

# How to Use Twitter



A Reference  
Guide for  
FCMs, IBs,  
and CTAs

## Top 10 Reasons that your IB, FCM, or CTA should use Twitter

1. Social media is a tool to drive traffic to your website as well as help your website search ranking.
2. Twitter can help you build relationships, engage with your audience, and provide good customer service.
3. Twitter can help you find new customers and expand your audience.
4. Twitter is a very cheap and yet very effective marketing tool to add to your overall marketing mix.
5. Twitter allows your audience to provide you with instant feedback. You can respond to problems more immediately and manage your company's reputation.
6. You can share content and news easier and faster than virtually any other means of distribution.
7. Twitter profiles are free – by having a profile you are building brand awareness at little cost.
8. Using Twitter is measurable. Twitter has built-in analytics so you can get insight into what posts are most popular, etc.
9. By posting original content you're establishing your company as a thought leader in the industry.
10. Your competition is on social media. You should be there, too.

## Twitter Overview

Twitter is a free online social channel where you can feature the content your organization is producing. While limited to 140 text characters, you can insert links to posts, include hashtags, and attach images.

Twitter is a way to connect and interact with clients, potential clients, and other professionals in your field. It is important to note that Twitter is not a platform for the constant sales pitch, it is a platform to connect and meet people that you would not otherwise be able to meet.

In short: You do not increase sales because you Tweet a good sales pitch, you increase sales because people like you, and you add value to their community. Twitter increases brand loyalty and increases exposure. It allows for you to engage others, and others to engage you.

As an IB, FCM, or CTA it is important to note that company Tweets are subject to NFA [Rules 2-29 and 2-36: Communications with the Public and Promotional Material](#).

Please review these rules prior to using Twitter.

Each Twitter post will need to have the approval of your compliance department before it gets posted. Here are some ideas for posts:

Company news, blog posts, data points, facts, charts, and infographics

- Inform and be informed on events, conferences, and workshops
- Stay current on breaking industry news, trending topics, new rules and regulations, and new technologies
- Share and re-Tweet thought leadership content that reflects the values or your organization as well as company and organization blog posts, observations,
- Re-Tweet the posts of partner companies and organizations

## Getting Set Up on Twitter

If your IB, FCM, or CTA would like to set up a company Twitter account, simply follow these instructions.

1. Go to <http://twitter.com> and find the sign up box, or go directly to <https://twitter.com/signup>.
2. Enter your **full name**, **phone number**, and a **password**.
3. Click **Sign up for Twitter**.
4. In order to verify your phone number, Twitter will send you an SMS text message with a code.
5. Enter the verification code in the box provided.
6. Once you've clicked **Sign up for Twitter**, select a **username** (usernames are unique identifiers on Twitter) — type your own and Twitter will tell you if the username you want is available.
7. **Double-check** your name, phone number, password, and username.
8. Click **Create my account**. You may be asked to complete a Captcha to identify that you're human.

### Tips for picking a username:

- Your **username** is the name your followers use when sending @replies, mentions, and direct messages.
- It will also form the URL of your Twitter profile page. Twitter provide a few available suggestions when you sign up, but feel free to choose your own.
- **Please note:** You can change your username in your account settings at any time, as long as the new username is not already in use.
- Usernames **must be fewer than 15 characters** in length and cannot contain "admin" or "Twitter", in order to avoid brand confusion.

### Important information about signing up with email address:

- **An email address can only be associated with one Twitter account at a time.**
- The email address you use on your Twitter account is not publicly visible to others on Twitter.
- Twitter will use the email you enter to confirm your new Twitter account. Be sure to enter an email address that you actively use and have access to. Check your inbox for a confirmation email to make sure you signed up for your account correctly.

## Adding Information and Branding to Your Twitter Profile

You will have the opportunity to add a brief (compliant) description about your IB, FCM, or CTA and can upload both a Profile Photo (often a logo) as well as a Header Photo to help establish and support your company's branding.

**Recommended Header Photo Dimensions: 1500px (width) x 421px (height)**

## Connect on Mobile

One of the best things about Twitter is that it's portable. Connect your account to your mobile phone or download a Twitter application to begin reading Tweets on the go.

**Tip:** Using Twitter via SMS allows you to pick and choose which updates you want from those you follow, so you can get mobile updates from the accounts that matter most to your life on-the-go.

## The Language of Twitter

### Tweet

- A tweet is a 140-character message that is uploaded instantly into a feed of tweets. You only see tweets from people you choose to follow @
- Use an @ sign to tag another user in your tweets.
- If you begin a tweet with an @tag then it is only published to your mutual followers- for best exposure, tag user handles at the end of tweets

### # (hashtag)

- Placing a hash sign next to a buzzword relevant to your post sorts your post into a special feed containing posts using that hashtag.
  - Special Hashtags: Using \$ in front of a stock symbol will file your post into a StockTwits feed. See the StockTwits Futures Symbol hashtag directory at <http://stocktwits.com/futures-directory>
  - #FF on Friday, use this tag to show twitter love to your fans, PR targets, or any other interesting users to tell your own follower to follow the people you tagged.
  - Example: @FCMExampleCompany #jobsreport just released #unemployment up 0.5%. Watch out #bulls this may send the market reeling \$ES\_F

## Retweet

- When you retweet a tweet, that tweet is tweeted out to your followers, and the person with the original tweet will be notified that you retweeted them.
- Use retweet to let a user know you appreciate their contributions on Twitter-> the right amount of retweeting generates goodwill towards the people you retweet, and tells your own followers that you are interested in informing your followers about content that you find interesting beyond your own content

## Favorite

- Favoriting a Tweet notifies the user who tweeted that you liked the tweet, but it is not retweeted to your followers

## Quote

- If you want to retweet a person on Twitter, but want to also contribute your own opinion, you can choose to quote the tweet instead of retweeting that gives you space within the character limit to add your own thoughts.

## Using Hashtags

- **Popular hashtags**

#ags #Bull #Bear #marketwatch #inthiseconomy #riskmanagement #commodities #investing #financial #futures

**Example:** Join @theniba members at the 25th Anniversary Chicago Conference #futures #compliance <http://ow.ly/IC64303t1I0>

- **Dissecting the tweet**

Every hashtag puts this tweet into those hashtag streams. Anyone who searches under that hashtag may see that tweet.

- disseminates your tweet outside of your smaller network of influence
- It is *nice* when hashtags are in the context of the tweet but they don't *have* to be

## Using the Search Bar

- The search bar allows you to search for keywords, hashtags, and people, related to your business
- You can search locally or nationally
- Helpful tool to find followers and industry related conversations

## Tagging Users in Your Tweets

- The @ sign added to any Twitter handle will tag that person in your tweet
- Tag people in the middle or at the end of a tweet
- @ sign is how users give virtual shout outs, support your followers, promote events—find creative ways to lend your voice to your community. This is an excellent opportunity to humanize your business.

### Example Tweet:

- See how #futures #marketing is evolving for #FCMs with panelist @shanestiles at the NIBA Chicago Conference <http://ow.ly/5yJo303t3h2>
- Dissecting the tweet: Tagging Shane Stiles and using the hashtag for futures did two important things: 1) it notified Shane that he was being tweeted about so that he can join the conversation, and 2) it also used relevant hashtags so people interested in the topic could participate. This generates more exposure and ultimately more followers.

## Retweeting

Retweeting is an endorsement. It's like fist-pumping or high fiving people in the Twittersphere. Retweeting is also tends to be a reciprocated action among familiar twitter users.

- When you run your mouse over a tweet, the retweet button appears in the bottom right hand corner. When you want to retweet someone, click that button. That tweet now appears in the twitter feed of those who follow you.

### Example Retweet:



## Favoriting a Tweet

Favoriting a tweet is a way to endorse or show some twitter love but it DOES NOT retweet out to your followers. It is more private. Sometimes it is nice to let someone know you appreciate what they are contributing without clogging your followers feed with people they don't necessarily follow. If you are really feeling the twitter love- make sure to strike a balance between favorites and retweets!

## Quoting a Tweet

Quoting a tweet allows you to retweet something to your followers, tag the original user, and allow you to add your own spin to the tweet. Quoting is great if you want to start or join a conversation and you think your followers would want to weigh in on as well.

## Categorize!

Twitter has a fantastic function that allows you to sort users into categories

### Categories could be (but are not limited to):

- Bloggers
- Brokers
- Pundits
- Networks

### What happens when you create a list?

- A list only shows the tweets of people you put in that list.
- It is easier to see what kinds of conversations people are having in different spheres of your business.

## Building a Following

### Why do you follow people on Twitter?

- Because they offer informed, substantial, engaging tweets related to your interests

### Build a following by

- Tweeting often

- Tweeting questions, open ended observations that encourage people to interact with you
- Tweeting interesting or informative articles out to followers
- Always interacting with people who interact with you
  - If someone retweets you or replies to your tweet, make sure you respond appropriately
- Letting people know you are on twitter
  - Send it out to your email list/newsletter
  - Put it on your business cards
  - Make sure there are follow buttons on your blog and website

## Sample Twitter Schedule

- **Schedule 6 tweets a day**
  - 2 tweets about your brand
  - 2 tweets directed at either a blogger/person/brand
  - 2 tweets about something relevant to your target audience. It could be market related, something a pundit observed (make sure you shout them out), a blog post you liked, or your own market observations (in addition to your blog)
- **Join a twitter conversation 2 times a day**
  - answering a question someone else poses
  - Quoting a tweet
  - Retweeting/favoriting a tweet
  - Responding to someone's picture they posted
- **Find 5 new people to follow/day**



## Tweet Categories

Types of Tweets	Description
Tweeting about your brand	This could be a tweet to publicize a new blog post. You could also tweet about a new service offering or an important company announcement
Tweeting at a person/blogger/brand	Tweet a response to another person's market observation on Twitter, You could respond to a question posted on Twitter, you could also offer support or congratulations when you see something good happen to one of your followers
Tweeting about relevant market observations	Along with publicizing your blog posts, if the market does something noteworthy, that is also something tweet worthy! Tweet out observations to your followers
tweeting important news	If there is something happening in the news that is going to affect the market, make sure you are tweeting the news out to followers.

## Categories and Example Tweets

Categories	Example tweets
Tweeting about your brand	<p>Your #silver investment may be side-winding, but we think you should hold on- More here: <a href="http://www.ourcompanyblog.com">www.ourcompanyblog.com</a></p> <p>You don't have to fly solo as a #self trader- Check out some of these edu opportunities #ourcompany <a href="http://www.ourcompanyblog.com">www.ourcompanyblog.com</a></p> <p>Is your #futures outlook hazy? Find some clarity in today's blog post on the British pound <a href="http://www.ourcompanyblog.com">www.ourcompanyblog.com</a></p>
Tweeting at a person/blogger/brand	<p>Commented on <a href="#">@StockTwits</a> (insert hyperlink) anyone else with me on this? #bullish #upswing</p> <p><a href="#">@atwitterhandle</a> potential for new uptrend I think. Chart also shows #MACD divergence on the double bottom test &amp; rising MACD \$ZB_F #bonds</p> <p><a href="#">@afollower</a>, I think you might be right there. #CME launching RMB #futures market could spell trouble for the #dollar</p> <p><a href="#">@afollower</a> Congrats on the <a href="#">#newbaby</a>. Cutest <a href="#">#conehead</a> in the bunch</p>

Categories	Example tweets
Tweeting about relevant market observations	<p>How did #SBX get into the #JCP fray?</p> <p>Gold fell out of bed today this changes the situation <a href="http://tinyurl.com/link6">http://tinyurl.com/link6</a> \$GC_F #gold</p> <p>\$ES_F <a href="#">Tradeflow</a> #delta positive 10k bot on the offer, #<a href="#">macd</a> confirming over +50 on lift higher, primary long trend continues</p> <p>\$ES_F #execution skills example on todays lows noted in @<a href="#">eminiexchange</a> w/ #<a href="#">macd</a> divergence. \$CL_F Rallies hard out #bear flag stops out shorts above 80.</p>
Tweeting important news	<p>WSJ report linking new commodities surge with China- interesting thought here. <a href="http://on.wsj.com/198FUaK">http://on.wsj.com/198FUaK</a></p> <p>Stock Market Bubbles And Record Margin Debt: A (Repeating) History Of Ignoring All Warnings <a href="http://tinyurl.com/ms4u5uh">http://tinyurl.com/ms4u5uh</a></p> <p>Fourth Hindenburg In Five Days Closes Dow Near Worst Week Of The Year <a href="http://tinyurl.com/lu5dsrc">http://tinyurl.com/lu5dsrc</a></p>

## Tweet Strategy

**Your followers will not want to only see your self-promotional material. We suggest the 7-to-1 rule:**

A good rule of thumb to maintain messaging balance between thought leadership and self-promotion is to follow the formula that for every 7 informational or news-sharing Tweets you can post a self-promotional call to action (i.e. Open an account with us)

## Measurement and Analytics

*You can't manage what you don't measure.* If you want to manage your success on Twitter, you need to measure what's working and not working. You can do that for FREE with Twitter's built-in analytics tool.

If you're logged into Twitter, you can find Analytics under **Profile and Settings**.

It's super useful, giving you metrics like:

- Tweet performance
- Follower growth
- Follower interests
- Monthly highlights

- And more...

The data can help you understand how well your tweets are performing -- and give actionable insights.

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Have questions about this guide?

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