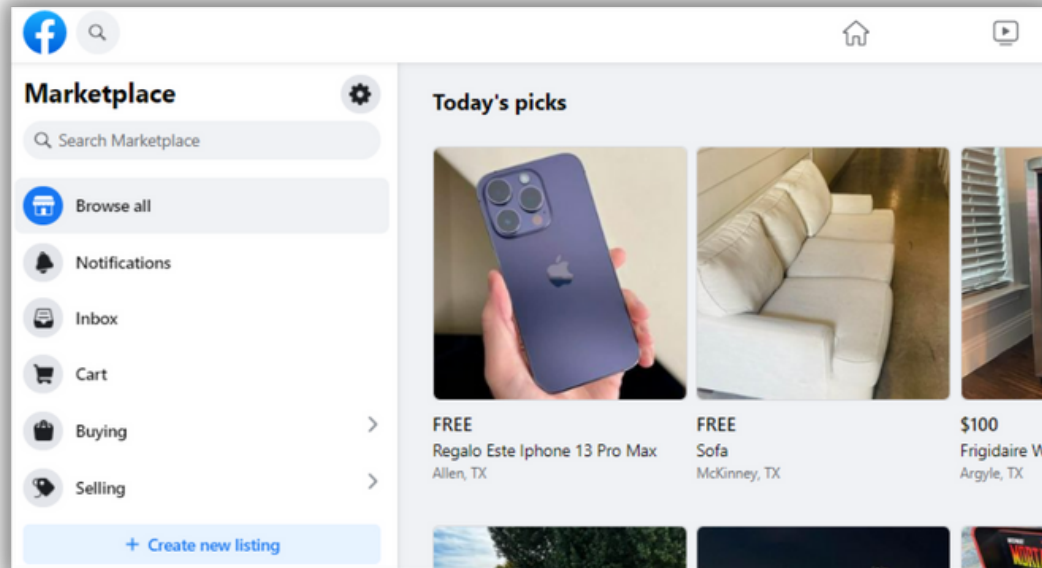
Reviews are an important part of having any social media page or digital presence. Customers search for companies online because they want to read reviews.

Be aware, legality comes into play here. If you are a FINRA-registered representative, endorsements are not allowed. Period. You should always make sure to adhere to your compliance policies regarding reviews.



There are a lot of additional features offered to Facebook business pages. Below is our point of view on a few of the most popular ones:

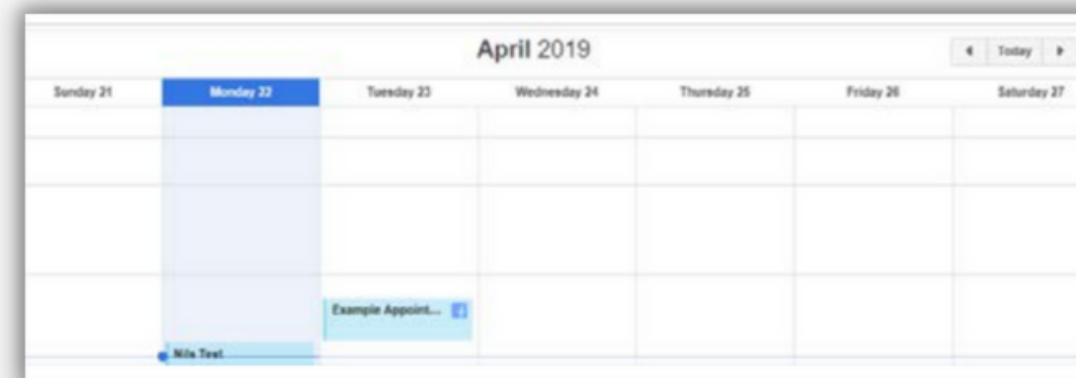
FACEBOOK MARKETPLACE



As a business, it's tempting to add a listing onto Facebook Marketplace. Fight the urge. Most people see Facebook Marketplace as the Craigslist or garage sale of Facebook.

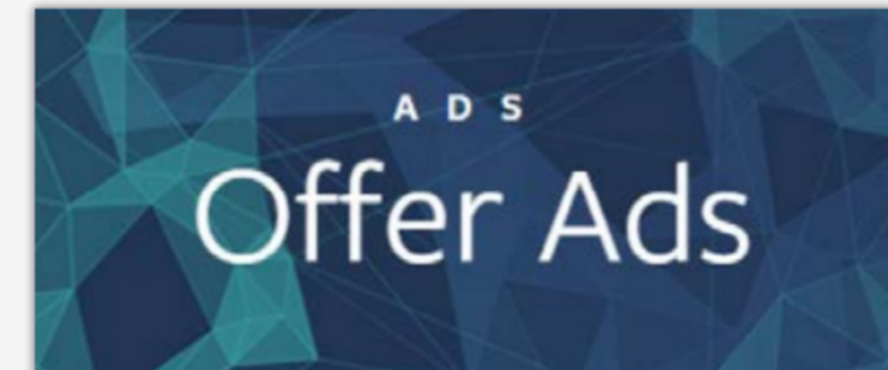
If the usage of Marketplace changes, we may change our recommendation. For now, though, we would stay away.

FACEBOOK APPOINTMENTS



Instead of asking visitors to your page to message you, you can ask them to book a meeting with you by syncing your Facebook page to your Google Calendar. This is an excellent opportunity, because it skips a step in the lead generation process. We highly encourage this.

FACEBOOK OFFERS




Though our business is not a retail business, Offer Ads have potential for success in the financial industry. Consider offering something like free initial consultations. If this is something you would like to do, posting an official offer on your page isn't a bad idea.

Let's take a look at the three advanced organic features we encourage using.



Events

Any date | Top | Classes | Friends | Following




NOV. 25 THRU JAN. 1
At Vitruvian Park® in Addison

HOLIDAY LIGHTS SPECTACULAR

5 AT 5 PM
Vitruvian Lights
Vitruvian Park
is interested

Interested

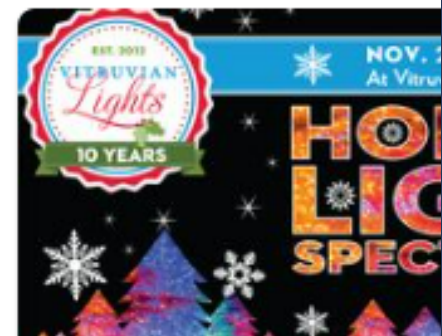


NOV. 25 THRU JAN. 1
AT VITRUVIAN PARK® IN ADDISON

HOLIDAY LIGHTS SPECTACULAR

SAT, NOV 26 AT 6 PM AND 21 MORE
Vitruvian Lights
Vitruvian Park
Jackie is interested

Interested




EST. 2012
VITRUVIAN Lights
10 YEARS

HOLIDAY LIGHTS SPECTACULAR

SAT, DEC 3 AT 6 PM
Vitruvian Lights Special
Vitruvian Park
3.4K interested · 259 going

Interested



FRISCO SQUARE

Christmas in The Square

for 18th, 2022 - January 3rd, 2023

- Light Show
- Horse Carriage Rides
- Story Time With Elsa, Anna, and Olaf
- Christmas Tree Lot

3 AT 6 PM
Christmas in The Square
are interested

Interested




PRESTONWOOD

CHRISTMAS TREE LIGHTING FESTIVAL

MON, NOV 21 AT 5:30 PM
Christmas Tree Lighting Festival -
Plano and Prosper
6801 W Park Blvd, Plano, TX 75093-638...
749 interested · 149 going

Interested



YOU'RE INVITED TO

Rockin' around THE REALM

5-8 PM Friday
DECEMBER 9TH

FRI, DEC 9 AT 4 PM
Rockin' Around The Realm
The Realm Castle Hills
Kristine is interested

Interested



Holiday in the Plaza



12 Wines of Christmas WINE WALK

FACEBOOK EVENTS



Using Facebook to attract your community to a particular event is a great way to reach new potential clients.

Facebook Events is one of their most popular features and is used by a wide variety of audiences. More importantly, you can “boost” your event by putting advertising dollars behind it to reach people in your local community.

This is an excellent way to meet new prospects and potentially generate new business. Whether you host a free educational class or sponsor a fundraiser, Facebook Events can be a powerful tool.

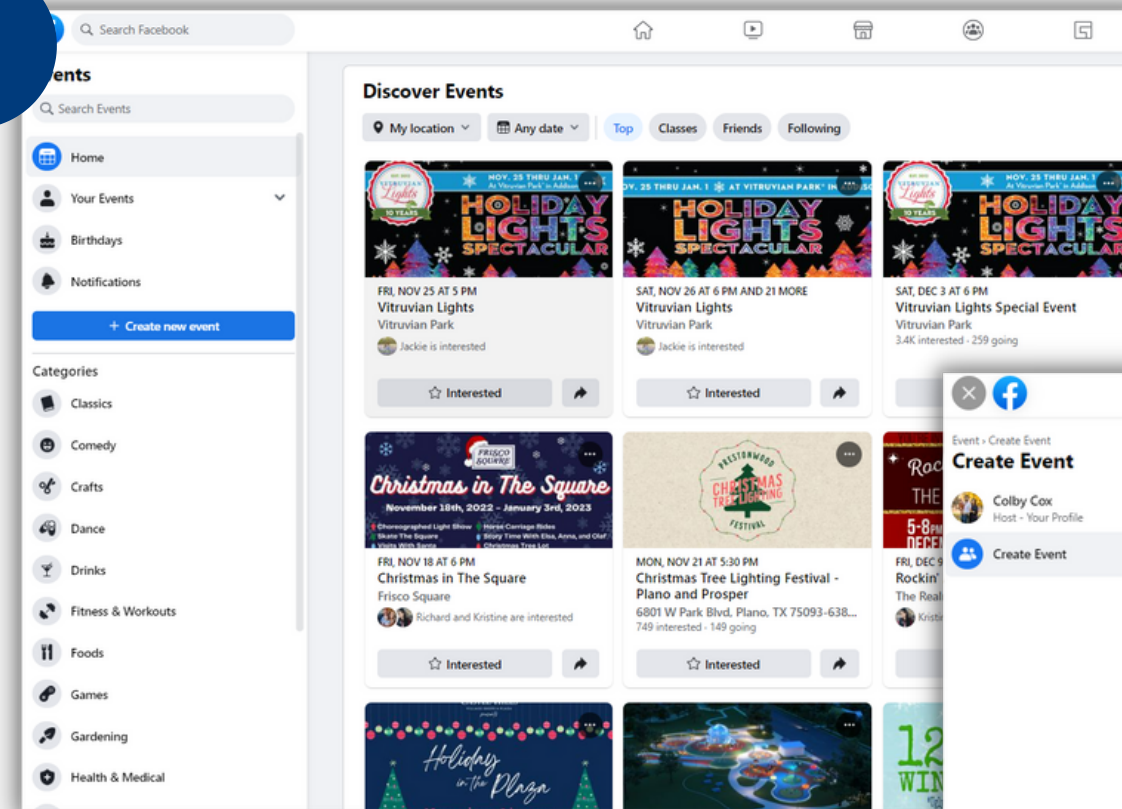


FACEBOOK EVENTS - SETUP

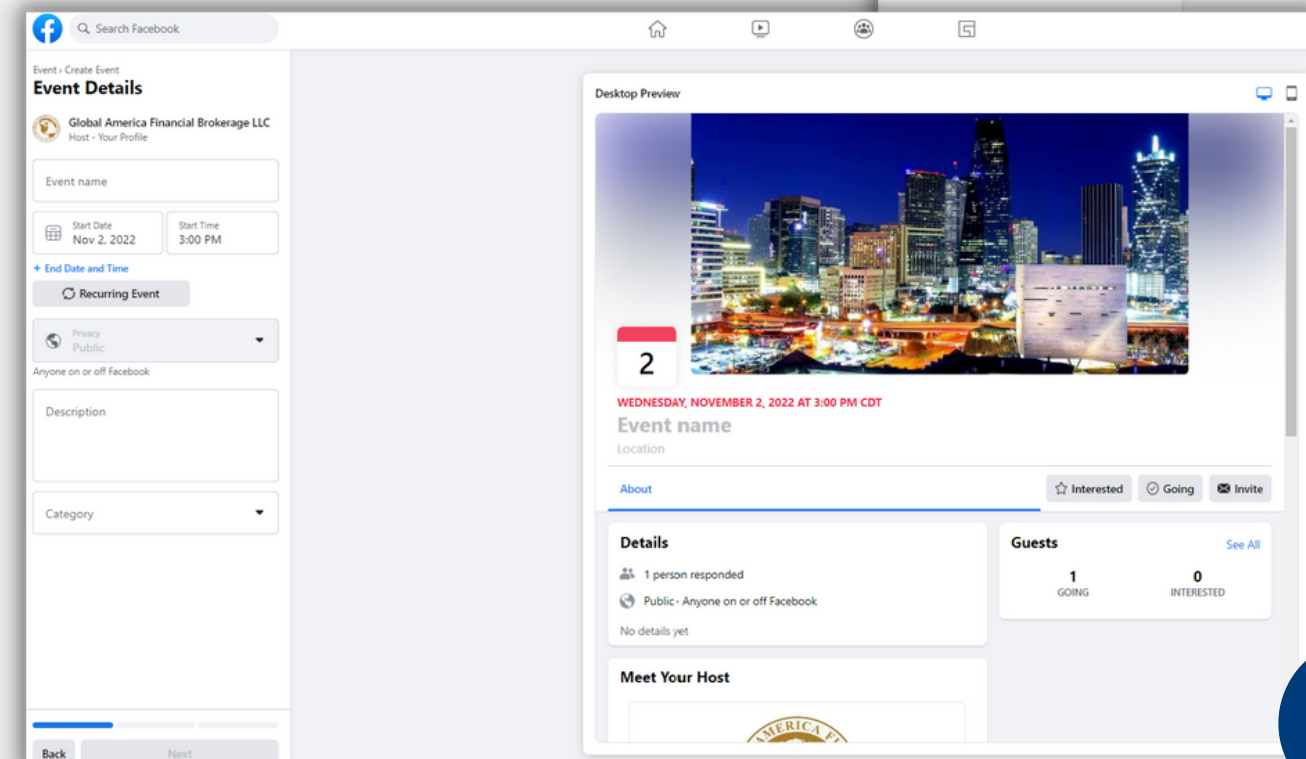
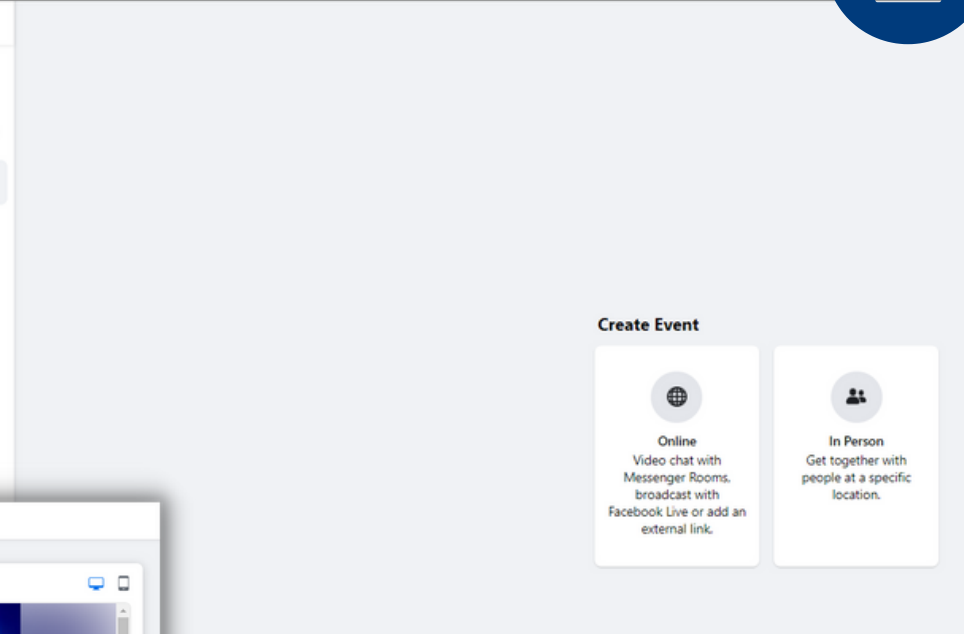
STEPS ON THIS PAGE

1. Log in to Facebook and click Events on the left-hand side.
2. Click the blue “Create Event” button and select “Create Public Event.”
3. Make sure to:
 - a. Select your Facebook Business page as the host.
 - b. Choose an eye-catching photo to use as your event photo.
 - c. Name your event something unique. For example, instead of naming it “Financial Clinic,” try calling it “Free Financial Clinic in Dallas, Texas.”

1



2



3

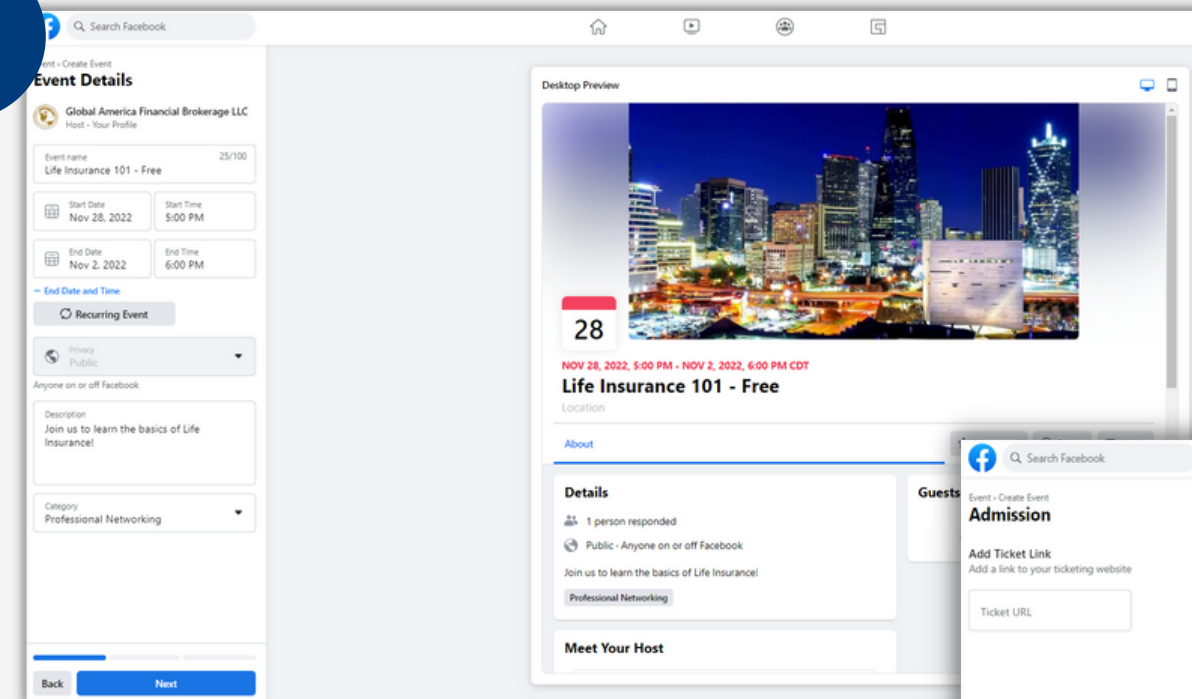


FACEBOOK EVENTS - SETUP

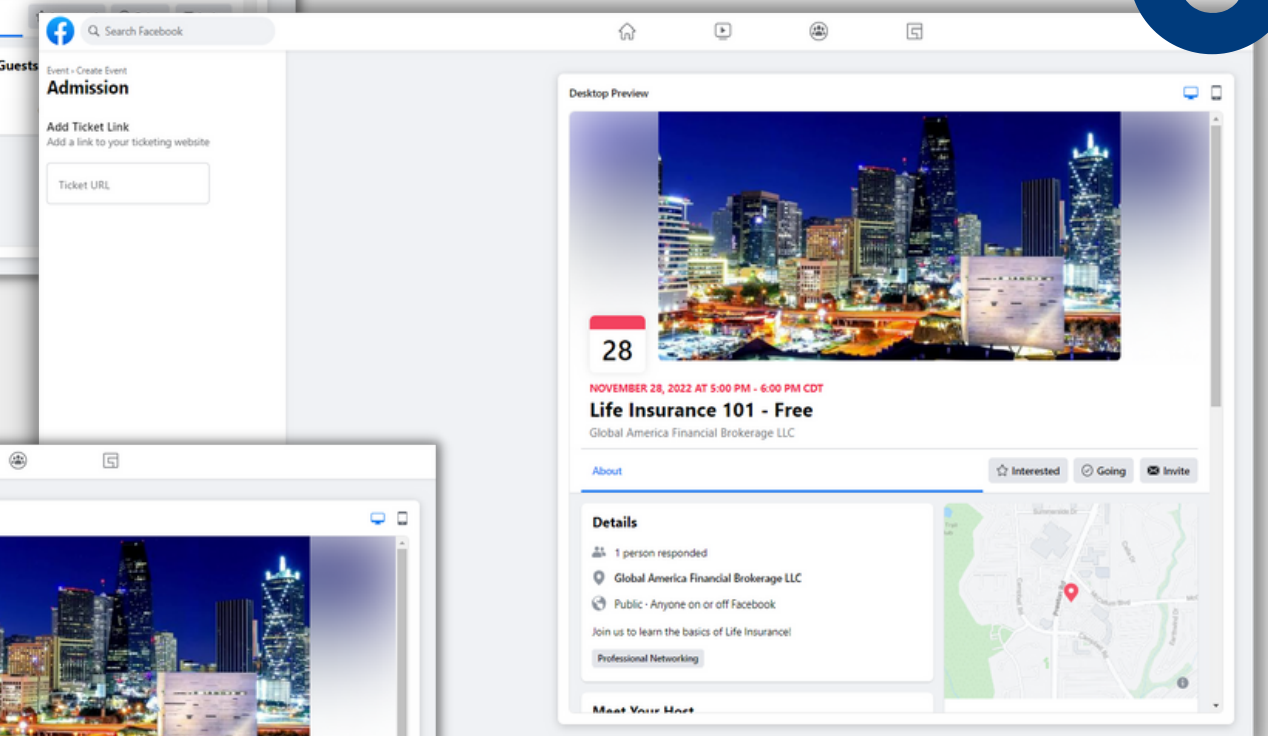
STEPS ON THIS PAGE

4. Provide a detailed description of your event, choose a category, frequency, and choose your date and time. We recommend choosing an end time to give attendees an idea of how long the event will last.
5. If your event requires tickets, Facebook makes that process quick and easy. If not, move on and select your post permissions. We recommend allowing anyone to post in your event, but make sure to require post approval first. That way if someone is spamming your page, you can deny the posts prior to them becoming public. Double-check all the information and click the blue “Create” button.
6. You’ll be taken to your new, shiny event page. Please submit your event to your compliance team the same way you would submit a piece of content. Once it’s approved, invite your Facebook friends! Click “Share Event” and choose which friends you’d like to share your event with. We also advise you to “boost” your event to reach more people. That process will be covered later in this presentation.

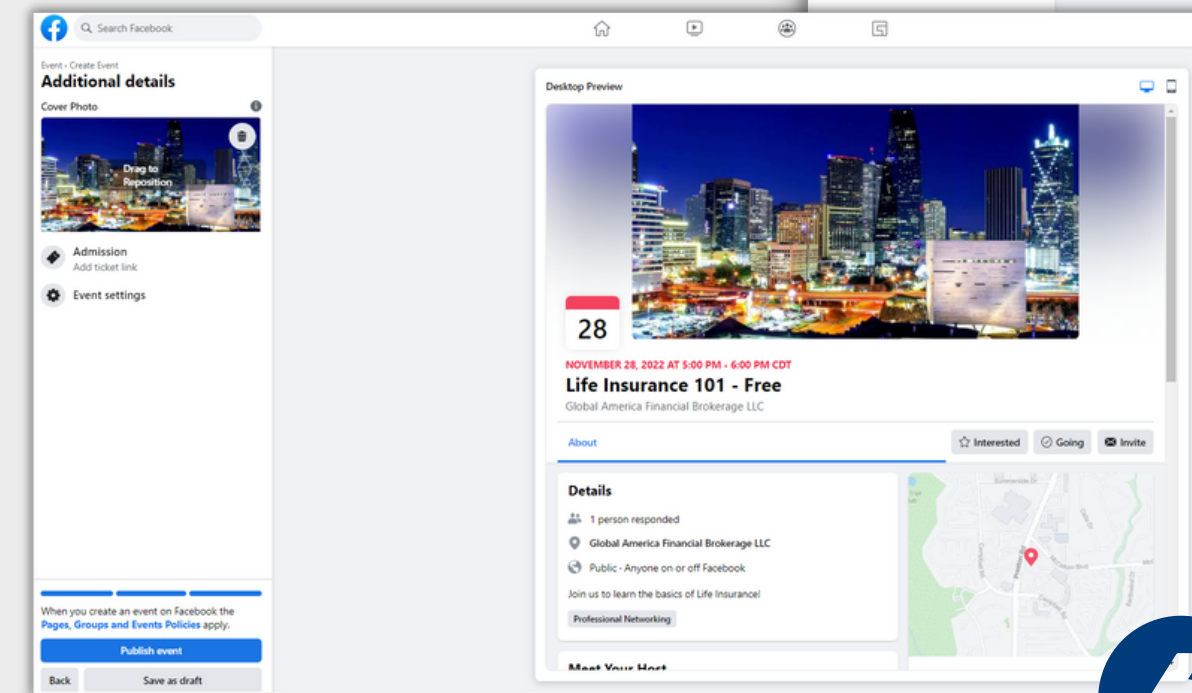
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5



6





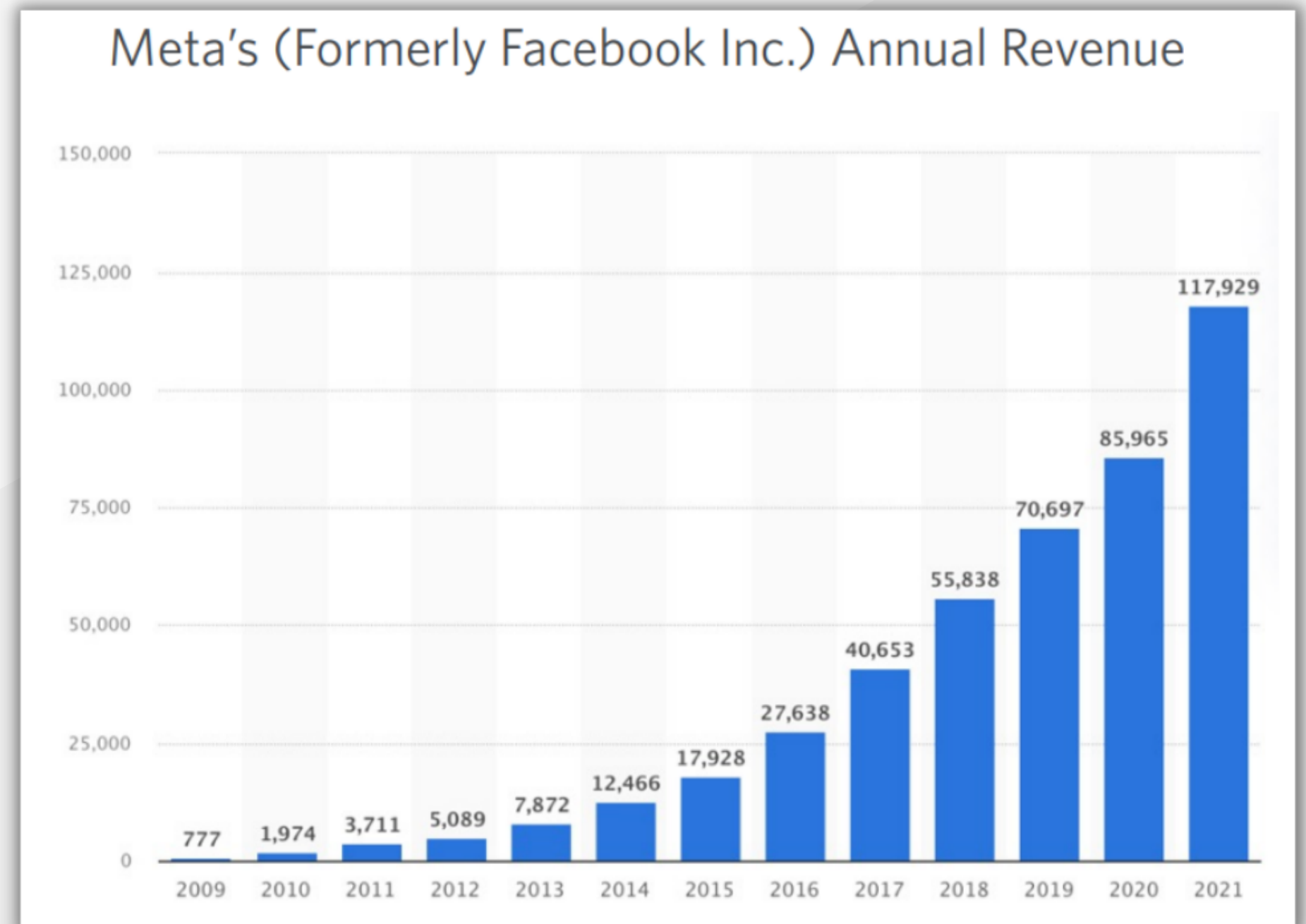
PAID ADVERTISING

BOOSTING AND
FACEBOOK ADS MANAGER



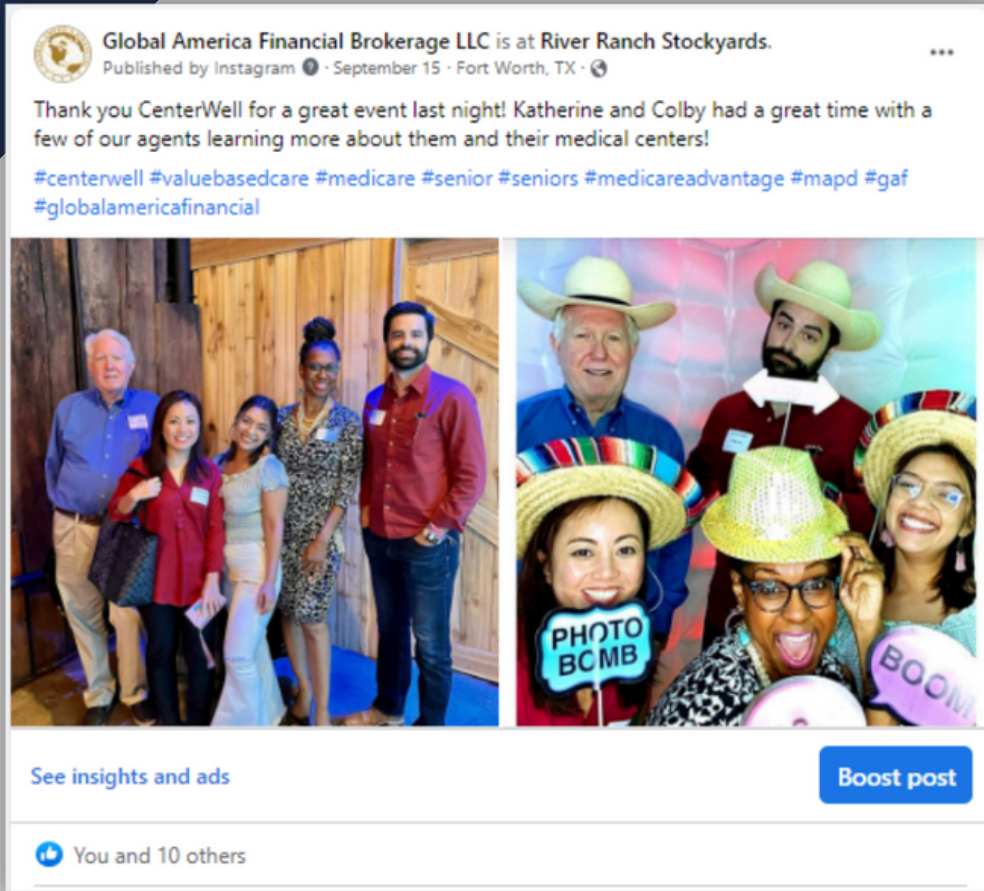
FACEBOOK ADS - BOOSTING

Over the years, Facebook has decided to limit the organic (free) exposure of business pages to its followers. When a business page published a piece of content in 2011, 26% of its followers would see that content in their newsfeeds. In the last decade those numbers



* <https://www.statista.com/statistics/268604/annual-revenue-of-facebook>





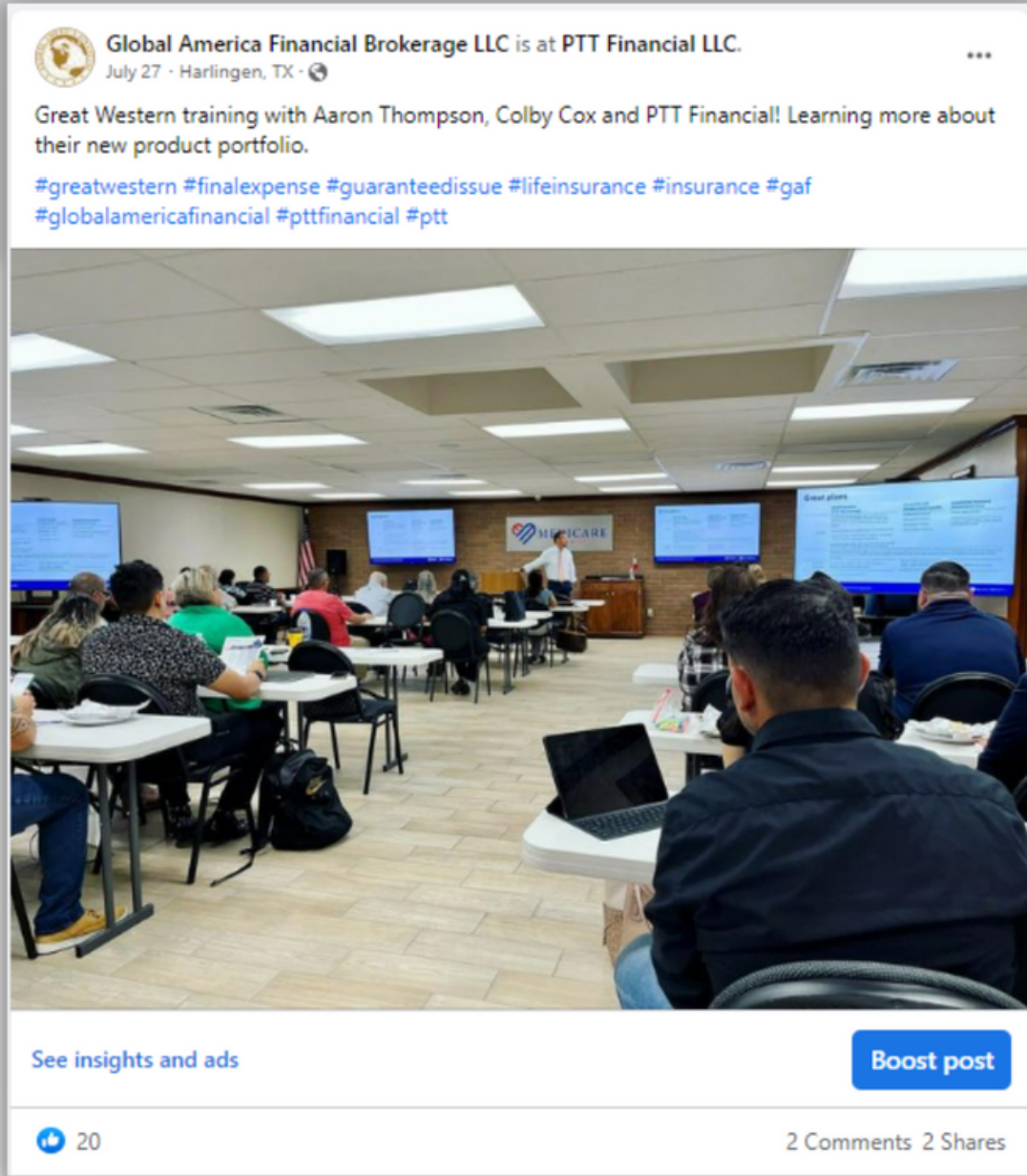
Boosting your posts is different than traditional advertising.

Instead of publishing new posts, you can boost posts — the act of putting advertising dollars behind posts you’ve already published.

Boosting is a preferred way of advertising for three reasons:

- 1. It’s easier on compliance as published posts have already been approved
- 2. Boosting is done through a simple widget versus the more complex Ads Manager tool.
- 3. It gives us the opportunity to let our followers tell us which posts to put our money behind. Simply find the posts with the most engagement and boost those.

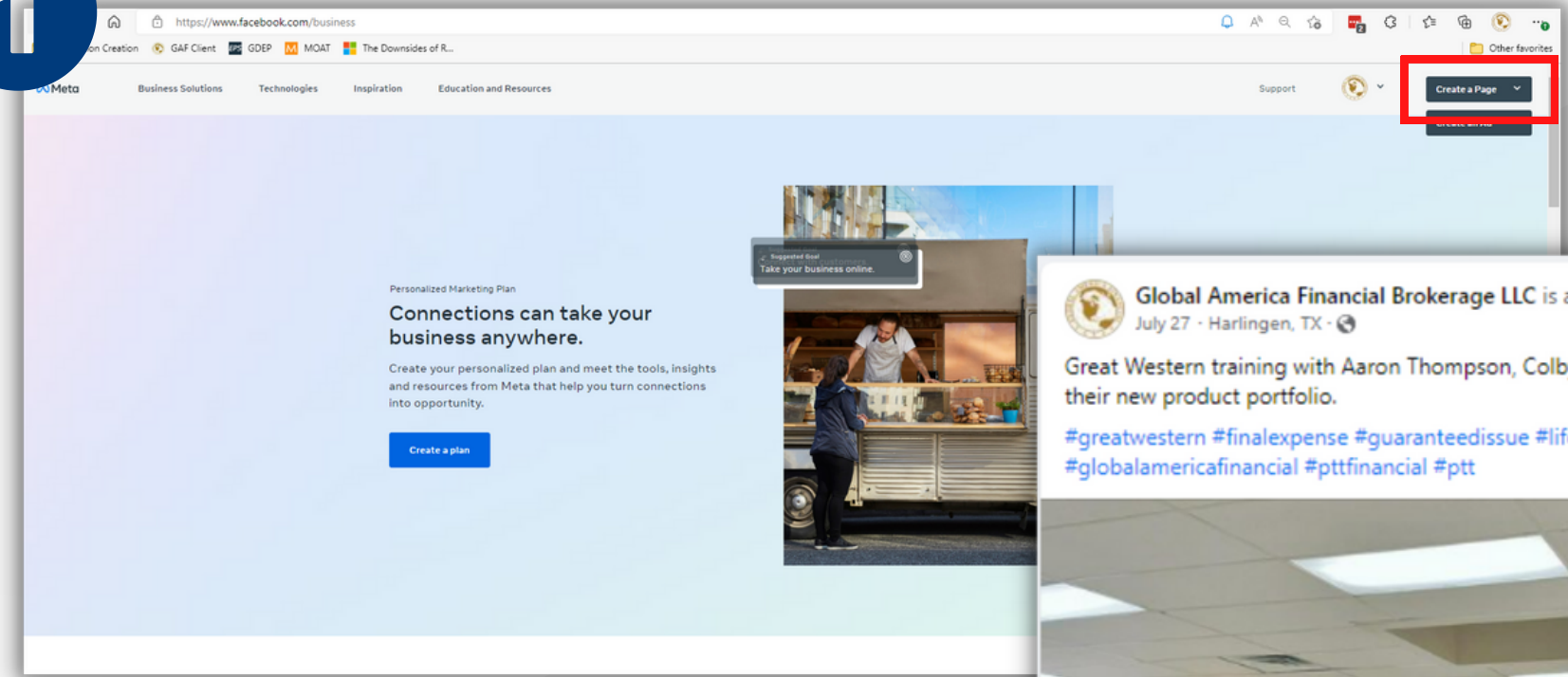
With 9 more likes, 2 more comments & 2 more shares, this is the post we should boost.



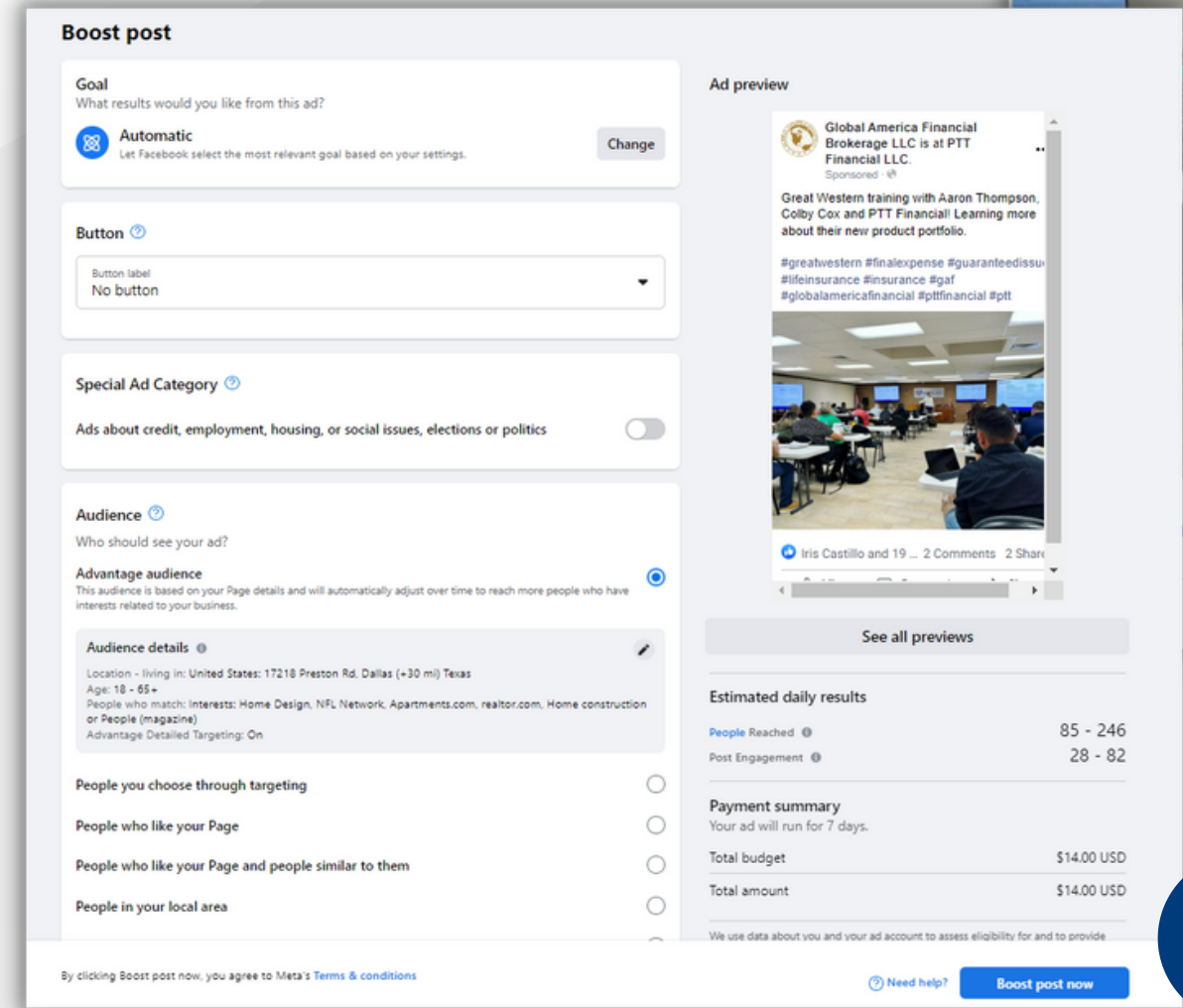
STEPS ON THIS PAGE

1. To boost a post, you need to setup a payment method. To do that, you have to set up a “Business Account.” A Facebook business account is different than your business page. This account gives you access to a wide variety of business tools — all of which can be applied to your business page. Go to business.facebook.com and click “Create Account.”
2. After your business account is created, go back to your Facebook business page and identify the post you’d like to boost. Then, click “Boost Post.”
3. You’ll see the boosting widget and all available options. Let’s go through those one-by-one.

1



2



3





Goal

What results would you like from this ad?

- Automatic**
Let Facebook select the most relevant goal based on your settings.
- Get more messages**
Show your ad to people who are likely to send you a message on Facebook, WhatsApp, or Instagram.
- Get more engagement**
Show your ad to people who are likely to react, comment and share.
- Get more leads**
Use a form to collect contact information from potential customers.
- Get more website visitors**
Show your ad to people who are likely to click on a URL in it.
- Get more calls**
Show your ad to people who are likely to call your business.

[Cancel](#) [Save](#)

Goal – Choosing a goal will tell Facebook who to prioritize when placing your ad in front of users within your defined audience who often engage with Facebook posts. If you choose “Messages,” Facebook will prioritize users who more often use Facebook Messenger. Think about what you would like to accomplish with your post and choose a goal accordingly.



Audience – This is the most important part of your ad. We recommend three options over the others:

1. “People you choose through targeting” will allow you to customize who you target based on geography, age, interests, and other demographic factors. This is a great audience to choose if you’re hoping to attract new customers in your local area.
2. “People who like your Page” will boost the post only to your page’s followers. This is a great one to use if you’ve already built up at least a few hundred followers and would like to foster your relationship with them.
3. “People who like your Page and people similar to them” will boost your post to people who like your page and people who are similar to those individuals. This is a nice option to use if you want your post to appear on others’ pages with similar interests.

Audience

Who should see your ad?

Advantage audience
This audience is based on your Page details and will automatically adjust over time to reach more people who have interests related to your business.

People you choose through targeting

Audience details

Location - living in: United States: Dallas (+10 mi) Texas
Age: 18 - 65+

People who like your Page

People who like your Page and people similar to them

People in your local area

See all

Create new

Automatic Placements – If left on, your ad will run on Facebook, Instagram, and other partner sites. By turning it off, your ad will only run on Facebook. If your target market is a bit older (45+), you may want to turn this off as Instagram skews younger, and is a bit more expensive.



Duration ⓘ

Days: 7 End date: Nov 9, 2022

Total Budget ⓘ

Estimated 124 - 358 people reached per day

\$ 20.00 ✎

\$1.00 ————— \$1,000.00

Duration and Budget – This is where you dictate how long your ad will run for and how much money you’ll put toward it. While \$5 a day would be sufficient, we recommend at least \$10 per day. Similarly, while two to three days would be a sufficient run time, we recommend between five and 10 days.

Payment – Make sure your newly created business account is selected here. Without that business account, Facebook won’t have any way to charge you and won’t run the ad.

Estimated daily results	
People Reached ⓘ	124 - 358
Post Engagement ⓘ	42 - 121
Payment summary	
Your ad will run for 7 days.	
Total budget	\$20.00 USD
Total amount	\$20.00 USD



FACEBOOK ADS - META BUSINESS SUITE

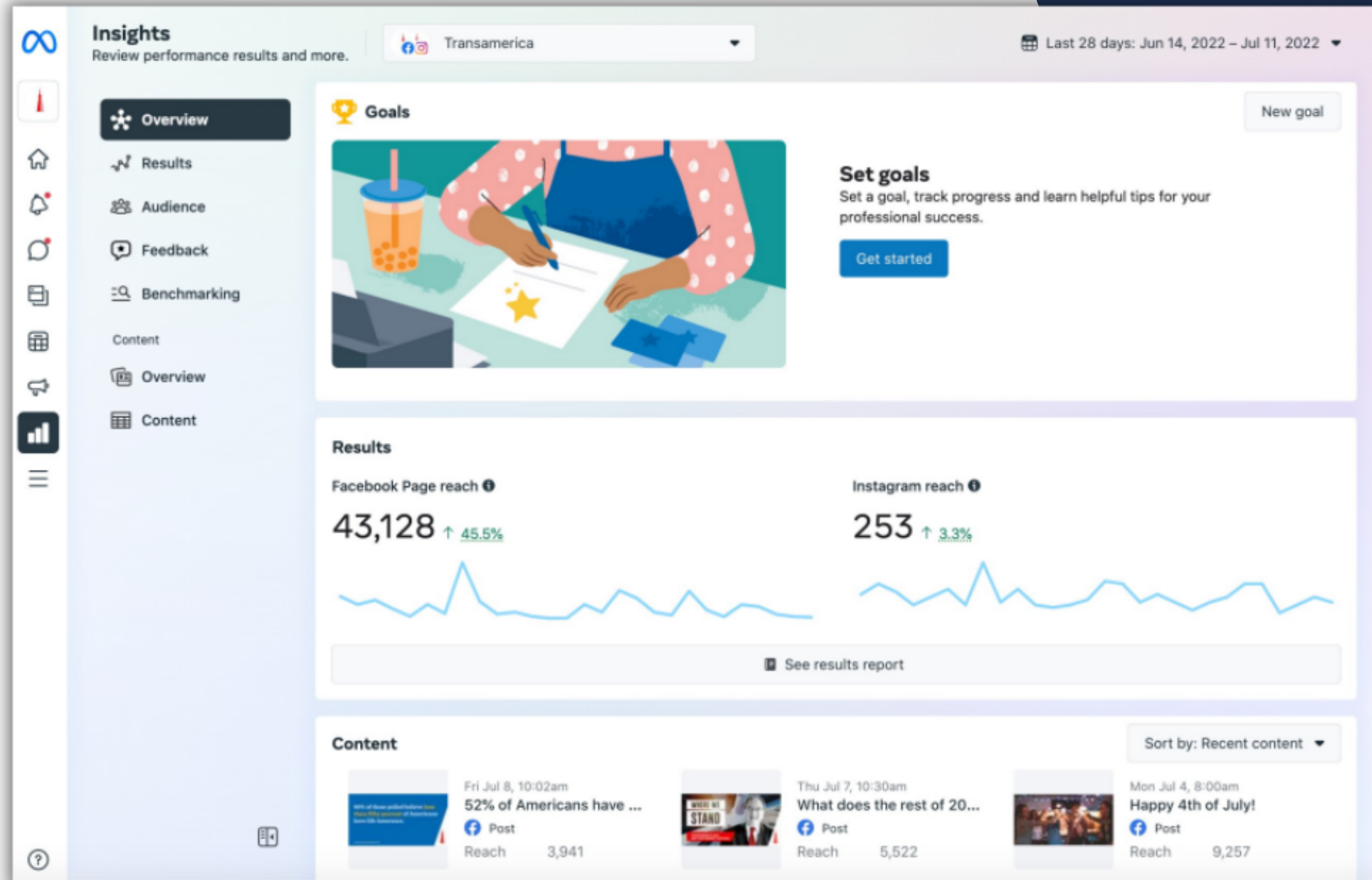
The screenshot displays the 'Posts & stories' management interface. On the left is a navigation sidebar with options like 'Posts', 'Stories', 'Feed & grid', 'Facebook Photos', 'A/B Tests', 'Mentions & tags', and 'Unlabelled content'. The main area shows a list of posts from similar businesses, filtered by 'Published' status. The list includes columns for 'Title', 'Date published', 'Reach', and 'Engagements'. Each row represents a post with a thumbnail, title, 'Boost post' button, and performance metrics.

Title	Date published	Reach	Engagements
52% of Americans have some form of L... Transamerica	Fri Jul 8, 11:02am	3.9K People reached	49 Post engagements
What does the rest of 2022 hold in sto... Transamerica	Thu Jul 7, 11:30am	5.5K People reached	43 Post engagements
Happy 4th of July! Transamerica	Mon Jul 4, 9:00am	9.3K People reached	294 Post engagements
Inflation, interest rates, and wild cards ... Transamerica	Fri Jul 1, 8:30am	5.5K People reached	47 Post engagements
Ending another great Pride Month by L... Transamerica	Thu Jun 30, 12:30...	3.9K People reached	363 Post engagements
Should you be concerned about your t... Transamerica	Thu Jun 30, 8:00am	7.6K People reached	122 Post engagements

If you'd like to run a full-fledged advertising campaign, you'll need to learn how to use Meta Business Suite.

While we highly recommend taking Facebook's Blueprint Certification courses, we will take the time in this section to discuss some high-level components of the platform.

Please keep in mind that all advertising pieces must be compliance-approved prior to launching a campaign.

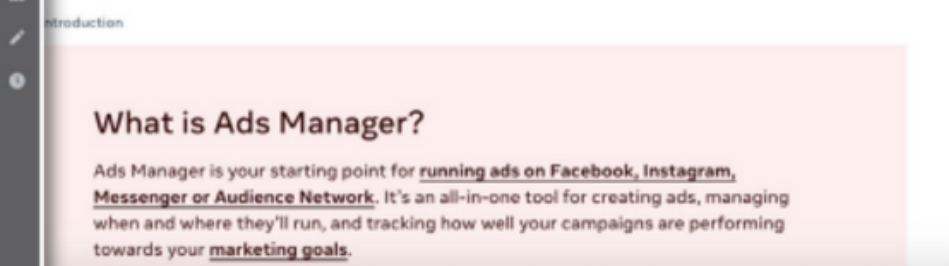
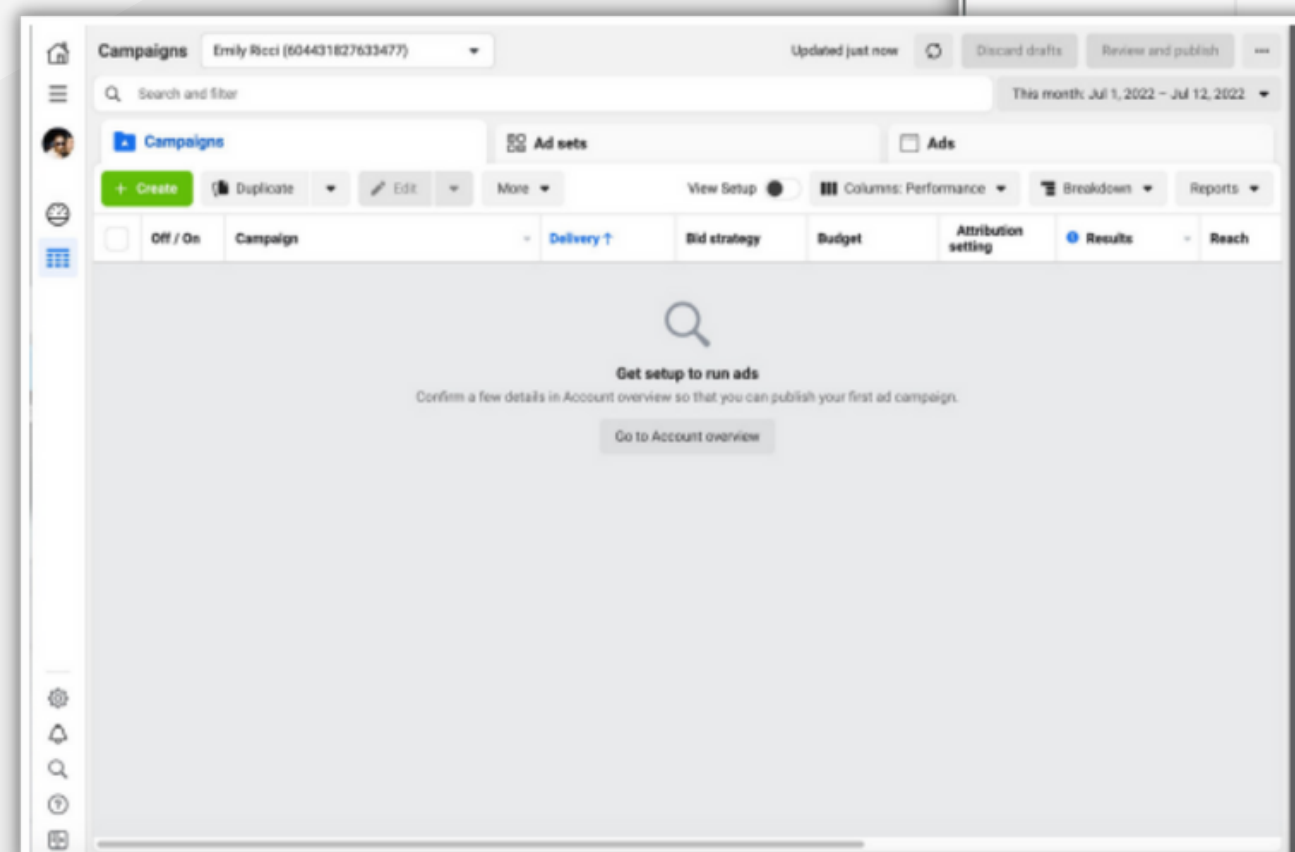
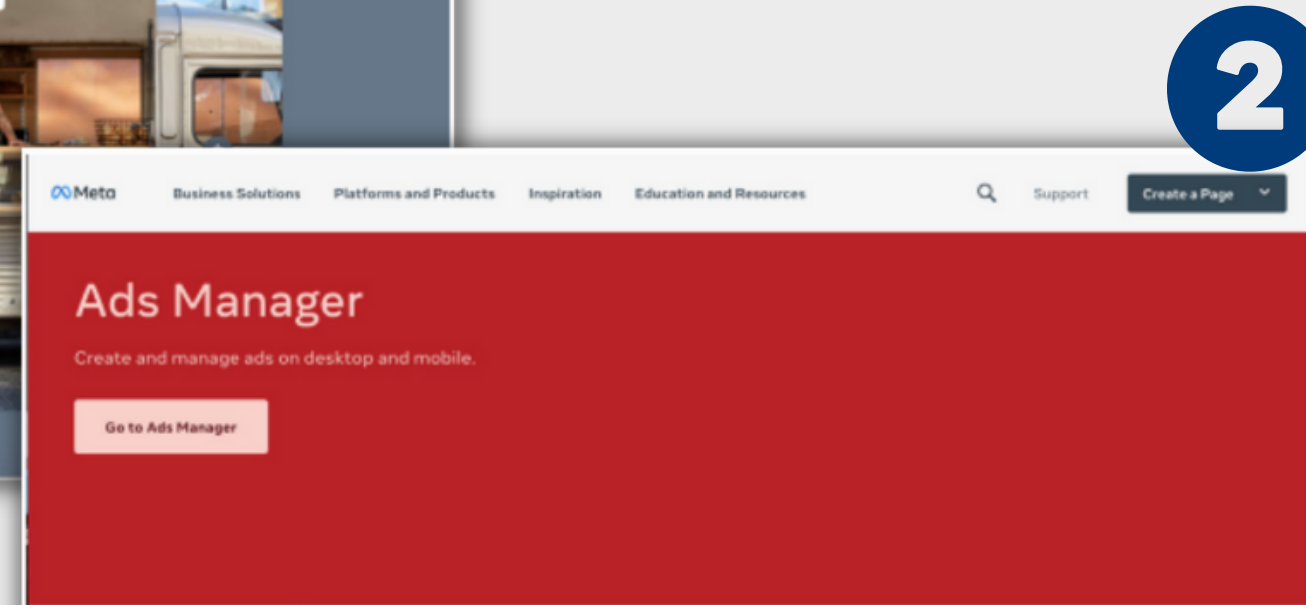
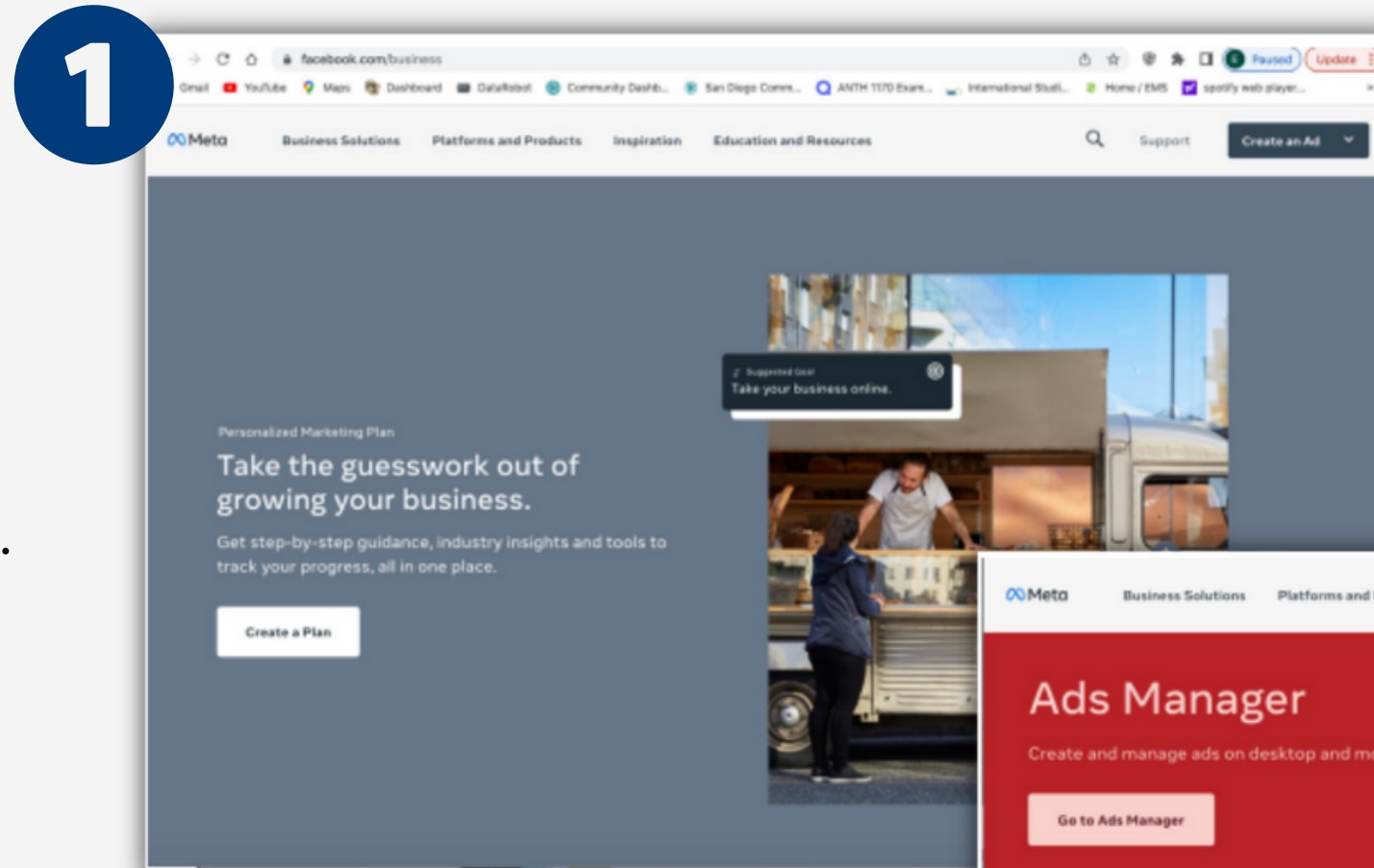


There are a few benefits to running a campaign through Ads Manager compared to simply boosting a post.

- You can send multiple pieces of content to a single audience to see which works better and apply your learnings to future campaigns.
- You can use email lists, retargeting pixels, and other advanced tactics to target very specific groups of people.
- You can use advanced analytics to understand how your campaign performed and learn more about your target audience.





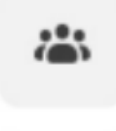

STEPS ON THIS PAGE

1. To begin advertising, you first must set up a business account. Go to business.facebook.com and click “Create Account.” Please note this is the same first step as boosting posts. If you already completed this step for that purpose, you don’t need to complete it again.
2. To create a campaign, go to facebook.com/business/tools/ads-manager and click on “Create an Ad” at the top.
3. You’ll be taken to the Ads Manager “Create New Campaign” screen. This is where you’ll design your campaign, including choosing your overall campaign objective and designing your individual ads





Choose a campaign objective

-  Awareness
-  Traffic
-  Engagement
-  Leads
-  App promotion
-  Sales

Your campaign objective is the business goal you hope to achieve by running your ads. Hover over each one for more information.

[Learn more](#) Cancel Continue

When choosing an objective for your Facebook campaign, think about how you want your money to be spent. Facebook uses campaign objectives to determine whether you value quantity versus quality, or something in-between.

Not only does each objective determine the type of user who will see your ad, and how/when your dollars will be spent, but some objectives offer unique features.

For example, awareness measures brand lift — an estimate of how many more users remember your brand compared to before.

Awareness	Show your ads to people who are most likely to remember them.
Traffic	Send people to a destination, like your website, app, or Facebook event.
Engagement	Get more messages, video views, post engagements, page likes
Leads	Collect leads for your business or brand.
App Promotion	Find new people to install your app and continue using it.
Sales	Find people likely to purchase your product or service.



Once you choose an objective, you need to create your audience(s). There are three types of audiences: Interests, Custom, and Lookalike.

Each reaches users in a unique way and offers potential value to any given campaign.

Campaigns are most effective when you choose more than one.

INTERESTS/DEMOS AUDIENCE

An audience based on a user's listed demographics or Facebook interests



CUSTOM AUDIENCE

An audience based on a list of emails, specific online activity, or engagement



LOOKALIKE AUDIENCE

An audience built by an algorithm using a custom audience as its base



When choosing a mix of audiences for your campaign, try to prospect (reach users for the first time) and retarget.

By choosing this kind of mix, Facebook will optimize to the higher performing audience, allowing you to more effectively reach your goals. Below are a few audiences we'd recommend:

INTERESTS/DEMOS AUDIENCE

An audience based on a user's listed demographics or Facebook interests

- Interests: Derived from FB pages the user likes
- Behaviors: Ranging from purchase behavior to life events
- Demographics: Ranging from age to age to parenthood job title



CUSTOM AUDIENCE

An audience based on a list of emails, specific online activity, or engagement

- Customer File: Your existing list of clients in Excel form
- Website Traffic: Users visiting your site
- App Activity: Users of your app
- Offline Activity: In-store or phone customers
- Engagement: Users engaged with your Facebook content



LOOKALIKE AUDIENCE

An audience built by an algorithm using a custom audience as its base






- A new audience based on any custom audience seen on the left



There are five types of Facebook ads:

1. Single Image
2. Single Video
3. Slideshow
4. Carousel
5. Collection






Each appeal to different users in unique ways, but all thrive when the content is high-quality. Never post a blurry visual.

1  Single Image Create up to 6 ads with one image each at no extra charge	2  Single Video Create an ad with one video	3  Slideshow Create a looping video ad with up to 10 images	4  Carousel Create an ad with 2 or more scrollable images or videos	5  Collection Feature a collection of items that open into a fullscreen mobile experience. Learn more.
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When choosing an ad type for your campaign, the most important thing (again) is to create more than one.

Facebook will not only optimize to the higher performing ad, but you'll learn which ad types work best for future campaigns. We highly recommend starting with Single Image and Carousel ads.

<p>1</p>  <p>Single Image</p> <p>Create up to 6 ads with one image each at no extra charge</p>	<p>2</p>  <p>Single Video</p> <p>Create an ad with one video</p>	<p>3</p>  <p>Slideshow</p> <p>Create a looping video ad with up to 10 images</p>	<p>4</p>  <p>Carousel</p> <p>Create an ad with 2 or more scrollable images or videos</p>	<p>5</p>  <p>Collection</p> <p>Feature a collection of items that open into a fullscreen mobile experience. Learn more.</p>
<p>Single Image is the original ad unit, and can see strong success, but the image better be compelling.</p>	<p>Best for brand awareness, videos are prioritized by Facebook, but don't yield high click rates.</p>	<p>If you're unable to create high quality videos, this can be a good replacement. Success is varied, though.</p>	<p>Potentially the strongest current ad type, this is a great way to display multiple ideas/messages.</p>	<p>A newer way to display a variety of products, the first click won't take the user to a site, but will expand the visuals to full screen. As we are not an e-commerce industry, these are highly discouraged.</p>



Regardless of the campaign you decide to create, there are a few best practices we recommend. All campaigns should generally follow these four guidelines:

TAKE YOUR TIME

Don't hastily create a campaign. Give some real thought to your objective. Carefully and strategically create your audiences. And create the best ads possible.



USE MULTIPLE AUDIENCES

There's always an opportunity to learn how to best target a given audience. Try creating an audience based on interests and run it alongside an audience based off your email list. Give your campaign multiple ways to succeed.



USE MULTIPLE ADS

If you only run a single ad, Facebook has to put your entire budget behind it whether it's working or not. If you run multiple ads, Facebook will automatically optimize toward the more successful ones, making your campaign more efficient.



CHECK IN & OPTIMIZE

If you run your campaign with multiple audiences and multiple ads, you should check in on the campaign about halfway through. Then, turn off the lower performing audiences and ads. Now your campaign is fully optimized.



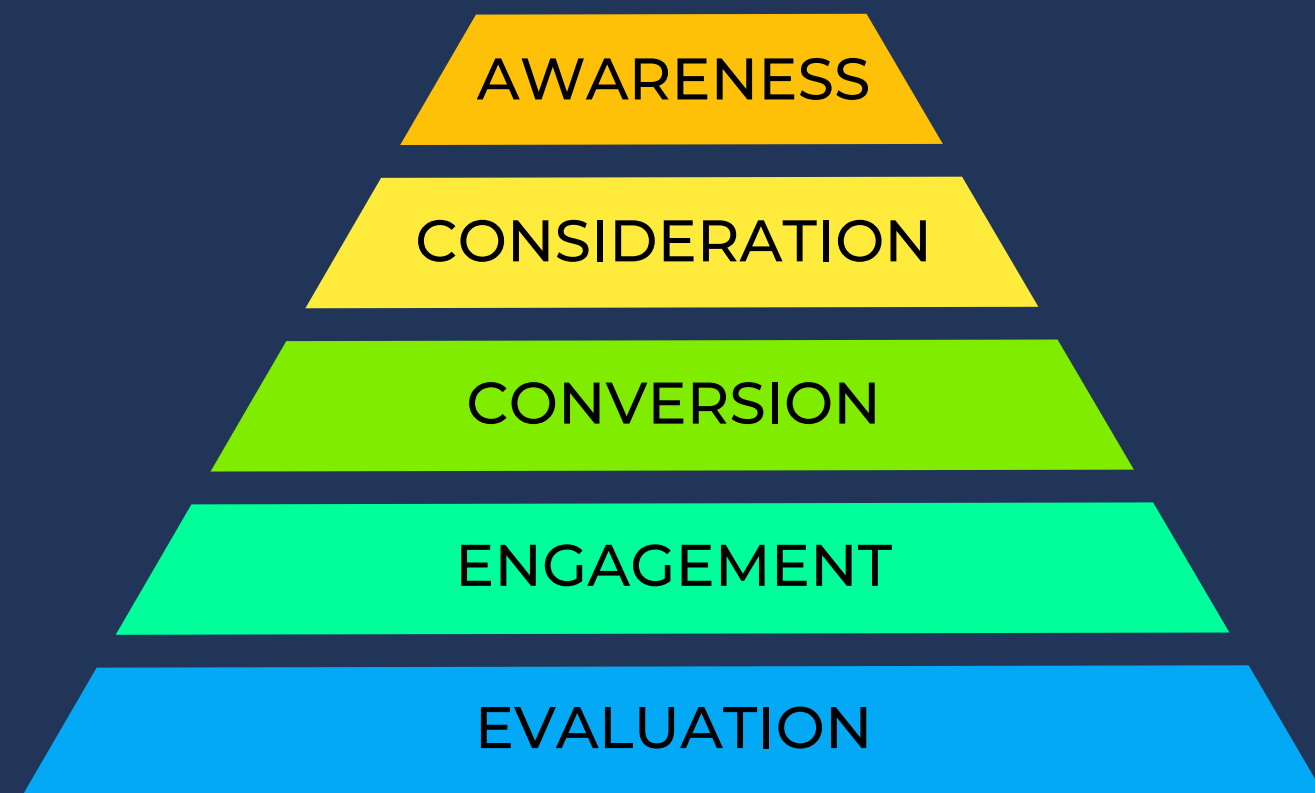


ANALYTICS

*USING DATA TO IMPROVE YOUR
MARKETING EFFORTS*



FACEBOOK ANALYTICS



To analyze (or optimize) your boosts and/or campaigns, you'll need to understand which metrics to watch. Depending on the goal of your campaign, there are different metrics you should keep an eye on.

Generally, Facebook metrics can be categorized into segments of the traditional marketing funnel. First, a user needs to be aware of your company, then they have the opportunity to engage, consider, evaluate, and finally convert. Let's break down what this looks like when we consider Facebook's metrics.



There are some key metrics to look at for each part of the funnel. Below is a list of those metrics with their associated definitions.

AWARENESS

CPM: Average cost to serve one thousand impressions
Reach: Number of unique Facebook users who were served your ad
Frequency: Average number of times a unique Facebook user has seen your ad

CONSIDERATION

Link Clicks: Number of times a user clicked on a URL bringing them off Facebook
CPC (cost per click): Average cost to obtain a single click
CTR (click through rate): Number of link clicks divided by total impressions

CONVERSION

New Leads: Leads obtained during a Lead Generation campaign
New Clients: Make sure to ask your new clients how they first heard about you, and how they ended up connecting with you. Then, track that information over time.

ENGAGEMENT

Reactions: Number of reactions (likes) a post received
Shares: Number of shares a post received

EVALUATION

Average Session Duration: A Google Analytics metric measuring the average length of time a user stayed on your website
Average Pages/Session: A Google Analytics metric measuring the average number of pages a user visited after clicking to your website



To make things a bit easier, we have broken down which metrics to observe if you were to run any of the three campaigns we recommended earlier in this course:

BRAND AWARENESS CAMPAIGN

CPM: This should be your most important metric here. If you run a Brand Awareness campaign, you should try to obtain the lowest CPM possible in order to reach the most people with your budget.

Reach: Keep track of this to understand how many individual people saw your ad.

Frequency: For a Brand Awareness campaign, you can let your frequency reach up to 12.0. If it gets any higher, you may want to take away some of your budget.

Ad Recall Lift: This is a Facebook estimate giving you an idea of how much it cost to have a single user remember your ad.



TRAFFIC CAMPAIGN

CPM: Higher CPM means it's more expensive to reach a certain group of people. Keep an eye on this.

Link Clicks: Keep track of how many clicks you sent to your website. What value is your campaign bringing?

CPC (cost per click): If certain ads have a higher CPC, it's possible they aren't as effective as others.

CTR (click through rate): By combining this metric with CPC, you should be able to determine how effective each ad is.



LEAD GENERATION CAMPAIGN

CPM: Higher CPM means it's more expensive to reach a certain group of people. Keep an eye on this.

Leads: How many people completed your lead generation form? By looking at this metric at the "Ads" level, you'll find a link to download your generated leads.

Cost Per Lead: This is a metric dividing total leads by total money spent on that advertisement. If a particular ad has a higher cost per lead, it may be wise to turn that ad off to allow your budget to shift toward the ad with a lower cost per lead.





QUESTIONS?

THAT CONCLUDES OUR
FACEBOOK 301 COURSE

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





THANK YOU

