



Phorest

Getting  
Started  
with  
Phorest  
Ads  
Manager

# Welcome to Phorest Ads Manager!



Phorest Ads Manager is a revolutionary marketing tool designed specifically for salons, clinics, and spas. It streamlines social media advertising by guiding you through each step – from creating eye-catching ads to targeting the right clients. Whether you're looking to attract new clients, engage existing ones, or win back overdue clients, Phorest Ads Manager makes it easy with advanced targeting capabilities and customizable templates tailored to your business.

What sets Phorest Ads Manager apart is its ability to track both online and offline bookings linked to your ads. By integrating seamlessly with Meta and your Phorest system, it provides clear insights into your return on investment, showing exactly how your ads drive real client appointments. This powerful tool helps you save time, optimize your campaigns, and grow your business with confidence.

# What Makes it So Special?

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Phorest Ads Manager simplifies social media ads, guiding you from creation to targeting the right audience. Here's what makes Phorest Ads Manager stand out:

## Reach New, Existing, and Overdue Clients:

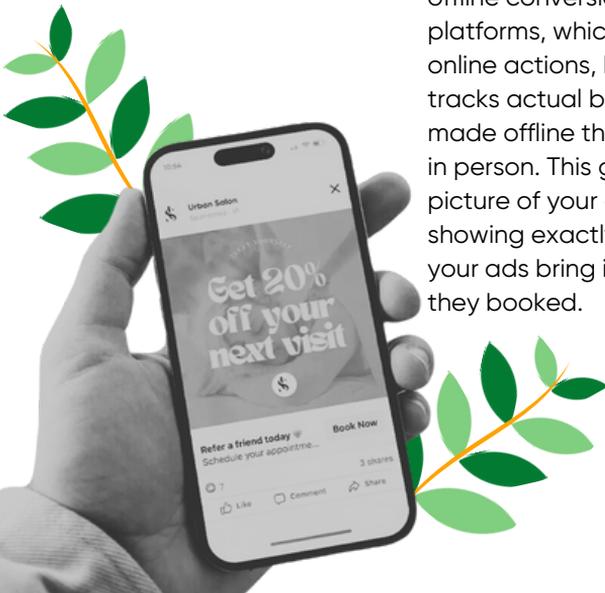
Phorest Ads Manager automatically builds audiences using your booking data, ensuring your Lookalike Audiences are based on real, up-to-date clients who actively engage with your business. This helps you reach new customers who are more likely to book. You can also create targeted campaigns to engage existing clients or bring back overdue ones. This strategic targeting helps deliver the right message to the right clients, maximizing ad effectiveness and boosting client retention.

## Industry-Specific Canva Templates:

Creating ads is quick and easy with Phorest's pre-designed Canva templates tailored to the salon, clinic and spa industry. Whether you're promoting a new service, a seasonal offer, or a popular treatment, these templates help you maintain a professional and eye-catching brand image without spending extra time on design.

## Track Online and Offline Conversions:

One of Phorest Ads Manager's most powerful and unique features is its ability to track both online and offline conversions. Unlike other ad platforms, which can only capture online actions, Phorest's integration tracks actual bookings—even those made offline through phone calls or in person. This gives you a complete picture of your ad performance, showing exactly how many clients your ads bring in, regardless of how they booked.





## Unlock Your Ad Success: ROI and Booking Insights:

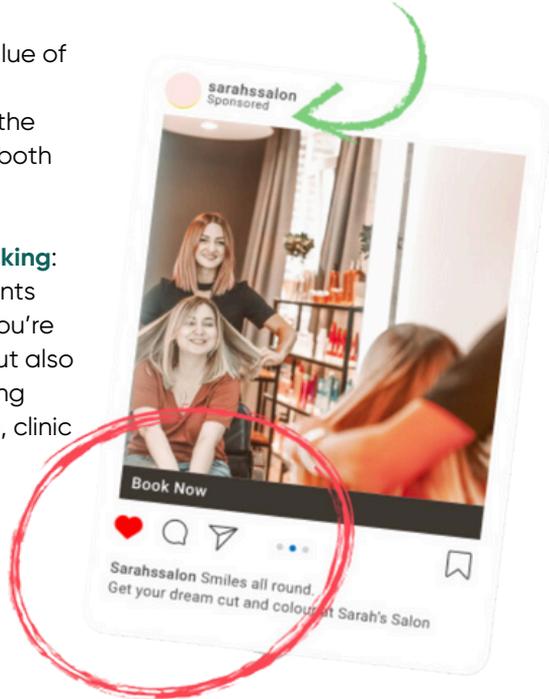
Phorest Ads Manager provides an in-depth look at your ad performance through a range of metrics tailored to the salon and spa industry:

### Client Value and Total Revenue:

- Track the estimated yearly value of clients and the revenue from appointments booked within the conversion window, covering both online and offline bookings.

### Direct and Indirect Revenue Tracking:

- Gain insights not only into clients who book the exact service you're advertising (direct revenue) but also into clients who end up booking other services from your salon, clinic or spa (indirect revenue). This comprehensive view shows you the full impact of your ads, helping you understand the real value they bring to your business.



### Booking Conversions and Revenue Generated:

- Measure conversions and revenue from bookings tied directly to ad campaigns.

### Impressions, Reach, Click-Through Rate (CTR), and Return on Ad Spend (ROAS):

- Gain insights into how many people see and engage with your ads, allowing for data-driven optimizations to maximize return.

Phorest Ads Manager tracks client behaviour across both digital and physical bookings, giving you clear insights into your ad performance. This helps you maximise your marketing ROI and ensure every ad spend delivers results.

# Setting Up Your Account

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Before you begin, ensure you have full control over your Facebook accounts (Business Manager, Page, Instagram, and Ad Account).

## Step 1: Checking Permissions

### 1 Facebook Business Manager Access:

- Log into [Facebook Business Manager](#).
- Go to **Business Settings** and select **People**.
- Click on your username to verify that your account has Admin access (Full Control); this level of access is required to link Phorest Ads Manager.
- If you don't have Admin access, request it from the current account admin.



### 2 Facebook Page Permissions:

- From Business Settings, navigate to **Accounts > Pages**.
- Find your business's Facebook Page, and confirm you're listed as an Admin (Full Control).
- If your role is lower (such as Partial Access), request Admin access.



### 3 Instagram Account Permissions:

- Your Instagram account must be linked to your Facebook Page to access Phorest Ads Manager..
  - Go to your **Facebook Page Settings > Connected Assets** and confirm your Instagram account is connected.
  - Ensure you have access to both accounts through the same Business Manager account.
  - From **Business Settings**, navigate to **Accounts > Instagram Accounts**.
  - Find your business's Facebook Page, and confirm you're listed as an **Admin (Full Control)**.
  - If your role is lower (such as Partial Access), request Admin access.
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#### 4 Ad Account Permissions:

- In **Business Settings**, go to **Accounts > Ad Accounts**.
- Verify that you have full control (Admin) over the Ad Account you plan to use for your campaigns.
- If you don't have Admin access, request it from the current account admin.

**Important Note:** Without full control over these accounts, you may face issues during the ad setup or experience limited functionality with Phorest Ads Manager.

## Step 2: Connect Your Accounts

#### 1 Access Phorest Ads Manager:

- Log into your Phorest account and navigate to the Ads Manager section. **Marketing > Manage My Ads**.

#### 2 Verify Business Manager Settings:

- Make sure the Facebook business ad account and Instagram account are correctly linked under the same Business Manager.
- Confirm you have full control over all assets being assigned.

#### 3 Assign Assets:

- Carefully review and select the appropriate assets, including pages and accounts.

#### 4 Set Up the Pixel:

- Navigate to the pixel section (the last asset in the list).
- If you haven't already created a pixel specifically for Phorest Ads Manager, select the option to create a new one.
- This process ensures accurate data collection and proper integration of your accounts for optimized performance.



## Step 3: Publish a Test Ad



- Verify the connection by publishing a test ad. This ensures that your access permissions are correct and that your accounts and pages have no restrictions.

### To do this:

- Select any campaign objective
- Create an ad. (Don't worry—you can stop the ad before it goes live.)
- If you're able to publish the test ad successfully, congratulations! Your setup is complete, and you're ready to start using Phorest Ads Manager.

Scan the QR code for step-by-step instructions.

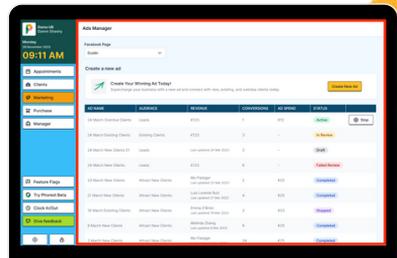


## Navigating the Dashboard

Once your account is set up, it's time to familiarise yourself with the Ads Manager dashboard. Here's a quick overview of the main sections:

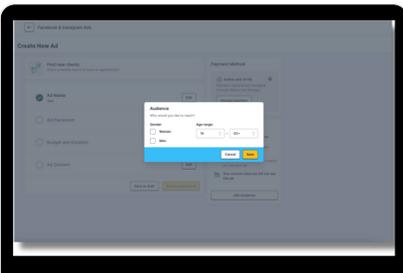
### • Campaigns Tab:

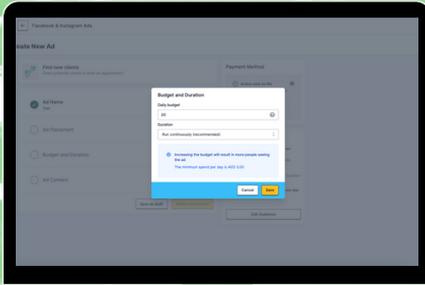
This is where you can create, manage, and monitor all your ad campaigns. You'll be able to see active, paused, and past campaigns, with key metrics displayed for easy tracking.



### • Audience Settings:

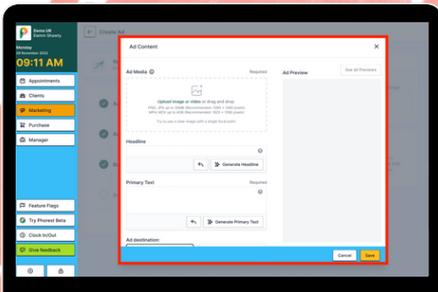
Here, you can define your target audience based on factors, such as age and gender.





- **Budget and Bidding Controls:**

Decide how much you want to spend on each campaign and set daily budgets and duration.

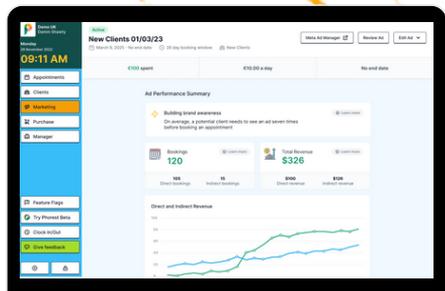


- **Ad Content:**

Here, you can upload the video or image used in your ad, access Canva templates, select the call to action, and set your primary and headline text. You can also use our tool to generate industry-optimized text, ensuring your content is tailored for maximum impact.

- **Analytics and Reporting:**

Here, you can upload the video or image used in your ad, access Canva templates, and set your primary and headline text. You can also use our tool to generate industry-optimized text, ensuring your content is tailored for maximum impact.



# Key Ad Campaign Objectives and When to Use Them

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Phorest Ads Manager provides three campaign objectives tailored to help you achieve specific goals. Here's how they work and when to use them:

## ♥ Find New Clients:

- **Objective:** Use lookalike audiences powered by Phorest's Conversion API to target potential new clients on Facebook and Instagram.
- **How It Works:** The system creates a lookalike audience using your top 1,000 spenders' data (name, phone, email) from your client database.
- **When to Use:** Ideal for expanding your reach when launching a new service, introducing your salon to a broader audience, or growing your client base.



## 🎯 Engage Existing Clients:

- **Objective:** Retarget your existing clients directly from your system.
- **How It Works:** Ads are shown to the top 1,000 spenders from your client database, encouraging them to book their next appointment or explore new services.
- **When to Use:** Perfect for promoting loyalty programs, upselling services, or sharing special offers.

## ✓ Target Overdue Clients:

- **Objective:** Re-engage clients who haven't visited your salon in six months or more but have had at least three visits in the past.
  - **How It Works:** Ads are shown to the top 1,000 spenders from your client database, encouraging them to book their next appointment or explore new services.



- **When to Use:** Perfect for promoting loyalty programs, upselling services, or sharing special offers.

# Setting Your First Campaign Goals

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Before launching your first ad, it's important to define clear objectives. Here's how to get started:

## Identify Your Target Audience:

**Who do you want to reach?** Think about the types of clients who would be most interested in the service you're promoting.

**Consider these factors:**

1. What is the average ticket price for the service?
2. Is the offer relevant and affordable for the clients you're targeting?

## Define the Desired Action:

- **What action do you want your audience to take?**

Are you aiming to increase bookings, promote a new service, or attract first-time clients?

- **Choose the right destination:**

- Think carefully about where you're directing your audience:
  - Your website?
  - A general booking page?
  - A specific service booking page or another landing page?



## Set Your Budget:

- Decide how much you're willing to spend on your initial campaign.
- Phorest Ads Manager allows you to set a daily campaign budget, giving you full control over your spending.

With well-defined goals, your campaign will be more focused, effective, and tailored to achieve the results you want.

## Final Steps Before Launch:

1. Review your ad content for quality and clarity.
  2. Double-check targeting to match your audience.
  3. Set your ad schedule or run it continuously.
- Once ready, click **Submit for Approval** to go live!



# Selecting the Right Service to Promote

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Choosing a service to advertise depends on your business goals. Here are some key strategies:

## Highlight High-Margin Services:

- Focus on treatments that bring significant profit to maximize ROI.



## Seasonal and Trend-Based Services:

- Promote services that align with seasonal trends or current demand. For example, advertise skin treatments during the winter or balayage ahead of summer.

## Introduce New Services:

- Use ads to spotlight new offerings, generating awareness and encouraging clients to try them.

## Boost Underperforming Services:

- Use targeted campaigns to draw attention to services with low booking rates, filling gaps in your schedule.

## Promote Packages:

- Encourage higher client spend by advertising bundled services or special offers.

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## Combining Services and Targeting for Success:

Pair the right service with the right audience to maximize results:

- Promote Seasonal Offers to New Clients: Attract new clients with a trending or introductory service that showcases your salon's quality.
- Upsell Premium Services to Loyal Clients: Retarget existing clients with ads for premium services like luxury facials or hair colouring treatments.
- Offer Discounts to Overdue Clients: Encourage lapsed clients to return with a time-sensitive discount or promotion.

# Crafting an Effective Ad Campaign

Phorest Ads Manager simplifies the process with pre-designed templates, audience insights, and seamless integration with Meta platforms. This page will guide you through designing impactful ad campaigns using tools and strategies tailored to the industry.

## The Elements of a Successful Ad Campaign:

A successful ad campaign combines the right visuals, messaging, and targeting. Here's what to focus on:

- **Clear Objective:** Define the goal of your campaign. Examples include increasing bookings for a specific service, boosting client retention, or attracting new clients.
- **Engaging Visuals:** Use high-quality images or videos that align with your brand and showcase the promoted service.
- **Compelling Copy:** Write clear, persuasive text that highlights the benefits of your service and includes a strong call-to-action (CTA).
- **Precise Targeting:** Use Phorest Ads Manager's targeting options to reach the right audience.

## Using Phorest's Canva Templates:

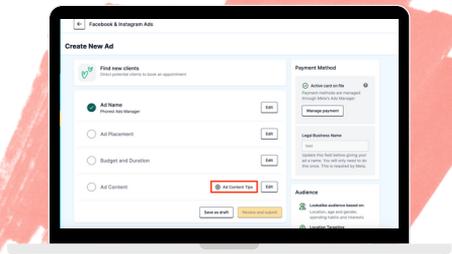
Phorest Ads Manager includes industry-specific Canva templates, making it easy to create professional ads without extensive design experience.

### • How to Access Templates:

- Navigate to the Ads Manager section in Phorest.
- Choose a draft ad and select "Ad Content Tips".

### • Customizing Templates:

Personalize your ad by adding your salon's logo, service images or videos, and tailored text to emphasize discounts or special offers.



## Writing Ad Copy That Converts

Great copy grabs attention and drives action. Here are tips to make your ad copy stand out:

- **Start with a Hook:** Begin with a question or statement that resonates with your audience, such as:
  - "Ready for a fresh look this season?"
  - "Pamper yourself with our exclusive spa offer!"
- **Highlight the Benefit:** Focus on what the client will gain, like relaxation, confidence, or a new style.
- **Include Social Proof:** Mention awards, reviews, or statistics to build trust. Example: "Voted Best Salon in the City 2024!"
- **End with a Strong CTA:** Encourage immediate action with phrases like:
  - "Transform your look – book your session today!"
  - "Limited-time offer – schedule your appointment today!"

### Examples of Ad Campaigns:

Here are some examples to inspire your campaigns:



#### Campaign 1: Attract New Clients

- **Service:** Introductory skin rejuvenation treatment.

**Visuals:** A close-up of radiant, healthy skin with a clean and professional clinic setting in the background.

- **Copy:**

"Achieve Your Best Skin Yet! ✨

Enjoy 20% off our advanced skin rejuvenation treatment—exclusively for first-time clients.

Experience professional care and visible results today.

👉 Book your consultation now—limited availability!"

#### Campaign 2: Engage Existing Clients

- **Service:** Hair color upgrade.
- **Visuals:** A dynamic split-screen of a before-and-after transformation showcasing vibrant, healthy hair.

- **Copy:**

"Refresh Your Look with a Splash of Color! 🌈

Book your next appointment and receive a complimentary colour consultation from our expert stylists.

Don't wait—appointments are filling fast!

🌟 Schedule your transformation today!"

### **Campaign 3: Re-engage Overdue Clients**

- **Service:** Relaxing massage or exclusive wellness package.
- **Visuals:** A soothing image of a serene spa environment, complete with candles and soft lighting.

- **Copy:**

"We Miss You! 🧘‍♀️

Take a break and rediscover relaxation with 15% off your next massage.

Don't let stress win—treat yourself now.

👉 Offer ends soon—book your session today!"

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## **Testing and Optimizing Your Campaigns**

Once your ad is live, monitor its performance and make adjustments as needed:

- **A/B Testing:** Run two versions of your ad with small changes (e.g., different visuals or CTAs) to see which performs better.
- **Performance Metrics: Use** Phorest Ads Manager to track metrics such as:
  - **Impressions and Reach:** How many people are seeing your ad.
  - **Click-Through Rate (CTR):** How many people are engaging with your ad.
  - **Booking Conversions and Revenue Generated:** The number of appointments and revenue directly tied to the campaign.

### **Optimize Based on Data:**

Adjust targeting, visuals, or text based on what's driving the most engagement and bookings.

# Creating Effective Ad Content

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This page provides expert guidance on creating impactful ad content for the hair, beauty, and clinic industries. Discover best practices for crafting compelling ad copy, visuals, and call to actions that captivate your audience and drive bookings.



## Key Elements of a Successful Ad

To create an ad that captures attention and drives action, focus on these essential elements:

- **Headline:** A clear and concise statement that immediately captures attention.
- **Example:** "Get the Glow You Deserve – Book a Facial Today!"
- **Ad Copy:** Compelling and informative text that highlights the benefits of your service.
- **Tips:**
  - Focus on the client's benefit (e.g., relaxation, confidence, rejuvenation).
  - Keep it short and engaging.
  - Use emotive language and a professional tone.
  - Mention any offers or limited-time promotions clearly.
- **Visuals:** Eye-catching images or videos that represent your brand and services.
- **Best practices:**
  - Use high-quality images of your salon, clinic, spa, or services.
  - Include real client results (with permission).
  - Ensure visuals align with your brand's aesthetic.
  - Videos should be short (15-30 seconds) and highlight the service in action.

- **Call to Action (CTA):** A clear prompt telling clients what to do next.
  - **Examples:**
    - “Don’t Wait—Book Now!”
    - “Claim Your Exclusive Offer Today!”
    - “Secure Your Appointment Before It’s Gone!”
    - “Transform Your Look—Schedule Your Visit Now!”
    - “Act Fast—Limited Spots Available!”
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## Using Phorest’s Industry-Specific Canva Templates

Phorest Ads Manager provides pre-designed Canva templates to make creating professional ads easy and efficient. Here’s how to use them effectively:

- **Access Templates:** Log in to your Phorest Ads Manager and browse the library of salon and spa-specific templates.
  - **Customize:** Add your salon’s branding, service details, and offers.
  - **Tips:**
    - Use consistent colours and fonts to maintain brand identity.
    - Update text and images to reflect your unique services or promotions.
  - **Save and Upload:** Once customized, export your design and upload it to Phorest Ads Manager for use in your campaigns.
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## Tailoring Ads to Different Audiences

Different client segments require different messaging. Here’s how to tailor your ad content for each audience type:

- **New Clients:**
  - **Focus:** Introduce your salon and highlight what sets you apart.
  - **Ad Ideas:** First-time discounts, popular services, or client testimonials.
  - **Call to Action (CTA):** A clear prompt telling clients what to do next. Example: “Try Us Today” or “Book Your First Appointment.”



- **Existing Clients:**
    - **Focus:** Promote new services or special offers.
    - **Ad Ideas:** Loyalty rewards, service upgrades, or seasonal packages.
    - **CTA:** “Explore New Services” or “Treat Yourself Again.”
  - **Overdue Clients:**
    - **Focus:** Encourage them to return with personalized offers.
    - **Ad Ideas:** Win-back promotions, reminders of their favorite services, or exclusive deals.
    - **CTA:** “We Miss You – Come Back!” or “Your Next Appointment Awaits.”
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## Best Practices for Ad Copywriting

- **Know Your Audience:** Understand your client’s needs and desires. Speak directly to them.
  - **Keep It Concise:** Clients should understand your message at a glance.
  - **Highlight Benefits:** Focus on what clients will gain (e.g., relaxation, glowing skin).
  - **Include Offers or Urgency:**
    - “Limited Time Offer!”
    - “Book by Friday for 10% Off.”
  - **Stay Authentic:** Maintain your salon’s voice and tone.
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## Reviewing and Testing Your Ads

Before launching your ads, ensure they meet these criteria:

- **Clarity:** Is the message easy to understand?
- **Relevance:** Does the ad speak to the target audience?
- **Engagement:** Are the visuals and copy appealing?
- **CTA:** Is the next step clear?

### **A/B Testing:**

Run two versions of an ad with slight variations (e.g., different headlines or images) to see which performs better.



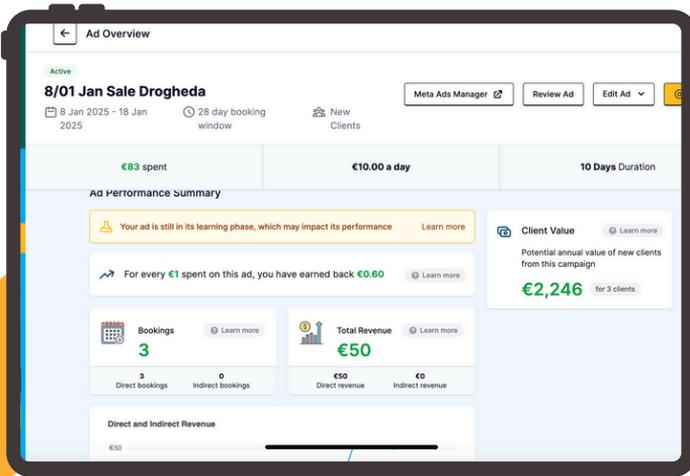
# Measuring Success and Refining Your Strategy

Use Phorest Ads Manager metrics to track performance and refine your strategy.

## Key Metrics to Track:

### Booking Conversions:

- Tracks the number of appointments booked as a direct result of your ad campaigns.
- Why It Matters:** Helps you determine how effective your ad is in driving client action.



### ROAS and Total Revenue:

- ROAS tracks revenue generated per ad spend, while Total Revenue includes online and offline bookings during the conversion window.
- Why It Matters:** These metrics together reveal your campaign's profitability and overall impact.

### Client Value:

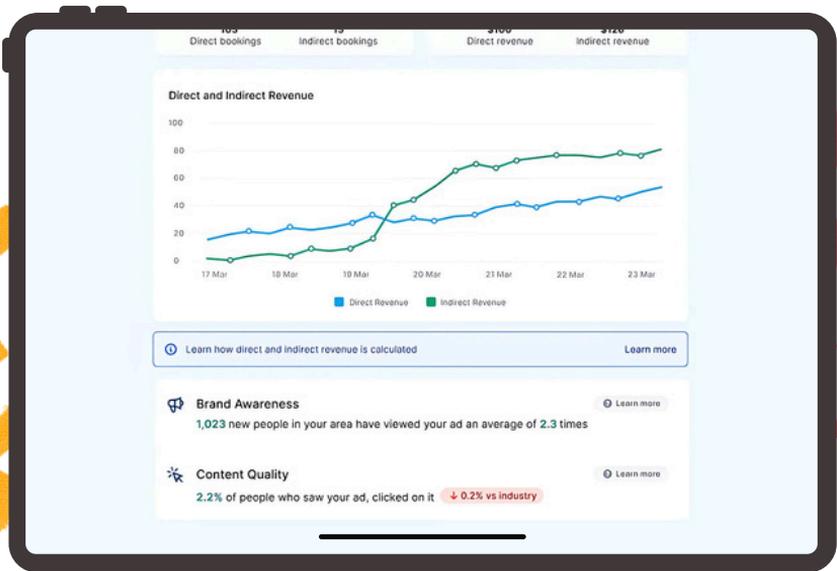
- Estimates the average revenue a customer generates in 12 months, based on data from clients with 3+ visits last year.
- Why It Matters:** Helps you identify high-value clients and focus on strategies to attract similar profiles.

## Direct and Indirect Revenue:

- Direct revenue tracks bookings for the exact service being advertised.
- Indirect revenue shows if clients booked other services at your location.
- **Why It Matters:** Offers deeper insights into how your ads influence client behavior.

## Client Value:

- Estimates the average revenue a customer generates in 12 months, based on data from clients with 3+ visits last year.
- **Why It Matters:** Helps you identify high-value clients and focus on strategies to attract similar profiles.



## Brand Awareness (Impressions and Reach):

- Impressions: The total number of times your ad was displayed.
- Reach: The unique number of people who saw your ad.
- **Why It Matters:** Indicates your campaign's visibility and potential audience size.

## Content Quality (Click-Through Rate):

- The percentage of people who clicked on your ad after seeing it.
- **Why It Matters:** Measures how engaging your ad is to your target audience.

## Example Scenarios

### Scenario 1: High Impressions, Low CTR

- **Issue:** Your ad is being seen but not clicked.
- **Solution:** Revamp your visuals and headline to be more eye-catching and relevant to your audience.

### Scenario 2: High CTR, Low Booking Conversions

- **Issue:** Clients are clicking but not booking.
- **Solution:** Ensure your booking process is seamless and your offer is compelling.

### Scenario 3: Low ROAS

- **Issue:** The campaign isn't generating enough revenue compared to the cost.
- **Solution:** Focus on services with higher profit margins or re-target a more engaged audience segment.



## How to Analyze Campaign Performance

Maximize insights with Phorest Ads Manager's dashboard by focusing on:

1. **Track Key Metrics Regularly:** Monitor metrics like ROAS, Total Revenue, and client conversions to gauge performance and spot areas for improvement.
2. **Identify Top Performers:** Compare campaigns to determine which creatives, offers, or strategies deliver the best results. Replicate successes in future campaigns.
3. **Optimize Audience Segments:** Analyze the performance of targeting options (new, existing, or overdue clients) to refine your strategy and allocate budget more effectively.
4. **Leverage Trends and Insights:** Review historical data to identify seasonal trends or patterns, helping you plan better campaigns in the future.
5. **Set Measurable Goals:** Use insights from the dashboard to set actionable goals and align campaigns with your business objectives.

## Refining Your Strategy

Based on your metrics, use the following strategies to optimize future campaigns:

### 1. Adjust Targeting:

- If your Click-Through Rate (CTR) is low, refine your audience by changing age and gender.
- Test different targeting options (e.g., new clients vs. overdue clients).

### 2. Optimize Ad Content:

- If booking conversions are low despite high CTR, adjust your CTA or landing page.
- Test new visuals, messaging, or offers to see what resonates more with your audience.

### 3. Focus on High-Performing Services:

- Promote services that consistently drive high direct and indirect revenue.

### 4. Reallocate Budget:

- Invest more in campaigns with high ROAS.
- Reduce spending on campaigns that aren't delivering results, and try a different approach.

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## Using Insights to Drive Long-Term Growth

Tracking and refining your campaigns not only improves short-term results but also provides valuable insights for long-term planning:

- **Client Preferences:** Learn which services are most popular and adjust your offerings accordingly.
  - **Seasonal Trends:** Identify booking patterns and tailor your campaigns for peak and off-peak times.
  - **Budget Allocation:** Focus your ad spend on strategies that consistently deliver the best results.
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