



# cheat sheet for marketing coordinators

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## the process:

Whether it's a website, public relations or social media project, no matter the marketing or communications activity I always follow the process of Plan > Do > Review to ensure every project is working towards clearly defined goals. You should too!



To help you plan, do and review your activities across Facebook, Instagram and Email I've prepared this handy cheat sheet to help you confidently check off the foundations with confidence.

## facebook tips:

- f** Publish posts on a **Facebook Business page**, not a personal account. This will not only appear more professional but will allow your business to receive reviews/recommendations, business-specific promotional opportunities and separate personal from professional contacts and content.
- f** When doing ads through Facebook, use **Facebook Business Manager** and don't just boost posts. This will give you far more options for targeting, content delivery and give you better reporting results.
- f** When you're trying to work out how frequently to post on Facebook, choose a number that you can easily stick to. **Consistency is better than high frequency**. 3 per week is OK, 3 per day is also good, it will depend on the product/service you're selling and if you can keep up with the schedule you set.
- f** When you create ads, there are a few important factors (these tips are relevant for Facebook & Instagram ads as they are all created in the one Business Manager):
  - **Know your audience & target them.** Beyond the age, gender, business type standard demographics, go deeper so you can connect with your audience in their world and send a message that really resonates. What are their fears, frustrations and desires? What's going on in their world right now? What are they talking about or worrying about? What language/wording do they use and respond to? What key things can you say about your business to connect with your audience and offer a solution they really need? This information will help you input relevant targeting for your ad and assist with your wording of the ad.
  - **Choose the right set up for your ad.** When you create an ad on Facebook there are a couple of levels of set up to ensure you've got the right pieces in place to achieve the outcome you desire. Firstly, set up your campaign, give it a name that is unique to differentiate it from your other campaigns and relates to the content/offer/audience.

Then choose your campaign objective. This is important as it can determine how Facebook serves up your ad, how much you might pay and how the ad looks.

Objectives explained:

- **Brand awareness & Reach:** low cost to show the ad to as many people as possible but the people are less likely to take action. Good for new brands that want exposure but aren't too concerned about sales yet.
- **Traffic:** upon clicking your ad, the person is taken to a website or landing page.
- **App installs:** to promote the installation of an app
- **Video views:** sends the ad to people more likely to watch a video (you need video in your ad for this to work).
- **Lead Gen:** the action button brings up a form to complete, staying on the Facebook platform and pre-populating info.
- **Post engagement:** to get more people liking and commenting on a post. Good for causes and conversation topics.
- **Page likes:** pretty self explanatory - not really worth doing though unless you run a follow up ad targeted to people who like your page.
- **Event responses:** for promoting an event and getting people to click 'interested' or 'going' to the event. Need to have a Facebook event set up for this.
- **Messages:** sends people to chat with you via Facebook messenger.
- **Conversions:** for an action to take place on an online store or page i.e. complete a form, add to cart, complete a purchase. You must have the Facebook pixel set up and working on the site for this to be effective.
- **Catalog sales:** sends traffic to a particular catalogue and tracks completed sales.
- **Store traffic:** sends people to your online store, much like the regular traffic objective but it serves the ad to people more likely to shop online vs read an article.

**f** After you set up your campaign level structures, you move to Adset level. This is where you enter your target market information. You can have a number of ad sets within one campaign - this works well if you want to compare results across different groups or if you want to create specific content for groups i.e. different images for men Vs women, or different wording for people in different geographic location.

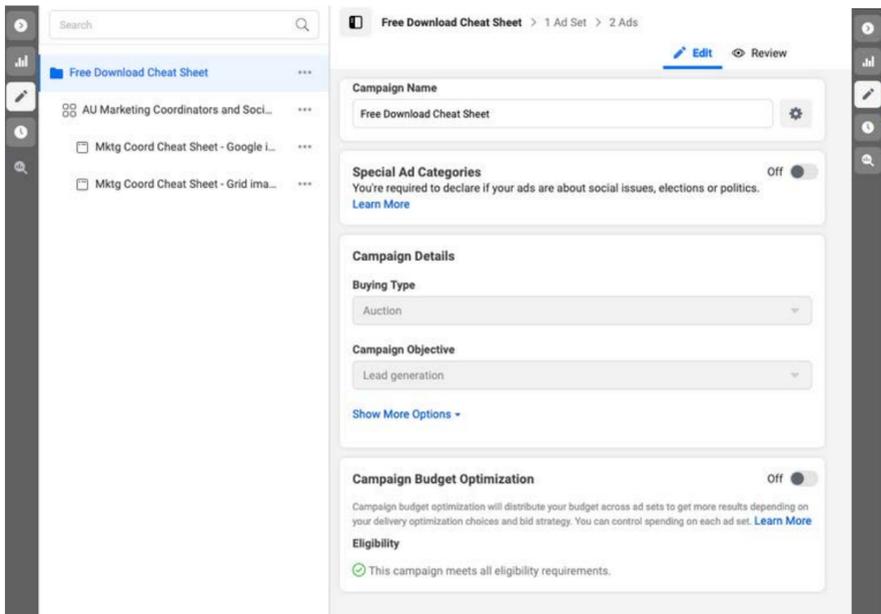
**f** At the ad level, this is where you enter the wording, links, images/videos/slideshows and call to action button to attract, engage and try to entice an action from your audience. I recommend you do 3-5 ads per ad set to test and measure different creative pieces.

**f** Once the ad, adset and campaign are set up, I generally take a screenshot and send it to my client (or you can send to your boss) to review. Get them to give the approval on the images, wording, audience and budget so that you can click 'publish' with confidence. Then it goes through a review process with Facebook and will go 'live' to the audience once approved.

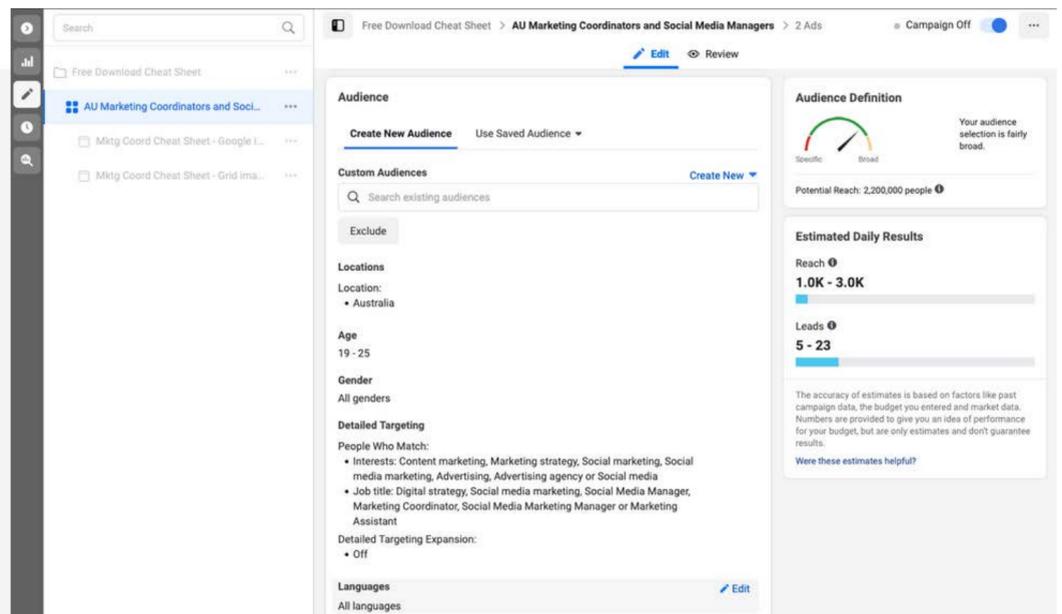
**f** Leave the ad to do its thing for a few days so that the Facebook Learning can be completed - this is where the system works out the best people to send to based on the responses gathered from the initial learning phase. If you update the ad too soon after publishing it will take longer to move out learning phase and take longer for good results to come through.

**f** **Monitoring tips:**

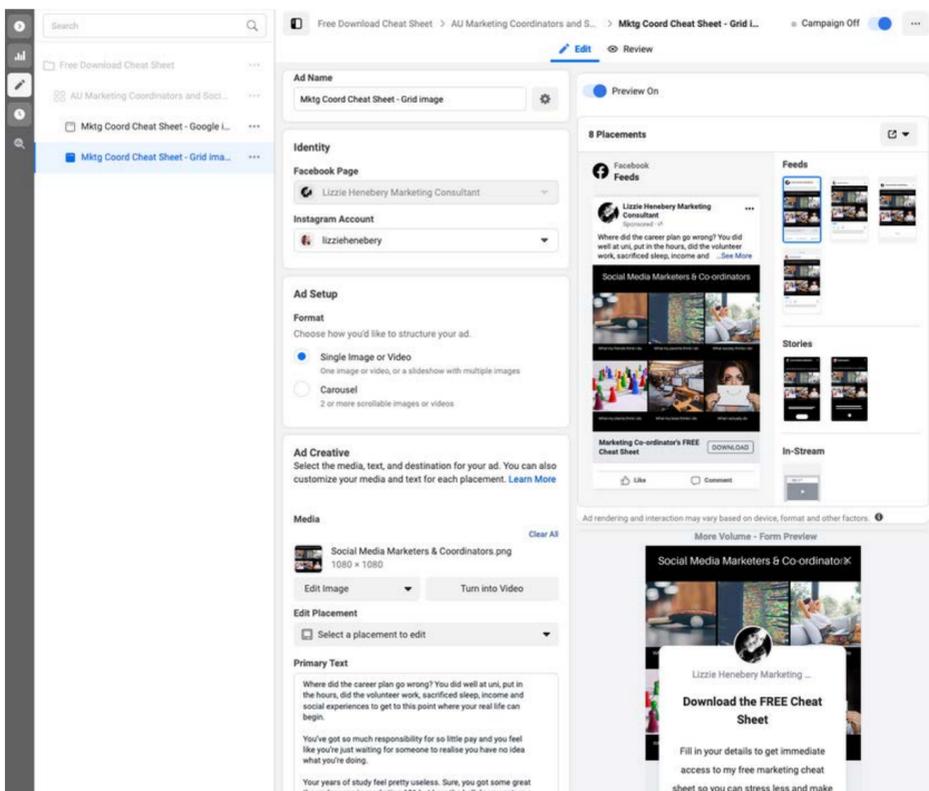
- Check on the ads every day, even if you can't update them while in learning phase. You want to make sure nothing mucks up like a credit card payment default.
- Look to see if any results are coming through and if the cost per result is increasing or decreasing (you want decreasing!)
- Make sure any leads or sales that are showing up in Facebook's reporting are actually coming through at the other end. Make sure there's no loss of leads going to an unmonitored email or that sales are actually being received and it's not just monitoring abandoned carts.



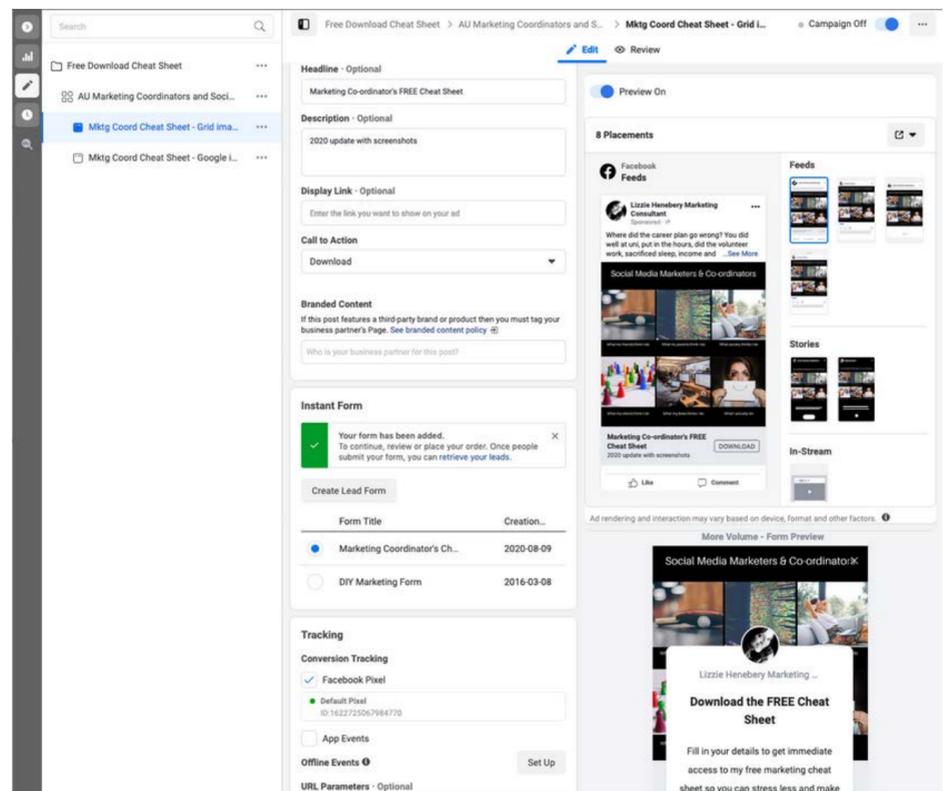
Campaign level set up showing name and objective



Ad set level set up showing the audience breakdown and that it sits in the green = good audience definition (top RHS graphic of this screenshot)



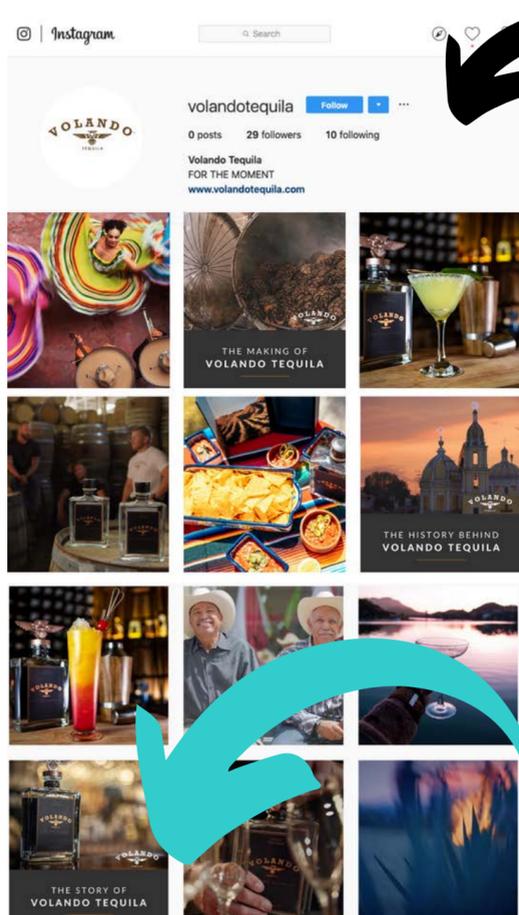
Ad level set up showing content - single image and primary text.



Ad level set up showing CTA (call to action), Lead Form and Facebook pixel check.

# Instagram tips

- 📷 Plan out your posts in a spreadsheet, working out what you want to say. Then test out what your grid will look like by placing your post images/designs in a sample grid using a scheduler program or canva. I love using canva as I can create some styled posts and test out how they'll look together before posting.
- 📷 Schedule your posts in advance using Facebook's Creator Studio or other instagram specific schedulers such as Later, Plann or Buffer. In order for the posts to properly auto schedule (and not just send you a reminder) the Instagram account needs to be converted to a business account and connected to a Facebook business page.
- 📷 Use hashtags - about 7 is a good number, you don't want a massive list as it will look disingenuous, like you're just out for likes and sales and not about quality content or community/relationship building. Be sure to add value and communicate with authenticity. The hashtags should relate to your target market, your content, your brand and any particular event or movement that you want to connect with.
- 📷 Post in the grid, on stories and on IGTV. There are so many ways to consume content on Instagram now, don't assume just by putting up a post on the grid that you've covered off that platform. Some people just view stories now, others love to explore IGTV (which is also so great if you've got longer videos you want to share. Note: the swipe up to link to a website function is only available to accounts with large followings of over 10K. If you're building up the following, do a swipe up to link to your IGTV.
- 📷 IGTV branding: you can upload videos over 1min in length and you can write nice long descriptions for them and include hashtags and links. You can upload a styled cover - be sure to keep it simple as Instagram adds extra things like video length and title over the top of your design. Once you've published your video you can edit your wording but you can't change your image (bummer I know). The image can also go straight to your grid - it's a cropped version so check to make sure it hasn't cropped something important - if it did, delete and try again.



sample grid to check  
before scheduling

IGTV cover image

IGTV cover image  
cropped and placed on  
the grid



# Email Marketing tips

- ✉ One core message per email. Don't bombard people with information in an email, they won't take it in. Keep to one clear message per email and make it obvious and easy what next step you want them to take.
- ✉ Consider a series of emails if you have a lot to say. For example, an onboarding series for new customers, a nurture series to take people from prospects to customers, a re-engagement series for past customers who haven't purchased in a while. You can map out 5 or so emails that can be sent over a week or so, each with a core message/purpose. Really consider the customer journey here and what messages, language and prompts they'll need at their particular stage in their buying cycle.
- ✉ Work on at least 3 options for your subject line before you choose a winner and send it. If you leave the subject line as an afterthought you risk no one ever seeing all the hard work you put into the body of your email because the headline might not be enticing enough for them to click on it.
- ✉ For any images you add to your email (including logos, images, graphics or gifs), make sure the file size is small so the email will be quick to load - if it takes too long your reader might give up and delete, they might not get the whole impact of your email or their email system might block the email all together. You can shrink image size without losing quality using [jpegmini.com](https://jpegmini.com) (free trial available).
- ✉ Write like you're emailing one person, not "the database" of hundreds/thousands. Make it more personal and include merge tags/personalisation tags where possible (in Mailchimp it's called a Merge Tag and looks like `*|FNAME|*`, in Active Campaign it's called 'Personalisation' and looks like `%FIRSTNAME%`). In mailchimp, you need to have selected which list you're emailing to before you're able to choose personalisation options. **Make sure you test the merge with a test email and see that the name is carrying across.** Also test it in preview mode in your email campaign system and tell it to 'enable live merge tag info' - I can't tell you how many times I've accidentally sent an email out to a database of people and everyone got "Hello Test"!!!! eek!
- ✉ Automate wherever possible. Mailchimp free versions let you have an automation with one email, and if you upgrade to a paid version you can send a series of automations. [Active Campaign](#) has various price levels and has very comprehensive automations - well worth exploring if you/your boss/your client has a budget and big focus on email.
- ✉ Always test your links! Don't assume you've copied and pasted correctly or that it automatically links. Always click all the buttons and links in your test email to make sure.

## My preferred email systems at the moment:

ActiveCampaign >

