

CHUBB®

Marketing tools for Financial
Advisers

How to Set Up and Run a Business Facebook Page

About this guide

Chubb wants to support you to become more proficient with digital marketing. In today's world, managing your online presence is essential part of building and maintaining a sustainable client base and profitable business.

This guide is part of a series designed to help you develop an online presence that aligns to your business and supports your marketing activity. Please use your own discretion when applying the general advice we've provided in this document.

What we cover

In this guide, you'll learn about:

- [Creating your Facebook Business Account](#)
- [Continue to build followers of your page](#)
- [Developing your brand voice on Facebook](#)
- [Insights on page performance](#)
- [Useful Resources](#)

Creating your Facebook Business account

BEING PRESENT IN GEOGRAPHIC SEARCHES

So you're getting your business on Facebook? Great! The world's most popular social media channel isn't just for consuming entertainment and connecting with friends, but where many people get recommendations and learn too. By having a business page as a financial adviser, you'll be able to provide valuable information and build followers – some of which will become customers.

To get started with a Facebook business account, you'll need to be on Facebook as an individual first. Then, creating a presence for your business is a matter of setting up a 'page' – this will be separate from your personal Facebook account and can be branded as your business. You'll also be able to post as the page instead of yourself – ideal for keeping personal and business separate.

THOROUGH DETAIL

When setting up your Facebook page, you'll see there's quite a lot of information you can add. It's a good idea to try and include as much info as you can as this will help your page be found in search, recommended and of course inform visitors properly. What does your business provide? Where are you based? When are you open?

VISUALLY COMPELLING

The importance of a good profile photo and cover photo can't be overstated. These two places are perhaps the earliest impression potential followers will get of you. You can use the cover photo to provide key information, or instead opt for something that reflects your brand and posts. If you focus on servicing a particular region, you might want to include something visual to represent this. A profile photo should work in tandem with a cover photo – think about how your business logo works with messaging and even you. Are you representing your business effectively with just these two images? And finally – make sure your images work well when viewed on mobile devices as well as desktop.

GETTING SOME INITIAL FOLLOWERS

The first place most Facebook pages start with to find followers is in the page owner/admin's friend list. Invite friends who you've

had some interaction with in a business capacity as they'll be most likely to provide a genuine review. Then, consider reaching out to your customer database via email to invite them to follow you on Facebook to stay up to date with your advice.

Continue to build followers of your page

Building up a loyal following on Facebook isn't an overnight task – in fact the more naturally you acquire followers, the longer they'll likely stick around. So, how do you make sure you're gaining new followers frequently?

CONNECT PEOPLE TO YOUR FACEBOOK PRESENCE AT ANY OPPORTUNITY

A Facebook page is part of a suite of marketing activity, and should be cross promoted elsewhere. One of the primary places to promote your Facebook page (outside of the platform) is on your website. Here you can add a button to link people directly through to your page, and encourage them to 'Like' on Facebook. You can also share your Facebook page on other social media channels – LinkedIn being the logical place to start.

POST NEW CONTENT REGULARLY!

The best way to continually grow your business page's followers is to be an active voice in the conversation about insurance online. That means posting original content at least every week. This can take the form of a video, a post or sharing to something longer from your website. Check out our guide on 5 ideas for social media content for financial advisers if you get stuck for ideas! Posting from a business page is important because the result is more engagement with your page by followers. This may help the page and its posts to show up to friends of followers more as a page others may be interested in. This happens all without spending anything on paid advertising.

BOOST AND ADVERTISE

If you want to get big visibility quickly, paid advertising on Facebook is an excellent option. Boosting is managed from your business page from the post directly, whereas advertising is done through Facebook's Ads Manager platform. By promoting your content to

targeted audiences (you can pick interests, geography, age and a number of other variables), you can get in front of thousands of new people who previously had nothing to do with you or your followers. By advertising with the right content (e.g. something interesting to that audience) you will be able to generate new engagement and page likes.

Developing your brand voice on Facebook

Your business, even if it is a sole operator financial adviser, will take on its own personality. When running a page, it's important to think about the style of communication you use as this will affect how people view your business. Think, are you friendly and approachable, or highly technical? What's best for your target audience?

YOUR POSTS SHOULD NOT EXCLUDE ANYONE WITHIN YOUR AUDIENCE

Insurance is a product for all walks of life, so you need to consider the broad appeal of what you write. Take care to use language that's inclusive and avoid going too 'jargon-y'. You might even want to plan out content that touches on all the common groups that reflect your customers.

INJECTING PERSONALITY

As a financial adviser, your focus is about understanding and helping people with insurance solutions that makes sense for them. Don't be afraid to give followers and beyond a taste of what you are all about – this can be done by sharing content beyond just advice (see our guide on 5 ideas for social media content for financial advisers for more about this). Being human in your communications is an asset in most cases.



ENGAGE WITH YOUR COMMUNITY WITHIN THE COMMENTS

Perhaps the most revealing part of a business' true personality is how it engages with commenters on posts. Responding to comments in a timely manner doesn't always enable perfectly polished messaging, so you need to set some guidelines for how you'll conduct responses. Some good rules of thumb:

- Keep a calm, friendly and empathetic tone in your responses.
- Don't try and resolve a complaint within the comments unless it's something very simple. Invite the commenter to discuss offline or via direct message ('DM').
- Engage with good comments as well – especially if you've asked followers to share their experiences on a topic (e.g. doing a will).
- Stay on top of any discussions between followers that go into an unproductive place – that is, protect the brand and other followers from personal attacks, spam or trolling.

YOU WON'T NAIL IT STRAIGHT AWAY

Many businesses operate for years without even thinking about their brand voice or tone – so if you do some planning here you are already well ahead of the game. Just know that communications is something to be constantly worked on and improved. There are things you will learn through the course of running social media for your business – what to say, and what not to say. If you stay respectful and genuine, these lessons shouldn't be too painful. Whether you get help with your brand or do it all yourself, be sure to write down 'who you are' so that you can make changes to this over time and have them live somewhere.

Insights on page performance

Facebook Pages give you plenty of information about the performance of your page, including:

POSTS

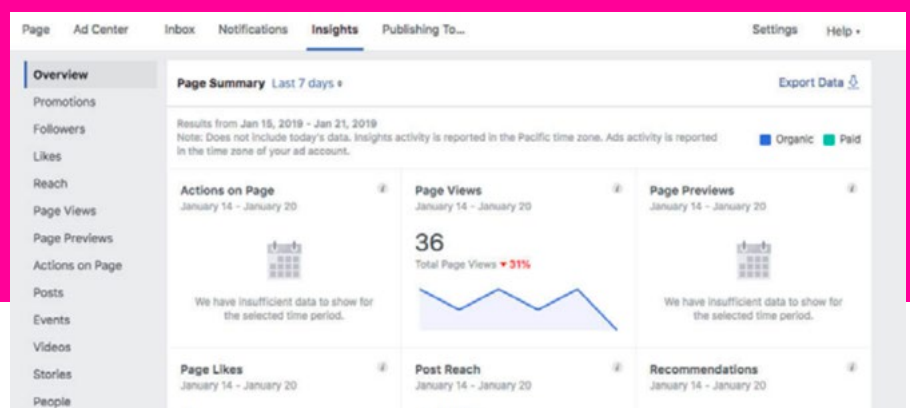
You can get some quick page insights at the main screen of your page (provided you are logged in and an admin). Here you'll see how many people you reached, how they engaged and new followers – you can see this information within a time window of the previous day, week or 28 day period.

However you can drill down into more data by selecting 'insights' on the left menu column.

WHAT INFORMATION CAN I SEE?

The insights menu / page gives you information about your page's performance across a variety of areas, including:

- Followers
- Likes
- Actions on page
- Post performance
- Reach



WHAT SHOULD I DO WITH THE INSIGHTS AVAILABLE?

The first place you'll want to look is your follower numbers – did these grow over the past week? A plateau or decline in followers is a sign you're not connecting with your audience.

Once you have a top level view of the page's performance, it's time to look at the post insights – absolute gold for understanding what content works and what doesn't. By staying close to this data, you can refocus what you post about to resonate better with your followers.

Useful resources

[Facebook's guide to setting up a business page](#) – Facebook

[Facebook help on posting as a business page](#) – Facebook