



ComfortReady HOME

Real Comfort. Real Savings. Real Smart.

How to Create a Lead Generating Social Media Ad Campaign

Updated November 2023



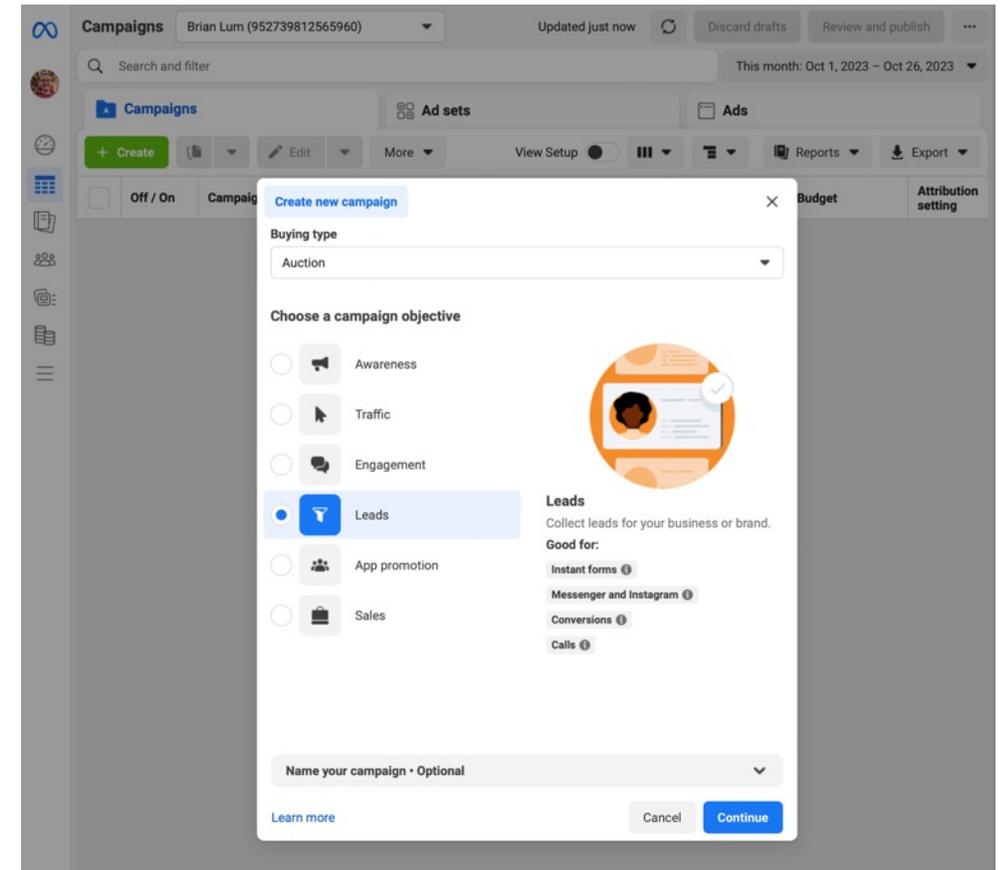
Creating a lead-generating ad campaign on Meta, the platform that includes Facebook and Instagram, is a quick and easy way to put your business in front of thousands of potential customers near you. Contractors can take advantage of a new ad format designed to help users request quotes directly from interactive ads within the Instagram app — no need to call, email or fill out lengthy forms. These ads can be placed for as little as \$5 a day.

The following step-by-step instructions will help you develop a quick and cost-effective ad campaign that focuses on creating engaging and immersive Instagram Reels and Stories.

If you get stuck or have questions, reach out to your [Comfort Ready Home Field Specialist](#) for customized marketing support.

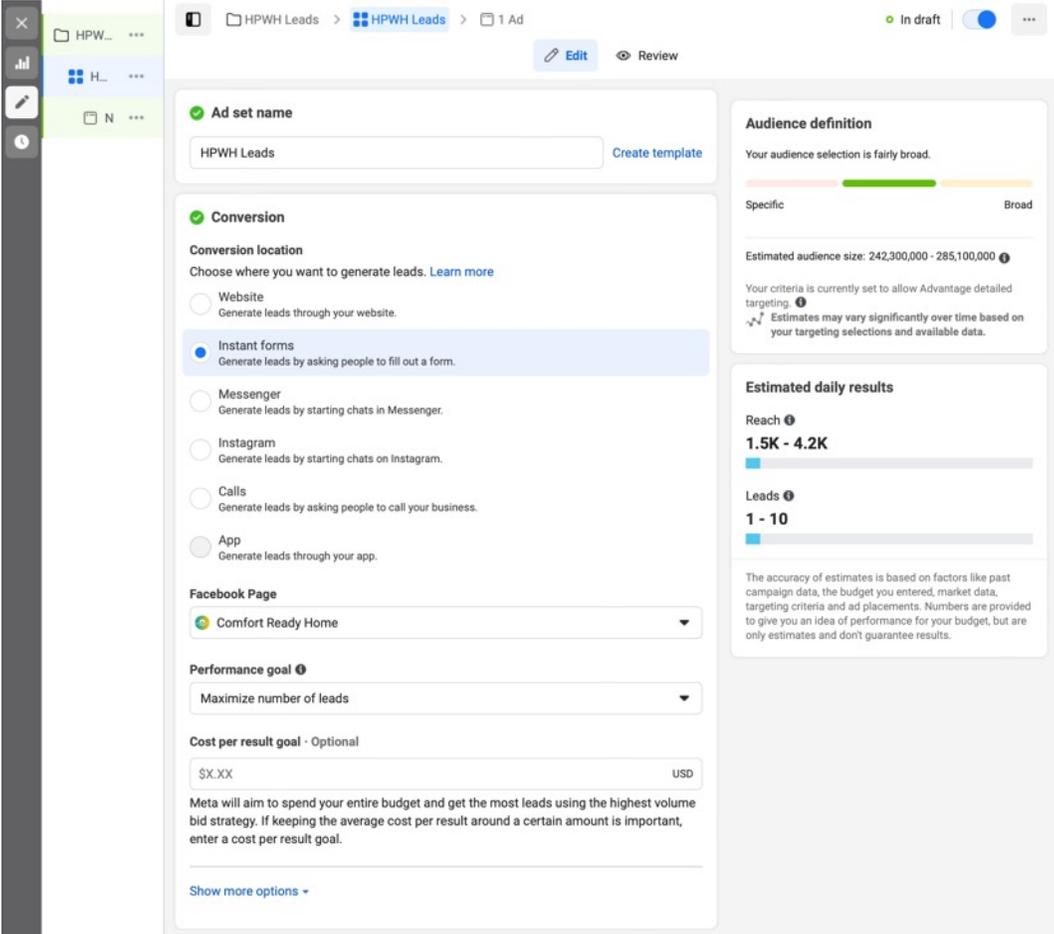
Start in the Facebook Ads Manager

1. Go to <https://adsmanager.facebook.com>
2. Click the green “+ Create” button to start a new campaign
3. Select “Leads” from the pop-up menu and click “Continue”



Develop a new ad set

1. Name your campaign and click “Next”
2. On the next page, name your ad set and choose “Instant forms” from the list of conversion options
3. Make sure the correct Facebook Page is selected



The screenshot shows the Facebook Ads interface for creating a new ad set. The breadcrumb navigation at the top indicates the path: HPWH Leads > HPWH Leads > 1 Ad. The ad set name is "HPWH Leads". The conversion location is set to "Instant forms". The Facebook Page is "Comfort Ready Home". The performance goal is "Maximize number of leads". The cost per result goal is optional, set to "\$X.XX USD". The audience definition is "fairly broad" with an estimated audience size of 242,300,000 - 285,100,000. The estimated daily results show a reach of 1.5K - 4.2K and 1 - 10 leads.

HPWH Leads > HPWH Leads > 1 Ad

In draft

Edit Review

Ad set name

HPWH Leads [Create template](#)

Conversion

Conversion location

Choose where you want to generate leads. [Learn more](#)

Website
Generate leads through your website.

Instant forms
Generate leads by asking people to fill out a form.

Messenger
Generate leads by starting chats in Messenger.

Instagram
Generate leads by starting chats on Instagram.

Calls
Generate leads by asking people to call your business.

App
Generate leads through your app.

Facebook Page

Comfort Ready Home

Performance goal

Maximize number of leads

Cost per result goal - Optional

\$X.XX USD

Meta will aim to spend your entire budget and get the most leads using the highest volume bid strategy. If keeping the average cost per result around a certain amount is important, enter a cost per result goal.

[Show more options](#)

Audience definition

Your audience selection is fairly broad.

Specific Broad

Estimated audience size: 242,300,000 - 285,100,000

Your criteria is currently set to allow Advantage detailed targeting. [Learn more](#)

Estimates may vary significantly over time based on your targeting selections and available data.

Estimated daily results

Reach [Learn more](#)

1.5K - 4.2K

Leads [Learn more](#)

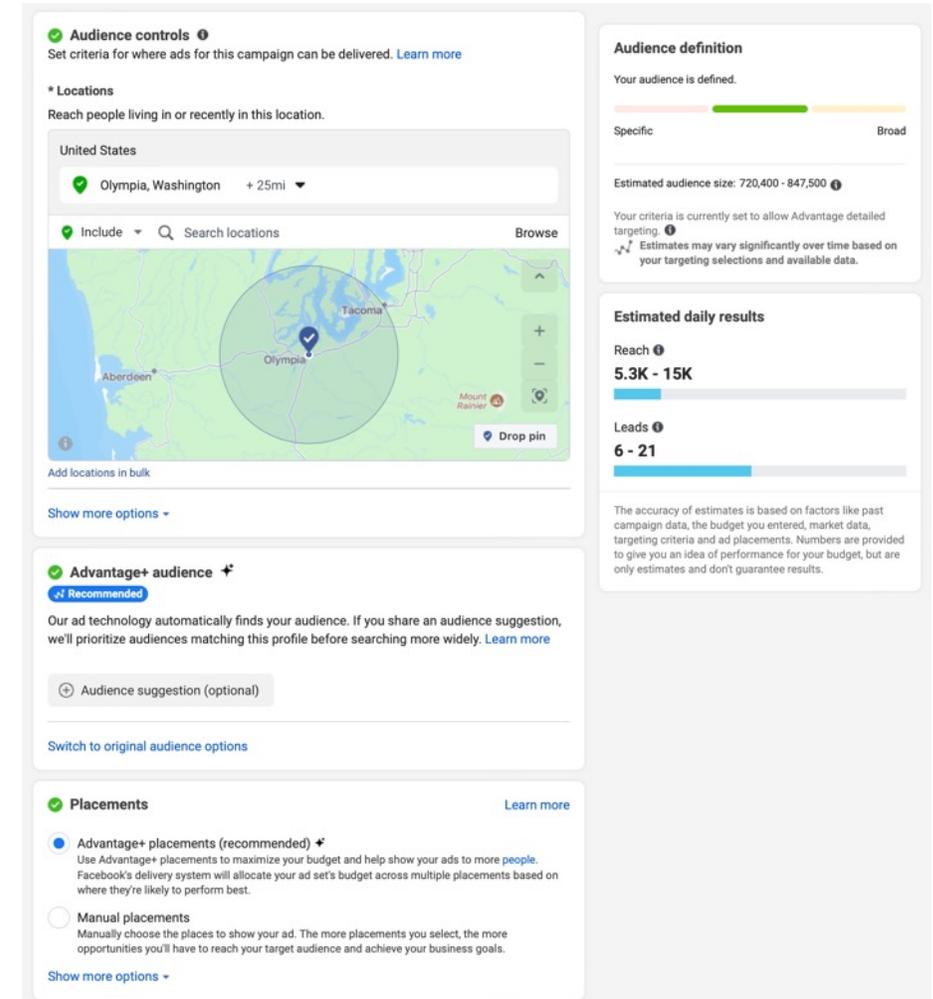
1 - 10

The accuracy of estimates is based on factors like past campaign data, the budget you entered, market data, targeting criteria and ad placements. Numbers are provided to give you an idea of performance for your budget, but are only estimates and don't guarantee results.

Set a budget and define your audience

1. Choose a daily or lifetime budget for your ads
2. Set start and end dates
3. Use the location tool to search for cities or ZIP codes in your service territory

Note: Your budget can be adjusted at any time and it may be limited by Meta if you are a new advertiser. Use the audience definition and estimated daily results in the panel to the right as a rough guide.



Audience controls ⓘ
Set criteria for where ads for this campaign can be delivered. [Learn more](#)

*** Locations**
Reach people living in or recently in this location.

United States
Olympia, Washington + 25mi

Include Search locations Browse

Map showing location targeting around Olympia, Washington. Includes labels for Aberdeen, Tacoma, and Mount Rainier. A blue pin is placed on Olympia with a 25-mile radius circle.

Add locations in bulk
Show more options ▾

Advantage+ audience ✦
Recommended

Our ad technology automatically finds your audience. If you share an audience suggestion, we'll prioritize audiences matching this profile before searching more widely. [Learn more](#)

Audience suggestion (optional)

Switch to original audience options

Placements [Learn more](#)

Advantage+ placements (recommended) ✦
Use Advantage+ placements to maximize your budget and help show your ads to more people. Facebook's delivery system will allocate your ad set's budget across multiple placements based on where they're likely to perform best.

Manual placements
Manually choose the places to show your ad. The more placements you select, the more opportunities you'll have to reach your target audience and achieve your business goals.

Show more options ▾

Audience definition
Your audience is defined.

Specific  Broad

Estimated audience size: 720,400 - 847,500 ⓘ

Your criteria is currently set to allow Advantage detailed targeting. ⓘ
Estimates may vary significantly over time based on your targeting selections and available data.

Estimated daily results

Reach ⓘ
5.3K - 15K

Leads ⓘ
6 - 21

The accuracy of estimates is based on factors like past campaign data, the budget you entered, market data, targeting criteria and ad placements. Numbers are provided to give you an idea of performance for your budget, but are only estimates and don't guarantee results.

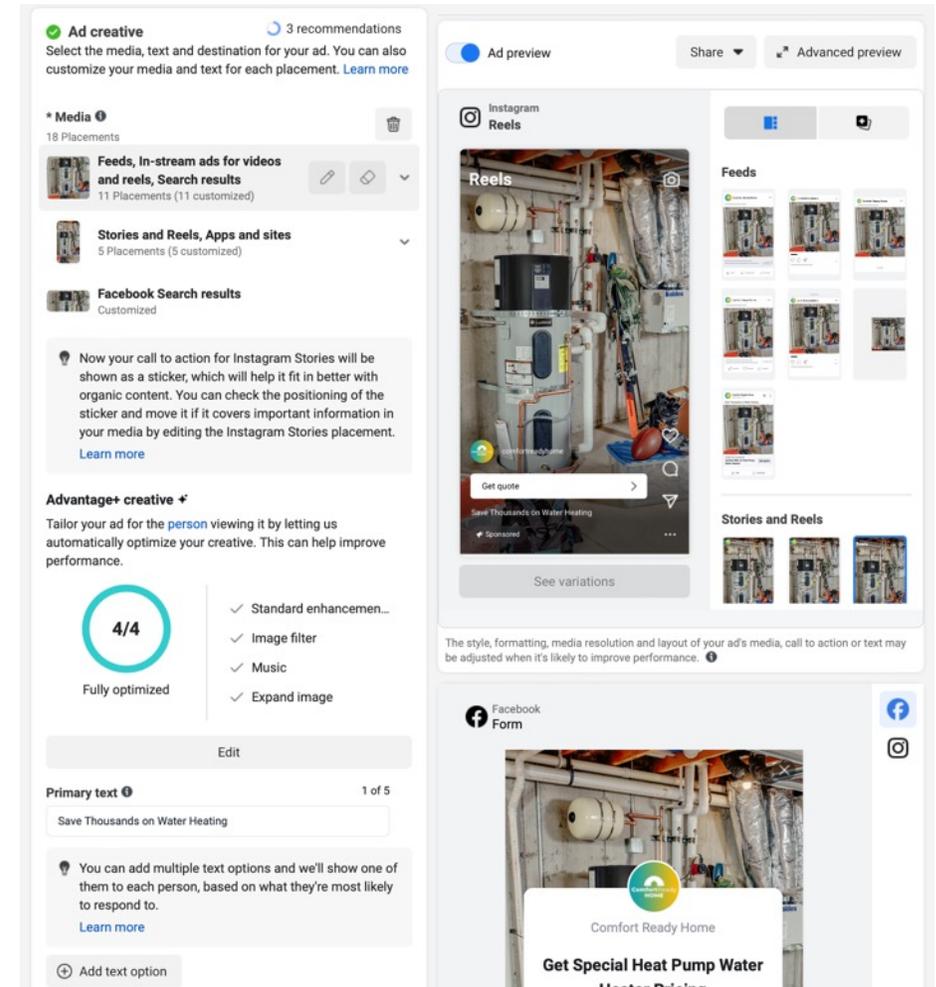
Create your ad

1. Name your ad and make sure the correct Facebook and Instagram pages are selected
2. Select the image(s) and/or video(s) for your ad

Tip: Use a vertical image that works well on Instagram Stories and Reels.

3. Write the primary text, headline and description, using the ad preview to the right as a guide

Tip: You have a split second to capture your audience's attention, so highlight the **why — if they don't click on your ad, what are they missing? A great new incentive? Or are they settling for a less comfortable home and higher utility bills?**

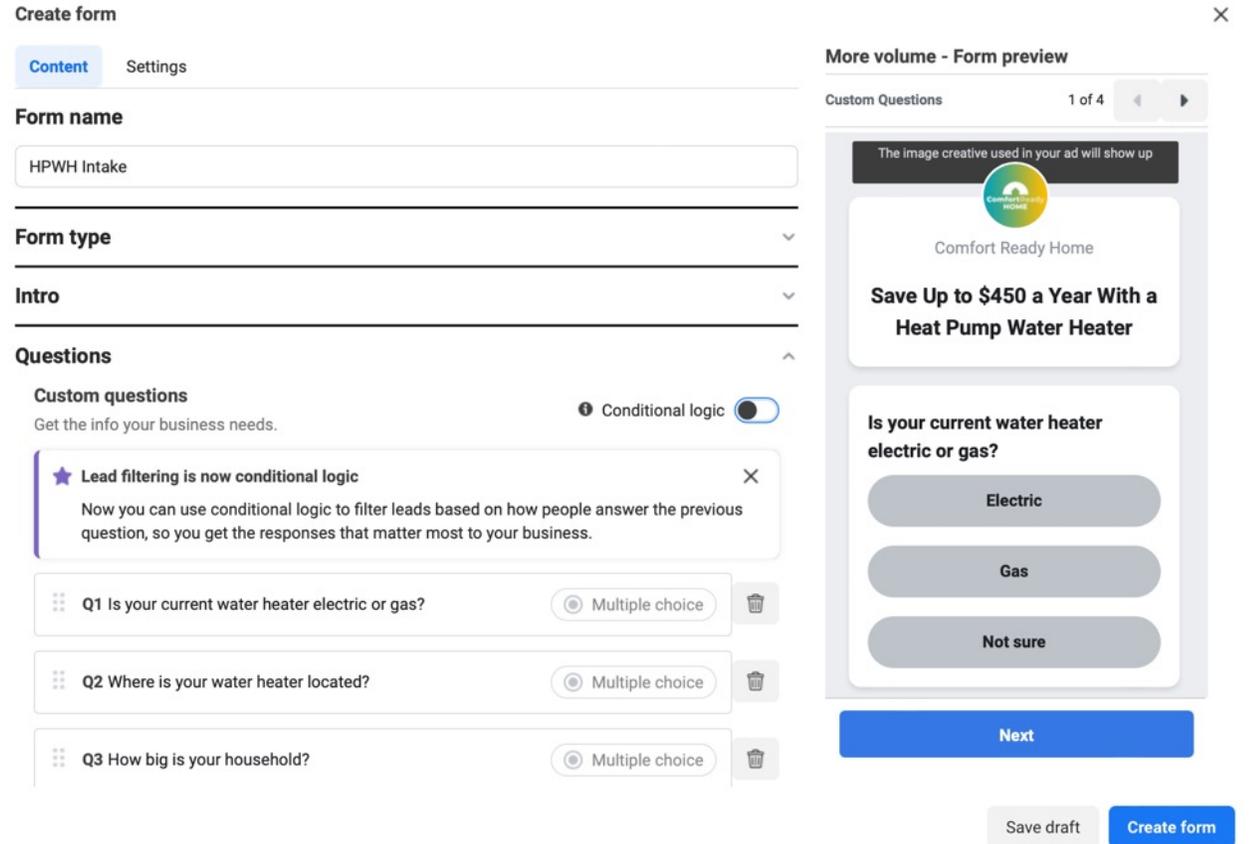


The image shows a screenshot of the Facebook Ads Manager interface. On the left, the 'Ad creative' section is visible, showing 18 placements and a '4/4 Fully optimized' status. Below this, there are sections for 'Advantage+ creative' and 'Primary text' with a text input field containing 'Save Thousands on Water Heating'. On the right, the 'Ad preview' section shows the ad as it would appear on Instagram Reels and Facebook Feeds. The Reels preview shows a vertical video of a water heater with a 'Get quote' button. The Feeds preview shows a horizontal ad with the same video and text. The Facebook Form preview shows the ad with a 'Get Special Heat Pump Water Heater Pricing' button.

Create a Form

1. Choose “Create form” and select “More volume” to create a form that’s easy for users to fill out
2. Choose an image and write a headline for the Intro section
3. Create a few short answer questions that will help you evaluate the lead

Tip: Fewer questions is always better — it will lead to more completed forms and more leads. Think of 2–5 essential questions that will jumpstart the conversation with the customer and allow you to personalize your response.



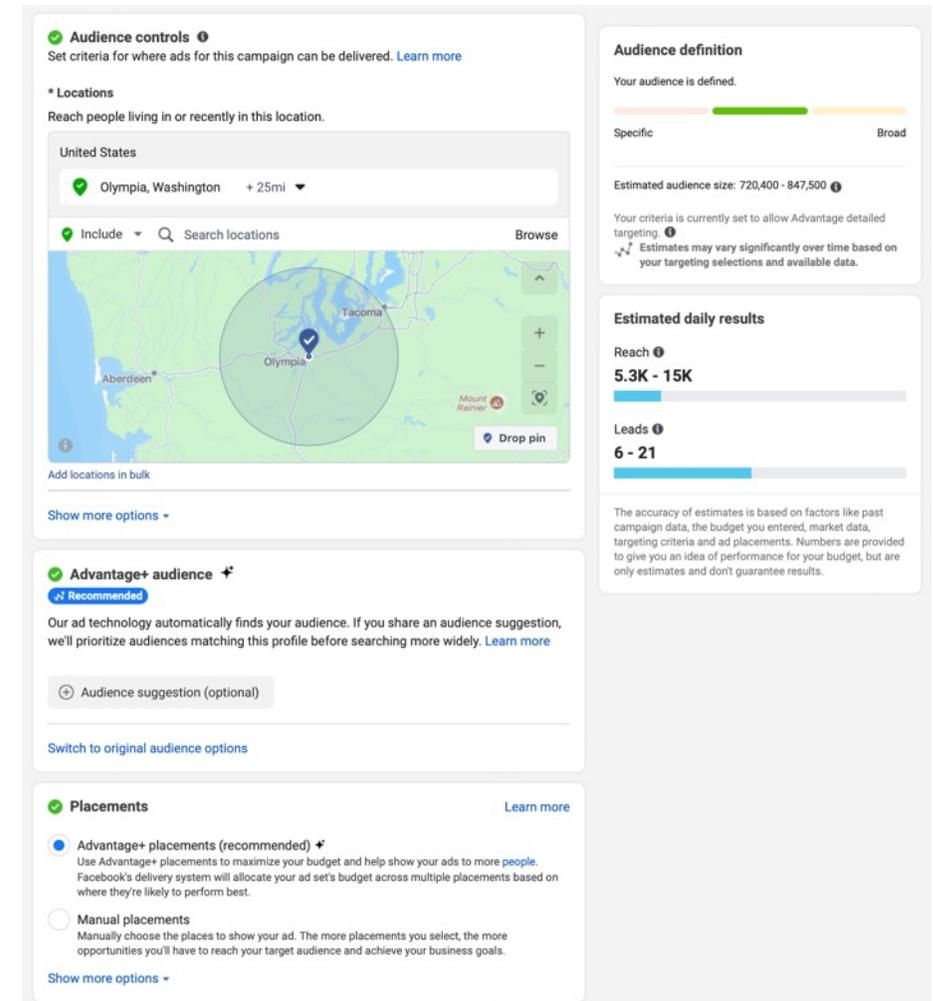
The screenshot displays the 'Create form' interface, divided into 'Content' and 'Settings' tabs. The 'Content' tab is active, showing the following fields:

- Form name:** HPWH Intake
- Form type:** (Dropdown menu)
- Intro:** (Dropdown menu)
- Questions:** A section titled 'Custom questions' with a 'Conditional logic' toggle. A notification box states: 'Lead filtering is now conditional logic. Now you can use conditional logic to filter leads based on how people answer the previous question, so you get the responses that matter most to your business.' Below this are three questions, each with a 'Multiple choice' option and a trash icon:
 - Q1 Is your current water heater electric or gas?
 - Q2 Where is your water heater located?
 - Q3 How big is your household?

To the right, a 'More volume - Form preview' window shows a mobile device view of the form. It features the ComfortReady HOME logo, the headline 'Save Up to \$450 a Year With a Heat Pump Water Heater', and the question 'Is your current water heater electric or gas?' with three answer buttons: 'Electric', 'Gas', and 'Not sure'. A 'Next' button is at the bottom of the preview. Below the preview are 'Save draft' and 'Create form' buttons.

Publish your ad

1. Review your ad and all parameters and adjust as necessary so there are no warnings in the panel to the right
2. Click “Publish” and add a payment method, if necessary
3. You’re all set! Your ads should begin running within 24 hours if you selected an immediate start time.



The screenshot displays the Facebook Ads targeting configuration interface. It is divided into several sections:

- Audience controls:** Includes a "Locations" section where "United States" is selected, and "Olympia, Washington" is chosen with a 25-mile radius. A map shows the target area around Olympia, with Tacoma and Aberdeen also visible. There are options to "Add locations in bulk" and "Show more options".
- Advantage+ audience:** Labeled as "Recommended", it states that Facebook's technology will find the audience. There is an option for "Audience suggestion (optional)" and a link to "Switch to original audience options".
- Placements:** Offers two options: "Advantage+ placements (recommended)" which uses Facebook's system to maximize budget, and "Manual placements" where the user selects specific ad locations.
- Audience definition:** Shows a progress bar from "Specific" to "Broad", with the current setting in the "Specific" range. It provides an "Estimated audience size" of 720,400 - 847,500 and notes that the criteria is set for "Advantage detailed targeting".
- Estimated daily results:** Displays "Reach" as 5.3K - 15K and "Leads" as 6 - 21. A disclaimer at the bottom states that estimates are based on past campaign data and are not guaranteed.

Optimize as you go

Meta will automatically optimize many aspects of your campaign by weighting your budget toward the audience and ad formats that perform best. This can take time, so don't be too concerned if leads are slow to come in at first.

If at any time you would like to end your campaign and stop your ads, use the “Off/On” toggle in [Ads Manager](#).

If you have any questions or need help troubleshooting your ad setup, contact Meta support or reach out to your [Comfort Ready Home Field Specialist](#).

