



MARCH 2025

# TRADE ALLY SOCIAL MEDIA PLAYBOOK

QUESTIONS?

Please contact your Energy Trust Account Manager







## WELCOME TO THE **TRADE ALLY SOCIAL MEDIA PLAYBOOK!**

Social media is a powerful tool to boost your business's visibility, connect with customers and establish credibility in the community. In this playbook, we'll walk through:

- Setting up and optimizing your social media profiles
- Using pre-approved INSIDER content to simplify posting
- Best practices for creating engaging, effective content for each key channel
- Tracking performance to refine your strategy and drive results

By the end, you'll have the tools and insights to confidently use social media to grow your business and reach more customers. Let's get started!





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# SOCIAL MEDIA FUNDAMENTALS

INTRODUCTION TO SOCIAL MEDIA MARKETING

# BENEFITS OF SOCIAL MEDIA

Social media is essential for businesses, with over 3.6 billion users globally. It helps build brand awareness, increase website traffic and boost sales. Additionally, a strong social media presence allows businesses to monitor their reputation, offer customer service and gain insights into customer behavior and preferences.

**44%**

of small businesses  
use social media for  
brand awareness

**52%**

of online brand  
discovery happens in  
public social feeds

**71%**

of consumers who had a good  
social media experience with a  
brand are likely to recommend  
it to others

## WHY SOCIAL MEDIA MATTERS FOR TRADE ALLIES:

- Increase brand visibility
- Drive quality, long-term customer engagement
- Reputation management
- Reach wider audiences
- Build credibility among new audiences



# ORGANIC CONTENT VS. PAID SOCIAL CONTENT

## ORGANIC SOCIAL CONTENT

- Includes **free posts** that appear naturally in your followers' feeds
- Builds brand awareness, trust and community
- Relies on engaging content to attract followers and drive interactions

**Examples:** Behind-the-scenes posts, customer reviews, energy-saving tips, project spotlights.

## PAID SOCIAL CONTENT

- Sponsored posts that reach non-followers using a **set amount of budget**
- Boosts visibility, drives traffic and supports specific business goals
- Offers detailed analytics and audience targeting options

**Examples:** Ads for limited-time rebates, lead generation campaigns, boosted posts\* to expand reach.

### \*WHAT ARE BOOSTED POSTS?

Boosted posts are existing organic posts that you **pay to promote to a larger audience**. It's a simple way to increase visibility and engagement without having to create a separate ad.

- **Quick & easy** – Select an organic post, set a budget, and choose your target audience.
- **Increases reach** – Expand your visibility beyond your followers to attract new customers.
- **Drives engagement** – Get more likes, shares and clicks on important posts.

# FINDING YOUR AUDIENCE

Understanding your ideal customer profile is the cornerstone of any successful social strategy, as it enables you to create tailored content that resonates with your audience and drives engagement.

## Questions to Ask:

*Who are you marketing to?*

*Who do you want to market to?*

- **Demographic Information:** Age, gender, income, education, occupation.
- **Geographic Location:** Where they live (country, region, city).
- **Interests and Hobbies:** What they enjoy doing, their passions and leisure activities.
- **Behavioral Insights:** Purchase behavior, brand loyalty, product usage.
- **Psychographics:** Values, attitudes, lifestyles, and personality traits.
- **Customer Needs and Challenges:** Problems they face that your product/service can solve.
- **Social Media Habits:** Which platforms they use most, peak activity times.



# FINDING YOUR AUDIENCE

## **ANALYZE YOUR CURRENT AUDIENCE**

Examine your existing customer base and social media followers to identify common characteristics and trends. Use tools like Facebook Insights or Google Analytics to gather demographic and behavioral data.

## **CREATE CUSTOMER PERSONAS**

Develop detailed profiles of your ideal customers, including demographics, psychographics, interests and pain points. Buyer personas help you understand your audience better and tailor your content to their needs.

## **RESEARCH SIMILAR ORGANIZATIONS**

Find brands that have similar offerings. Investigate their social media presence to identify their target audience and strategies. Note any gaps or opportunities you can capitalize on to differentiate your brand and appeal to your audience.



# WHICH SOCIAL PLATFORM IS RIGHT FOR YOU?

Platform	Overview	Used for...
 <b>Facebook</b>	World's leading social networking site, with 2/3 of users visiting local business pages weekly. Your page serves as a secondary website, hosting essential business information and updates.	Business information sharing + community building
 <b>Instagram</b>	Used by 83% of consumers to discover new products or services, focusing on visual content like short-form videos and static imagery.	Brand awareness + audience engagement
 <b>LinkedIn</b>	The leading platform for professional and B2B marketing. It provides a trusted environment, ideal for service-based companies and recruitment efforts.	Building credibility + grow professional network
 <b>Google for Business</b>	Helps businesses connect with customers by enhancing visibility in search results and Google Maps, making it essential for driving local engagement and building online credibility.	Business information sharing + connect with customers

# ACCOUNT SETUP

CREATING SOCIAL MEDIA BUSINESS PROFILES



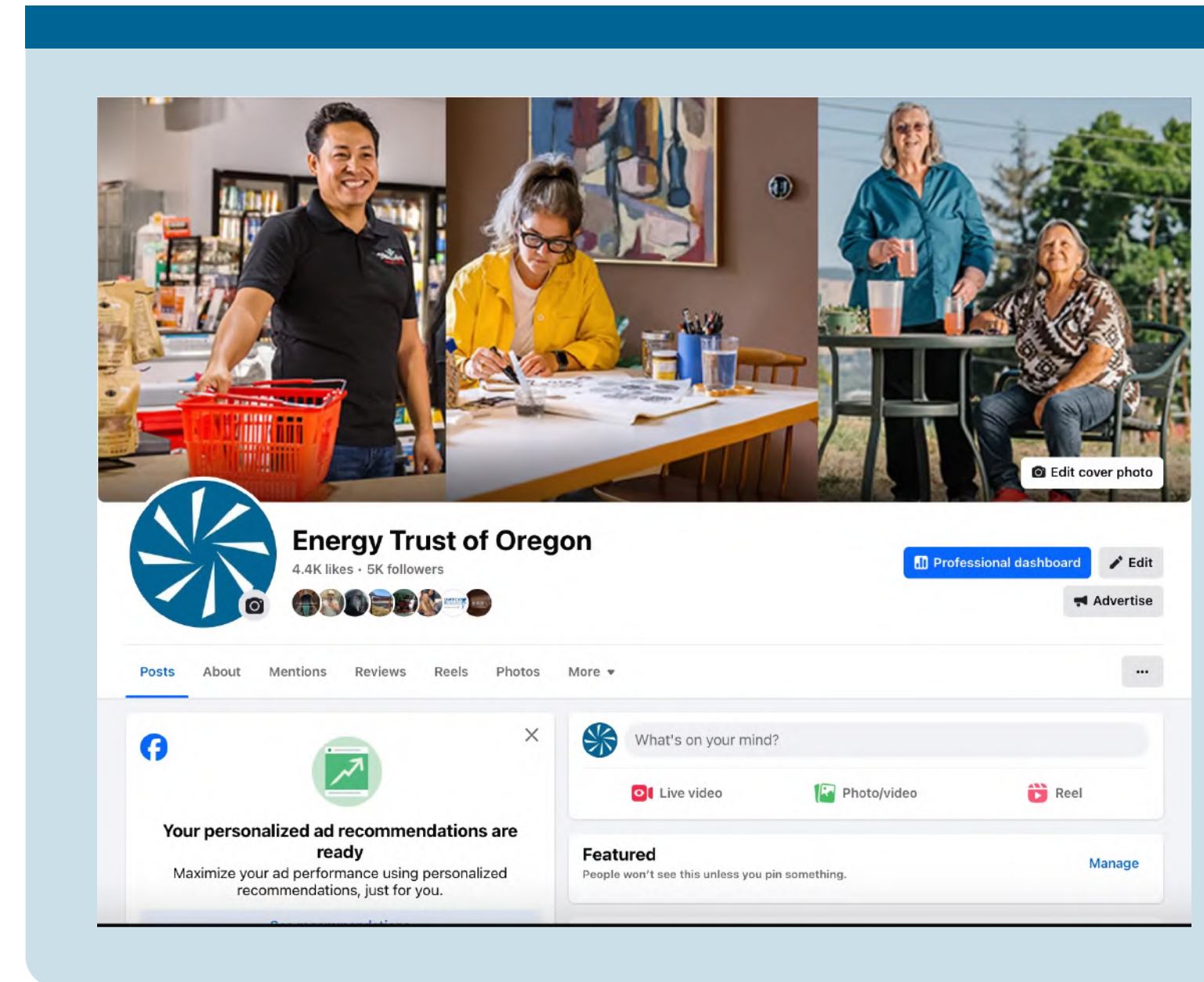


# META BUSINESS SUITE

Meta Business Suite is a free, all-in-one platform for managing your business's presence on Facebook and Instagram. It simplifies cross-platform posting, messaging and performance tracking.

## FEATURES

- **Builds Brand Presence:** Showcase your business with a professional profile, including photos, videos and company details to attract customers.
- **Engages with Customers:** Interact directly with your audience through posts, comments and Messenger, building stronger relationships.
- **Boosts Visibility:** Utilize Facebook's powerful algorithm to reach new audiences and stay connected with existing followers.
- **Advertising Options:** Launch targeted ad campaigns to promote your business to specific demographics and track their performance.
- **Analytics and Insights:** Access data on reach, engagement and audience demographics to measure success and improve strategies.



# META BUSINESS SUITE – PAID VS. ORGANIC CONTENT

## ORGANIC POSTS

Free posts that appear on your Facebook and Instagram profiles, reaching your followers and their networks through engagement.

### Best practices:

- Use high-quality photos/graphics to grab attention.
- Post consistently and at optimal times for your audience.
- Include captions with clear calls to action and relevant hashtags.
- Engage with users by responding to comments and messages.

### Examples of content:

- *Behind-the-scenes photos or videos.*
- *Customer stories or testimonials.*
- *Polls, Q&A sessions or other interactive posts.*
- *Announcements of new products or upcoming events.*

## PAID POSTS

Boost existing organic posts or create dedicated ads to reach a wider, targeted audience. Includes various ad types like image, video and carousel ads. Boosting a post means paying to promote an organic post, essentially making the post a paid ad.

### Best practices:

- Use attention-grabbing visuals and concise messaging.
- Target your audience based on interests, demographics and behavior.
- Test different ad creatives to identify what works best.
- Monitor performance and optimize based on insights.

### Examples of content:

- *Boosted posts promoting an event or offer.*
- *Video ads showcasing product benefits.*
- *Carousel ads highlighting multiple products or features.*
- *Lead ads for collecting user information directly on Meta.*



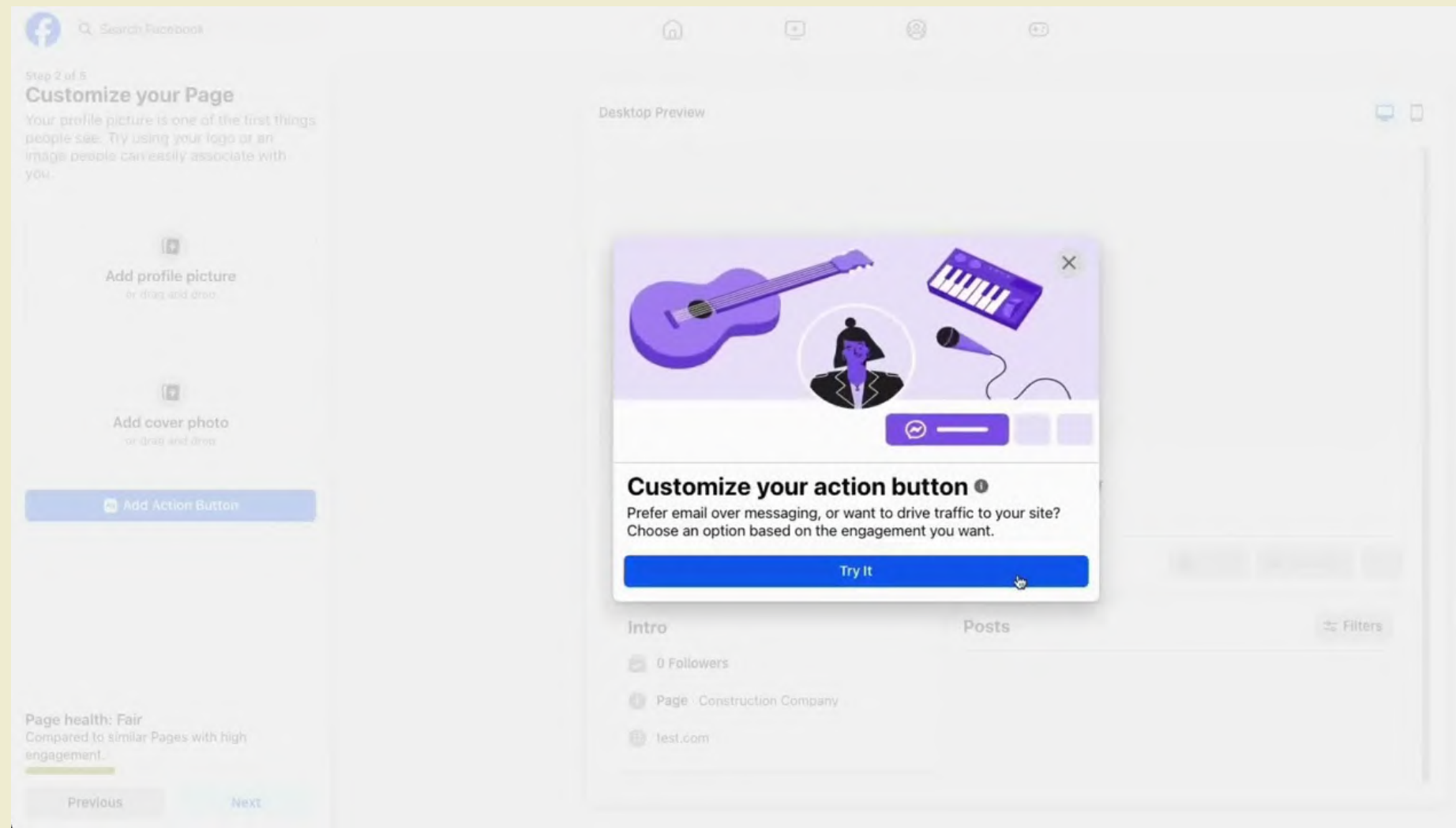
# HOW TO SET UP A FACEBOOK BUSINESS PAGE

## Video walkthrough

VIDEO LINK: <https://youtu.be/bPiF-Ct-3fg>

## Step-by-step guide

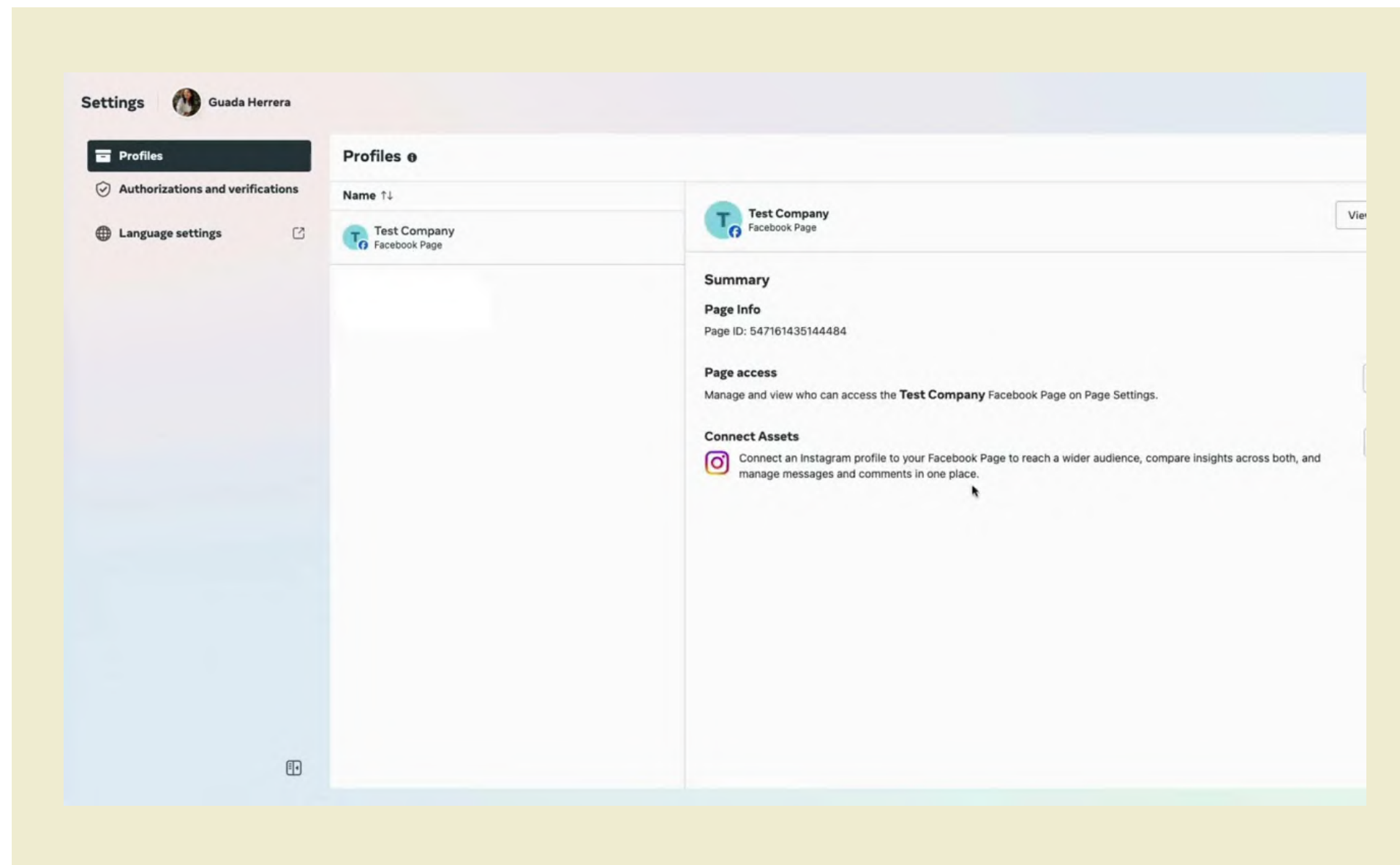
1. **Log In to Facebook:** Sign in to your personal account or create a new one.
2. **Go to Page Creation:** Click “Pages” and select “Create a New Page”.
3. **Enter Business Information:** Add your Page name, category, and business description.
4. **Customize Your Page:** Fill out contact details, operating hours and call-to-action buttons.
5. **Upload Visuals:** Add a profile picture (like your logo) and a cover photo.
6. **Optional:** Connect WhatsApp account or invite Facebook friends to follow your page.
7. **Publish and Promote:** Click “Create Page” and start posting content to engage your audience.



# HOW TO SET UP A META BUSINESS SUITE ACCOUNT

## Video Walkthrough

VIDEO LINK: [https://youtu.be/pZrCEgq\\_wLY](https://youtu.be/pZrCEgq_wLY)



## Step-by-Step Guide

1. **Access Meta Business Suite:** Visit [business.facebook.com](https://business.facebook.com) and log in with your Facebook credentials.
2. **Create or Select a Business Account:** If you don't have a business account, click "Create Account" and follow the prompts to set one up.
3. **Add Your Facebook Page:** In the Business Suite dashboard, navigate to "Settings" > "Profiles." If your business page is not linked, click "Add Assets" and select "Add a Page" to link your existing Facebook business page.
4. **Connect Your Instagram Account:** Viewing your connected Facebook business page, click "Connect Instagram". Follow the instructions to connect your Instagram Business Profile.
5. **Explore Features:** Utilize the dashboard to create and schedule posts, manage messages, view insights and run ads across your connected accounts.

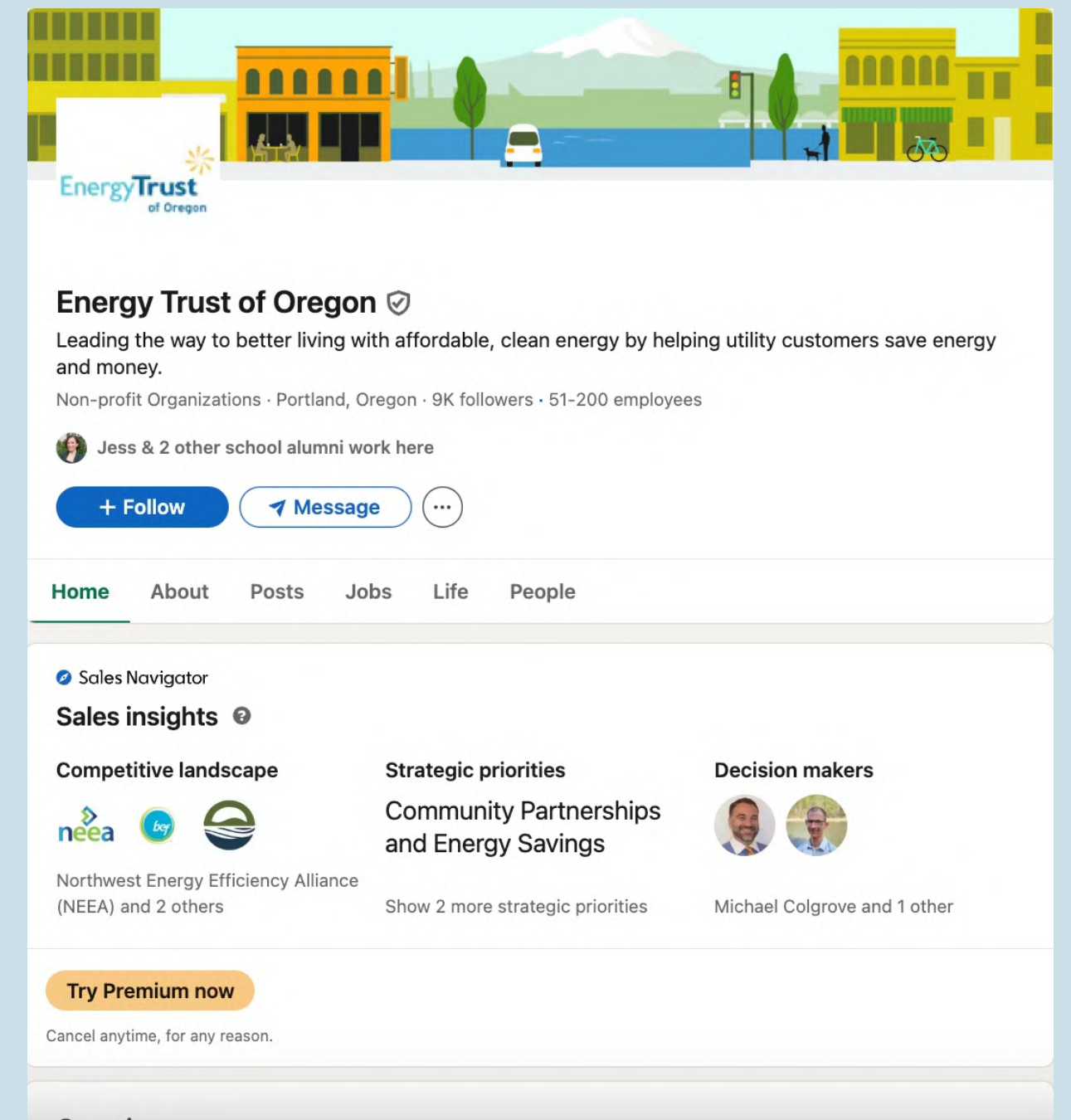


# LINKEDIN BUSINESS ACCOUNT

A LinkedIn Business Account is a professional profile for organizations to showcase their brand, share updates and engage with a professional audience. It helps businesses connect with industry professionals and grow their network.

## FEATURES

- **Builds Brand Credibility and Professional Presence:** Share company updates, thought leadership and achievements to establish authority in your industry.
- **Facilitates Networking:** Connect with potential clients, business partners and employees through direct engagement and content sharing.
- **Provides Analytics:** Track the performance of posts and audience engagement to refine your LinkedIn strategy and reach your goals effectively.



# LINKEDIN BUSINESS ACCOUNT – PAID VS. ORGANIC CONTENT

## ORGANIC POSTS

Free posts shared on your company's LinkedIn page to engage with followers and showcase your brand.

### Best practices:

- Share industry insights, company news and thought leadership content.
- Use engaging visuals like infographics, photos and videos.
- Write compelling captions with clear calls to action.
- Post consistently and encourage employees to share content to expand reach.

### Examples of content:

- *Blog articles or whitepapers on industry trends*
- *Employee spotlights or team achievements*
- *Event promotions or highlights*
- *Polls or questions to spark conversation with your audience.*

## PAID POSTS

Paid campaigns allow you to expand reach, target specific audiences and achieve measurable goals. LinkedIn offers ad formats like Sponsored Content, Text Ads and Message Ads (InMail).

### Best practices:

- Tailor your message to specific audience segments.
- Include clear, actionable CTAs like “Download,” “Learn More” or “Sign Up.”
- Use professional visuals and concise, compelling ad copy.
- Monitor performance metrics and adjust targeting or creatives as needed.

### Examples of content:

- *Sponsored posts promoting a product or service*
- *Carousel ads showcasing multiple offerings or features*
- *InMail campaigns sending personalized messages to targeted users*
- *Lead gen ads collecting user details directly on LinkedIn.*



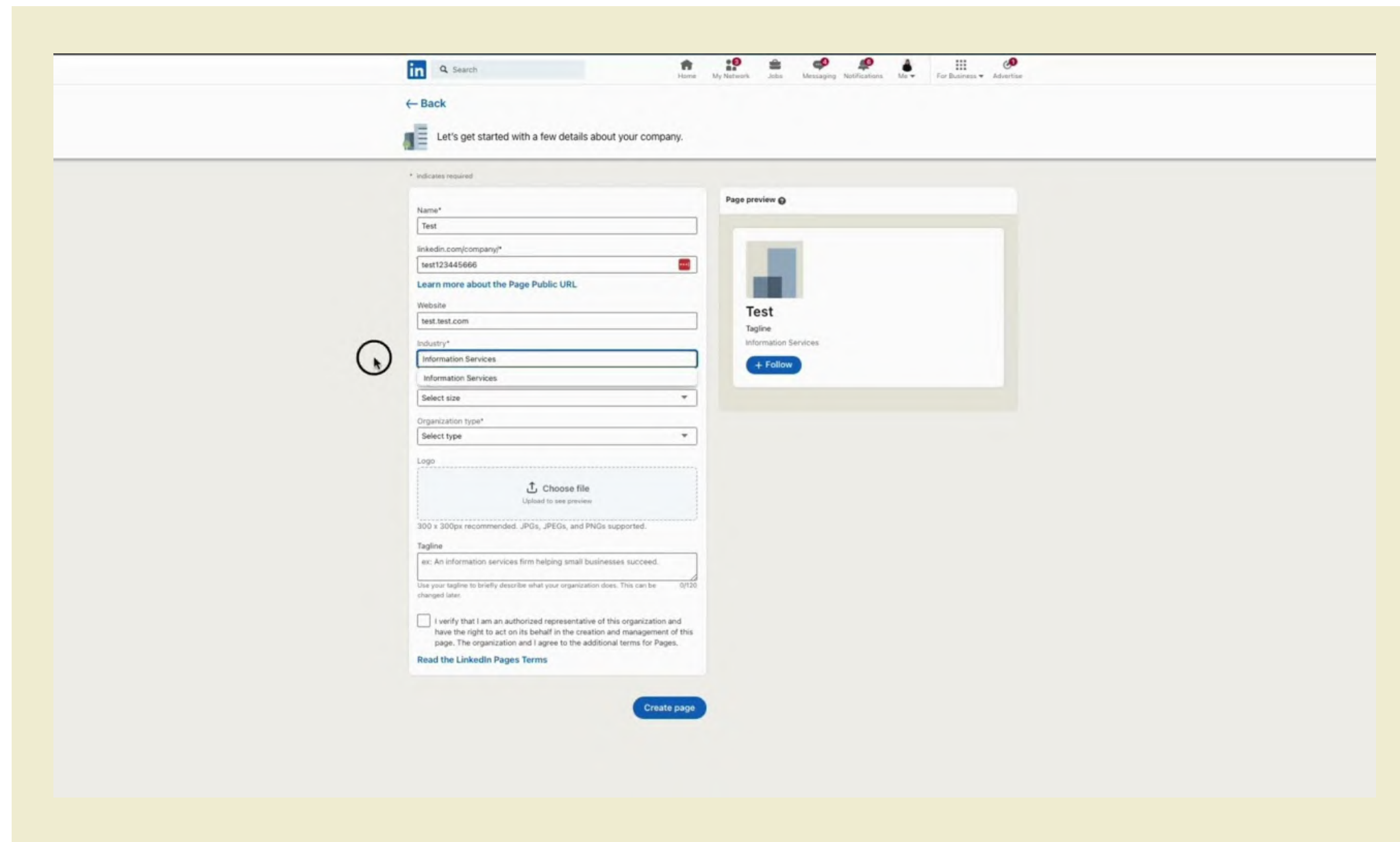
# HOW TO SET UP A LINKEDIN COMPANY PAGE

## Video Walkthrough

VIDEO LINK: <https://youtu.be/WpDEM-bZvYY>

## Step-by-Step Guide

1. **Log In or Sign Up:** Sign in to your LinkedIn account or create one if you're new.
2. **Create a Page:** Go to the LinkedIn Pages section and select "Create a Company Page."
3. **Choose Your Page Type:** Select the option that fits your business (small, medium or showcase page).
4. **Fill Out Business Details:** Add your company name, website, logo and tagline.
5. **Customize Your Page:** Complete the "About" section, add a banner image and include relevant hashtags.
6. **Publish and Share:** Click "Create Page" and start sharing updates to attract followers.



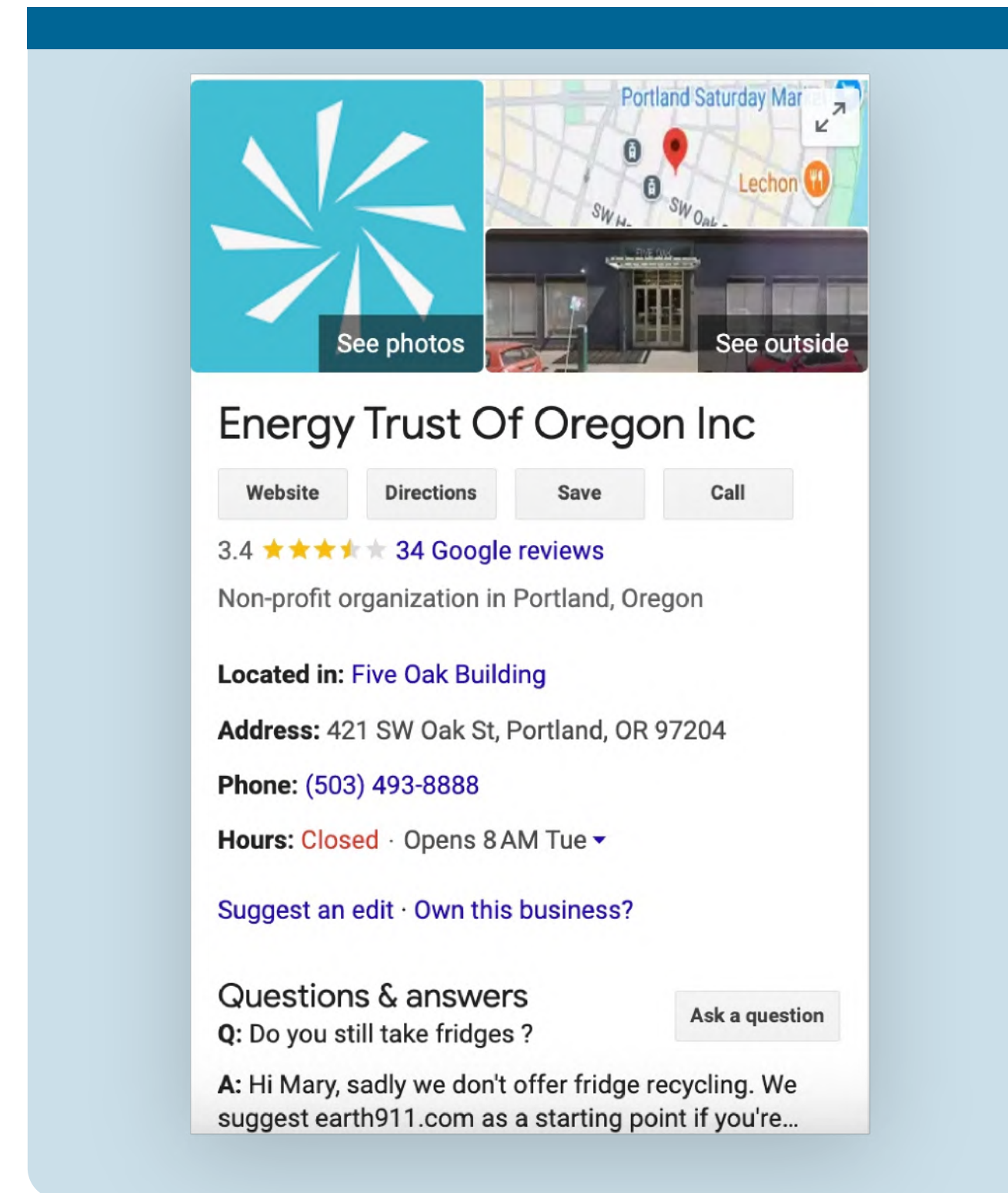
The screenshot shows the LinkedIn 'Create a Company Page' form. At the top, there's a navigation bar with the LinkedIn logo, a search bar, and links to Home, My Network, Jobs, Messaging, Notifications, and Me. Below this is a 'Back' button and a prompt: 'Let's get started with a few details about your company.' The form itself is divided into two main sections. The left section contains fields for 'Name\*' (with 'Test' entered), 'linkedin.com/company/\*' (with 'test12345666' entered), 'Website' (with 'test.test.com' entered), 'Industry\*' (with 'Information Services' selected), 'Select size' (a dropdown menu), 'Organization type\*' (a dropdown menu), 'Logo' (a 'Choose file' button with 'Upload to see preview' text), and 'Tagline' (with 'ex: An information services firm helping small businesses succeed.' entered). A checkbox at the bottom states 'I verify that I am an authorized representative of this organization and have the right to act on its behalf in the creation and management of this page. The organization and I agree to the additional terms for Pages.' Below this is a link to 'Read the LinkedIn Pages Terms'. The right section is a 'Page preview' showing a mockup of the company page with the name 'Test', tagline 'Information Services', and a '+ Follow' button. A 'Create page' button is located at the bottom right of the form.

# GOOGLE FOR BUSINESS PROFILE

A [Google Business Profile](#) is a free tool that lets businesses manage their online presence across Google Search and Maps, helping them attract and connect with local customers.

## FEATURES

- **Improves Visibility in Local Search Results:** Appear prominently when customers search for services or products near them, boosting discoverability.
- **Easy Updates to Business Information:** Keep your business hours, contact details and services current to ensure customers always have accurate information.
- **Showcases Customer Reviews:** Display and respond to reviews to build trust and credibility with potential customers.
- **Insights for Performance Tracking:** Access data on customer interactions, such as how they found your business, to optimize your profile and marketing efforts.





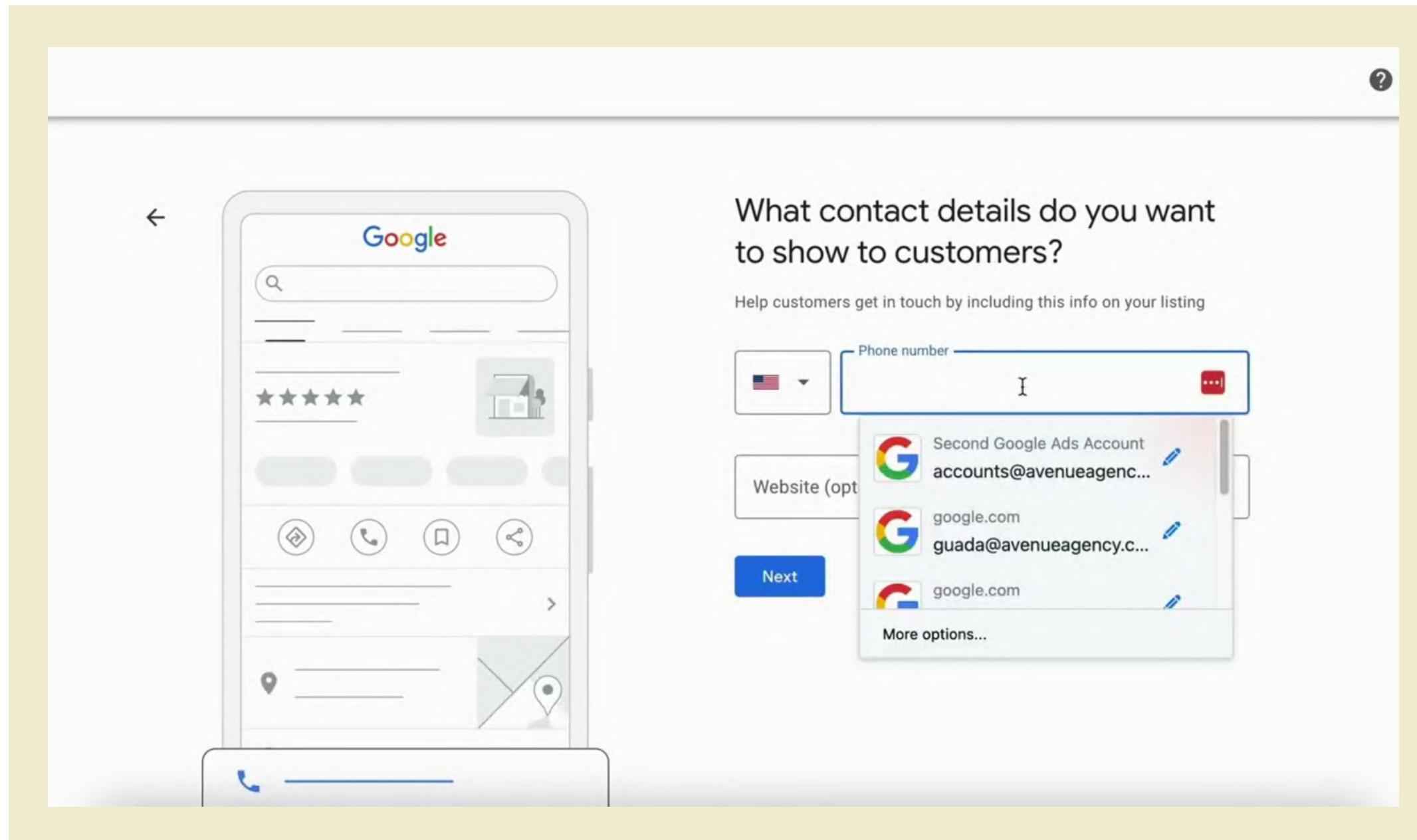
# HOW TO SET UP A GOOGLE BUSINESS PROFILE ACCOUNT

## Video Walkthrough

VIDEO LINK: <https://youtu.be/y7PeLGrjZto>

## Step-by-Step Guide

1. **Sign In to Google:** Use a Google account or create one if needed.
2. **Go to Google Business Profile:** Visit the [Google Business Profile website](#).
3. **Add Your Business:** Enter your business name, location and category.
4. **Verify Your Business:** Complete the [verification process](#) via video, phone or postcard.
5. **Complete Your Profile:** Add details like business hours, services, photos and contact information.
6. **Engage with Customers:** Start responding to reviews and updating your profile regularly.



# GOOGLE ADS

Google Ads is an online advertising platform that allows businesses to reach potential customers through search engine results, websites, YouTube and more. It provides tools to create, manage and optimize paid advertising campaigns.

## FEATURES

- **Increased Visibility:** Show your ads at the top of Google Search and across a network of websites.
- **Precise Targeting:** Target customers based on keywords, location, interests and demographics.
- **Flexible Budgets:** Control ad spend with customizable daily and campaign budgets.
- **Measurable Results:** Track performance with detailed analytics to refine your ad strategy.

Sponsored



energytrust.org  
www.energytrust.org/

### Smart thermostat incentives - Energy Trust of Oregon

Upgrade your business's thermostat at a low or even no cost with Energy Trust incentives. Lower energy bills and improve the comfort of your business with Energy Trust's help. Read News. Find A Contractor.

TEXT AD

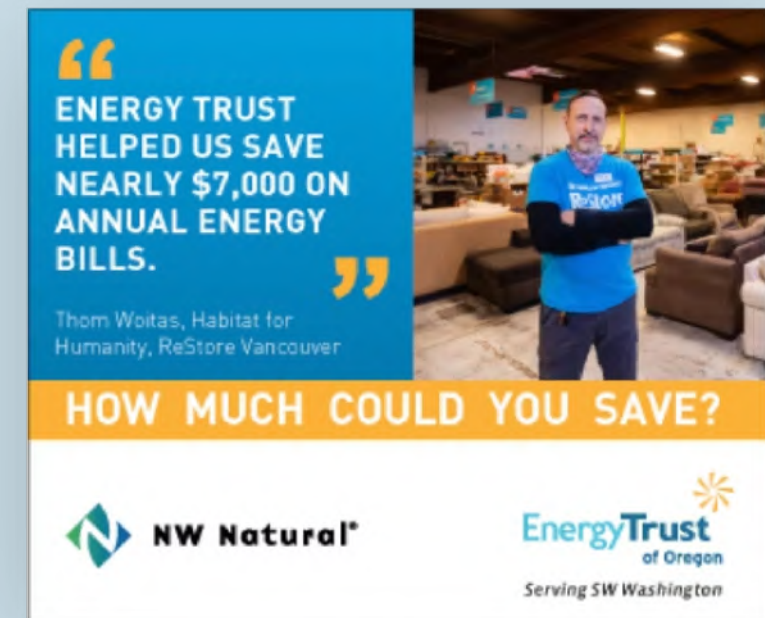


IMAGE AD



# GOOGLE ADS ACCOUNT WALKTHROUGH

## Video Walkthrough

VIDEO LINK: <https://youtu.be/4rwfG92aRck>

## Step-by-Step Guide

1. **Go to Google Ads:** Visit [ads.google.com](https://ads.google.com) and click “Start Now.”
2. **Sign In or Create an Account:** Use your Google account to log in or create a new one.
3. **Add Your Business Information:** Add your business name and website
4. **Set Your Campaign Goal:** Choose an objective like website traffic, leads or brand awareness.
5. **Create Your Campaign:** Select the campaign type (Search, Display, Video, etc.) and define your target audience.
6. **Choose Keywords:** Add relevant keywords that match what your audience is searching for.
7. **Design Your Ad:** Write compelling ad copy and upload any images or videos.
8. **Set Your bid strategy:** Enter your desired bidding strategy (e.g., Maximize Conversions or Clicks).
9. **Set Your Budget:** Enter your daily budget.
10. **Add Payment Details:** Enter your billing information to activate your account.
11. **Launch Your Campaign:** Review and publish your ad, then monitor performance via the dashboard.

The screenshot shows the Google Ads interface for creating a new campaign. The left sidebar contains a navigation menu with the following items: Search, Add business information (checked), Create your campaign (selected), Choose goal, Choose campaign, Select keywords (active), Create ads, Set bid strategy, Set budget, and Enter payment details. The main content area is titled 'Define who should see your ads'. It features a 'Keywords' section with the subtext 'Get keyword suggestions (optional)' and 'Google Ads can find keywords for you by scanning a web page or seeing what's working for similar products or services'. Below this are two input fields: 'Enter a URL to scan for keywords' (containing 'test.com') and 'Enter products or services to advertise'. A 'Get keyword suggestions' button is positioned below these fields. The 'Enter keywords' section follows, with the instruction 'Keywords are words or phrases that are used to match your ads with the terms people are searching for'. It includes a large text area with the placeholder 'Enter or paste keywords, one word or phrase per line\*'. At the bottom of the page, there is a footer with a phone icon, the text 'Need help? Call for free ad setup help at 1-855-290-0343, 9am to 9pm ET, Mon - Fri.', and a link to 'Help articles'.

# GOOGLE – PAID VS. ORGANIC CONTENT

## ORGANIC POSTS (GOOGLE BUSINESS PROFILE)

Free content shared via your Google Business Profile to engage local audiences and increase visibility in search and Maps.

### Best Practices:

- Keep business details like hours, location and contact info up-to-date.
- Regularly post updates, offers or events to stay relevant.
- Add high-quality photos and videos showcasing your business or products.
- Encourage and respond to customer reviews promptly to build trust.

### Examples of Content:

- *Posts promoting seasonal sales or new product launches*
- *Event announcements like grand openings or webinars*
- *Customer testimonials or success stories in the review section*
- *High-quality photos of your storefront, team or projects.*

## PAID CONTENT (GOOGLE ADS)

Google Ads enables businesses to create promoted content (such as local search ads, promoted pins on Maps and dynamic search ads) to increase visibility and drive traffic.

### Best Practices:

- Use clear, localized ad copy to capture attention.
- Leverage location targeting to focus on nearby customers.
- Include compelling calls to action like “Call Now,” “Visit Today” or “Learn More.”
- Regularly analyze ad performance and optimize bids and targeting to maximize ROI.

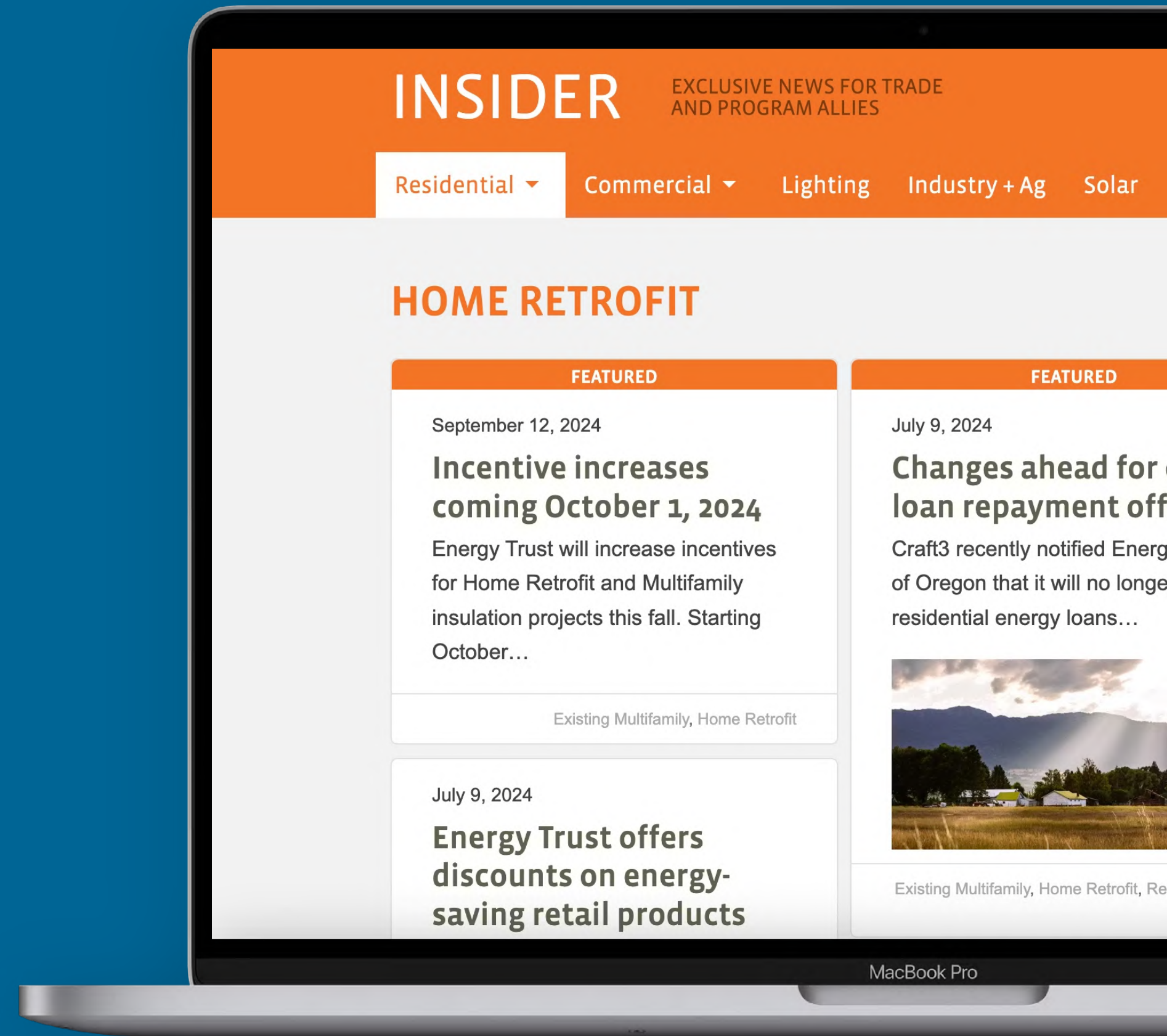
### Examples of Content:

- *Promoted pins on Google Maps highlighting your location*
- *Local search ads appearing above organic results for targeted keywords*
- *Dynamic ads showcasing specific products or services tied to searches.*



# USING APPROVED CONTENT FROM INSIDER

STREAMLINED CONTENT CREATION



# INSIDER PLATFORM

Energy Trust's trade ally pages are now combined with INSIDER. This is where all pre-approved content (creative assets and caption copy) will be housed for trade ally contractors to download and use across their marketing projects.

The INSIDER platform also includes:

- Training + Forums
- Event Calendar
- Direct Deposit Enrollment
- Fact Sheets
- Industry Articles

## ***NOTE***

Any posts referencing Energy Trust or its logo must be taken from the pre-approved content available on INSIDER.

Trade allies are **prohibited from altering pre-approved content**, unless otherwise stated.

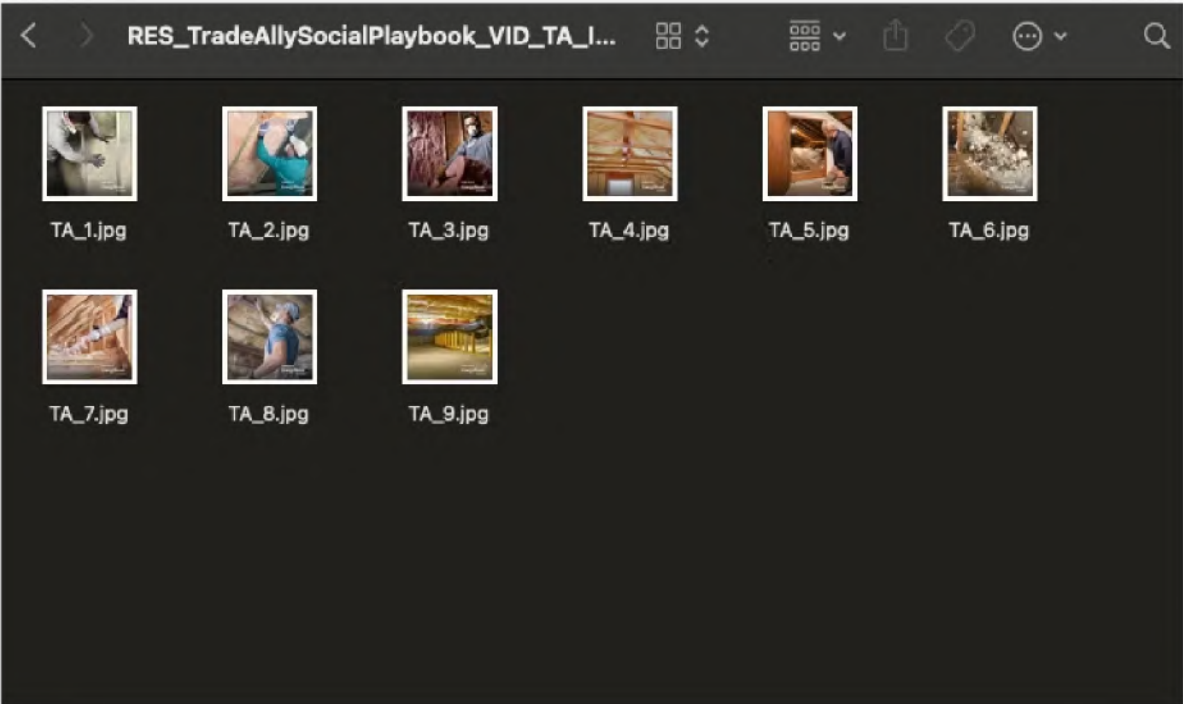
View the INSIDER homepage here: <https://insider.energytrust.org/>



# CONTENT AVAILABLE FOR DOWNLOAD ON INSIDER

NOTE: FILE DOWNLOADS WILL SHOW UP AS A ZIP FOLDER CONTAINING BOTH IMAGE FILES AND CAPTION FILES

## Image Files



PREVIEW OF IMAGE FILES ON DESKTOP (MAC)



PREVIEW OF PUBLISHED CONTENT

## Caption Copy File

Oregon		
V.1	Primary text (125 char before cutoff)	Did you know efficient insulation can help keep your home comfortable all year long? Get cash back on new insulation upgrades.
	Headline (40 char max, appears on FB ads only)	Stay Comfortable for Less
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.2	Primary text (125 char before cutoff)	We can help you save up to 50% on insulation upgrades with incentives from Energy Trust of Oregon.
	Headline (40 char max, appears on FB ads only)	Upgrade Your Insulation and Save
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.3	Primary text (125 char before cutoff)	Upgrading your insulation has many benefits including lower bills, higher energy savings and reduced noise.
	Headline (40 char max, appears on FB ads only)	Cash Back on New Insulation Upgrades
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.4	Primarv text (125 char	Bring year-round comfort and savings to your home with

PREVIEW OF CAPTION COPY FILES ON DESKTOP (WORD DOC)

### NOTE

When downloading files, double-check that you are choosing the correct marketing campaign for your trade ally region, either **OREGON OR SOUTHWEST WASHINGTON**.

# HOW TO CHOOSE THE RIGHT CAPTION COPY

Oregon		
V.1	Primary text (125 char before cutoff)	Did you know efficient insulation can help keep your home comfortable all year long? Get cash back on new insulation upgrades.
	Headline (40 char max, appears on FB ads only)	Stay Comfortable for Less
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.2	Primary text (125 char before cutoff)	We can help you save up to 50% on insulation upgrades with incentives from Energy Trust of Oregon.
	Headline (40 char max, appears on FB ads only)	Upgrade Your Insulation and Save
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.3	Primary text (125 char before cutoff)	Upgrading your insulation has many benefits including lower bills, higher energy savings and reduced noise.
	Headline (40 char max, appears on FB ads only)	Cash Back on New Insulation Upgrades
	Link	<a href="http://www.hotandcoldhvac.com">www.hotandcoldhvac.com</a>
	Description (30 char max, optional)	
	CTA (preset options)	Contact Us, Get Offer, Get Quote, Install Now
V.4	Primary text (125 char	Bring year-round comfort and savings to your home with

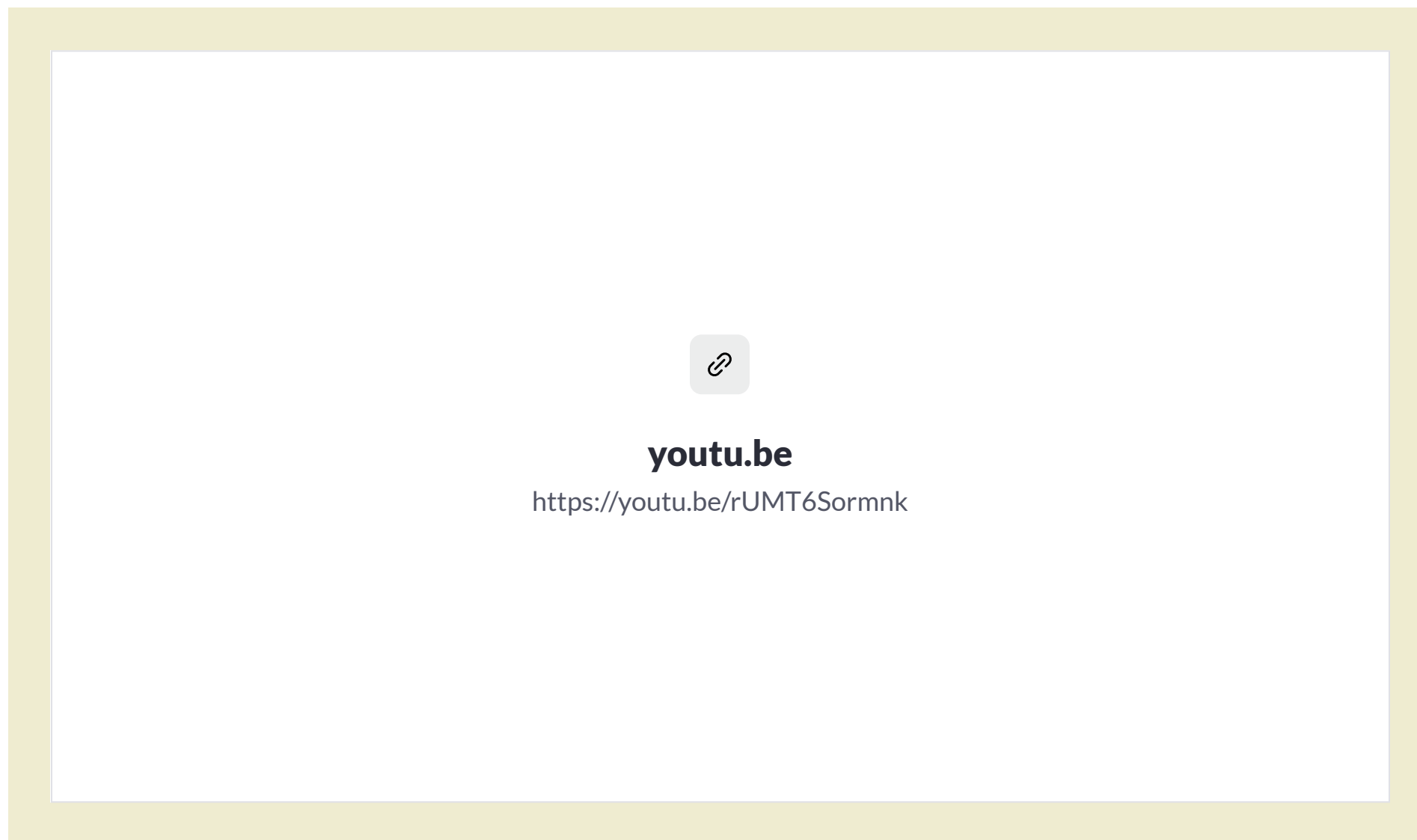
Not all ad copy is created equal—choosing the right option depends on your audience, goals and platform. Here’s a simple way to decide:

- **Know Your Goal** – Is your goal to get more website clicks, increase awareness or generate leads? Choose copy that aligns with your objective.
- **Match the Tone** – Keep your messaging consistent with your brand voice and the platform’s style (e.g., professional for LinkedIn, conversational for Facebook).
- **Test & Adjust** – Try different options and track what works best!

# HOW TO FIND MARKETING CONTENT ON INSIDER

## Video Walkthrough

VIDEO LINK: <https://youtu.be/rUMT6Sormnk>



## Step-by-Step Guide

1. Go to the [Home Retrofit Marketing Resource Page](#).
2. Click on the “Marketing Resources” link in the second paragraph of the introductory text, OR click the “Marketing Resources” tab in the middle of the screen.
3. Read through the 3 Easy Steps description prior to downloading your content.
4. Choose the correct campaign.
5. Download the zip files by clicking on the linked campaign name.  
**Note: Make sure that you are choosing the correct Trade Ally region for *Oregon* or *Southwest Washington*.**
6. Open the zip file on your computer. To open a zip file, double click on the folder icon to unzip the file.\* Once unzipped, there should be two files available for viewing (the post copy .docx file and an image file folder).
7. All images and the post copy document are now downloaded onto your computer, ready for posting!

\*Another way to unzip a file is to right-click on the zip file and click “Extract all”



# SOCIAL MEDIA BEST PRACTICES

TIPS & TRICKS

# SCALABLE BUSINESS STRATEGIES FOR DIFFERENT BUSINESS SIZES

## SMALL BUSINESSES

**Challenges:** Limited resources, time and staff for social media management.

### STRATEGIES

**Leverage Local Engagement:** Tag local partners and organizations to boost visibility.

**Encourage Testimonials:** Share quick customer stories about energy-efficient upgrades using graphics or short videos.

**Post on High-Impact Platforms:** Recommend focusing on platforms like Instagram and Facebook, where small businesses often interact with customers.

## MEDIUM BUSINESSES

**Challenges:** Balancing broader reach with deeper customer engagement.

### STRATEGIES

**Run Targeted Campaigns:** Create geo-targeted ads for promotions such as free energy assessments or rebates.

**Engage Through Educational Series:** Recommend sharing weekly posts or stories highlighting industry-specific energy-saving tips across key social media channels.

**Polls & Surveys:** Use interactive features like Instagram Stories or LinkedIn polls to engage followers and gather feedback.

## LARGE BUSINESSES

**Challenges:** Managing reputation, broader campaigns and employee engagement.

### STRATEGIES

**Collaborate on Sponsored Content:** Co-create and promote sponsored content or campaigns with partners and/or clients.

**Highlight Industry Leadership:** Promote any milestones, awards and certifications through tailored posts.

**Drive Employee Advocacy:** Create guidelines for employees to share company achievements on their personal profiles, especially on LinkedIn.

# COMMUNITY MANAGEMENT

Community management is about building relationships by engaging in two-way conversations with your audience on social media. It's the key to connecting authentically with followers and potential followers by responding to their comments, messages and interactions regularly. Community management best practices include:

## RESPOND TO ALL COMMENTS AND DIRECT MESSAGES

Leave thoughtful comments on your followers' posts to show them that their connection to your brand is a two-way relationship.

## ENGAGE WITH TAGGED CONTENT

Acknowledge your customer loyalty by commenting and/or reposting content that users have tagged your brand in (with their permission, of course!)

## FOLLOW INDUSTRY HASHTAGS AND ENGAGE WITH CONTENT

Investigate your competitors' social media presence to identify their target audience and strategies. Note any gaps or opportunities you can capitalize on to differentiate your brand and appeal to your audience.

## ASK AND LISTEN UP

Once a relationship is established, ask your followers for invaluable feedback. What kind of content do they want to see from you?



# RECOMMENDED POSTING FREQUENCY

## FACEBOOK

**Frequency:** 3–5 times per week

**Why:** Facebook’s algorithm favors consistent and high-quality content without overwhelming your audience. Posting multiple times a week keeps your business top-of-mind without being spammy.

**Content Suggestions:** Community updates, promotions, educational posts, events and behind-the-scenes content.

## INSTAGRAM

**Frequency:** 4–7 times per week (including posts, Stories and Reels)

**Why:** Instagram is highly visual, and frequent posting helps maintain visibility in both the feed and Stories. Regular content increases engagement and reinforces your presence.

**Content Suggestions:** Reels, carousel posts, Stories, product highlights, testimonials and event coverage.

## LINKEDIN

**Frequency:** 2–3 times per week

**Why:** LinkedIn values quality over quantity, focusing on professional, informative and thought-leadership content. Too-frequent posting may reduce engagement.

**Content Suggestions:** Case studies, industry insights, company milestones, employee highlights and articles.

## GOOGLE FOR BUSINESS

**Frequency:** 1–2 times per week

**Why:** Frequent updates ensure your business remains visible in local search results and relevant to potential customers. Frequent posts also improve SEO and engagement.

**Content Suggestions:** Announcements, promotions, new services, photos and customer reviews.

# SOCIAL TOOLS

Social media scheduling platforms help small businesses save time and stay organized by allowing them to plan, schedule and publish content across multiple channels in one place. A scheduling platform can be used in tandem with the INSIDER content calendar for streamlined social planning. These tools let you:

- **Schedule Posts in Advance:** Plan content for the week or month so you don't have to post in real-time.
- **Manage Multiple Platforms:** Post to Facebook, Instagram, LinkedIn and more from one dashboard.
- **Visualize Instagram Feeds:** Some platforms, like Buffer, include grid planning tools to help create a visually appealing Instagram feed.
- **Track Performance:** Many tools provide analytics to see which posts are performing best so you can adjust your strategy.

## RECOMMENDED SCHEDULING TOOLS



# PERFORMANCE TRACKING & GOALS

*HOW TO MEASURE SUCCESS*



# WHY TRACKING PERFORMANCE MATTERS

Monitoring performance and understanding your **key performance indicators (KPIs)** are essential to improving your social media strategy over time. They help you:

## IDENTIFY WHAT WORKS

By tracking metrics like engagement and follower growth, you can focus on the types of posts and strategies that **resonate most with your audience**.

## MEASURE GOAL PROGRESS

Whether it's increasing leads or building brand awareness, tracking performance helps you **set realistic goals** and **monitor your progress** over time.

## MAKE DATA-DRIVEN DECISIONS

Instead of guessing, you'll have the insights you need to confidently **invest in activities that contribute to business growth**.

# WHAT TO TRACK

Tracking the right metrics is essential for understanding the effectiveness of your social media strategy. Here are the key foundational metrics trade allies should monitor:

Metric	Why It Matters	How To Track
Follower Growth	Shows audience expansion and indicates if content is attracting new followers.	Monitor weekly or monthly changes in follower count.
Post Engagement (Likes, Comments, Shares)	Reveals audience connection and increased reach through algorithms.	Track total interactions and the tone or relevance of feedback.
CTR (Click-Through Rate)	Measures how effectively your content drives clicks to your website or landing pages, indicating interest.	Divide the number of clicks by the total impressions and express as a percentage. $(\text{total clicks} / \text{total impressions}) * 100 = \text{CTR}$
Customer Inquiries	Signals potential leads or business opportunities.	Log inquiries coming from social channels and note conversions to actions.

# HOW TO SET YOUR GOALS

## USE THE S.M.A.R.T. FRAMEWORK

Define your goals with Specific, Measurable, Achievable, Relevant and Timely criteria. For example, aim for “Increase followers by 10% within three months.”

## BREAK LARGE GOALS INTO SMALLER MILESTONES

Split bigger goals into smaller, actionable steps. Instead of aiming for 30% growth per year, set quarterly goals (e.g., 7–8% every three months).

## FOCUS AND ADJUST

Concentrate on one or two key metrics to stay focused, and regularly adjust based on results to refine your progress.



# BUSINESS DEVELOPMENT FUND

The [business development fund](#) supports Home Retrofit trade allies by **providing reimbursements for essential business expenses**, including marketing projects, training programs and personal protective equipment (PPE), to help grow their businesses and enhance their capabilities.

## Eligibility

- The business development fund is available to home retrofit trade ally contractors.
- **Pre-approval is mandatory for all reimbursements.**
- Funds are distributed on a first-come, first-served basis.

For questions, please contact the Trade Ally team at [homesfund@energytrust.org](mailto:homesfund@energytrust.org) or call 1.866.365.3526.

## Reimbursement Overview

- Standard trade allies: up to \$3,000 annually
- Minority, women, veteran-owned and rural trade allies: up to \$4,000 annually
- Covers 100% of approved expenses within the annual limit
- Minimum reimbursement amounts for marketing projects and training sessions is \$75

## Application Process:

- ① **Request pre-approval** by emailing completed [Residential BDF pre-approval application](#) and draft versions of your marketing piece or training/event description to [homesfund@energytrust.org](mailto:homesfund@energytrust.org).
- ② **Produce your marketing materials or attend your training.**
- ③ After completion, **submit invoices within 15 days** for reimbursement.

# SUMMARY & GLOSSARY

KEY MARKETING TERMS

# KEY TAKEAWAYS

## THE POWER OF SOCIAL MEDIA

- Enhances visibility and credibility.
- Builds trust and long-term engagement with customers.
- Expands reach to new audiences and boosts reputation.

## GETTING SET UP FOR SUCCESS

- Ensure profiles are complete and professional on Facebook, Instagram, LinkedIn, and Google Business.
- Use pre-approved content from INSIDER for easy, effective posting.
- Follow best practices for organic and paid content to maximize impact.

## OPTIMIZING PERFORMANCE

- Measure engagement, follower growth, and website traffic.
- Use SMART goals to track progress and adjust strategies.
- Leverage social media analytics tools to refine campaigns over time.

### *Keep in Mind*

Stay active, experiment and engage with your audience—strong social media presence leads to stronger business growth!



# SETUP STEPS BY CHANNEL

## FACEBOOK BUSINESS PAGE

1. **Log In to Facebook:** Sign in to your personal account or create a new one.
2. **Go to Page Creation:** Click “Pages” and select “Create a New Page.”
3. **Enter Business Information:** Add your Page name, category and business description.
4. **Customize Your Page:** Fill out contact details, operating hours and call-to-action buttons.
5. **Upload Visuals:** Add a profile picture (like your logo) and a cover photo.
6. **Optional:** Connect WhatsApp account or invite Facebook friends to follow your page.
7. **Publish and Promote:** Click “Create Page” and start posting content to engage your audience.

**Video Link:** <https://youtu.be/bPiF-Ct-3fg>

## META BUSINESS SUITE

1. **Access Meta Business Suite:** Visit [business.facebook.com](https://business.facebook.com) and log in with your Facebook credentials.
2. **Create or Select a Business Account:** If you don’t have a business account, click “Create Account” and follow the prompts to set one up.
3. **Add Your Facebook Page:** In the Business Suite dashboard, navigate to “Settings > Profiles.” If your business page is not linked, click “Add Assets” and select “Add a Page” to link your existing Facebook business page.
4. **Connect Your Instagram Account:** Viewing your connected Facebook business page, click “Connect Instagram.” Follow the instructions to connect your Instagram Business Profile.
5. **Explore Features:** Utilize the dashboard to create and schedule posts, manage messages, view insights and run ads across your connected accounts.

**Video Link:** [https://youtu.be/pZrCEgg\\_wLY](https://youtu.be/pZrCEgg_wLY)

## LINKEDIN COMPANY PAGE

1. **Log In or Sign Up:** Sign in to your LinkedIn account or create one if you’re new.
2. **Create a Page:** Go to the LinkedIn Pages section and select “Create a Company Page.”
3. **Choose Your Page Type:** Select the option that fits your business (small, medium or showcase page.)
4. **Fill Out Business Details:** Add your company name, website, logo and tagline.
5. **Customize Your Page:** Complete the “About” section, add a banner image and include relevant hashtags.
6. **Publish and Share:** Click “Create Page” and start sharing updates to attract followers.

**Video Link:** <https://youtu.be/WpDEM-bZvYY>

# SETUP STEPS BY CHANNEL

## GOOGLE FOR BUSINESS PROFILE

1. **Sign In to Google:** Use a Google account or create one if needed.
2. **Go to Google Business Profile:** Visit the [Google Business Profile website](#).
3. **Add Your Business:** Enter your business name, location and category.
4. **Verify Your Business:** Complete the [verification process](#) via video, phone or postcard.
5. **Complete Your Profile:** Add details like business hours, services, photos and contact information.
6. **Engage with Customers:** Start responding to reviews and updating your profile regularly.

**Video Link:** <https://youtu.be/y7PeLGrjZto>

## GOOGLE ADS

1. **Go to Google Ads:** Visit [ads.google.com](https://ads.google.com) and click “Start Now.”
2. **Sign In or Create an Account:** Use your Google account to log in or create a new one.
3. **Add Your Business Information:** Add your business name and website
4. **Set Your Campaign Goal:** Choose an objective like website traffic, leads or brand awareness.
5. **Create Your Campaign:** Select the campaign type (Search, Display, Video, etc.) and define your target audience.
6. **Choose Keywords:** Add relevant keywords that match what your audience is searching for.
7. **Design Your Ad:** Write compelling ad copy and upload any images or videos.
8. **Set Your Bid Strategy:** Enter your desired bidding strategy (e.g., maximize conversions or clicks).
9. **Set Your Budget:** Enter your daily budget.
10. **Add Payment Details:** Enter your billing information to activate your account.
11. **Launch Your Campaign:** Review and publish your ad, then monitor performance via the dashboard.

**Video Link:** <https://youtu.be/4rwfG92aRck>

## DOWNLOAD INSIDER CONTENT

1. Go to the [Home Retrofit Marketing Resource Page](#).
2. Click on the “Marketing Resources” link in the second paragraph of the introductory text, OR click the “Marketing Resources” tab in the middle of the screen.
3. Read through the 3-Easy Steps description prior to downloading your content.
4. Download the zip files by clicking on the linked campaign name. **Note: Make sure that you are choosing the correct Trade Ally region of Oregon or Southwest Washington.**
5. Open the zip file on your computer. To open a zip file, double click on the folder icon to unzip the file. Once unzipped, there should be two files available for viewing (the post copy .docx file and an image file folder).
6. All images and the post copy document are now downloaded onto your computer, ready for posting!

**Video Link:** <https://youtu.be/rUMT6Sormnk>

**INSIDER Platform Link:**

<https://insider.energytrust.org/programs/home-retrofit/business-development-fund/#marketing-resources>

# ORGANIC & PAID SOCIAL MEDIA TERMS

- **Impressions** = The number of times your post or ad was seen
- **Reach** = The number of unique users who saw your post or ad
- **Link Clicks** = The number of clicks on links within a post or ad
- **CTR** = The percentage of people who saw your ad and performed a click
- **View Rate** = Views/impressions \* 100
- **KPI** = Key Performance Indicator (aka our goals)
- **ROAS** = Confirmed return on ad spend (this metric is a conservative estimate as Facebook is unable to track all user data due to Apple's iOS 14 update)

## Defining Metrics by Channel

### Facebook + Instagram

- **Engagements:** The number of times someone took action on your posts
  - **FB:** clicks, shares, likes, reactions, comments, saves
  - **IG:** likes, comments, saves
    - **Engagement Rate:** Total engagements/followers \* 100
- Industry Engagement Benchmarks
  - **FB:** 0.10%
  - **IG:** 1.22%



# GOOGLE & PAID SOCIAL ADVERTISING TERMS

- **CPA** = Cost per acquisition, total cost divided by number of conversions
- **CPC** = Cost per click, the amount spent on each ad click
- **CTR** = Click-through rate, the percentage of people who saw your ad and performed a click
- **Conversion** = A valuable action taken, either on site or directly from an ad
- **Conversion Rate** = The percentage of interactions that result in a conversion
- **Impressions** = The number of times an ad was displayed
- **ROAS** = Return on advertising spend



**THANK YOU!**