



KASASA®

Facebook

Total Facebook Account Creation and Optimization
44 minutes | 2nd Ed. February 2019

I Optimizing Your Facebook Account for Local Search

Introduction

Like a “viral” post, social media has exploded in popularity, becoming a must-have component of any marketing strategy aimed at Millennials. This e-book is part of a series we created to help community banks and credit unions take advantage of the opportunities at your fingertips.

In this guide, you’ll find a checklist that will help you optimize your financial institution’s Facebook profile and increase your chances of being discovered by local consumers. Here are some recommendations for the guide:

1. Start with the checklist. If you need a refresher or hit a snag, the corresponding section contains a complete walk-through.
2. Be consistent in how you spell your name, address, and phone number across all sites. For example, don’t list your address as 111 Banking Drive on one site, and 111 Banking Dr. on another.
3. List the branch’s actual phone number, not 800 numbers.

What makes Facebook worthwhile?

If you’ve ever wondered exactly how big of a deal Facebook is, consider this: in a network of nearly 2 billion active monthly users, 510,000 comments are posted and 293,000 statuses are updated every minute. No other social network facilitates such access to consumers through a combination of advertising and direct communication. Engage Facebook as your ally, and you will find a world of opportunity.

I Facebook checklist

- ☐ Create a business page
- ☐ Merge or remove duplicate pages
- ☐ Complete your “About” section
- ☐ Optimize your page settings for growth
- ☐ Claim your vanity URL
- ☐ Create a CTA button
- ☐ Verify your page
- ☐ Encourage check-ins
- ☐ Encourage reviews
- ☐ Apply for Facebook Locations
- ☐ Develop a content strategy

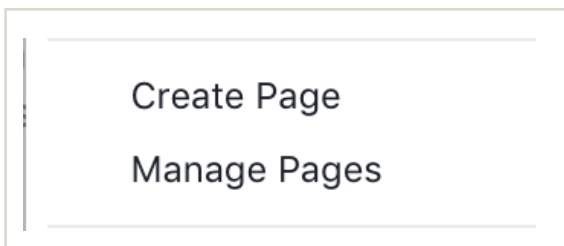
II Facebook How-tos

Create a business page


- 1 Log in to Facebook with your personal account.
- 2 Click once on the triangle in the top right corner to expand the dropdown menu.




- 3 Select "Create Page."



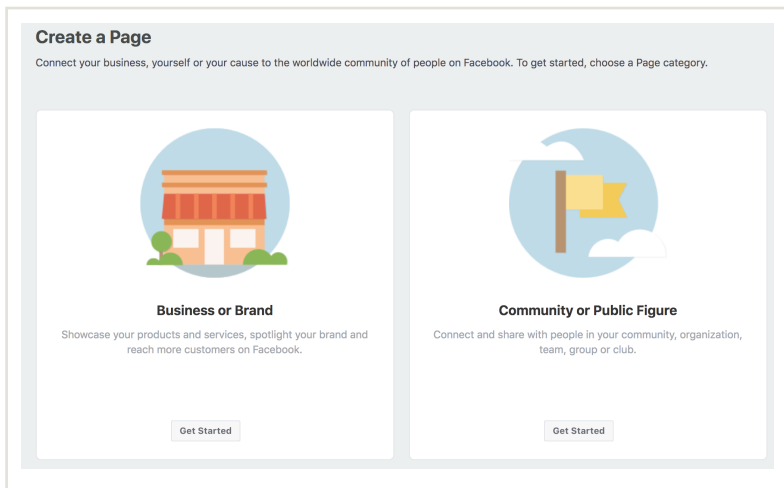
Creating a business page

 5 minutes

 A personal Facebook account

II Facebook How-tos

- 4 Since you are creating a page for your financial institution, select “Get Started” on the “Business or Brand” square.



- 5 Fill out the “Page Name” and “Category” fields. For category, write one or two words that describe your business type. Facebook will generate options related to your entry. Choose the one that is most related to your business.

Business or Brand
Connect with customers, grow your audience and showcase your products with a free business Page.

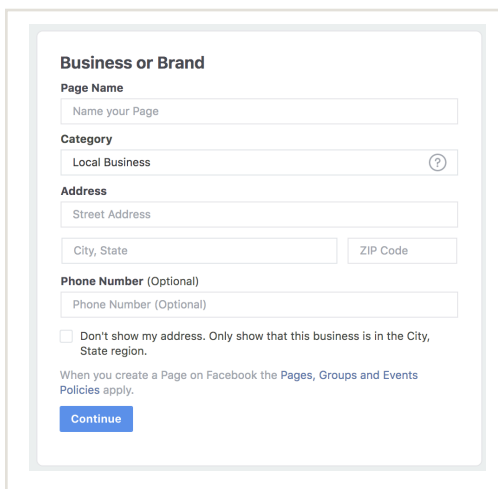
Page Name

Category
 ?

When you create a Page on Facebook the [Pages, Groups and Events Policies](#) apply.
[Continue](#)

II Facebook How-tos

- 6 A business-related category leads to additional fields. If you chose something like bank, credit union, or financial institution as the category, you should be prompted to enter the address and phone number of your branch. Fill out all of the available fields. Remember to be consistent with the spelling of your name, address, and phone number across all social media sites.



The screenshot shows the 'Business or Brand' setup form on Facebook. It includes the following sections and fields:

- Business or Brand**
 - Page Name**: A text input field with the placeholder 'Name your Page'.
 - Category**: A dropdown menu showing 'Local Business' with a help icon (?) to its right.
 - Address**: Three input fields: 'Street Address', 'City, State', and 'ZIP Code'.
 - Phone Number (Optional)**: A text input field with the placeholder 'Phone Number (Optional)'.
 - A checkbox labeled 'Don't show my address. Only show that this business is in the City, State region.'
- When you create a Page on Facebook the [Pages, Groups and Events Policies](#) apply.
- A blue **Continue** button at the bottom.

II Facebook How-tos

Updating an existing page

If you have an existing page and want to check or update your page info, go to your “About” section. Under “General” you will see your category, name, and username. Select “Edit” to make changes.

GENERAL

Category	Financial Service	Edit
Name	Kasasa	Edit
Username	@AskForKasasa	Edit

II Facebook How-tos

Merge or remove duplicate pages

Sometimes a fan of your business makes a page for you, or an employee makes one and then changes positions. Passwords get lost. New pages get made.


While this is common, it can be confusing to both consumers and to search algorithms. It can create unnecessary competition for your Facebook page and be a reputational risk for your institution. If you're an admin of multiple pages, you can merge them into one page. You'll retain fans and check-ins, but lose reviews and content from one of the pages. To merge a page:


- 1 Go to facebook.com/pages/merge.
- 2 Select the two pages you want to merge and click "Merge Pages."
- 3 Select the page you want to keep moving forward, and select "Keep Page."
- 4 Click "Confirm."

If there is a duplicate page that you don't have admin rights for but is representing your business, you will need to report copyright infringement or trademark violation. You can submit a claim here:

<https://www.facebook.com/help/440684869305015/>

Merge or remove duplicate pages

 5 minutes

 Access to the pages you want to merge

II Facebook How-tos

Complete your “About” section

Your “About” section is made up of several fields. To fully optimize your profile, you should complete them all.

☐ Address

This should be the actual branch location. Remember, be consistent in how you list the address, including abbreviations.



Kasasa

Loans · 9 ft · 4516 Seton Center Pkwy, Ste 300, Austin, Texas 78759

☐ Hours

List your open hours. This will also impact possible auto-responder options for Facebook messages.

☐ Parking

☐ Price Range

Set to “Unspecified.”

☐ Founding Date

☐ Contact Info

☐ Phone

Make sure this is the phone number to the actual branch. It should be a local number, not an 800 number.

☐ Messenger URL

Complete your about section

20 minutes



Copy about your business, a profile picture (180 x 180), a cover image (820 x 312)

II Facebook How-tos

☐ **Email**

This should be an email address that is available to the public for support. Ideally, it is tied to your institution's domain. Example:

Social@Kasasa.com.

☐ **Website**☐ **Social Media Links**☐ **About**

Depending on the length of your page name, the first 70 characters of this section is what will show up in Google's results.

☐ **Company Overview**

This is your chance to dive deep into what your business provides. Mention all of the services you offer in a natural, organic way.

☐ **Products**

Let potential consumers know what products you have. This is a great place to share that you offer Kasasa!

☐ **Story**

Here you can tell the story of your business from when you were founded to now.

☐ **Milestones**

Include any interesting milestones, like awards, in this section.

☐ **Upload a profile (180x180) and cover photo (820x312)**

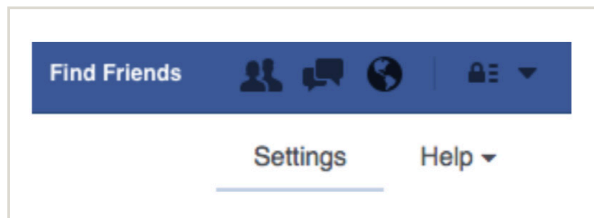
II Facebook How-tos

Optimize your page settings for growth

Your page settings will impact who can interact with you, and thus how discoverable your page is.

To access your page settings:

- 1 Navigate to your Facebook Business Page.
- 2 Click “Settings” in the top right.



Optimize your page settings for growth

🕒 5 minutes

🔧 None

II Facebook How-tos

The setting recommendations below are a combination of ease of management and discoverability.

In the General category:

- ☐ **Page Visibility**
Make sure your page is set as published.
- ☐ **Page Verification**
Verify your page (See section on page verification).
- ☐ **Visitor Posts**
Allow visitors to publish to the page and allow for photo and video posts.
- ☐ **Post and Story Sharing**
Post sharing to stories is on.
- ☐ **Messages**
Allow people to contact your page privately.
- ☐ **Tagging Ability**
Allow people to tag photos posted on your page.
- ☐ **Others Tagging This Page**
Allow people and other pages to tag.
- ☐ **Page Location for Effects**
Allow people to use your page's location for photo and video frames and effects.
- ☐ **Country Restrictions**
Page is visible to everyone.
- ☐ **Age Restrictions**
Page is shown to everyone.
- ☐ **Profanity Filter**
Set profanity filter as medium.

II Facebook How-tos

In the Messaging category:

General

- ☐ Use the Return key to send messages – off
- ☐ Prompt people to send messages – on
- ☐ Help people start a conversation with your Page – on

Response Assistant

- ☐ Send instant replies to anyone who messages your page – off
- ☐ Show response time – on
- ☐ Stay responsive when you can't get to your computer – on
- ☐ Show a Messenger greeting – off

When you're crafting your away message, let the consumer know that their message was received, when they can expect a response, and any alternate (preferred) methods that they can use to get in touch. An example would be: "Thanks for reaching out. We're out of the office right now, but we will reopen tomorrow morning at 8am and will get back to you as soon as possible. If you're having trouble with your account, please call 555-5555."

II Facebook How-tos

It's important that you let consumers know if you accept messages, and if not, tell them the channels where you do provide support. The FFIEC states "reputation risks exist when the financial institution does not address consumer questions or complaints in a timely or appropriate manner." Additionally, you will need to keep a copy of all comments and your responses for three years.

We recommend leaving Instant Replies on if you are going to give support through Facebook and will be checking messages frequently (within 24 hours). If that is not the case, then turn off Instant Replies and let consumers know that they should use an alternate contact method.

II Facebook How-tos


Claim your vanity URL

A vanity URL will transform your Facebook Page address from a series of numbers and characters to an easier-to-remember name of your choosing. Claiming your vanity URL is simple. Go to the “About” section of your page. Under the “General” section you can edit your username. Enter the name you would like. Choose something close to the name of your institution if possible.

GENERAL

Category	Financial Service	Edit
Name	Kasasa	Edit
Username	@AskForKasasa	Edit

Claim your vanity URL

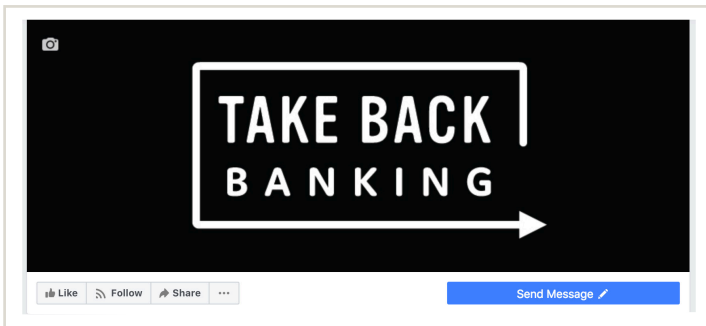
 2 minutes

 An unclaimed Facebook URL

II Facebook How-tos

Create a CTA button

CTA buttons are located in the banner image on your page and are an excellent way to prompt visitors to take some action.



Your options for CTA buttons are:

- Book Now
- Call Now (Only available if accessed via mobile device)
- Contact Us
- Send Message
- Use App (Only available if accessed via mobile device)
- Play Game
- Shop Now
- Sign Up
- Watch Video
- Send Email
- Learn More

Your choice will depend on your business objectives. For example, if you are looking to drive loans, you might want to push appointments and use the “Book Now” or “Call Now” option. As a default, we recommend using “Learn More.”

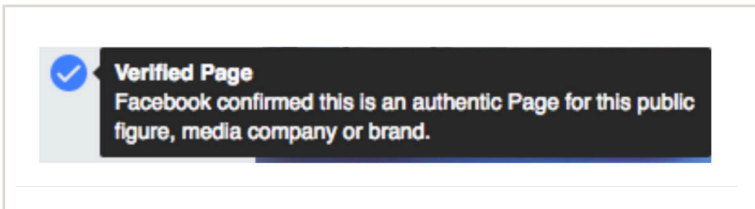
Create a CTA button

🕒 2 minutes

🔧 A target destination for the button (URL)

II Facebook How-tos

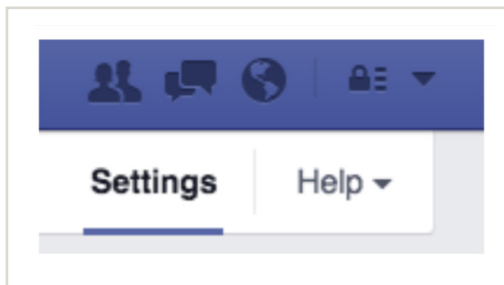
Verify your page



Verified pages are ones that have taken the extra step to confirm they are an authentic business with Facebook. There are two ways this can be done: 1) Through a robo-call, 2) By submitting business documents. Once your page is verified, it will be featured more in search results.

To verify your page:

- 1 Go to your Facebook Page.
- 2 Click "Settings" in the top right.



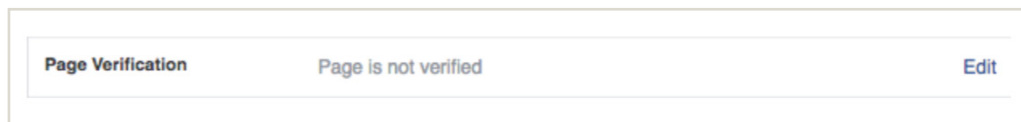
Verify your page

⌚ 5 minutes

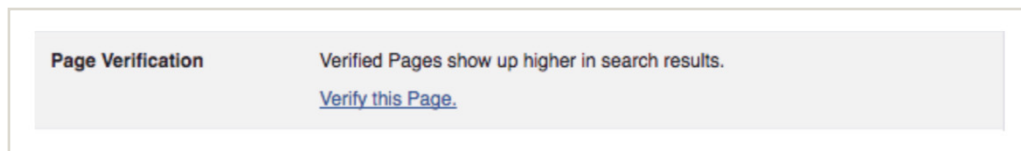
🔧 Access to the telephone whose number is associated with the Facebook page or appropriate business documents

II Facebook How-tos

- 3 In the “General” tab, click “Page Verification.”

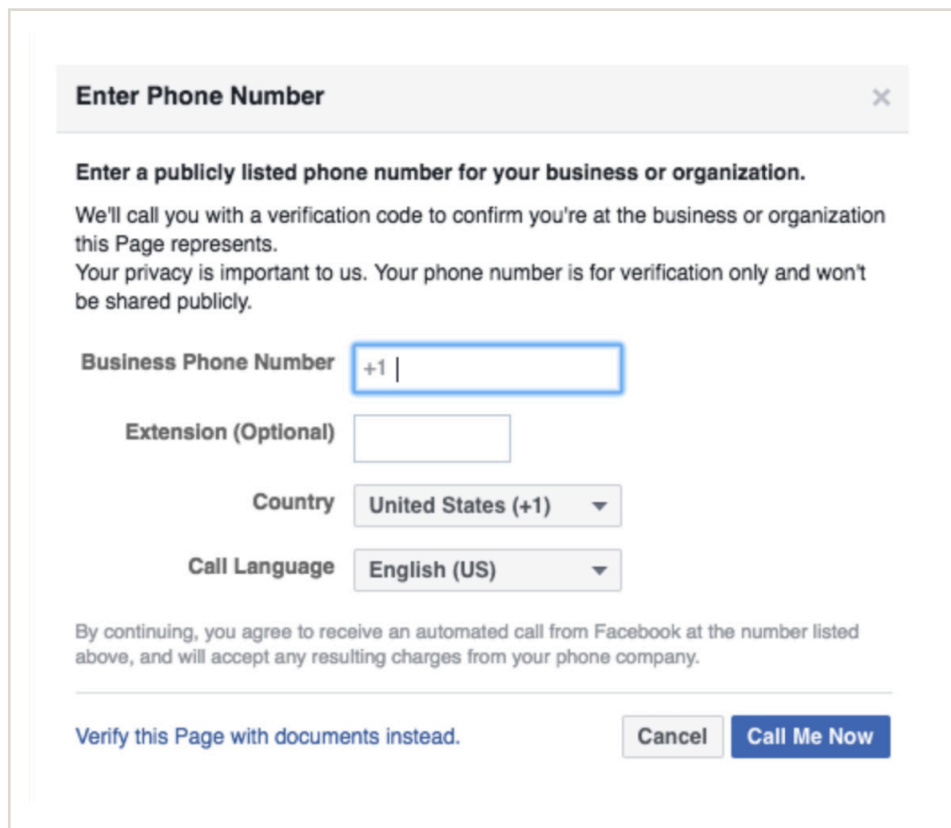


- 4 Click “Verify this Page.”



II Facebook How-tos

- 5 Enter in your businesses phone number and select “Call Me Now.”



The screenshot shows a Facebook dialog box titled "Enter Phone Number" with a close button (X) in the top right corner. The dialog contains the following text: "Enter a publicly listed phone number for your business or organization. We'll call you with a verification code to confirm you're at the business or organization this Page represents. Your privacy is important to us. Your phone number is for verification only and won't be shared publicly." Below this text are four input fields: "Business Phone Number" (containing "+1" and a cursor), "Extension (Optional)" (empty), "Country" (a dropdown menu showing "United States (+1)"), and "Call Language" (a dropdown menu showing "English (US)"). At the bottom, there is a line of text: "By continuing, you agree to receive an automated call from Facebook at the number listed above, and will accept any resulting charges from your phone company." Below this line are three buttons: "Verify this Page with documents instead." (a link), "Cancel", and "Call Me Now" (a blue button).

- 6 If you choose to verify through documents, select “Verify this Page with documents instead” in the lower left corner.

II Facebook How-tos

Encourage check-ins

Check-ins help your institution in several ways. First, they help Facebook to see that you are a popular business in the community. Secondly, when a consumer checks in at your institution, it alerts their network. Here are three tactics to encourage check-ins.

Tactic 1: Ask

Place table tents or window clings in your branch letting consumers know you are on Facebook and encouraging them to check-in.

Tactic 2: Reward Check-ins

Consumers will be more likely to check-in if there is a benefit to them. Be creative with your benefits. Double the lollipops from the teller with check-in? 10 minute meet-and-greet with the branch manager?

Tactic 3: Set up Facebook Wi-Fi

This option is only available if you are in the “local business” category. Facebook Wi-Fi lets customers check-in at your business to access the free Wi-Fi. To create this:

1. Have a router that supports Facebook Wi-Fi.
<https://www.facebook.com/help/109150235937957>
2. Enable the feature on your router.
<https://www.facebook.com/help/126760650808045/>
3. Configure Facebook Wi-Fi for the correct page in the Configuration Panel.

II Facebook How-tos

Encourage reviews

Not only do reviews serve as social proof to prospective consumers and valuable feedback to you, but they help you to rank higher in search. In 2017, 13% of consumers were likely to leave a review after a positive experience at a bank, but this number grew to 19% in 2018.¹ Here are some tactics to help you get more reviews:

Tactic 1: Ask

Asking specifically for a review isn't polite, but asking for feedback is, and has been proven to be more effective. You can ask for feedback in person, through collateral around your branch, or even in your digital content.

In person: "By the way, we're on Facebook! We would love to hear how we can better serve you."

Through collateral: A table tent that reads "Have feedback? Let us know over on Facebook.."

Digital content: Make a Facebook post that says "How are we doing? Let us know how we can improve by leaving a review."

Tactic 2: Highlight reviews

When someone leaves you a nice review, show it off. Secure the consumer's permission to use it, and then make a Facebook post using their quote.

¹2018 ReviewTrackers Online Reviews Survey

II Facebook How-tos

Tactic 3: Respond and say thanks

Make it a practice to respond to every review that you receive within 48 hours. 45% of consumers are more likely to visit a business if it responds to negative reviews. Not only is this a social media best practice, but it is important to mitigate reputational risk.

Tactic 4: Share with your team

Positive feedback can do wonders for your team, plus demonstrating that reviews are an important component to your culture will encourage the rest of your team to be thinking about how to ask for feedback.

II Facebook How-tos

Apply for Facebook locations

This feature will allow for multiple locations to all connect to a single page, thereby making it easy to manage content and community without having separate pages for each branch.

You can apply for this feature here:

<https://www.facebook.com/business/a/facebook-locations>.

Have a content strategy

It's not enough to build and optimize a page — you must provide relevant content for a community to build around. Think of your content like saving for retirement. Success is found from making consistent contributions over a long period of time. Some types of content that we've seen perform well re: employee highlights, community event photos, financial tips and tricks, how-to guides, Q&As, and celebrating institutional milestones.

II Facebook How-tos

Time to get started

Completing this guide is a great way to establish your brand on Facebook. With a little time and guidance, it won't feel overwhelming. We're passionate about helping community financial institutions develop winning social media strategies.

Ready to create raving fans and loyal customers with Kasasa?
[Contact us](#) to get started.