

FORAPOST PARTNER EDITION

# The Small Business Social Media Playbook

Setup Guides for 14 Business Types

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by ForaPost

Share this with your network. Earn 20% on every referral.

# For ForaPost Partners

You're holding the complete ForaPost playbook — the same guide we give every user who signs up. It covers 14 business types, step-by-step setup instructions, content strategy frameworks, and everything a small business owner needs to get their social media running with ForaPost.

We're sharing this with you so you can see exactly what your referrals experience. When you recommend ForaPost to your network, this is the product behind your recommendation — and every signup that comes through you earns you recurring revenue.

## The ForaPost Partner Program

Two tiers, both simple. Pick the one that fits how you work.

### Tier 1: Strategic Referrer — 20% Lifetime

You actively market ForaPost to your audience. You create content, run campaigns, write about us, or integrate ForaPost into your existing services. The marketing effort is yours — and because you're investing in promoting the product, you earn **20% of every referred account's subscription for as long as they remain a customer**. No cap, no sunset.

- You handle your own marketing and promotion for ForaPost
- 20% recurring commission — lifetime of the referred account
- Monthly payouts, \$50 minimum threshold
- Unique referral tracking code + watermarked posts carry your attribution
- Best for: agencies, consultants, influencers, and professionals who already create content for their audience

### Tier 2: Community Referrer — 20% for 12 Months

You share ForaPost with your existing network — a newsletter blast, a social post, a mention in your community. No ongoing advertising costs or promotional effort required. You're leveraging the audience you've already built, and you earn **20% of every referred account's subscription for 12 months**.

- Share with your existing audience — no advertising spend or ongoing campaigns
- 20% recurring commission — 12 months per referred account
- Monthly payouts, \$50 minimum threshold
- Unique referral tracking code
- Best for: community leaders, newsletter operators, group admins, and professionals with an established network

## How It Works

- Apply at [forapost.online/become-a-partner](https://forapost.online/become-a-partner)
- We review your application within 48 hours
- You receive a unique referral code and tracking link
- Every account that signs up through your link earns you commission
- Agency referrals earn commission on the full agency plan (all seats)

The rest of this playbook is the complete product guide. Read it, share it, reference it when your network asks what ForaPost does. Every chapter is a potential conversation with a business owner who needs exactly this.



# How to Use This Guide

This guide is organized by business type. You don't need to read the whole thing.

**Find your chapter.** Each chapter covers a specific type of business — restaurants, real estate, fitness, beauty, and so on. Jump to the one that matches yours.

**Follow the steps.** Every chapter walks you through exactly what to upload, which features to use first, how to set up your content strategy, and what your AI Manager will create from your content.

**Use the back matter for reference.** The Feature Reference at the end explains every ForaPost feature in one place. The Pricing table helps you choose the right plan. The FAQ answers the questions we hear most.

If your business spans multiple categories — say you're a wellness coach who also sells courses — read both chapters. The advice stacks.

# What Is ForaPost?

ForaPost is an AI-powered social media manager for small businesses. You upload your brand materials — documents, photos, videos, product catalogs — and your AI Manager learns your voice, creates posts that sound like you, and publishes them across up to eight platforms on the schedule you set.

## How it works:

- **You share your brand.** Upload documents, images, and videos that represent your business.
- **Your AI Manager learns your voice.** It studies your materials to understand your tone, style, and messaging.
- **Content is created daily.** Your AI Manager writes platform-specific posts tailored to your brand.
- **Posts are published on schedule.** Content goes live at the times you choose, across all your connected platforms.

**Supported platforms:** Instagram, Facebook, Twitter/X, LinkedIn, TikTok, YouTube (Shorts), Threads, and Bluesky.

## What your AI Manager does:

- Writes original posts for each platform
- Creates images and videos to accompany posts
- Adapts content for each platform's format (character limits, hashtag conventions, media requirements)
- Schedules and publishes at the times you set
- Features your products if you connect an e-commerce store
- Ties content to calendar events (holidays, sales, launches)

## What it doesn't do:

- Reply to comments or DMs
- Follow or unfollow accounts
- Access your personal messages
- Change your account settings

ForaPost is built for business owners who want a consistent social media presence without spending hours writing posts. Your AI Manager handles the daily work. You stay focused on your business.

# Quick Start: Three Things Every User Does First

No matter what kind of business you run, your first three steps are the same.

## 1. Upload Your Collateral

Collateral is anything that represents your brand — documents, photos, videos, brochures, pitch decks, product descriptions. The more you provide, the better your AI Manager understands your voice.

Go to the Collateral section in your dashboard and upload your files. Supported formats include PDF, DOCX, PPTX, images (JPG, PNG, WEBP), and video (MP4, MOV).

You can also connect Google Drive or Dropbox to import files directly, or enter website URLs for ForaPost to analyze.

## 2. Connect Your Platforms

Go to Accounts and connect the social media platforms where you want to publish. Each platform uses OAuth — you'll authorize ForaPost to post on your behalf.

Your plan determines how many platforms you can connect:

Plan	Platforms	Price
Free	1	\$0/mo
Pro	3	\$29/mo
Panorama	6	\$59/mo
Scale	8 (all)	\$99/mo

## 3. Review Your First Posts

After onboarding, your AI Manager creates sample posts for your review. Rate each one with a thumbs up or thumbs down — this calibrates the voice. Then enable the Approval Queue so you can review posts before they go live.

Most businesses transition to fully autonomous publishing within a few weeks, once confidence in the voice is established.

That's it. Upload your materials, connect your platforms, review your first posts. Your AI Manager takes it from there.

# Chapter 1: ForaPost for Restaurants & Food Service

## Why Social Media Matters for Restaurants & Food Service

Social media is where people decide where to eat. Not just tourists checking reviews — your neighbors, your regulars-to-be, the couple debating between your place and the one down the block. They check your Instagram before they check your menu. If your feed is empty or hasn't been updated in two weeks, they wonder if you're still open.

The restaurants winning on social media aren't spending thousands on photographers or ad budgets. They're posting consistently — real food, real people, real moments from the dining room and the kitchen. A phone photo of tonight's special taken in good light, posted at 2 PM when people are deciding on dinner, outperforms a professionally styled shot posted whenever you find the time.

This applies whether you run a full-service restaurant, a food truck, a coffee shop, a bakery, a juice bar, a catering company, a meal prep service, a bar or brewery, or an ice cream shop. The specifics vary, but the principle holds: the business that shows up consistently in people's feeds is the one they think of when they're hungry.

## What to Upload

### For restaurants and cafes:

- Menu items with photos and what makes each dish special
- Team member photos and bios (the chef, the servers, the bartender)
- Kitchen and dining room photos showing the atmosphere
- Customer reviews and testimonials
- Event information (live music, wine dinners, holiday hours)
- Sourcing stories (your farm partnerships, your roaster, your fishmonger)

### For food trucks:

- Every menu item with a photo and price
- Your regular locations and route schedule
- Behind-the-scenes prep footage
- Photos of your truck at different spots

### For coffee shops:

- Each menu item with a photo and one sentence about what makes it worth ordering
- Barista profiles with their story and signature drink
- The shop atmosphere — morning light, community moments
- Roast information and sourcing relationships

### For bakeries:

- Every product from multiple angles (sourdough, croissants, celebration cakes)
- Seasonal and limited-availability items with dates
- Process photos (proofing, laminating, decorating)

### For bars and breweries:

- Event details (trivia, live music, tap takeovers) with atmosphere photos, not flyers

- Tap releases and seasonal offerings
- Real photos from busy nights — the patio full, the crowd mid-laugh

#### **For catering companies:**

- Event galleries with multiple photos (setup, full spread, detail shots, guest energy)
- Team member profiles (logistics coordinator, head of operations)
- Corporate capabilities documents and case studies
- Both B2B and B2C content

#### **For meal prep services:**

- Weekly menus with portioned meal photos and macro breakdowns
- Ingredient sourcing information and nutrition guides
- Before/after fridge restock photos

#### **For juice bars:**

- Key ingredients with health benefits and which drinks contain them
- Real ingredient and prep photos
- Educational content about wellness ingredients

## **Which Feature to Start With**

**Catalog Maker** is your starting point.

Open Catalog Maker and create one record for every item, person, or event you want featured in your social media. Each record needs a photo and a description.

**For a restaurant:** Create a record for each signature dish. Attach a photo (phone is fine — window light, clean surface). Write one specific sentence: "House-made chilaquiles, served weekends on our patio in the Arts District." Enter the price. Your AI Manager uses these records to create daily posts with the specificity that drives foot traffic.

**For a food truck:** Create records for each location on your route. Attach a photo of your truck at that spot. Check "Treat as Event" and set the date. Your AI Manager publishes location posts on the right days so followers always know where to find you.

**For a coffee shop:** Create a record for each menu item. Write what makes it special ("18-hour cold proof, gone by 10am"). Create records for your baristas — their photo, how long they've been with you, their signature drink. Tag your records with descriptive labels so your AI Manager varies the content tone — product-tagged records get appetizing, sales-focused language; event-tagged records get urgency-driven language.

**For a bakery:** Create records for each product and check "Treat as Event" for seasonal or limited items. Set the date or recurring schedule. Your AI Manager publishes teasers in advance and availability posts on the right day. "Fridays only, 24 per batch" creates the urgency that turns casual followers into regulars.

**For a bar or brewery:** Create records for every event — trivia, live music, tap releases. Write descriptions that capture the vibe, not just logistics ("Your team redeems itself from last week's catastrophic geography round. 7pm."). Check "Treat as Event" and set dates. Your AI Manager publishes event announcements at least 48 hours in advance.

**For a catering company:** Create records for each event you cater. Use Multi-Select Media to attach multiple photos — setup, full spread, close-up details, the full table. Tag records to vary your content tone — B2B records get professional, capability-focused language while B2C records get warm, celebratory language.

## **Set Up Your Content Strategy**

After onboarding, your AI Manager sets up your brand profile automatically. Here's what to review and adjust.

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: menu highlights, kitchen behind-the-scenes, team stories, customer experiences, sourcing stories, seasonal specials, community connection, food education
- Goals weighting: Awareness 35%, Engagement 30%, Leadership 10%, Other 25%
- Tone weighting: Casual 40%, Direct 25%, Playful 20%, Inspirational 15%
- Approach: Relatable 40%, Engaged 30%, Consultative 15%, Aggressive 15%

**Set your Journey Distribution.** Adjust the funnel weighting:

- **Awareness: 35%** — menu spotlights, dish features, kitchen behind-the-scenes. People discovering you for the first time need to see what you serve and what makes it special.
- **Interest: 30%** — sourcing stories, team features, food education. Builds the connection that turns a first-time visitor into a repeat customer.
- **Consideration: 20%** — customer reviews paired with dish photos, UGC highlights, event announcements. Social proof and reasons to visit this week.
- **Conversion: 15%** — today's special with urgency ("limited portions"), booking prompts, seasonal pre-order deadlines, event tickets.
- **Loyalty: 0%** — keep at zero initially; raise to 5–10% once you have a repeat customer base to celebrate.

Or select the "balanced" preset and adjust from there. For food trucks, shift to Awareness 40%, Conversion 25% (location posts ARE conversion posts). For bars/breweries, shift Conversion to 30% (events are your conversion engine).

**Add Calendar Events:**

- Valentine's Day (Feb 14) — prix fixe, couples specials, reservation push
- Mother's Day / Father's Day (May/June) — brunch specials
- Patio Season Opening (your date)
- Local Food Festivals — your city's food truck rallies, restaurant weeks, food crawls
- National Food Days relevant to your menu (National Coffee Day Sep 29, National Pizza Day Feb 9, National Taco Day Oct 4)
- Thanksgiving — pre-order deadlines, holiday hours, catering availability
- Holiday Season — gift cards, catering, NYE reservations, holiday hours
- Seasonal Menu Launches — spring/summer and fall/winter transitions
- Weekly Recurring (bars/breweries): trivia, live music, tap takeover — check "Treat as Event" with recurring dates

**Add AI Instructions:**

- "Always include specific, appetizing details about dishes — describe what's in it and what makes it worth ordering, not generic 'try our food' language."
- "Include the neighborhood or area name when mentioning our location."
- "Feature team members by name at least once per week."
- For food trucks: "Every post during service days must include today's location and hours."
- For bars/breweries: "Describe event atmosphere and feeling, not just logistics."
- For catering: "Balance B2B content (logistics, scale, reliability) with B2C content (food beauty, celebration energy)."

## What a Typical Week Looks Like

Here's what a typical week of posts looks like for a restaurant on the Pro plan (2 posts/day, 3 platforms):

- **Monday: Instagram — Menu spotlight:** "House-made chilaquiles — roasted tomatillo salsa, two eggs, crema, cilantro. Served weekends on our patio in the Arts District. \$14."
- **Tuesday: Facebook — Behind-the-scenes:** Photo of the morning delivery arriving with a sentence about your sourcing relationship.
- **Wednesday: Instagram — Customer review + dish photo:** Screenshot of a Google review paired with a photo of the dish they mentioned.
- **Thursday: Instagram — Team feature:** "Meet Carlos — he's been behind our bar for three years and makes the best old fashioned in Midtown."
- **Friday: Facebook + Instagram — Today's special:** Posted at 2pm — "Tonight's special: pan-seared halibut with spring peas and brown butter. Limited portions."
- **Saturday: Instagram — Atmosphere:** Real photo of a full patio or busy dining room on a Saturday night.
- **Sunday: Facebook — Sourcing story:** "We've been working with Riverside Farms for two years. Here's why their heirloom tomatoes taste different."

For food trucks, daily location posts go out before 10 AM. For bakeries, seasonal availability and pre-order deadlines. For meal prep services, a Sunday evening menu reveal. Your AI Manager matches the rhythm to your business.

## Pro Tips

- **Set media to "Uploaded Only."** Go to Settings → Media → Select "Uploaded Only." Your real food photography outperforms AI-created images every time. Customers want to see what they'll actually get.
- **Include your neighborhood name in every Catalog Maker record.** Google now indexes public Instagram posts. A post naming your dish, your neighborhood, and your style is searchable on Google — not just Instagram.
- **Use Calendar Events for holidays and seasonal transitions.** Add Valentine's Day, patio season opening, Thanksgiving, and local food festivals. Your AI Manager creates seasonally aware content without you making new catalog records for each one.
- **Tag your records with descriptive labels.** Your AI Manager uses tags to vary the tone of each post. Product-tagged records get appetizing, sales-focused language. Event-tagged records get urgency-driven language. Use tags like "product" for dishes, "event" for recurring events, and "custom" for team and sourcing stories.

## Recommended Plan

- **One platform (Instagram or Facebook):** Free plan works to start
- **Instagram + Facebook + one more:** Pro (\$29/mo) — covers the core platforms most restaurants need
- **Adding TikTok or YouTube:** Pro (\$29/mo) minimum — video platforms require Pro or above
- **4+ platforms with per-platform posting controls:** Panorama (\$59/mo) — set different posting frequencies for each platform

Most restaurants start on Pro and find it covers their needs. If you're a catering company posting B2B content on LinkedIn alongside B2C on Instagram and Facebook, Panorama gives you the platform-specific controls to optimize each channel.

# Chapter 2: ForaPost for Real Estate

## Why Social Media Matters for Real Estate

There are more licensed real estate agents than homes being sold. Your brokerage is a credential. Your social media presence is why someone calls you specifically.

The highest-converting real estate content isn't a listing photo — it's a neighborhood tour. People aren't buying a house; they're buying a life in a place. The agent who demonstrates ground-level neighborhood knowledge builds the trust that a property walkthrough never can.

When a homeowner starts thinking about selling, the first thing they do is look at local market data. The agent who shows up in their feed every week with neighborhood-specific stats — median sale price, days on market, list-to-sale ratio — is the one who wins the listing conversation. Data posts are listing magnets.

And it compounds. Posting consistently 3–5 times per week builds algorithmic presence on Instagram and Facebook. A neighbor who eats at your recommended restaurant because you featured it on Instagram eventually lists with you because you're the agent who clearly knows the area.

## What to Upload

- **Listings with narrative descriptions** — not specs, but the life the home enables ("The kitchen window faces east — your coffee gets morning light, and the park is a three-minute walk")
- **Neighborhood knowledge** — area guides, school information, walkability notes, hidden gems, honest assessments of each neighborhood you serve
- **Market data** — MLS summaries, neighborhood-level statistics, market analysis templates (upload fresh data weekly)
- **Buyer education materials** — first-time buyer guides, process explainers, cost breakdowns, common misconceptions
- **Client testimonials** (with permission) — closing day photos, client stories, review screenshots
- **Your professional background** — your bio, your approach, what makes you different from the 50 other agents in the area
- **Neighborhood photos** — the coffee shop, the park, the school, the morning light on a residential street. Your own photos of real places, not stock imagery

## Which Feature to Start With

**Catalog Maker** for listings and neighborhoods. **Collateral Upload** for market knowledge and education.

**For listings:** Open Catalog Maker → Create a record for each listing → Write the story, not the spec sheet. "3BR/2BA, 1,800 sqft, updated kitchen" is Zillow copy. "The kitchen window faces east — your coffee gets morning light" is a reason to schedule a showing. Attach photos and enter the listing URL as the external link.

**For neighborhoods:** Create records for each neighborhood you serve. Attach your photos: the local coffee shop, the park, the school, the character of the street. Tag each record with a descriptive label. Your AI Manager uses these tags to vary the tone of each post — neighborhood records get community-focused language, listing records get property-focused language.

**For market data:** Upload your MLS data summaries and market analysis to Collateral each week. Your AI Manager creates weekly market data posts — one clear number, one trend, one implication — across Instagram, Facebook, LinkedIn, and other connected platforms.

**For buyer education:** Upload your first-time buyer guides, process explainers, and cost breakdowns to Collateral. Your AI Manager creates educational carousel-style posts that get saved and shared — building trust with buyers months before they're ready to start looking.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: neighborhood expertise, market data analysis, listing showcases, first-time buyer education, client success stories, community lifestyle, real estate process demystification
- Goals weighting: Leadership 35%, Awareness 30%, Engagement 25%, Other 10%
- Tone weighting: Authoritative 35%, Direct 25%, Casual 20%, Inspirational 20%
- Approach: Consultative 35%, Authoritative 30%, Relatable 25%, Engaged 10%

### Set your Journey Distribution:

- **Awareness: 30%** — listing showcases, neighborhood features, community content. Being seen and recognized by future buyers and sellers.
- **Interest: 25%** — market data posts, neighborhood tours, community lifestyle content. Building the expertise reputation that earns listing appointments.
- **Consideration: 25%** — first-time buyer education, process explainers, client success stories. Proving you're the right agent to hire.
- **Conversion: 15%** — open house announcements, "DM for a free CMA" CTAs, booking calls.
- **Loyalty: 5%** — client anniversary posts, homeowner tips for past clients. Creates referrals from your existing network.

Or select the "brand\_awareness" preset and adjust Consideration up to 25%.

### Add Calendar Events:

- Spring Market Surge (Apr–Jun) — "Spring Market Update" recurring weekly
- Back-to-School Move Timing (Jul–Aug) — family-focused content
- Fall Market (Sep–Nov) — "Is now the time to sell?" content
- Year-End Review (Dec) — annual market summary and predictions
- Open House Dates — each as a Calendar Event with lead-up announcements
- Local Community Events — farmers markets, festivals, grand openings in your farm area
- Interest Rate Decision Dates — Federal Reserve meeting dates for timely market commentary

### Add AI Instructions:

- "Always reference specific neighborhoods by name, not generic 'the area' or 'locally.'"
- "Market data posts should include one clear number, one trend, and one implication for buyers or sellers."
- "Post as the agent (personal brand), not as the brokerage. Use first person."
- "Never post listing-only content without surrounding it with neighborhood, market, or education content."
- "For LinkedIn: write professional market intelligence. For Instagram: write visual neighborhood content."

## What a Typical Week Looks Like

A typical week for a real estate agent on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram + LinkedIn — Market data:** "Homes in Westlake sold in a median 12 days last month. That's 8 days faster than the county average. Here's what that means if you're thinking about listing."

- **Tuesday: Instagram — Neighborhood feature:** Your own photo of the coffee shop in Maple Ridge with a caption about why you recommend it.
- **Wednesday: Facebook — Community content:** Local farmers market, a new restaurant opening, a community event. No selling — just showing you know the area.
- **Thursday: Instagram — Listing showcase:** Story-driven copy with the listing link. "The backyard oak tree is older than the neighborhood."
- **Friday: LinkedIn — Client story:** "Helped a family relocate from Chicago to Austin in two weekends. Here's what they told me mattered most." (with permission)
- **Saturday: Instagram — Education carousel:** "The 5 costs first-time buyers don't budget for" — save-worthy, shareable content.

On LinkedIn, your AI Manager creates professional market intelligence and thought leadership. On Instagram and Facebook, it creates visual neighborhood and listing content. On Threads and Bluesky, it creates market takes and opinions that match those platforms' conversational style.

## Pro Tips

- **Post as yourself first, your brokerage second.** Your face, your voice, your neighborhood expertise. People follow people, not logos.
- **Use "Uploaded Only" for media.** Your real neighborhood photos prove you know the area. Stock photos of generic houses signal that you don't.
- **Bluesky is an empty room full of your ideal audience.** Educated, financially curious professionals making life decisions. Your competitors aren't there. Post market intelligence and honest takes.
- **Tag your records with descriptive labels.** Your AI Manager uses tags to vary content tone — listing records get property-focused language, neighborhood records get community-focused language.

## Recommended Plan

- **One platform (Instagram or Facebook):** Free plan to start
- **Instagram + Facebook + LinkedIn:** Pro (\$29/mo) — the core three for most agents
- **Adding TikTok for neighborhood tours:** Pro (\$29/mo) minimum
- **4+ platforms with per-platform controls:** Panorama (\$59/mo)
- **All 8 platforms, maximum reach:** Scale (\$99/mo)

Most agents start on Pro with Instagram, Facebook, and LinkedIn. If you're serious about TikTok neighborhood tours and want per-platform posting frequency control, Panorama is the right fit.

# Chapter 3: ForaPost for Health & Wellness

## Why Social Media Matters for Health & Wellness

Health and wellness practitioners — chiropractors, naturopaths, acupuncturists, physical therapists, therapists, dietitians, supplement practitioners, and wellness coaches — share a common challenge: your expertise lives on your website while your patients live on Instagram. Social media bridges that gap.

The practices that fill their schedules aren't the ones with the biggest ad budgets. They're the ones posting consistently three or more times per week with content that builds trust before the patient ever picks up the phone. Education-first content — explaining conditions, addressing first-visit anxiety, demonstrating methodology — earns trust in a way that promotional content never can.

For chiropractors, the viral adjustment video gets entertainment viewers, not patients. Practices posting 3x/week for six months dramatically outperform those that go viral once and disappear. For therapists, consistent posts about your specific approach (anxiety in working professionals, for example) build the niche authority that fills a caseload. For supplement practitioners, protocol posts that answer "what should I do?" convert better than product posts that answer "what should I buy?"

## What to Upload

### For chiropractors:

- First-visit anxiety content — what to expect, does it hurt, what conditions does chiropractic help
- Condition-specific education — disc herniation, desk-posture headaches, sciatica explainers
- Practitioner philosophy and team introductions

### For supplement and wellness practitioners:

- Clinical protocol PDFs, gut health protocols, supplement stacking guides
- Product images, descriptions, and purchase links (or connect your Shopify store)
- Existing website content, brochures, and research papers

### For therapists and counselors:

- Your practice philosophy and specialization descriptions
- Modality descriptions (never specific client cases, even anonymized)
- Destigmatization and process education content

### For physical therapists:

- Condition-specific education — injury explainers, exercise demonstrations, self-triage guides
- Direct access information (every US state now allows PT without a referral)

### For acupuncturists:

- Research citations and evidence for specific conditions (chronic pain, fertility, migraine)
- Mechanism explanations that address common skepticism

### For dietitians and nutritionists:

- Your nutrition philosophy and clinical frameworks
- Educational handouts, published articles, meal planning resources

## Which Feature to Start With

**Catalog Maker** with four record types is the framework that works across every health specialty.

Open Catalog Maker and create records in four categories. Tag each one with a descriptive label:

- **"person"** — Team members with personal stories and photos
- **"service"** — Treatments and services with patient-facing descriptions
- **"expertise"** (custom tag) — Clinical insights, condition-specific education, myth-busting content
- **"protocol"** (custom tag) — Treatment programs, wellness plans, care pathways

Your AI Manager uses these tags to vary the tone of each post. Person-tagged records get warm, personal language. Service-tagged records get informative, benefit-focused language. The human element (team), the service offering (treatments), the trust-builder (expertise), and the action-driver (protocols) work together to fill a schedule.

Also upload your clinical materials to Collateral. Your website content, brochures, research papers, and educational handouts. Your AI Manager creates daily posts from this material — drawing on your clinical knowledge to create content without you writing a single caption.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: condition-specific education, first-visit experience, team stories, patient success journeys, wellness tips, myth-busting, treatment explanations
- Goals weighting: Leadership 40%, Awareness 30%, Engagement 20%, Other 10%
- Tone weighting: Authoritative 35%, Casual 25%, Inspirational 20%, Direct 20%
- Approach: Consultative 40%, Authoritative 30%, Relatable 20%, Engaged 10%

### Set your Journey Distribution:

- **Awareness: 35%** — condition-specific education, wellness tips, myth-busting. Reaching people actively searching for answers to their health questions.
- **Interest: 30%** — treatment explanations, protocol descriptions, methodology content. Building understanding of your approach.
- **Consideration: 20%** — team introductions, first-visit explainers, patient success stories. Reducing anxiety and building trust before the first appointment.
- **Conversion: 10%** — booking prompts, new patient offers, seasonal specials. Keep low — trust drives healthcare decisions.
- **Loyalty: 5%** — patient appreciation, wellness community content.

Or select the "brand\_awareness" preset and adjust Interest up to 30%. For supplement practitioners with e-commerce, shift Conversion to 20%. For med spas, use the "balanced" preset.

### Add Calendar Events:

- National Health Observance Months: Heart Health (Feb), Mental Health Awareness (May), Breast Cancer Awareness (Oct), Dental Health (Feb)
- Seasonal Wellness: allergy season (spring), cold/flu prep (fall), holiday stress management (Nov–Dec), New Year health resolutions (Jan)
- Practice Milestones: anniversary dates, new practitioner joins, office expansion
- Community Health Events: local health fairs, charity runs, wellness expos

### Add AI Instructions — set these immediately:

- "Lead with education, not promotion. Teach first, offer services second."
- "Never make health claims that aren't supported by evidence."
- "Always include a gentle CTA — 'If you're experiencing [condition], we're here to help.'"

- For chiropractors: "Never make unverified claims about conditions chiropractic can treat."
- For therapists: "Never imply diagnoses. Never provide therapeutic advice. Never reference specific client cases, even anonymized."
- For med spas: "Never use 'permanent,' 'guaranteed,' 'risk-free,' or '100%.' Always include 'individual results may vary.'"
- For supplement practitioners: "Never make health claims or diagnoses. Avoid 'cure,' 'treat,' 'heal.'"

Also go to Settings → Words to Avoid and add: "cure," "treat" (for supplement/wellness), "permanent," "guaranteed," "risk-free," "miracle" (for med spas), plus any competitor names.

Enable the Approval Queue for the first several weeks — this is your compliance checkpoint.

## What a Typical Week Looks Like

A typical week for a chiropractic practice on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram — Condition education:** "3 reasons your low back pain isn't getting better — and what to do about each one."
- **Tuesday: Facebook — Team feature:** "Meet Dr. Sarah — she joined our practice two years ago specializing in sports injuries."
- **Wednesday: Instagram — First-visit explainer:** "What happens at your first chiropractic appointment — from paperwork to adjustment, here's exactly what to expect."
- **Thursday: Instagram + Facebook — Patient success story** (with consent): "After six months of consistent care, Maria went from daily headaches to headache-free."
- **Friday: Instagram — Wellness tip / myth-buster:** "Does cracking your knuckles cause arthritis? Here's what the research actually says."

For therapists, your AI Manager creates destigmatization content, process education, and philosophy posts — never anything that could be interpreted as therapeutic advice. For dietitians, it creates posts from your distinctive nutrition philosophy, not generic "eat more vegetables" content.

## Pro Tips

- **Set compliance guardrails immediately.** Go to AI Instructions and add rules for your specialty.
- **Use Words to Avoid for regulatory terms.** Go to Settings → Words to Avoid.
- **Connect your e-commerce store if you sell products.** Supplement practitioners with a Shopify store can connect it via E-commerce Integration.
- **Enable the Approval Queue for the first few weeks.** For regulated industries, the Approval Queue is your compliance checkpoint.

## Recommended Plan

- **One platform (Instagram or Facebook):** Free plan to start
- **Instagram + Facebook + one more:** Pro (\$29/mo)
- **Adding TikTok for educational videos:** Pro (\$29/mo) minimum
- **4+ platforms with per-platform controls:** Panorama (\$59/mo)

Most health practices do well on Pro with Instagram, Facebook, and one additional platform.

# Chapter 4: ForaPost for Fitness

## Why Social Media Matters for Fitness

Potential clients don't hire trainers because the trainer is impressive. They hire because they believe the trainer can get results for people like them. A photo of your client Sarah hitting her first pull-up at age 48 tells prospects you can coach. A video of you doing a perfect squat only tells them you can squat.

The trainers with full schedules aren't spending hours creating content. They've uploaded their expertise once, and their AI Manager creates content from it consistently. The system runs whether your schedule is full or slow.

For yoga studios, the studios growing fastest post community content, not flex content. Student testimonials, teacher spotlights, class previews, and wellness education outperform aesthetic pose photos. For gym owners, the 5 AM crowd video shows community and energy. An empty gym photo shows equipment. Prospective members choose gyms based on whether they see themselves in the community.

## What to Upload

### For personal trainers:

- Client results with specifics (with permission) — what they were dealing with, what you worked on, what changed
- Your training philosophy and programming approach
- Form breakdowns, common mistakes, correction cues
- Myth-busting content with evidence

### For yoga studios:

- Each class type with a description of who it's for and what to expect
- Teacher profiles — their philosophy, their personal story, what makes their class distinctive
- Community events and challenge details
- Wellness education content (breathwork, stress management, flexibility)

### For gym owners:

- Real photos and videos of your gym in action — the 5 AM crowd, coaching moments, community celebrations
- Member success stories (with permission)
- Equipment and facility highlights in context (being used, not empty)

## Which Feature to Start With

**Catalog Maker** with client win records for personal trainers. **Catalog Maker** with class and teacher records for yoga studios.

**For personal trainers:** Create records weighted toward client wins. Tag each with a descriptive label: "client-win" (with permission, each client's journey and specific results), "education" (methodology, form guidance, myth-busting), "personal" (your own training, your story). Your AI Manager uses tags to vary the tone — client-win records get inspiring, results-focused language while education records get informative, save-worthy language. Free workouts attract people who want free workouts. Client wins attract people who want to hire you.

**For yoga studios:** Create records for each class type, each teacher, and community events. Tag each with descriptive labels ("class," "teacher-spotlight," "community," "philosophy"). For challenges and workshops, check "Treat as Event" and set dates — your AI Manager publishes announcements 4 weeks out, reminders at 2 weeks and 1 week, and a final urgency post.

**For gym owners:** Go to Settings → Media → Select "Uploaded Only." Upload real photos of your gym during peak energy moments. Your AI Manager uses only your authentic gym-life imagery — the people ARE the content.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: client transformation stories, training methodology, form education, myth-busting, community celebrations, class/session previews
- Goals weighting: Engagement 35%, Awareness 30%, Leadership 25%, Other 10%
- Tone weighting: Inspirational 30%, Direct 30%, Casual 25%, Authoritative 15%
- Approach: Relatable 35%, Engaged 30%, Consultative 20%, Aggressive 15%

### Set your Journey Distribution:

For personal trainers:

- **Awareness: 25%** — form breakdowns, myth-busting, training philosophy.
- **Interest: 30%** — client win narratives, coaching-day moments, methodology.
- **Consideration: 25%** — specific client transformation stories (with permission).
- **Conversion: 20%** — availability posts with specific CTAs ("2 spots open starting April 1 for clients focused on strength after 40 — DM me 'ready'").
- **Loyalty: 0%** — raise once you have a community to celebrate.

For yoga studios: Awareness 30%, Interest 30%, Consideration 25%, Conversion 10%, Loyalty 5%. Lower conversion — yoga students join through community connection, not hard sells.

Or select the "balanced" preset and adjust.

### Add Calendar Events:

- New Year's Resolution Season (Jan) — highest sign-up period
- Spring Fitness Push (Mar–Apr) — outdoor training, spring challenges
- Summer Season (May–Jun) — schedule adjustments, outdoor classes
- Back-to-School (Sep) — fall programming
- Holiday Challenge Season (Nov–Dec) — accountability challenges
- For yoga studios: teacher trainings, retreats, workshops — all as Calendar Events with "Treat as Event"

### Add AI Instructions:

- "Post client results and wins, not my own workouts." (personal trainers)
- "Feature teachers by name. Students choose teachers, not studios." (yoga studios)
- "Never post empty gym photos — always show community and energy." (gym owners)
- "Always include a specific CTA when posting about availability."

## What a Typical Week Looks Like

A typical week for a personal trainer on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram — Client win:** "Sarah hit her first pull-up at 48. She started six months ago unable to hang from the bar for five seconds. Here's what we focused on and why it worked."
- **Tuesday: Instagram — Form breakdown:** "The most common deadlift mistake I see — and the cue that fixes it in one session. Save this."
- **Wednesday: Facebook — Coaching moment:** "A client told me today they climbed three flights of stairs without getting winded for the first time in years."
- **Thursday: Instagram — Myth-buster:** "Lifting heavy won't make you bulky. Here's what the research actually says."
- **Friday: Instagram + Facebook — Availability CTA:** "I have 2 spots opening in April for clients focused on building strength after 40. DM me 'ready' for details."

For yoga studios, teacher spotlights build the personal connections that drive class attendance. Challenge events create content arcs that keep the studio visible for weeks. For gym owners, community energy posts convert more trial memberships than any equipment showcase.

## Pro Tips

- **Post client wins, not your workouts.** The 80/15/5 content emphasis works: prioritize client results, then education, then your own training. Clients hire coaches who demonstrate they can help people like them.
- **Upload your methodology to Collateral.** Your training philosophy and educational frameworks give your AI Manager the depth to create content that sounds like a practitioner, not a generic fitness account.
- **For yoga studios, feature teachers consistently.** Students choose teachers, not studios.
- **Use "Treat as Event" for challenges and workshops.** Your AI Manager creates an automatic content sequence: announcement, midpoint check-in, celebration.

## Recommended Plan

- **One platform:** Free plan to start
- **Instagram + Facebook + LinkedIn (for corporate wellness):** Pro (\$29/mo)
- **Adding TikTok or YouTube:** Pro (\$29/mo) minimum
- **4+ platforms:** Panorama (\$59/mo)

Personal trainers typically start on Pro. Yoga studios benefit from Panorama for per-platform optimization.

# Chapter 5: ForaPost for Beauty & Salons

## Why Social Media Matters for Beauty & Salons

Beauty is the ultimate "visual IS the product" vertical. Before/after transformation posts remain the highest-performing content category — but the stylists and artists who share technical detail alongside the transformation receive significantly more service inquiries than those who just post the finished look.

Hair salons, barbershops, nail techs, tattoo artists, estheticians, massage therapists, and med spas all share a structural advantage: every client who sits in your chair walks out as content. The finish photo, the transformation reveal, the client reaction — your daily work IS your marketing. The businesses winning aren't hiring photographers. They've built a system for capturing their work consistently.

The stylists booked three weeks out aren't necessarily better — they're more visible. Staff content builds the personal connection that makes clients choose a specific stylist. And booth renters need this more than anyone: your personal following is the portable asset that survives a salon change.

## What to Upload

### For hair salons and stylists:

- Before/after transformation photos with technical detail (the formula, the process, why you made those choices)
- Stylist profiles — their specialty, their story, something personal
- Hair care education — maintenance tips, product recommendations, aftercare instructions
- Certifications and continuing education documentation

### For barbershops:

- Transformation videos with client reactions — the mirror reveal moment
- Barber personalities, shop culture, regular client stories

### For nail techs:

- Finish photos from every completed set, from multiple angles
- Trend references and style tags (chrome, gel extensions, seasonal designs)

### For tattoo artists:

- Your best pieces organized by style (fine-line, blackwork, neo-traditional, realism)
- Healed work photos (2–4 weeks after the session) — these prove longevity
- Flash sheet designs and booking availability

### For estheticians:

- Before/after skin transformations with standardized lighting and angles
- Treatment protocol details — what was done, how many sessions, what products were used
- Skincare education — ingredient breakdowns, myth-busting, routine guidance

### For massage therapists:

- Stretching guides and technique demonstrations
- Seasonal pain-point content — winter neck tension, summer sports injuries, desk-posture fixes

## Which Feature to Start With

**Catalog Maker with Before/After Photos** is the core feature for beauty businesses.

**For hair salons:** Open Catalog Maker → Create a record for each transformation (with client permission) → Use Before/After Photo to pair the starting point and the result → Write the technical detail: the formula, the technique, what the hair needed. Your AI Manager publishes these with the specificity that converts browsers into bookings.

**For barbershops:** Create records for each cut transformation with Before/After Photo. Also create records for your barbers' personalities and the shop atmosphere — tag each with descriptive labels so your AI Manager varies the tone appropriately.

**For nail techs:** Use Multi-Select Media to attach multiple angles of each finished set. Tag by style ("chrome," "gel extensions," "nail art," "seasonal"). Build a systematic finish-photo habit — photograph every completed set before the client leaves.

**For tattoo artists:** Tag each portfolio piece by style. Post healed work prominently (tag "healed-work") — it proves longevity. For flash sales, check "Treat as Event" and set dates. Your AI Manager publishes a countdown: tease, flash sheet reveal, booking open, and slots-filled update.

**For estheticians:** Use Before/After Photo with standardized lighting and angle. Write the treatment protocol in the description.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: transformations with process detail, stylist/artist stories, client celebrations, product education, service education, trend showcases, booking reminders
- Goals weighting: Awareness 35%, Engagement 30%, Leadership 20%, Other 15%
- Tone weighting: Casual 35%, Playful 25%, Direct 25%, Inspirational 15%
- Approach: Relatable 35%, Engaged 30%, Consultative 20%, Aggressive 15%

### Set your Journey Distribution:

- **Awareness: 35%** — transformation showcases, trend content, portfolio posts. Being discovered by new clients.
- **Interest: 25%** — stylist features, behind-the-scenes process, education content.
- **Consideration: 20%** — client testimonials, detailed before/after with technical explanation.
- **Conversion: 15%** — booking reminders, availability posts, seasonal promotions.
- **Loyalty: 5%** — client anniversary milestones, returning client appreciation.

Or select the "balanced" preset. For tattoo artists, shift Awareness to 40%, Conversion to 20% (portfolio reach is everything).

### Add Calendar Events:

- Engagement/Wedding Season (Jan–Mar) — bridal hair, wedding nails
- Prom Season (Apr–May) — updo specials, group bookings
- Summer Trends (Jun–Aug) — color trends, summer styles
- Back-to-School (Aug–Sep) — fresh cut season
- Holiday Party Season (Nov–Dec) — glam looks, gift cards
- Flash Sales (tattoo artists) — check "Treat as Event" for countdown sequences

### Add AI Instructions:

- "Always include technical detail with transformation posts — the formula, the process, what the hair/skin needed."

- "Feature stylists by name. Clients book people, not salons."
- "Before/after photos must use consistent lighting and angles."
- "For booth renters: all content should build the individual stylist's personal brand."
- For med spa/esthetician: "Never use 'permanent,' 'guaranteed,' 'risk-free.' Always include 'individual results may vary.'"

**Set Media to "Uploaded Only"** — go to Settings → Media → Select "Uploaded Only." This is non-negotiable for beauty businesses.

## What a Typical Week Looks Like

A typical week for a hair salon on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram — Booking reminder:** "New week, new look. We have 4 openings this week — balayage available Tuesday and Thursday. DM to book."
- **Tuesday: Instagram — Transformation:** Before/after carousel with technical detail. "Jessica came in wanting to go lighter for summer but her hair was previously box-dyed. We spent two sessions getting her there safely."
- **Wednesday: Instagram — Product spotlight:** "The one product we recommend to every color client — here's why it extends your color 3 extra weeks."
- **Thursday: Facebook — Team feature:** "Meet Anika — she's been with us for four years and specializes in textured hair."
- **Friday: Instagram — Client win:** "Maria finally got the platinum she's wanted for two years. Three sessions, zero damage."
- **Saturday: Instagram — Education:** "How to extend your blowout to day 3 — the products and techniques that actually work."

For tattoo artists, your AI Manager creates a steady stream of portfolio content with healed work prominently featured, plus flash sale countdown sequences. For estheticians, skincare education posts earn saves and shares.

## Pro Tips

- **Set media to "Uploaded Only"** — this is non-negotiable for beauty. Your real work is your only credible marketing.
- **Build a consent workflow into your service.** Ask at the moment of peak satisfaction. Most happy clients say yes.
- **For booth renters: build YOUR personal brand.** Your following is your portable asset.

## Recommended Plan

- **One platform (Instagram):** Free plan — Instagram is the primary portfolio platform for beauty
- **Instagram + Facebook + TikTok:** Pro (\$29/mo) — TikTok is particularly valuable for nail techs and barbershops
- **Adding YouTube:** Pro (\$29/mo) minimum
- **4+ platforms:** Panorama (\$59/mo)

Most beauty professionals start on Pro with Instagram, Facebook, and either TikTok or Threads.

# Chapter 6: ForaPost for E-Commerce

## Why Social Media Matters for E-Commerce

Reposting your Shopify product photos to Instagram isn't a social media strategy — it's a product catalog on the wrong platform. The product is only 20% of your social content. The other 80% is the lifestyle, education, brand story, and social proof that builds the trust and desire that actually drives checkouts.

For Shopify and WooCommerce sellers, social media is your owned distribution channel. For Etsy sellers, external traffic from social media boosts Etsy's search algorithm — every social media click to your listing tells Etsy your product has real-world demand, improving your organic search placement. For Amazon FBA sellers, TikTok-driven traffic boosts your organic Amazon ranking AND qualifies for Amazon's Brand Referral Bonus (~10% rebate on external traffic sales).

The compounding effect is real: social media drives direct sales AND improves your marketplace visibility, which drives additional organic sales from buyers who never saw your social content.

## What to Upload

**Connect your store first.** Go to Settings → E-commerce Integration → Connect your Shopify, Etsy, WooCommerce, or Amazon store. ForaPost pulls your product catalog — images, descriptions, prices, links — automatically. Every product becomes a postable record without manual entry.

Then upload supplementary materials to Collateral:

- Brand story and mission — why you started, what drives you
- Process documentation — how you make your products, where you source materials
- Lifestyle content — your product in context, the world it belongs in
- Customer testimonials and UGC (with permission)
- Keyword-optimized product descriptions

### For handmade and artisan sellers:

- Process photos and videos — your hands at work, sketching, crafting, packaging
- Material sourcing stories

### For subscription box brands:

- Monthly box contents with individual item details
- Unboxing preview content

## Which Feature to Start With

**E-commerce Integration** is your starting point — connect your store and your product catalog becomes your content library automatically.

**For Shopify sellers:** Connect your store. Your AI Manager pulls your entire product catalog and creates daily posts across all connected platforms.

**For Etsy sellers:** Connect your store. Your AI Manager creates posts using the same keyword-rich descriptions from your Etsy SEO — reinforcing your Etsy search ranking.

**For product launches:** Open Catalog Maker → Create records for each launch phase → Check "Treat as Event" → Set dates across a launch sequence: Day -14 (problem tease), Day -7 (solution hint), Day -3 (product reveal), Day 0 (launch), Day +3 (restock urgency).

**For content beyond products:** Use Catalog Maker to create records for your brand story, sourcing trips, and customer features. Tag records with descriptive labels — your AI Manager uses tags to vary the tone of each post. Product-tagged records get sales-focused language, while custom-tagged brand story records get narrative, connection-focused language.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: product lifestyle context, making/creation process, brand origin story, customer stories, product education, behind-the-scenes, launch announcements
- Goals weighting: Awareness 30%, Engagement 25%, Leadership 15%, Other 30%
- Tone weighting: Casual 30%, Playful 25%, Direct 25%, Inspirational 20%
- Approach: Relatable 35%, Engaged 25%, Consultative 20%, Aggressive 20%

**Set your Journey Distribution:**

- **Awareness: 25%** — lifestyle content, brand story. Being discovered.
- **Interest: 30%** — product education, making process, behind-the-scenes. Building desire.
- **Consideration: 25%** — customer reviews, UGC highlights, product demos. Social proof.
- **Conversion: 20%** — product features with links, launch announcements, seasonal promotions.
- **Loyalty: 0%** — raise to 5–10% once you have repeat customers.

Or select the "balanced" preset and adjust Conversion up to 20%. For product launches, temporarily switch to the "product\_launch" preset. For clearance, use the "clearance" preset.

**Add Calendar Events:**

- Valentine's Day (Feb 14) — gift guide, themed collections, last-ship-date reminders
- Mother's Day / Father's Day (May/Jun) — gift guide content
- Q4 Timeline: "Gift Guide Season" (Oct), Black Friday/Cyber Monday (Nov), "Last Shipping Date" (Dec)
- Product/Collection Drop Dates — each as Calendar Event with launch sequence
- Shop Anniversary — annual celebration content

**Add AI Instructions:**

- "Product content is only 20% of posts. The other 80% is lifestyle, education, brand story, and social proof."
- "For handmade products: show the making process. Hands at work, raw materials, craftsmanship."
- "Use the same keyword-rich language from our product listings in social content."
- "Always show products in context — being used, in real settings, solving real problems."

## What a Typical Week Looks Like

A typical week for a Shopify seller on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram — Product + lifestyle:** Your product in use, solving a real problem. "Monday morning coffee tastes different in a mug someone made by hand."
- **Tuesday: Instagram — Education:** Care tips, ingredient story, how to use the product best.
- **Wednesday: TikTok + Instagram — Brand story:** Why you started, a sourcing moment, the team behind the product.
- **Thursday: Instagram — Customer highlight:** Real person using your product (with permission).
- **Friday: TikTok — Product demo:** 60-second problem-solution-reaction video.
- **Saturday: Instagram Stories — Behind-the-scenes:** Packaging orders, prepping a new batch.

For Etsy sellers, your AI Manager creates collection countdown sequences. For Amazon FBA sellers, launch sequences drive the external traffic spikes that boost your Amazon organic ranking.

## Pro Tips

- **For handmade sellers, show your hands at work.** Process content outsells product photos because it shows the craft that justifies a premium price.
- **Plan holiday content starting September, not November.** Add the full Q4 timeline to Calendar Events.
- **Use the same keywords everywhere.** Your Etsy SEO terms and your social content should use the same language.

## Recommended Plan

- **One platform (Instagram):** Free plan to start
- **Instagram + Facebook + TikTok:** Pro (\$29/mo)
- **4+ platforms:** Panorama (\$59/mo)
- **All platforms:** Scale (\$99/mo)

E-commerce sellers benefit most from Pro with TikTok access — the "problem-solution-reaction" product demo video is the highest-converting e-commerce content format.

# Chapter 7: ForaPost for Coaches, Consultants & Speakers

## Why Social Media Matters for Coaches, Consultants & Speakers

Only 7.1% of LinkedIn's one billion users post regularly. If you post twice a week with a point of view, you're in the top fraction of visible professionals. Your competitors aren't beating you with better content — most aren't posting either.

The coaching space on Instagram is saturated with identical-looking content — sunset photos with overlaid quotes, "5 tips to transform your life" carousels, vague inspirational captions. The coaches who actually book clients post content specific to their methodology. The distinction isn't in being a coach — it's in having a distinctive approach and making it visible.

For consultants and executives, your LinkedIn presence is costing you business every week you stay silent. For keynote speakers, stage clips are only 20% of a speaking pipeline — the other 80% is thought leadership content that makes event planners think "I need this person at our conference."

## What to Upload

- Your methodology and frameworks — the specific approaches that differentiate you
- Case studies and client results (anonymized or with permission)
- Professional background — expertise, positioning documents, thought leadership
- Speaking topics and frameworks — talk outlines, post-event reflections
- Core beliefs and philosophy — the perspectives that make your content unmistakably yours

## Which Feature to Start With

**Collateral Upload** is the primary feature for this vertical — you already have a mountain of expertise. Upload it.

Upload your methodology documents, client frameworks, case studies, and professional insights to Collateral. Your AI Manager creates posts from YOUR specific approach — not generic "mindset" or "growth" content.

**For LinkedIn thought leadership:** Your AI Manager follows a three-post weekly rhythm:

- **Monday: Take** — your industry opinion, prediction, or disagreement with conventional wisdom
- **Wednesday: Story** — a client situation, a decision you made, a lesson from failure
- **Friday: Proof** — a result, a framework, or a case study your audience can use

Create Catalog Maker records and tag each with descriptive labels ("take," "story," "proof") to help your AI Manager vary the tone accordingly.

**For executives concerned about AI ghostwriting:** Go to AI Instructions → Add rules: "Always write from my perspective using first person. Reference my actual experience. Never use generic business platitudes."

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: industry insights, client case studies, methodology frameworks, professional philosophy, practical tools
- Goals weighting: Leadership 50%, Awareness 25%, Engagement 20%, Other 5%
- Tone weighting: Authoritative 35%, Direct 30%, Casual 20%, Inspirational 15%

- Approach: Consultative 35%, Authoritative 35%, Relatable 20%, Engaged 10%

### Set your Journey Distribution:

- **Awareness: 25%** — industry commentary, counterintuitive insights, framework shares.
- **Interest: 35%** — client stories, methodology deep-dives, behind-the-scenes of your process.
- **Consideration: 25%** — case studies, specific results, practical frameworks.
- **Conversion: 15%** — speaking availability, coaching openings, course enrollment, "DM me" CTAs.
- **Loyalty: 0%** — raise once you have a community or alumni network.

Or select the "brand\_awareness" preset and adjust Interest up to 35%.

### Add Calendar Events:

- Industry Conference Season — speaking dates, post-event content
- Fiscal Year Planning Periods — Q4 planning (Oct–Nov), Q1 planning (Dec–Jan)
- Course Launch Windows — 30-day launch sequences as Calendar Events
- Annual Review/Predictions (Dec/Jan) — year-in-review content

### Add AI Instructions:

- "Always write from my perspective using first person. Reference my actual experience."
- "Never use generic business platitudes or motivational quotes. Be specific to my methodology."
- "LinkedIn posts should follow the Take/Story/Proof rhythm."
- "Stage clips are portfolio, not pipeline. Between speaking events, focus on thought leadership."

## What a Typical Week Looks Like

A typical week for a consultant on Pro (2 posts/day, 3 platforms):

- **Monday: LinkedIn — The Take:** "Most consultants approach [common problem] by doing X. After 15 years, I've found the real issue is Y."
- **Tuesday: Instagram — Behind-the-scenes:** A moment from your day — preparing for a client session, reflecting on a conversation.
- **Wednesday: LinkedIn — The Story:** "A client came to me last quarter with [situation]. Here's what we tried first, why it didn't work, and what we did instead."
- **Thursday: Instagram — Framework carousel:** A practical framework your audience can use immediately.
- **Friday: LinkedIn — The Proof:** "One specific metric from a client engagement: [result]. Here's the approach that made it possible."

For speakers, your AI Manager creates pipeline-building content between gigs. For coaches, it creates methodology-specific content that differentiates you.

## Pro Tips

- **Upload your Style Guide.** Go to Settings → Style Guide → Upload a document describing your tone.
- **Don't genericize.** The distinctiveness of your approach IS your competitive advantage.
- **LinkedIn is your primary conversion channel.** Two or three posts per week can significantly increase your visibility.

## Recommended Plan

- **LinkedIn only:** Free plan
- **LinkedIn + Instagram + Twitter/X:** Pro (\$29/mo)

- **Adding per-platform frequency control:** Panorama (\$59/mo)
- **All platforms:** Scale (\$99/mo)

# Chapter 8: ForaPost for Authors & Course Creators

## Why Social Media Matters for Authors & Course Creators

Authors are the ideal Collateral Upload user. You already have a mountain of intellectual property — manuscripts, course frameworks, episode transcripts. The problem isn't ideas. The problem is that your expertise is deep and specific while your social content is generic and surface-level.

For authors, uploading your manuscript lets your AI Manager create daily content from existing IP — direct quotes, thematic discussions, behind-the-writing content — without you writing a single caption. For course creators, the counterintuitive truth is that giving away your best thinking as free social content builds the trust that makes the purchase inevitable. For podcasters, each episode gets one social post and then disappears — a single transcript uploaded to Collateral gives your AI Manager enough material for 30 days of derivative posts.

## What to Upload

### For authors:

- Your manuscript or excerpts
- Book synopsis, thematic notes, and character backstories
- Author bio and platform materials
- Reading community content — discussion questions, book club guides

### For course creators:

- Course frameworks, lesson outlines, key insights
- Teaching methodology and educational philosophy
- Launch timelines and waitlist information

### For podcasters:

- Episode transcripts (the single most valuable upload — one transcript produces 30 days of content)
- Show notes and guest bios
- Key quotes and subject-matter observations

## Which Feature to Start With

**Collateral Upload.** Upload everything.

**For authors:** Upload your manuscript (or excerpts), book synopsis, and thematic notes. Your AI Manager creates three content streams: direct quotes from the work (naming the published title), paraphrased insights from your themes, and author personality content.

**For course creators:** Upload your course frameworks and key insights. Your AI Manager creates posts that teach your best material completely — not teasers, but full tactical insights. For launches, create Catalog Maker records for each launch phase, check "Treat as Event," and set dates across a 30-day sequence.

**For podcasters:** Upload your episode transcript after each recording. Your AI Manager creates a multi-week content map: quote graphics, key insight posts, counterpoint discussions, audience question prompts, and guest collaboration content. One hour of conversation becomes a month of content.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: book themes and insights, writing/creation process, reading community engagement, expertise demonstrations, personal creative journey
- Goals weighting: Leadership 40%, Awareness 30%, Engagement 25%, Other 5%
- Approach: Consultative 30%, Relatable 30%, Authoritative 25%, Engaged 15%

**Set your Journey Distribution:**

For authors: Awareness 35%, Interest 30%, Consideration 20%, Conversion 15%, Loyalty 0% (raise to 10% once you have a reader community). For course creators: Awareness 25%, Interest 35%, Consideration 20%, Conversion 20% — during launch windows, switch to the "product\_launch" preset. For podcasters: Awareness 30%, Interest 35%, Consideration 20%, Conversion 15%.

**Add Calendar Events:**

- Book Launch Dates — with lead-up sequences (6–9 month ramp for traditional publishing)
- Course Launch Windows — 30-day launch calendar
- Episode Release Schedule — recurring weekly Calendar Events
- Seasonal Reading Trends — summer reads, holiday gift guides

**Add AI Instructions:**

- "For book content: always name the published title when quoting or referencing the work."
- For course creators: "Give away 90% of the best thinking as free content."
- For podcasters: "Never post 'New episode out now! Link in bio!' — instead, share a standalone insight from the episode."

## What a Typical Week Looks Like

A typical week for an author on Pro (2 posts/day, 3 platforms):

- **Monday: Instagram — Book quote:** A direct quote from the work with the title named.
- **Tuesday: LinkedIn — Thematic discussion:** A theme from the book explored in context of a current conversation.
- **Wednesday: Instagram — Behind-the-writing:** The process, the research, why this book exists.
- **Thursday: Instagram — Community engagement:** A discussion question, a book club guide excerpt.
- **Friday: Twitter/X + Instagram — Author personality:** What you're reading, your writing routine, a recommendation.

For course creators, your AI Manager balances free teaching content with launch sequence content. For podcasters, each episode creates weeks of derivative social content.

## Pro Tips

- **Authors: upload your full manuscript.** Your AI Manager creates content you'd never think to extract.
- **Course creators: give away 90%.** The free content proves the paid course is worth it.
- **Podcasters: upload transcripts, not just links.** A standalone insight from the episode makes strangers care before they know the episode exists.

## Recommended Plan

- **One platform:** Free plan
- **Instagram + Twitter/X + LinkedIn:** Pro (\$29/mo)
- **Adding TikTok (BookTok) or YouTube:** Pro (\$29/mo) minimum

- **4+ platforms:** Panorama (\$59/mo)

# Chapter 9: ForaPost for Home Services

## Why Social Media Matters for Home Services

Home services has the simplest content strategy of any vertical: before/after photos from every job. Period.

Landscaping is the most visual trade that exists. One split-screen transformation photo does more work than a hundred "5 tips for a healthier lawn" posts. Cleaning transformation videos are among the most-watched content categories on TikTok. Auto repair trust is built through education, not promotion. Interior design sells through the mood board and the design journey, not just the finished room.

Every job you complete and don't photograph is a marketing opportunity wasted.

## What to Upload

### For landscapers:

- Before/after photos from every job (same angle, same distance)
- Location details (neighborhood/city) for local search visibility
- Time-lapse video clips of transformations

### For cleaning companies:

- Before/after transformation photos
- Team member profiles
- Satisfying cleaning video clips

### For auto repair shops:

- Diagnostic explanation photos and videos
- Educational content about common maintenance mistakes
- Job showcase before/after photos with explanations

### For interior designers:

- The full design journey — mood board, material selections, in-progress, final reveal
- Project documentation organized by type

### For roofers, pool companies, and other trades:

- Every completed job with before/after photos
- Seasonal service content
- Certifications and crew profiles

## Which Feature to Start With

### Catalog Maker with Before/After Photos.

Open Catalog Maker → Create a record for every completed job → Use Before/After Photo to pair the starting condition and the finished result (same angle, same distance) → Write the location (neighborhood or city for local SEO), what the work involved, and how long it took.

**For landscapers:** Include the neighborhood name in every record. "Complete lawn renovation in Maple Ridge" feeds Instagram's keyword-based local discovery.

**For cleaning companies:** Tag records with descriptive labels to help your AI Manager vary the content tone. Transformation records get satisfying, results-focused language. Tip records get helpful, educational language. Team records get personal, trust-building language.

**For auto repair shops:** Tag records with descriptive labels. Myth-buster records get engaging, educational language. Job showcase records get transparent, expertise-focused language.

**For interior designers:** Use Multi-Select Media to attach the full journey: mood board, material selections, in-progress photos, and the final reveal.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes should include: job transformations with location details, seasonal maintenance education, team profiles, customer testimonials
- Goals weighting: Awareness 40%, Engagement 25%, Leadership 20%, Other 15%
- Tone weighting: Direct 35%, Casual 30%, Authoritative 25%, Playful 10%
- Approach: Relatable 30%, Consultative 30%, Authoritative 25%, Engaged 15%

**Set your Journey Distribution:**

- **Awareness: 40%** — before/after transformations, seasonal tips, time-lapse videos.
- **Interest: 25%** — educational content, tool recommendations, process explanations.
- **Consideration: 20%** — customer testimonials, review highlights, team introductions.
- **Conversion: 15%** — seasonal booking prompts, availability announcements.

Or select the "brand\_awareness" preset and increase Awareness to 40%.

**Add Calendar Events:**

- Landscapers: spring prep (Mar), active season (Apr–Aug), fall prep (Sep–Oct), winter maintenance (Nov–Jan)
- Cleaning companies: spring cleaning (March), holiday prep (November)
- Auto repair: winter prep, summer road trip check, tire change seasons
- All: storm prep / post-storm recovery as timely Calendar Events

**Add AI Instructions:**

- "Include neighborhood or city name in every post — home services are hyper-local."
- "Every before/after must show the same angle and distance."
- "Post every completed job, not just the impressive ones."
- For cleaning: "Feature team members by name — clients want to know who is coming into their home."
- For auto repair: "Explain what was found and why it matters. Transparency builds trust."

**Set Media to "Uploaded Only" and Enable the Approval Queue** for photo quality.

## What a Typical Week Looks Like

**Landscaper:**

- **Monday: Instagram — Before/after transformation:** "Complete lawn renovation in Maple Ridge. Swipe to see where we started."
- **Tuesday: Facebook — Seasonal tip:** "March is the time to overseed thin spots before the spring growth surge."
- **Wednesday: TikTok — Time-lapse video:** 30-second transformation from overgrown to finished.
- **Thursday: Instagram — Team feature:** "Meet Jake — he's been on our crew for five years and leads our hardscaping installations."
- **Friday: Facebook — Customer review + before/after:** Google review screenshot paired with the transformation from that specific job.

### Cleaning company:

- Monday: Before/after transformation with neighborhood name
- Tuesday: Professional cleaning tip
- Wednesday: Product spotlight
- Thursday: Team member spotlight
- Friday: Satisfying 15-second dirty-to-clean video

### Auto repair:

- Monday: Myth-buster ("You need premium gas." False for most vehicles.)
- Wednesday: Car care tip
- Friday: Job showcase with diagnostic explanation

### Pro Tips

- **Photograph EVERY job.** A consistent library of transformations builds faster than waiting for the perfect project.
- **Include location in every record.** Home services are hyper-local.
- **Use "Uploaded Only" for media.** Stock photos signal you don't have real work to show.

### Recommended Plan

- **One platform (Facebook or Instagram):** Free plan
- **Instagram + Facebook + one more:** Pro (\$29/mo)
- **Adding TikTok:** Pro (\$29/mo) minimum
- **4+ platforms:** Panorama (\$59/mo)

Most home service businesses start on Pro with Instagram, Facebook, and TikTok.

# Chapter 10: ForaPost for Agencies

## Why Social Media Matters for Agencies

The agencies surviving the AI transition are the ones using AI as a per-client intelligence layer, not a one-size-fits-all content factory. ForaPost's Agency plan gives each client their own AI Manager trained on their specific brand materials — producing content that's client-specific at a cost structure that makes managing 50+ accounts feasible.

The agencies hitting scale without hiring aren't using template content. They're systemizing through three content layers per client: evergreen education (posts on rotation indefinitely), practice-specific trust content (team photos, testimonials), and local/timely content (community events, seasonal material). The template structure is consistent across clients; the content is unique to each.

## How the Agency Dashboard Works

ForaPost's Agency plan is invite-only, starting at \$29/seat with a minimum of 5 seats. Each seat is a client account with its own AI Manager, its own collateral library, and its own publishing configuration.

For each client, you:

- Upload their collateral — brand voice, service descriptions, team bios, marketing materials
- Set up their Catalog Maker — tagged records organized by content type
- Configure their AI Instructions — per-client guardrails for compliance
- Set up their Approval Queue — especially for regulated industries
- Connect their platforms — up to 8 platforms per client account
- Set their Journey Distribution — use the vertical-specific recommendations from the relevant chapter

## Per-Client Compliance

For agencies managing regulated industries, per-client AI Instructions are your moat.

**For law firm clients:** "Never imply case outcomes. Never make client-specific claims without written consent. Never create content that could be interpreted as legal advice."

**For dental/medical clients:** "Never include patient names without HIPAA-compliant authorization. Always include 'individual results may vary' with treatment outcomes."

**For veterinary clients:** Set up pet-feature content with owner permission workflows, educational health content by season, and community engagement content.

**For CPA/financial clients:** "Include 'consult with your tax professional' disclaimers. Never provide specific financial advice."

Each client's guardrails are independent. Compliance is the agency's competitive advantage.

## Set Up Your Content Strategy (Per Client)

For each client account, reference the relevant vertical chapter in this guide to configure:

- **Journey Distribution** — use the vertical-specific percentages
- **Content themes** — set the vertical-specific themes in Settings → Content
- **Calendar Events** — add the vertical-specific seasonal and recurring events
- **AI Instructions** — add vertical-specific compliance and content rules

Build content across three layers per client:

- **Layer 1: Evergreen education** — 50–100 educational posts adapted per client. Runs on rotation indefinitely.
- **Layer 2: Practice-specific trust** — Team photos, bios, testimonials, case studies. Update regularly.
- **Layer 3: Local and timely** — Community events, seasonal content, promotions. Set up as Calendar Events.

## What ForaPost Creates for Agency Clients

Each client gets content that sounds like their practice, not like a template. A dental agency managing 50 accounts creates content where each clinic features its own team, its own office, its own community, and compliance rules match each practice's state and specialty requirements.

The agency manages all of this from one dashboard.

## Recommended Plan

**Agency plan: \$29/seat, minimum 5 seats, invite-only.** Each seat includes advanced features: up to 8 platforms, 60 videos/month, 1 GB storage, no watermark, advanced scheduling and post creation settings, and dedicated support.

# Chapter 11: ForaPost for Creative Professionals

## Why Social Media Matters for Creative Professionals

For photographers, tattoo artists, florists, interior designers, DJs, and event professionals, your work IS the product. Your Instagram feed IS your portfolio. A potential client has three seconds to understand your style when they land on your profile — if those first nine posts show a clear point of view, the right client books immediately.

Creative professionals have a structural advantage: your daily work creates content naturally. Every project is a marketing asset. The businesses winning aren't doing extra marketing work. They've built a system for capturing what they already do.

## What to Upload and Which Feature to Start With

**For photographers:** Use Catalog Maker with Multi-Select Media to associate portfolio images with service categories. Tag by service line ("wedding," "corporate," "product," "portrait").

**For florists:** Use Catalog Maker with Video Carousel for arrangement time-lapses. Tag by occasion ("wedding," "sympathy," "everyday," "seasonal"). Process content outperforms product photos.

**For tattoo artists:** Curate your portfolio by style. Tag each piece by style. Post healed work prominently. For flash sales, use "Treat as Event" with countdown sequences.

**For DJs and event musicians:** Upload performance clips, crowd energy footage, and music selection philosophy to Collateral.

**For all creative professionals:** Set media to "Uploaded Only" — this is non-negotiable.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes: portfolio showcases, creation process, client stories, seasonal/occasion work, vendor relationships
- Goals weighting: Awareness 40%, Engagement 25%, Leadership 20%, Other 15%
- Tone weighting: Casual 30%, Inspirational 30%, Direct 25%, Authoritative 15%

### Set your Journey Distribution:

- **Awareness: 40%** — portfolio, process content, seasonal showcases.
- **Interest: 25%** — behind-the-scenes, vendor collaborations, creative philosophy.
- **Consideration: 20%** — client testimonials with event/project photos.
- **Conversion: 15%** — availability announcements, booking prompts.

### Add Calendar Events:

- Engagement Season (Jan–Mar) — bridal content
- Wedding Peak (May–Oct) — showcase season
- Valentine's Day / Mother's Day (florists)
- Holiday Season (Nov–Dec)

### Add AI Instructions:

- "Tag every vendor in every wedding/event post — each tag is a referral pipeline."

- "Show the creation process, not just finished work."
- "Portfolio content should be organized by service line."

### What a Typical Week Looks Like

- **Monday: Instagram — Portfolio showcase:** A recent project, tagged with all vendors involved.
- **Tuesday: Instagram Reel — Process content:** Time-lapse of arrangement building or editing session.
- **Wednesday: Facebook — Client story:** The couple who planned their wedding in 6 weeks.
- **Thursday: Instagram — Seasonal inspiration:** Current-season work, trending styles.
- **Friday: Instagram — Behind-the-scenes:** The preparation, the early morning setup.

### Recommended Plan

- **Instagram only:** Free plan
- **Instagram + Facebook + TikTok:** Pro (\$29/mo)
- **Adding Threads + LinkedIn (for corporate clients):** Panorama (\$59/mo)

# Chapter 12: ForaPost for Pet Services

## Why Social Media Matters for Pet Services

Pet owners search for their specific breed on TikTok and Instagram before choosing a groomer or trainer. A doodle owner searching "doodle groomer near me" finds the groomer whose feed is full of doodle transformations. Breed-specific content targets the exact audience most likely to book.

For pet groomers, the three-act grooming reel — before (matted/overgrown), during (the process), after (the fluffy reveal) — is the highest-performing content format. For dog trainers, behavioral transformation videos are undeniable proof of capability. For veterinary practices, educational pet health content builds the community bond that reduces no-shows.

## What to Upload and Which Feature to Start With

**For pet groomers:** Use Catalog Maker with Before/After Photos. Create a record for each grooming transformation. Tag by breed ("doodle," "poodle," "shih-tzu") AND by style ("puppy-cut," "breed-standard," "creative-groom"). Use Video Carousel for three-act grooming reels. Upload your grooming philosophy and gentle handling approach to Collateral.

**For dog trainers:** Use Before/After Photos or Video Carousel to pair the "before" behavior with the "after" result. Write what the issue was, your approach, and the outcome.

**For veterinary practices:** Use Catalog Maker with descriptive tags: "pet-feature" (patient photos with owner permission), "education" (seasonal health tips), "community" (pet events), "team" (staff profiles). Your AI Manager uses tags to vary the tone — pet feature records get warm, celebratory language while education records get informative, helpful language.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes: grooming transformations, breed-specific education, gentle handling, pet personality, wellness tips
- Goals weighting: Awareness 40%, Engagement 30%, Leadership 15%, Other 15%
- Tone weighting: Casual 35%, Playful 30%, Direct 20%, Inspirational 15%

### Set your Journey Distribution:

- **Awareness: 40%** — transformation reveals, breed-specific content.
- **Interest: 25%** — grooming education, gentle handling demonstrations.
- **Consideration: 20%** — client dog stories, nervous-dog success stories.
- **Conversion: 15%** — booking availability, seasonal grooming reminders.

### Add Calendar Events:

- National Pet Days: National Dog Day (Aug 26), National Cat Day (Oct 29)
- Holiday Pet Safety: July 4th fireworks anxiety, Halloween/Christmas chocolate warnings
- Seasonal Grooming: summer shave-downs (May–Jun), winter coat maintenance (Oct–Nov)
- Holiday bandana/costume photo opportunities (Oct, Dec)

### Add AI Instructions:

- "Tag content by breed whenever possible."
- "Address grooming anxiety directly."

- "Always get pet owner permission before posting photos."

## What a Typical Week Looks Like

- **Monday: TikTok — Grooming transformation:** Three-act reel with breed tag.
- **Tuesday: Instagram — Breed education carousel:** "Why Your Doodle Needs Grooming Every 6 Weeks (Not 12)."
- **Wednesday: TikTok — Nervous dog success story:** "Max was shaking when he got here. By the end, he was leaning into the brush."
- **Thursday: Instagram — Partner spotlight:** Monthly feature of a local vet or pet store.
- **Friday: Instagram — Personality content:** The dog who fell asleep in the dryer.

## Recommended Plan

- **One platform:** Free plan
- **Instagram + Facebook + TikTok:** Pro (\$29/mo) — TikTok is exceptionally valuable for pet content
- **4+ platforms:** Panorama (\$59/mo)

# Chapter 13: ForaPost for Nonprofits & Education

## Why Social Media Matters for Nonprofits & Education

Nonprofits and educational organizations have compelling stories but limited marketing staff. The impact you create every day — the students you serve, the communities you support, the events you host — is inherently shareable content. The challenge is consistency, not creativity.

Social media builds donor relationships between annual campaigns, keeps your community engaged between events, and reaches new supporters who haven't heard of your mission yet.

## What to Upload and Which Feature to Start With

### Use Catalog Maker with "Treat as Event" and descriptive tags.

Create records for your programs, events, and impact stories. Tag each with descriptive labels: "impact" (the work you do), "event" (fundraisers, community programs), "team" (staff and volunteer spotlights), "education" (your mission, your approach). Your AI Manager uses tags to vary the tone — impact records get compelling, story-driven language while event records get urgency-driven, action-focused language.

For events, check "Treat as Event" and set dates. Your AI Manager publishes announcements, reminders, and recap content automatically.

Upload your mission statement, annual reports, program descriptions, and impact data to Collateral.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes: program impact stories, event documentation, volunteer/staff spotlights, mission education, community engagement
- Goals weighting: Awareness 35%, Engagement 30%, Leadership 20%, Other 15%
- Tone weighting: Inspirational 35%, Casual 25%, Direct 25%, Authoritative 15%

### Set your Journey Distribution:

- **Awareness: 35%** — impact stories, mission education, program descriptions.
- **Interest: 30%** — volunteer spotlights, behind-the-scenes, community engagement.
- **Consideration: 20%** — specific outcomes data, participant testimonials, event recaps.
- **Conversion: 10%** — donation prompts, event registration, volunteer sign-ups.
- **Loyalty: 5%** — donor appreciation, recurring supporter features.

### Add Calendar Events:

- GivingTuesday (first Tuesday after Thanksgiving)
- Annual Gala / Major Fundraiser dates
- Program Milestones (100th student, new program launch)
- Seasonal Volunteer Drives
- Awareness Months relevant to your mission

### Add AI Instructions:

- "Lead with impact, not asks. Show the work — not just the need."
- "Feature volunteers and staff by name."

- "Keep fundraising content to 10% of posts."

## What a Typical Week Looks Like

- **Monday: Facebook — Impact story:** One person, one program, one outcome.
- **Tuesday: Instagram — Team spotlight:** "Meet Priya — she's been volunteering with us every Saturday for two years."
- **Wednesday: Facebook — Program update:** What's happening this week, upcoming events.
- **Thursday: Instagram — Community engagement:** A question for supporters, behind-the-scenes.
- **Friday: LinkedIn — Mission education:** Why your work matters, data about the problem you're solving.

## Pro Tips

- **Lead with impact, not asks.** Impact stories build the trust that drives donations.
- **Use Calendar Events for recurring programs.** Your AI Manager handles advance content and post-event recaps.
- **Feature volunteers and staff.** The people doing the work are your most compelling content.

## Recommended Plan

- **One platform:** Free plan — start with Facebook or Instagram
- **Instagram + Facebook + LinkedIn (for corporate donors):** Pro (\$29/mo)
- **4+ platforms:** Panorama (\$59/mo)

# Chapter 14: ForaPost for Medical & Dental

## Why Social Media Matters for Medical & Dental

Nobody wakes up excited to go to the dentist. The practices winning on social media are the ones that make the experience feel human and approachable. Team content builds the familiarity that reduces first-visit anxiety. Behind-the-scenes content transforms an abstract healthcare service into a place run by real people.

For dental practices, the untapped patient is the person who hasn't been to the dentist in years because they're anxious. Content that directly addresses that anxiety — honestly, specifically, without minimizing it — reaches this audience. For med spas, the trust gap is answered by content showing who is doing the work, how it works, and what the experience feels like. For optometrists, the barrier to standing out is unusually low — most competitors post nothing at all.

## What to Upload and Which Feature to Start With

### Use Catalog Maker with AI Instructions for compliance.

**For dental practices:** Create records tagged with descriptive labels — "team" (staff introductions), "anxiety-reduction" (custom tag: what to expect, pain management, pediatric focus), "behind-the-scenes" (custom tag: office tour, technology). Your AI Manager uses tags to vary the tone — team records get warm, personal language while anxiety-reduction records get gentle, reassuring language. For cosmetic cases, use Before/After Photos only with proper written HIPAA authorization. Write the treatment type, timeframe, and realistic expectations disclaimer.

**For med spas:** Create records for each treatment across three patient journey stages. Tag with descriptive labels: "awareness" (custom tag: how treatments work), "consideration" (custom tag: practitioner credibility), "decision" (custom tag: patient testimonials with consent).

**For optometrists:** Upload your eye health education materials, practice information, and frame descriptions to Collateral. Three posts per week is the threshold for measurable results in a vertical where most competitors post nothing.

### Set compliance guardrails immediately:

Go to AI Instructions and add rules specific to your practice:

- **For dental:** "Never include patient names without HIPAA-compliant written authorization. Always include realistic expectations when discussing cosmetic outcomes."
- **For med spas:** "Never use 'permanent,' 'guaranteed,' 'risk-free,' or '100%.' Always include 'individual results may vary' with treatment outcomes. Never compare results to competitors."

Go to Settings → Words to Avoid and add: "permanent," "guaranteed," "risk-free," "miracle," "cure," plus any competitor names.

Enable the Approval Queue — for regulated industries, this is your compliance checkpoint, not optional.

## Set Up Your Content Strategy

**Review your brand profile.** Go to Settings → Content and verify:

- Content themes: patient anxiety reduction, treatment education, team introductions, behind-the-scenes, patient success stories (with consent), preventive care
- Goals weighting: Leadership 40%, Awareness 30%, Engagement 20%, Other 10%
- Tone weighting: Authoritative 30%, Casual 30%, Direct 25%, Inspirational 15%

- Approach: Consultative 40%, Relatable 30%, Authoritative 20%, Engaged 10%

### Set your Journey Distribution:

For dental practices: Awareness 30%, Interest 30%, Consideration 25%, Conversion 10%, Loyalty 5%. Reducing anxiety is the primary interest-stage goal. Keep conversion low — healthcare decisions are trust-driven.

For med spas: Awareness 30%, Interest 30%, Consideration 25%, Conversion 10%, Loyalty 5%.

For optometrists: Use the "balanced" preset. Three posts per week is the threshold.

### Add Calendar Events:

- Dental Health Month (February)
- Back-to-School Checkups (August)
- Insurance Benefits Deadline (November/December — "use your benefits before they expire")
- Holiday Smile Prep (November–December)
- New Year Health Resolutions (January)
- Seasonal Skin Concerns (med spas — sun damage summer, dryness winter)

### What a Typical Week Looks Like

- **Monday: Instagram — Education:** "What actually happens during a root canal — it's not what you think." (dental) / "How Botox actually works — the science in plain English." (med spa)
- **Tuesday: Facebook — Team feature:** "Meet Dr. Chen — she's been with our practice for 8 years and specializes in pediatric dentistry."
- **Wednesday: Instagram — Anxiety reduction:** "Haven't been to the dentist in years? You're not alone. Here's what your first appointment back actually looks like."
- **Thursday: Instagram — Patient success** (with consent): Treatment journey with realistic timeline and "individual results may vary."
- **Friday: Facebook — Behind-the-scenes:** "A look inside our new treatment room — designed to feel calm, not clinical."

### Pro Tips

- **Address dental anxiety directly.** Content about what an appointment feels like reaches the patients who've been avoiding care.
- **Med spas: post the journey, not the procedure.** The consultation, treatment process, recovery timeline, and result — that's what converts.
- **HIPAA compliance is non-negotiable.** Fines reach \$50,000 per violation. Only post patient content with proper written authorization.
- **For optometrists: just start posting.** The competitive bar is remarkably low.

### Recommended Plan

- **One platform (Facebook or Instagram):** Free plan
- **Instagram + Facebook + one more:** Pro (\$29/mo)
- **Adding TikTok for educational videos:** Pro (\$29/mo) minimum
- **4+ platforms:** Panorama (\$59/mo)

# Feature Reference

A complete list of every ForaPost feature referenced in this guide.

Feature	What It Does
<b>Catalog Maker</b>	Create records for products, services, team members, events, or any content you want featured in posts. Each record has a photo, description, and optional tags. Your AI Manager draws from these records to create daily posts.
<b>Catalog Maker — Tagging</b>	Tag Catalog Maker records with descriptive labels (e.g., "team," "product," "education," "before-after"). Your AI Manager uses tags to vary the tone and language of posts — product-tagged records get sales-focused language, event-tagged records get urgency-driven language, team-tagged records get warm, personal language.
<b>Catalog Maker — Treat as Event</b>	Check this box on a Catalog Maker record to make it date-specific. Your AI Manager publishes event announcements, reminders, and countdowns on schedule.
<b>Catalog Maker — Before/After Photos</b>	Pair a "before" and "after" image in a single Catalog Maker record. Your AI Manager creates split-screen or progression posts showing the transformation.
<b>Catalog Maker — Multi-Select Media</b>	Attach multiple photos or videos to a single Catalog Maker record. Your AI Manager creates carousel-style posts from these collections.
<b>Catalog Maker — Video Carousel</b>	Attach short video clips to Catalog Maker records. Your AI Manager uses these in Reels, TikTok, and YouTube Shorts content.
<b>Collateral Upload / Website Import</b>	Upload documents (PDF, DOCX, PPTX), images, videos, and website URLs. Your AI Manager analyzes everything to learn your voice and create content from your existing materials.
<b>E-commerce Integration</b>	Connect your Shopify, Etsy, WooCommerce, or Amazon store. ForaPost pulls your product catalog automatically — images, descriptions, prices, links — and creates daily product content.
<b>Calendar Events</b>	Add holidays, seasonal dates, and business events to your content calendar. Your AI Manager creates seasonally aware content around these dates with automatic lead-up sequences.
<b>Journey Distribution</b>	Control how your content is balanced across the marketing funnel — from Awareness (educational, soft CTAs) to Conversion (product highlights, hard CTAs). Six presets available: balanced, brand_awareness, direct_sales, product_launch, clearance, and custom.
<b>Insights Dashboard</b>	Monitor comments, mentions, tags, and reviews across all connected platforms from one place.
<b>Media Settings — Uploaded Only</b>	Set to "Uploaded Only" so your AI Manager only uses photos and videos you've provided — never AI-created images. Essential for visual businesses.
<b>AI Instructions</b>	Add specific rules your AI Manager must follow in every post. Used for compliance guardrails, brand voice rules, content strategy directives, and content restrictions.

Feature	What It Does
<b>Words to Avoid</b>	Add terms your business should never use in posts. Your AI Manager checks every post against this list before publishing.
<b>Style Guide Upload</b>	Upload a document describing your brand's tone, personality, and communication style.
<b>Approval Queue</b>	Review and approve posts before they go live. Each approval or rejection teaches your AI Manager your preferences.
<b>Platform-Specific Settings</b>	Set different posting frequencies and content types for each platform independently. Available on Panorama and Scale plans.
<b>Agency Dashboard</b>	Manage multiple client accounts from one place. Each client gets their own AI Manager with independent collateral, instructions, and publishing configuration. Agency plan only.
<b>Manual Post Creation</b>	Create and schedule your own posts directly.
<b>Cross Post</b>	Republish an existing post to additional platforms.
<b>Save Media</b>	Save AI-created images or videos from a post back to your collateral library.
<b>Catalog Maker — CSV Bulk Upload</b>	Upload a .CSV file to create Catalog Maker records in bulk.
<b>Scheduling Controls</b>	Set your preferred posting times and days.
<b>Advanced Scheduling Settings</b>	Set different posting cadences and time slots per platform. Panorama and Scale plans only.
<b>Replace Media</b>	Swap the image or video on any scheduled or draft post without changing the caption.

# Pricing & Plans

## Individual Plans

	Free	Pro	Panorama	Scale
Monthly price	\$0	\$29	\$59	\$99
Annual price	\$0	\$290 (2 mo free)	\$590 (2 mo free)	\$990 (2 mo free)
Posts per platform per day	1	2	3	4
Platforms	1	3	6	8 (all)
Videos per month	4	60	90	120
Collateral storage	100 MB	1 GB	5 GB	10 GB
Watermark on posts	Yes	No	No	No
YouTube & TikTok	No	Yes	Yes	Yes
Per-platform daily limits	No	No	Yes	Yes
Media type controls	No	No	Yes	Yes
Thread support (Twitter/X & Bluesky)	No	No	Yes	Yes
Priority support	No	No	Yes	Yes

## Agency Plan

\$29/seat (minimum 5 seats) — invite-only. Includes advanced features per seat, multi-client dashboard, up to 8 platforms per client, advanced posting and creation settings, and dedicated support. Annual billing: \$290/seat (2 months free).

## Add-Ons

Add-On	Price
+30 posts	\$15
+30 videos	\$45
+2 GB storage	\$5/year

## Platforms Available by Plan

Platform	Free	Pro+
Instagram	Yes	Yes
Facebook	Yes	Yes
Twitter/X	Yes	Yes
LinkedIn	Yes	Yes
Threads	Yes	Yes
Bluesky	Yes	Yes

Platform	Free	Pro+
TikTok	No	Yes
YouTube	No	Yes

# Frequently Asked Questions

## How long does it take for my AI Manager to start creating content?

After you complete onboarding (uploading collateral, connecting platforms, and calibrating with sample posts), your AI Manager begins creating content immediately. Most users see their first real posts within 24 hours.

## Will the posts sound like me or like a robot?

Your AI Manager learns your voice from the materials you upload and the sample posts you rate during calibration. The more collateral you provide, the more accurately it captures your tone. You can fine-tune further with the Style Guide, AI Instructions, and by editing posts in the Approval Queue.

## Can I edit posts before they go live?

Yes. Enable the Approval Queue from Settings. Every post goes to your review queue first. You can approve, edit, or reject each one.

## What if I want to stop using ForaPost?

Your social media accounts remain yours. ForaPost only posts on your behalf — it never changes your account settings, followers, or profile information. You can disconnect platforms and cancel at any time.

## Do I need to create content every day?

No. That's the point. You upload your materials once (and add new materials as your business evolves), and your AI Manager creates daily content from that library.

## Can ForaPost reply to comments and DMs?

No. Your AI Manager creates and publishes content only. You can monitor all engagement from the Insights Dashboard and respond personally.

## Is my content unique, or does ForaPost reuse the same posts for different businesses?

Every post is created uniquely for your business, from your specific materials, in your specific voice. No content is shared or reused between accounts.

## What happens if I run out of videos or posts in a month?

You can purchase add-on packs: +30 posts for \$15, +30 videos for \$45. Available from Settings → Billing.

## Can I connect multiple Instagram accounts?

Each connected platform counts as one of your plan's platform slots.

## Does ForaPost work for businesses outside the US?

ForaPost creates content in English and publishes to global social media platforms. The platform is accessible worldwide, though some features may have regional availability.

## How does Journey Distribution work?

Journey Distribution controls how your content is balanced across the marketing funnel. You set percentage weights for five stages: Awareness (educational, soft CTAs), Interest (how-to, practical tips), Consideration (features, benefits), Conversion (product highlights, hard CTAs), and Loyalty (community, appreciation). Six presets are available, or you can create a custom mix. Your AI Manager uses these weights to plan your content calendar each week.

## What do Catalog Maker tags actually do?

Tags affect the tone and language of posts your AI Manager creates from those records. A product-tagged record gets sales-focused, benefit-driven language. An event-tagged record gets urgency-driven language with timing details. Tags help your AI Manager write the right kind of post for each record — they're a tone signal, not a frequency control.

# On Our Vision Board: ForaPoster — Your AI Social Media Manager

Everything in this playbook describes what ForaPost does today. But we're building something more.

ForaPoster is a conversational AI social media manager coming to ForaPost. Instead of navigating dashboards and settings, you'll talk to your AI Manager directly — and it will talk back.

## What ForaPoster will do:

**Explain your content.** Ask "why did you post that?" and get a real answer — which trends influenced it, which of your collateral it drew from, why it chose that platform and timing.

**Teach you what works.** Ask "what should I post more of?" and get data-driven advice specific to your business.

**Create on the spot.** Say "write me a post about our spring menu" and your AI Manager creates it in your voice, ready to review and publish.

**Take action for you.** Tell it to approve your queue, reschedule a post, update your words-to-avoid list, or pause publishing for the weekend.

**Know your business deeply.** ForaPoster isn't a generic chatbot. It has been running your account — it knows every post it created, every edit you made, every signal it used.

**How it will work:** ForaPoster will be available as a chat panel in your ForaPost dashboard. Open it from any page and it knows where you are and what you're looking at. ForaPoster will be available as an add-on credit package. Every ForaPost user gets a free trial.

**Giving your AI Manager a name:** You'll be able to give your ForaPoster a first name. Set it in Brand Settings — your AI Manager becomes "Luna ForaPoster" or whatever feels right for your business.

ForaPoster is in development. We'll announce availability to all ForaPost users when it's ready.

# Getting Started

You've read the chapter for your business. You know what to upload, which features to use, and what your AI Manager will create.

Here's what to do next:

- **Go to forapost.online** and create your account
- **Upload your collateral** — the documents, photos, and videos that represent your brand
- **Connect your platforms** — Instagram, Facebook, LinkedIn, and whichever others fit your business
- **Review your first posts** — rate the sample posts, enable the Approval Queue, and watch your AI Manager learn your voice
- **Set up your content strategy** — review your AI-created brand profile, adjust your Journey Distribution, add Calendar Events, and set AI Instructions using the recommendations in your chapter
- **Add to your Catalog Maker** — the more records you create (with photos, descriptions, and tags), the more varied and specific your content becomes

Your AI Manager takes it from there. Consistent, platform-specific, brand-accurate social media content — created daily, published on schedule, in your voice.

**Start Free** → [forapost.online](https://forapost.online)

The Small Business Social Media Playbook

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