Kind of like how Dorothy had to follow the yellow brick road, The SBZ Team wants you to use this guide as a roadmap through your Instagram journey. There is no ‘behind’ with us, no one member is coming with the same level of experience or the same struggle. There is so much to learn on Instagram—seriously. That is why we suggest following this roadmap.

**PHASE 1: SET THE STAGE**

In this phase, we want you to focus on being open to Instagram as a business tool, setting your account up strategically, and declaring your plan.

- **GET INTO THE INSTAGRAM MINDSET,** learn from our coach, AJ in PRO Video 1.
- **SET UP YOUR ACCOUNT SETTINGS AND BIO** effectively with your Pre-Pro checklist and Video 2 of Ready Set gram. *If you would like your bio reviewed, ping us in Slack!*

**DECLARE:** I am going to sell ________________________________

______________________________

on Instagram.

- **DETERMINE S.M.A.R.T. GOALS** for PRO on Instagram.

S.M.A.R.T. goals are Specific, Measureable, Attainable, Relevant and Time-bound. For example: I am going to post 1 IGTV a week for the next 6 weeks.

- I will post on Instagram Stories, at least 3 clips long for 5 days a week during the PRO program.
- I will always add at least 5 hashtags to a Feed post.
- I will use a CTA directing followers to my bio at least 1x per week in the feed and 1x per week in stories.
- I will promote my first Instagram ad by the end of the program.
Remember, your goals for the program are not the same as anyone else’s. It just depends on where you are in your Instagram journey.

ESTABLISH YOUR CONTENT BUCKETS on your Content Calendar document, located in your folder. Determine approximately 5 buckets to start. Head back to Ready Set Gram Video 3 to become familiar with the topic if you are not already. If you are looking for even more examples of content plan buckets, PRO Lesson 3 explores alternative options for you to consider.

Using buckets is a way to help you stay focused on producing content that supports your goals and that serves your followers well. Buckets can be categories of your business (like one for each offering) or can be types of posts.

**EXAMPLE BUCKETS INCLUDE:**

- Behind the scenes
- Education
- Testimonials
- Product shots or information
- Personality
- User-generated content
- News/media features or press
- Entertainment

When writing content, remember to put yourself in the viewer’s shoes. I want you to consider “what is in it for them”. Why does someone want to read this post or continue to follow you? What value do you bring them? Does someone who is viewing your profile understand what you are selling?

Put your content buckets on your content calendar document in your Google Drive folder.
**PHASE 2: DEFINE YOUR HIGH LEVEL STRATEGY**

Now that the preparation and research are done, it is time to dig deeper and begin defining your Instagram strategy and setting up the groundwork for sustainable success.

- **DEFINE YOUR HASHTAG STRATEGY.** We suggest creating a few sets of hashtags, observing the performance, and adjusting accordingly. Video 4 of Ready Set Gram can get you started. Looking for feedback on your hashtags? Tag us in slack in the #hashtag-chat channel and let’s work on it together!

- **COMPLETE THE PROMOTIONAL CALENDAR TAB** on the Content Calendar for the upcoming 3 months.

- **DEFINE YOUR “GSD” TIME** and block it on weekly on the schedule...That’s right, it’s time to get sh*t done! We have found time blocking the most effective way to get all the things done while still staying sane. Here are a few appointments we suggest making with yourself. Some of these tasks can be done in the same sitting if that works for you, but this is how Sue does it, stays active in all neighborhoods and batch creates. *If you have any questions about how this organizational plan should apply to your business—Tag us in Slack!*

  - Time to complete your promotional calendar. We suggest promotions organized and declared quarterly. The first tab on your Content Calendar Google document has a space to list promotions. This only applies if you are going to be selling via live promotion in your account.
  - Time to define your posting schedule for the week.
  - Time to create graphic content for feed or stories, or to instruct a graphic designer if necessary.
  - Time to pre-record, write, descriptions and schedule posts.
  - Time daily to check the account and engage.

You’ll notice this may seem like a lot, but what we are trying to do is instead of you spending 30 minutes a day crafting, posting and engaging one post at a time, instead we are grouping like activities so you are able to focus on each aspect of production with the best intention.

**FOR SUE, THE SCHEDULE LOOKS LIKE THIS:**

- Each quarter, we craft a promotional calendar at our multiple day-long business planning meeting.
- 1, on Monday, defining the posting schedule for all neighborhoods and determining the copy and creative needed for each of the posts. During this session Sue, with Kendall, outlines the intentional behind posts, clips needed for stories, or rough outlines for lives as well.
• 2 hours, on Wednesday or Thursday of writing, or recording and scheduling posts for the coming week.
• Time daily to check the account, post stories or go live if necessary and engage.

☐ **DIG INTO THE DATA AND INSIGHTS OF YOUR INSTAGRAM ACCOUNT**, with PRO Lesson 2. What are 3 conclusions your insights indicated?

☐ **COMPLETE A BUCKET POSTING IDEA BRAINSTORM**, by listing 10 posting ideas per bucket on the “Posting Idea” tab on the Content Calendar. Use this time to go down an Instagram rabbit hole, to research, and to talk to past customers to understand what they want to see.

_If you find the brainstorm difficult, consider the most frequently asked questions you get from your business. Unsure what those are? Go to Ready Set Gram Video 3 and hear about all the options you have to survey your customers and learn more about them while staying in the IG app. Or, if you are ready to dig deeper, watch PRO Lesson 3 for even more techniques to brainstorm post content._

☐ **DEFINE YOUR VISUAL LOOK.** This can be reflected in the feed and in stories particularly with editing and with the addition of colors, font and other elements. Go back to Ready Set Gram Video 3 to learn more about Visual Style and the editing techniques available right inside of Instagram.

**PHASE 3: GET CREATIVE**

☐ **HAVE A SMALL INSTAGRAM PHOTOSHOOT** so you are not always hunting for an image and always have something to post. Go back to Ready Set Gram Video 5 and 6 to learn about photoshoots and also content ideas for the Feed and Stories. List 5 props you’ll use during your Instagram shoot.
- **USE YOUR CONTENT CALENDAR AND TIPS** from PRO Lesson 3 to define your posting schedule for the week and draft your upcoming week of content. Need support? Want us to review your content calendar? *Send it along and tag us in Slack.*

- **WATCH THE PLANOLY TRAINING VIDEO** developed by Sue in PRO Lesson 3, Video 2 to understand how to use the tool to pre-schedule your Instagram posts.

- **GET YOUR EMAIL MARKETING STRATEGY TOGETHER**, by creating a lead magnet for your business. Don’t have a lead magnet? Listen to PRO Lesson 4, Video 1 to learn more about the process.

- **INCLUDE A PROMOTIONAL POST OR TWO**, marketing your lead magnet in the next 2 weeks of your Instagram posting schedule. Learn ways to market it in each neighborhood in Lesson 4, Video 2. Write a few post ideas you have below.

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- **UP YOUR POSTING GAME** and play with tools found in Lesson 5 and in the Tools and Resource Guide to easily generate creative, animated Instagram stories. This can be found in the BONUSES section of Ready Set Gram. Use the Best Practices Checklist (linked below Lesson 5’s video) for each post to confirm you’ve used all strategic options.

- **CREATE A VIDEO** to use in the feed, stories or IGTV with Wave Video. Learn how in the tutorial included in Lesson 5, Video 2.

- **PRACTICE REPURPOSING** a post from one neighborhood in another as mentioned in PRO Lesson 5.

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**PHASE 4: SELL THROUGH RELATIONSHIP BUILDING**

- **THERE ARE 5 DIFFERENT ‘PLACES’** that I recommend going to discover new people to engage with on Instagram in PRO Lesson 6, brainstorm a few options for each type to start your research.

Hashtags:

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KEEP GOING: PHASE 4
Complementary Accounts:
- 
- 
- 
Competitor Accounts:
- 
- 
- 
Customer Accounts:
- 
- 
- 
Guest Contributions:
- 
- 
- 

☐ COORDINATE A GIVEAWAY for your account, either solo or with a partner. Learn more about Giveaways in PRO Lesson 6.

☐ CRAFT YOUR OWN ‘EVERY LAST DROP’ CHECKLIST that you will use to get everything you should out of every post.
WRITE 5 QUESTIONS OR PHRASES to use to continue your conversations so you are already prepared to respond to commenters on your posts.

USE THE LAUNCH PREP SECTION of Lesson 7 Part 1 to design a launch for Instagram, remember to incorporate moments of interaction, post in all neighborhoods, creatively feature testimonials, and dial into your warmest leads!

IF YOU HAVE A PRODUCT BASED BUSINESS, review Lesson 7 Part 2 to learn how to set up a shop, create a catalog and tag a post with a shoppable post.

PHASE 5: IMPLEMENT ADVANCED STRATEGIES

CREATE DIRECT MESSAGE QUICK REPLIES to use for the main purposes laid out in Video 8—Those that address frequently asked requests, your current and popular offers both free and paid, and anything else you find yourself typing constantly into your DM.

PREPARE 5 DIRECT MESSAGE CONVERSATION OPENERS to use when you start implementing your DM strategy.

ADD AN APPOINTMENT TO YOUR CALENDAR each day or each week to do reach out via direct message. 20 minutes to reach out to 20 people—thank them for being part of your community, or open a conversation about their business.

REVIEW FACEBOOK POLICIES at facebook.com/ads/policies to ensure you know all the rules to follow before you start creating your ads.
FOLLOW THE CATEGORIES mentioned in Lesson 9 Video 2 that are used to brainstorm targeting audiences. Create a list below of 10 audience interests of behaviors you could use.

SIGN UP FOR A BUSINESS MANAGER ACCOUNT, explained Lesson 9 Video 3, to ensure you get the full capabilities of the Facebook Ads Manager.

INSTALL YOUR FACEBOOK PIXEL on your website, as discussed in Lesson 9, Video 3, as soon as you are ready to get started on ads...so you can move onto the next step!

SET UP THE IMPORTANT CUSTOM AUDIENCES as soon as you install your Facebook Pixel, so you can start cultivating your warm audiences. Remember, warm audiences are people that have touched your business — your social account, your website, your email list, your app, etc. Set these up listed below so you start cultivating your warm audience even before you are ready to run your ads. Create audiences with a variety of time frames so that you can use the different audiences to engage people in different stages of your online relationship with them. For instance - within a few days you could use ads to remind someone to purchase a product or download an offer they had recently seen, or after 60+ days, you could use ads to show someone a blog post to remind them about your business. Learn more about audiences in Lesson 9 Video 2.

- All engagement from your Instagram account in 14 days.
- All engagement from your Instagram account in 60 days.
- All engagement from your Instagram account in 180 days.
- All engagement from your Facebook page in 14 days.
- All engagement from your Facebook page in 60 days.
- All engagement from your Facebook page in 180 days.
☐ All visitors to your website in 14 days.
☐ All visitors to your website in 60 days.
☐ All visitors to your website in 180 days.
☐ All visitors to your landing page 3-5 days.
☐ All visitors to your landing page in 14 days.
☐ All visitors to your landing page in 60 days.
☐ All visitors to your landing page in 180 days.
☐ All visitors to your sales page 3-5 days.
☐ All visitors to your sales page in 14 days.
☐ All visitors to your sales page in 60 days.
☐ All visitors to your sales page in 180 days.

**REMEMBER:** you want to collect an audience for each individual sales page or landing page of each individual product or lead magnet to ensure you are able to target those at different places in their journey.

☐ When preparing a landing page or sales page for advertising, review your landing page to ensure it complies with Facebook’s policies before you turn it on. Some important checks to consider are ensuring your page looks branded, providing a cohesive experience for those who are clicking from ad to page, and that you have the proper site privacy policies and terms linked in the footer of the page.

☐ When creating Conversion ads, as shown in Lesson 9 Video 3, create a custom conversion to track the performance of your ads.