

A man with dark hair and a beard, wearing a blue and white checkered button-down shirt, is shown in profile from the chest up. He is holding a tablet computer with both hands and looking at the screen. He is wearing a silver watch on his left wrist. The background is a blurred office environment with a window and a desk.

# SOCIAL MEDIA UNIVERSITY:

# FACEBOOK 301

---

ADVANCED TACTICS & ADVERTISING

---

# TODAY'S PRESENTATION

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

**03** **PAGE 3**  
**ADVANCED ORGANIC FEATURES**  
Facebook Events, Appointments, and Offers

**10** **PAGE 10**  
**PAID ADVERTISING**  
Boosting and Facebook Ads Manager

**27** **PAGE 27**  
**PAID ANALYTICS**  
Using Data to Improve Your Campaign Efforts

All content should be compliance-approved and adhere to your company's processes.



A close-up photograph of a Black man with a beard, wearing an orange hoodie and white earbuds. He is smiling broadly and looking down at a smartphone he is holding in his hands. The background is a soft-focus outdoor setting with green foliage.

# 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.



## BE DISCOVERABLE AND AVAILABLE

Generate authority and become a searchable, verifiable business



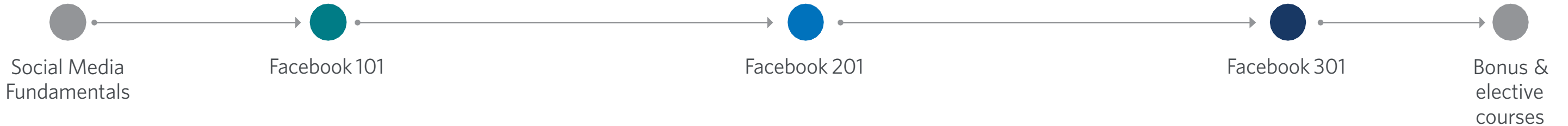
## BE A THOUGHT LEADER AND CREATE ADVOCATES

Post content to build strong relationships with existing clients



## GENERATE LEADS WITH ADVANCED FEATURES

Advertise to attract potential clients and recruits

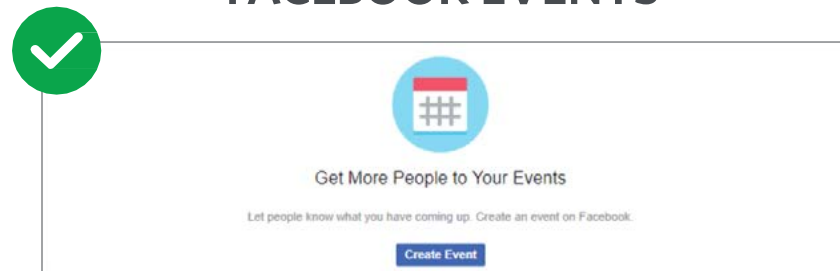




# ADVANCED FACEBOOK FEATURES

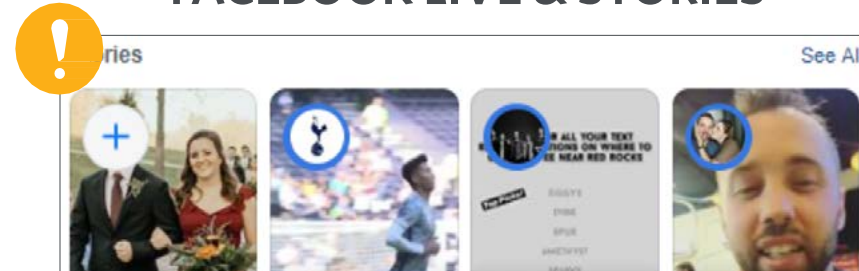
There are a lot of additional features offered to Facebook business pages. Below is our point of view on a few of the most popular ones:

## 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.

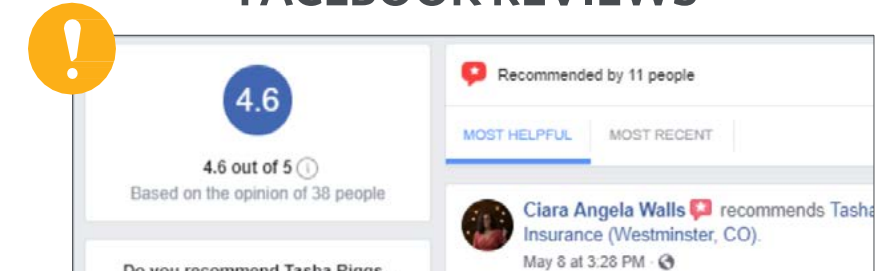
## FACEBOOK LIVE & STORIES



We discourage the use of Facebook **Live** as it's often completely unpredictable. If you work for a Transamerica entity, it is strictly prohibited.

**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

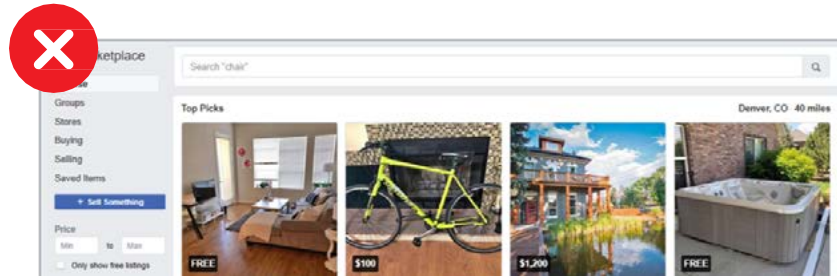


Reviews are an important part of having any social media page or digital presence. Customers search for companies online because they want to read reviews.

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:

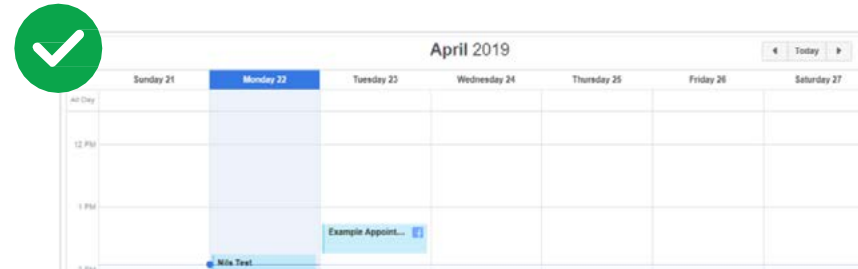
### FACEBOOK MARKETPLACE



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.

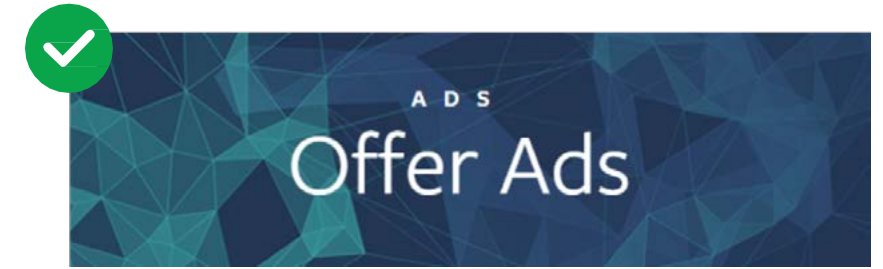
If the usage of Marketplace changes, we may change our recommendation. For now, though, we would stay away.

### 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.



# FACEBOOK EVENTS

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

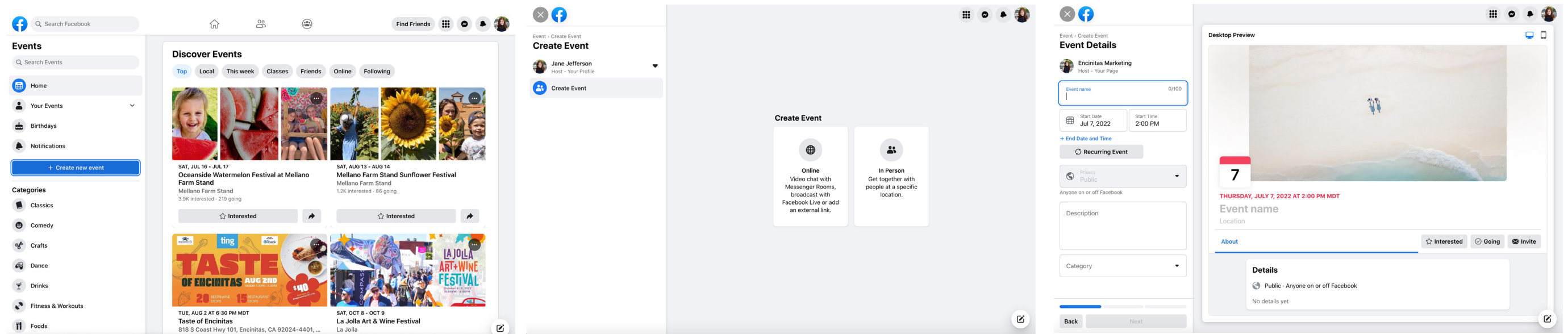
Facebook Events is one of their most popular features and is used by a wide variety of audiences. More importantly, you can “boost” your event by putting advertising dollars behind it to reach people in your local community.

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.

The screenshot displays the Facebook Events interface. At the top, there is a search bar for Facebook and a navigation bar with icons for Home, Profile, and Events. Below the navigation bar, the 'Events' section is visible, featuring a search bar for events and a list of categories: Home, Your Events, Birthdays, and Notifications. A '+ Create new event' button is also present. The 'Categories' section lists various event types such as Classics, Comedy, Crafts, Dance, Drinks, Fitness & Workouts, and Foods. The main content area is titled 'Discover Events' and includes filters for Top, Local, This week, Classes, Friends, Online, and Following. Several event listings are shown, each with a thumbnail image, dates, title, location, and interest statistics. For example, the 'Oceanside Watermelon Festival at Mellano Farm Stand' is listed for SAT, JUL 16 - JUL 17, with 3.9K interested and 219 going. Other events include 'Mellano Farm Stand Sunflower Festival', 'Taste of Encinitas', and 'La Jolla Art & Wine Festival'.

# FACEBOOK EVENTS – SETUP



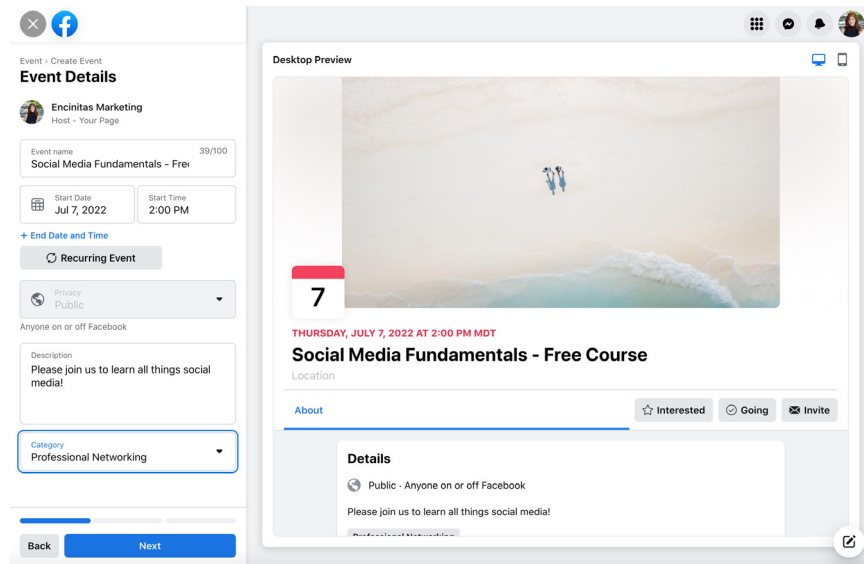
**1** Log in to Facebook and click Events on the left-hand side.

**2** Click the blue “Create Event” button and select “Create Public Event.”

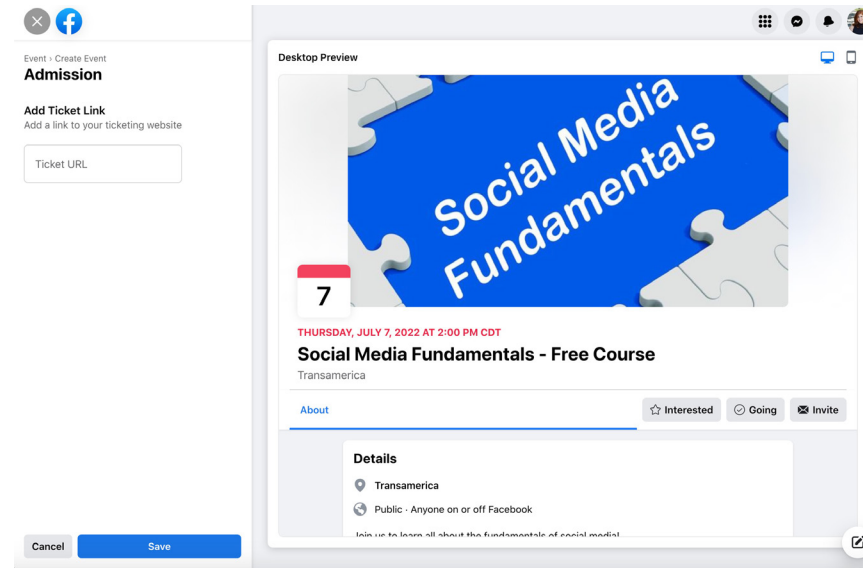
**3** Make sure to:

- Select your Facebook Business page as the host.
- Choose an eye-catching photo to use as your event photo.
- Name your event something unique. For example, instead of naming it “Financial Clinic,” try calling it “Free Financial Clinic in NE Minneapolis.”

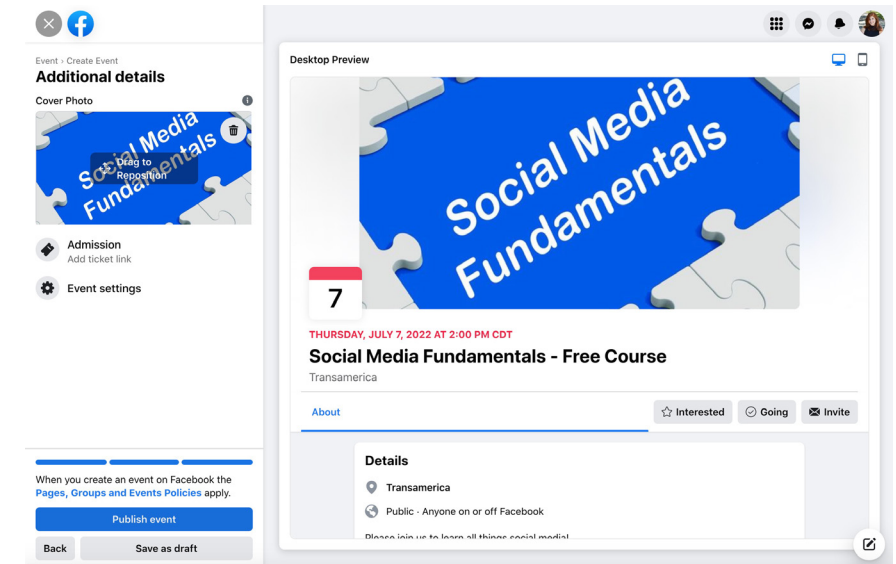




**4** Provide a detailed description of your event, choose a category, frequency, and choose your date and time. We recommend choosing an end time to give attendees an idea of how long the event will last.



**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.

A woman with voluminous curly hair, wearing a bright yellow sweater, is sitting at a desk in a modern office. She is smiling and looking at a laptop screen. Her hands are clasped together near the laptop. The office background is bright and slightly blurred, showing windows and office furniture.

# PAID ADVERTISING

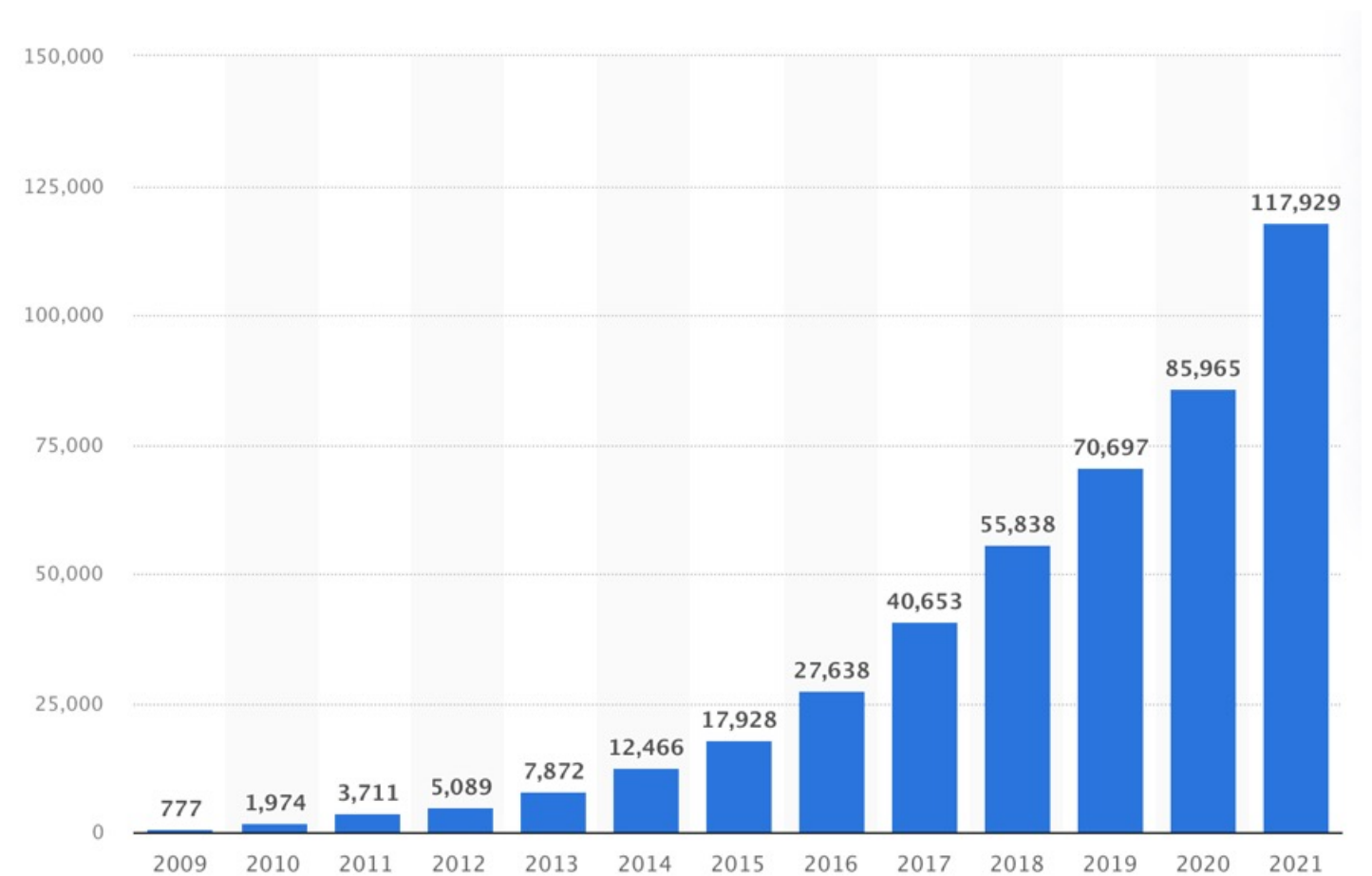
Boosting and Facebook Ads Manager



# FACEBOOK ADS – BOOSTING

Over the years, Facebook has decided to limit the organic (free) exposure of business pages to its followers. By making this change, Facebook has told some of its businesses that they need to use a small advertising budget to reach the majority of their followers.

Meta's (Formerly Facebook Inc.) Annual Revenue



\* <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 2 more comments and 5 more shares, this is the post we should boost.

Transamerica  
July 7 at 11:30 AM · 🌐

What does the rest of 2022 hold in store for the markets? Tom Wald, CIO, Transamerica Asset Management, Inc., weighs in. <https://bit.ly/3AwJssk>

**WHERE WE STAND**

**TRANSAMERICA 2022 MID-YEAR MARKET OUTLOOK**

Boost this post to reach up to 449 more people if you spend \$14. [Boost post](#)

👍👍👍 9 8 Shares

Transamerica  
July 8 at 11:02 AM · 🌐

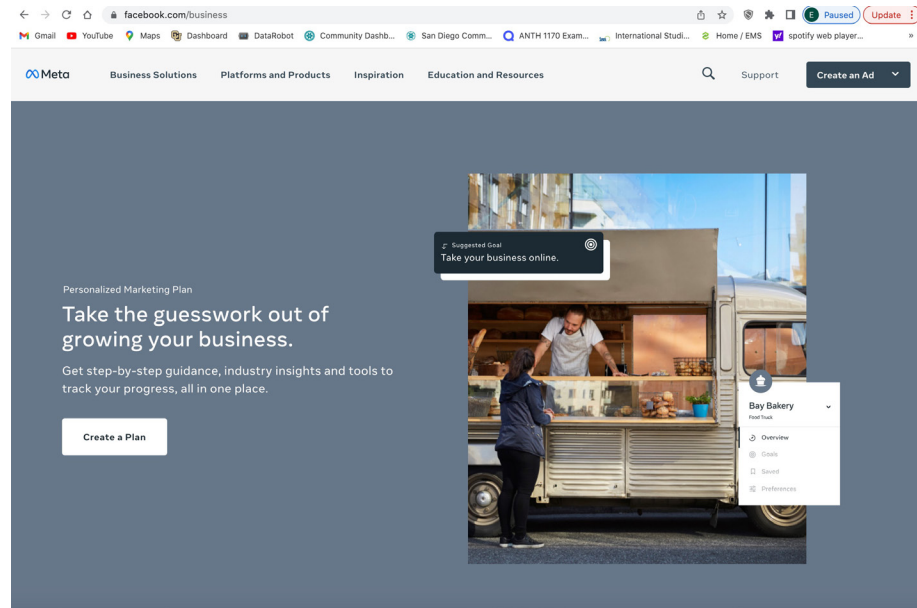
52% of Americans have some form of life insurance, but a recent poll revealed that respondents underestimated the number. Perhaps people are unaware how budget-friendly — and easy — it can be to get term life insurance. <https://bit.ly/3c2KYs8>

**80% of those polled believe less than fifty percent of Americans have life insurance.**

Transamerica LinkedIn poll, March 2022

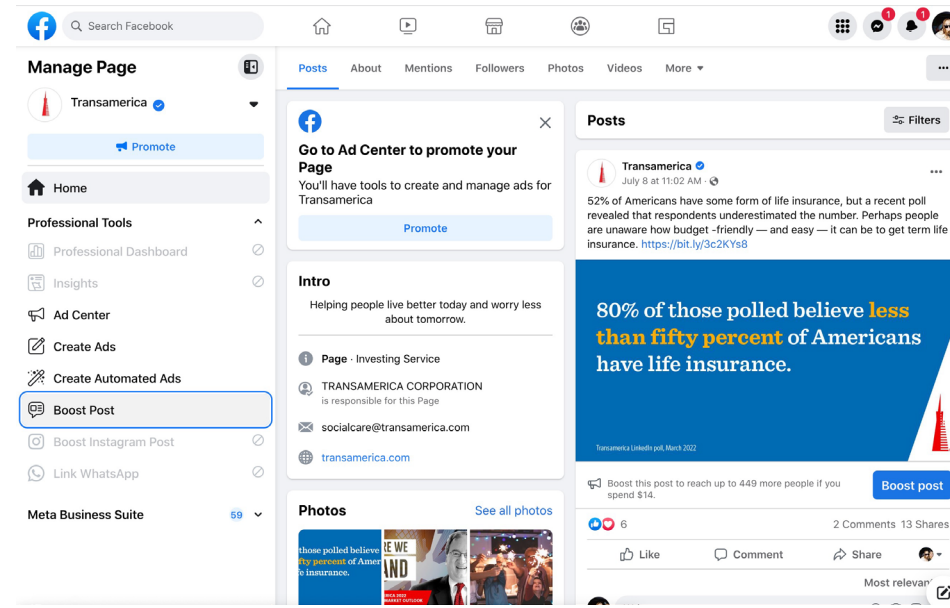
Boost this post to reach up to 449 more people if you spend \$14. [Boost post](#)

👍👍👍 6 2 Comments 13 Shares

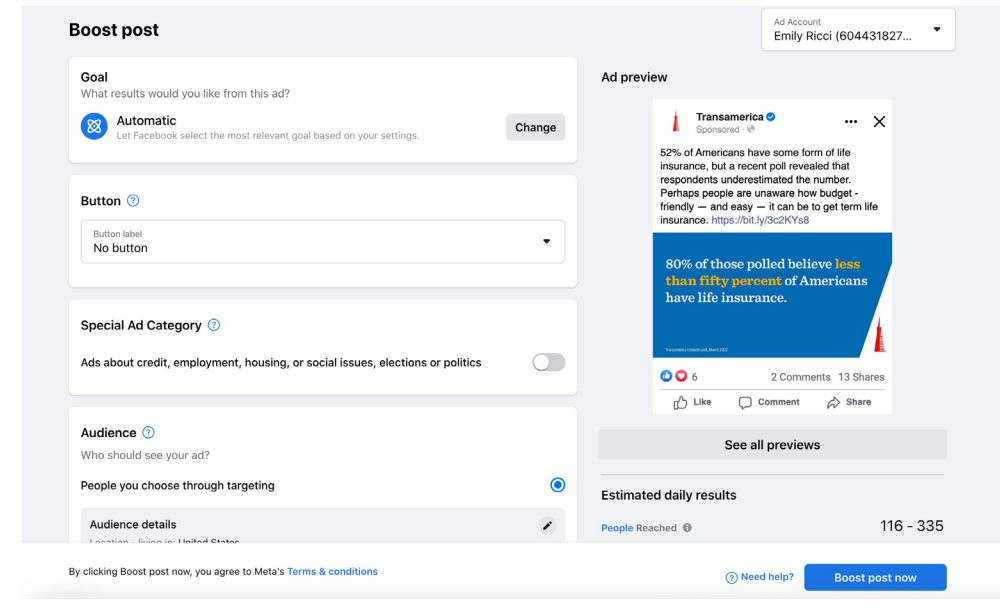


**1** To boost a post, you need to set up a payment method. To do that, you have to set up a “Business Account.” A Facebook business account is different than your business page. This account gives you access to a wide variety of business tools — all of which can be applied to your business page.

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.



**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.

### Goal ✕

What results would you like from this ad?

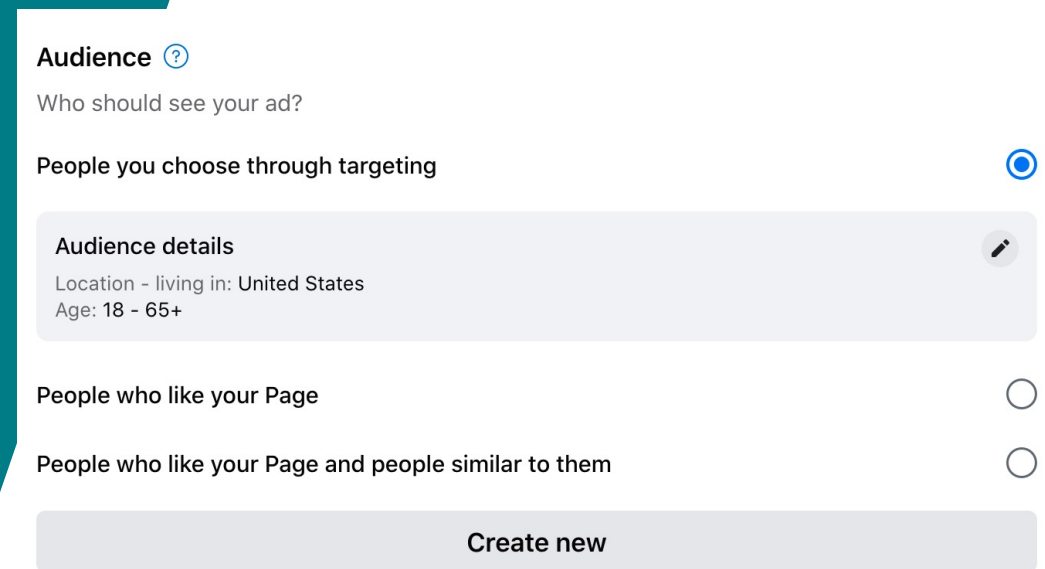
- Automatic**  
Let Facebook select the most relevant goal based on your settings.
- Get more messages**  
Show your ad to people who are likely to send you a message on Facebook, WhatsApp, or Instagram.
- Get more engagement**  
Show your ad to people who are likely to react, comment and share.
- Get 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](#)

**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.

**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.



The screenshot shows the 'Audience' selection interface in Facebook Ads. At the top, it says 'Audience' with a help icon and 'Who should see your ad?'. There are three radio button options: 'People you choose through targeting' (which is selected), 'People who like your Page', and 'People who like your Page and people similar to them'. Below the selected option is a box for 'Audience details' with a pencil icon, showing 'Location - living in: United States' and 'Age: 18 - 65+'. At the bottom is a 'Create new' button.



**Duration** ⓘ

Days: 7 [−] [+] End date: Jul 19, 2022

**Total Budget** ⓘ

Country, currency: US, USD [Change]

Estimated 116 - 335 people reached per day

**\$ 14.00** ✎

\$1.00 [Slider] \$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.

**Estimated daily results**

People Reached ⓘ	116 - 335
Post Engagement ⓘ	27 - 78

---

**Payment summary**

Your ad will run for 7 days.

Total budget	\$14.00 USD
--------------	-------------

**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.



# FACEBOOK ADS – META BUSINESS SUITE

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.

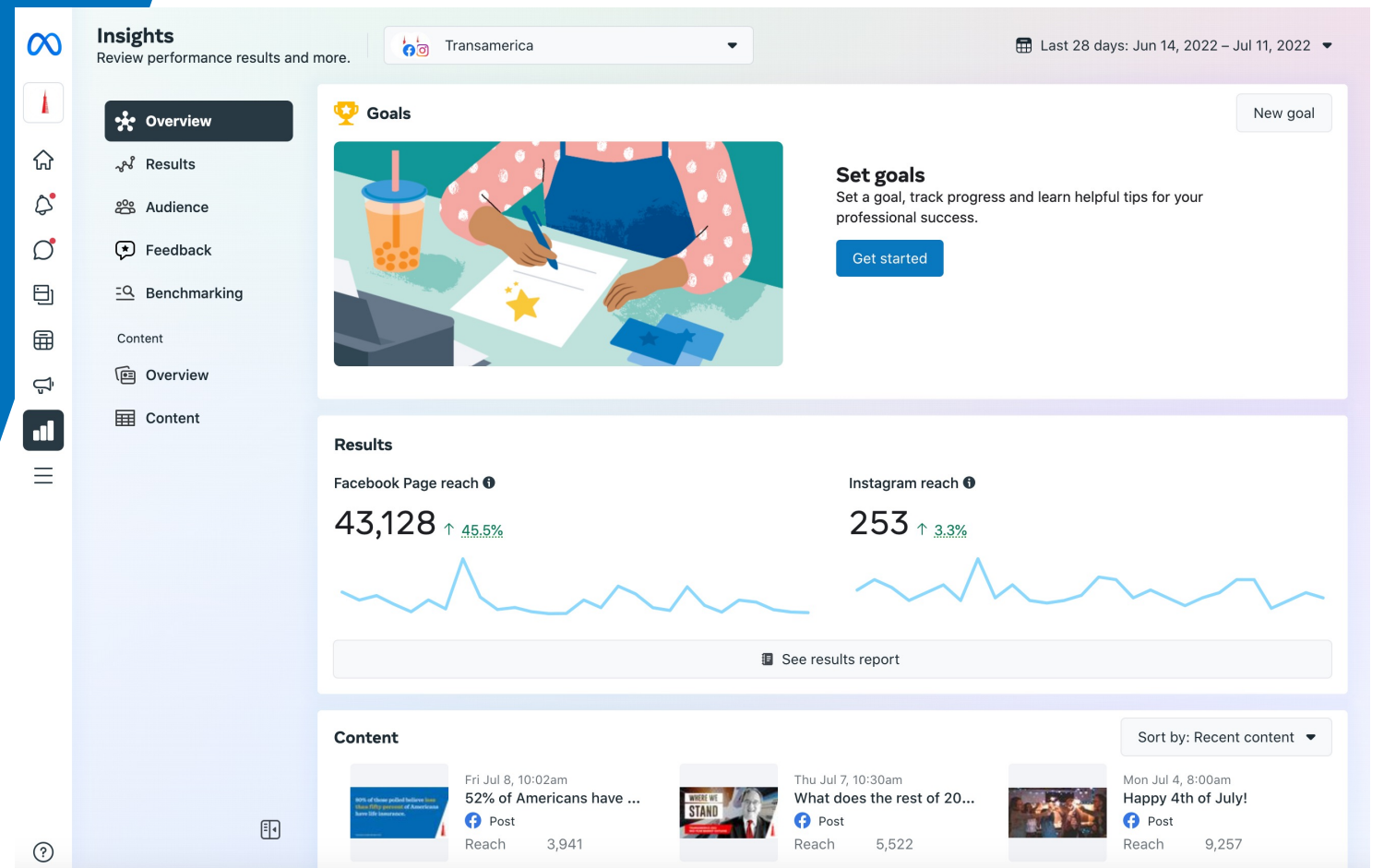
Please keep in mind that all advertising pieces must be compliance-approved prior to launching a campaign.

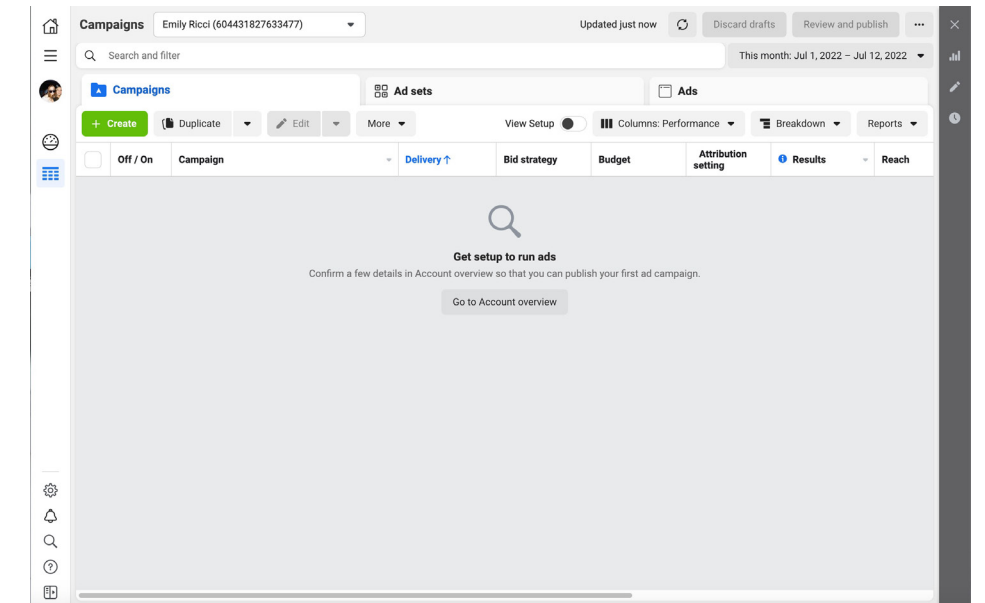
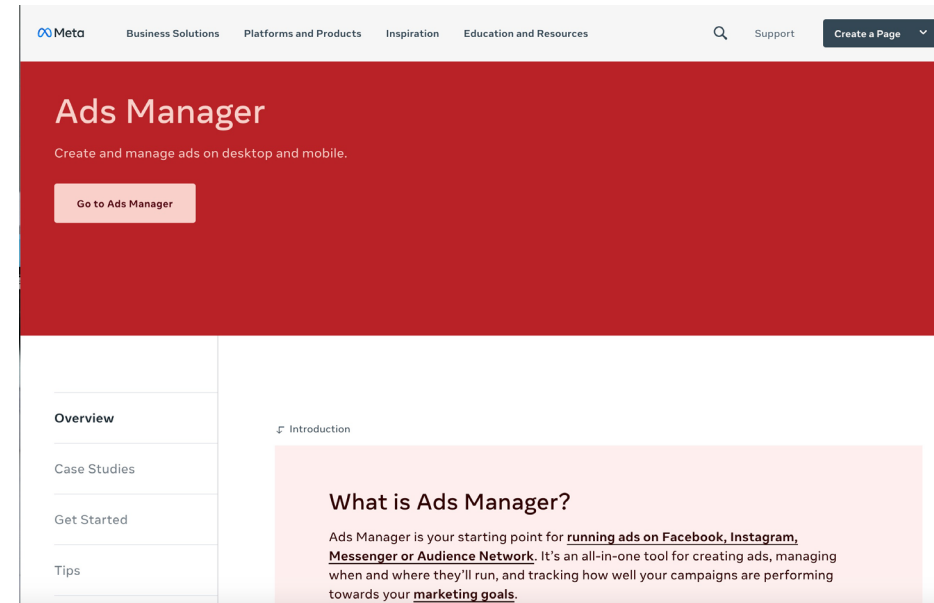
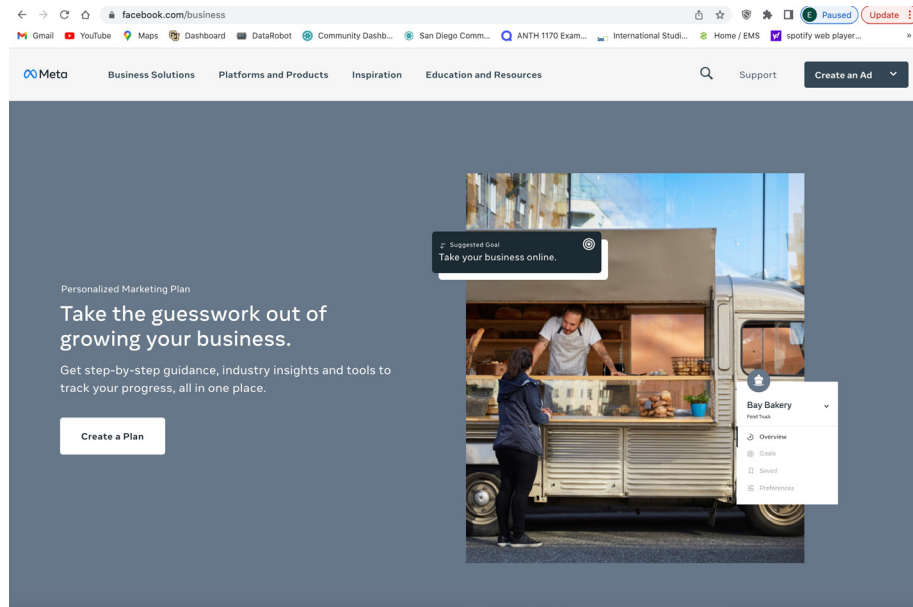
The screenshot displays the 'Posts & stories' section of the Meta Business Suite. The interface includes a left-hand navigation menu with options like Posts, Stories, Feed & grid, Facebook Photos, A/B Tests, Mentions & tags, and Unlabelled content. The main content area shows a list of posts from similar businesses, with columns for Title, Date published, Reach, and Engagements. The posts are sorted by date published, and the reach and engagement metrics are displayed for each post.

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 r... Transamerica	Thu Jun 30, 8:00am	7.6K People reached	122 Post engagements

## 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.





**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/ad-s-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.

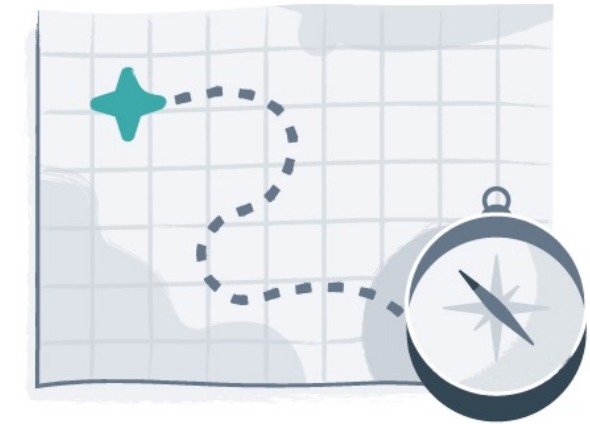


When choosing an objective for your Facebook campaign, think about how you want your money to be spent. Facebook uses campaign objectives to determine whether you value quantity versus quality, or something in-between.

### Choose a campaign objective

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

[Learn more](#)



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

Cancel

Continue

**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.

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



### 1. INTERESTS/DEMOS AUDIENCE

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



### 2. CUSTOM AUDIENCE

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



### 3. 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:



### 1. INTERESTS/DEMOS AUDIENCE

An audience based on a user's listed demographics and online activity:

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



### 2. 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



### 3. LOOKALIKE AUDIENCE


An audience built by an algorithm using a customer audience as its base.

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

## There are five types of Facebook ads:


Single Image, Single Video, Slideshow, Carousel, and 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.](#)

**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.



**Single Image**  
Create up to 6 ads with one image each at no extra charge

Single Image is the original ad unit, and can see strong success, but the image better be compelling.



**Single Video**  
Create an ad with one video

Best for brand awareness, videos are prioritized by Facebook, but don't yield high click rates.




**Slideshow**  
Create a looping video ad with up to 10 images

If you're unable to create high quality videos, this can be a good replacement. Success is varied, though.



**Carousel**  
Create an ad with 2 or more scrollable images or videos

Potentially the strongest current ad type, this is a great way to display multiple ideas/messages.



**Collection**  
Feature a collection of items that open into a fullscreen mobile experience. [Learn more.](#)

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.



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



### 1. 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.



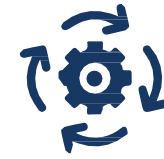
### 2. USE MULTIPLE AUDIENCES

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.



### 3. 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.



### 4. 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.



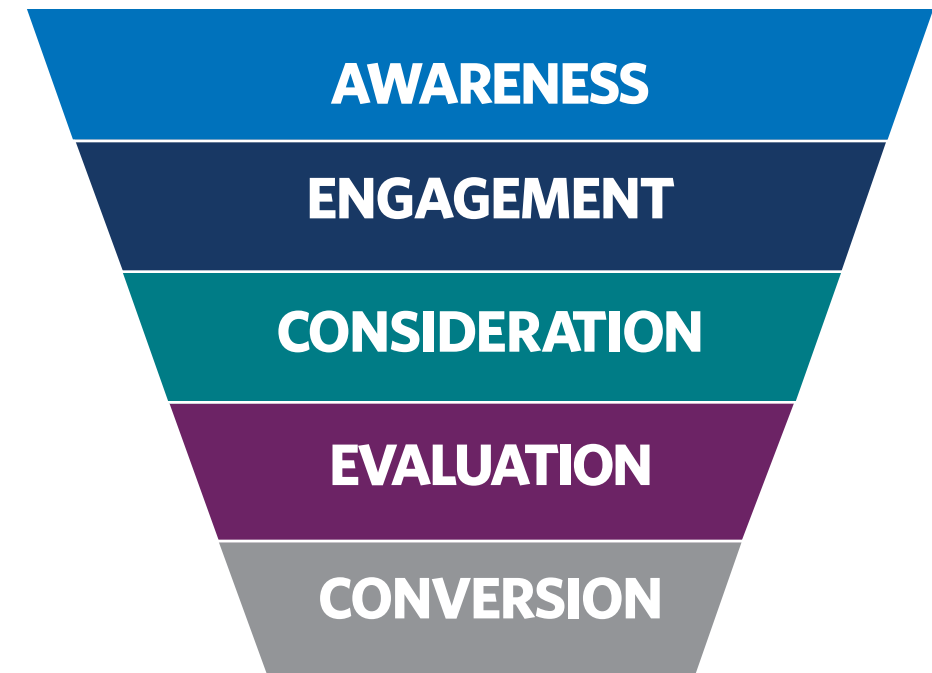
# ANALYTICS

Using Data to Improve Your Marketing Efforts

# FACEBOOK ANALYTICS

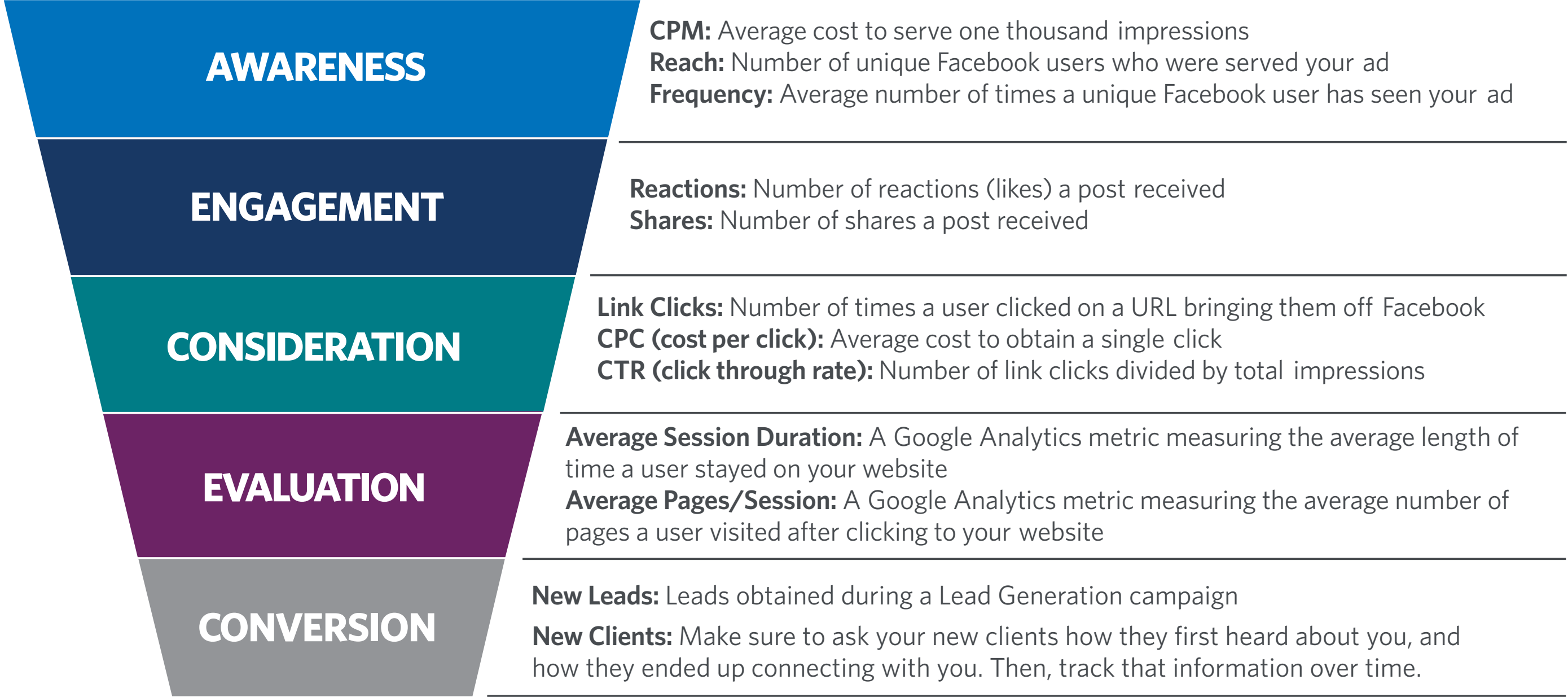
To analyze (or optimize) your boosts and/or campaigns, you'll need to understand which metrics to watch. Depending on the goal of your campaign, there are different metrics you should keep an eye on.

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.



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?

## **YOU'RE NOW READY TO START USING ADVANCED FACEBOOK FEATURES**

If you ever have any questions ...

- Ask your manager for their advice
- Ask your respective compliance or legal officer
- Contact us at [socialmedia@transamerica.com](mailto:socialmedia@transamerica.com)



# THANK YOU

