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Marketing Plans

A marketing plan does not need to be lengthy, most likely a one-page plan is enough.

A one-page marketing plan forces you to combine your thoughts into one short, succinct document. Like the one-page business plan, the single-sheet marketing plan encourages you to focus on what really matters. It can help bring clarity to your thoughts. It can help your chapter understand and maintain a better recall of your marketing direction.

Your plan should include:

- Planned promotional activities
- Product plan
  - Differentiation of your products from competitors
- Description of your target market and member needs
- Two separate plans from products and membership

Below is a one-page marketing plan, and at the end of this document you will find a template for a longer, more comprehensive marketing plan.

Once you have your marketing plan completed you will want to ensure that everyone is on the same page. To do this you need a where your efforts can be viewed and interpreted clearly by different people within your chapter. Enter: the content calendar.

What is a Content Calendar?

A content calendar is a working document (usually in spreadsheet format) used to schedule out what you’ll post across which platforms for the month, and in more detail, the week, day, and even sometimes the time of day if need be. You can run multiple content calendars for social media marketing, email marketing, blogs, etc., or you can put them all in one place.

A well-maintained content calendar also helps keep all of your marketing efforts focused on the same goal. It allows you to view your campaigns as intertwined and working together to tell the same story so you’re able to devise a better plan of action for your overall marketing strategy, and analyze data across platforms for a better reading of your efforts and audience.

What is the importance of a content calendar?

Organization

One of the many benefits of using a calendar format to plan marketing efforts is the ability to visualize what your content strategy will look like over a period of time and stay organized across platforms. It helps you plan your marketing efforts around events or important dates in your industry or chapter and see where there may be holes in your content, and it allows plenty of time to fill those holes with relevant content that is valuable to your audience.

Viewing your content distribution schedule in a calendar format with (for example) social media and email marketing side-by-side can help you take advantage of areas of overlap between campaigns that you may have missed otherwise. Maybe a line from your email campaign would make a great tweet or Facebook post?
A content calendar is more than just a tool to help your chapter grow. It also makes your life easier when creating content by reducing the need to dig for information to create informed content. As you’re writing a social media post or scheduling the perfect day to roll out your next blog post, you’ll be able to look across your marketing efforts and make informed decisions and maintain a cohesive marketing plan. Granted, there is a lot of work involved in planning out months of content distribution, and you’ll inevitably be thrown a few curve balls along the way, but with a solid organizational system in place, you won’t go into full panic mode when it’s launch day on a new website update and you need brainstorm a quality Facebook post to promote it on the spot.

**Consistency**

Using a content calendar to plan ahead of time allows you to create a consistent flow of content that continues to build towards your ultimate marketing goals and develop a unified voice for your chapter as experts in your industry. Having the ability to plan out content for an entire year or more keeps your chapter voice consistent and makes your content a reliable source for members of your industry.

In terms of social media, would you rather follow a Twitter account that shares interesting, engaging content every day, or one that tweets four times on Monday and not at all the rest of the week? I think you know the answer to that, but remember - one of the most successful ways to grow your social following is to comment on social trends, and always have something original to say. Sometimes this actually means not planning. This seems contradictory to everything mentioned above, but with certain aspects of your marketing efforts, like social media, you have no way of predicting when major news is announced in your industry, or when you find a great way to use a trending hashtag on Twitter.

The bottom line is, content calendars are great organizational tools for short and long-term planning and goals in your marketing strategy. Just don't let that box you in too much!

Are you ready to use content calendars in your social media strategy? HubSpot has a great [free content calendar](https://app.hubspot.com/content-calendar) template to help get you started!
# One-Page Marketing Plan for CFMA Chapters

## Part 1: The Big Picture

### Your Audience

<table>
<thead>
<tr>
<th>Who are they?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do they worry about?</td>
</tr>
<tr>
<td>What do they hope for?</td>
</tr>
</tbody>
</table>

### Your Product or Service

| What is the “why” behind your product or service? |

### Your Core Marketing Message

| How will you talk about your product or service? What makes it unique, and why should people care? |

## Part 2: Your Marketing Action Plan

### Your Marketing Goal

| Set a specific marketing goal. Include the numbers you want to reach and by when. |

### Your Marketing Action Plan

| How will you reach your goal? |
| What is your budget? |
| What is your timeline? (Is there a start and end date?) |
| How will you know you’ve reached your goal? |
Social Media Toolkit

This toolkit is intended to help CFMA volunteers use social media to promote membership, chapter events, and regional conferences to current members and prospects. A small caveat - social media changes almost daily. These guidance notes will never be able to hold the most up-to-date information on setting up social media accounts, however the basic ideas and tips will hold true.

This toolkit provides tips for the channels that CFMA has found most effective based on our current demographic, which are Facebook, LinkedIn, and Twitter.

An Introduction to Social Media

What is it?
Social networks are places where people go to share information and have conversations about their interests, i.e. Facebook, Twitter, LinkedIn, forums, etc.

A social network is essentially the same as your own networks of family, friends, and colleagues, however it's on the internet. Social networking is a way of using your computer to talk to other people, exchange information, keep up with the industry, and find out about new technology and best practices.

For more information, the BBC has some basic online resources on social media: http://www.bbc.co.uk/webwise/topics/email-and-sharing/social-media.

Why do people use it?
The internet has become a more socially interactive place, where people can network and share content with one another.

The web is another place to have a conversation, like your local coffee shop, chapter event, or park, but it brings together millions of people from around the world and a wealth of information and resources to help you find what you want within seconds.

Chapters, or those representing them, can use social networking to engage with and inspire supporters, raise awareness of its work, and show that it is relevant to the wider community.

Why should CFMA volunteers use social media?
Everyday people use social media as a tool to find out information and communicate, in the same way as they would use a TV, radio, newspapers, community service, etc.

It's used for information gathering, to share news, exchange ideas, and have fun, i.e. finding out the latest industry events via Twitter; researching what people had to say about events via blogs; chatting to peers about who is planning on attending an event on LinkedIn; and posting images of that event on Facebook or Instagram afterwards.

CFMA can no longer expect people to come to them; they need to go to the members/prospects. It's the same for the chapters and whether it's via press, publicity materials, magazines, websites, or social media, we need to make sure we are communicating our work to potential and current members and those who will hopefully become members and volunteers in the future.

Social media is another way for your chapter to communicate what you do and demonstrate how construction financial professionals can get involved. It's also a very easy way for your chapter to network and raise awareness about your mission. If someone has a question about construction finance,
they will likely turn to Google to find an answer. The content that CFMA and its volunteers are putting out on social media is likely to turn up in those search results, which means more people will see that CFMA and its members have the answers that they are looking for.

If we want people to join CFMA, we need to ensure we are promoting ourselves in these places.

**Which tools to use?**

Social media is changing all the time and there are new tools being launched almost every day. It’s practically impossible and not very effective to try and use everything.

The best idea is use tools that are fairly well-established and to consider what tools the people you are trying to reach are using. For example Facebook, LinkedIn, and Twitter are very well-established and incredibly popular. By using these, you would be immediately tapping into a huge resource of information and people, plus it's fairly unlikely they will collapse and expire any time soon (a risk in social media).

CFMA is currently using Facebook, Twitter, LinkedIn, and YouTube to engage with the people about our mission and to share content such as images and information. You can see CFMA’s accounts here:

- [http://twitter.com/CFMA](http://twitter.com/CFMA)
- [https://www.linkedin.com/organization/cfma/](https://www.linkedin.com/organization/cfma/)
- [http://www.youtube.com/user/CFMAPrinceton/videos?view=1](http://www.youtube.com/user/CFMAPrinceton/videos?view=1)

**How we should communicate via social media: sharing and engaging**

It's important to remember that whilst social media is a way to communicate your message, the point of it is to enable people to share content. So it shouldn't be seen in the same way as traditional media, i.e., a place to broadcast a message. It should be seen as a facilitator for a conversation and a way to engage with people.

In the same way it wouldn't be polite to meet a new person and just blast a lot of information at them, it isn't good etiquette to broadcast information all the time on social media. For example, if you met a new person at an event, you would have a conversation, ask questions, show interest, and then perhaps talk about yourself. Ditto on social media. Find people, start conversations, share ideas, then put across your message.

**Tone of voice**

Social media is informal. It is genuine and personal. Corporate bland faceless accounts do not work well. Individuals and organizations need to be real in order to be noticed and engaged with. Your tone of voice should be light-hearted and friendly whilst remaining professional. If you are setting up an account as a chapter use the third person, to represent the whole, not just an individual.
Best times to post on social media

Facebook
- Thursday-Monday
  - 9 a.m.
  - 1 p.m.
  - 3 p.m.

Twitter
- Wednesday
  - 12 p.m.
  - 3 p.m.
  - 5 p.m.
  - 6 p.m.

LinkedIn
- Tuesday-Thursday
  - 8 a.m.
  - 12 p.m.
  - 5-6 p.m.

Instagram
- Thursday
  - 2 a.m.
  - 8-9 a.m.
  - 5 p.m.
Top 10 Tips to Being Effective on Social Media

No matter how new or experienced you are, keep these tips in mind to ensure you’re using social media effectively.

1. Consider why and how people use social media
Social media is the way the majority of people communicate: in Jan. 2019, 2.3 billion people worldwide used Facebook; 260 million users log into LinkedIn each month; 1.3 billion people used YouTube each month; and 326 million worldwide used Twitter.

Social media has changed the way that organizations and individuals communicate (like email did). Communications have become faster and more inclusive. We also know that digital is overtaking print as the place people get their news from. Social media breaks down hierarchies and enables people – members, supporters, consumers- to talk directly to one another and organizations. This can directly effect change so is very good for campaigners.

It can have both positive and negative impacts. Consider how Marks & Spencer’s learned very quickly to use social media to listen to and act on consumer feedback: http://www.retail-week.com/socialmedia-why-ms-is-listening-to-the-word-on-the-web/5008089.article.

2. Ignore the myths
There are a lot of myths about social media:

1. “It’s for kids”
   a. 78% of the people on Facebook are aged 30+ (Ofcom). Retired people are the biggest growing audience on social media.

2. “Your personal data is at risk”
   a. Exercise caution over your personal data and you won't be at any higher risk than when online banking or shopping.

3. “It’s difficult to use”
   a. It just takes a bit of time, like everything. Remember the developers of these platforms want as many people using it as possible, so it’s in their best interests to make it easy to use.

3. Social media is ever-evolving
Neither you, nor I, can ever know everything about social media. It evolves all the time, for example Facebook makes small improvements to the platform almost every day. You just need to experiment and share new learning with others. It’s a new way of learning - you can’t just read a manual and know everything.

4. Consider how you can use it on behalf of CFMA
CFMA uses social media to raise awareness about its work, to educate, and share its member’s stories. What do you want to use it for? Do you want to use it to serve information to your current members or do you want to attract new members? Do you want people to find out about your events? People search for info related to construction finance via Google, Twitter, LinkedIn and Facebook so you can reach out to those people via social media. Always consider what you want people to do in all posts. Make it easy for people to access the information – if you want them to attend an event or join your chapter give them the link to the webpage with more information.
5. Have a conversation
Social media is about conversation and sharing. When you are posting updates on Facebook, LinkedIn or Twitter you should aim for 85% “sharing” posts (i.e. re-tweeting other interesting posts, sharing industry info) and 15% “sales” posts (i.e. promoting membership or upcoming event). Imagine going to a party – you wouldn’t turn up and start talking about yourself the whole time (we hope!) so talk to people, share your experiences and ask them about theirs. Respond in a timely fashion to people (i.e. the same day if possible) and don’t be afraid to remove conversation to a private message if needs be, i.e. if it’s about personal information.

6. Share content via images, questions and hashtags
You should always be aiming to post inspiring content. Asking questions and uploading images are easy ways to engage with people and increase follows/likes. When people respond to your questions, reply and be genuine. Hashtags (#) are also another way to engage on twitter - see the guidance on hashtags in the Social Media toolkit.

7. Be personal and professional
Be friendly, informal and welcoming. Avoid abbreviations and technical language and remember not everyone knows who CFMA is. Always be professional and remember you’re representing CFMA. It’s good to have funny content, but remember that sometimes jokes can backfire! This is why people often use smiley faces such as :-) or ;-) to show they are joking.

8. Don’t panic if you make a mistake
If you do make a mistake, don’t panic. If you realize instantly (i.e. within a minute), it is okay to delete the post and do a new one. If you’re not quick enough then don’t delete the post, but do be honest, say you made a mistake and put up a new post. Then move on. Consider checks and balances to avoid mistakes, i.e. think before you tweet, switch off the work account when you’re not working, ensure people are trained properly.

9. Tailor to your audience
Think about people you may wish to target before you post anything. For example if you have been at an event with a prospect, ask if they are on Twitter and if they are get their handle and tweet them a picture afterwards and say how much you enjoyed having them. Always remember that unless you are using a private messenger, everyone can see your posts/tweets even if you just include someone’s username.

10. Build up your followers
It’s important to set time aside to research new people to follow and communicate with. Regularly share other people’s statuses on Facebook and LinkedIn and re-tweet their content on Twitter. For example you could share posts from the CFMA, other chapters, or other industry publications.
Moderating Social Media

What does this cover?
This section is meant to offer guidance to volunteers who manage social media; i.e. how to engage with users and deal with negative or abusive comments.

How to moderate
Moderators should monitor social media regularly. Engagement keeps a community enthused.

If not, monitored sites can quickly become filled with spam, offensive or negative comments and drive away the genuine user.

Effective engagement relies on transparency with the ability to ‘give up’ control, i.e. enable users to decide on discussions and choose their own direction/topic/tone. This is liberating for the user and can have huge benefits for the organization – if we get a good peer rating, that goes far further than paid-for advertising and people will remain loyal to us whilst spreading positive word of mouth.

There are also downsides – negativity, trolls, spammers and abusive commentators. More on this below.

A few basic rules on moderation:
- Always be transparent and open and try to enable healthy, open debate even if it is critical of the organization.
- Whilst abusive or offensive comments should not be tolerated, there is a difference between negative comments and abusive comments – see below.
- Spam should always be removed and repeated offenders blocked.
- Advertisements which are not part of an agreed partnership promotion should be removed, though the moderator should assess the situation and as necessary politely point the advertiser to the correct channel, or inform them advertising is not accepted on this site.
- There should be short and clear code of conduct for Facebook and LinkedIn Groups. No-one wants to read 100s of rules – a template message is included below.

How to deal with negative or critical comments
If a user is posting negative comments these should be treated with caution, but not removed. If a forum only has positive comments, genuine discussion is limited - this is definitely not the point of online forums.

Criticism helps us learn and if it is done in a constructive way then it shouldn’t be a problem. In most cases when negative comments are made, other members or users will defend the organization and a healthy debate will ensue.

The moderator should monitor negative comments, however not take action unless it threatens to dominate the entire site, in which case you need to review why people are being so critical. Is there truth in what people are saying? Perhaps this should be passed to the chapter leadership or CFMA staff to look into?

If negative commenting is inaccurate, then it is important to add content which resolves inaccuracies or adds an alternate view. Alternatively the moderator can ask a ‘friendly’ user to post a comment with a different viewpoint, or a new discussion topic.
How to deal with trolls
Unfortunately online ‘trolls’ exist. These are people who are repeatedly negative and their negativity can be at best off-putting and at worst offensive.

Often the best way to deal with trolls is to attempt to engage with them, for example if they have the wrong impression about an organization, state this in a friendly way and try to help them engage more positively. It may work – or it’s quite likely that they will continue to be rude, negative and, well, trollish!

Unless they are offensive or abusive they should not be blocked or removed. You will find in the majority of cases other (positive) members will engage with the trolls, or if you ignore them, eventually they will give up and go away.

How to deal with abusive or offensive comments
Comments that include offensive, abusive, obscene or discriminatory comments, personal attack and incitements to violence should not be tolerated under any circumstances.

If abusive or offensive comments are made, the moderator should remove the comments immediately. Most social networks will enable you to do this in an easy way, for example Facebook will give you several options: hide the post, delete the post or ban the user.

If the user offends repeatedly, or it’s obvious they are a spammer, consider blocking them, but be transparent and consistent. Never ban someone just for being critical or having a controversial opinion! Assess the comments against your code of conduct.

Code of conduct
This can be adapted as appropriate. For example on forums such as Facebook, it might only be necessary to include the first point.

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This is your space - a place to share your passion for your professional and tell us your views. In order to keep it a friendly place, we have a few guidelines on appropriate behavior. We reserve the right to remove posts and comments that violate these guidelines.

- Be polite and courteous. Offensive, abusive, obscene, or discriminatory comments, personal attack and incitements to violence will be deleted. Repeat offenders and spammers will be banned.
- Please stay on topic. Don’t add comments about something unrelated to what the original post is about.
- Provide appropriate explanatory context for posted links, photos, and videos.
- Do not solicit or market products.
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**Guidance on Using Facebook**

**What is the point of Facebook?**

It’s estimated that 68% adults have a Facebook account.

This means that no matter what walk of life you are in, or what demographic you belong to, you will find a large proportion of the people you know in real life are already interacting on Facebook. They’ll be using it daily to keep up with news from their friends and family.

The more users Facebook has, the more money it can make from advertisers so it’s developed from a social platform for students into a "hub" for people of all ages, many who will check their Facebook page throughout the day.

**How does it work?**

Facebook works by "friending" people online that you already know in the real world, or want to be connected to, by sending them a "friend request".

Once this person accepts your friend request, you can then view their profile and any items that they "post" – i.e., they may share a news article or upload photos.

When you log into Facebook, you are presented with a "news feed" of what everyone has "posted," what appears on your feed is determined by an algorithm based on who you interact with the most. Next to each item (be that a photo, video or just a couple of lines of text) you will see a little photograph of the person that posted it. If you click on that person, you will be taken to their profile page, where you can see just the items that person has posted and what information they have uploaded to their page about themselves.

**Why should CFMA chapters use it?**

Facebook allows organizations to set up an organizational or organization "page". Pages can't "friend" people on Facebook in the traditional way, instead people choose to "like" the page to then see the page’s posts in their newsfeed.

Facebook has two major uses for a CFMA chapter:

(i) **It is a quick and free way** to promote your news to your members, instead of having to wait for them to have to come to you. As the average Facebook user checks their "newsfeed" at least once a day to see what all their friends have been posting about, you can make sure your news is appearing within this, rather than having to wait for people to visit your website. For example, if in the morning you post "Don't forget we've got a chapter event starting at 7.00pm this evening", the people who like your page will see this reminder in amongst the news from all their friends whilst they are browsing their Facebook newsfeed over breakfast.

(ii) **The second main use is to attract new members.** Because Facebook is set up to be public and sociable, it is easy to attract new people to "like" your page. If you promote your Facebook page on your newsletter or website, you will soon find that people you have no direct contact with start to like your group’s page which can then be used to inform them of your programs, socials or campaigns you are running and, in time, generate new members.
Is it complicated to use?
This depends on your own experience of using the Internet. Facebook is a little more complicated than normal websites as it is interactive, and a little more complicated than Twitter as there is a lot more you can do on it. If you are not familiar with Facebook you may want to ask someone who uses it personally to sit down and show you how it works. Once you see it in action, "newsfeeds", "likes" and "shares" become easy to understand.

Over time, a number of short-hand icons and functions have developed on interactive websites such as Facebook, and website developers assume that everyone now knows what they mean - for example clicking on a cog icon usually changes something's settings, a down-arrow indicates that you can click on it to choose more options, a number in a small, red box indicates that you have a notification to read etc. If you regularly use social or interactive websites and these examples are all familiar to you, then you will find Facebook fairly intuitive.

If your experience of using the Internet is limited to just browsing information websites, then you may have to spend longer familiarizing yourself with how Facebook works. Start by setting up a personal account, get to know how it works as a user first, and get used to posting updates, adding photographs and "friending" other people you already know in the real world.

Facebook also works differently if you are using it on a smartphone or tablet - in many ways the "mobile" version is stripped-back and much simpler to use, and the "app" version you can download onto your phone integrates with it so that a notification alerts whenever anyone likes or comments on something you post.

Whatever experience you have, it is in the interest of Facebook to make their website as easy to use as possible, and anyone having spent a little time to familiarize themselves with the site will, over time, find it very simple to use on a day-to-day level.

Objectives
Facebook is a communication tool, and there is little point in setting up a Facebook page for your chapter if you are not going to regularly "post" on it. A loose strategy should be decided on for how you are going to use the page. Are you going to use it to remind people of upcoming meetings? To encourage more people to participate in your educational offerings? Are you going to use it as a recruitment tool to find other like-minded people in your area who may want to join CFMA and your chapter?

In reality you will probably want to do a mix of all of the above, but having a clear idea of what you are going to use your Facebook page for means it will be far more effective.

Audiences
The vast majority of people who will "like" your page will be individual people who are following you on Facebook because they are a construction financial professional in your area, or they are already members of your chapter.

However, your chapter's Facebook page can also "like" other organizations, and they in return can "like" you! So you may wish to find and follow other local interest groups, local organizations, industry resources, to receive their news, photos and updates - the best of which you can "share" with your own page followers.
Resource required
Facebook pages can be managed by just one person, or a number of different people to spread the workload. If you do use a number of people to manage a page, then they have to communicate with each other about who will post what kind of content and when.

There are options to pay Facebook to help build up your following, in fact if you are running a Facebook page on behalf of a chapter you will find it hard to miss these options. If you would like to know more about paying for advertising on Facebook, see Boosting or promoting posts later in this guide.

Practicalities
One criticism levelled (not unfairly) at Facebook, is that they can change their systems without notice. Facebook is a website in evolution, so whereas the instructions below were correct as of Feb. 2019, you may find they have frustratingly changed since and you need to spend a little time looking to find where the correct option has moved to.

Sometimes the easiest way to find what you are looking for on Facebook is to go to the Facebook help page https://www.facebook.com/help. You can then type in a question or search term to get a link to what you are wanting to do.

Setting up an account
You have two options on Facebook. If you already use Facebook personally, you can create a page that is affiliated with your account so that you don't have to log-out, and then log back in again as your page. This is the simplest way to set up a page, and once set up you can then invite other people you are friends with on Facebook to be administrators of this page so that they can add things to it too without having to log-out of their personal accounts.

However, you can create a completely stand-alone Facebook page, with separate usernames and password that anyone can log into to post on it, without the need of having to have a personal Facebook account.

Setting up a stand-alone page not linked to your personal account
2. If you are already logged into Facebook on your personal account, click on the drop-down arrow icon at the top right and select log-out to see the default Facebook welcome screen.
3. The page will invite you to sign-up for Facebook, and at the bottom you will see a small, separate link saying "Create a page for a celebrity, band or business". Although the page you are setting up will be for none of these, this is the link you want to click!
4. Next you will be asked what kind of page you are setting up. Choose "Organization, organization or institution".
5. Now you will be asked to choose a category for your page. We recommend simply choosing the generic "organization," unless you feel that one of the other categories better describes your group. However, you don't need to worry about this as what category you choose has no bearing on how your page works.
6. You will also be asked to enter a "organization" name. Keep this simple and give it your group's name, such as "CFMA Maryland Chapter." Consider how members of the public might search for you if they wanted to find your group on Facebook.
7. Check the box to say you agree to Facebook's terms and then click "Get Started".
8. You will now be prompted to log-in to Facebook. Instead, choose the link that says
“Create a business account.” This now gives you the option to create a "business" Facebook account, meaning that you can give anyone the username and password to be able to update the Facebook page.

9. You will also have to log-out of any personal account and log-back into this business account to update the page.

10. You will need to use an email address to sign-up for a business account, and you may want to use your chapter’s main contact email address instead of your personal one if you have one.

Setting up a page from within your own personal Facebook account
If you plan to be updating your page regularly, you may wish the Facebook page to be part of your own personal Facebook account. You can still allow other people to manage the page by adding them as page administrators, and you don't have to log-out and log back in again to update you page.

Notifications will also appear alongside your own personal notifications, meaning that you can see instantly when anything happens on your page. Outside viewers will not be able to see any of your own personal information linked with the page.

1. To set up a page from your own account, go to www.facebook.com and log in with your email address and password.

2. Go to facebook.com/pages/create

3. Click to choose a Page type.
   a. We recommend simply choosing the generic "organization", unless you feel that one of the other categories better describes your group. However, you don't need to worry about this as what category you choose has no bearing on how your page works.

4. You will also be asked to enter a "organization" name. Keep this simple and give it your group's name, such as "CFMA Maryland Chapter" and consider how members of the public will search for your group

5. Check the box to say you agree to Facebook's terms and then click "Get Started".

Starting out
Now you have created a page, Facebook may give you an animated tour of the different options open to you. If Facebook does lead you through the setup of your page by prompting you to add a profile photo etc. then it is easiest to just go with the flow and add them as it prompts you to.

If you don’t follow the prompts, the first two things you should do is to upload a profile picture and a cover image.

Finding your page
It may sound silly, but once you have made a page sometimes it’s not obvious how to get to it! If you have created a stand-alone page then it is easy, just log in and it is the only page you will see.

If you have created it from your own account, then when you log-in to your personal account, on the left sidebar you will see a new section has been added called "pages," and any pages that you manage will appear here.

Profile and cover images
Your profile image is the photograph that will be shown next to anything your page posts on
Facebook. You can change this as often as you want, but there are a few pointers to follow:

1. The image displays as a square, so pick something that works in this ratio.
2. Most people will see the image as a small thumbnail, so it needs to be something that is clear, obvious and works at a small scale.
3. The image should be recognizable - so avoid the urge to keep changing your profile photo so that people get used to seeing the same one and associate it with your group.

To upload a new profile picture, just put your mouse over the current profile picture on your page and click the option to "edit profile picture." This then gives you various options to either choose from photographs you have already uploaded or to upload a new photo from your own computer.

Your cover image is a larger banner that is shown across the top of your page. You can use this to show whatever you like, although Facebook currently requests that you don’t put more than 20% text on this image, so why not use it to show a group photo, a local landmark or ask people to send in photographs for it?

Your Page’s profile picture:
- Displays at 170x170 pixels on your Page on computers, 128x128 pixels on smartphones and 36x36 pixels on most feature phones.

Your Page’s cover photo:
- Displays at 820 pixels wide by 312 pixels tall on your Page on computers and 640 pixels wide by 360 pixels tall on smartphones.
- Must be at least 400 pixels wide and 150 pixels tall.
- Loads fastest as a sRGB JPG file that’s 851 pixels wide, 315 pixels tall and less than 100 kilobytes.
- For profile pictures and cover photos with your logo or text, you may get a better result by using a PNG file.

Keep in mind that your Page’s profile picture will be cropped to a circular shape in ads and posts, but will remain the same square shape when people visit your Page.

To preview what your Page’s profile picture will look when cropped, please see the example below.

Example

Before

After
Publishing your page
Before anyone can see your page, you need to publish it. Once you’ve added a profile picture, updated the "about" information and uploaded a cover image, select "publish this page" which should be shown in a banner across the top of any page that hasn't yet been published.

Note that very few things you do on Facebook are permanent, so if you are not sure if a profile photo will work, or you don't know if you have put information about your organization in the right place - don't worry about it too much! You can always go back and edit things, and remember that Facebook's help center (www.facebook.com/help) will cover how to do most things on your page.

Starting to post
Now you've got a page up and running, the fun can start.

Either log into your page if set up as a stand-alone account...

Or if you have set up the page from your own account you will need to follow the steps below, please note you'll need to be an admin, editor or moderator to like or comment as your Page on another Page's post. If you're an admin or editor, you may be able to publish as your Page on another Page's timeline, depending on that Page's settings.

To like or comment on another Page's post as your Page:
- Go to the Page post you want to like or comment on
- Click your profile picture in the bottom-right corner of the post
- Select the Page you want to like or comment as
- Like or comment on the post

To publish on another Page's timeline as your Page:
- Go to the Page you want to publish on
- Click your profile picture in the top right corner of the posting box
- Select the Page you want to publish as
- Create your post, then click Post

Note: Keep in mind that a person's profile isn't the same thing as a Page, which can represent chapters, businesses, or causes. While you can publish, like or comment as your Page on another Page, you can't do the same thing on a person's profile.

Once you are at your new page, you want to look for the "status" box. In this box you can write a message to appear to your page's followers, paste a link to an article or website, or upload a photograph. Every time you do one of these things, it will be shown to the people who like your page, and also a copy will be posted onto your page's wall so people can see everything you've posted historically. Click the "post" button once you have composed your update to make it go live.

If someone likes what you have posted, they may show their approval by clicking the little "thumbs-up" icon on the post in their newsfeed, which is called a "like." However, Facebook has an entire series of reactions which are an extension of the Like Button to give people more ways to share their reaction to a post in a quick and easy way. The collection of Reactions includes Like, Love, Haha, Wow, Sad, and Angry.
Or they may even add a comment or reply to what you post by typing in the box underneath the post (note you can also reply to their comment as long as you are signed-in as your page). They can also "share" what you have posted with their own friends, which is shown by a little "document" icon with a folded corner on it.

Experiment with posting different types of messages, images and links and see how they appear. In the early days you will have very few people following your page, so don't worry about getting it wrong as you can always delete things later if you need to. To delete a post, click on the ellipsis in the top right corner. This will then display a drop-down menu giving you options for this post, of which one of them is "delete from page."

Getting people to like your page

Building up a page following is very important, and can get quite addictive! Logging in and finding that another person has liked your page is always exciting, even if you have a page with hundreds or thousands of followers.

The number of people who currently "like" your page (and so can see what you post) is shown on the community menu on the left under your profile image.
The easiest way to get people to like your page, is to tell them to! When you first create a page, the address of the page (so the bit at the top of the browser that starts www.facebook.com/pages/...) will be a horrible long string of numbers, but you can still copy this and paste it into an email so that people can copy it into their own browsers and visit your page. People should be able to enter the name of your page in the search box to find it also.

Email everyone in your chapter, tell them that you have a new Facebook page and ask them to go to it and "like" it if they are on Facebook. Also ask them to post a link on their own personal Facebook pages suggesting to their friends that they also "like" your new page. If you use Facebook personally yourself, do the same. The chance is that a large proportion of your own friends will have similar interests to you and be happy to like the new page.

On your chapter website make sure you put a link to your Facebook page on it. Consider asking the person who runs your website if they can add a Facebook “activity box” to the site. This box shows visitors to your website a miniature, stripped-back version of your page which includes all your latest posts and has a link to "like" the page direct from your website.

If you have a newsletter, tell people that you have a new Facebook page and give them a reason to follow it - such as "get reminders for upcoming event and latest industry information."

When logged-in as your page, search for and "like" other related pages. You can then comment on their posts under the guise of your page, meaning that visitors to their pages will be able to click on that comment and see your page too.

When you find interesting links, repost these on your chapter’s Facebook page, adding your own comment and recommend that people share it themselves. When someone shares your Facebook page's link, it will show that it was shared via your page and so advertise it to a wider audience.

**Tips for using Facebook effectively**

You need to develop a rhythm to posting on Facebook for two reasons. The first is that Facebook does not show all your posts to everyone who follows your chapter. This can be frustrating, but Facebook has an algorithm to work out which people see your posts by gauging how "interesting" you and your posts are.
It does this by first showing you post only to a small percentage of your followers and seeing if they click the like button, follow a link, re-share the content or add a comment to it. If your post generates some interactivity, it will then show it to more people. If it gets no interactivity it will show it to less. Facebook is also more likely to show your post to people who have liked and commented on your posts before, so you need to post a variety of content knowing that only a percentage of your followers will see each post.

Although this can be maddening, Facebook argues it is necessary. As well as having a couple of hundred friends on the site, Facebook users can also follow hundreds of pages – if it simply showed you everything that everyone posts you would drown in status updates.

You can see how successful your posts are by going to your chapter’s Facebook page (logged-in as your chapter) and look at the posts. On every post at the bottom you will see how many people it reached, how many engagements (Reactions, Comments, Shares, and Link Clicks) it received as well as who Reacted to your post.

At the top you will see a section called "Insights." Here you can see statistics about the age-range, gender and location of your page's followers - as well as which posts performed the best and what time of day your page followers are most active on Facebook. You can view data by today, yesterday, last 7 days, or last 28 days.
Posting more of the kind of posts that proved most successful, alongside making them appear at a time of day when people are active on Facebook (usually early morning, lunch-time and late afternoon) means that more people will see more of what you post.

You should be aiming to post on your chapter’s Facebook page at least a couple of times a week. Don’t post a lot of irrelevant information or Facebook will downgrade you for being "uninteresting" so make sure you only post items that will be of genuine, specialist interest to your group even if that means posting less. To ensure you know what to post and when we recommend creating a social media calendar with your posts and content mapped out.

### How to Post on Facebook

#### Scheduling

Of course, you may simply not have the time to post during the week - or be at your computer at the right time of day - so this is where a handy little function called scheduling comes in. Scheduling allows you to write posts for your Facebook page in advance, and then set a date and a time when you want them to be published.

This means that if you only have spare time on a weekend, you can spend an hour stacking-up your posts to be released at pre-set times during the week. It also means that if you have something that you regularly post, for example a reminder about a regular monthly meeting, or you know in advance what education your chapter will be offering and want to publicize them in the week leading up to them, you can set these posts up weeks, or even months in advance and set them to show only at the appropriate time.

To schedule a post to show in the future, instead of immediately, go to your chapter’s Facebook page (logged-in as your group) and type your status update and when you are done click on the ellipsis. A drop-down with several options will appear (feel free to use these for your posts, they are just different ways to create content) at the very bottom select the “Share Now” drop-drop and then click on “Schedule”. This lets you pick a date and a time when you want your post to appear. This can be later the same day, or in the future.
Once you have done this, the button that usually says "Share Now" will now say "Schedule Post" instead. Click it, and your post is saved. You can see all scheduled posts on your page, see highlighted section below.

Editing a Post
If you need to make an edit to a post you can do so by clicking the ellipsis in the upper right corner of that post and then click edit post. The will open the post so you can edit the text, once you are finished click “Submit.”

New Posting and Scheduling Option: Creator Studio
Creator Studio brings together all the tools you need to effectively post, manage, monetize and measure content across all your Pages. Creator Studio also helps you take advantage of new features and monetization opportunities that you may be eligible for.
Creator Studio helps you:

Manage your content
Get details, see insights and take actions on any piece of content from any of your Pages. Learn more about the content library.

Track performance
See how your content is performing, get metrics on your estimated earnings and discover advanced insights about your audience across all your Pages. Learn more about insights in Creator Studio.

Streamline engagement
Manage interactions across all your Pages. Includes Facebook Messenger and post comments, as well as Instagram comments. Learn more about the Creator Studio inbox.

Simplify publishing
Compose, schedule and publish content across multiple Pages that you administer or have publishing access to. You can also bulk upload videos to a single Page. Learn how to post content in Creator Studio.

Monetize your videos
Onboard eligible Pages to ad breaks, check your monetization status, manage block lists, get insights, edit your payout settings and view statements. Learn more about monetizing your content in Creator Studio.

Protect your content
Control where and how your original content appears with Rights Manager. Learn more about Rights Manager in Creator Studio.

Add free music and sounds
Review and download royalty free music and sounds for your videos using Sound Collection. Learn more about using the Sound Collection.

So, what do I post?
You can post whatever you like, but, as with all publishing comes responsibility. Remember that Facebook is a public forum: whatever you post is now part of the Internet and reflects your chapter and CFMA. As such, you should always aim to be positive, inclusive, informative and educational.

Start with posting about your chapter such as reminders of events, details of upcoming program, and photographs from your meetings or of your members. If you have the "Facebook" app on your smartphone you can even post photographs live from your events. Posts like this are great: images always get a better response than just text and it shows your members what they are missing out on, encouraging them to come to future programs and events.

You should also make wider posts about CFMA in general. Remember a portion of your page's followers will not be CFMA members - so keep an eye on the CFMA website www.cfma.org and Facebook page (https://www.facebook.com/ConstructionFinancialManagementAssociation) for news about deadlines, upcoming events and recent success stories and don't be afraid to repost them. You can also point out the benefits of joining CFMA and how we help the industry.
Sharing industry news is also a great way to find interesting things to post. Don't just put a link to the news story; add in a comment of your own about the story and how it affects your chapter or your members. Note - if you copy and paste a website address into the status update box, Facebook will automatically make this into a little description, also pulling in a photograph from the page if it can find one. Once it has done this successfully, you can then delete the actual link that you just pasted in and write your own comment instead, but Facebook will still retain the link it has created. You can also edit the automated blurb Facebook pulls through to describe that website.

Finally, start asking your members for contributions. A successful "template" post is to ask your members what is keeping them up at night this week to start a discussion.

**Boosting or promoting posts**
Throughout using Facebook you will see constant options to "Boost" a post or promote your page. Boosting a post lets you pay Facebook to put your post in the newsfeed of not just everyone who follows your page (instead of a percentage), but also on your target audience’s newsfeeds (you can set the demographics).

So - should you do it? Facebook offers a lot of different routes for paid advertising, and you should consider it in the same way that you would pay for any advertising for your chapter (such as in newspapers etc.). We won’t go into the options for advertising on Facebook here, but you should be aware that the opportunity is there, as many Facebook pages are initially built on the back of paid Facebook posts.

If you want to dig a little deeper, go to your chapter’s Facebook page (signed in as your chapter) and in the bottom right hand under each post is the option to "boost" or promote it. Clicking on this button will show you the projected statistics for paying to have this post inserted into people's newsfeeds. It will give you an estimated reach and also options for selecting different budgets.

Advertising in Facebook is always budget-led, so once your promotion reaches the maximum budget you have selected it will stop. You can play around with different budgets, and see that for pages with fewer followers you might be able to promote your page to several thousand people for less than $10.

**Security**
One question that is often raised by people who don't use Facebook is about how secure and private it is. The media haven't helped by sensationalizing stories about people's accounts getting hacked and personal details stolen. The reality is that a lot of money goes into making Facebook secure, but it is part of the Internet and by default "public."

You can make your chapter page a private "invite-only" page, but it will seriously hamper the number of people you will attract to your page and mean that people won't be able to find your page by themselves. It rather defeats the object of “social” media.

As with all online accounts, you should keep your password safe and secure. Instead of using a simple password, use random numbers and letters – of if you need to make it something that people can remember, use a system where you have both capital letters, and replace some letters with numbers such as CFM4M4$$Ch$pt3r.
If you find that someone is posting as you on Facebook, or you think someone has got into your account, simply changing the password will stop them. It is rare that this happens, and when it does it can usually be traced back to a virus on your own computer that has captured your password as you have entered it – so keeping your computer virus checker up to date and running regular weekly scans will prevent this.
A Guide to Using Twitter

Why should CFMA chapters use it?
Twitter is designed to share information and have conversations with likeminded people. It’s perfect for CFMA because we can share our knowledge about the industry. People use Twitter for real voices and real views, so we can let our passion for helping construction financial professionals shine through and allow people to tap directly into our activity, i.e. chat about industry best practices, or new technology.

Is it complicated to use?
Not at all. It really is simple to use, once you understand the basic concepts. You do need to think about a few things before you start using it though.

Firstly, think about why you are using it. Don’t bog yourself down in rules or strategies, but consider the objective of Twitter as you would any particular communication channel. Who you want to communicate with and what you want to achieve from it? This will help you to set up your account details much more easily and who to follow. See the Objectives section for more on this.

Secondly, the point of Twitter is that people can make real-time updates and have an online conversation. This means that people can be tweeting regularly, up to many times a day. They want to have regular conversations with you and won’t wait at your convenience. You shouldn’t use it if you are only going to use it intermittently, nor should you use it only when wanting to post something about the chapter. It’s about conversations so check messages and reply to people who have started conversations with you. See the Tips for how to use Twitter effectively section for more.

Finally, there is very little privacy on Twitter! Everyone can see your tweets - always bear this in mind. Even if you reply to a tweet from an individual, this will appear in your live feed. If you need to contact someone privately make sure you use the ‘direct message’ option. Think of Twitter the same way you would think of any public forum or media tool – it is no different from making a statement to the national press or on the radio, in fact many journalists use Twitter to find material for their news stories and will see this as an official view from the organization.

Objectives
Twitter is a communication tool like any other, and you should think about why you want to use it in the same way you would when considering using any channel - be it a press release, magazine article, web story, newsletter article, etc.

Do you want to use it as a networking tool? For example you may be a chapter leader who wishes to connect up with other chapter leaders to share ideas and tips.

Or do you want to use Twitter as a marketing tool to promote your upcoming events and programs?

Or do you want to use it as a campaigning tool to raise awareness about CFMA and the valuable resources that they (and your chapter) offer?
Audiences
These depend on the objectives. If you want to network, then your audiences are like-minded people. If you want to market your activity you will be wishing to target those construction financial professionals in your area.

Resource
All of the above takes resource. So remember that whilst it is free and straight-forward to use, it still needs considerable effort to use it well, i.e. resource in terms of time, personnel/manpower and planning processes... you might want to identify a key person who has that time to give to manage the account.

The Practicalities
Start off by reading Twitter’s own guide – the basics will cover most of what you need as a new user: https://support.Twitter.com

Setting up an account
Follow Twitter’s instructions which will take you through the process step by step. It will suggest followers and explain everything to you.

When you set up your Twitter account use CFMA’s official chapter information and the material you have used on your website; you don't need to reinvent the wheel.

As soon as you set up an account tweet @CFMA to say hello, so we can add you to our chapter list and you can start networking with other chapters.

Username/ Twitter handle @
Use a name which other people will immediately understand, i.e. CFMAMASS or CFMAIndiana. Think about how people might search for you if they were looking for you on Twitter.

Also try to keep it short. Twitter has a character limit and you don't want to make it harder for other people to re-tweet your information when your name takes up half the tweet!

Bio and image
For your profile photo use your CFMA chapter logo and for the header photo upload a friendly image which represents your chapter or area, for example members at an event or a photo of your city. It's off-putting not to use an image.

- Profile Photo
  - Square Image recommended 400 x 400 pixels.
  - Maximum file size 2 MB.
  - Image types include: JPG, GIF, or PNG.
- Header Photo
  - Recommended 1,500 x 500 pixels.
  - Maximum file size of 5 MB.
  - Image types include: JPG, GIF, or PNG.

Make sure you put in your bio that you are part of @CFMA and a bit about your chapter. At the very least add a link to your chapter website in the bio.
Twitter's menu:
ME: A place where you manage your account and profile
CONNECT: A place where you manage the conversations you have with people
DISCOVER: A place where you discover new people and conversations
HOME: A place where you manage your feed – i.e. the messages from all your followers updating by the minute

Starting to tweet
1. Follow @CFMA
2. Retweet (RT) the @CFMA tweets and any other tweets you find interesting.
3. Search other people and learn from them. Follow people who you find interesting and who may share CFMA’s views/interests. In all likelihood they will then start following you. Have a look at other organizations’ public lists to identify like-minded followers.
4. Have a look at the way other people tweet and learn from them – you will soon find your own voice. It’s best to make your tweets interesting and relevant to you, i.e. personal, not just bland referrals to websites or news reports. As a chapter try to tweet in the third person, i.e. use ‘we’ instead of ‘I’, unless you are tweeting as an individual chapter leader or volunteer.
5. Remember that you are representing your local chapter. Don’t use it as a soapbox to pursue your own agenda – you can set up your own non CFMA Twitter account for that! The views on your CFMA chapter Twitter account will be seen as official CFMA views, so if stick to topics that are CFMA agreed policies and themes that would interest potential new members to your chapter, as identified in your objectives.
6. Start having conversations with people – i.e. direct a tweet to them – either by replying to one of their tweets which you like, or by tweeting them something you think they might find interesting. Tailor these tweets though, don’t spam people. For example if someone uploads an image from an industry event, tweet them with as compliment of the photo and ask them that their most interesting takeaway was. Once you start chatting you could highlight your chapter’s upcoming event or your website. Remember the tweet will appear in your live feed and will be seen by all your followers.

Tips for How to Use Twitter Effectively

Have conversations with people
Social media was not designed to be a one-way street, so don’t just broadcast messages. The whole point is to share and have a conversation with people. This means people will very quickly filter out what they perceive as sales pitches or advertising and anything too formal in tone. Talk as if you are talking to a friend, although remember to remain professional as you are representing an organization.

When you are saying something which you think other people will be interested in, or you want to promote a CFMA story then include the usernames of these people in your tweet. They will hopefully retweet you to their followers, thus increasing exposure and potentially increasing your followers.
Be responsive
If someone asks you a question try to answer it. At the very least point them to @CFMA or the CFMA website. Your way to success is to engage with people. Check your private messages (Direct Messages) as people will contact you that way when they don’t want the conversation to be public.

Be open and engaging
Try to use language that does not assume any prior knowledge and be concise.

Don’t use “BC”, use “Budgetary Control”

Direct people to a website
Remember that in most cases you are using Twitter to get someone to take an action, be it from the low-key conversing with you on a networking basis, to the higher level action, such as attending an event or becoming a member. It is therefore important to include website URLs if you want someone to do something – give them the pertinent info and then point them to the website for more info.

For example the tweet below is an excellent way of highlighting an upcoming event:

New to the #construction industry? As you will quickly come to find construction financial professional have a unique set of challenges. The Basics of Construction #Accounting course will help get you up to speed in no time!

... but it would have been even better had there been a link to the details as there is a higher chance of people visiting the website and actually attending the event:

New to the #construction industry? As you will quickly come to find construction financial professional have a unique set of challenges. The Basics of Construction #Accounting course will help get you up to speed in no time! Register now >> <insert URL>.

Hashtags #
You’ll note in the example above that there are words with a hashtag (#) in front of them. These are the way in which Twitter files content. Often people will search for a keyword and the hashtag is used as a way to sort this information.

What are hashtags?
The # symbol, called a hashtag on social media, is used to mark keywords or topics in a tweet. It was created organically by Twitter users as a way to categorize messages but is also used to highlight and join conversations about a topic. It’s worthwhile including these as a way of reaching out to new people – i.e. if you add #construction to one of your tweets, when people search for that, your tweet will be highlighted

Think about how much more powerful your tweets could be if you added hashtags to some of your tweets – lots more people will see these tweets, not just your followers.

Read more: https://support.twitter.com/entries/49309-what-are-hashtags-symbols

Using a tool like RiteTag (http://ritetag.com) is perfect for gauging interest in hashtags on Twitter. You can search for an industry hashtag to see how popular it is, and compare it to top related hashtags.
Top tips when using hashtags

- **Limit your tweets to two hashtags**
  Using up to two hashtags within your tweets can actually double your engagement. However, using more than two hashtags can actually decrease engagement, so maximize your hashtag use at just one or two.

- **Keep it brief (max 15 characters).**
  We’ll need to be able to include some blurb, a URL and the #. Plus if it’s too long and convoluted, it’s also easy to misspell.

- **What is its purpose?**
  It’s needs to be clear to more than just CFMA members about why the # exists and why someone might want to use it to join a conversation. People should understand what it’s about immediately i.e. #Education or #CFMAconf. It’s pointless using it if it’s internally focused.

- **Check if it’s already being used.**
  It is OK to use a # already in use, if it is already established and is related to how you want to use it, i.e. #education. However ensure it is not controversial which could backfire! Ideally, you’d want to come up with your own as you want people to join your conversation not someone else’s – and it’s easier to monitor stats.

- **Use it as part of a sentence**
  Ideally it should be something that can be incorporated into sentences and not just stuck on at the end i.e. Join us at our next #CFMA #Philly meeting to learn about what’s on the horizon for the #construction industry.

- **Aim for lower case**
  Lower case/upper case is irrelevant although it ends up being lower case most of the time, so best to have something that reads OK in lowercase.

Sharing images and words
Images are very popular. Consider posting images from events to either get people sharing their event photos, talking the event, or attending your next event. Alternatively posting images of your city, local sports teams, gifs etc., make people smile and comment. This at the very least raises your profile and makes a user have an emotional reaction – hopefully a good one!

People love quotes
Check out #quote. It’s sometimes worthwhile to share a motivational quote particularly if it resonates with your own passion, however use them strategically as otherwise it’s annoying. People want to hear your views, not read quotes all the time. Make them pertinent.

Automatic feeds
Don’t set up automatic feeds to individuals unless you know and trust what they tweet. You can set up automatic feeds to other chapter tweeters within CFMA.
Spam and hacking
Spammers exist, so take care. There are a lot of fake accounts pushing unidentifiable links which can give you viruses or take you to undesirable websites. However spammers are not that intelligent and pretty easy to spot! They use very similar techniques, i.e. a message saying ‘OMG I can’t believe you shared this video of me” and a link to a website. Easy rule of thumb – if you don’t know the recipient or the website, don’t click the link! Delete it and if you think it is spam then block the account.

Sometimes people will get hacked which means the spammer is using their account to send spam – in this instance, don’t block the person if you know they are genuine, just message them to say they have been hacked. They will then take the necessary steps. Messaging them will not hack you – you can only be hacked if you follow a dodgy link.

If you are hacked and someone tells you that you are sending spam, do not close down your account. Usually just changing your password will resolve the issue. See Twitter’s @spam for more advice.

Terminology
Tweet: The term used to refer to a post, i.e. Jenny is going to tweet about our event; Jenny tweeted about the event last night.

RT: Retweet is a term used for when someone wants to share someone else’s tweet – there is a mechanism within Twitter that allows you to do this, which is somewhat like forwarding an email.

MT: Modified Tweet – when you wish to re-tweet someone’s tweet but add some more info of your own on

Tweeps / Tweeter: People who use Twitter

@: The @ handle is someone’s username i.e. @CFMA

#: Hashtags are a way of people organizing information. They can be used to attract new followers, highlight an issue or track engagement with an event i.e. #Learning #Construction #Accounting #Finance

DM: Direct Message, aka Private Message. Represented by the little envelope, the message also shows blue and says it is a Private Message which means it will not appear in your public feed.

Other Resources
Twitter’s help guide: https://support.Twitter.com/

Best practices: https://www.marketingdigibook.com/blog/twitter-best-practices

Find out how to use lists: https://help.twitter.com/en/using-twitter/twitter-lists
LinkedIn Guidance

As of Aug. 2018 LinkedIn had 562 million users, LinkedIn is all about building networks and connections. It’s not only about who you know, but about who your connections know.

That’s the real power of LinkedIn for business: the ability to tap into existing connections and grow your chapter through word-of-mouth. It’s also the top-rated social network for lead generation.

If your LinkedIn marketing strategy is limited to a personal profile—especially one with an out-of-date, bare-bones resume—it’s time to up your game. You need a detailed Organization Page if you want to grow your audience and drive results.

In fact, according to insights provided to Hootsuite from LinkedIn, completed Organization Pages generally receive twice as many visitors than those with incomplete pages. And organizations that post at least monthly generally gain followers six times faster than those that don’t.

How to set up a LinkedIn Organization Page

A Organization Page helps LinkedIn members learn about your chapter and are a great way to establish industry expertise. For example, Hootsuite’s LinkedIn page has more than 190,000 followers tuned in to the valuable and timely content we share—and that’s not including the 1.3 million people that follow CEO Ryan Holmes’ thought leadership articles.

LinkedIn Organization Pages used to be viewed primarily as HR landing pages for chapters. Though this is still one way to use LinkedIn, the network is also becoming the perfect place to drive results, raise chapter awareness, promote career opportunities, and educate potential customers on your products and services. Rich content and compelling status updates can help to establish your chapter as a leader in your industry.

Here’s how to set up a LinkedIn Organization Page for your chapter. Note that if you don’t have an existing personal LinkedIn profile, you’ll need to set one up before creating a page for your organization. If you don’t have a LinkedIn profile yet, set one up by following our detailed instructions and return to this post once you’re done. Organizations with complete information get 30% more weekly views.

Step 1. Add your organization

Head to the LinkedIn Marketing Solutions portal for creating Organization Pages and click the big blue Create an Organization Page button.

Enter your official organization name and choose the URL that people will use to find your chapter on LinkedIn. You can’t change this URL later, so choose wisely. Click the box indicating that you have the right to act on behalf of your organization, then click Create page.

LinkedIn automatically creates the shell of your Organization Page. All you have to do is start filling in the details. In the welcome pop-up box, click Get Started.

Step 2. Add a cover image and logo

Choose a cover image to capture the feel of your chapter. The image should be 1536 x 768 pixels.

Since LinkedIn is a professional network, your organization logo takes the place of your profile picture on other social networks. Your logo also appears on your employees’ LinkedIn profiles. Use a square logo sized to 300 x 300 pixels.
Don’t skip this step! LinkedIn data shows that organizations with logos get six times more traffic to their Organization Pages.

**Step 3. Create an organization description**
You have 2,000 characters to describe what your organization does, and why potential followers should care. This is important text, so get your marketing and content teams involved in crafting your messaging.

The first 156 characters are especially important, as that’s what will appear in the Google preview of your organization page.

Underneath your organization description, you can add up to 20 organization specialties. These act as tags or keywords that will help people find your chapter on LinkedIn, so don’t skip this detail. Make sure your organization’s various products, services, and strengths are well represented here.

Not sure what you should include? Try some social listening to get a sense of what words people are already using to talk about you and your industry online. Think about this from your customers’ point of view.

**Step 4. Fill in your organization details**
Enter your chapter’s website URL. You’ll then provide your organization details using several drop-down menus that indicate your industry, organization size, and organization type (public, non-profit, educational, and so on), and enter the year your organization was founded.

You’ll also need to provide at least one location for your chapter.

If you already belong to some relevant LinkedIn Groups that you’d like to feature on your organization page, you can enter them in the appropriate section here. Otherwise, you can leave this field blank for now.

**Step 5. Publish your page**
Click the Publish button and your Organization Page will go live.

Before going any further, click the Go to member view button at the top right of the page to see what your Organization Page looks like to others. If you’re happy with your page, great! If not, click Manage page and make any tweaks necessary to get it looking just right.

**Step 6. Add page administrators**
You don’t need to be in this alone. LinkedIn allows you to choose which employees can administer your page.

To add team members, click the Me icon at the top of your LinkedIn Page, then choose your organization page under the Manage section.

Click Admin tools at the top right, then select Page admins. Add your team members by name. You must already be connected with them on LinkedIn to add them as page administrators.

Click Save changes to finish setting up your team.
Step 7. Optimize, optimize, optimize

Now that you’ve set up your LinkedIn Organization Page, it’s time to make sure it’s performing at its full potential. A few quick polishes, summarized in the video below, will ensure your Organization Page follows best practices and looks as professional as possible.

How to create a LinkedIn marketing strategy

Setting up an organization page is simple—but don’t let that lull you into slapping something together without a LinkedIn for business strategy to maximize your page’s benefits. Rather than simply racking up followers and connections, think about how you can use LinkedIn marketing tools to uncover new opportunities to grow.

Start by developing SMART goals. SMART goals are specific, measurable, attainable, relevant, and time-bound. After all, you’ll never know whether you achieve your goals if you don’t take the time to set goals in the first place. LinkedIn can support chapter in many ways, so you need to determine exactly what you want to get out of your LinkedIn efforts. Are you trying to build a network for social selling? Establish yourself as a thought leader? Recruit new members?

Whether you want to tackle all of these aspects or focus on only one, you need to create goals to help you work toward a target, then understand how your efforts are paying off.

Keep in mind that even if you’re new to using LinkedIn for business, you can gain a lot of useful intelligence for goal-setting and strategic planning by examining who’s already connecting with you—and how—on your other social channels.

If you haven’t yet developed audience personas, this is a great time to do so, as knowing who you’re trying to target is key to crafting the right message. If you’re using LinkedIn for recruiting, be sure to consider employees’ and candidates’ needs as well.

Share content that matters

Organizations that post weekly see a 2x lift in engagement with their content.

Always try to include an image, link or video in your posts. Images generally result in a 2x higher comment rate. Custom image collages (3-4 custom images in one post) perform especially well for organizations.

Get inspired with Content Suggestions

Content Suggestions help you discover trending topics and articles to share with target audiences. Simply select your audience, explore what’s trending, and share selected articles.

Highlight the best of your chapter

Volunteers typically have 10x the social reach of their organization. Share your members’ best posts on LinkedIn, and leverage their networks and their voice to build a connection to your chapter. You can also share your best member mentions on LinkedIn.

Expand your chapter with a Showcase Page

Showcase Pages are a great way to highlight the opportunities or initiatives within your chapter. Create a Showcase Page to share unique content and create memorable experiences with your members.

Learn more about Showcase Pages
[Insert Organization Name] Marketing Plan
For
[Year] – [Year]
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Executive Summary

Your mission statement should answer the following question:

- All the different products and services your team offers
- How long your organization has been running
- An introduction to your marketing team
- The structure of your marketing team
- Any additional team members that your marketing team works with either instead the organization or freelancers
- The mission statement of your chapter
- Your main marketing objectives and tactics

Mission Statement

Channel Selection:

Social Channels:

a. 

b. 

c. 

d. 

e.

Blog hosting platforms:

Email publishing platforms:

Website and landing page platforms:

Goals

Awareness:
Consideration:

Purchase:

Loyalty:

Advocacy:

SWOT Analysis

Strengths:

Weaknesses:

Opportunities:

Threats:

Competitor Analysis

Competitor One:
Channels Utilized:
Voice and Tone:
Tactics:

Competitor Two:
Channels Utilized:
Voice and Tone:
Tactics:

Competitor Three:
Channels Utilized:
Voice and Tone:
Tactics:

**Competitor Four:**
- Channels Utilized:
- Voice and Tone:
- Tactics:

**Competitor Five:**
- Channels Utilized:
- Voice and Tone:
- Tactics:

**Audience Persona**

**Biography**
- Name:
- Workplace:
- Job Description:

**Demographics**
- Age:
- Gender:
- Income Level:
- Level of Education:
- Location:
  - Rural
  - Suburban
  - Urban

**Hobbies & Interests**
- Hobby 1:
- Hobby 2:
Interest 1:
Interest 2:

**Challenges & Goals**
Describe:

**Personal Summary**
How would your target customer or audience describe themselves?

**Values & Fears**
What your audience expects from your service:

Common concerns that prevent them from converting:

**Favorite Blogs & News Sources**
List 5-10 popular sources for your demographic:

**Customer Quote**
Add a real quote from a real customer that your persona might say:
Project Breakdown:

January

February

March

April

May

June

July

August

September

October

November

December

Budget:

Budget for social media:

Budget for email marketing:

Budget for website/blog:
Budget for video:

Budget for PPC:

Budget for display advertising:

Promotion Strategy

Content Types:

a.

b.

c.

d.

e.

Promotional Templates

1.

2.

3.

4.

5.

Measuring Success

Goal One:

Metric to be measured:

Goal:

Goal Two:

Metric to be measured:

Goal:
Goal Three:
    Metric to be measured:
    Goal:

Goal Four:
    Metric to be measured:
    Goal:

Goal Five:
    Metric to be measured:
    Goal:

Goal Six:
    Metric to be measured:
    Goal:

Goal Seven:
    Metric to be measured:
    Goal:

Goal Eight:
    Metric to be measured:
    Goal:
Sample Social Media Plan for Events

This sample plan is meant to help chapters and regional conference task forces create their social media plan for events. The task force will be responsible for creating and executing this plan.

Event Name:

Event Date & Time:

Social Media Manager (the volunteer managing your social media efforts):

Event goals for social and mission statement:

Event Hashtag:

<table>
<thead>
<tr>
<th>Pre-Event Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Create timeline for event promotions and announcements</td>
</tr>
<tr>
<td>☐ Create graphics for social media</td>
</tr>
<tr>
<td>☐ Designate social media tactical volunteers to post and engage with your social channels</td>
</tr>
<tr>
<td>☐ Find a volunteer or hire a photographer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pre-Event Social</th>
</tr>
</thead>
</table>

**Facebook**

☐ One post per week
☐ Create one boosted post (paid ad on Facebook) 60-days out
☐ Create a Facebook Event

**Twitter**

☐ 1-2 tweets per day
☐ Keep track of who is coming by creating a list, including all keynotes, partners, and members who will be attending [https://help.twitter.com/en/using-twitter/twitter-lists](https://help.twitter.com/en/using-twitter/twitter-lists)

**LinkedIn**

☐ 2-3 posts per week
☐ Participate in relevant LinkedIn conversations around event
### During Event Social

- Interview attendees, customers, speakers, for blog and/or social content

**Facebook**
- 1 post with photo per day

**Twitter**
- 10-12 posts per day live from the event
- Tweet out presentations at the start of each session (if you have a session)
- Monitor event hashtag and mentions
- Retweet and reply back to interesting points and questions from attendees
- Encourage volunteers who are attending the event to engage by posting updates, photos, and retweeting as well

**LinkedIn**
- 1 post per day recapping the day

### Post Event

- Post-event content assessment: videos uploaded to YouTube, photos posted to Flickr or similar photo hosting site
- Measure the buzz with www.hashtracking.com
- Sum up the best tweets with https://wakelet.com

**Blog**
- Wrap up blog post about event

**Social Networks**
- Connect with and thank attendees
- Promote follow-up materials

This toolkit is created to help regional conference task forces create their social media plan and to help activate volunteers, sponsors, and attendees so they will help to get the word out about your conference on social media. The task force will be responsible for creating and executing this plan.

Please read through this entire document and update the sections that have <insert...> with the information that is relevant to your conference.
**Social Media Best Practices for Conferences**

**Please read through this entire document and update the sections that have <insert...> with the information that is relevant to your conference.**

- Encourage all chapters and volunteers post at least once a week on Twitter and LinkedIn.
- Make sure all of your posts end with a clear call to action (learn more, register now, see the full conference lineup, etc.) and include the link to the conference site.
- **Hashtags**
  - Use an official hashtag
    - Using the official hashtag is a best practice that helps attendees easily find our posts. Monitoring the hashtag on social media also allows you to discover what other attendees are up to and excited about leading up to and during the event. Lastly, it provides a window into the event for users unable to physically attend the event this year.
    - Keep it short
      - CFMA + your event name + year (optional)
        - i.e. Southwest Regional Conference = cfmaswconf or cfmaswconf19
  - Hashtag guidelines
    - Twitter: No more than two hashtags per tweet
    - Facebook: No hashtags
    - Instagram: No more than two hashtags in the body of the post, up to 15 hashtags in the first comment on the post
    - LinkedIn: No more than one hashtag per update
    - Pinterest: Up to five hashtags
- Create a Facebook Event

**Message to speakers, sponsors, or attendees**

We need your help to get the word out about this year’s <insert conference name>. Please consider letting others know about this great event by posting about it on your Twitter, LinkedIn, Instagram, or Facebook accounts. Feel free to use the samples posts below or write your own. Also, don’t forget to follow us on Twitter <insert twitter handle>, like us on Facebook <insert link to your Facebook page>, and follow on LinkedIn <insert link to your LinkedIn page>.
Sample posts

Speakers
- I’m speaking at <insert twitter handle or conference name> #<insert hashtag> 2019! Make sure you check out my session <insert link to session or conference>
- Register now to join me at <insert twitter handle or conference name> #<insert hashtag>. Don’t forget to attend my session on <insert date and time of your session and link to the conference>
- I can’t wait to speak at <insert twitter handle or conference name> #<insert hashtag> in <insert city>! Join me as I discuss <insert topic> on <insert date and time of your session>. Register now at <link to the conference>

Sponsor
- Proud to support <insert twitter handle or conference name> #<insert hashtag> in <insert city>! Learn more: <insert link to the conference>
- We’re excited to be a sponsor at <insert hashtag> in <insert city on <insert date>! Learn more here>> <link to conference>
- We’ll be at <insert twitter handle or conference name> #<insert hashtag> in <insert city> on <insert date>, will you?! Learn more: <insert link to the conference>

Attendees
- Counting down until <insert twitter handle or conference name> #<insert hashtag> in <insert city>! Join me by registering now>> <insert link to the conference>
- Can’t wait to be in <insert city> for <insert twitter handle or conference name> #<insert hashtag> Come experience the fun with me! <insert link to the conference>
- Register now for <insert twitter handle or conference name> #<insert hashtag> – I’ll be there! <insert link to the conference>
- Looking forward to hearing <insert speaker name> present at this year’s <insert conference name> #<insert hashtag> on <insert date>. Learn more, at <insert link to the conference>
- I’m headed to <insert city> for #<insert hashtag>! Looking forward to discovering new ideas, broadening my knowledge, and exchanging ideas with other CFMs. Want to come along? Visit <insert link to the conference>
- Network, network, network! The <insert conference name> provides a great opportunity to network with CFMs. Walk away with new contacts and insights for the year ahead. Register now >> <insert link to conference>

Reasons to attend:
- Learn firsthand from construction financial management leaders
- Hear about best practices for construction financial managers
- Network with other local CFMs from a variety of industry sectors
- Build friendships with local CFMs
- Energize yourself with a room full of like-minded individuals looking to share ideas and information