



CHUBB®

Marketing tools for Financial  
Advisers

## Boosting Posts and Creating Ads on Facebook

# 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:

- [Boosting or advertising?](#)
- [How to boost a Facebook post](#)
- [Setting up an Ad account for Facebook](#)
- [Creating an ad campaign](#)
- [Tips for effective ads](#)
- [Deciding on a budget](#)
- [How to determine if Facebook ads worked for you](#)
- [Useful resources](#)

# Boosting or advertising?

Let's start with what these two terms mean.

## BOOSTING

'Boosting' is promoting a post on your business' Facebook page and is managed **from within the business page**. You'll see a 'boost post' button on the post if you are the admin of that page (which you should be!).

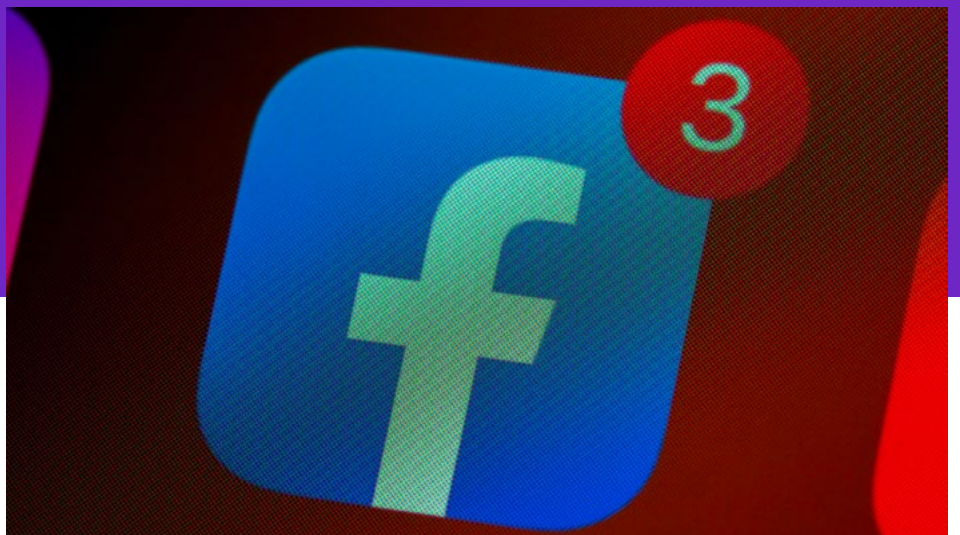
## ADVERTISING

When we talk about Facebook Advertising, we refer to the Facebook Ads Manager platform which allows you to manage multiple campaigns, audiences and pages in one place.

## SO WHAT'S RIGHT FOR YOU?

If you simply want to promote a post beyond your followers every so often, a boost might be enough for you – you can still choose some targeting options with a boost quite easily.

However, if you want to run frequent advertising for your business, including ads that aren't associated with any posts on your page (such as an image or video ad created for a specific audience who haven't interacted with you before), then you'll want to set this up with Ads Manager.



# How to boost a Facebook post

Help get a post more visibility and engagement with a few [simple clicks and options](#) within the business page environment. There are four main things to think about when boosting:

## TARGETING

Who do you want your post to reach? Think about the content and who would resonate best with it. If you've done a video about life insurance, you can target age groups, interests and other traits that reflect an audience who'd be interested in this. Facebook will give you an indication of the potential audience size. Try and reach a balance between enough reach and tight enough targeting that gets the best engagement on your post.

## BUDGET

Set a total budget for your boosted post. This budget will determine how much your post will be served to your audience. While it's probably a good idea to start with a modest budget, don't go too light as your post may not be served enough to generate a meaningful result, i.e. likes on your page, link clicks or engagement. Facebook will also recommend a budget when you choose to post – but you should decide what's an acceptable test amount.

## TIMEFRAME

Choose how long you want your post to run for. Depending on the content you will either want to run a concentrated campaign for a few days, or extend circulation of the post for a week. Content over a week will start to taper off as the same people see it. Try sticking to a week maximum – once the week is over, choose a different post to promote.

## PAYMENT DETAILS

Add your credit card details to take payment for running the promoted post (if this is the first time boosting).

# Setting up an Ad account for Facebook

If you want to get a bit more control over your advertising, you'll want to set up campaigns within the Facebook Ad Manager environment. [Facebook Ads Manager](#) does take a bit of a learning curve to understand, but start small and you'll start to learn the benefits of running ads this way.

## CREATING AN AD ACCOUNT

You'll have an Ad Account which is associated with you as an individual on Facebook (a personal account). Here you can add in payment details and other details. With an Ad Account you can invite other Facebook users to manage your Ad Account such as a digital marketing expert.

## AD MANAGER STRUCTURE

Under your ad account sit campaigns. Within a campaign lives ad sets which house collections of ads.



# Creating an ad campaign

Create a campaign in Ad Manager towards a marketing goal for your business.

## DETERMINE HOW YOUR ADS ARE SHOWN BASED ON YOUR OBJECTIVE

Facebook knows how to serve an ad campaign to people most likely to take certain action.

If you simply want to get in front of as many relevant people as possible, you can configure the campaign towards reach. But for other ads, you may want to generate traffic through to a website landing page, in which case there's a targeting option for that too:

Awareness	Consideration	Conversion
Brand awareness	<input checked="" type="checkbox"/> Traffic	Conversions
Reach	Engagement	Catalog sales
	App installs	Store visits
	Video views	
	Lead generation	
	Messages	

## SET A BUDGET FOR THE WHOLE CAMPAIGN

It's a good idea to set a campaign \$ spend limit at this level to keep control of costs.

## SET UP AN AD SET

An ad set is where you control a lot about the targeting of your ads including the budget for that ad set, running time (including end date!), and targeting. Some of the ways you can target include:

- Location
- Age
- Gender
- Interests

- Job Title

This part is really important – you will want to align the creative (your ads) and your targeting to generate the best possible performance. Take some time to think about the audience you're trying to reach and play around with Facebook's targeting parameters to dial into this group as best you can.

# Tips for creating effective ads

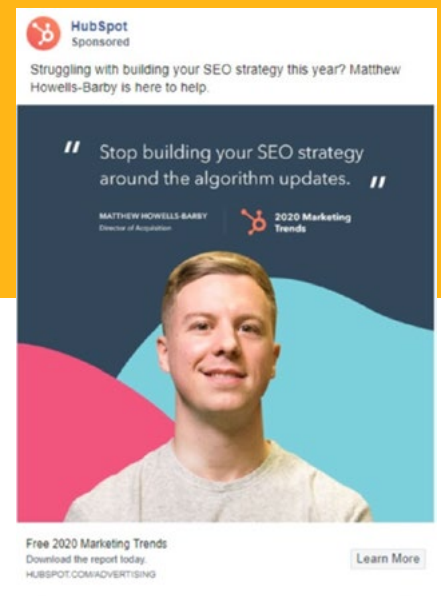
Once you've got your campaign set up, outlined your targeting within your ad set, select the duration start and end dates, it's time to make some great ads!

## PEOPLE LIKE ADS THAT MOVE

While it's much faster to create a single image ad with some copy – and there's a place for these in your ad mix, it's worth trying to create either a multi-image carousel ad or better yet, a video ad. This is because engagement with moving images received far greater attention and engagement with users on Facebook. A video will play silently during a scroll through the newsfeed which can pique users' curiosity to stop and play. A carousel encourages people to swipe through each image – with individual captions to reinforce your most important messages.

## USE THE COMBINATION OF AD COPY, HEADLINE AND CREATIVE

You don't need to fit all information within the visual part of your ad. Facebook Ads, which also deliver to Instagram, allow you to write copy within the post, a headline and select from a range of 'call-to-action' (CTA) buttons such as Sign up, Learn More and Get Quote. However, if you really want to push your brand message within the visual part of the ad, Facebook removed the 20% of image restriction for text in 2020.



### INCLUDE PEOPLE WITHIN YOUR ADS

As a financial adviser providing support to Kiwis with their insurance, trust is essential. That's why an ad that includes you, either an image or presenting your video ad is a good way of establishing that trust. This gives people a good preview of who you are and what you might be like to work with.

### GOING FOR TRAFFIC AND LEADS? GIVE PEOPLE A REASON TO CLICK

Part of any effective digital marketing advertising designed to generate traffic is providing a clear idea of the value people will get by clicking. You may need to set up some of this value within the ad, such as an interesting fact around Kiwis' insurance habits. The CTA can then be based around the next logical step in the conversation such as learn more about finding the right insurance, or get a quote to see what cover will cost you.

### CREATE VARIANTS TO LEARN WHAT WORKS

One version of an ad only gives you insight as to how that approach worked – well or not. By having multiple versions of the ad, with slight changes such as the copy, headline, call to action etcetc. can help you build understanding of what resonates with your audience the best. If you're running a carousel or image ad, you can work out what imagery or order of images works the best.



# Deciding on a budget

What to spend? This depends on how wide you want to reach, how quickly and what sort of results you expect to see. Determining a budget within the Facebook Ad Manager environment is sometimes best done alongside the audience targeting options – as Facebook will give you an estimate of the number of results/reach you'd expect each day. Play around with the daily budget to see how this might impact you.

## WHAT IS A NEW CUSTOMER WORTH?

Working backwards from the average value of a customer buying cover is a great way to build a view of your test budget. You can think of it like this:

All that's shown above is a customer journey in reverse. Once you know how much you're willing to spend on a successful sale as a % of your total customer value, you can work outwards to establish what sort of reach and clicks you need. Then use Facebook Ad Manager's tools to build out an audience and budget that marries up with this.



DON'T HAVE TIME FOR ANY OF THAT? GO LIGHT AND INCREASE

If you simply want to get some ads in market, pick a lifetime budget for the campaign that gets you decent coverage and then keep an eye on things like the cost per click avg., total clicks and of course leads. Once you run a test campaign you'll be able to make a more informed decision about a budget that meets your sales goals. Facebook has some useful information about minimum budgets you can [read here](#).

# How to determine if Facebook ads worked for you

FOCUS ON METRICS THAT ALIGN WITH YOUR CAMPAIGN OBJECTIVE

What was your goal? Review performance in the main screen of the Ad Manager platform.

Remember how we set up a campaign based around a marketing goal like awareness or clicks? When we come to analysing performance in the Ad Manager platform, we need to focus on how well our campaign did according to that goal. For example, getting your brand out in market you'll want to focus on things like reach and frequency (how many times your ad is viewed by the same person on average).

WHAT WAS YOUR RETURN ON AD SPEND?

If it's a lead-based goal you're working to, you can work out how much you made for every dollar spend, or a percentage return on investment (ROI) by combining the total value of your sales generated by Facebook Ads and comparing this with how much you spend on advertising. Make sure to also take other costs into account, too. If you are left with a positive result, this may be a case to broaden your advertising out and invest a bit more.

LEARN MORE ABOUT HOW YOUR ADS PERFORMED

Facebook lets you view performance at the campaign level, ad set level and by ad. It's quite useful to assess which ad did the best for engagement (likes and comments on post), clicks and even FB page likes. You can learn more about the metrics Facebook provides within Ad Manager [here](#).



# Useful resources

[How to Boost a Post](#) - Facebook

[Introduction to Ads](#) - Facebook

[Use Breakdowns to Understand Ad Performance](#) - Facebook