Shoppable Media Playbook

A plan template for creating effective shoppable media.

cadettejewelry

🛍 NOEMI EARRINGS

Noemi Earrings $180 »
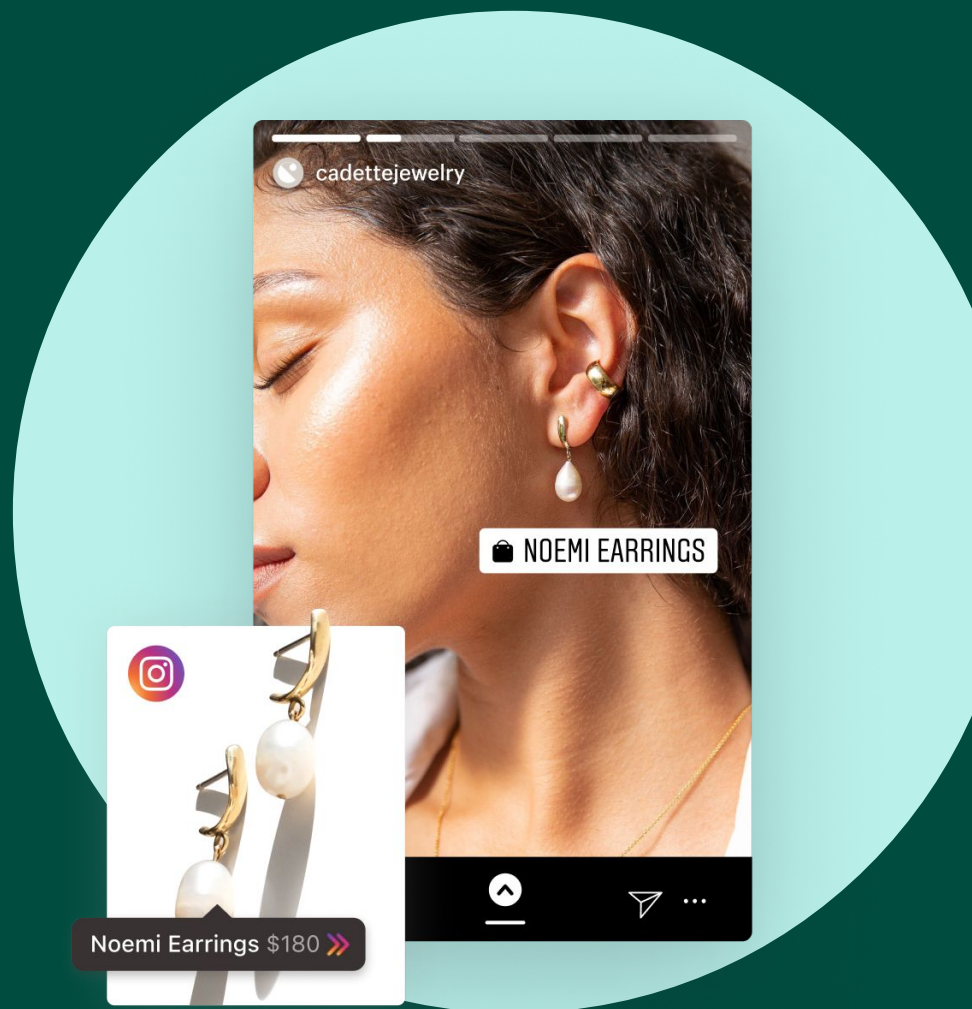
Featured Merchant: Cadette Jewelry

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Optimize for Success

The Basics Checklist

Following these steps will help you streamline tagging, control reliable data sharing and delight shoppers.

☐ **Onboard to the Facebook Channel**
Onboarding is even easier if you're already using Shopify. Connect to the Facebook Channel, if you haven't already, to help you access paid and organic tools on Instagram.

☐ **Enable Data Sharing Settings**
Select from Standard, Enhanced and Maximum data sharing settings in the Facebook Channel. Maximum Data Sharing enables Conversions API, which lets you share customer actions directly from Shopify's server to Facebook.

☐ **Set up Instagram Shopping and Connect your Catalog**
The best shopping experiences drive consideration and conversion through clear, consistent, descriptive, high-quality catalog data and imagery. When you set up the Instagram Shopping feature within the Facebook channel, the channel will create a product catalog automatically for you.
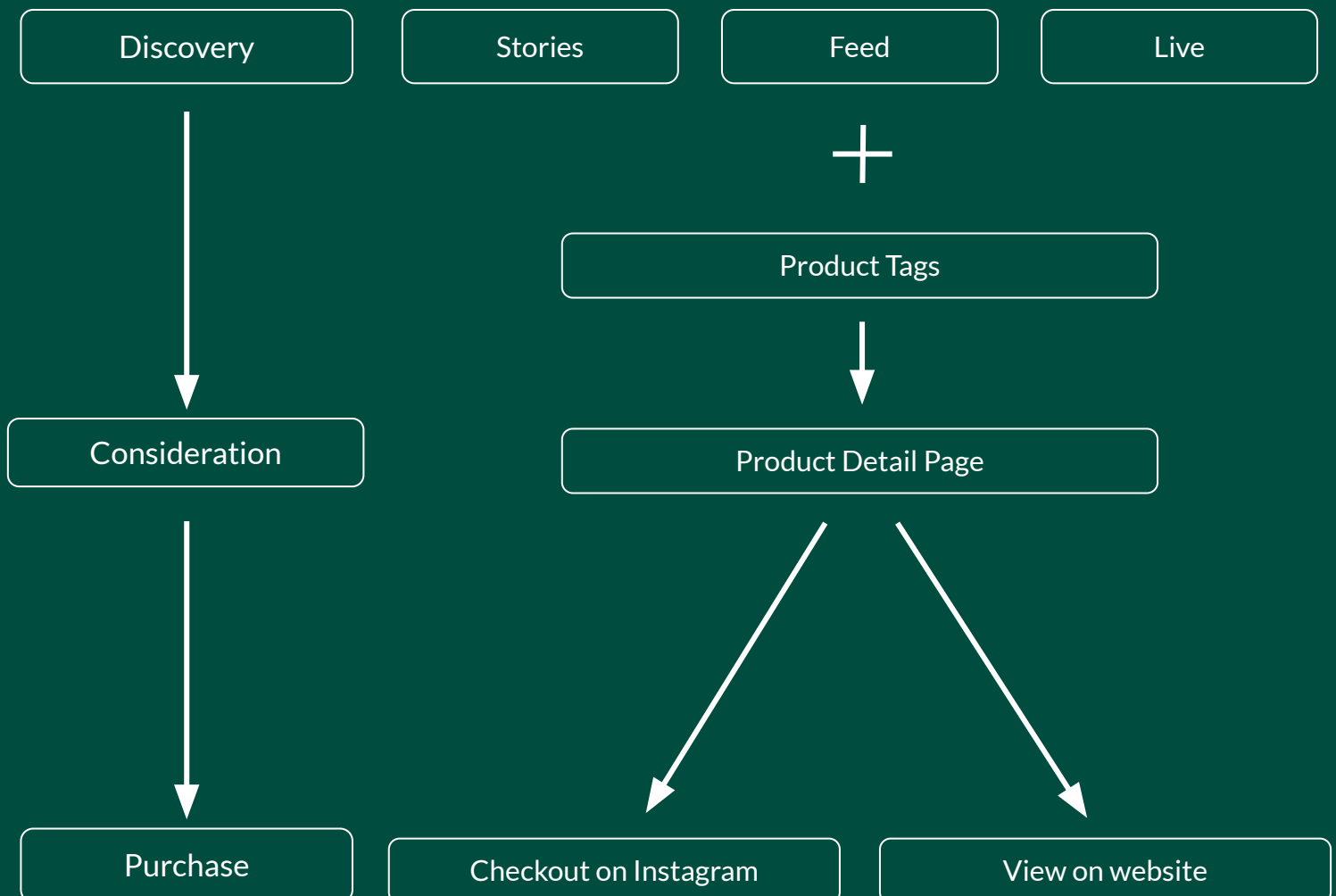
[Learn more about setting up the Facebook Channel](#).

Product Tags 101

Product tags are a foundational tool for Instagram Shopping businesses that help to reach customers across different places on Instagram.

Tip:

Test tagging diverse content types across Instagram to help engage with your audience.

Discovery	Stories	Feed	Live

+

Product Tags

Product Detail Page

Discovery → Consideration → Purchase

Product Detail Page → Checkout on Instagram

Product Detail Page → View on website

Tags on Instagram

The path from discovery to purchase is not linear on Instagram. We've built Shopping tags for businesses to tag their products across Instagram so people can easily shop wherever they find joy in the app. You can tag feed posts, stories, Reels, IGTV, and Live. Checkout enabled Shopping businesses are eligible to tag Live feeds.
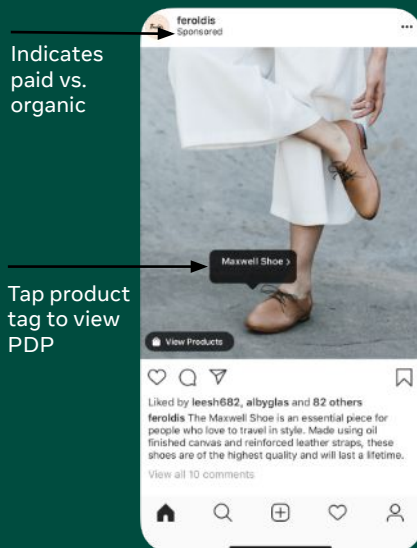
[Watch this video to learn how to tag products on Instagram.](#)

Product tags

Product Mentions

Tag to reveal product tags
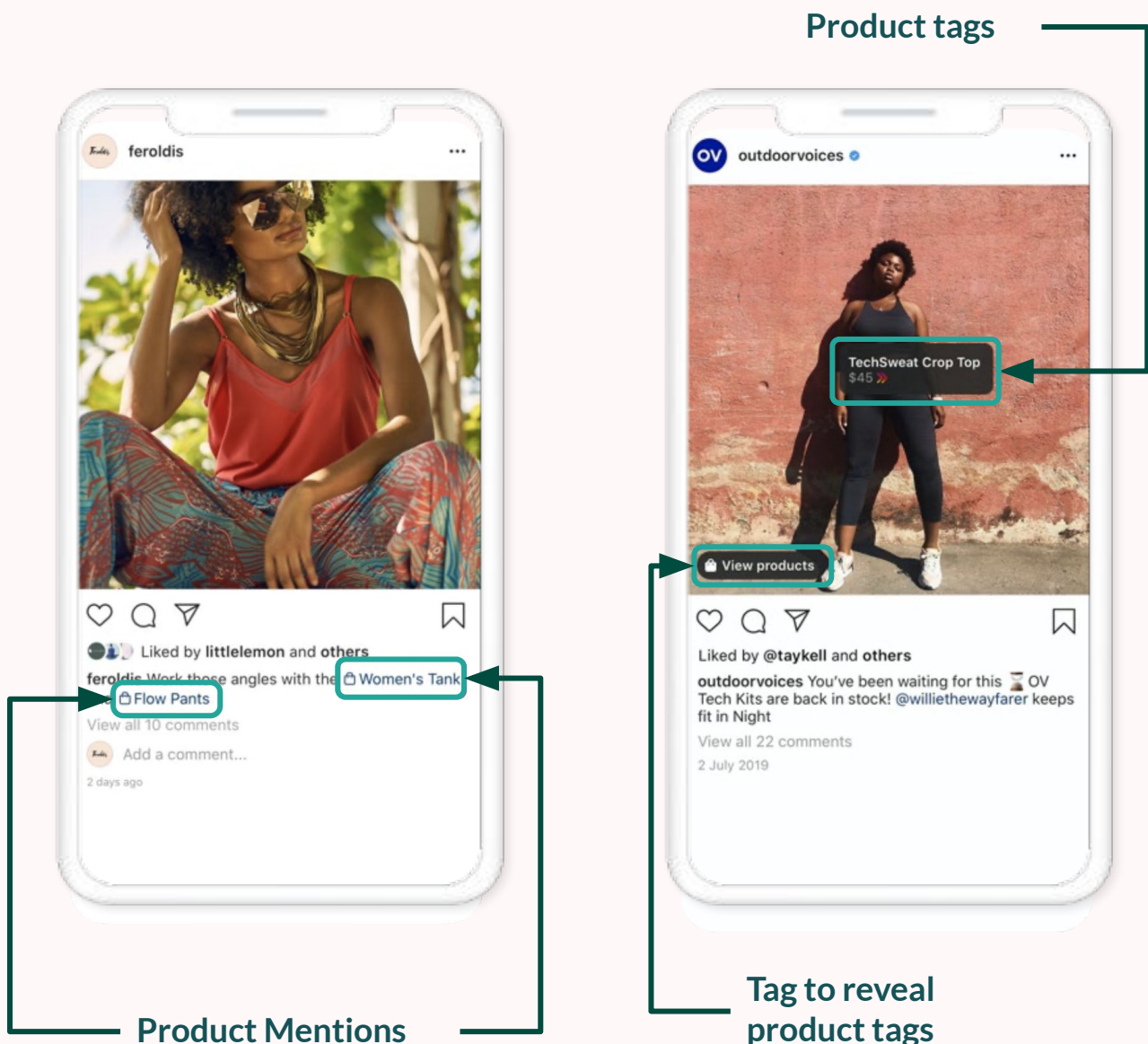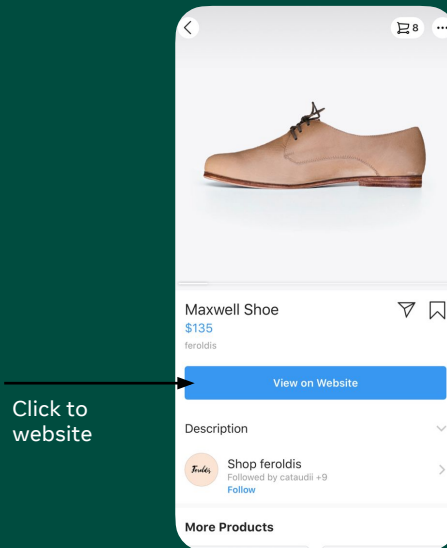
Product Tags – Flow

Product tags take customers to the Product Detail Page (PDP) for the tagged product. PDPs can contain relevant information like pricing, images or videos and how to purchase.
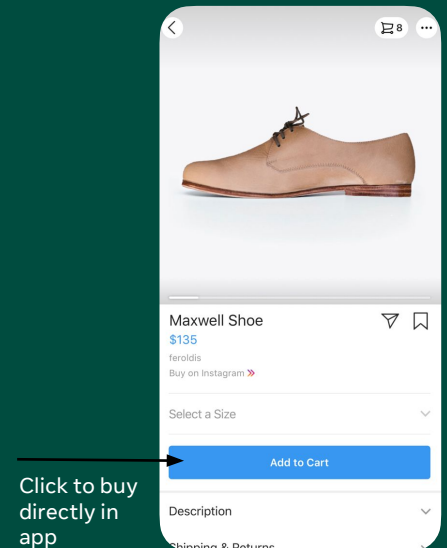
Ad in Feed

Product Details Page

Indicates paid vs. organic

Tap product tag to view PDP

Click to website

Click to buy directly in app

Product tags are shoppable tags so people can learn more about your products

Ads with product tags drive traffic to a PDP at scale with a CTA to visit the website

Ads with product tags and checkout let people purchase without leaving the app

Product Tags 101

How to Tag Feed Posts

Enable Shopping Right at the Moment of Discovery: As your customers are discovering your products via Instagram, Instagram Product Tags enable your customers with the ability to make a purchase directly within the app or learn more about the product via your website at the moment of discovery.

Show Off Your Product to More People: If your goal is to get your product in front of more customers, tagged products have the opportunity to be highlighted on Instagram's Explore and Shop tab.
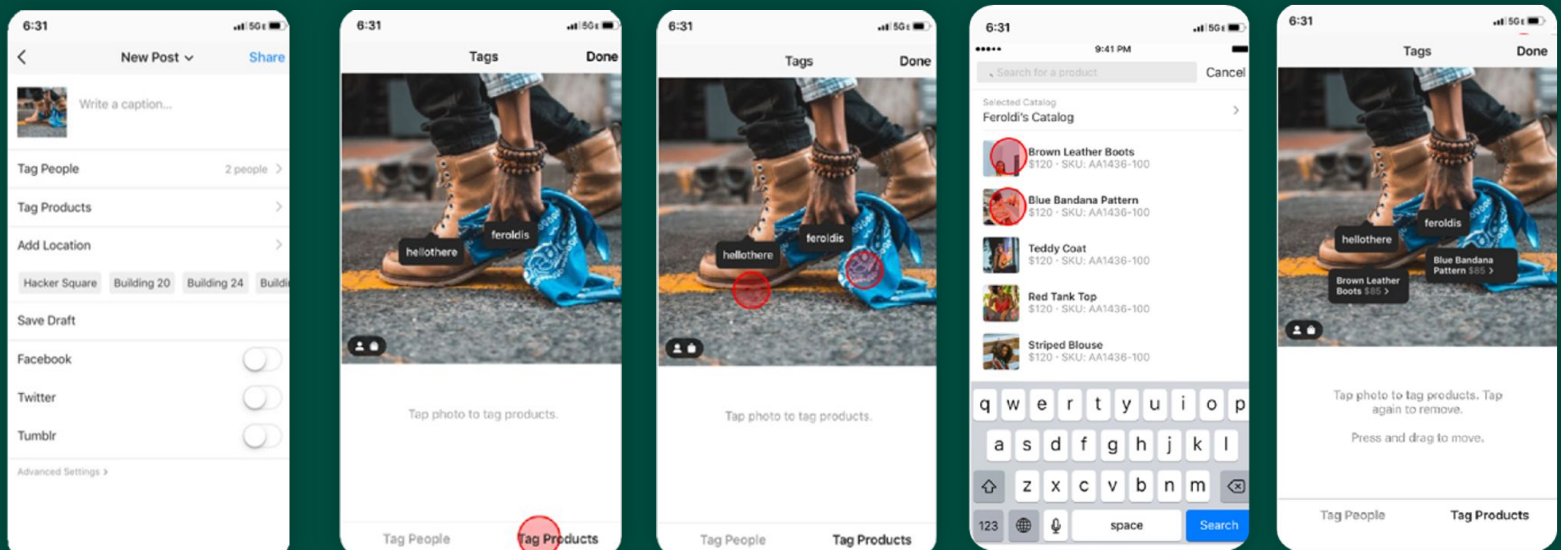
Tap "Tag Products" to open tagging menu

Tap "Tag Products" to enable product tagging

Tap photo where you would like to add product tags to

Select product catalog where your product resides, then select items

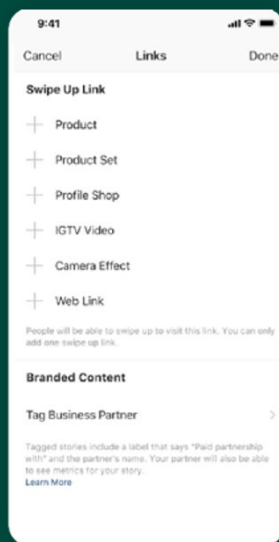Review product tags then hit done to return to feed post creation page

Product Tags 101

How to Tag Stories – Swipe up to PDP

Enable Shopping Right at the Moment of Discovery: As your customers are discovering your products via Instagram, Instagram Product Tags enable your customers with the ability to make a purchase directly within the app or learn more about the product via your website at the moment of discovery.
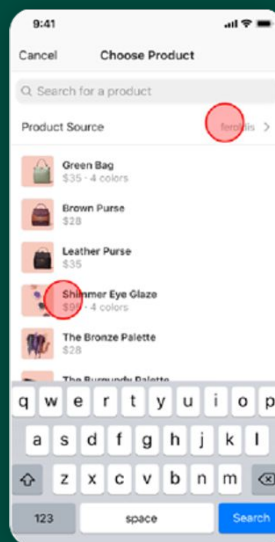
Use stories to address common questions such as sizing and fit that come through to help inform your followers about your product.
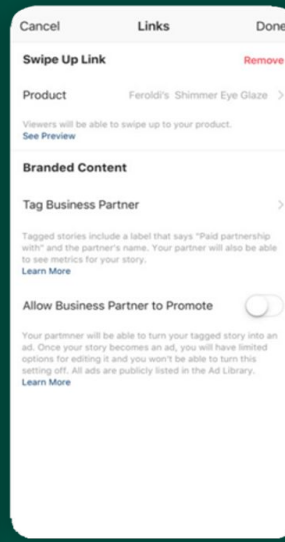

Tap the icon to open your Story links menu

Tap "Products" to view the available products to tag

Select product catalog where your desired product is located

Review the Swipe Up Link to ensure it's correct

Tap 'Your Story' icon to add content to your story
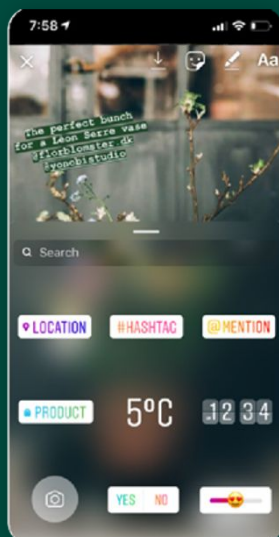
Product Tags 101

How to Tag Stories – Product Stickers

Enable Shopping Right at the Moment of Discovery: As your customers are discovering your products via Instagram, Instagram Product Tags enable your customers with the ability to make a purchase directly within the app or learn more about the product via your website at the moment of discovery.
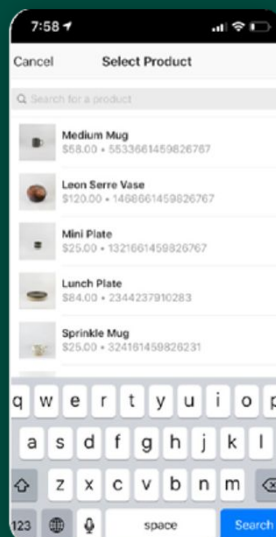
Use stories to address common questions such as sizing and fit that come through to help inform your followers about your product.
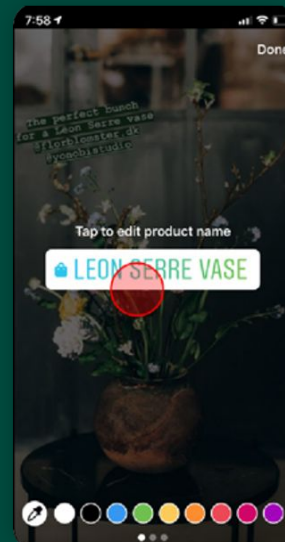

Tap sticker tray icon to pen up your sticker tray

Tap the product sticker

Tap the product that you'd like to tag in your story

Tap product sticker to change the color and edit the product name

Tap the "your story" icon to add the comment to your story

Product Tags – Do's and Don'ts

What types of content work? How many tags is too many? What formats make sense? Consider these tips when you build your tagging strategy.

Do	Tag all available products in your content.	Use all available formats to create shoppable content by tagging products in feed, Stories, Reels and more. It's important to diversify the formats you use to drive discovery.	Use a mix of images and videos when you tag products so that they appear in the top carousel of your product detail pages to show a variety of ways the product can be used in an eye-catching way.
Don't	Overcrowd your content with tags, so people can't see the items clearly.	Only use Shopping tags on Feed posts.	Let tagged content expire from your profile.
Try	Learn what number of tags in posts works for you. Try tagging a maximum of three.	Tag products in your Stories using both a product sticker AND swipe-up to PDP, together.	Turn on auto-highlight in stories so your tagged content lives on in Product Detail Pages after the story disappears.
Try	Save and turn your tagged Stories content into a highlight so people can shop products from your Stories after they expire. Try giving it a title like "Shop" to make the highlight even clearer.	Try tagging items at different price points to learn more about what your audience engages with and is interested in learning more about .	Heavy-up on shoppable posts in the lead-up to a new launch or during a brand or marketing moment to maximize the opportunity for product discovery.

Collections

Collections allow businesses to customize their shop with an editorial point-of-view by curating products into themes to help tell their brand stories.

Customizable experience
Shops are a place for people to experience the joy of shopping versus the chore of buying. Businesses can use collections to create a shop experience tailored to their followers.
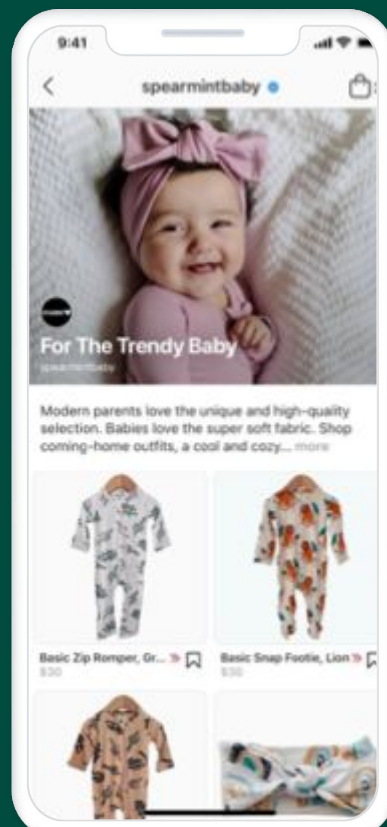
Own your own brand story
People experience a brand's story across all of Instagram. Collections are a new way for businesses to own their brand story on Instagram by infusing their look-and-feel and tone of voice into a shop. Learn more about collections on Facebook and Instagram.

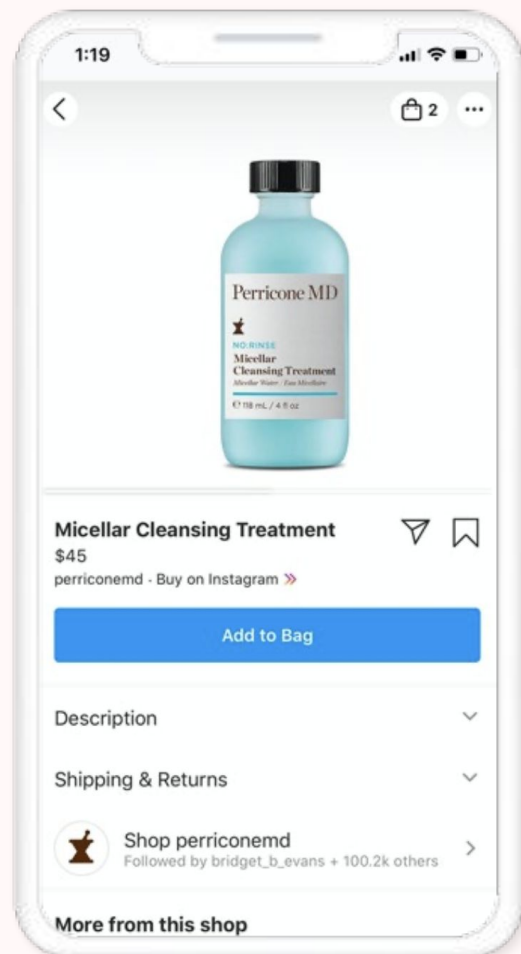Customizable Experience
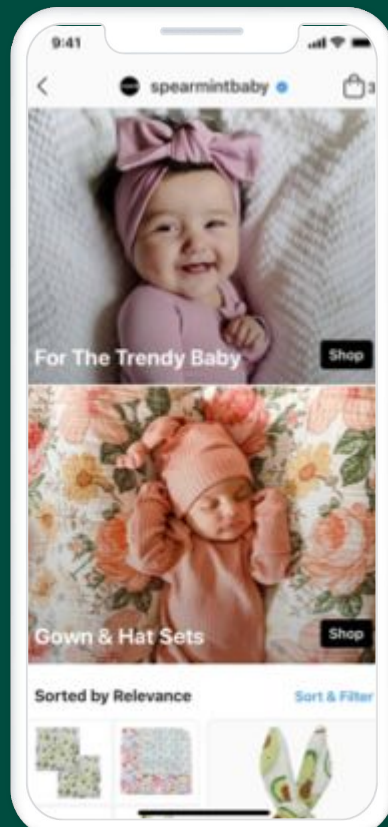
Own Your Brand Story

Shopping Tag to PDP

Shopping tags take people to the Product Detail Page (PDP) for the tagged product.
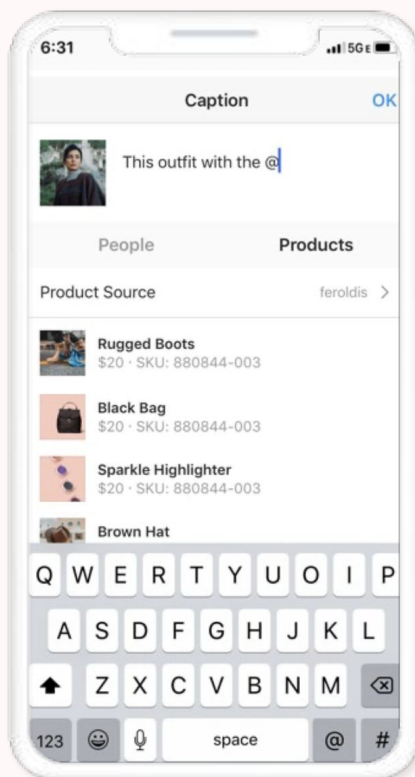
Shopping Tags

Product Detail Page

How to Tag Product Mentions

Product mentions can be used in profile bio and feed media captions to drive to a Product Detail Page (PDP).

Step 1:
When creating the caption for a Feed post, use the @ symbol to open the tagging menu and navigate to Products. Tap the product you want to tag from the list.
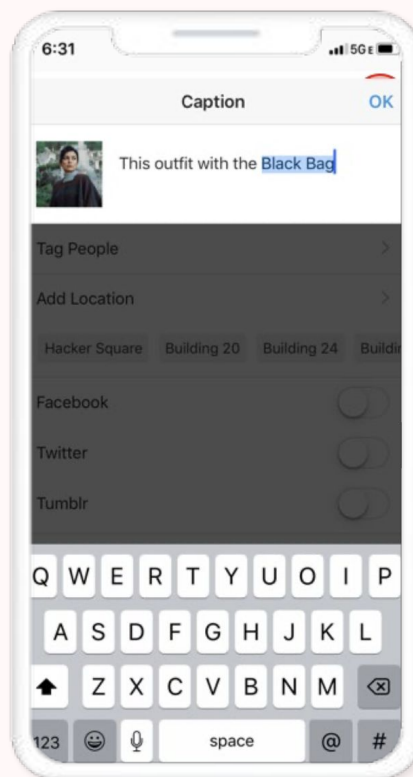
Step 2:
The tagged product will appear highlighted in the caption. When you are finished editing your caption, tap "OK" to publish the photo to your feed .
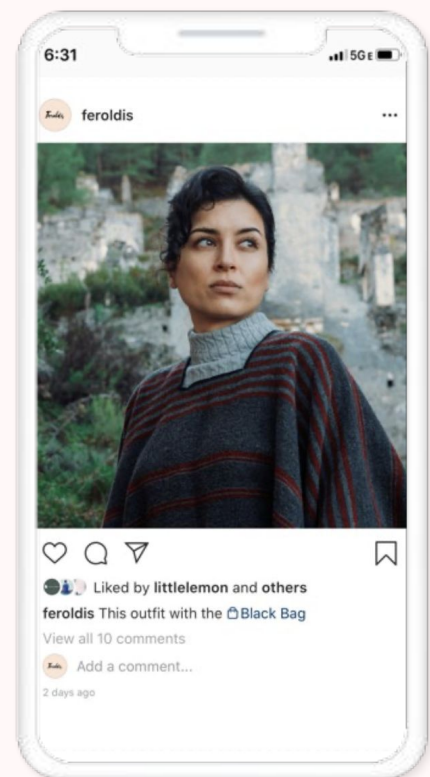
Step 3:
Once published, the product mention will appear as a clickable tag within your Feed post's caption.

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

Start with
Mobile Best Practices for your video content

Short Duration [2]

6-10 seconds tends to be the sweet spot for most high performing direct response ads
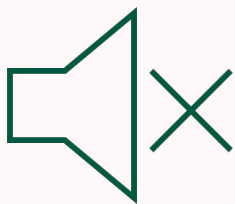
Design for Sound Off [2]

Just in case the user has their phone on no volume mode

Frame your visual story [2]

Vertical (4:5, 2:3 and 9:16) and square videos tend to work best on mobile

2 - "9 Views on Video" by Facebook Business, July 2018

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

Best Practices
Direct Response Advertising

Static + Video work better together [3]
Mixed format (static plus video) campaigns have a positive impact for DR advertisers on lower funnel metrics.

Highlight the brand early [3]
Brand association within 3 seconds of a video's start is positively correlated with conversion lift.

Showcase the product or service [3]
Showcasing the product or service being advertised for most of the video correlates with conversions.

Get noticed [3]
Being noticed is positively correlated with conversion lift. Get noticed using thumb-stopping visual techniques.

Provoke and promote [3]
Ask questions, show promotions, and keeping the text copy under 280 characters are associated with higher DR lift.

Play More With Formats [3]
Create more, learn more, play more. Test multiple formats to understand what works best for your audience.

"Creative Considerations for Direct Response Campaigns" by Facebook Business, Aug 2018

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

4 steps to identifying
Barriers & Motivators

Barriers	Motivators
(*Reason **not to** purchase*)	(*Reason **to** purchase*)

1   **CAPTURE** all possible reasons that would either encourage or prevent a consumer from entering your category or buying your product. When you get stuck, consider all different types of people, different times of year/week/day.

2   **CHOOSE** the top 3 barriers or motivators that feel like the biggest opportunity to convert potential buyers.

3   **DIFFERENTIATE** Do your best to ensure that these motivations are not attracting the same or similar audience.

4   **MAKE.** Build your video, lightweight animation or static creative associated with your key barriers & motivations.

Tip: Struggling to build new creative? Use existing assets by simply changing the copy.

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

Next
Map your messaging

After listing all the potential barriers and motivators a customer might experience in interacting with your product, match those to benefits, Reasons-to-Buy (RTBs), and Call-to-Actions (CTAs) -- And use that as a jumping off point for a concept.

Barrier	Motivator	Benefit	Reason to Buy	Call to Action	Theme
"I don't want to buy soda online" [*example*]	"There's a store around the corner" [*example*]	"You can try ClubS risk free" [*example*]	"Free shipping and Returns" [*example*]	"Sign Up Now" [*example*]	"Sample a soda risk free"
Barrier 1	Motivator 1	benefit	RTB	CTA	Theme 1
Barrier 2	Motivator 2	benefit	RTB	CTA	Theme 2
Barrier 3	Motivator 3	benefit	RTB	CTA	Theme 3

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

4 ways to
Add Motion to Static Images

Now that you have mapped your messaging to different audience barriers or motivators, you may consider adding motion to different elements of your designs and analyzing the results.
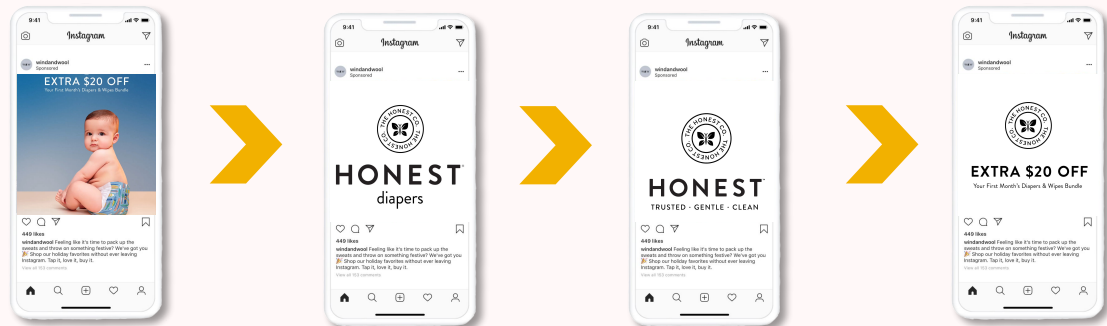
	Basic Motion	Brand in Motion	Benefit in Motion	Demo in Motion
	Animate 1-2 elements with motion in the first seconds.	Bring the elements of the brand or logo to life in the first 3 seconds.	Animate the benefit or message in the first 3 seconds.	Focus on visualizing how get from point A to point B.
Message 1	✔️			✔️
Message 2		✔️		
Message 3	✔️		✔️	

Content Strategy Template

Follow these best practices and worksheets to build content that drives action.

Motivation-based Strategy

Explore the customer's relationship to your product. Work to understand what would trigger a shopper to purchase or not to purchase. Understanding these motivations will help you appeal to customers that are less convinced.
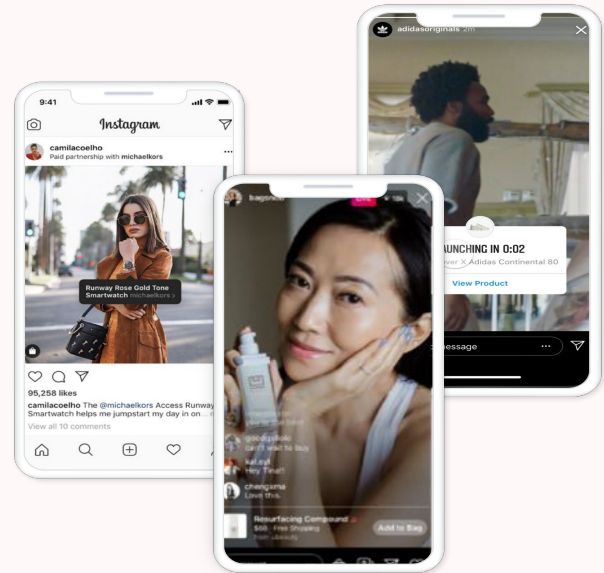
"There won't be a flavor for me"	"I don't want to buy soda online, there's a store around the corner."	"I care about craft and all-natural ingredients"
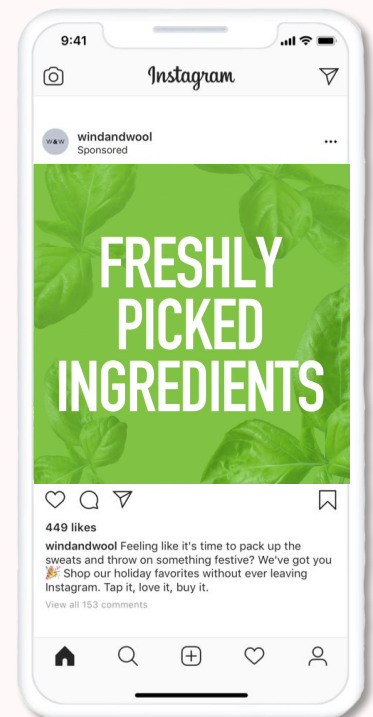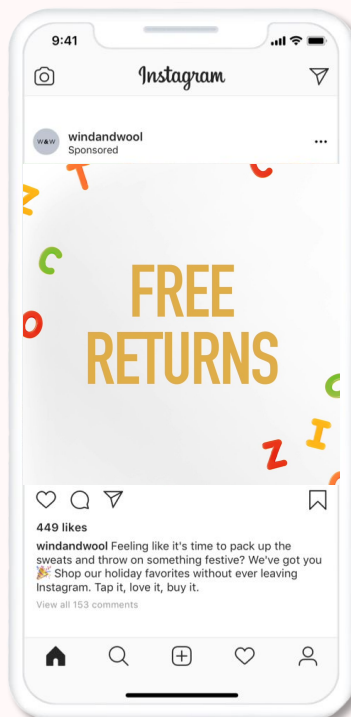
New formats for every stage of the funnel

When building your content strategy, it is helpful to consider how specific Instagram formats can be suited to different phases of the customer journey.

Map your content strategy to the customer journey

Consider planning your content tagging strategy to match formats with the customer journey. Feed posts and stories feature short format content well suited for discovery. Long form content, such as Live, can be an effective loyalty strategy to engage your customers. Try multiple formats to learn which connects with your audience.

(Map your tagged post in each box)

| Max Duration		Discovery	Consideration	Purchase	Loyalty
15 sec	**Feed**	Product Shot Carousel (example)			
15 sec	**Stories**		Testimonial Video (example)		
30 sec	**Reels**				
1 hours	**IGTV**			Demo video (example)	
4 hours	**Live**				"Live Webinar" Live stream (example)

Product Tagging 102

How to tag Reels

Reels allows your business to create and edit short form videos up to 30 seconds long. Get creative with easy-to-use text, AR filters and audio to tell your brand's story. Reels feature a broader range of video editing tools. For instance, you can combine multiple videos with seamless transitions.
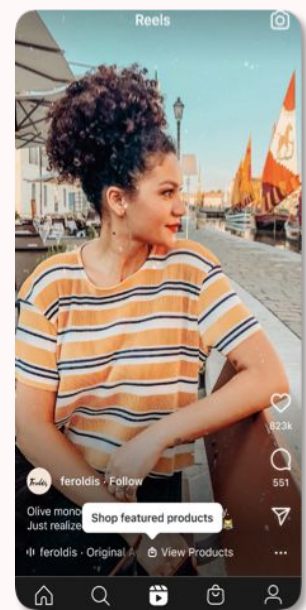
Reels may appear on the Explore page where they are available to the entire Instagram community.
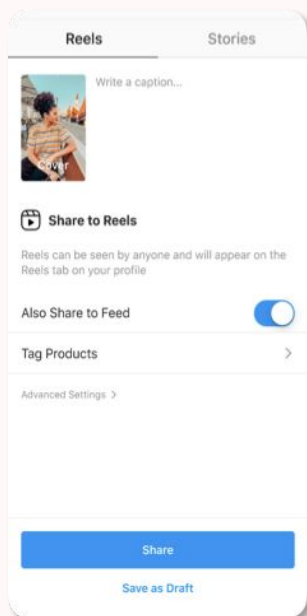
Step 1
Once you've recorded your Reel, tap on "Tag Products"
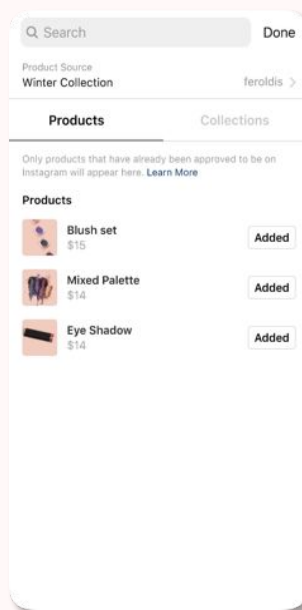
Step 2
Tap Tag Products and select the product(s) or collection you'd like to feature.

Step 3
Post to your Feed and share to Stories to promote your new reel.
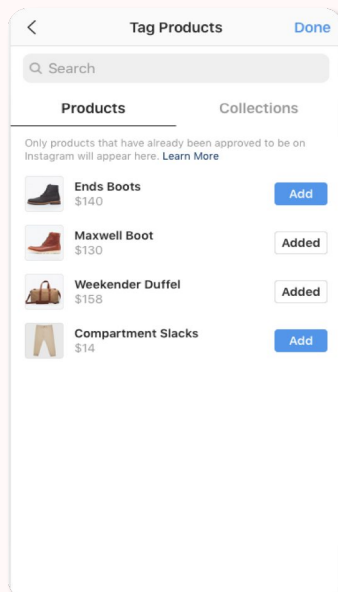
Product Tagging 102

How to tag IGTV

IGTV is long-form, immersive video that makes it even easier to tell your brand's story, connect with your audience, and reach more people. The great part about it is that it isn't just limited to one minute and takes over your entire screen. you can tag up to 30 products or a collection to feature in your IGTV video.
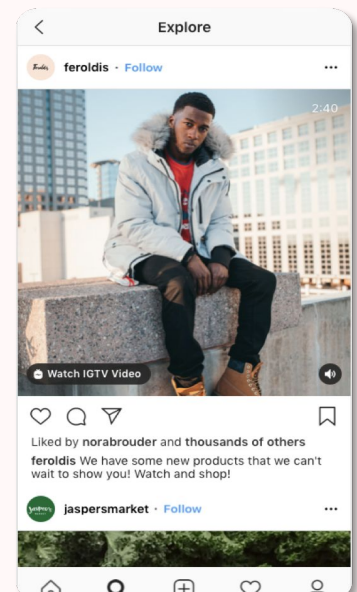
Tip: Highlight your IGTV video so it can be pinned permanently on your profile.
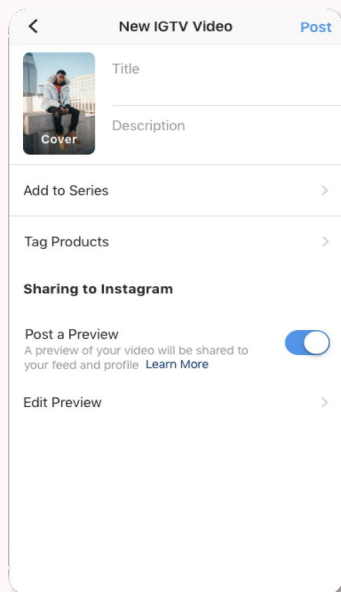
Step 1
Once you've uploaded your IGTV video, tap on "Tag Products".

Step 2
Add products you featured in your IGTV vide. You can also include similar product(s) that your viewers might be interested in.

Step 3
Post your Feed and share to Stories to promote your new video.

Product Tagging 102
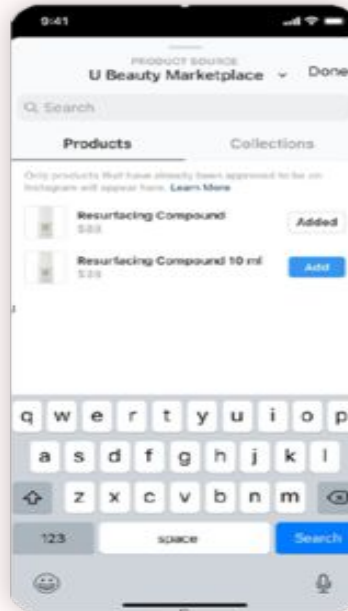
How to tag Live – Product Tags

Live Shopping unlocks a new channel for businesses. By tagging products in Instagram Live broadcasts, customers can purchase in real-time. When someone you follow shares a live broadcast, their profile picture will appear at the top of Feed with a colorful ring around it and the word Live.

Pro Tip: You can share a live broadcast from your Live Archive to IGTV to make it easier for customers to discover your product.
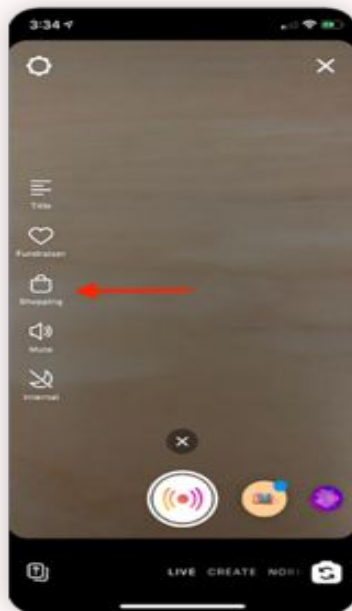
Step 1
Before going Live, tap the on the shopping bag icon on the left side of the screen.

Step 2
To tag individual products, tap "Add" next to the product(s) you want to have tagged in your Live. To tag collections from your shop tap "Collections" and select your collection.
.

Step 3
Tap "Live button" to begin Live Video.

* Available to U.S. businesses that use [checkout on Instagram](link)

Product Tagging 102

How to tag LIVE – Pinned Products

While you are Live you can choose products to pin from the product tags you selected previously.

Step 1
While you're Live you can Pin 1 product at a time by tapping the Shopping bag icon in lower right.

Step 2
Confirm the product you're using by tapping "Pin".
.

Step 3
To unpin a product, tap the shopping bag then select "Unpin".

* Available to U.S. businesses that use checkout on Instagram

Pre-Promotion using Product Launches

Use Tags to build awareness

The product launch feature allows you to tag and build awareness around product(s) that will become available for purchase in the future. When you set up a Product Launch on Instagram, people can learn more about your product(s) through the following:
.

- **Stories.** People can tap a product launch sticker to set a reminder or see product details.

- **Feed.** People can view product launch tags that show the launch date and tap to see product details and to set a reminder.

- **IGTV videos.** People can set reminders for your pinned launch product(s).

- **Reels.** People can set reminders for launch products featured in your reel.

- **Live broadcasts.** People can set reminders for your pinned launch product(s). An hour before launch, a countdown will be displayed to your viewers. At launch time, a confetti effect will display to announce your launch and the countdown will change into an "Add to Cart" button.

* Available to U.S. businesses that use [checkout on Instagram](link)
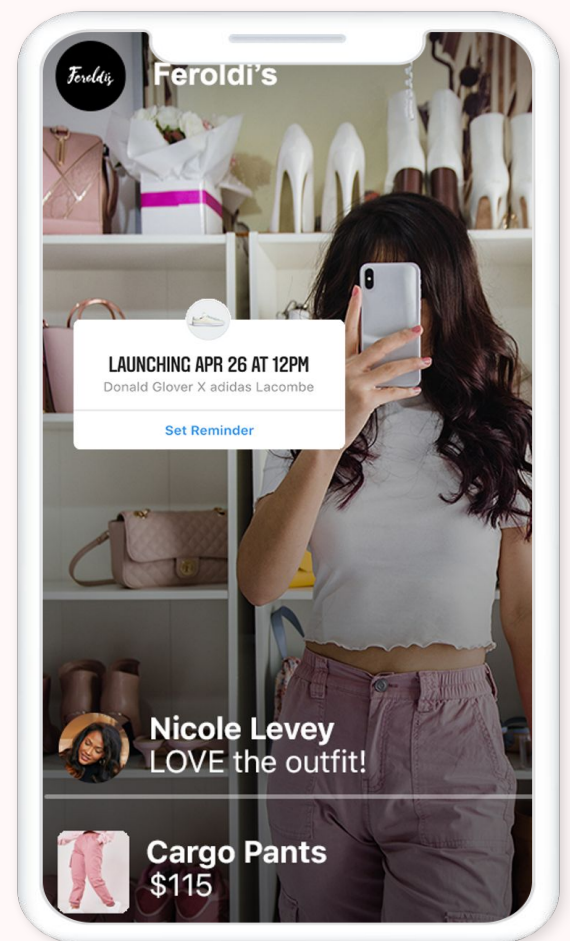
Pre-Promotion using Product Launches

Pre-Launch checklist

☐ Choose a new product or collection to feature and select a launch date.

☐ Consider the amount of inventory you have set aside for IG specific purchases. Be sure to monitor sales to ensure fulfillment.

☐ Create at least 4 pieces of content for launch, including cover images, Feed post images and videos.

☐ Set up a Shopping Engagement custom audience to retarget interested shoppers post launch.

☐ Select the shop for your launch in Commerce Manager. Click product launches under Promotions tab. Learn more

☐ Launch tagged promotions at least 3 days before the launch.

☐ Educate your audience. Show them how to enter their credit card info early so they can buy quickly and easily at launch.

☐ Set up a Shopping Engagement lookalike audience to reach new customers post launch.

* Available to U.S. businesses that use checkout on Instagram

Branded Content

Tips

Branded content allows a brand to find new customers, build advocacy, and drive business impact at the intersection of culture and advertising. Creators can help you tell your brand story through content that's authentic to them while still being on-brand for you.

Tips Recommended

- Work with creators who naturally talk about product and brand recommendations
- Let creators in on the process so it feels organic
- Use branded content disclosures for transparency
- Consider your goals: awareness, engagement, brand positioning, etc
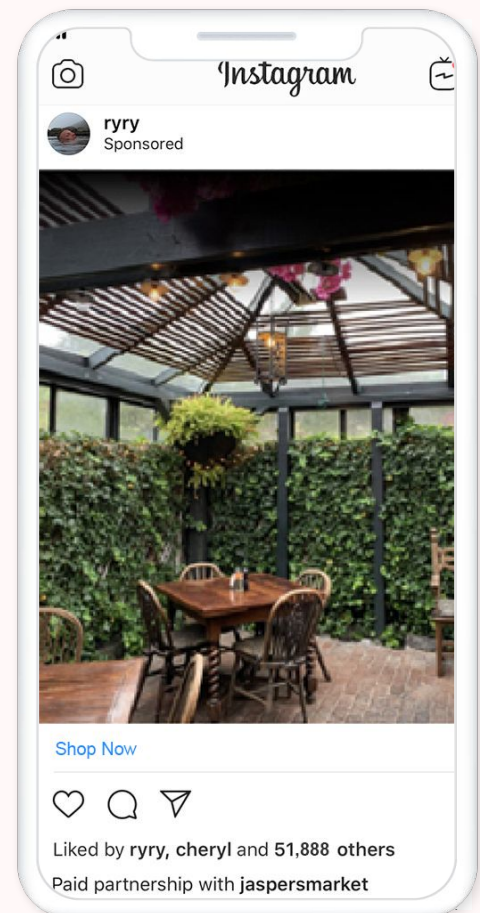
Turn organic shopping into an ad strategy

Drive Product Discovery

Help people consider your products

Drive them to purchase

Use Ads with Product Tags to scale your products and drive interactions such as clicks to product detail page visits

Retarget Shopping Engagement Custom Audiences with different ad types to move them closer to purchase

Use the Shopping Lookalike Audiences that you have created from your retargeting efforts, and reach them with more ads with product tags to grow your potential customer base

The Basics Checklist

Following these steps will help you streamline tagging, control reliable data sharing and delight shoppers.

1) Onboard to the Facebook Channel
Onboarding is even easier if you're already using Shopify. Connect to the Facebook Channel, if you haven't already, to help you access paid and organic tools on Instagram.

2) Enable Data Sharing Settings
Within the data sharing settings in the Facebook channel, you have three options you can choose from: Standard, Enhanced, or Maximum, which allows you to enable Conversions API.

3) Set up Instagram Shopping and Connect your Catalog

The best shopping experiences drive consideration and conversion through clear, consistent, descriptive, high-quality catalog data and imagery. When you set up the Instagram Shopping feature within the Facebook channel, the channel will create a product catalog automatically for you.

Building an Ad Strategy

Where it all starts - Ads with Product Tags 🏷️

Ads with Product Tags allow you to maximize the reach of your products by boosting shoppable posts or creating the ad from scratch in Ads Manager for more creative flexibility.

- **Expand Reach:** Use ads with product tags to expand the reach and drive engagement of your shoppable content and products.

- **Re-Engage Shoppers:** Re-engage people that have shown interest in your products by using Shopping Engagement Custom Audiences to pull them back into the shopping journey.

- **Find New Shoppers:** Find net-new shoppers who are similar to your existing shoppers by using Shopping Lookalike Audiences.

Setup Shopping Ads

Shopping on Instagram provides a seamless customer checkout experience for anyone who discovers your products in their Instagram feed. Follow the links below to learn how:

1. Introduction to how to advertise on Instagram

2. How Instagram advertising works

3. Types of Instagram ads

4. Instagram ad campaign objectives

5. Targeting options when advertising on Instagram

6. How to create your first Instagram ad

Customer Audiences

How to setup Shopping Engagement Custom Audiences

These are segments of shoppers who have taken certain actions, like tapped on a product tag to view a specific product. Businesses can re-engage these high- intent shoppers with any type of ad.
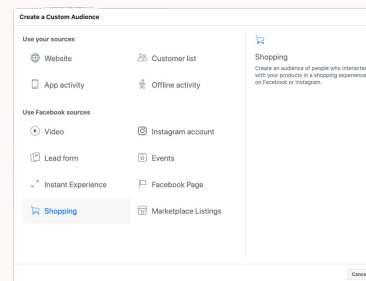
Step 1

If you have already run Shopping ads, you will have the option to create a new Custom Audience in Ads Manager.
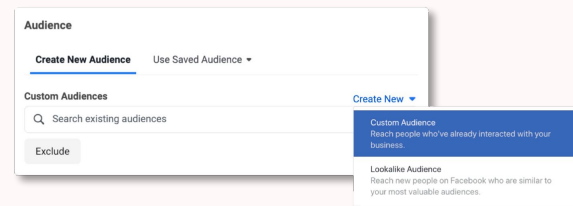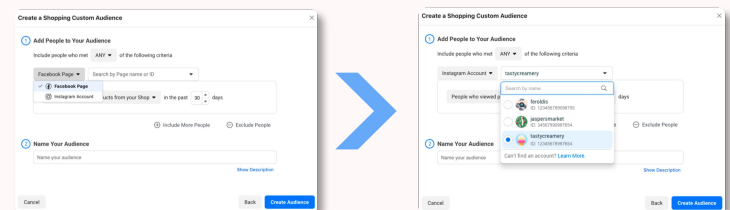

Step 2

Select "Shopping" to create Custom Shopping Audiences.

Step 3

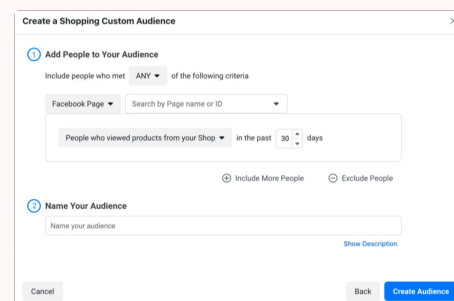Select your source (Facebook Page or Instagram Account) and account.

Step 4

Select people to include based on shopping criteria:
1. People who viewed products from your shop.
2. People who took have taken certain actions.
3. Add more criteria as desired.

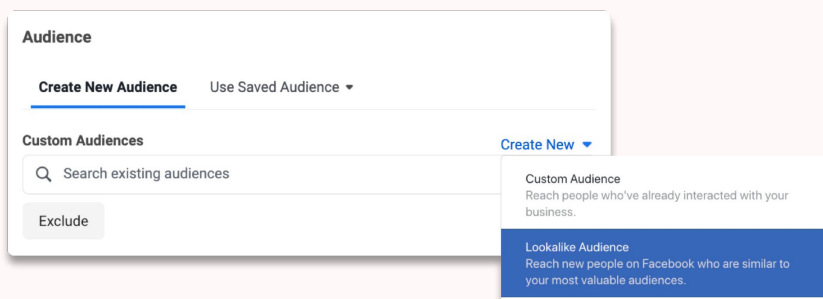You can include more than one source if you select "Include More People". Learn more.

Customer Audiences

These are shoppers that have similar interests to your existing shoppers. Businesses can use ads to find and engage these potential new customers.
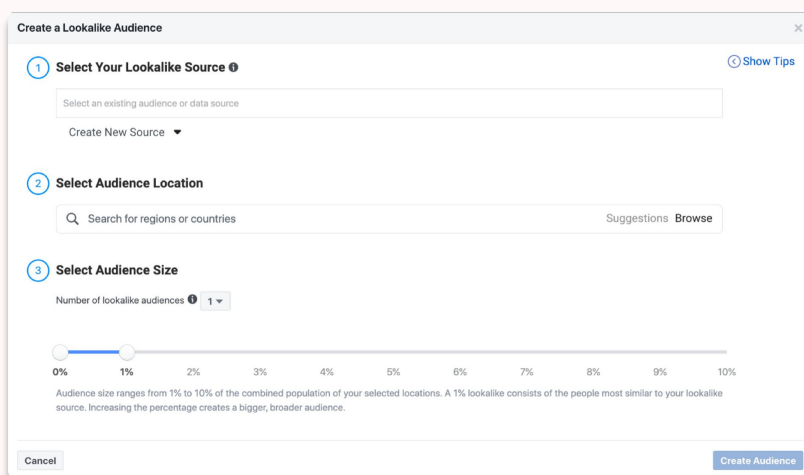
Step 1

In addition to a Custom Shopping Audience, you'll be able to create a new Lookalike Audience in Ads Manager.

Step 2

Select a Custom Shopping Audience based on people who purchased any products. Custom Shopping Audiences based on other shopping events (e.g., "View Product" and "Add To Cart") are not eligible for creating Lookalike Audiences.

Step 3
Select Audience Location.

Step 4
Select Audience Size.

Step 5
Select "Create Audience".

Learn more

Additional resources to help you develop shoppable media that grows sales.

Resources

Facebook channel on Shopify
You can use the Facebook channel to sync your products to a catalog on Facebook and Instagram, so that you can sell on Facebook Shop and Instagram Shopping. You can also use the Facebook channel to create marketing activities directly from Shopify.

Setting up Checkout on Instagram and Facebook
Learn about how to set up checkout on Instagram and Facebook in Shopify to drive higher conversion for your business and deliver a seamless buying experience for your buyers.

Learn more about data sharing settings in Shopify
Learn about setting up pixel and data sharing settings in Shopify with three different options, Standard, Enhanced, and Maximum to optimize the measurement of your ad campaigns.

Catalog Quality Best Practices
Learn about Product catalog quality standards. Quality catalog data makes it easier for customers to discover your products. When using the Facebook channel, your product details in Shopify will automatically sync to Facebook.

Creative Considerations for Direct Response Campaigns
Learn from Facebook studies what creative strategies help drive consumer action for performance advertisers on mobile.

Instagram Shopping Tips: Tagging Guide
In this guide, you will learn more about where and how your business can utilize product tags to get your products in front of people who love to shop on Instagram.

Open Your Shop on Instagram
Follow these steps for creating a shop on Instagram to get access to features like product tags.

Instagram Shopping: Your Complete Guide to Tagging Products on Instagram
In this guide, you will learn more about where and how your business can utilize product tags to get your products in front of people who love to shop on Instagram.