

01 — Foundations Guide

Account setup, Business Manager, Instant Forms & the offer structure that converts • Your Pro Marketing Assistant

1. Why This Module Matters

Most roofers fail at Facebook Ads before they even create their first campaign. They skip Business Manager setup, use personal accounts, or try to drive traffic to a website they don't control. This module gives you the exact foundation so you can run ads the right way from day one — without a landing page and without hiring an agency.

2. What You Will Set Up

- Facebook Business Manager (the only correct way)
- Ad Account owned by your Business Manager
- Facebook Page (or use existing) correctly linked
- Instant Forms (Lead Forms) — the system that replaces landing pages
- The exact offer structure that converts for roofers
- Permissions so you (or your VA) can manage everything safely

3. Step-by-Step: Business Manager Setup

1. Go to business.facebook.com and create a Business Manager (or claim an existing one).
2. Add your Facebook Page as an asset.
3. Create a new Ad Account under the Business Manager (never run ads from a personal ad account long-term).
4. Add payment method to the Ad Account.
5. Assign yourself Admin access on both Page and Ad Account.

Pro Tip: Never run serious ad spend from a personal Facebook account. Business Manager protects you and makes scaling clean.

4. Instant Forms — Your Secret Weapon

You do **not** need a website or landing page for this system. Facebook Instant Forms (also called Lead Forms) collect name, phone, zip code, service interest, and timeline directly inside the Facebook app. This is faster for the homeowner and cheaper for you (no page builder, no hosting, no pixel headaches).

In the next modules you will learn the exact creative + targeting + campaign structure. In this module you only need to understand that Instant Forms are the delivery method.

5. The Exact Offer Structure That Converts

Every high-performing roofer offer follows this simple pattern:

- **Clear benefit** (save money, free inspection, restore instead of replace)
- **Risk reversal** (free, no obligation, we pay you \$500 if...)
- **Urgency or scarcity** (first 5, this week only, limited slots)
- **Low friction** (Instant Form with only 6 questions)

You will find 8 ready-to-copy Instant Form offers in the **Letter-Offer-Templates.pdf** file in the Tools library. Use those exactly until you have enough data to improve them.

6. What “Done” Looks Like

- Business Manager is created and you are Admin
- Ad Account is created under Business Manager and has a payment method
- Facebook Page is linked as an asset
- You understand Instant Forms and have looked at the 8 offer templates
- You are ready to move to Module 2 (Creative System)

Pro Tip: If anything feels confusing, message me privately on Facebook Messenger. I will walk you through it 1-on-1. There is no public forum — your questions stay private.

Next Step

Download the **01-Foundations-Checklist.pdf** and tick every box. Then move to Module 2 – Creative System.