



Using Social Media to Connect Financial Education and Online Filers

The Internet has changed the way we do taxes, simplifying what was once a confusing, time-consuming process for millions of taxpayers. While tax filing once required paper forms, pencils and calculators, the computer brings the security and safety of online automation and password protection. In an effort to attract first-time filers and help young people build valuable online habits, the United Way Metro Nashville and the Nashville Alliance for Financial Independence (NAFI) set the ambitious goal to support hundreds of taxpayers online with a Facebook Fan Page, loosely linked to MyMoneyNashville.org.



With support from the Walmart Foundation, One Economy Corporation, National Disability Institute, the United Way Worldwide, NAFI used the social network, Facebook, to promote a local community launch event, publicize the MyFreeTaxes.com website, and attract first time tax-filers.

How can Facebook help promoted and advertise events? How can your organization set up a Facebook Campaign of your own?

Inside the demographics of a Facebook campaign

There are almost one million Facebook users in the Nashville area¹. Local partners in the Nashville area leveraged their fan list by inviting them through Facebook to a local “launch party” that celebrated the free services available through the local MyFreeTaxes.com website and the MyMoneyNashville.org site. A large part of the success of a Facebook campaign to reach new filers is attributed to the Facebook ads, which allowed the United Way of Nashville to reach targeted demographics, first-time filers.

Creating a Facebook Fan and Advertising Campaign

All campaigns need a promotion strategy to get the word out and build on the word-of-mouth outreach strategies. Follow these instructions to build your own Facebook campaign to reach the world's largest online audience with your services.

First, create a Facebook fan page. On this page, you can promote any activity or core service of your organization, in addition to the free online tax services. For strategies on how to build your own page, visit this webpage to get started (<http://goo.gl/50HV>) or this page to learn more (<http://goo.gl/RMbN>).

The fanpage should include a link to your local webpage and a direct link to our organization-specific MyFreeTaxes.com URL so that users can and file online. This will allow users to click through directly to the Beehive from your fan page without ever visiting any other sites.

Second, create an ad, which once clicked on, would go to your facebook fan page. To get started with this visit this page (<http://www.facebook.com/ads/create/>) or this page (<http://goo.gl/S76i>) that shows tips in video form. Facebook Ads are very successful referres to your fan page. The music event did not produce a large turn out, but was a way to engage our

MyMoneyNashville.org Got your W-2s? Have you done your taxes yet? Remember you can do them for free if you made below 58,000 last year. No sense in wasting that tax refund!
02 February at 12:00 · Comment · Like

MyMoneyNashville.org DON'T PAY to get your taxes done! DON'T BUY tax software. If you made below \$58,000 last year, you can do your taxes for free!
25 January at 08:42 · Comment · Like

3 people like this.

Write a comment...

MyMoneyNashville.org Don't Be a Slacker; File Your Taxes Online...For FREE!
21 January at 08:35 · Comment · Like

3 people like this.

Write a comment...

MyMoneyNashville.org

A way to help out; Become a Self-preparation coach! Volunteer Income Tax Assistance (VITA) sites are seeking volunteers to help guide taxpayers through an online, do-it-yourself tax preparation program (similar to TurboTax)...

12 January at 16:50 · Comment · Like · Share

3 people like this.



Erika Chambers I did this last year, it was very rewarding :) I didn't realize how intimidating online filing could be for some elderly and non-computer literate filers. I take a lot of things for granted, like my ability to type and navigate the interwebs.

12 January at 18:01 · Like · Report



Stacy Stecher Garrison I'm volunteering for the first time this year. Just finished my 20+ hrs of training! Look forward to it.

12 January at 21:29 · Like · Report



MyMoneyNashville.org you don't even need 20 hrs of training to be a self-prep coach! Just come to the training class.

25 January at 08:42 · Like · Report

Write a comment...

MyMoneyNashville.org Pics from the MyMoneyNashville event from 2009

¹ Facebook.com as of September 19th, 2010 (within 50 miles of Nashville's city center)

online users and keep them interested in what the organization was doing.

Set up a Facebook advertisement in six simple steps

Start by going to Facebook's "Ads & Pages" tab. Once there, click the green "Create an Ad" button. Next, design an ad with a title that is relevant and action oriented. In the description, include details such as phone number, location, and operating hours with a link to your Facebook page. On this page, you can define your demographics by city, age, school, or a number of other characteristics. Defining a budget is also and setting the start and end dates for the campaign is also important. After making these selections, you can review your ad and place your order.

Once the ad campaign has launched, a Facebook page gives additional information to possible visitors. To create a Facebook page return to the "Ads & Pages" tab and click create a page. In the basic formatting, select "Brand, product, or organization" and "financial service." Give the page a relevant title, (e.g. "United Way Free Tax Filing Nashville"). After selecting the checkbox indicating that you have authority to represent this service, click to create the page and follow the guide to add pictures, a description, and any additional information.

The final step in a Facebook Campaign is getting the word out by inviting your Facebook friends to view, like, and comment on your page. To invite your friends to the page, click on the "**Suggest to Friends**" link on the left side of your Facebook page underneath the picture. Lastly, decide which friends you want to invite and send out the invitations.

From Facebook to the Promotional Launch Party

The United Way Metro Nashville successfully used a Facebook marketing campaign to bring potential clients out for a "launch party" in the community. The launch was a community



celebration that educated people about the campaign and encouraged them to self-prepare their income taxes. Pictures from the Facebook group page decorated the space and a giant screen displayed the call to action: “File Online Today”. Local Nashville partners offered free tax preparation on location. The “launch party” also let the Facebook community know about other free services and programs made available through the United Way and other local organizations.

Conclusion

Through the creation of a simple Facebook Ad campaign, NAFI and United Way Metro Nashville recruited over 600 fans to their Facebook page. Communicating with their tech-savvy audience through the website, NAFI was able offer free tax filing as part of a larger group of online tools, including resume help and financial planning advice. Facebook significantly increased the Nashville campaign’s ability to concentrate and distribute messaging, promotion materials and announcements, and draw a large crowd for the local launch event.