

Standard Operating Procedure (SOP) for Creating a Business Facebook and Instagram Page for New Franchise Owners

NOTE _ THIS PROCESS IS DIFFERENT IF YOU'RE TAKING OVER AN EXISTING FACEBOOK PAGE

Purpose

This SOP outlines the steps for the in-house team to create and set up a new business Facebook and Instagram page for franchise owners.

Scope

This procedure applies to the in-house team responsible for setting up social media pages for new franchise owners.

Responsibilities

Marketing Team: Responsible for executing the steps in this SOP.

Franchise Manager: Responsible for providing necessary information and approvals.

Required Information

- Business name
- Business contact details (phone number, email, address)
- Franchise owner's name and contact information
- Business logo and cover photo ([found in Canva](#))
- Business bio (up to 100 characters) - example: *Offering custom blinds, shades, shutters, & drapery in Cherry Hill, NJ. Book a free consultation.*

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Procedure

Step 1: Gather Necessary Information

1. Contact the Franchise Manager to obtain the required details listed above. Or view [shared doc in Contact Information file](#).
2. Verify all information for accuracy and completeness.

Step 2: To Create a NEW Facebook Business Page

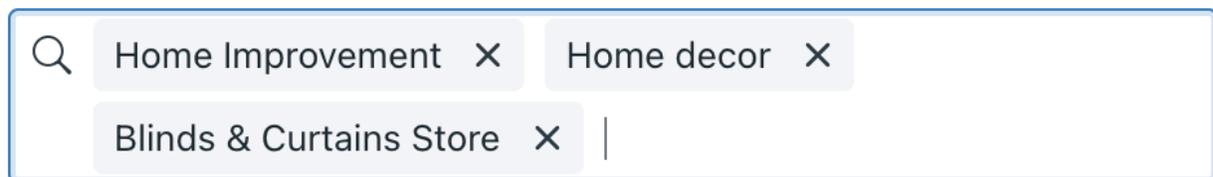
1. Log in to the company's main Facebook account found [HERE](#)
2. Navigate to the Facebook Page Creation tool by clicking on the "Add" button in the top right corner and selecting "Create a New Facebook Page."
3. Enter Page Name

Use the naming convention: Made in the Shade (location) for example: Made in the Shade Cherry Hill

4. Select these categories

Category

Choose a category that describes what type of business, organization or topic the Page represents. You can add up to 3.



5. Add 100 character bio – like this: “Made in the Shade (LOCATION NAME) offers custom window blinds, shades, shutters and more. Call us Today.”
6. Confirm that the new page will be nested under the main MITS page. Agree and check the box and click “Create Page.”

Step 3: Complete Facebook Page Information

1. Switch to managing the new page so that you can complete the set up.
2. Upload Profile Picture and Cover Photo:
 - a. Profile Picture: Upload the business logo ([found HERE in Canva](#))

- b. Cover Photo: Upload a high-quality cover image representing the business (found HERE in Canva)
- 3. Click on the tab – Contact & Basic Info - Add their service area (you can find this on their website footer)
- 4. Add their website address
- 5. Add their business phone number
- 6. Click on the tab – Details About You - Add their website bio (or a shortened version) to the About Us area
- 7. Create their first post of 6 – 8 images and a short description with an invitation to visit their website – for example: *Transform your home with stunning custom window treatments! Visit our website to explore our exquisite collection of blinds, shades, shutters, and drapery. Discover how we can bring style and elegance to every room. Click the link below and schedule your free consultation today!*
 [Your Website URL] #WindowTreatments #HomeDecor #Blinds #Shades #Shutters #Drapery #CherryHill #FreeConsultation #MadeInTheShade
- 8. Add a Username: Create a unique username for the page ([Try this URL](#)). Use the naming convention mits(location) with no spaces. For example,

General Page settings

Name	Made in the Shade Cherry Hill	Edit
Username	<p>Your public username is the same as your timeline address:</p> <ul style="list-style-type: none"> ▪ facebook.com/mitscherryhill <p>Username <input type="text" value="mitscherryhill"/>   Username is available</p> <p><input type="button" value="Save changes"/> <input type="button" value="Cancel"/></p>	

- 9. [Visit the Page Access](#) to invite the owners to access the page. You’ll need their personal email address that they currently use with Facebook. Click “Add New” for people with Facebook access. Invite the owners.

INSTAGRAM

Step 1: You’ll need real-time access to the owner. Set up a call for this last step.

Stay in the [Facebook Meta Suite](#).

1. Select the location you'd like to make an Instagram page for. Click Connect Assets.
2. Select Instagram Account.
3. Select Create New Account.
4. Enter their information.
5. Choose a Username and Password: Ensure the username is consistent with the Facebook page by staying with our naming convention (example: mitscherryhill)
6. Confirm the 6 digit code.
7. Select Business Page.
8. Set category – Home Improvement or Home Decor.
9. Allow the access to inbox
10. Log in as them to complete the final steps:
 - a. Profile Picture: Use the business logo.
 - b. Name: Enter the business name.
 - c. Website: Add the business website.
 - d. Bio: Use the same short description of the business, like the one on Facebook.
11. Post Initial Content - Post a high-quality image related to the business with a welcoming caption.

Step 6: Final Review and Handover

1. Review Both Pages: Ensure all information is correct and the branding is consistent across both platforms.
2. Notify the Franchise Owner: Inform them that the pages are set up and provide them with access credentials if needed by inviting them to the page.
3. Document Completion: Record the completion of the task in Zen Desk.