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# 2022 Social Media Checklist

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POLITICAL

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## Overview

As social media platforms continuously update their processes for page and disclaimer set-up, we've created a checklist to help get you started on social media.

## Setting Up Your Organic Social Media Accounts

For many candidates, one of the first items on the "campaign launch checklist" is to create or update campaign social media profiles. Throughout your campaign, your online community will help share updates, gather support, and aggregate a group of people who are invested in you and your campaign.

Below, we've included the "how-to" links for each of the top four recommended channels: Facebook, Instagram, Twitter and YouTube, as well as some of our team's favorite ways to leverage a strong social media presence to power your winning campaign!

### **Getting started on social media:**

[How to create a Facebook page](#)

[How to create an Instagram account](#)

[How to create a Twitter account](#)

[How to create a YouTube account](#)

*Campaign Tip:* Even if you already have accounts on these platforms, it's a great idea to create a specialized campaign account, such as "Isabella Jaye for School Board" to separate these from personal accounts. That way, your campaign accounts can focus solely on the election and why you're running.

Once you've gotten your social media pages up and running, you can use them as a:

- Quick, no-cost way to share updates about your campaign – such as a recent endorsement, a "thank you" post to a volunteer for hosting a house party, or sharing a new video ad.
- Channel to ask supporters to RSVP to online or in-person events.
- Information sharing platform as voters make decisions.
- Means of starting conversations with your voters.
- Way to share live updates during events. You can leverage these platforms to let your voters know – in real time – where you are, what you are hearing from voters, and how they can join in the fun.

## Facebook Verification for Paid Ads

In order to run political ads on Facebook you need to confirm your identity and create a political disclaimer. This entire process may take several weeks, so it is best to start as early as possible. First, you'll need to verify your identity, and then you can set up your disclaimer (which states who the ad was "paid for by").

Follow the steps below to start running your ads!

### How To Confirm Your Identity On Facebook

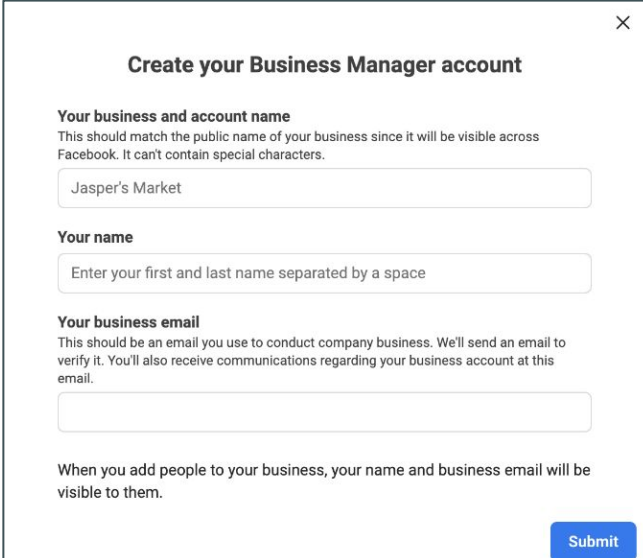
- To begin the verification process for your personal page, you will need to log into your personal Facebook profile. First you'll select Settings and Privacy > Settings > Account Settings. From there, you'll select the option to "View" your Identity Confirmation. You will need to submit your password, and then you'll be taken to a screen where you can select "Start Identity Confirmation."
- Next, you'll need to add two-factor authentication (2FA) to your personal profile. If this step is missed, Facebook will not be able to mail you your access code, so don't forget it! On your personal profile, head to Settings and Privacy > Security and Login. You'll see an option to use 2FA (2 Factor Authentication) and click "Edit." Choose the security method you want to add and follow the on-screen instructions.
- After you've got 2FA set up, Facebook will mail a unique code to the residential mailing address that you provided in step one. Please note it may take 3-7 business days to receive the letter. After you receive your code in the mail, you will enter that code in your personal Facebook's settings.

### Creating Your Disclaimer

- The next step is to link your ad account to the 2FA and create your disclaimer. If you are managing your campaign's Facebook account with Facebook Business Manager, you'll want to use Business Manager for this step. First select Settings > Issue, Electoral or Political Ads. Under "Link Disclaimers For This Page," select "View," and agree to comply with their Terms and Conditions.
- Under "Enable," select the ad account you're planning to use to run your political ads, and then click "Next." Then you'll add your approved disclaimer.
- When creating your political disclaimer, be sure to have the following available:
  - Organization's Legal Name
  - EIN Tax ID (with a PDF copy of legal form, W-9 / EIN form)
  - Organization Address and Phone
  - Organization Website, and reachable email with matching domain (I.E., website: [speakeasypolitical.com](http://speakeasypolitical.com), email: [janedoe@speakeasypolitical.com](mailto:janedoe@speakeasypolitical.com)).

## Facebook Business Manager and Ad Account Setup

When running Facebook ads, you will need to create a [Business Manager account](#). Business Manager allows advertisers to manage their marketing efforts in one place and share access to assets across their team, partner agencies, and vendors.



The screenshot shows a form titled "Create your Business Manager account" with a close button (X) in the top right corner. The form contains three main sections:

- Your business and account name:** A text input field containing "Jasper's Market". Below it, a note states: "This should match the public name of your business since it will be visible across Facebook. It can't contain special characters."
- Your name:** A text input field with the placeholder text "Enter your first and last name separated by a space".
- Your business email:** A text input field. Below it, a note states: "This should be an email you use to conduct company business. We'll send an email to verify it. You'll also receive communications regarding your business account at this email."

At the bottom of the form, there is a blue "Submit" button and a disclaimer: "When you add people to your business, your name and business email will be visible to them."

Once Business Manager is created, use these steps to create an ad account:

- Go to Business Settings.
- Click Accounts from the left side menu. Then, click Ad Accounts.
- Click the blue Add dropdown menu.
- Choose one of the 3 options: Add an Ad Account, Request Access to an Ad Account or Create a new ad account.
  - *If you choose to request access or add an ad account, enter the ad account ID.*
    - *To find your ad account ID Go to Ads Manager. Your ad account ID number is shown above the search and filter bar, in the account dropdown menu.*
- Follow the prompts to select people, access levels, and ad account roles!

### How to Connect Disclaimer to Ad Account

- Go to your Page. If your Page is managed in Business Manager, you'll need to access your Page through Business Manager to complete the rest of the steps.
- Click Settings.
- In the left menu, click Issue, Electoral or Political Ads.
- Below Link Disclaimers For This Page, click View.
- Before you can begin, you'll need to agree to comply with Terms and Conditions by clicking Accept.

## Facebook Ads Best Practices

### **The 3 C's: Clear, Concise, and Correct**

The highest performing ads feature a defined action. Politics is confusing enough already, so be sure to make your message as clear as possible when communicating to your voters. If you want them to donate, say that! If you want them to register to vote or volunteer, put it in big, bold letters.

Every impression only equates to a few seconds of a viewer's attention. We recommend your ad emphasizes a single takeaway to impress upon your viewers.

This cannot be emphasized enough: make sure your claims are absolutely 100% accurate – no questions asked. Even the perception of a deceptive or misleading claim can have disastrous implications for your campaign. Fact-checking should be delegated to a handful of individuals within the campaign and it certainly could not hurt to recruit a few trusted friends to help as well.

### **Listen to your data and target accordingly**

Facebook Ad Manager provides real-time analytics to help your campaign implement an effective targeting strategy. Make it a habit of checking daily, even multiple times a day, to keep tabs on engagements. Schedule a weekly meeting to evaluate trends and optimize your targeting. In the age of COVID, these metrics are the next best thing you will get to traditional polling.

## Uploading your Voter List on Facebook

1. Add your customer list: You can create your Custom Audience in Meta Ads Manager. Once in your account, go directly to Audiences, then go to Create Audience > Custom Audience > Customer list
2. Prepare your customer list: Select the identifiers to include, then add the customer list you want to use for your new Custom Audience and give it a name.
3. Review your customer list: Confirm that you mapped your identifiers correctly or check to see that all errors are resolved. You'll get one of the following notifications:
  - a. The green checkmark symbol means your identifiers were mapped correctly and are ready to be hashed, then used for the matching process.
  - b. The yellow exclamation symbol means either that you chose not to include certain identifiers or that some identifiers need to be manually updated. You have higher chances of getting a better match rate to build your audience if you make the corrections before uploading your file.
4. Upload your customer list: Once your list has been added and is ready for use, select Upload and Create.

For more on how to build a good list, check out our [blog!](#)

## How to Boost a FB Post

Learn how to create and boost an organic Facebook post in 6 easy steps, [here](#).

## Creating a Campaign Content Calendar

A strong social media presence plays a key role in connecting with voters.

With a content calendar, you are able to organize your social media posts across multiple platforms, manage posting and production schedules, and streamline your political campaign messaging agenda.

Looking to turn this content into action? Look no further: Our team has made a FREE Social Media Content Calendar specifically for your political campaign!

[\*\*DOWNLOAD FREE CAMPAIGN CONTENT CALENDAR\*\*](#)

## Google Ads Verification

As Google Ads and YouTube are both run by Google, the documents needed to get set-up for each are the same! In order to verify an account, please fill out the [Election Ads in the U.S form](#).

For approval, you will need:

- **Employer Identification Number (EIN) Form**
  - The EIN Form must include the EIN, the organization name, the organization address, and must be stamped or acknowledged by the IRS.
  - A W-9 would not work for this
  -

In order to run YouTube ads, the creative video should be uploaded onto YouTube on the organization account — the link must be public or unlisted.

## Google Search Ads Templates

Google Search Ads are a great way to get in front of voters. To help you get started, we've created a [Google Search Template](#) for you to get started on drafting your ads.

Just make a copy of the template, and get started! For Google Ads Best Practices, read more [here](#).

## Troubleshooting & Tips

### **Take the time to audit, or create, your social media properties.**

As a political candidate you are going to need, at a minimum, a presence on Facebook, Twitter and LinkedIn. All of these communities have functions you can use to invite all of your friends to connect with you. If you have read our [e-book on running for office](#), you know we encourage candidates to invest time in building out good lists for many reasons – including their use in helping to populate your social media accounts. Use these lists to try and connect with everyone you know (but not yet with people you don't know).

And please, before you do begin to grow your online presence, take down all those embarrassing photos. Weird late night tweets? Delete them now.

### **Pay attention to Facebook and social media protocols.**

Post regularly about relevant topics. Every now and then, make it personal, like “Thanks to my husband for helping me walk precincts on his birthday.” If you don't have something interesting to say — don't say it. But if something interesting, relevant or funny happens, post it. People ask if they should remove negative comments if “trolls” appear on your social sites. We usually recommend removing anything rude, lewd or untrue but leaving any legitimate discussions.

### **Growing your social media audience.**

You're in the middle of your campaign and you notice you don't have many people following you on Facebook or Twitter. Make sure that when you connect with people who give you their support, you immediately Friend, Follow and Connect to them — most of them will reciprocate. After that, start posting relevant content on your social media pages — often. Make sure you post and share a newspaper article about a local issue, your interview on a local blog, a picture of you at the Farmer's Market on Saturday morning. This will help drive engagements with users on your social media channels and keep them engaged and wanting to learn more.

## about SpeakEasy

We support Democratic campaigns, causes and consultants with leading data, strategic targeting, and comprehensive ad tech to launch digital media and direct mail strategies. Please visit us at [speakeasypolitical.com](https://speakeasypolitical.com) to learn more.

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