

How to Setup a Facebook Business Page

By Kristen Luke
September 15, 2009

Advisor Perspectives welcomes guest contributions. The views presented here do not necessarily represent those of Advisor Perspectives



Of all the popular social networking sites, Facebook is probably the least business-oriented (with the exception of MySpace, which is not an option for advisor marketing since 72% of users are under the age of 35, according to [Quantcast](#)). Most people on Facebook are there to reconnect with friends and distant relatives. For the average user, sharing pictures and anecdotes is the extent of their Facebook interaction. So the idea of using Facebook as a way to market a financial advisory firm may seem a bit farfetched.

For a long time I was skeptical about using Facebook to market anything other than name-brand consumer products. However, after hearing a couple of strong testimonials from advisors in favor of Facebook, I have changed my tune. Facebook is not a good strategy for every advisor, but it may be appropriate for advisors with strong personal and community relationships.

One way to use Facebook is to connect with your contacts using your personal profile. Using Facebook to update your personal life and interact with your “friends” will likely deepen relationships.

If this is a little too personal for you, you can setup a Facebook business page. A business page will allow you to share information with your “fans” just as you would with your “friends” through your personal profile. The difference is that information is more professional and distributed on behalf of

your business and not you personally. You will need to have a personal Facebook account to setup a business page. Once you have an account, here are some steps to setup your own basic business page:

Other Articles by Kristen Luke

[Convert Prospects to Clients through Drip Marketing](#)

[Five Ways to Cultivate Professional Referral Relationships](#)

[Make the Most of your Networking after the Event](#)

[Social Media Marketing for the Everyday Advisor](#)

[The \\$3,000 Marketing Plan](#)

[Touch Your Clients 24 Times a Year without Breaking a Sweat](#)

[Twitter Your Way to New Clients, Part One](#)

[Twitter Your Way to New Clients, Part Two](#)

[Which Social Media Tool is Right for You?](#)



Step 1: Create a Business Page

To setup a business page, log in to Facebook and then go [here](#). Fill out the requested information and then click the “Create Page” button. The next screen will take you to a blank Facebook business page.

Step 2: Insert a Logo

Move your mouse over the question mark placeholder on your business home page. A link called “Change Picture” will appear. Click the link and then choose “Upload a Picture.” Follow the instructions to upload your company logo.

Step 3: Provide a Business Description

In the left hand column, you will see a link that says “Write something about [Your Business Name].” Click on this link and include one sentence that describes your business.

Step 4: Add Business Information

Click on the “Info” tab and then click “Edit Information.” Fill out all of the fields and save the changes.

Step 5: Become a Fan

You’ll see a button that says “Become a Fan.” Click on the button and become your business page’s first fan.

(Steps 6 – 12 will require you to click the “Edit Page” link below your logo to take you to the editing page. You can edit each section by clicking the pencil in the right corner of the box.)

Step 6: Change Your Wall Settings

You’ll need to decide how you want to set your wall settings, but my suggestion is to set the “Default View for Wall” to “Only Posts by Page” and uncheck the “Fans can write or post content on the wall” box. This will eliminate any unwelcome comments on your business page.

Step 7: Remove Reviews



Remove the “Reviews” application. While I’m not a compliance expert, everything I’ve read says that accepting a testimonial of any kind is a big no-no. Avoid this compliance infraction by disabling reviews.

Step 8: Add Your Blog

If you write a blog, you’ll want to add it to your Notes tab. When you edit the Notes application, you’ll see an “Import a Blog” link. Enter your RSS feed address and your blog will automatically be posted to your business page’s Notes tab and Wall whenever a new post is added.

Step 9: Add Videos

If you have a short video (less than 20 minutes) that you would like to include, you can upload it to your business page using the “Upload Video” option in the “Video” application. You must have the file on your computer to do this, as this does not work with video sharing sites. If you have a video on a sharing site like YouTube, Vimeo or Viddler, you can post the video link directly to your business page’s wall to share with your fans.

Step 10: Add Events

If you host public events, follow the instructions on the “Events” application to add your events to your business page. You’ll have the option to choose who can view and respond to the events as well as whether you want to publicize the event on Facebook.

Step 11: Publish Your Page

Change the “Published Status” under “Settings” to “Published (publicly visible).” Once you save changes, your page will be public and searchable on Facebook.

Step 12: Get Your Badge

On the bottom right column, you’ll see the “Get your Badge” link under “Promote with Facebook Badge.” Click the link and follow the instructions to generate the HTML code so that you can include the badge on your website to promote your business page. Even if you don’t want a badge, click on this link so that you can write down the URL for your business page so that you can share the link later.

Step 13: Share with Your Facebook Contacts

Go back to your business home page. On the bottom left column, you’ll see a “Share” button. Choose the “Send a Message” tab and send a message to your Facebook contacts asking them to become a fan of your page. Fans of your business will receive



updates on their wall when you add new content to your page, allowing them to stay in contact with your business.

Facebook business pages allow you to do more than what I have outlined here. These steps are meant to help you get a basic page up and running. Once you have accomplished this, adjust your page settings and applications to your liking. Update content regularly so that you stay top-of-mind with your “fans.”

Remember that people won't automatically find your business page, so you will need to regularly promote your business page link on your email signature, website, personal Facebook page, Twitter account and LinkedIn profile as well as through your blogs, podcasts, and newsletters.

** Kristen Luke is the Principal of Wealth Management Marketing, a firm dedicated to providing marketing strategies and support for financial advisors. Kristen works with independent advisors to develop effective marketing plans and provides the back office support required to implement the strategies. For more information, visit <http://www.wealthmanagementmarketing.net>.*

www.advisorperspectives.com

For a free subscription to the Advisor Perspectives newsletter, visit:
<http://www.advisorperspectives.com/subscribers/subscribe.php>