

Getting Started With Social Media Advertising: Facebook and Instagram Ads for Beginners

Purpose	This guide outlines processes for configuring, launching, and managing paid advertising on Facebook and Instagram.
Format	This guide describes the steps required to execute three key phases for advertising on Facebook and Instagram.
Audience	Researchers and their support teams can use this guide.
Resources	A planning worksheet appears at the end of this document.

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Introduction

Why Advertise On Social Media?

Your Model System may want to advance its research or develop more products. But funding could be limited, and time may be even more scarce. The Model Systems Knowledge Translation Center (MSKTC) provides technical assistance to support Model Systems as they disseminate their work across a host of communications channels. Social media advertising is a unique tactic to promote such work (Exhibit 1). With a modest financial and time investment, you can develop succinct messages that directly reach members of the ideal audience and drive them to take actions online. You can target specific people who are likely to be interested in your efforts, or those who may not even know your organization or your work. And you can track and adjust efforts in real time—from almost anywhere—to maximize impact.¹

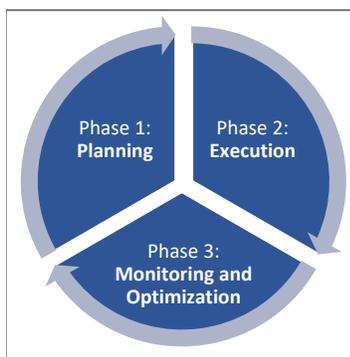
Exhibit 1. Example of a published ad for the University of Pittsburgh SCI Model System.*



What Is in This Guide?

Getting Started With Social Media Advertising was developed to provide your Model System with a step-by-step guide to begin advertising through Facebook’s suite of advertising services,

Exhibit 2. Lifecycle of social media advertising.



including Instagram. (In this guide, the term “Facebook ads” encompasses ads that run across Facebook’s services.) This guide discusses three phases of social media advertising. In the *Planning* phase, you’ll prepare to effectively advertise on social media: What do you hope to accomplish with your advertising? What resources do you need? In the *Execution* phase, you’ll configure and activate your social media ads. The process concludes with the *Monitoring and Optimization* phase. In this phase, you measure the results of your advertising on social media and consider how to optimize your efforts (Exhibit 2).

- **Learn More:** *This guide is intended for Model Systems who have access to an active Facebook or Instagram account. If you don’t have such access,*

¹ All exhibits denoted with an asterisk were obtained from Facebook.

please refer to the [MSKTC Social Media Development Workbook](#) to get started using social media. This guide provides essential instructions for getting started with social media advertising. For more detailed guidance and more methods, refer to the [Facebook Ads Beginner's Guide](#), which is cited throughout this document.

Phase 1: Planning

The vision for your ads will drive the Planning phase. Who do you want to reach? What actions do you want them to take? What resources can you devote to social media advertising? In this section, you'll set goals for your approach to advertising on social media, identify and allocate resources, identify your target audience, and select the social media delivery methods that most effectively meet your goals and reach your audience.

Planning Step 1: Set Goals and Objectives

Establish your overarching goal

In your planning efforts, you must define the goals you want to achieve by advertising on social media. Advertising goals may align with your Model System's priorities, for example,

- Raising awareness of your work;
- Having people access a resource or product;
- Registering people for an event;
- **Best Practice:** Use the SMART model² to develop your goals:
 - *Specific:* Define explicit goals relative to the desired results.
 - *Measurable:* Establish criteria for gauging progress toward goal attainment.
 - *Attainable:* Consider resource restraints that may hinder goal achievement.
 - *Relevant:* Ensure goals are worthwhile to the mission of your Model System.
 - *Time-Based:* Set the goals' timeframe(s) to make them real and tangible.
- Raising funds;
- Engaging stakeholders; and
- Recruiting study participants.

² Adapted from Doran, G. T. (1981). There's a S.M.A.R.T. way to write management's goals and objectives. *Management Review*, 70(11) (AMA FORUM), 35–36.

Define your online advertising objective

In line with your goals, consider the objectives you have for your audience. What actions do you want people to take online to help you achieve your goals? Exhibit 3 offers potential objectives for goals stated previously.

Exhibit 3. Goals and potential online advertising objectives.

Goal	Online Advertising Objective
Raise awareness of your work	Drive people to your website or share a link to a publication to learn more about your work
Drive people to access a resource or product	Drive people to the webpage hosting the resource or to the product to download it
Register people for an event	Drive people to a webpage where they can register for the event
Raise funds	Drive people to a fundraising page so they can make a donation
Engage stakeholders	Drive people to share or comment on your social media post or to follow your social media account
Recruit study participants	Drive people to a webpage so they can sign up to take part in the study

Think about your current social media audience when establishing your objectives. How does your Model System serve this audience? How does this audience interact and engage with your Model System, both online and offline?

- *Learn more about [choosing the right advertising objective](#).*

Planning Step 2: Plan How Your Ads Will Run

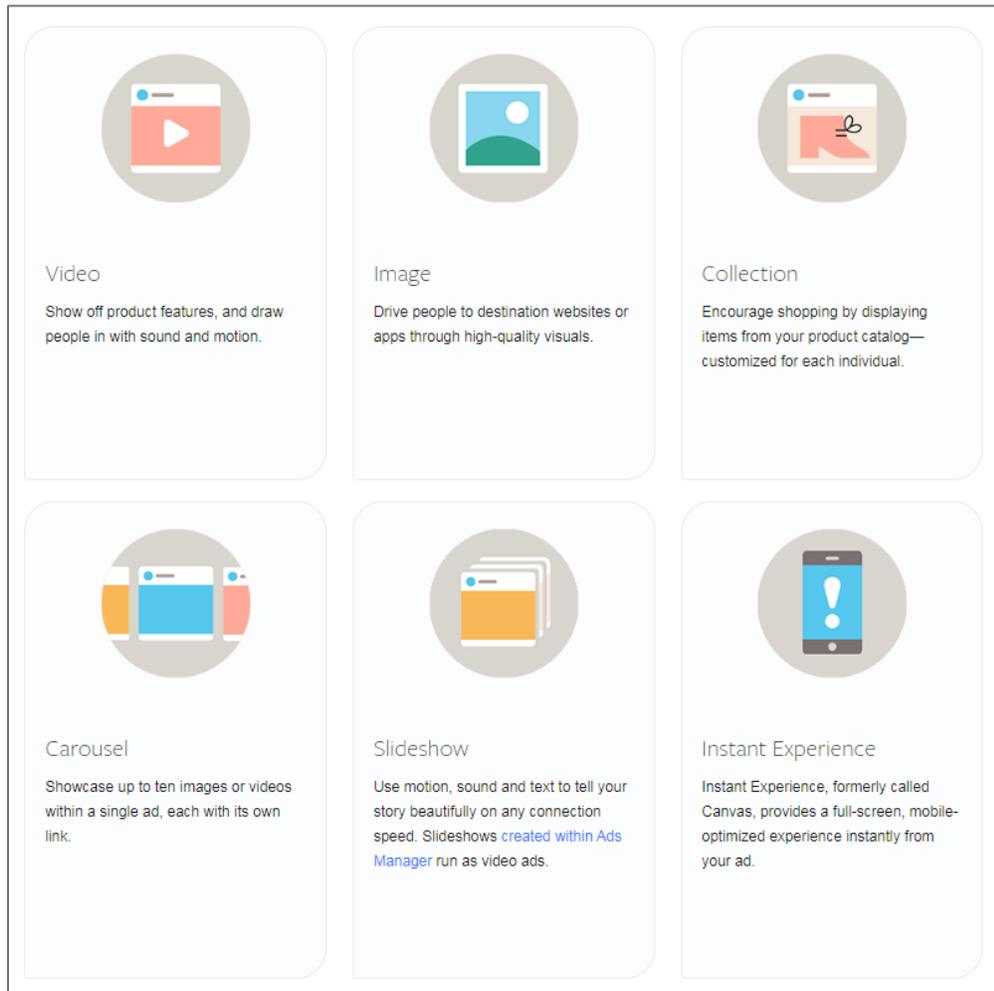
Consider your ad format

Different ad formats can be used across Facebook platforms (Exhibit 4). After selecting your advertising objective, you can choose the right format for your ad. Model Systems may want to consider the following formats:

- *Image ads* show a single image and are useful when you want to capture the attention of your audience.
- *Video ads* can help you engage with your audience and.

- *Slideshow ads* combine multiple images or videos, text, and sound tell a story to your audience. This format allows you to create a high-quality ad without the expenses or challenges of video production.

Exhibit 4. Available ad formats.*



- **Learn more about the various [ad formats](#).**

Define your target audience

Facebook uses *targeting* to help you reach your specific audience. This tactic allows you to define the people you want to see your ad based on their demographics and interests. Audiences can be as broad or as well-defined as you like. You may choose to target your audience based on such factors as:

- *Location*, to reach people in specific cities, communities, and countries of interest;

- *Demographics*, to select an audience based on age, gender, education, job title, and more;
- *Interests*, to choose the interests and hobbies (for example, physical fitness and occupational injury) of the people you want your ad to reach; and
- *Connections*, to reach people who are already connected to your social media pages (or exclude them to find new audiences) or connected to the social media pages of other groups of interest.
- **Learn more about [audience targeting](#).**

Consider your ad placement

The Facebook family offers several outlets to post advertising, for example, Facebook, Instagram, Audience Network, and Messenger. The more you use, the better the results. *Placement* on these outlets can determine the effectiveness of your ads (Exhibit 5).

Exhibit 5. Options for ad placements.*



- Facebook
 - Feed: Ads displayed as posts in Facebook’s main feed
 - Right column: Ads displayed on the right side of the page for Facebook desktop users
 - In-stream videos: Video ads that play automatically in Facebook’s main feed
 - Stories: Full-screen photo and video ads in Facebook
 - Instant articles: Fast and immersive reading experiences on Facebook
- Instagram
 - Feed: Ads displayed as posts in Instagram’s main feed
 - Stories: Full-screen photo and video ads in Instagram
- Messenger
 - Inbox: Ads displayed on the home screen in Messenger
 - Sponsored message: Targeted, in-context ads that re-engage people who have had a conversation with you in Messenger

Ads can be placed automatically or manually.

- *Automatic placements* achieve optimal results across placements. This method is designed to get the best results for the lowest overall cost.
- *Manual placements* let you choose which placements to use.
- *Learn more about options for [ad placements](#).*

Planning Step 3: Configure Resources

Set up a Facebook Ads account

To create and manage your ads, you'll need two accounts:

- An active Facebook or Instagram account and
- A Facebook Ads Manager account

Visit [Facebook Ads Manager](#) to get started.

Determine your budget

Social media advertising can be a cost-effective approach to achieve your advertising goals. Determine your budget before configuring your ads. When you configure ads (explained in *Execution Step 2: Set Up Your Ad*), Ads Manager will estimate the results you can expect for your budget. Later, you can adjust your budget to reach the results you hope to achieve.

- *Learn more about [ad budgets](#).*

Phase 2: Execution

Execution Step 1: Create Your Ad Components

Depending on the ad format and placements you choose, the content and creative material in your ads will have different specifications (i.e. character counts, image size, and file sizes). For beginners, consider creating ads with the specifications outlined below (also see Exhibit 6).

Write your ad copy

When you configure ads (explained in *Execution Step 2: Set Up Your Ad*), the Ads Manager will require you to provide the following:

- A brief *headline* that lets people know the topic of your ad. This headline won't appear in all placements. Headlines are limited to 25–40 characters, but this count may vary based on device and placement. If the headline exceeds 40 character, the text may get cut off when people see your ad in certain placements.

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- A *News Feed link description* that provides more text to emphasize why people should visit your website. This description won't appear in all placements and should be around 30 characters.
- **Best Practice:** People scan Facebook and Instagram Feeds quickly. To best capture your audience's attention, **keep your text short, clear, and to the point** to ensure your message gets across.

Develop creative materials

All Facebook ads include multimedia, either an image or a video, with the following recommended specifications:

- Image: 1200 x 628 pixels in .jpg or .png format
- Video: 5–15 seconds; 4 GB maximum file size

You can create images in desktop programs like Adobe InDesign, or use a free online design program like [Canva](#) (Exhibit 7).

- **Best Practices for creating engaging materials:**
 - **Use vertical or square videos.** Because most people hold their phones vertically, you'll cover more of their screen.
 - **Avoid text on images** and use the text/headline/link description fields instead. Text can cover only a maximum of 20% of an image.
 - **Add multiple images** using the carousel format. Using this format, you can include more images for the same cost.
- **Learn more** about the [various specifications](#) for writing copy and designing creative materials for ads that are optimized across formats and placements.

Exhibit 6. Example of components of ad content.*

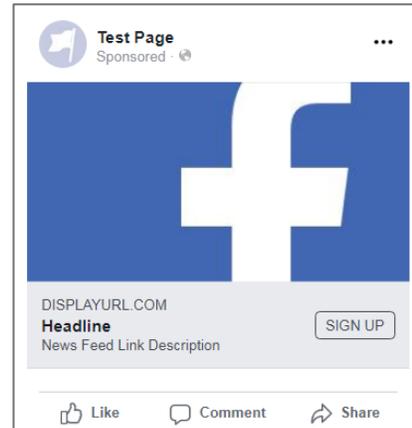


Exhibit 7. Example of an ad image for the University of Pittsburgh SCI Model System.*



Execution Step 2: Set Up Your Ad

Facebook's *campaign structure* consists of three components:

- A *campaign* contains one or more *ad sets* and *ads*. You'll choose one advertising objective for each campaign.
- *Ad sets* contain one or more ads. You'll define your target audience, budget, schedule, and placement at the ad set level.
- The content and creative material you use makes up an *ad*.

Knowing how these work together will help your ads run the way you want.

Get Started

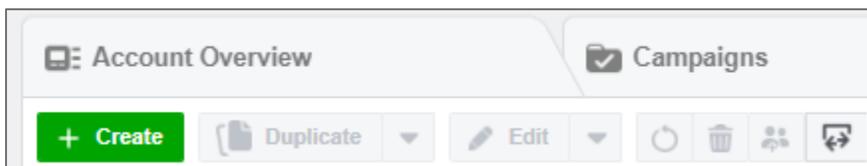
In the Ads Manager, you can choose from two workflows to create and manage your ads:

- *Guided Creation* walks you through the steps to create an advertising campaign and ads from start to finish.
- *Quick Creation* allows you to first set up an advertising campaign and then create the ads later.

Guided Creation is recommended for beginners. Although the Ads Manager contains more options for configuring ads, this guide covers just the required and recommended steps to help beginners get started.

Go directly to the [ad creation workflow](#), or from [Ads Manager](#), select **+Create** to get started (Exhibit 8).

Exhibit 8. +Create button.*



Create a Campaign

First, you'll create a *campaign* by defining your advertising objective at this level.

1. From the list, choose a **Marketing Objective** that aligns best with your goals (Exhibit 9).

Exhibit 9. Marketing objective options.*

Awareness	Consideration
 Brand awareness	 Traffic
 Reach	 Engagement
	 App installs
	 Video views
	 Lead generation
	 Messages

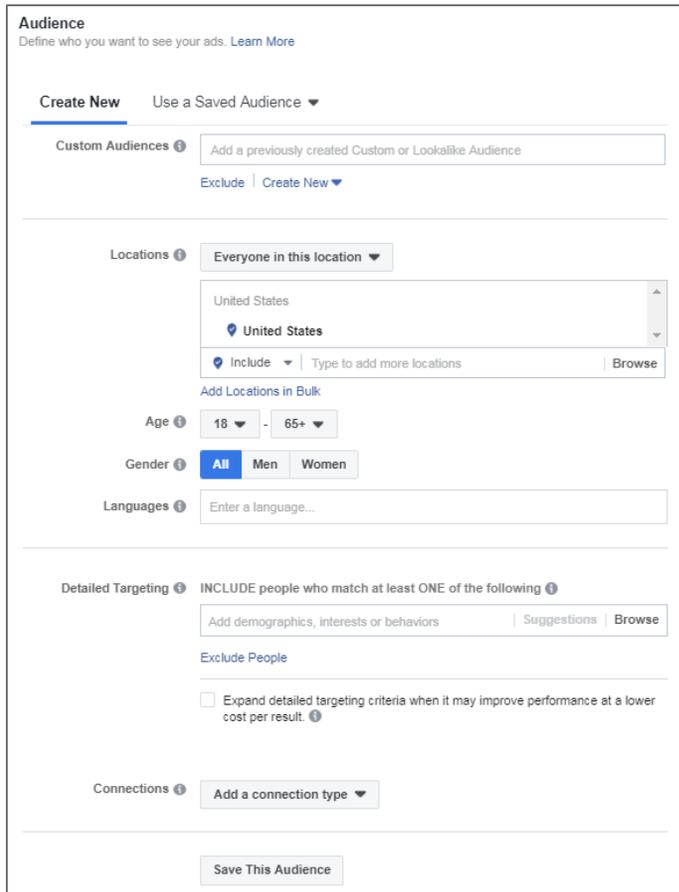
2. Enter a descriptive campaign name in the **Campaign Name** field.

Create an Ad Set

Next, you'll create an ad set by defining your target audience, budget, schedule, bidding, and placement at the ad set level.

1. Enter a descriptive ad set name in the **Ad Set Name** field.
2. Choose your audience by clarifying such characteristics as age, gender, location, interests, and more. You can select to **Save This Audience** for future use (Exhibit 10).

Exhibit 10. Audience targeting options.*



The screenshot shows the Facebook Audience targeting interface. At the top, it says "Audience" and "Define who you want to see your ads. Learn More". Below this are two tabs: "Create New" (selected) and "Use a Saved Audience". Under "Create New", there is a section for "Custom Audiences" with a text input field "Add a previously created Custom or Lookalike Audience" and buttons for "Exclude" and "Create New". The main targeting section includes: "Locations" with a dropdown set to "Everyone in this location" and a list showing "United States" selected; "Age" with a range from "18" to "65+"; "Gender" with buttons for "All", "Men", and "Women"; and "Languages" with a text input "Enter a language...". Below these is the "Detailed Targeting" section, which is set to "INCLUDE people who match at least ONE of the following". It has a text input "Add demographics, interests or behaviors" and buttons for "Suggestions" and "Browse". There is also an "Exclude People" section with a checkbox for "Expand detailed targeting criteria when it may improve performance at a lower cost per result." At the bottom, there is a "Connections" section with a dropdown "Add a connection type" and a "Save This Audience" button.

3. Select your ad placements from one of the following:

- **Automatic Placements** lets Facebook show your ads where they're likely to perform best. This method is recommended.
- **Edit Placements** lets you to choose manually where your ads are placed.

4. View the options in the drop-down menu for **Optimization for Ad Delivery** to choose how you want Facebook to deliver your ads. This allows you to select the outcome you're trying to achieve. Facebook will show ads to optimize for this outcome.

5. Choose a budget type based on the schedule.

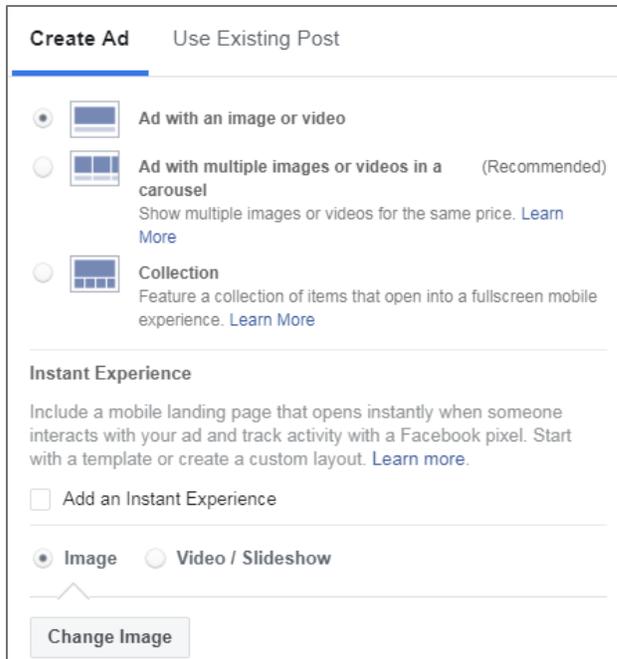
- Set a **Daily Budget** for the average amount you're willing to spend on an ad set per day.
- Set a **Lifetime Budget** for the amount you're willing to spend over the entire run-time of an ad set.

Create an Ad

Third, you'll select the creative materials and add text for your ad.

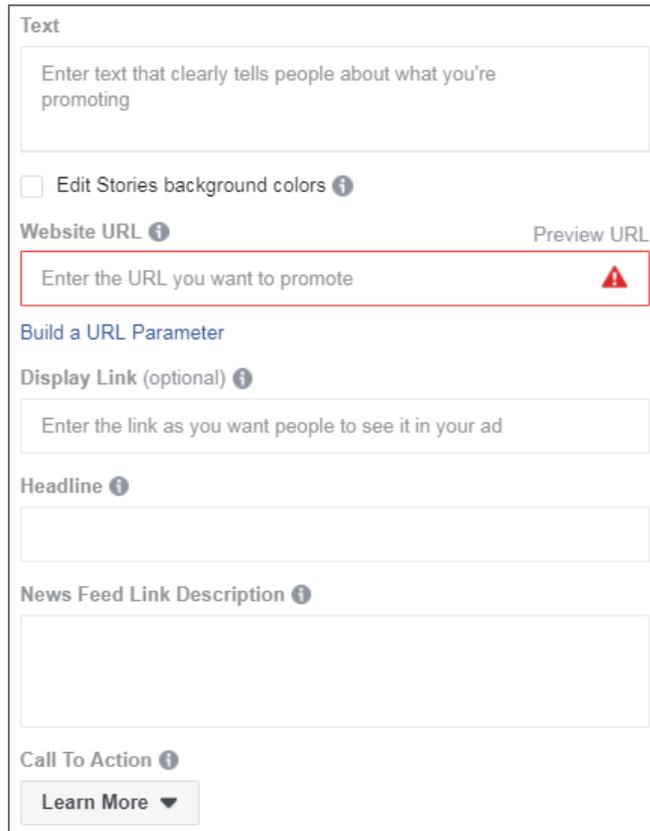
1. Select your page.
2. Select an ad format (Exhibit 11).

Exhibit 11. Ad format options.*



3. Choose the creative materials you want to use for your ad.
 - To upload materials, select **Add More Images** or **Upload Video**.
 - Select **Review Placements** to preview or edit the materials you chose across placements.
4. Add the text you'd like to display in your ad.
 - Depending on your previous selections, you may have the option to add a Call to Action button, which is recommended (Exhibit 12).

Exhibit 12. Ad content options.*



The screenshot shows the 'Text' section of a Facebook ad creation interface. It includes a text input field with the placeholder 'Enter text that clearly tells people about what you're promoting'. Below this is a checkbox for 'Edit Stories background colors'. The 'Website URL' field is highlighted with a red border and contains a warning icon, with the placeholder 'Enter the URL you want to promote'. To its right is a 'Preview URL' label. Below the URL field is a section for 'Build a URL Parameter' with a 'Display Link (optional)' field. Further down are fields for 'Headline' and 'News Feed Link Description'. At the bottom, there is a 'Call To Action' dropdown menu currently set to 'Learn More'.

5. Preview your ad and select **Confirm**.
 - The first time you place an order, you'll be asked to enter your payment information.
6. Your campaign is now live and will be published immediately (pending a review from Facebook).
 - *Learn more about [creating ads](#).*

Alternate Execution: Boost a Post

Boosted posts are ads you create from posts on your Facebook page. Boosting a post may help you get more people to react to, share, and comment on your post. You may also reach new people who are likely interested in your page but don't follow you.

To turn your page post into an ad:

1. Go to your Facebook page.
2. Find the post you want to boost.
3. Select **Boost Post** (in the bottom-right corner of your post).

4. Fill in the details about your ad. Facebook will automatically use images and text from your post, but you can choose other details:
 - *Audience*: Choose a recommended audience or create a new audience based on specific traits.
 - *Total budget*: Select a recommended budget or provide a custom budget.
 - *Duration*: Select one of the suggested time frames or provide a specific end date.
 - *Payment method*: Review your payment method.
5. When you're finished, select **Boost**.
 - *Best Practice*: Add movement to your ads to help them stand out. When you boost a post, you can use free tools that automatically enhance or animate your ad.
 - *Learn more* about [boosted posts](#).

Phase 3: Monitoring and Optimization

Monitoring and Optimization Step 1: Monitor and Respond to Ad Engagement

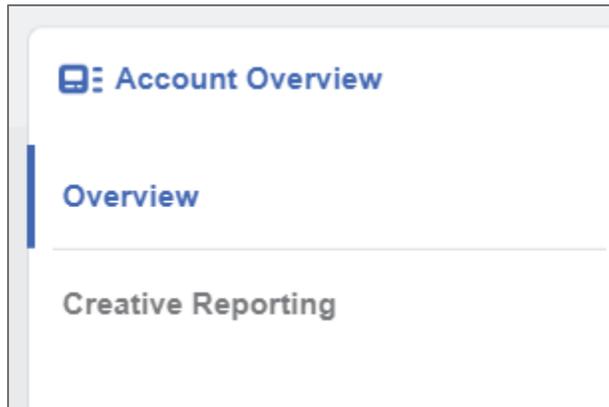
You should respond to the comments that people post on your ads. Responding consistently and frequently can increase people's perception that you are active and engaging. To see reactions, comments, and shares on an ad you created in Ads Manager,

1. Go to [Ads Manager](#);
2. At the **Ad** level, check the box next to your chosen ad, and then click **Edit** (under the ad name) to open the side pane;
3. Click above your ad preview on the right;
4. In the drop-down menu, under **See post**, select **Facebook post with comments** or **Instagram post with comments**; and
5. Facebook and Instagram will list your posts with people's reactions for you to respond as appropriate.

Monitoring and Optimization Step 2: View Your Ad's Results

After you've published your ad, you can monitor its performance and adjust your approach to optimize results. In **Account Overview** in [Ads Manager](#) (Exhibit 13), you can see how your entire ad account is performing and gain insights for future campaigns.

Exhibit 13. Account Overview tab. *



Account Overview summarizes the holistic performance of all your campaigns. Here, you can learn about the demographic information of the people viewing your campaigns. You can also use charts to analyze trends in the performance of your ads over time.

- *Learn more about [viewing ad results](#).*

Monitoring and Optimization Step 3: Analyze Your Ad’s Results and Improve Your Approach

Analyze your results

You should track your ad’s results and use data to inform ongoing work and future changes to your plan. For example, you may want to

- *Review the actions* that resulted from your ad (e.g., website visits, event sign-ups) to ensure you’re meeting goals;
- *View results by platform, device, and placement* in Ads Manager to see what delivery options achieve the best results; and
- *Compare metrics between past and new campaigns* to understand whether you’re getting better results than with previous campaigns.

You can use these insights to revise your approach, even while your ad is active, building on what is working and stopping what is not working.

- *Learn more about [viewing results by delivery option](#).*

Edit your ads

Ads Manager lets you manage and edit both active and inactive ads, giving you the power to adjust ads based on your analysis of their performance.

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To edit your ads in Ads Manager,

1. Go to [Ads Manager](#).
 2. Select the **Ads** tab.
 3. Click to check the box next to the ad you want to edit.
 4. Select **Edit**.
 5. Edit your ad in the side pane.
 6. If you adjust your ad's contents (image, video or text), it can take up to 45 minutes for the new ad to be approved and start delivering.
 7. To publish the changes, select **Publish**. To save the changes and publish later, click **Close**.
- *Learn more about [editing ads](#) in Ads Manager.*

Social Media Ad Planning Worksheet

To complete this worksheet, refer to the previous sections for definitions and descriptions about the elements required for planning social media ads. Defining these elements for your ads in advance will help you to plan and execute your ad buy.

Phase 1: Planning

Planning Step 1: Set Goals and Objectives

Establish your overarching SMART goal:

Define your online advertising objective:

Planning Step 2: Plan How Your Ads Will Run

Choose the format for your ad:

Define your target audience:

Choose your ad placements:

Planning Step 3: Configure Resources

Set up a Facebook Ads account:

Check when complete

Determine your budget:

Phase 2: Execution

Execution Step 1: Create Your Ad Components

Write your ad copy:

Develop creative materials:

Check when complete

Execution Step 2: Set Up Your Ad

Create a campaign and associated ad(s):

Check when complete

Phase 3: Monitoring and Optimization

Monitoring and Optimization Step 1: Monitor and Respond to Ad Engagement

Determine your monitoring schedule and roles: