

Kickstart Your Facebook & Instagram Ad Strategy



WELCOME

Thank you for taking the time to review this Facebook & Instagram Ads Cheat Sheet.

I'm excited to share the same guide that I've used as a blueprint for the countless businesses I've advised on their paid social strategy.

Whether you're getting ready to run your very first campaign ad or looking to refine your strategy, I've provided a comprehensive guide to help you get started or in some cases audit your existing setup.

I hope you continue to use this Cheat Sheet as a reference as you build your business' presence on Facebook & Instagram.

There is no "silver bullet" when it comes to succeeding on Facebook. It takes patience and a "test and learn" mentality.

Follow this guide, don't take shortcuts, and set yourself up for success.

Thank you,
Erin



Phase 1: Set Your Foundation

Your Customer

- Get Clear About Your Ideal Customer
- Create Audience Persona(s): Define your audience for smarter targeting
- Do Your Research: Creating a buyer persona for your business will help identify the ideal type of customer so you can produce effective content and hone in on potential clients.

Website

- Ensure Your Website Is Mobile-Friendly
- Include Social Plugins (LinkedIn, Facebook, Instagram, Pinterest)
- Highlight Promotions & Shipping On Homepage (if applicable)
- Add An Email Newsletter Subscription Opt-In

Know Your Goals

- Establish Your Business Goal (Awareness, Leads, Purchases, etc)
- Determine What Success Looks Like:
 - How much are you willing to pay for a new customer?
 - How much is a lead worth?
 - How much will you pay for a new purchase
 - What is an acceptable clickthrough rate?

Phase 2: Facebook Essentials

Facebook Page & Instagram Account

In order to run ads on Facebook or Instagram, you'll need to have a **Facebook Page**. Once you've set up your Facebook Ad account and Facebook Page, you can also link your Instagram Account to run ads across Instagram.

Ad Account Setup

- Create a Business Manager Account
- Create an Ad Account
- Add Your Ad Account to Business Manager
- Assign Users to Business Manager
- Setup Primary and Secondary Payment Options

Facebook Pixel

- Create Your Facebook Pixel
- Install The Facebook Pixel On Your Website
- Ensure Your Pixel Is Firing With Pixel Helper
- Setup Your Product Catalog For Dynamic Ads

Phase 3: Targeting & Audiences

There are 3 targeting categories available to businesses. These can be used separately, combined, or as exclusion audiences.

1.) Core Audiences

These audiences leverage Facebook & Instagram data to reach your ideal customer. The categories include:

- Location
- Demographics
- Interests
- Behavior
- Connections

2.) Custom Audiences

Connect with people who have already shown an interest in your business.

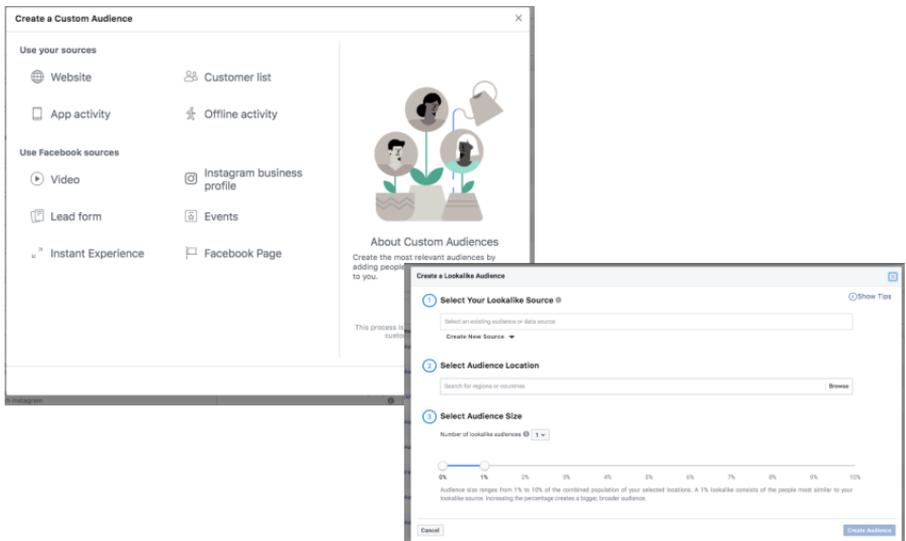
- CRM: Import Your Email List (.CSV)
- Pixel: Based off of Website Traffic, Website Purchases, etc)
- App Usage: Using Facebook SDK data you can target app users
- Engagement: Based off of FB & IG activity including Video Views, Instagram Profile, and Facebook Profile Engagement.

Phase 3: Targeting & Audiences

3.) Lookalike Audiences

Reach new people who are similar to your existing customers. Using your Custom Audiences you can create Lookalike Audiences to expand your targeting while reaching qualified prospects.

- Create Lookalike Audiences from each "Custom Audience Source" in Ads Manager
 - Lookalike Audiences can be created in the "Audience" section of your Ads Manager dashboard or directly within the ad creation process



Phase 4: Campaign Planning

Campaign Objectives

Facebook's advertising objectives help you reach your business goals. Your advertising objective is what you want people to do when they see your ads. For example, Awareness is focused on getting people introduced or interested in your business.

Awareness	Consideration	Conversion
 Brand awareness	 Traffic	 Conversions
 Reach	 Engagement	 Catalog sales
	 App installs	 Store traffic
	 Video views	
	 Lead generation	
	 Messages	

Platforms

Facebook the company now encompasses more than the Facebook mobile and desktop app. Businesses now have the ability to advertise on Facebook, Instagram, Messenger and Audience Network, Ads are setup in Ads Manager and the platforms/placements are selected during the creation process.

Phase 4: Campaign Planning

Ad Formats:

- Image Ads
- Video Ads
- Carousel Ads: 3+ images or videos
- Stories Ads
- Dynamic Ads: Collection, Carousel
- Search Ads (NEW)

Ad Placements:

The places where you can run your ads are called Placements. Depending on the objective you choose when you create your campaign, your ads can appear on Facebook, Instagram, Messenger and Audience Network.

- Feed: Scrolling through inbox, desktop or mobile feeds.
- Stories: Stories on Facebook, Instagram and Messenger.
- In-Stream: Before, during, or after video content.
- Facebook Search Results: Next to relevant search results.
- Messages: Sponsored ads in Messenger
- In-Article: Facebook articles.
- Apps and Sites: External apps and websites.

Phase 5: Creative Recommendations

Relevant and engaging creative is key to a successful campaign on Facebook & Instagram.

Mobile First

Focusing on mobile first creative will enable you to activate more users into your marketing funnels, at a more cost-effective rate.

Branding

Make sure your brand is front and center (i.e logo/color scheme) so your audience is more likely to recall the brand later on.

Focal Point

Have a clear message and focal point when using images. Product-focused creative drives business results more efficiently, with 71% more content views versus creatives without a clear product focus.

Add Movement

As more and more advertisers compete for attention on the platform your video not only has to stand out but has to be relevant. Videos should stay within the 30 second timeframe.

Limit Text

If you must use text on your image, try a smaller font and fewer words to lower the proportion of text to image

Provide Context

Make the process transparent and tell your target audience exactly what you want them to do.

Phase 5: Creative Resources

In a perfect world we'd all have an in-house creative team but that's not the reality for most businesses. Not to worry, there are resources available to help businesses and brands create engaging content on Facebook & Instagram.

Recommended Creative Tools:

- Canva
- Adobe Spark
- Facebook Ads Manager
 - Templates
 - Shapes, Stickers, & Logos
 - Text Overlay Tool
 - Image Cropper
 - Color Filters
- Instagram Stories
- Facebook's Mobile Studio
- Facebook's Creative Hub

Phase 5: Messaging

Messaging by Customer Stage:

To scale on social or any digital marketing channel it's important to bring in new qualified traffic that will eventually move down to the funnel.

That means speaking to potential clients, past website visitors, and previous customers. Don't make the mistake of only speaking to past customers or website visitors.

- Brand Awareness: Introduce your business
 - What is your mission?
 - What is your unique value proposition?
 - What problem do you solve?
- Consideration: Provide value
 - Blog posts on your website
 - Highlight collections/products
 - Share product details
- Conversions: Focus on the final conversion
 - Product benefits
 - Free Shipping/Promotions
 - Limited Offers
 - Testimonials

NEXT STEPS

Are you ready to take the next step to elevate your digital marketing strategy?

Let's chat: <https://www.shorebird-media.com/contact>

Ways We Can Work Together:

- **Account Audit:** Are your Instagram & Facebook campaigns underperforming? We'll provide a comprehensive audit of your ad account history and structure to provide actionable recommendations that will immediately improve performance.
- **Marketing Strategy:** Comprehensive paid acquisition strategy that both engages your audience and converts them into loyal customers
- **Done-With-You:** Shorebird Media works collaboratively with business owners and in-house teams to support and execute successful digital advertising programs.
- **Done-For-You:** End to end campaign management includes audience development, campaign setup, optimizations and analysis.