



Social Media Primer: Maximizing Lead Capture with Facebook

A Guide to Using Tools from the Facebook Custom Audiences Tool Suite

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How to Use this Guide

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. Enrollment offices can use Custom Audience tools to identify and connect with prospective mission-aligned families.

This resource describes the step-by-step process of creating custom audiences from Facebook’s Custom Audience suite of tools. The guide focuses on the following four tools: 1) Custom Audience from a Customer List, 2) Website Custom Audience, 3) Engagement Custom Audience, and 4) Lookalike Audience.



Understanding the Basics of Facebook Custom Audiences

SECTION

1

Facebook Custom Audience Suite Generates Prospect Lists with a Range of Tools



Facebook Custom Audience Tool Suite

Lookalike Audience

Select an existing custom audience or website audience list and Facebook will populate a list of hundreds of additional users who match characteristics of current and prospective families on those lists

Website Custom Audience

Install Facebook Pixel tracking code onto your school's website to generate a list of people who visit or take action on specific pages to target these groups (e.g. those who visit admissions page, but do not submit an application)

Mobile App Custom Audience

Register the school's app through Facebook and specify the app activity that will be tracked (e.g. opening the app). Facebook creates audience lists from people who engaged with the app in the specified manner

Custom Audience from a Customer List

Upload a list of customer identifiers (e.g. email address, first and last name, phone number) and Facebook matches 60-80% of the list entries with existing Facebook users

Engagement Custom Audience

Identify the type of content engagement to track across the Facebook family of apps (e.g. people who watch videos posted on your page) and set rules to create a list of people who meet the criteria

1) "Standard Custom Audiences" is one of the five tools available to users.

Use Custom Audiences to Expand, Move Prospects Through the Enrollment Funnel

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



A Custom Audience from a Customer List was used to prompt prospective students who had left an application unfinished with a call to action to complete it

10%

Increase in summer program enrollment



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



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

12x

Conversion rate for Music Therapy graduate program



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



A Lookalike Audience was used to expand an ad campaign to a larger qualified pool of candidates

Major Reasons to Use Facebook Custom Audiences



Expand Existing 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

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.

Relevant to my school?	Admissions Team Goals	Custom Audience from a Customer List <i>Page 7</i>	Website Custom Audience <i>Page 12</i>	Engagement Custom Audience <i>Page 17</i>	Lookalike Audience <i>Page 21</i>
	Generate leads		✓	✓	✓
	Drive traffic to your website	✓	✓	✓	
	Connect with "stealth prospects" ¹		✓	✓	
	Convert inquiries into applicants	✓			
	Identify more families within your target market				✓

Step 2

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

Step 3

Move across the table horizontally to determine the Custom Audience tool you should use to meet these goals. Then go to the relevant page number for step-by-step instructions.



How to Create a Custom Audience from a Customer List

SECTION

2

Formatting a Customer List for Create a Custom Audience

A Custom Audience created from a customer list takes existing customer information and matches it to Facebook profiles so that you can advertise to these individuals. To create a customer list, you must first properly format parent information for upload in Excel as a .csv or txt file. To ensure parent information is correctly transferred into Facebook, use the column headers listed out below. Remember, the more information you include, the better chance Facebook will have at matching profiles. 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">username@hotmail.comyour.name@gmail.com
Phone Number	phone	<ul style="list-style-type: none">1-234-567-4321+44 845 412 7003
First Name	fn	<ul style="list-style-type: none">JamesT.
Last Name	ln	<ul style="list-style-type: none">JohnsonJones-Smith
Zip/Postal Code	zip	<ul style="list-style-type: none">2003720037-1435
City	ct	<ul style="list-style-type: none">RichmondWashington
State	st	<ul style="list-style-type: none">MDMaryland
Country	country	<ul style="list-style-type: none">USFR
Gender	gen	<ul style="list-style-type: none">MF
Date of Birth	dob	<ul style="list-style-type: none">MM-DD-YYMM/DD/YYMMDDYY

Data Entry Tips for Formatting Customer Files

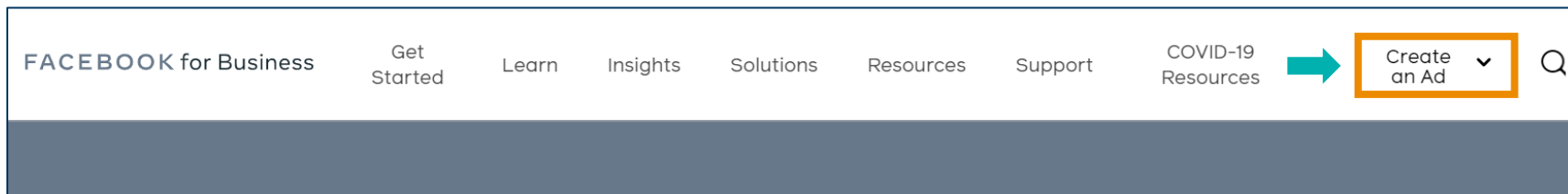
- Save your customer list file in a .csv or txt file format to upload onto Facebook
- Use the Facebook-provided column headers for easy matching
- Include as many customer identifiers as possible to increase the match potential between your customer and the correct Facebook user
- Separate first and 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

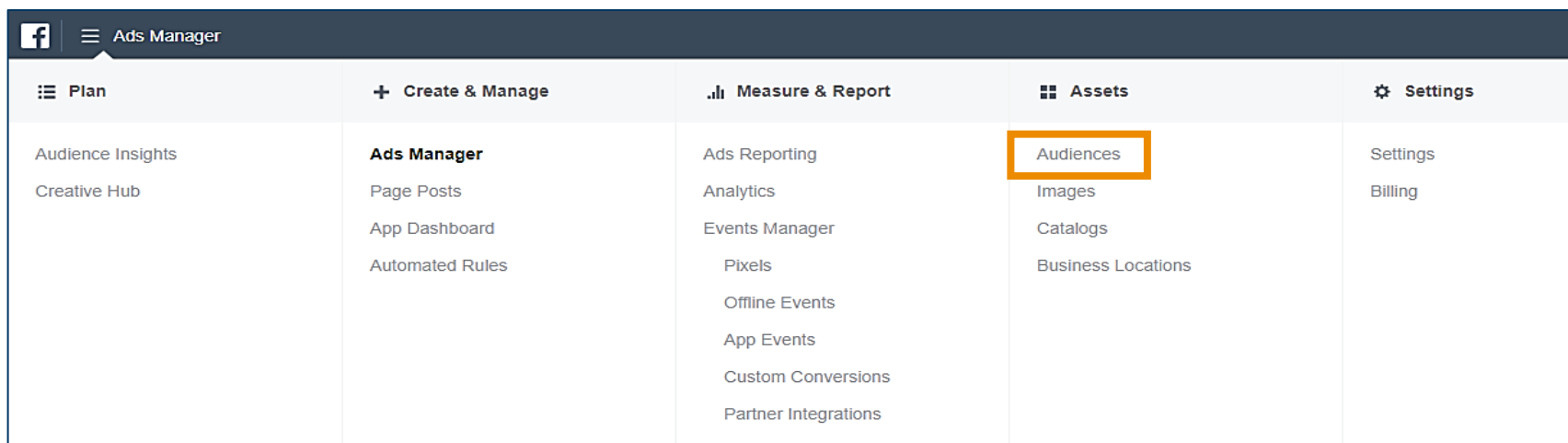
How to Create a Custom Audience from a Customer List

The following pages contain step-by-step instructions for creating a custom audience from a customer list. You will need your formatted customer list handy (see page 9) to complete this process.

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

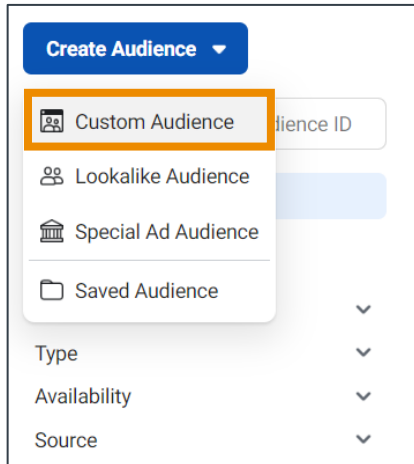


2. Select **Ads Manager** to view the drop-down menu items. Click **Audiences** under the **Assets** column.

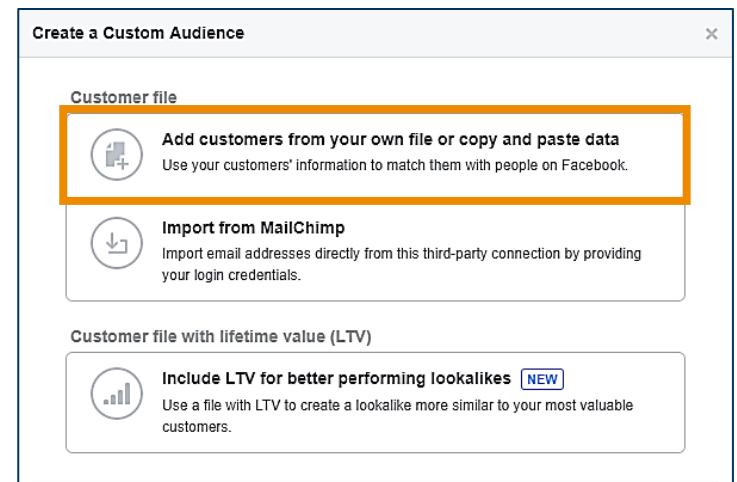
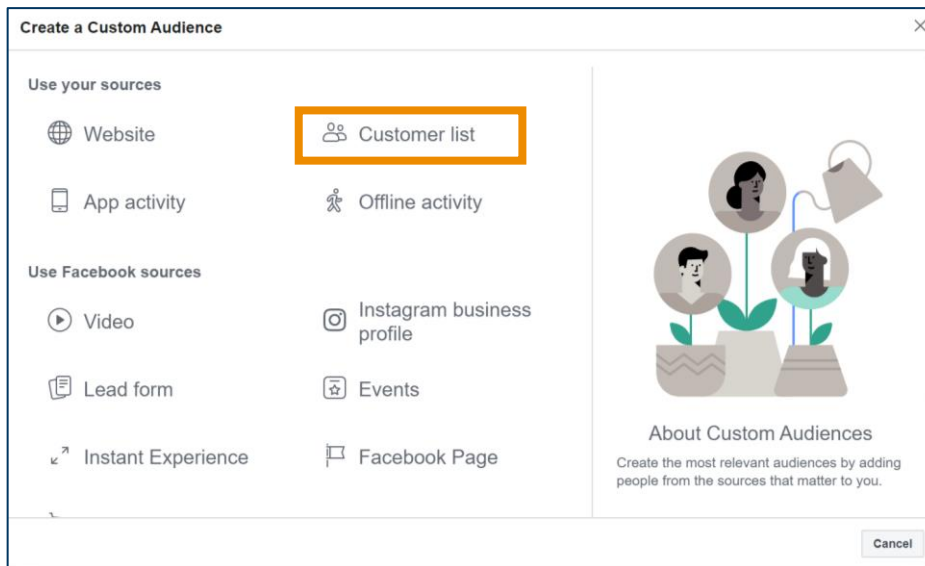


How to Create a Custom Audience from a Customer List (cont.)

3. Click **Create Audience** to view options for selecting an audience type; click **Custom Audience** to move on to the next step.



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



How to Create a Custom Audience from a Customer List (cont.)

5. Next, upload the customer file that you prepared earlier and give this list or “Audience” a **name**.

Create a data file Custom Audience

1 Prepare a file with your customer data

Identifiers you can use (15)

Email address Phone number Mobile advertiser ID First name Surname ZIP/Postcode City County/Region

Country Date of birth Year of birth Gender Age Facebook app user ID Facebook Page user ID

2 Add your file

Original data source Select the origin of this upload

Add a new file (CSV or TXT) Download file template

Drag and drop your file here or Upload File

Copy and paste

3 Name Your Audience

Name your audience 50 X Show description

Cancel Back Next

6. **Review your customer list** to confirm that the identifiers have been mapped correctly. When you're done, click **Upload and Create**.

Data Mapping Icons

In **Step 7**, look for the following icons to troubleshoot issues with data entry:

- ✓ Data is properly matched and ready for upload
- ! An exclamation mark means that you chose not to specify identifiers or that some identifiers need to be manually updated



How to Create a Website Custom Audience

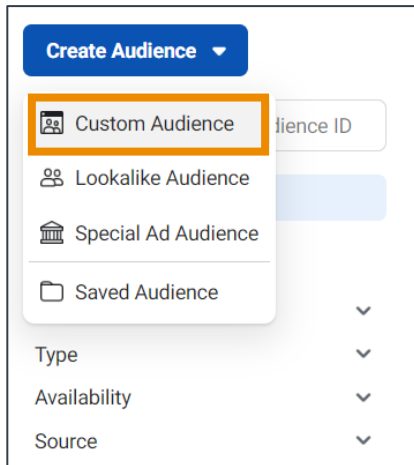
SECTION

3

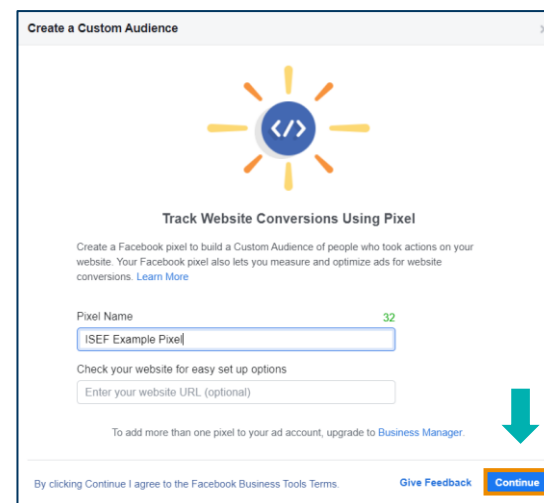
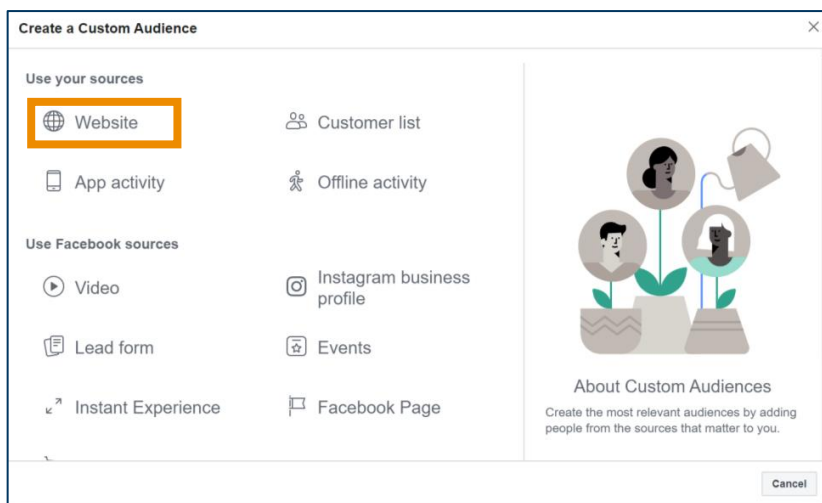
Create a Website Custom Audiences by First Tracking Website Visitors

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. Click **Create Audience** on the Audience main landing page and select **Custom Audience**.

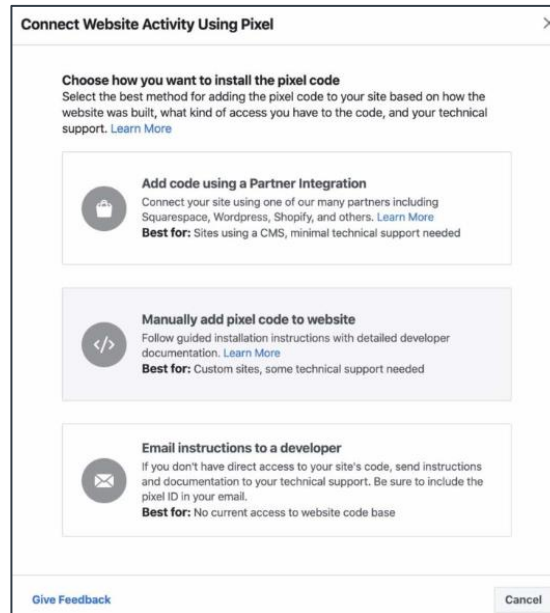


2. A pop-up will appear. Select **Website**. A second pop-up box will appear. Enter a name for your pixel to internally identify the information it is tracking and click **Continue**. (Note: Each ad account is granted one pixel. To add more than one pixel to your account, you must upgrade to a [business account](#) if you have not already done so.)

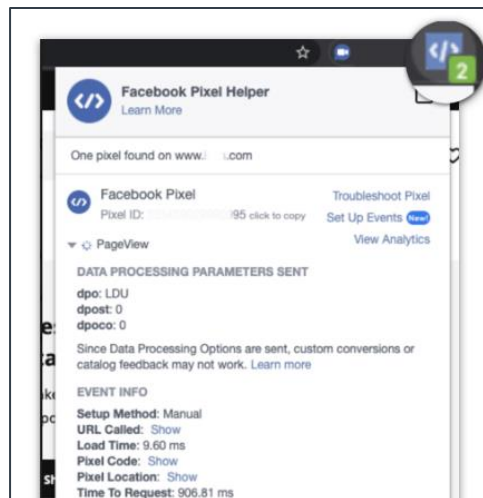


How to Add a Facebook Pixel Tracking Code

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 [Facebook Pixel Help Center](#).



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

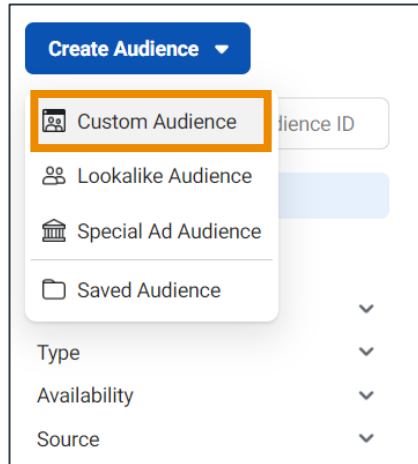


The Pixel Helper is a Google Chrome plugin used to validate that the pixel is correctly installed. To use the Website Audience tool, the Facebook pixel must be embedded to track customer actions and engagement. The Pixel Helper can be downloaded from the [Facebook Pixel Help Center](#).

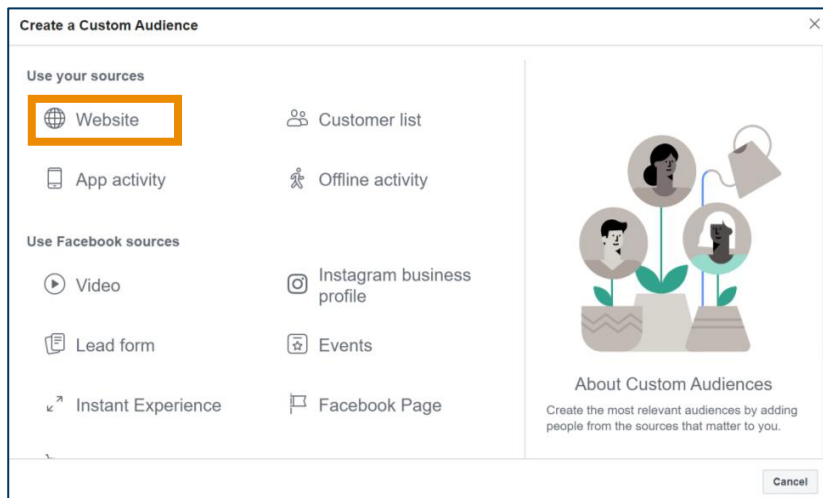
Create a Website Custom Audience by Generating a List of Website Visitors

Once the Facebook Pixel is installed, you can generate a Website Custom Audience, which will create a list of people who visited your tracked webpages based on a set of rules you specify.

1. Select **Ads Manager** to view the drop-down menu items. Once again, select **Custom Audience** under **Create Audience**.



2. Under the **Create a Custom Audience** pop-up, select **Website**.



Create an Audience by Specifying the Subset of Visitors You Wish to Target

3. Next, a pop-up box will appear prompting you to select parameters that Facebook will use to compile a list of website visitors, as described below. While there are many options, the simplest and most frequently used one is the preset, **All Website Visitors**; however, we recommend experimenting with different criteria to test out your marketing strategies on more specific subsets of website visitors.

The screenshot shows the 'Add People to Your Audience' step in the Facebook Audience Builder. It features a dropdown menu for 'Include people who meet' set to 'ANY', a criteria section for 'SAMPLE WEBSITE VISIT' with 'Visitors by time spent' and 'Top 25%' selected, and a time limit of '30 day'. Below this, there are options to 'Include more people' or 'Exclude People'. The 'Exclude' option is highlighted, leading to an 'Exclude people who meet any of the following criteria' section. At the bottom, there is a 'Name Your Audience' section with a text input field and a character count.

1 Add People to Your Audience

Include people who meet **ANY** of the following criteria:

SAMPLE WEBSITE VISIT

Visitors by time spent **Top 25%** in the past **30** day

URL contains

At least one of these values

Or

SAMPLE WEBSITE VISIT

All website visitors in the past 30 days

Include more people Exclude People

Exclude people who meet any of the following criteria:

SAMPLE WEBSITE VISIT

All website visitors in the past 30 days

Exclude People

2 Name Your Audience

Name your audience 50 x Add description

Selecting **ANY** will allow you to capture people who completed one or more of these actions. Selecting **ALL** is a more restrictive option, which may result in a much smaller list.

Create parameters for your website visitors to include 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, though **30 days** is typically the best time frame to use.

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

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

1) While this targeting is very specific, it can result in an audience that is too small, especially for websites that do not get a lot of traffic. Facebook will warn you if your audience is too small, in which case, you will need to adjust your parameters.



How to Create an Engagement Custom Audience

SECTION

4

Engagement Custom Audiences Relies on User Actions to Create an Audience

Engagement Custom Audiences can be created using **seven different types of engagement**. This allows you to create custom audiences **based on broad or targeted content**, as well as **your most popular mediums**.

After selecting the type of engagement, you will set rules to create a list of people who meet the desired criteria. **Examples include:**

- **Video:** Which video(s) people have watched, how much of the video they have seen
- **Page:** Whether people have visited your page, engaged with a post, clicked a call-to-action button and/or sent a message to your page
- **Events:** Whether people have visited an event page and/or purchased tickets for the event

Understanding the Difference Between Engagement Custom Audiences and Custom Audiences From Your Website



Engagement Custom Audiences

An Engagement Custom Audience uses data from **actions taken on Facebook's family of apps** (Facebook, Instagram, Messenger, WhatsApp)

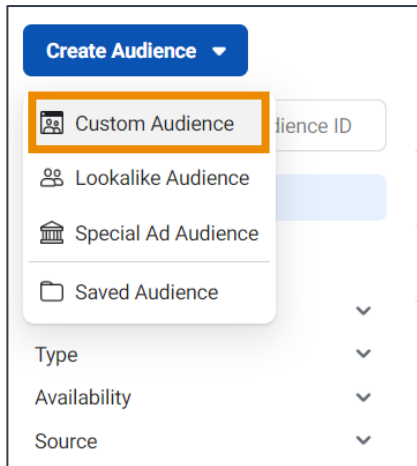


Custom Audiences from Your Website

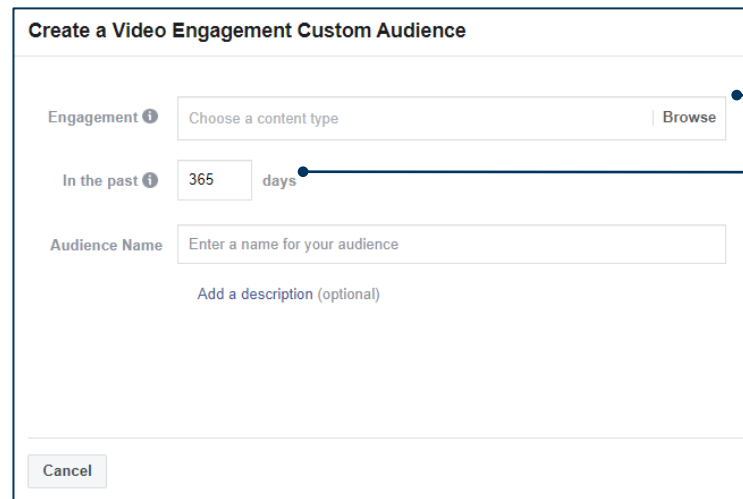
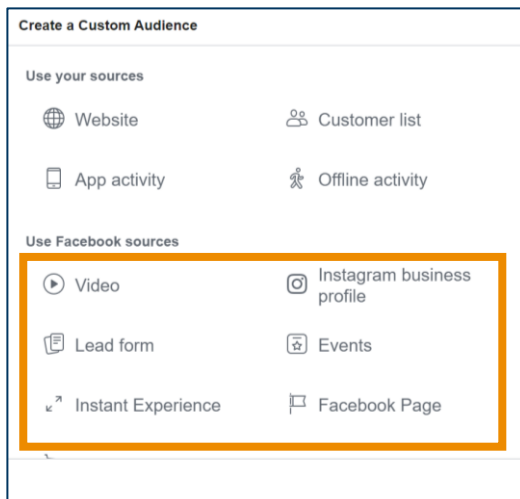
A Custom Audience from your Website uses data from **actions taken on your own website**, which is tracked by a Facebook pixel on your page

How to Create an Engagement Custom Audience

1. Click **Create a Custom Audience** on Audience main landing page.



2. A pop-up will appear. Select which of the **“Facebook Sources”** (Video, Instagram Business Profile, Lead form, Events, Instant Experience, Facebook Page) you would like to create an engagement audience based on. A second pop up will appear where you will fill out the type-specific criteria for your audience.

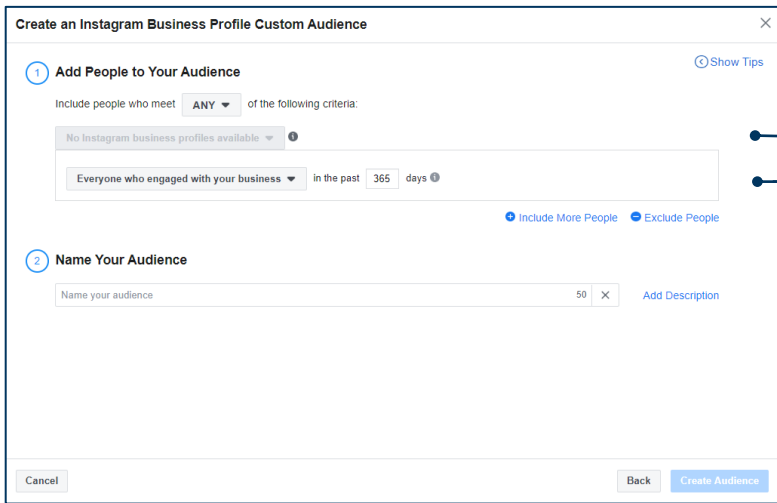
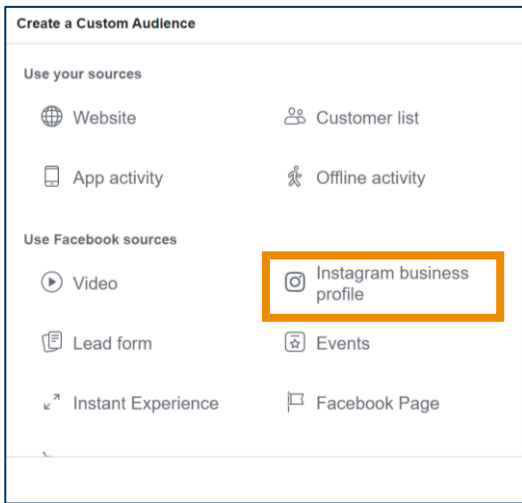


For videos, select **how much of the video someone has watched** to be included in the audience (by seconds or percentage).

Determine how long people will remain in your custom audience after they engage with your content.

How to Use Instagram with Engagement Custom Accounts

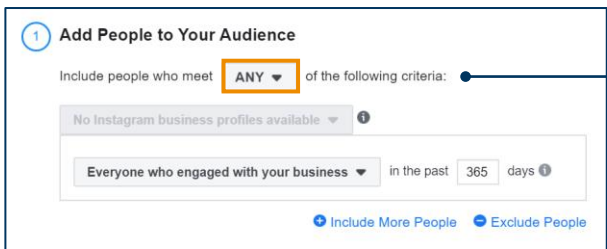
In order to use Engagement Custom Audiences on Instagram, you need to set up an [Instagram Business Account](#) or [Instagram Creator Account](#), if you haven't already done so. Then, follow step one and two from the previous page. Under **Use Facebook Sources**, click **Instagram Business Profile**; a pop up will appear where you fill out your desired type criteria for your audience.



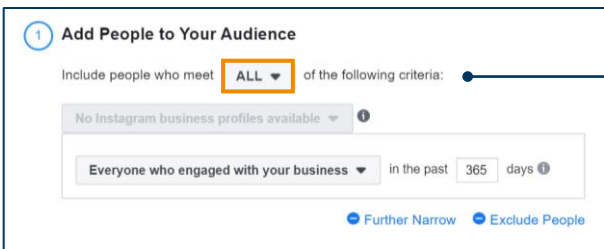
Select desired criteria from which to build audience. Criteria includes whether people visit your profile, engage with a post or ad, send messages to your profile, save a post or ad, and/or broadly engage with your school's Instagram account.

Determine how long people will remain in your custom audience after they engage with your content.

Note this important distinction when creating an Instagram Business Profile Custom Audience:



Using **ANY** allows you to capture people who completed one or more actions during a specified time.



Using **ALL** captures everyone who completed all criteria during a given time period. If there are many criteria, this list may be very small.



How to Create a Lookalike Audience

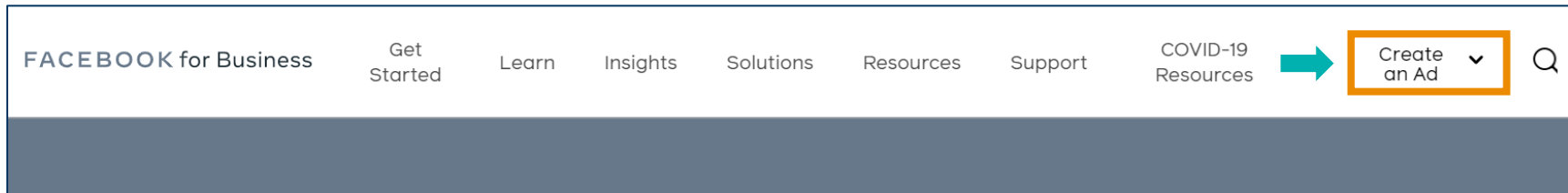
SECTION

5

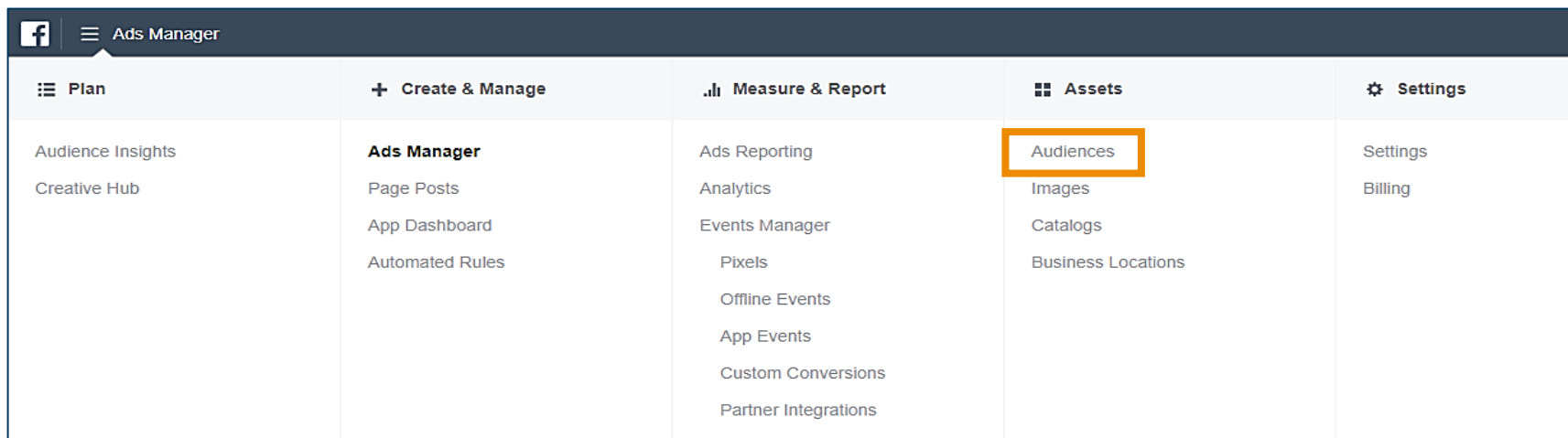
Use Lookalike Audience to Find Prospects Like Your Existing Customers

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 Custom Audience from a Customer List or a Website Audience list and populate a new list of prospects by matching their characteristics. (For instructions on creating a Custom Audience from a Custom List, see page 9.)

1. Click the **Create an Ad** button from your Facebook account.

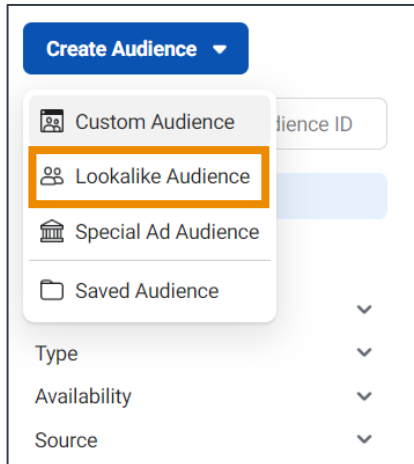


2. Select **Ads Manager** to view the drop-down menu items. Click **Audiences** under the **Assets** column.



How to Create a Lookalike Audience

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



4. Select either a **Custom Audience from a Customer List** 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' form. The form is titled 'Create a Lookalike Audience' and has a close button (X) in the top right corner. It is divided into three numbered steps: 1. 'Select Your Lookalike Source' with a 'Show Tips' link, showing a text input field with 'ISEF_Custom_Audience_Example' and a 'Create New Source' dropdown; 2. 'Select Audience Location' showing a dropdown menu with 'Countries > North America' and 'United States', and a search bar; 3. 'Select Audience Size' showing a slider for 'Number of lookalike audiences' with a value of '1' and a range from 0% to 10%, with a '2.4M' label above the slider. At the bottom, there are 'Cancel' and 'Create Audience' buttons.

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

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. 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 Custom Audience from a Customer List or Website Audience.



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