



ComfortReady HOME

Real Comfort. Real Savings. Real Smart.

How to Create a Lead Generating Social Media Ad Campaign

Updated November 2023



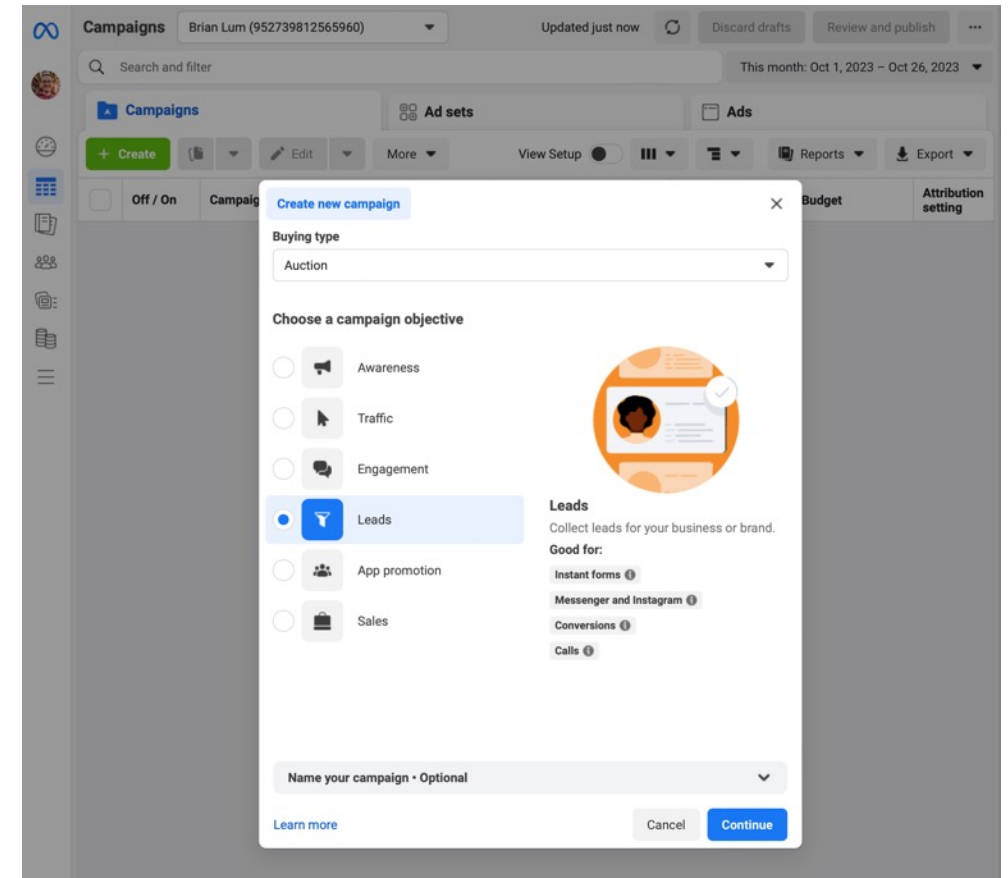
Creating a lead-generating ad campaign on Meta, the platform that includes Facebook and Instagram, is a quick and easy way to put your business in front of thousands of potential customers near you. Contractors can take advantage of a new ad format designed to help users request quotes directly from 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.

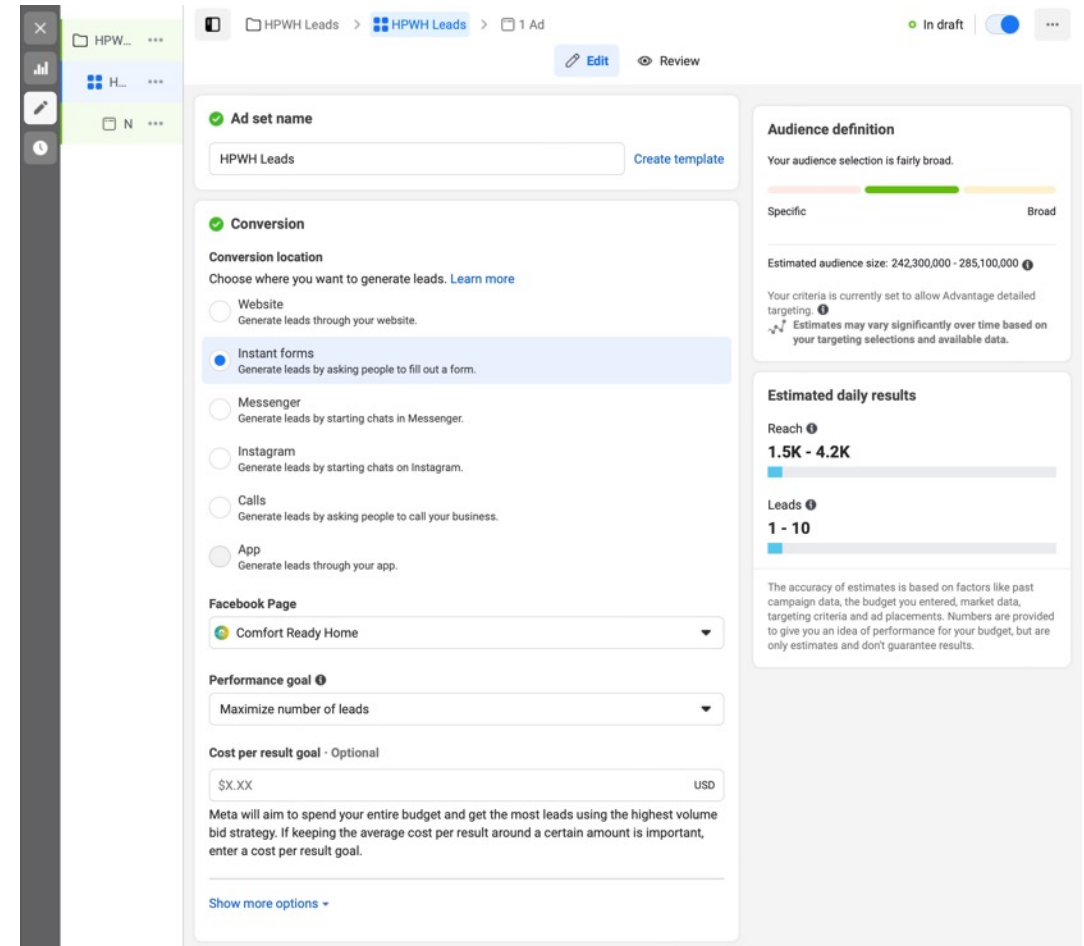
Start in the Facebook Ads Manager

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 'Create new ad set' interface in Facebook Ads Manager. The breadcrumb trail at the top indicates the path: HPWH Leads > HPWH Leads > 1 Ad. The status is 'In draft'.

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

Estimated daily results

Reach
1.5K - 4.2K

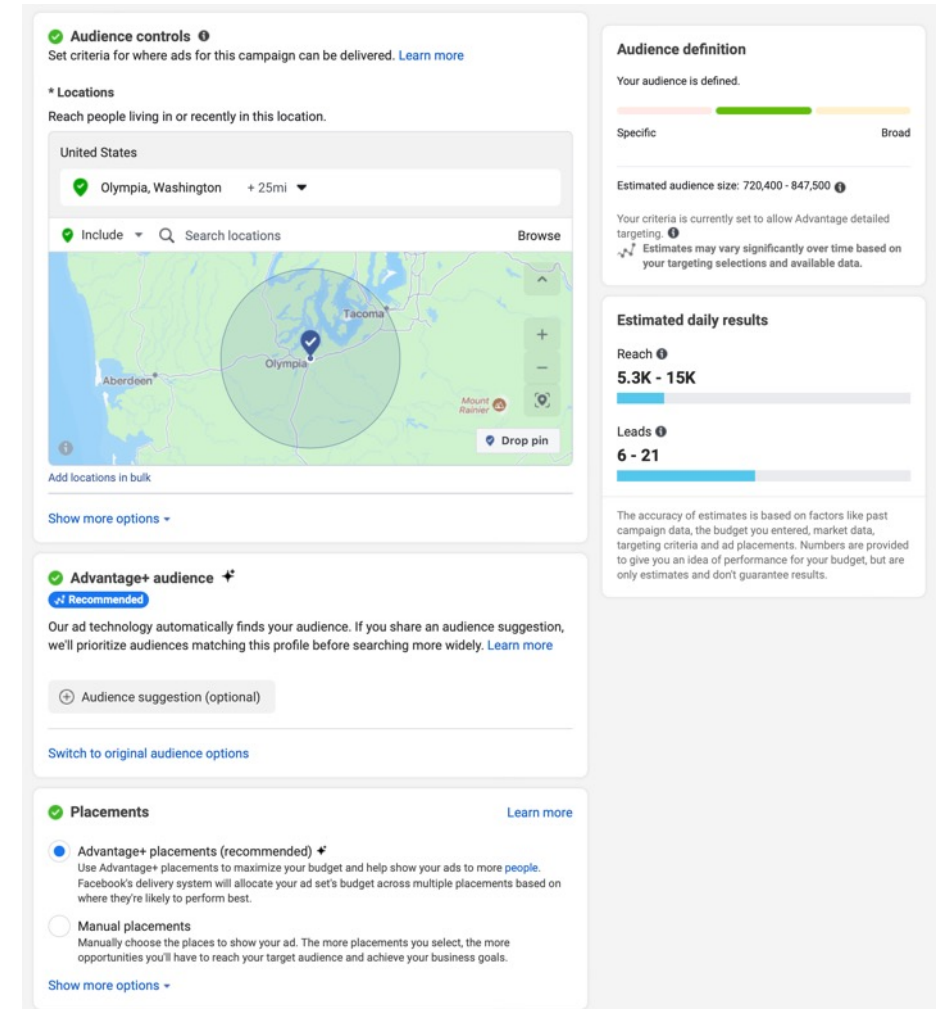
Leads
1 - 10

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.



The screenshot displays the Facebook Audience Definition tool interface. It is divided into several sections:

- Audience controls:** Includes a link to "Learn more" and a section for "Locations" where "United States" is selected. A map shows a 25-mile radius around "Olympia, Washington".
- Audience definition:** Shows a progress bar from "Specific" to "Broad". The "Estimated audience size" is 720,400 - 847,500.
- Estimated daily results:** Displays "Reach" as 5.3K - 15K and "Leads" as 6 - 21.
- Advantage+ audience:** A "Recommended" section with a "Learn more" link and an "Audience suggestion (optional)" input field.
- Placements:** A "Learn more" link and two options: "Advantage+ placements (recommended)" and "Manual placements".

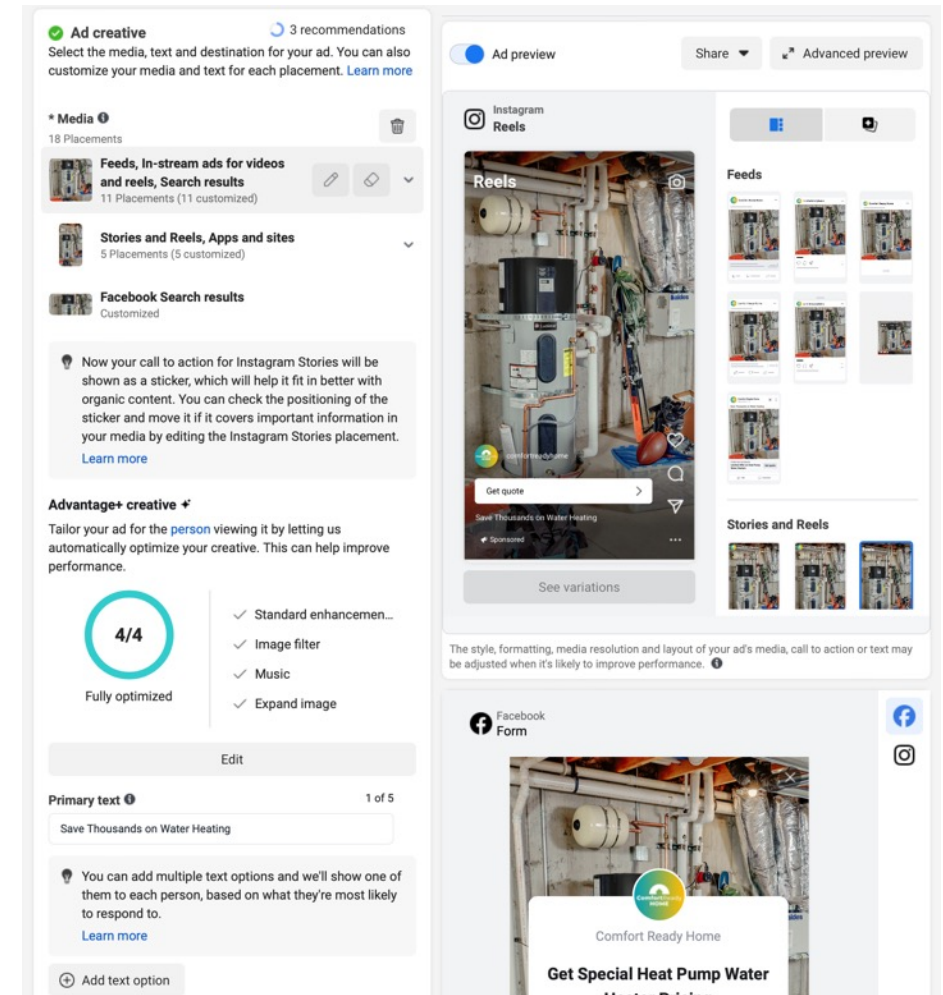
Create your ad

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 displays the Facebook Ads Manager interface for creating a new ad. On the left, the 'Ad creative' section shows 3 recommendations and a 'Media' section with 18 placements. The 'Media' section includes 'Feeds, in-stream ads for videos and reels, Search results' (11 placements, 11 customized), 'Stories and Reels, Apps and sites' (5 placements, 5 customized), and 'Facebook Search results' (Customized). A tip states: 'Now your call to action for Instagram Stories will be shown as a sticker, which will help it fit in better with organic content. You can check the positioning of the sticker and move it if it covers important information in your media by editing the Instagram Stories placement. Learn more'. Below this, the 'Advantage+ creative' section is shown, indicating the ad is 'Fully optimized' (4/4) and listing enhancements: Standard enhancements, Image filter, Music, and Expand image. The 'Primary text' field contains 'Save Thousands on Water Heating'. On the right, the 'Ad preview' section shows the ad as it will 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 image of a water heater with a 'Get quote' button. The Facebook Form preview shows a vertical image of a water heater 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.

Create form

Content Settings

Form name

HPWH Intake

Form type

Intro

Questions

Custom questions

Get the info your business needs.

Conditional logic ☒

★ 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.

Q1 Is your current water heater electric or gas?

Multiple choice

Q2 Where is your water heater located?

Multiple choice

Q3 How big is your household?

Multiple choice

More volume - Form preview

Custom Questions

1 of 4

The image creative used in your ad will show up



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**Save Up to \$450 a Year With a
Heat Pump Water Heater**

**Is your current water heater
electric or gas?**

Electric

Gas

Not sure

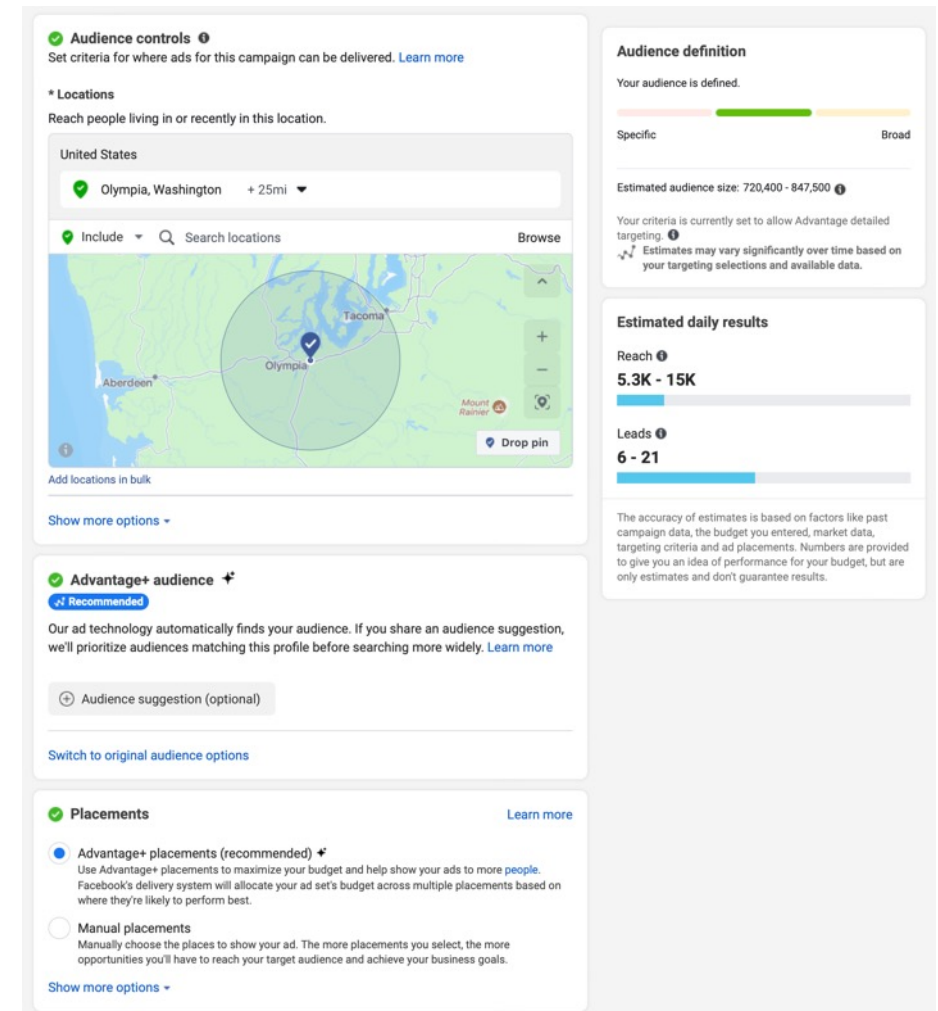
Next

Save draft

Create form

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 campaign setup interface, specifically the Audience and Placement selection stage. It is organized into three main sections on the left and a summary panel on the right.

- Audience controls:** This section allows setting criteria for where ads can be delivered. It includes a "Locations" section where "United States" is selected, and "Olympia, Washington" is chosen with a 25-mile radius. A map shows the selected area around Olympia, with nearby cities like Tacoma and Aberdeen visible. Below the map, there are options to "Add locations in bulk" and "Show more options".
- Advantage+ audience:** This section is marked as "Recommended" and explains that Facebook's technology will automatically find the audience. It includes an "Audience suggestion (optional)" field and a link to "Switch to original audience options".
- Placements:** This section offers two choices: "Advantage+ placements (recommended)" which uses Facebook's delivery system to allocate budget across multiple placements, and "Manual placements" where the user can choose specific places to show the ad.

The right-hand summary panel provides key metrics:

- Audience definition:** Shows a progress bar from "Specific" to "Broad" and an "Estimated audience size" of 720,400 - 847,500.
- Estimated daily results:** Displays "Reach" as 5.3K - 15K and "Leads" as 6 - 21, each with a corresponding progress bar.
- Disclaimer:** A note at the bottom states that the accuracy of estimates is based on factors like past campaign data, budget, market data, and targeting criteria.

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](#).

