

SOCIAL MEDIA UNIVERSITY: FACEBOOK 201

TAKING THE NEXT STEP IN YOUR FACEBOOK USE



TRANSAMERICA®

TODAY'S PRESENTATION

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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A photograph of two men in an office environment. The man on the left is smiling broadly, wearing a grey blazer over a blue checkered shirt. The man on the right is seen from the back, wearing a light blue shirt and glasses. They are shaking hands. The background is a blurred office space with windows and doors.

BE 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 & Available. Now, we need to focus on content to become a thought leader.



BE DISCOVERABLE AND AVAILABLE

Generate authority and become a searchable, verifiable business



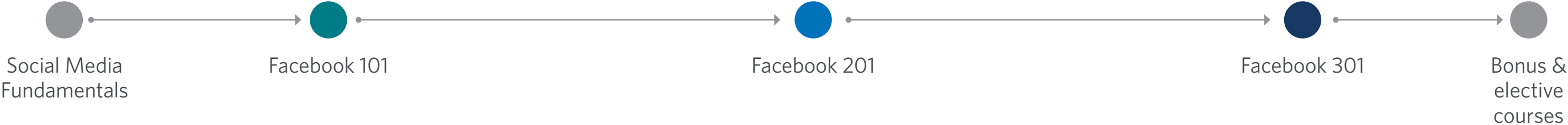
BE A THOUGHT LEADER AND CREATE ADVOCATES

Post content to build strong relationships with existing clients



GENERATE LEADS WITH ADVANCED FEATURES

Advertise to attract potential clients and recruits



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...



**BE USEFUL,
BE ENTERTAINING,
OR BE IGNORED**

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 Transamerica 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 Transamerica, Transamerica Agency Network, and Transamerica Financial Advisors, Inc. Facebook pages. All of that content is already 100% 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:



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.



COMMUNITY CONTENT

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

CONTENT TOPICS – EDUCATIONAL

Insurance and finance are complicated topics. By educating your clients, you're not just their agent, you're their financial guru. Transamerica shares educational content frequently. Simply share these posts from the social pages of Transamerica, TAN, or TFA – or from our Knowledge Place blog.

EXAMPLES:

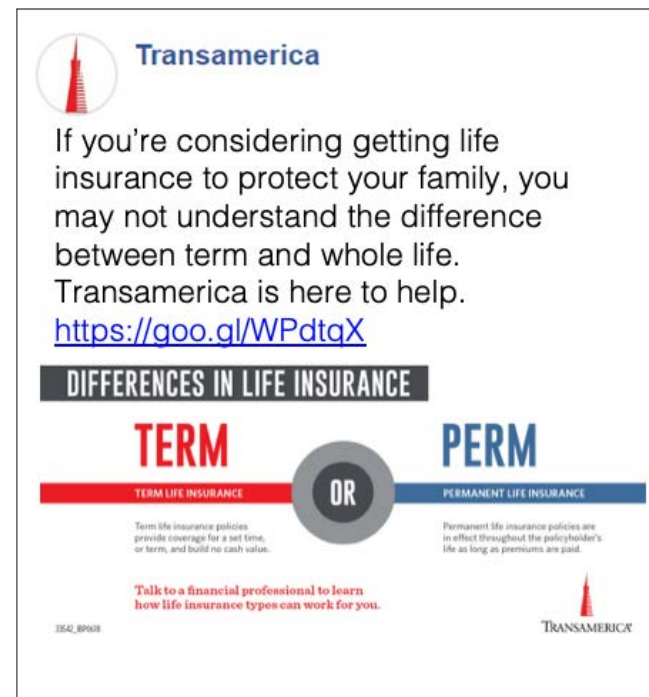


Transamerica Agency Network

Have you thought about your ability to live independently down the road? It's another major aspect of longevity's impact on retirement. Learn more here: <https://goo.gl/NzDGKZ>

About 1 in 7 U.S. adults provide unpaid care of some kind to another adult.

— "Adult caregiving often seen as very meaningful by those who do it," Pew Research Center, November 2016.



Transamerica

If you're considering getting life insurance to protect your family, you may not understand the difference between term and whole life. Transamerica is here to help. <https://goo.gl/WPdtqX>

DIFFERENCES IN LIFE INSURANCE

TERM TERM LIFE INSURANCE	OR	PERM PERMANENT LIFE INSURANCE
<small>Term life insurance policies provide coverage for a set time, or term, and build no cash value.</small>		<small>Permanent life insurance policies are in effect throughout the policyholder's life as long as premiums are paid.</small>

Talk to a financial professional to learn how life insurance types can work for you.

3542_89608 **TRANSAMERICA**

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.

EXAMPLES:



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.

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. While you're entitled to your opinion, remember that your account may be officially affiliated with Transamerica.

CONTENT TOPICS – COMMUNITY

Showing that you're involved in your communities 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 – a very admirable quality.

EXAMPLES:



QUICK TIP: Facebook has an amazing Event feature. If you or your office are planning an event, make sure to use this functionality to attract more attendees.



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

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.



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

 **Nils Thorson - Transamerica Agency Network**
April 1 at 8:31 AM · 🌐

If you're considering life insurance, you may not understand the difference between term and whole life. Transamerica is here to help.
<https://goo.gl/WPdtqX>

DIFFERENCES IN LIFE INSURANCE

TERM	OR	PERM
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Term life insurance policies provide coverage for a set time, or term, and build no cash value.		Permanent life insurance policies are in effect throughout the policyholder's life as long as premiums are paid.

Talk to a financial professional to learn how life insurance types can work for you.

Like · Comment · Share

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

COLD LEADS

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Like · Comment · Share

 **Tim Johnson** Kerry Johnson
Like · Reply

CLIENTS

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Like · Comment · Share

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

ANGRY USERS

 **Nils Thorson - Transamerica Agency Network**
April 1 at 8:31 AM · 🌐


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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 place where you can have the most descriptive, effective conversations: email and phone.

EXAMPLE

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April 1 at 8:31 AM · 🌐

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Like · Comment · Share

John Odde This is really helpful!
Like · Reply

EXAMPLE CONVERSATION

John Odde This is really helpful!
Like · Reply

Nils Thorson I'm glad I could help! And it's nice to meet you, John! Are you also in the Denver area?

John Odde I am indeed. My family and I just moved here a few months ago.

Nils Thorson Well welcome to Denver! Where are you moving from?

John Odde We moved from Dallas.
Like · Reply

Nils Thorson Very cool. Hopefully the winters aren't too cold! If you're interested in chatting about insurance, or just Denver itself, I'd be happy to talk! If so, send me a private message and we can chat.

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

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April 1 at 8:31 AM · 🌐

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Like Comment Share

Tim Johnson Kerry Johnson
Like · Reply

SUGGESTED MESSAGES

Tim Johnson Kerry Johnson
Like · Reply

Nils Thorson... Thanks for commenting Tim! I'd be happy to help clarify anything. Do you or Kerry have any questions about this?

Tim Johnson I don't have any further questions at this time. Thanks!

Nils Thorson... No problem. I'm always happy to help. If your or anyone you know has questions about life insurance or financial protection, I'm always happy to chat about it over coffee. I'm buying! 😊

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. Use proper grammar and don't abbreviate too much (lol, thx, 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

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April 1 at 8:31 AM · 🌐

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TRANSMERICA

Like · Comment · Share

Kathy Hoeger Thanks for sharing!
Like · Reply

SUGGESTED MESSAGES

- Kathy Hoeger** Thanks for sharing!
Like · Reply
- Nils Thorson...** You're welcome, Kathy! I hope you're doing well. How was your trip to Disneyworld?
- Kathy Hoeger** Our trip was great! The family loved meeting all the characters. Thanks for asking.
- Nils Thorson...** Of course! I'm glad it went well. And by the way, I have more infographics like this if you felt it was helpful. Just let me know!

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 get angry users (or trolls) commenting on your posts to vent about something. Don't return the anger, and don't delete the message unless there's profanity. This is an opportunity to show your followers how you deal with pressure.

EXAMPLE

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April 1 at 8:31 AM · 🌐

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TRANSAMERICA

Like Comment Share

Steph Schmidt Life insurance is a scam.
Like · Reply

SUGGESTED MESSAGES

Steph Schmidt Life insurance is a scam.
Like · Reply

Nils Thorson... Hi Steph! I'd love to hear why you feel this way. Did you have a particularly bad experience in the past? Send me a message if you'd like to chat.

OR

Nils Thorson... Hi Steph! Oh no! I'd love to better understand why you feel this way. Feel free to send me a message if you'd like to discuss further.

OR

Nils Thorson... Hi Steph! I'm sorry you feel this way. Is there any way I can help? You're welcome to send me a message if you'd like to discuss this in more detail.

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.



INCREASING YOUR ENGAGEMENT

Analytics and measurement on social media



MEASUREMENT

Using data and analytics to inform 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!

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 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

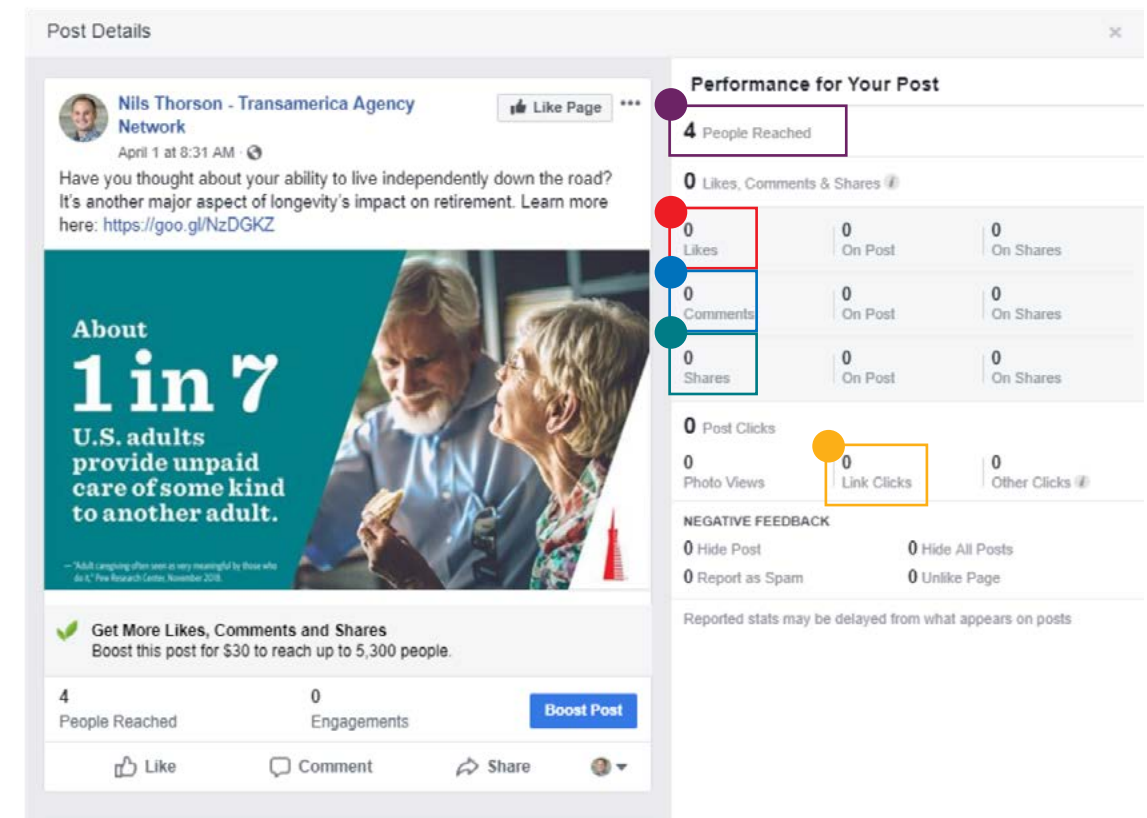
The number of times a user shared your post out to their personal community.

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.



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:



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 Transamerica 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.

QUESTIONS?

THAT CONCLUDES OUR FACEBOOK 201 COURSE

- If you'd like to learn more about Facebook, take our **Facebook 301** course or any of our Facebook elective courses.
- If you have any questions about what you can or cannot do on social media, ask your local legal council.
- If you have any questions on social media strategy or have any feedback on this course, feel free to email the Transamerica social media team at **socialmedia@transamerica.com**.

THANK YOU

