



learn

# facebook ads funnel

*A Strategic Agent Handbook*

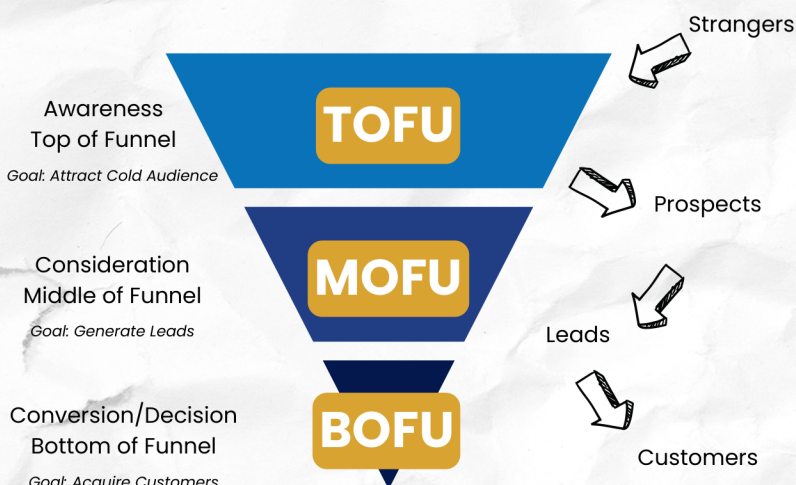
# Introduction to the Facebook Ads Funnel

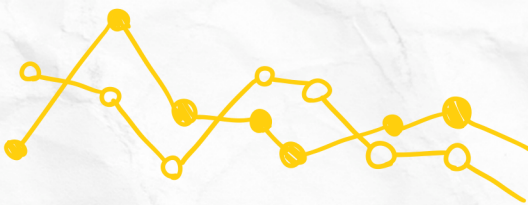
Facebook Ads Funnel is one of the most powerful, evergreen marketing strategies available that will help insurance agents generate new leads, increase ROI and grow their business. There's no doubt that Facebook Ads are a powerhouse when it comes to generating both leads and sales. However, the chances of someone just purchasing a Medicare health plan the first time they see your ad or engage with your brand are slim. To get prospects actually converting on your offer, you will need multiple touchpoints, and a funnel to move prospects from one point to the next. To set you up for success, here's how to create a perfect Facebook Ads funnel to boost your conversions and maximize your ROI.

## What is a Facebook Ads funnel?

Facebook Ads funnel is a sequence of ad campaigns designed to take users along the buyer's journey, from complete strangers to enrollees in a Medicare health plan. Technically speaking, the Facebook Ads funnel consists of multiple campaigns with multiple ads that include different value propositions delivered to the right audience at the right moment.

The Ad funnel consists of three main stages:





Facebook Ads allow you to target users at every stage of the buyer's journey:

- **Strangers (cold audience)** – Those not away of your insurance agency's brand, products or services
- **Prospects (warm audience)** – People that are aware of your insurance agency and have shown some form of interest in the products you offer or your services
- **Leads (hot audience)** – Highly interested Facebook users that shared their contact information and want to learn more about your products
- **Customers** – Buyers of your products/services

Facebook is one of the rare marketing channels that allows you to build a full funnel in just one platform. You can do this by moving users from one stage of the funnel to the next and showing them different ads that resonate with each step of the buyer's journey.

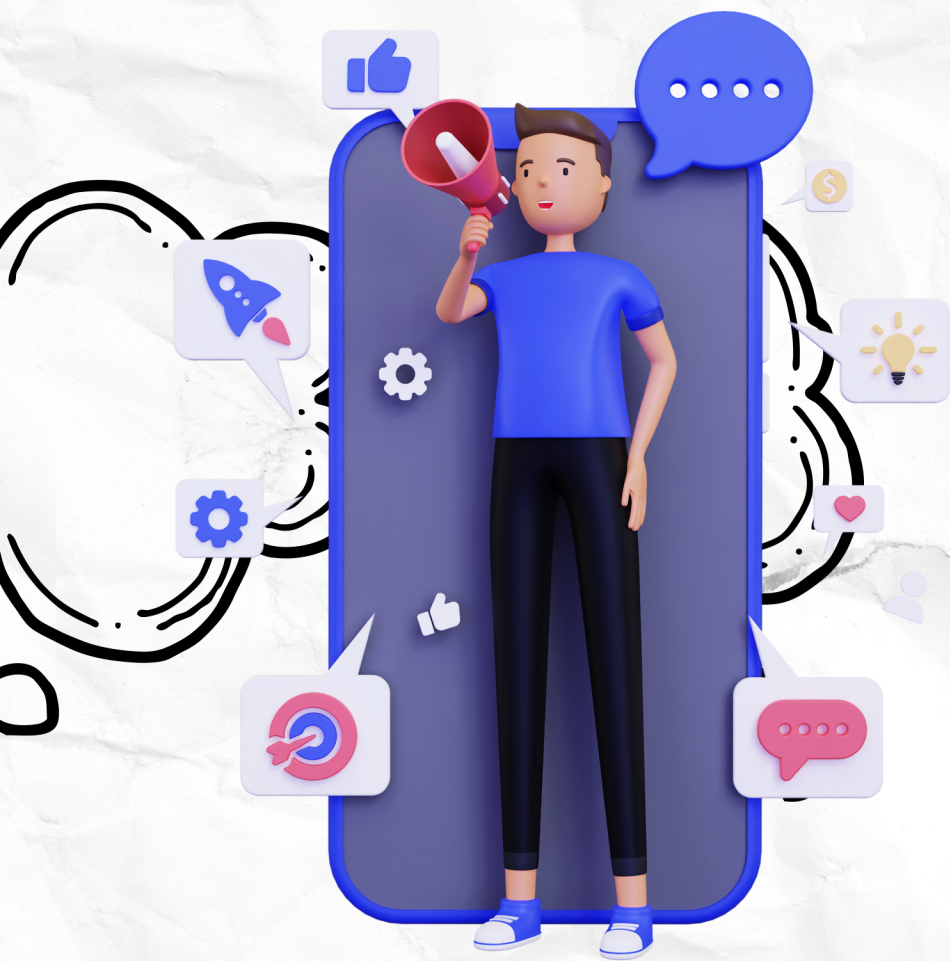


***Important: Though Facebook's very powerful, you should never put all your eggs in one basket. For best results, aim for an omnichannel marketing approach.***

Many inexperienced businesses try to run Facebook Ads and run it for a while, and give up once they see the acquisition costs are too high or they're not getting enough conversions. The problem is that they're going straight for the sale, pitching products to complete strangers. The goals are completely misaligned with the audience, as most users aren't ready to buy after just one ad. That's because you just introduced your brand for the first time; they still don't know or trust you. You may be tempted to go straight for the sale with just one ad, however, that's unlikely to work.

While sales are the ultimate goal, only some will buy your product/service the first time they see your ad. High-value conversions typically happen once a user interacts with your brand over multiple touchpoints. People on Facebook aren't actively looking for products to buy. Instead, they're socializing with friends and family, reading the news, or watching funny videos. Your ads interrupt that experience, that's why you need a scroll-stopping ad that's going to grab the user's full attention. But even so, if you do manage to grab attention, don't expect them to immediately buy from you.

The reason for this lies in the fundamentals of human psychology.



# How to Create a Perfect Facebook Ads Funnel

Building a perfect Facebook Ads funnel is the process of mapping out and configuring your Facebook campaign sequence across the buyer's journey. From attracting and warming up cold audiences all the way to converting them into delighted customers. The funnel-building process includes choosing the right Facebook objective, targeting the right audience, and using optimal ad format and messaging that resonate at each stage of the funnel.



***Important: Here are some best practices in targeting to help keep you compliant:***

- Agents should only boost posts on permitted social media channels that comply with all applicable laws and regulations, including HIPAA, the MCMG, and the carrier's policies & procedures.
- Agents should not discriminate based on race, ethnicity, national origin, religion, gender, sex, age, mental or physical disability, health status, receipt of health care, claims experience, medical history, genetic information, evidence of insurability, or geographic location.
- CMS regulations prohibit targeting potential enrollees from higher income areas or stating or implying plans are only available to seniors rather than to all Medicare beneficiaries, or stating or implying that plans are only available to Medicaid beneficiaries unless the plan is a DSNP or MMP.
- Agents may choose to target ads or boost posts to consumers based on campaign optimization and prior response rates.
- Agents can use an income range to target specific consumers based on campaign design. For example, \$0 premium posts might resonate better with a population that has lower incomes. CMS regulations prohibit any type of discriminatory activity, such as targeting enrollees from higher incomes.

- Agents may not target dual-eligible individuals using income levels when marketing plans that are not DSNP. The MCMG prohibits promoting plans that are not DSNPs to imply that their plan is designed for dual-eligible individuals or targeting their marketing efforts exclusively to dual-eligible individuals.
- Agents may not provide a list of Medicare members to Facebook or any other individual or entity, as this would be a HIPAA violation.
- Agents may only target ads or boost posts in areas where they are licensed, appointed, and certified to sell health plans.
- The boosting functionality on Facebook automatically selects Instagram & Messenger as default options in the "Placement" section. Be sure to deselect Messenger, as this would be considered unsolicited contact, and its strictly prohibited. Check the rules of the road with carriers you represent, as they have very specific guidance on ad use with social media.

You can determine the targeted audience, budget, and duration for the boost to run. When creating an ad or boosted post, you can only post content considered Communications by CMS's definition in the MCMG. As a reminder, agents should not create content that includes information about a plan's benefits structure, as it would need to be filed with the carriers and CMS.



### **Awareness Stage Copy Sample**

- "Approaching Medicare age? Get the guidance you need. Click to explore your options today!"
- "Unlock the secrets of Medicare with our comprehensive guide. Find your best-fit plan now!"
- "Confused about Medicare? We can help! Learn more with just one click."

### **Consideration Stage Copy Sample**

- "Find the Medicare plan that fits your life. Click for a no-cost, no-obligation consultation with a licensed sales agent."
- "Don't navigate Medicare alone. Our licensed insurance agents are here to help. Click for personalized guidance."
- "Get the clarity you need on Medicare. Connect with our licensed insurance agents today for a no-cost, no-obligation consultation."

### **Conversion Stage Copy Sample**

- "Your Medicare health plan is just a click away. Find the right plan now!"
- "Ready to choose your Medicare plan? Speak with a licensed sales agent today and take control of your health."
- "Ready to find a Medicare health plan that makes sense for you? Schedule a call"



**Be on the lookout for our step-by-step blueprint for a Facebook Ad Funnel.**

