LIVE

LERU TRAINING · SALES

Your Digital Sales Presence With AI

Take-home guide · prompts, setup and routine

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Latinos En Roofing University · LERU Training

Prices, plans and menus checked on October 9, 2026. They change often: verify them before you use them.

The method

Record once. Post on five. Use the same idea on all 5 platforms, with each one's wording and format. AI writes, Postiz publishes, you review.

1	Record 1 video
2	AI adapts the text
3	Postiz schedules it
4	It goes out on all 5

Consistency beats perfection.

Start with 3 posts a week. Only scale up when you can keep it going.

Three tools, three jobs

AI assistant Claude or ChatGPT	Strategist and writer: ideas, scripts, captions, calendar and results review.
Design tool Canva	Your studio: graphics, thumbnails, carousels and video editing.
Scheduler Postiz	Your distributor: calendar, publishing to all 5 platforms and analytics.

Five places, one method

Facebook	**Your local community**
Instagram	**Visual trust**
TikTok	**Discovery and reach**
YouTube	**Search and Shorts**
LinkedIn	**Credibility and referrals**

Identity and security

IDENTITY

■	A professional email just for your social accounts
■	Ask your company: personal or company-owned accounts? What can you post?
■	The same name on all 5 platforms
■	The same @username (check it is free on all of them)
■	The same photo: your face, facing forward, good light
■	A clear bio: who you are, who you work with, where, and how to reach you
■	One main contact method

SECURITY

Unique password	A different one for each platform. Never the same as your email.
Two-step verification	Turn it on for all 5. If someone steals the password, they still can't get in.
Recovery method	A backup phone and email that you control.
Password manager	An app that keeps all your passwords for you.
Golden rule	Never give passwords or verification codes to AI, or to anyone who asks by message.

Set up the 5 platforms

App menus change. If a button moved, search the option name in the app's help.

Facebook · Your local community

Why: Schedulers publish to Facebook Pages, not personal profiles. You need a Page under your name.

1	Log in to your personal Facebook profile (the Page is created from there, and your profile is not shown on it).
2	Go to facebook.com/pages/create, or Menu → Pages → Create new Page.
3	Name: your professional name (for example "John Perez · Roofing"), if your company policy allows it.
4	Pick up to 3 categories and write a short bio. Tap Create Page.
5	Add a profile photo, cover photo, phone, email and service area.
6	In the Page settings, create your @username, the same one you will use everywhere else.

Instagram · Visual trust

Why: To publish through a scheduler, the account must be professional (Creator or Business).

1	Create the account or log in with your professional email.
2	Go to your profile → menu (top right) → Settings and privacy.
3	Scroll to "For professionals" → Account type and tools → Switch to professional account.
4	Pick a category, then Creator or Business. Confirm.
5	Note: a professional account is always public.
6	Optional: connect it to your Facebook Page so you manage both together.

TikTok · Discovery and reach

Why: This is where one short video can reach thousands of people who don't know you yet.

1	Download the app and sign up with your professional email.
2	Use the same name, @username, photo and bio as everywhere else.
3	Profile → menu → Settings and privacy → Account.
4	If your scheduler requires it (Buffer does), tap Switch to Business Account.
5	Add your contact phone or email to the profile.

YouTube · Search and Shorts

Why: People search roofing questions on YouTube. Your videos keep working months later.

1	Go to youtube.com and sign in with a Google account (use your professional email).
2	Tap your photo (top right) → Create a channel.
3	Enter your name and @handle, the same as everywhere else.
4	Customize the channel: photo, banner, description and contact email.
5	Upload short vertical videos as Shorts and longer explanations as regular videos.

LinkedIn · Credibility and referrals

Why: Real estate agents, property managers and other professionals look you up here.

1	Sign up at linkedin.com/signup with your professional email.
2	Upload a professional photo and a simple banner.
3	Headline: what you do and where (for example "Residential Roofing Advisor · [City]").
4	Fill in About, Experience (your company) and your location.
5	Customize your URL: Me → View profile → Edit public profile & URL.

Connect Postiz

1	**Create your account.** Go to platform.postiz.com and start the 7-day free trial. The Standard plan includes 5 channels: exactly your 5 platforms.
2	**Add a channel.** In the Calendar, on the left sidebar, tap Add Channel and pick the platform.
3	**Authorize on the platform.** You are sent to the official Facebook, Instagram, TikTok, YouTube or LinkedIn screen. Review the permissions and approve. Never give your password to anyone else.
4	**Finish the extra step.** Facebook asks which Page and YouTube asks which channel. The channel won't work until you finish that step.
5	**Confirm it is connected.** Your photo appears in the left sidebar. A red (!) means it needs to be reconnected.
6	**Repeat, one at a time.** Connect all 5 platforms one at a time and confirm each before moving on.
7	**Make a test post.** Schedule something simple and low-risk for 10 minutes from now.
8	**Check your profile.** Open each app and confirm it posted where it should. On TikTok, check whether it posted directly or landed in your inbox to finish in the app.

With Claude

1	**Open the directory.** In Claude, go to claude.ai/directory/postiz and tap Connect.
2	**Approve access.** Sign in to your Postiz account when Claude asks. No API key needed.
3	**Test the connection.** Type: "Show me my connected channels in Postiz."
4	**Ask for a draft first.** "Schedule this video as a draft on my 5 channels for Thursday at 6 pm." Review it in Postiz before it publishes.

ChatGPT also has a Postiz app. Always ask for a draft first and review it before it publishes.

Other options

Postiz What we use	Standard $29/mo · 5 channels · 7-day trial • All 5 platforms on one calendar • Official connector for Claude, and also ChatGPT • Per-post and per-platform analytics
Metricool Alternative	Free: 1 brand, 20 posts/mo, no LinkedIn · Starter from $25/mo • Good free plan to start • Connector for Claude and ChatGPT • LinkedIn needs a paid plan
Buffer Alternative	Free: 3 channels, 10 scheduled posts per channel · paid per channel • Very simple to use • Personal Instagram is reminder-only (you post it) • TikTok needs a business account

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Your AI assistant

Paste this once into a Claude Project (Projects → New project → Instructions) or a custom GPT. Replace what's in [brackets].

```
# My Roofing Sales Content Assistant

Act as my personal social media strategist for my roofing sales career.

## My information
- Name: [Your Name]
- Roofing company: [Company]
- Service area: [City and surrounding areas]
- Ideal customers: homeowners, property owners and referral partners
- My experience: [Experience level]
- My personality: professional, approachable, knowledgeable and helpful
- Languages: I post in [English / Spanish / both]
- Primary goal: get seen and known in my area, build trust, start conversations and generate
qualified roofing appointments.

## Your responsibilities
1. Generate practical content ideas.
2. Write short video scripts that sound natural when spoken.
3. Write captions for LinkedIn, Facebook, Instagram, TikTok and YouTube, adapted to each
platform.
4. Build a weekly content calendar.
5. Turn one idea into different formats for each platform.
6. Suggest hooks (the first 2 seconds) that stop the scroll.
7. Suggest simple graphics, carousels and video concepts.
8. Recommend clear, professional calls to action.
9. Help me review results and improve the next round of content.

## Content rules
- Use simple, natural language.
- Teach before selling.
- Keep content relevant to my local market.
- Never invent customer testimonials, project results, facts or personal experiences.
- Never promise insurance coverage or claim outcomes.
- Do not give legal or policy interpretations as definitive advice.
- Protect customer privacy and follow my company's policies.
- Avoid misleading claims and generic motivational filler.
- If a fact is missing, ask me instead of inventing it.

Start by interviewing me about my background, company, market, goals and personality. Ask one
question at a time. Then create my first 30-day content plan.
```

The 7 prompts

Replace what's in [brackets] with your real details. Review everything before you post.

1 · Video ideas

```
Give me 20 short video ideas for a roofing salesperson in [City]. Focus on questions homeowners actually ask. For each, give me a hook for the first 2 seconds, a 20-30 second script and a call to action.
```

2 · Hooks that stop the scroll

```
Write 15 one-line hooks for roofing videos that make someone stop scrolling. Mix questions, common mistakes, "what nobody tells you" and before/after. No insurance promises and nothing made up. Topic: [topic].
```

3 · Weekly calendar

```
Create a weekly content calendar for my roofing sales business. Include educational posts, field videos, trust-building content, local community content and one soft invitation to contact me. Make it manageable for someone who is actively selling.
```

4 · Repurpose one video

```
Turn this video into an Instagram Reel caption, a TikTok caption, a Facebook post, a LinkedIn post, and a YouTube Shorts title and description. Adapt the wording and format to each platform instead of copying the same post everywhere: [paste video script].
```

5 · Visual identity

```
Create a simple visual brand guide for my roofing sales profile. Recommend two fonts, a small color palette, a profile photo style, a thumbnail layout and three reusable educational graphic templates. Keep the design professional and consistent.
```

6 · Bio for all 5 platforms

```
Write my bio for LinkedIn, Facebook, Instagram, TikTok and YouTube. Respect each platform's character limit. Include who I am, the company I work with, my service area and how to contact me. Use only the facts I give you: [your details].
```

7 · Review results

```
Review these social media results. Tell me which posts generated the most views, engagement, profile visits, messages and appointments. Recommend three experiments for next week: [paste your results].
```

Content that gets attention

The weekly mix

40%	**Education** Signs of damage, inspections, ventilation, shingle types, homeowner questions.
25%	**Behind the scenes** Safe inspections, field work, materials, the process.
20%	**Credibility** Finished projects, real feedback with permission, lessons learned.
15%	**You and offers** Who you are, your community, invitations to ask.

It is a starting point. Adjust it to what works for you.

Hooks for the first 2 seconds

"If your roof looks like this after the storm, don't ignore it."
"What nobody tells you when you replace your roof."
"3 signs your roof is damaged (and you don't know it)."
"Before and after: here's what we found."

Show the damage, ask a question or break a myth, right away. Always record from the ground or with the safety gear your company requires.

Best Practices

■ Do this	■ Avoid this
Explain roofing concepts clearly	Only "call me for a free roof"
Use real project photos, with permission	Addresses, claim documents or customer details
Film safely and professionally	Filming on the roof without safety gear
Reply to comments	Fake reviews or made-up stories
Clear calls to action	Spam and mass messages

Your weekly routine

Monday	Ask AI for ideas and pick the topics.
Tuesday	Record 2 or 3 short videos, where it is safe and allowed.
Wednesday	AI writes the captions. Schedule everything in Postiz.
Daily	10–15 minutes replying to comments and messages.
Friday	Review views, profile visits, messages and appointments. Adjust.

Launch checklist

■	Professional email and security set up (unique password + two-step verification).
■	All 5 accounts created or audited: LinkedIn, Instagram, Facebook, TikTok and YouTube.
■	Same name, @username, photo, bio, service area and company on every one.
■	AI assistant set up with your real information.
■	Your first 10 content ideas generated.
■	Postiz open and at least one account connected.
■	Confirmed whether each platform publishes automatically or needs finishing by hand.
■	Your first 3 posts written, reviewed and scheduled.

Use AI to say what you already know. Use the scheduler to save time. And use your social media so everyone who looks you up finds someone they can trust with their roof.