



KASASA®

Twitter

Total Twitter Account Creation and Optimization

35 minutes | 2nd Ed. February 2019

I Introduction

Introduction

Like a “viral” post, social media has exploded in popularity, becoming a must-have component of any marketing strategy aimed at Millennials. This e-book is part of a series we created to help community banks and credit unions take advantage of the opportunities at your fingertips.

In this guide, you'll find a checklist that will help you optimize your financial institution's Twitter profile and increase your chances of being discovered by local consumers. Here are some recommendations for the guide:

1. Start with the checklist. If you need a refresher or hit a snag, the corresponding section contains a complete walk-through.
2. Be consistent in how you spell your name, address, and phone number across all sites. For example, don't list your address as 111 Banking Drive on one site, and 111 Banking Dr. on another.
3. List the branch's actual phone number, not 800 numbers.

Why Should Twitter Matter to You?

In short, Twitter provides immediate access to fans and dissatisfied customers alike. The immediacy of the format gives you the opportunity to respond quickly (and publicly, if appropriate) to complaints. In fact, 72% of Twitter users who post complaints to the platform expect a response within an hour.* If you care about customer satisfaction, Twitter is a great way to show how serious you are.

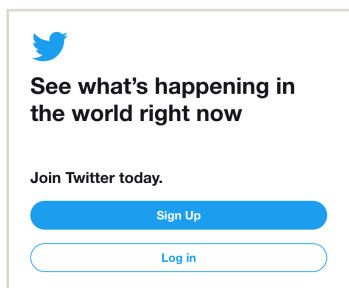
I Twitter checklist

- ☐ Create an account
- ☐ Optimize your account
- ☐ Optimize your profile
- ☐ Tweet regularly
- ☐ Who to follow
- ☐ Retweeting

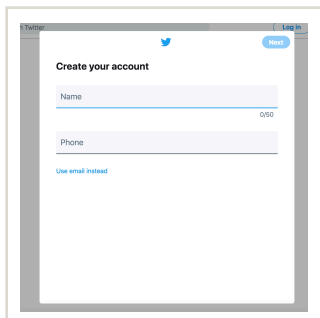
II Twitter How-tos

Create an account

- 1 Visit <http://twitter.com>.



- 2 Click "Sign Up" in the upper right corner.
- 3 Select "use email instead" to create an account using an email that is associated to your website domain and is accessible by the person who will be running your Twitter account. If you use a phone number, be sure that it is a mobile phone with SMS text capabilities. This will be necessary for verifying your account. For "Name," enter the name of your institution.



- 4 Add a photo. This photo should be your institution's logo. Before you upload the photo, give it a file name that includes your institution's name and the city you serve. Example: Freedom_Institution_Austin.jpg

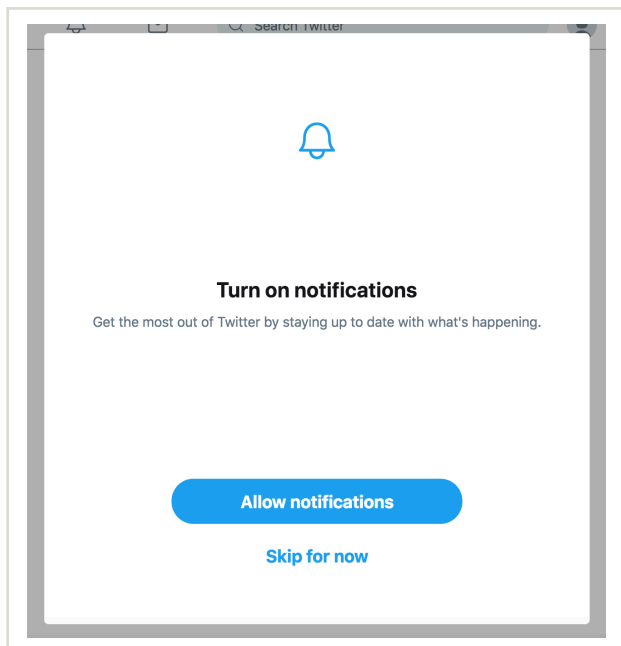
Create an account

🕒 5 minutes

🔧 Name, email address, and a high quality version of your logo to use as a profile photo.

II Twitter How-tos

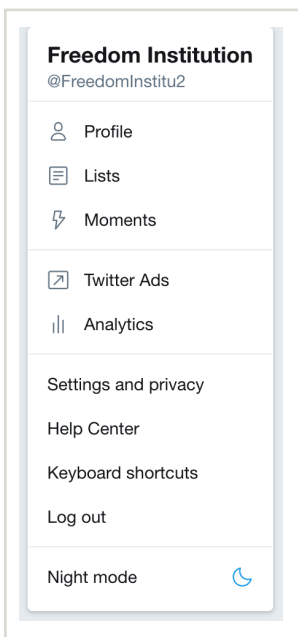
- 5 Skip the “Interests” section for now.
- 6 Skip the “Who to follow” section for now.
- 7 Allow notifications.



II Twitter How-tos

Optimize your account

- 1 Click your user icon in the top right corner.
- 2 Select “Settings and privacy”. You can use this page to make edits to your account settings.




In the “Account” section:

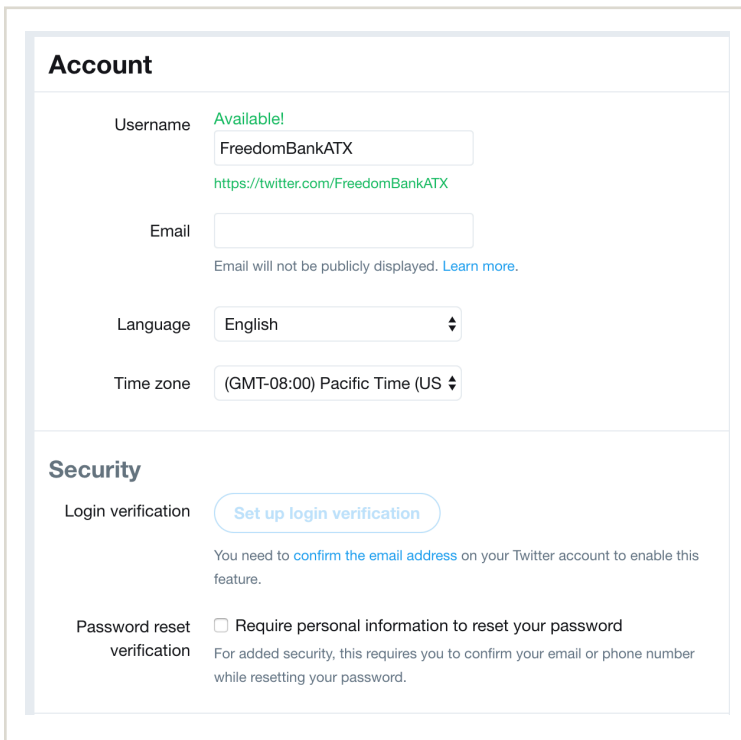
- ☐ Start out by editing your username. Your username should be as close to your institution’s name as possible. Avoid using numbers if you can. If the name you are looking for isn’t available, try adding the three letter city abbreviation to the end.

Optimize your account

5 minutes

-  Several ideas for available Twitter handles less than 15 characters

II Twitter How-tos



Account

Username Available!

<https://twitter.com/FreedomBankATX>

Email
 Email will not be publicly displayed. [Learn more.](#)

Language

Time zone

Security

Login verification [Set up login verification](#)
 You need to [confirm the email address](#) on your Twitter account to enable this feature.

Password reset verification ☐ **Require personal information to reset your password**
 For added security, this requires you to confirm your email or phone number while resetting your password.

- ☐ Make sure your email is associated with your domain URL and that the person running your Twitter account has access to it.

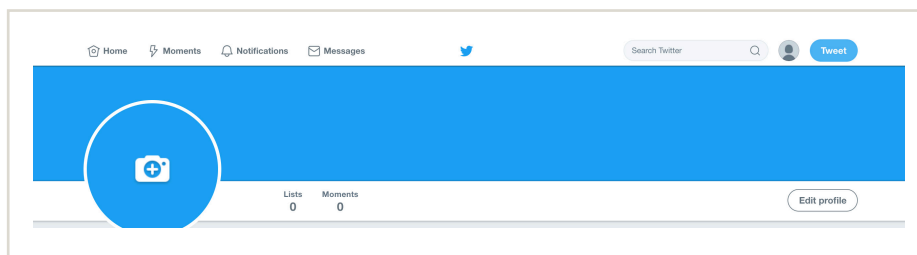
In the “Privacy and safety” section:

- ☐ Uncheck “Protect your Tweets.”
- ☐ Check “Tweet with a location.”
- ☐ Photo tagging – Allow people you follow to tag you in photos.
- ☐ Discoverability – Allow others to find you by both email and phone number.

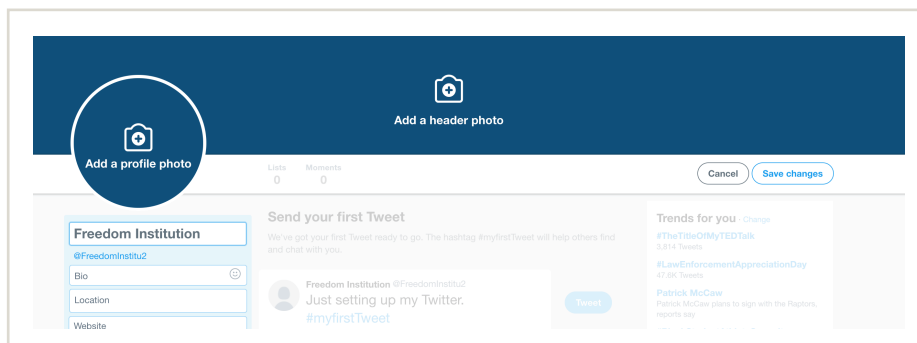
II Twitter How-tos

Optimize your profile

- 1 To edit your profile, click your user icon in the top right corner. Select “Profile.”
- 2 Select “Edit profile.”



Here you will be able to edit the details of your profile.



II Twitter How-tos

Make sure you include:

- ☐ A bio
Your bio lets the world know what to expect from this account. Your bio must be less than 160 characters. You should mention that you are a community bank or credit union and include the town you serve. An example of a good bio would be "Austin area community bank tweeting financial tips, tricks, and the occasional joke. Member FDIC."
- ☐ A header photo (1500 X 500)
- ☐ Your location
- ☐ Website
- ☐ Confirm the name listed is your institution's name. This is important because it's what appears in Google search results.
- ☐ Edit your theme color to align with your brand.

II Twitter How-tos

Tweet regularly

Tweeting regularly allows for a wealth of content to be accumulated for potential followers and builds up location data for search algorithms to pull from.

Tweet regularly

🕒 5 – 10 minutes a day

🔑 Your content

Who to follow

Following people who are local influencers will help you listen to community conversations, identify new opportunities, and create stronger signals that you are a local institution.

- 1 Start by navigating to Twitter's Advanced Search <https://twitter.com/search-advanced>.
- 2 Under the "Places" section, set the "Near this Place" option to the town where your branch is located.

Who to follow

🕒 10 minutes once a week

🔑 None

Places

Near this place

📍 Add location

- 3 Hit "Search."
- 4 The results will default to the "Top" tab. Switch to the "Accounts" tab to find the most influential people in the area.
- 5 Begin to follow. Don't go crazy. Make sure you recognize who these people are and that they are people you would actually engage with in real life. Good candidates include news station personalities, radio DJs, politicians, and local business owners.

II Twitter How-tos

Retweeting


Now that you're following a good selection of people, you can start retweeting their content. Again, this improves the social signals around your account, and retweeting the right content will help you build an audience and quality relationships.


When you retweet, quote the original tweet and add your own comment. It is important to add your own spin to the information you're sharing. This helps build your brand.

Retweet content that:

- Resonates with your brand
- Helps position your brand
- Is fun and engaging
- Helps educate your consumers
- Spreads important local news
- Consumer testimonials
- Quality employee tweets

Retweeting

 5 minutes a day

 A good amount of people that you follow

II Twitter How-tos

In closing

Completing all the steps in this guide is a great way to establish your brand on Twitter. With a little time and guidance, it doesn't have to be overwhelming. We're passionate about helping community financial institutions develop winning social media strategies.

Ready to create raving fans and loyal account holders with Kasasa? [Contact us](#) to get started.