



# Social Media Primer: Maximizing Lead Capture with Facebook

Step-By-Step Guide to Using Tools from the Facebook Custom Audience Tool Suite

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**How to Use this Guide**

This resource describes the step-by-step process of creating custom audiences from Facebook’s Custom Audience suite of five tools. The guide focuses on the following three tools: 1) Standard Custom Audiences, 2) Website Custom Audiences, and 3) Lookalike Audiences.

The intended users of this guide are enrollment management teams and marketing and communications teams adapting to changing dynamics within independent school recruitment.



# Understanding the Basics of Facebook Custom Audiences

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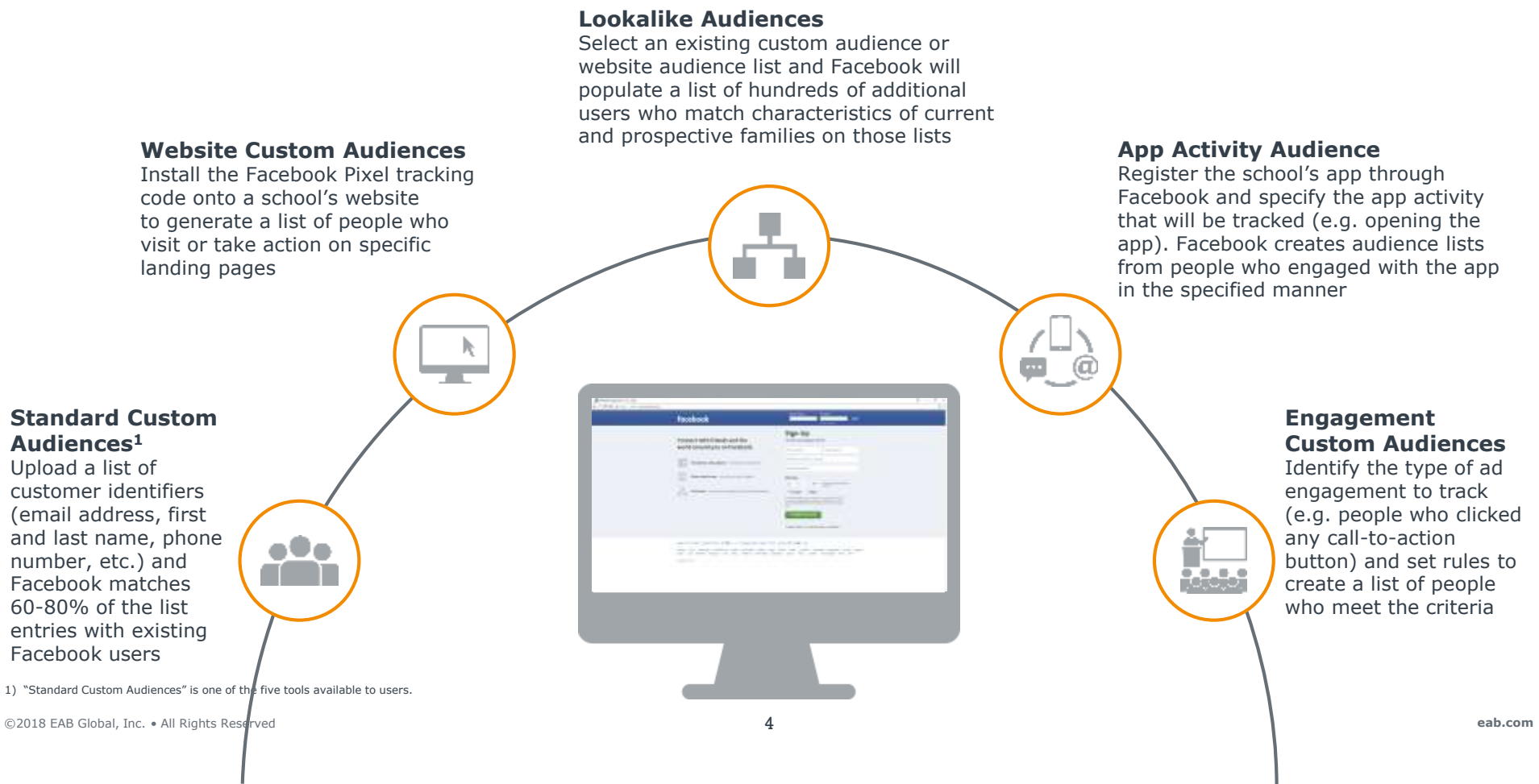
SECTION

1

# What is the Facebook Custom Audience Suite of Tools?

**Facebook Custom Audiences is a suite of tools used individually or in tandem to target ads to specific groups of people. Ads are sent to the target group identified using their contact information, behaviors, and characteristics. Admissions offices can use Custom Audience tools to identify and connect with prospective mission-aligned families.**

## Facebook Custom Audience Tool Suite



# Why Use Facebook Custom Audiences?

## A CASE IN POINT



Berklee College of Music in Boston, Massachusetts, is the largest independent college for undergraduate and graduate students studying contemporary music. Berklee College wanted to increase both the number of competitive applicants of undergraduate and graduate students and registration for summer programs. They used Facebook Custom Audiences to accomplish both these goals.

40%

Increase in the click-through rate for undergraduate campaign

Standard Custom Audience used to prompt prospective students who had started an application with a call to action to complete the application

10%

Increase in summer program enrollment

Custom Audience used to send ads to specific potential summer program students based on an acquired list purchased from a third party vendor

Lookalike Audience used to target new summer school students based on the previous year's students

12x

The conversion rate for Music Therapy graduate program

Custom Audience used to target ads to a list of qualified music therapists purchased from a third party vendor

Lookalike Audience used to expand ad campaign to a larger qualified pool of program candidates

## Major Reasons to Use Facebook Custom Audiences



### Expand Enrollment Funnel

Connect with families unfamiliar with independent school option, increase reach of marketing efforts



### Move Prospects Through the Funnel

Send ads to specific families, prompting them to take next steps in the application process with calls-to-action

# Which Facebook Custom Audiences Are Right for Your School?

## Determine the Right Custom Audience to Meet Your Goals

The assessment below is designed to help you identify the most useful Custom Audience tools to begin expanding your enrollment funnel with Facebook.

**Step 1:** Read each admissions goal listed in the second column of the table.

**Step 2:** Place an "X" to the left of each goal that is relevant to your school.

**Step 2:** Move across the table horizontally to determine the Custom Audience tool you should use to meet these goals.  
The page number for the start of the step-by-step guide for each Custom Audience tool is listed beneath the column headers.

Relevant to my school?	Admissions Team Goals	Standard Custom Audience <i>Page 7</i>	Website Custom Audience <i>Page 12</i>	Lookalike Audience* <i>Page 18</i>
	Generate leads	✓	✓	✓
	Drive traffic to your website	✓	✓	
	Connect with "stealth prospects" <sup>1</sup>		✓	
	Convert inquiries into applicants	✓		
	Identify more families within your target market			✓

1) EAB's Community College Executive Forum defines "stealth prospects" as potential families who are essentially invisible to your marketing staff because they independently research your school without ever inquiring for more information



# How to Create Standard Custom Audiences

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SECTION

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# How to Create Standard Custom Audiences

## Formatting Customer Lists for Upload

Before you can create a standard custom audience, you will need to properly format parent information for upload. Files containing parent information must be uploaded as .csv or txt files. To ensure parent information is correctly transferred into Facebook, use the column headers that adhere to the Facebook general best practices listed out below. For more information on creating a customer list and troubleshooting tips, consult Facebook's [General Best Practices Guide](#).

### Column Headers for Facebook Auto-Detection

Data Type	Column Header	Example
Email	email	<ul style="list-style-type: none"><li>username@hotmail.com</li><li>your.name@gmail.com</li></ul>
Phone Number	phone	<ul style="list-style-type: none"><li>1-234-567-4321</li><li>+44 845 412 7003</li></ul>
First Name	fn	<ul style="list-style-type: none"><li>James</li><li>T.</li></ul>
Last Name	ln	<ul style="list-style-type: none"><li>Johnson</li><li>Jones-Smith</li></ul>
Zip/Postal Code	zip	<ul style="list-style-type: none"><li>20037</li><li>20037-1435</li></ul>
City	ct	<ul style="list-style-type: none"><li>Richmond</li><li>Washington</li></ul>
State	st	<ul style="list-style-type: none"><li>MD</li><li>Maryland</li></ul>
Country	country	<ul style="list-style-type: none"><li>US</li><li>FR</li></ul>
Gender	gen	<ul style="list-style-type: none"><li>M</li><li>F</li></ul>
Date of Birth	dob	<ul style="list-style-type: none"><li>MM-DD-YY</li><li>MM/DD/YY</li><li>MMDDYY</li></ul>

### Data Entry Tips for Formatting Customer Files

- Save your customer list file in a .csv or txt file format to upload onto Facebook
- Use the Facebook-provided column headers for easy Facebook recognition
- Include as many customer identifiers as possible to increase the match potential between your customer and the correct Facebook user
- Separate first and last names of customers into two columns
- Always include each customer's country code as a part of the customer phone number, and include the country of each customer in a separate column (Facebook is matching your customers on a global scale)

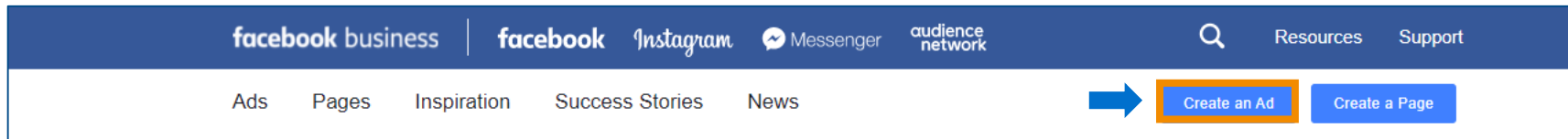
Facebook Business, [https://www.facebook.com/business/help/606443329504150?helpref=faq\\_content](https://www.facebook.com/business/help/606443329504150?helpref=faq_content)



# How to Create Standard Custom Audiences

The following pages contain step-by-step instructions and illustrations for creating a standard custom audience. You will need your formatted customer list to complete this process.

1. To begin, go to **www.facebook.com/business** and click the **Create an Ad** button.

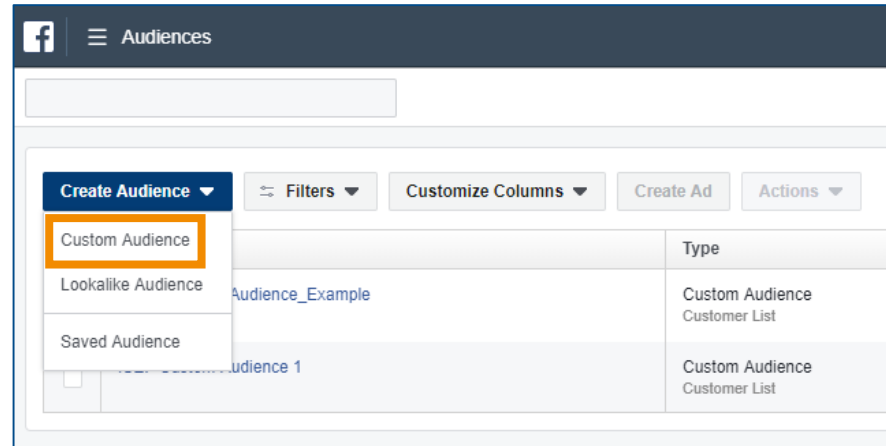


2. Select **Ads Manager** to view the drop-down menu items. Click **Audiences** under the **Assets** column.

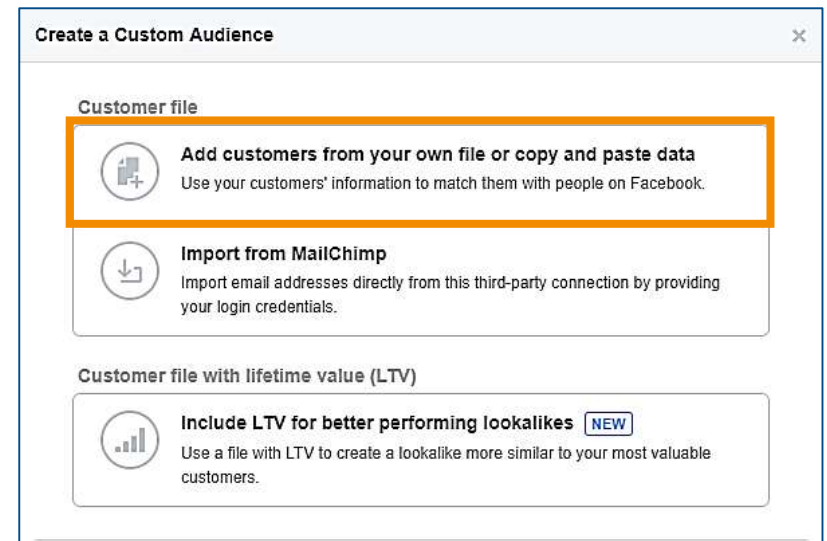
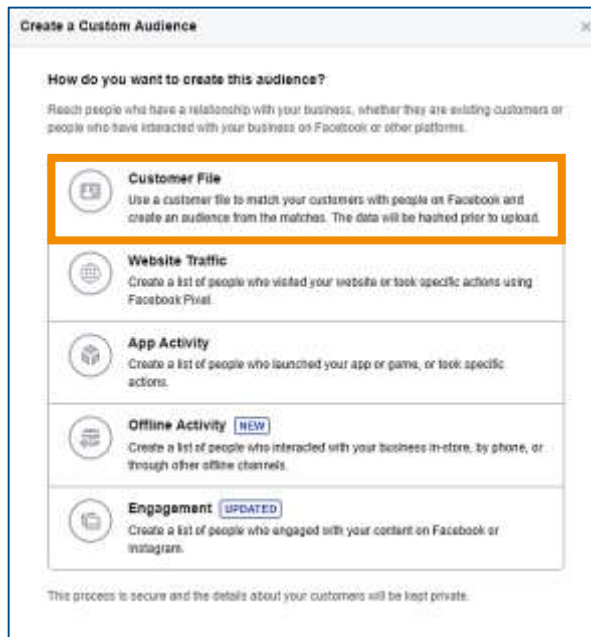


# How to Create Standard Custom Audiences

3. Select the **Create Audience** drop-down, and click **Custom Audience**.



4. A pop-up will appear. Select **Customer File**, then click **Add customers from your own file or copy and paste data**.



# How-To Create Standard Custom Audiences

5. Click **Upload File** and select your customer list.

The screenshot shows the 'Create a Custom Audience' dialog box with a progress bar at the top indicating four steps: 1. Add Customer List (active), 2. Edit Data Mapping, 3. Hashed Upload & Creation, and 4. Next Steps. The main heading is 'Prepare a file with your customer data' with a link 'How to prepare your data'. Below this, it lists 'Identifiers you can use (15)' with a list of input fields: Email, Phone Number, Mobile Advertiser ID, First Name, Last Name, ZIP/Postal Code, City, State/Province, Country, Date of Birth, Year of Birth, Gender, Age, Facebook App User ID, and Facebook Page User ID. There are two main options: 'Add a new file (CSV or TXT)' and 'Copy and paste'. The 'Add a new file' option is selected, showing a dashed box for file upload with the text 'Drag and drop your file here or' and an 'Upload File' button highlighted with a blue arrow. A 'Download file template' link is also present. At the bottom, there is an 'Audience name' field with the placeholder 'Name your audience', a character count '50', and a 'Show description' link. 'Cancel', 'Back', and 'Next' buttons are at the bottom.

6. Verify your entries have been properly mapped with the green checkmark symbol next to each data type. Then, select **Upload & Create**.

The screenshot shows the 'Create a Custom Audience' dialog box at Step 2: Edit Data Mapping. The progress bar at the top shows Step 2 is active. The heading is 'Preview and map your identifiers' with a sub-note 'Map your data to upload it. Your data will be hashed before it's uploaded. Learn more'. Below this is a table mapping data from the uploaded file to Facebook identifiers. The table has two columns: 'Identifiers' and 'Map'. The 'Identifiers' column lists: Country, First Name, Last Name, Email, and Gender. The 'Map' column shows the corresponding data from the file with green checkmarks indicating successful mapping. At the bottom, it says '5 columns are mapped and will be uploaded' and lists the mapped fields: Country, First Name, Last Name, Email, and Gender. There are 'Cancel', 'Back', and 'Upload & Create' buttons. A blue arrow points to the 'Upload & Create' button.

## Data Mapping Icons

In **Step 6**, look for the following icons to troubleshoot issues with data entry:

- ✓ Data is properly matched for upload
- ! Facebook is unsure of the type of data entered
- ⚠ Date is identified by the format is not supported



# How to Create Website Custom Audiences

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SECTION

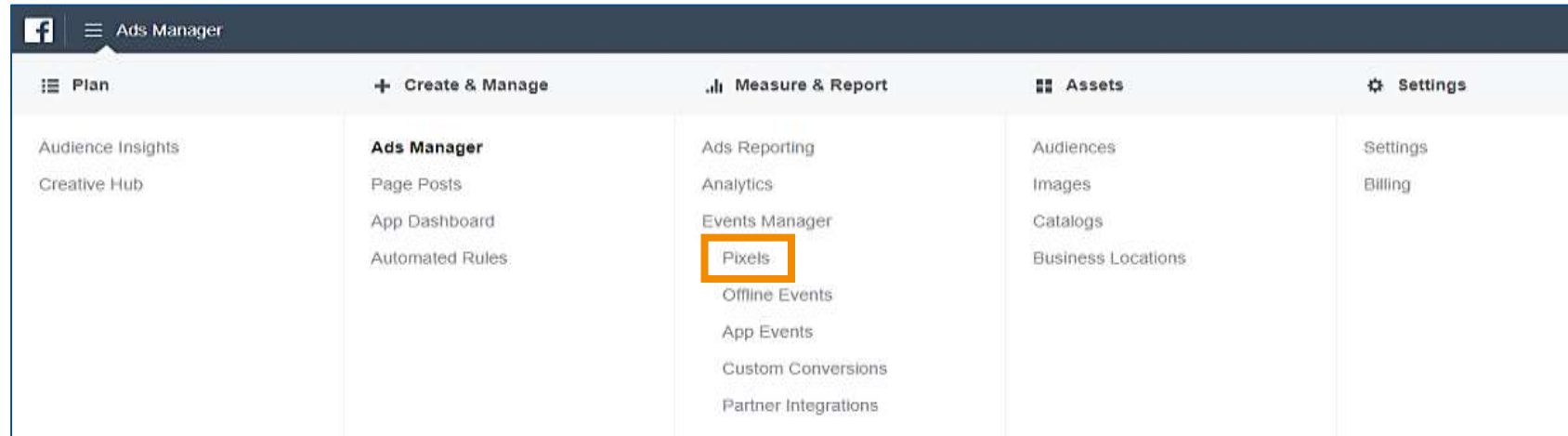
3

# How to Create Website Custom Audiences

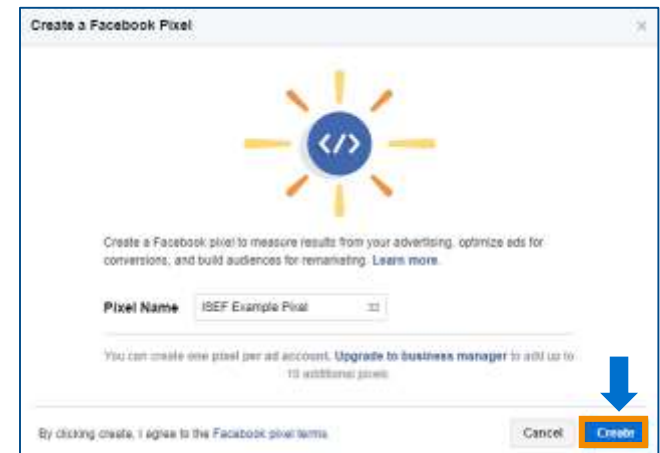
## Part 1: How to Create a Facebook Pixel

To use Website Custom Audiences, you must add a Facebook Pixel tracking code to the webpages you want to track. The following steps describe how to install the pixel.

1. Select **"Ads Manager"** to view the drop-down menu items. Click **"Pixels"** under the **"Measure & Report"** column

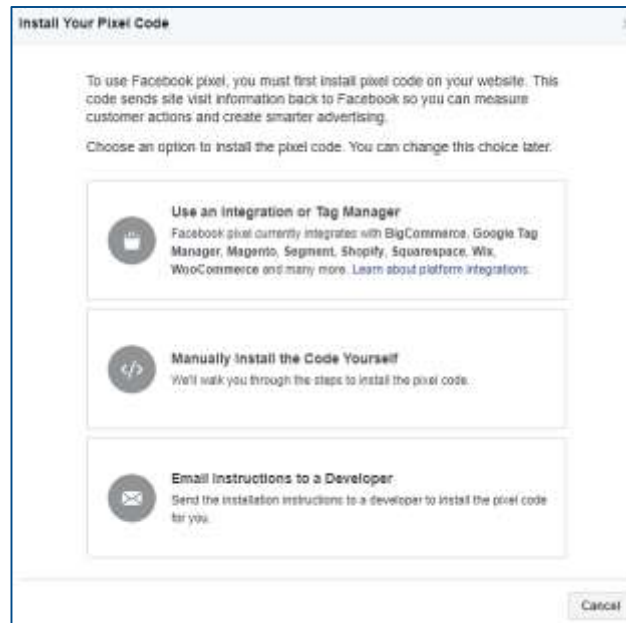


2. Click **"Create a Pixel"** to begin. A pop-up box will appear. Enter a name for your Pixel to internally identify the information it is tracking and click **"Create."** (Note: Each ad account is granted one pixel. To add up to 10 additional pixels, you must upgrade to a [business account](https://www.facebook.com/business) if you have not already done so.)

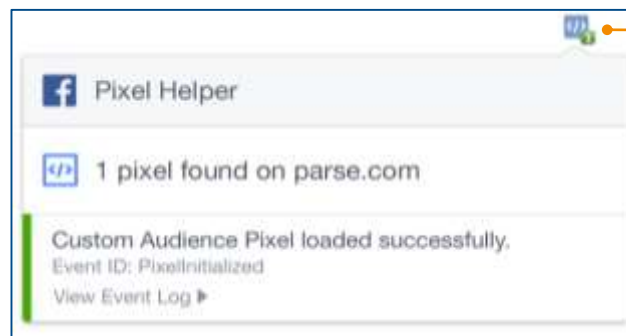


# How to Create Website Custom Audiences

3. Install your pixel code on your website using an integration system or have your website developer add it. More information on uploading and troubleshooting the Facebook Pixel can be found on the Use [Facebook Pixel Help Center](#).



4. Facebook suggests downloading the Pixel Helper to verify that the Pixel is properly downloaded and to help troubleshoot any pixel errors.



The Pixel Helper is a Google Chrome plugin used to validate that the pixel is installed correctly. To use the Website Audience tool, the Facebook pixel must be embedded to track customer actions and engagement. The Pixel Helper can be downloaded from the [Facebook Pixel Help Center](#).

# How to Create Website Custom Audiences

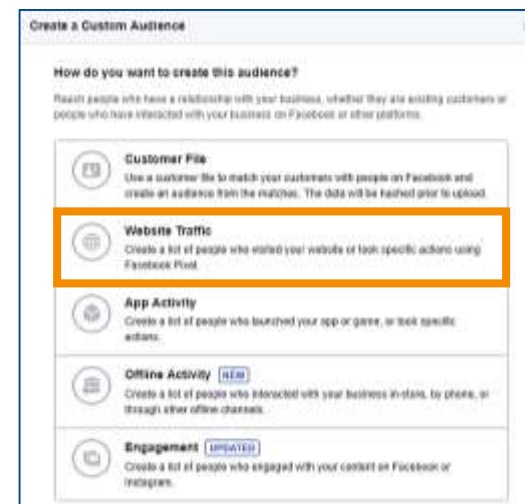
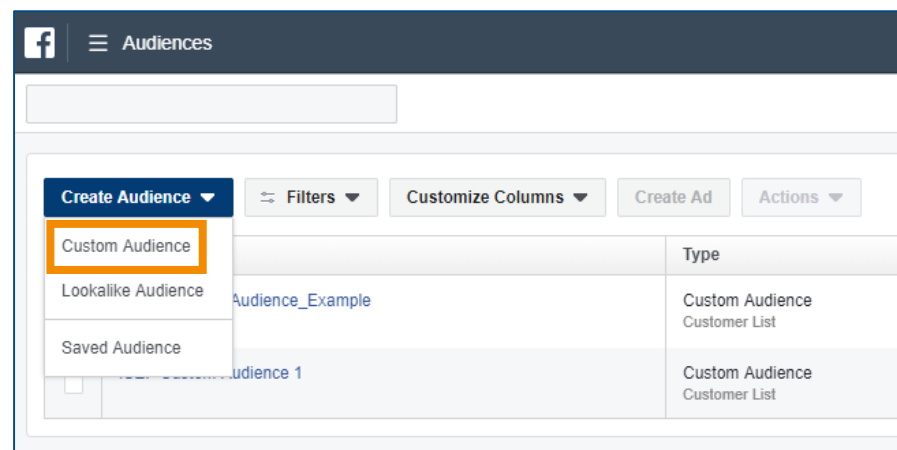
## Part 2: How to Create Website Audience Custom Audiences

Once the Facebook Pixel is installed, you can generate Website Custom Audiences. The following steps show how to set up Website Custom Audiences, which will create lists of people who visited your tracked webpages based on a set of rules you create.

1. Select **Ads Manager** to view the drop-down menu items. Click **Audiences** under the **Assets** column.



2. Select the **Create Audience** drop-down, click **Custom Audience**. Under the **Create a Custom Audience** pop-up, select **Website Traffic**.



Facebook Business, <https://developers.facebook.com/docs/facebook-pixel/pixel-helper>

# How to Create Website Custom Audiences

3. A pop-up box will appear. Create parameters for Facebook to use when compiling a list of website visitors. For example, include people who meet **ALL** of the following criteria. Then click **Create Audience**.

The screenshot shows the 'Create a Custom Audience' dialog box. It is titled 'Create a Custom Audience' and has a close button (X) in the top right corner. The main section is 'Include people who meet ALL of the following criteria:'. Below this, there are two criteria sections. The first section is 'ISEF's Pixel' and contains a dropdown menu 'People who visited specific web pages' with a value of '30' days. Below this is a 'URL' dropdown with 'contains' selected, and a text input field containing 'eab.com/isef'. There is a '+ And also' link below this. The second section is 'Refine By:' and contains a 'Frequency' dropdown with 'is greater than or equal to (>=)' selected and a value of '2'. Below this is a 'Device' dropdown with 'All Mobile Devices' selected. There is a '+ And' link between the two criteria sections. The third section is 'ISEF's Pixel' and contains a dropdown menu 'Visitors by time spent' with 'Top 25 %' selected, and a value of '30' days. Below this is a '+ Select specific web page(s)' link. At the bottom right of the dialog, there are two links: 'Further narrow' and 'Exclude'. At the bottom of the dialog, there is an 'Audience name' field with 'ISEF Prospects' and a 'Show description' link. There are three buttons at the bottom: 'Cancel', 'Back', and 'Create Audience'. A blue arrow points to the 'Create Audience' button.

Include people who either complete "ANY" or "ALL" of the specified actions.

Choose to include either **all people who visited your website**, or only **people who visited specific web pages**.

To limit your Website Custom Audience to people who visited specific landing pages, enter the URL of those specific pages. Then use the **contains** drop-down menu to create an inclusive or exclusive formula model with the options **contains**, **doesn't contain**, or **equals**.

Create additional parameters for your website visitors to be included in your custom audience (e.g. **visitors by time spent**).

Select a time limit within which to identify visitors. The maximum number of days to set is 180.

Click the **Further refine by** link to continue narrowing your criteria. Select the **Frequency** option and set parameters to indicate how often an event should happen to be included in the audience.

Click the **Further refine by** link again and select **Device**. Select the type of device you want to pull people from (for example **all mobile devices**).

Click the **Exclude** link to omit people from your audience who do not fall into your target market segment.





# How to Create Lookalike Audiences

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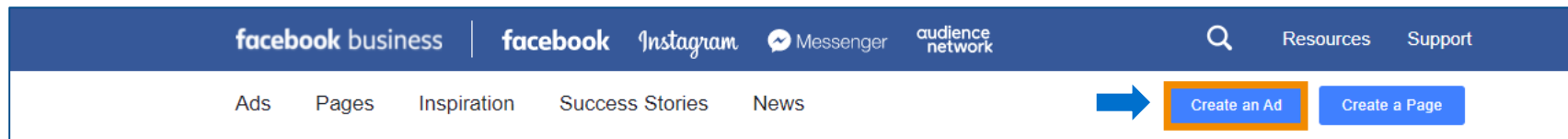
SECTION

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# How to Create Lookalike Audiences

To increase the number of leads in a target market, Facebook will take your existing list of at least 100 customers in the form of a Standard Custom Audience or a Website Audience list and populate a new list of prospects matching their characteristics. *(For instructions on creating a Standard Custom Audience, go to page 9.)*

1. To begin, go to **www.facebook.com/business** and click the **Create an Ad** button.

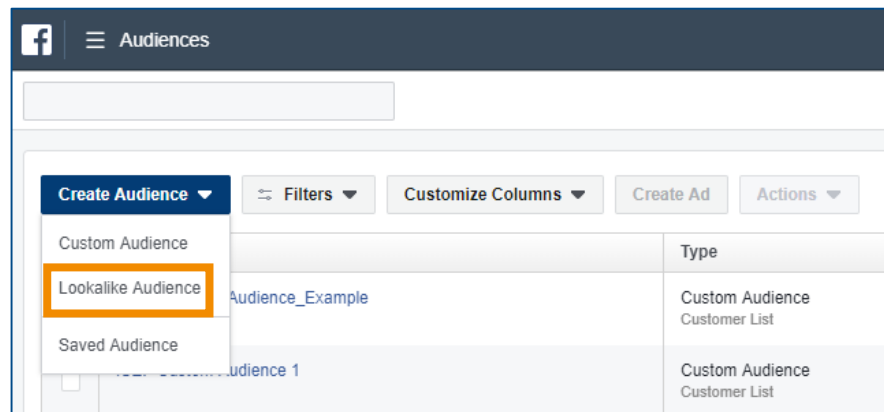


2. Select **Ads Manager** to view the drop-down menu items. Click **Audiences** under the **Assets** column.



# How to Create Lookalike Audiences

3. Select the **Create Audience** drop-down and click **Lookalike Audience**.



4. Select either a **Standard Custom Audience** or **Website Custom Audience** as the basis for your Lookalike Audience list. Select the geographic location for your Lookalike Audience matches, the number of Lookalike Audiences you wish to create, and the approximate number of matches you want on our Lookalike Audience list. Then click **Create Audience**.

A screenshot of the 'Create a Lookalike Audience' dialog box. At the top, it says 'Find new people on Facebook who are similar to your existing audiences. Learn more.' Below this are two main sections: 'Source' and 'Location'. The 'Source' section has a text input field containing 'ISEF\_Custom\_Audience\_Example' and a 'Create new' link. The 'Location' section has a dropdown menu showing 'Countries > North America' and 'United States', with a search bar below it. Below these sections is an 'Audience Size' slider ranging from 1 to 10, with a blue bar indicating the selected size. Below the slider, it says 'Resulting audiences' and 'Estimated reach'. The 'Resulting audiences' section shows 'Lookalike (US, 1%) - ISEF\_Custom\_Audience\_Example' and 'Audience size ranges from 1% to 10% of the total population in the countries you choose, with 1% being those who most closely match your source.' The 'Estimated reach' section shows '2,140,000 people'. At the bottom, there are 'Cancel' and 'Create Audience' buttons.

The drop-down menu will list **Standard Custom Audience** and **Website Custom Audiences** you have created. Choose a pre-existing list as the basis for the lookalike audience list.

Select the **countries or regions** for your lookalike audience members.

The **Audience Size** option allows you to choose the number of matches placed on your Lookalike Audience list. The "Audience Size" options range from 1% to 10% of the population of your selected country or region. Selecting a 1% audience size will create a Lookalike Audience list that is most closely related to the characteristics of your Standard or Website Audience.



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