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Free marketing guide

Meta Ads and Lead Generation Guide

Learn how to plan, launch and improve lead generation campaigns on Facebook and Instagram, calculate what a lead is worth to you, and turn more of those leads into customers with fast follow-up.

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By Editorial team

Read online: https://freetoolshelf.com/resources/marketing/meta-ads-lead-generation-guide/

Contents

Information to check before relying on it

- Meta campaign objectives (Awareness, Traffic, Engagement, Leads, App promotion, Sales): check the current Ads Manager objective list.
- Business asset naming (Meta Business Suite, business portfolio, Business Manager) and Events Manager location: check current Meta Business Help Centre.
- Meta Pixel and Conversions API setup options, including partner integrations and the Conversions API Gateway: check current Meta developer and help documentation.
- Instant form types (such as More volume and Higher intent) and form features: check current lead ads documentation.
- Advantage+ features (Advantage+ audience, placements, creative, Advantage+ leads campaigns) and their defaults: check current Meta documentation.
- Special Ad Categories (financial products and services, employment, housing, social issues, elections or politics), which countries they apply to and the targeting restrictions they impose: check current Meta advertising policies.
- Learning phase guidance (roughly 50 optimisation events per ad set within about a week): check the current Meta help article.
- Lead data download retention and CRM integration options for lead ads: check current Meta lead ads documentation.

Meta ads (on Facebook, Instagram, Messenger and Meta's partner network) are one of the most widely used ways for small businesses to generate enquiries. Unlike search advertising, where people type in what they want, Meta ads reach people while they scroll. That makes them powerful for creating demand, and it also means lead quality depends heavily on your offer, your creative, your form and how quickly you follow up.

This guide explains how to plan and run lead generation campaigns on Meta, how to work out what a lead is worth to you, and how to turn more of those leads into paying customers.

Who this guide is for and what you will be able to do

This guide is for small-business owners, freelancers, coaches, consultants, local service providers and marketers who want to generate leads from Facebook and Instagram. It assumes no previous experience with Ads Manager, though intermediate users will find the maths, testing and follow-up sections useful.

By the end you will be able to:

- Decide whether Meta ads suit your offer and whether to use instant forms or a landing page.
- Set up your business assets, Meta Pixel and Conversions API in the right order.
- Calculate break-even cost per lead from your margins and close rate.
- Build a lead campaign with sensible targeting, placements and budgets.
- Create ad creative that attracts the right people and filters out the wrong ones.
- Design a follow-up process that protects the value of every lead.
- Read results, diagnose problems and scale what works.

Meta updates Ads Manager, objective names, automation features and policies frequently. Where something depends on the current interface or policy, this guide says "at the time of writing". Check the Meta Business Help Centre for the current version before relying on any specific setting.

How Meta ads differ from search ads

Interruption, not intent

On Google Search, someone types "emergency electrician" and you respond. On Meta, the person was watching a friend's video and your ad appeared. They were not looking for you. This has three consequences:

1. **Your creative does the targeting.** The image, video and first line of text decide who stops scrolling. A clear, specific message attracts the right people.

2. **Your offer must be worth a pause.** "Contact us" is weak. "Get a free 15-minute roof photo assessment" or "Download the kitchen renovation price guide" gives a reason to act now.
3. **Follow-up matters even more.** Someone who filled in a form in ten seconds while scrolling may forget about it within an hour. Speed and persistence in follow-up often decide whether the lead becomes a customer.

How delivery works

Meta runs an auction for each ad impression. It combines your bid, its estimate of how likely the person is to take the action you optimise for, and its assessment of ad quality. Meta's delivery system then learns which people are most likely to complete your chosen conversion event. That is why the event you optimise for, and the quality of the data you send back, matter so much.

Meta versus Google for lead generation

Factor	Meta ads	Google Search ads
User mindset	Browsing, discovering	Actively searching
Best for	New demand, visual offers, local awareness, lead magnets	Capturing existing demand
Targeting	Automated audience finding plus optional signals	Keywords and search intent
Creative importance	Very high	Moderate (text ads, landing page)
Typical lead intent	Wider range, needs qualification	Often higher, but more expensive per click
Volume for niche services	Can create volume where search volume is low	Limited by how many people search

Many businesses use both. The Google Ads beginner's guide covers search.

Is Meta right for your offer?

A decision framework

Meta lead generation tends to work best when:

- The problem is common enough that many people in your area or market have it, even if they are not searching today.
- The offer can be shown visually (before and after results, a product in use, a person explaining something).
- There is a low-friction first step: a quote, a consultation, a guide, a trial, a visit.

- You can follow up quickly by phone, SMS, email or messaging.

It tends to struggle when:

- The product is highly technical and only relevant to a tiny group of specialists.
- Your only possible call to action is a large purchase with no intermediate step.
- You cannot respond to leads for days.
- Your industry falls into a restricted category you have not planned for (see the next section).

Special Ad Categories and regulated industries

At the time of writing, Meta requires advertisers to declare a Special Ad Category for ads about financial products and services (such as credit, loans, insurance and investment offers), employment, housing, and social issues, elections or politics. Declaring a category restricts targeting options. For example, detailed demographic targeting by age, gender or small postcodes may be limited or unavailable, and some audience features are restricted. The exact rules, and which countries they apply to, have changed over time and can differ by region, so check Meta's current advertising policies before building a campaign in these areas.

Ads about politics or social issues typically require authorisation and a "Paid for by" disclaimer. Other sectors, such as health, weight loss, alcohol, gambling, dating and cosmetic procedures, have their own policy rules. Local laws also apply: for example, financial promotions and health claims are regulated differently in the UK, EU, US, Australia and elsewhere. If you are unsure, read the policy and consider professional advice.

Know your numbers: what a lead is worth

Break-even cost per customer

Start with the value of a new customer and your gross margin.

Break-even cost per customer = average revenue per customer x gross margin

Worked example (illustrative numbers): A home cleaning company earns an average of $600 from a new customer in their first three months, with a 50% gross margin.

- Gross profit per customer = $600 x 0.50 = $300
- Break-even cost per customer = $300

Break-even cost per lead

Next, trace how many leads become customers. Meta leads often pass through several stages. Using illustrative rates:

Stage	Rate	From 100 leads
Leads submitted		100
Successfully contacted	70%	100 x 0.70 = 70
Booked an appointment or quote	40% of contacted	70 x 0.40 = 28
Showed up or accepted a visit	75% of booked	28 x 0.75 = 21
Became customers	1 in 3 of those who showed	21 / 3 = 7

Overall lead-to-customer rate = 7 / 100 = 7%.

Break-even cost per lead = break-even cost per customer x lead-to-customer rate = $300 x 0.07 = $21

So in this example, if leads cost more than $21 each and nothing else changes, the campaign loses money on the first three months of revenue. If customers stay for a year or more, you can justify a higher figure based on lifetime value. The customer lifetime value calculator helps estimate that.

Free tool: Lead Conversion Funnel Calculator

Try it free in your browser, no sign-up needed.

https://freetoolshelf.com/business-tools/lead-conversion-calculator/

Why follow-up improves the maths

Look at the table again. The first two stages (contact rate and booking rate) depend almost entirely on your follow-up process, not your ads. Consider a hypothetical improvement: faster responses and more persistent follow-up lift the contact rate from 70% to 85%, with every other rate unchanged.

- Contacted = 100 x 0.85 = 85
- Booked = 85 x 0.40 = 34
- Showed = 34 x 0.75 = 25.5
- Customers = 25.5 / 3 = 8.5

Suppose the business spent $1,500 to generate those 100 leads (a cost per lead of $15):

- Before: cost per customer = $1,500 / 7 = $214.29
- After: cost per customer = $1,500 / 8.5 = $176.47

Same ads, same spend, same leads: the cost to win a customer fell by about $38 purely because of follow-up. These figures are illustrative, but the structure applies to any business. Improving the steps after the form can be cheaper than improving the ads.

Funnel example from spend to leads

To plan a budget, work forwards from ad costs. With illustrative numbers:

Metric	Calculation	Result
Daily budget	Chosen	$40
Monthly spend	$40 x 30 days	$1,200
CPM (cost per 1,000 impressions)	Assumed	$15
Impressions	$1,200 / $15 x 1,000	80,000
Link click-through rate	Assumed	1.2%
Link clicks	80,000 x 0.012	960
Cost per click	$1,200 / 960	$1.25
Landing page conversion rate	Assumed	8%
Leads	960 x 0.08	76.8 (about 77)
Cost per lead	$1,200 / 76.8	$15.63

In this example the cost per lead of $15.63 is below the $21 break-even, so the campaign would be worth running and refining. Your own CPMs, click-through rates and conversion rates will differ by country, industry, season and creative, so treat every assumption as a placeholder to replace with your data. The customer acquisition cost calculator helps you track the full cost per customer.

Setting up your Meta business assets

Step 1: Business portfolio and Page

You need a Facebook Page for your business, and ideally an Instagram professional account connected to it. At the time of writing, Meta manages business assets through Meta Business Suite and a business portfolio (formerly Business Manager). The naming has changed over time, so follow the current prompts in the Meta Business Help Centre.

Set up your business portfolio with:

- Your Facebook Page and Instagram account
- An ad account owned by your business (not a personal ad account you might lose access to)
- A payment method
- People with the appropriate roles. Give freelancers or agencies partner access rather than sharing logins, and keep ownership yourself.

Enable two-factor authentication for everyone with access. Hacked ad accounts are a real risk and can be difficult to recover.

Step 2: Verify your domain

Domain verification proves you own your website and, at the time of writing, is part of how Meta lets you configure events and edit link previews. Follow the brand safety or domain section of your business settings to add a DNS record or meta tag.

Step 3: Meta Pixel

The Meta Pixel is a piece of code on your website that tells Meta when people view pages and complete actions such as submitting a lead form. It allows Meta to optimise delivery towards people likely to convert and to measure results.

You can install it by:

- Using a partner integration built into your website platform or form tool
- Adding the base code to every page manually
- Using a tag manager

Then set up standard events for the actions that matter, for example `Lead` on a form submission or `Schedule` on a completed booking. At the time of writing, Meta's Events Manager includes a setup tool that can help you configure events without editing code.

Step 4: Conversions API

Browser-based tracking can miss events because of ad blockers, browser privacy features, cookie restrictions and consent choices. The Conversions API (CAPI) sends events from your server or platform directly to Meta. Meta recommends using it alongside the Pixel, with event deduplication so the same lead is not counted twice (by sending a matching event ID from both).

At the time of writing, common options include partner integrations in popular website, ecommerce and CRM platforms, the Conversions API Gateway, and direct developer integration. Choose the simplest option your stack supports.

Step 5: Consent and privacy

Privacy law varies by country. In the European Economic Area and the UK, you typically need valid consent before placing non-essential tracking cookies or similar technologies. Other regions have their own rules (for example several US states and countries such as Brazil, Canada and Australia). Make sure your cookie banner and privacy policy reflect the tools you use, and that your tracking respects visitors' choices. If you collect leads, explain how you will use their data and do not add them to marketing lists without an appropriate legal basis.

Setup checklist

- ☐ Facebook Page and Instagram professional account connected
- ☐ Ad account owned by your business portfolio, with a valid payment method
- ☐ Two-factor authentication on for every admin
- ☐ Domain verified
- ☐ Meta Pixel installed and firing on every page
- ☐ Lead (or equivalent) event firing only on successful form submission
- ☐ Conversions API connected with deduplication
- ☐ Test events checked in Events Manager
- ☐ Privacy policy updated and consent banner working in the regions you target
- ☐ UTM parameters planned for your ad URLs

Instant forms versus landing pages

This is one of the biggest decisions in Meta lead generation.

Instant forms (lead ads)

Instant forms open inside Facebook or Instagram. Fields can be pre-filled from the person's profile, so submitting takes seconds. The advantages are convenience and, often, a lower cost per lead. The disadvantage is that low friction can mean lower intent: people may submit without much thought, or with outdated contact details.

At the time of writing, Meta offers form types that trade volume for intent, such as a "More volume" option and a "Higher intent" option that adds a review step before submitting. You can also add custom questions, conditional logic and a completion screen with a call to action.

Landing pages

A landing page on your website gives you full control over the message, proof and form. The extra step (leaving the app, loading a page) usually means fewer leads at a higher cost each, but those leads have seen more information and made more effort.

How to choose

Situation	Better starting option
Simple, low-commitment offer (quote, callback, guide)	Instant form with one or two qualifying questions
High-ticket or complex service that needs explanation	Landing page

You have limited sales capacity and need fewer, better leads	Landing page or Higher intent form
You need volume and can follow up very quickly	Instant form (More volume)
Your website is slow or not mobile friendly	Instant form while you fix the site
You want to retarget visitors and build website audiences	Landing page

The only fair way to decide is to compare cost per customer, not cost per lead. A form that generates leads at $10 each with a 3% lead-to-customer rate costs $10 / 0.03 = $333.33 per customer. A landing page with $25 leads and a 10% lead-to-customer rate costs $25 / 0.10 = $250 per customer. The cheaper lead was the more expensive customer in this illustrative example.

Designing a form that qualifies

- **Ask only what you need to follow up and qualify.** Name, phone or email, and one or two questions.
- **Use qualifying questions with multiple choice answers.** For example "When are you hoping to start?" with options such as "Within a month", "1 to 3 months", "Just researching". This lets you prioritise.
- **Set expectations on the intro and completion screens.** "We will call you within one business hour from a local number" reduces no-answer rates.
- **Include your privacy policy link**, which Meta requires, and explain how you will contact people.

For landing pages, the website growth and conversion guide covers layout, proof and form design.

Step-by-step: building your first lead campaign

Step 1: Choose the objective

At the time of writing, Ads Manager offers these simplified objectives: Awareness, Traffic, Engagement, Leads, App promotion and Sales. For lead generation, choose **Leads**. Do not choose Traffic just because it looks cheaper: Traffic optimises for clicks, not for people who submit forms.

Meta may offer an automated or "Advantage+" version of the leads campaign, which at the time of writing applies more automation to audience, placements and budget. It can be a reasonable choice, but understand which settings it controls before you launch.

Step 2: Choose the conversion location

Inside a Leads campaign, the ad set lets you choose where the lead happens, for example instant forms, website, messaging apps, calls, or combinations. Pick the one that matches your plan from the previous section.

Step 3: Budget and schedule

You can set budgets at the campaign level (Meta distributes budget across ad sets, previously called campaign budget optimisation and at the time of writing described as Advantage campaign budget) or at the ad set level. For a first campaign with one ad set, either works.

Step 4: Audience

Meta's automation increasingly finds audiences for you. At the time of writing, Advantage+ audience lets you provide optional suggestions (such as age ranges, interests or custom audiences) that Meta treats as signals rather than strict limits, while some settings like location and minimum age remain controls. You can usually switch to original audience options if you need stricter limits.

Practical guidance for beginners:

- **Location:** target only where you can serve. For local businesses, use a radius or specific postcodes where allowed, and check whether you are reaching people living in or recently in that area.
- **Age:** set a minimum age only where it is legally or commercially essential (for example, age-restricted products).
- **Interests and demographics:** start broad and let the creative filter. Stacking narrow interests often raises costs without improving lead quality.
- **Custom audiences:** website visitors, customer lists (where you have an appropriate legal basis to use them) and people who engaged with your Page or videos can be used for retargeting or as signals.
- **Exclusions:** exclude existing customers and recent leads where possible, so you do not pay to reach people already in your pipeline.

Step 5: Placements

Advantage+ placements (automatic placements) let Meta show ads across Facebook, Instagram, Messenger and the Audience Network where it predicts the best results. This usually gives the delivery system the most room to find cheaper results. If you notice poor-quality leads from a specific placement in your breakdown reports, you can test excluding it. Make sure your creative works in vertical (9:16), square (1:1) and feed (4:5) formats. The social media image resizer can help prepare different sizes.

Step 6: Optimisation and bidding

Optimise for the event closest to real value that you can generate in reasonable volume. For instant forms this is usually leads. At the time of writing, Meta also offers optimisation for "conversion leads" when you send lead quality data back from your CRM, which can help Meta find people more likely to become customers rather than just submit forms. Check current requirements.

Start with the default bid strategy (highest volume or lowest cost). Add a cost per result goal or bid cap only after you understand your typical costs.

Step 7: The ads

Create at least three distinct ad concepts in your first ad set, not three near-identical variations. Distinct concepts help the system and you learn what resonates. See the next section for creative guidance.

Step 8: Tracking parameters

Add UTM parameters to landing page URLs so your analytics tool can attribute visits. Meta supports dynamic URL parameters that fill in the campaign, ad set and ad names automatically; check the current list in Ads Manager. Use the UTM link builder to keep naming consistent across channels.

> **Free tool: UTM Link Builder**
> Try it free in your browser, no sign-up needed.
> https://freetoolshelf.com/marketing-tools/utm-link-builder/

Creative that attracts the right leads

The creative is your targeting

With broad audiences, your creative decides who engages. A video that opens with "Homeowners in Brisbane with a leaking roof" attracts a very different crowd from a generic stock photo of a smiling family. Be specific about who the offer is for and what problem it solves.

A simple structure for lead ads

1. **Hook (first one to three seconds or the first line):** name the audience or the problem.
2. **Proof:** show real work, a real person, a process, or a result you can substantiate.

3. **Offer:** what they get by submitting, stated concretely.
4. **Qualifier:** who it is not for, or what it involves, to reduce low-quality leads.
5. **Call to action:** what happens next and how fast.

Example primary text (illustrative): "Planning a kitchen renovation in Leeds this year? Get our free price guide with real project ranges from small refreshes to full rebuilds. Ideal if you own your home and want to start within 6 months. Tap Get Guide and we will email it straight away."

Formats to test

- **Short vertical video** of the owner or technician explaining the offer in plain language.
- **Before and after images** (make sure these are genuine and comply with policies for your industry).
- **Carousel** showing steps of your process or several projects.
- **Simple text-on-image** stating the offer clearly.

Authentic, clearly lit phone footage often performs as well as polished productions for local services, but test it rather than assuming.

Creative fatigue

As the same people see an ad repeatedly, response can decline. Watch frequency and cost per lead trends over time. When cost per lead rises steadily and frequency is climbing, introduce new concepts. Keep a simple library of hooks, visuals and offers so you can refresh efficiently. The AI social media caption generator can help draft variations to edit, and our AI marketing productivity guide covers efficient creative workflows.

Following up: where leads are won or lost

Speed

A person who submitted a form a few minutes ago still remembers you and is often still on their phone. A day later, they may have spoken to competitors or lost interest. Aim to respond as quickly as your business can reliably manage, ideally within minutes during business hours, and set clear expectations for out-of-hours enquiries.

Getting leads out of Meta quickly

At the time of writing, instant form leads can be downloaded from your Page's lead centre or Meta Business Suite, or sent automatically to a CRM or email tool through Meta's integrations or a connector. Manual downloads are slow and error prone; leads can sit for hours. Check how long

Meta keeps lead data available for download, and move it to your own system promptly.

A simple follow-up sequence

An illustrative sequence for a local service business:

Timing	Action
Immediately	Automated SMS and email confirming receipt, with your name and what happens next
Within 5 to 15 minutes (business hours)	Phone call from a team member
If no answer	Text: "Sorry we missed you, when is a good time to call?"
Same day, later	Second call attempt
Day 2	Email with useful information (pricing guide, examples, FAQs)
Day 3 to 5	Final call attempt and a message offering to book a time online
Ongoing	Occasional helpful emails for those not ready yet, with an easy way to opt out

Make sure your messages comply with the rules on calling, texting and emailing in your country (for example consent rules for marketing SMS and email, calling hour restrictions and do-not-call registers).

Doing this by hand is hard to sustain. A CRM that captures leads from Meta automatically, sends instant confirmations, alerts your team and runs the follow-up sequence can make the difference between a lead that is contacted in minutes and one that is forgotten.

> **Want this to run automatically?**
> A CRM with built-in automation, such as GoHighLevel, can capture leads, send follow-ups and reminders, and track your pipeline in one place. Everything in this guide can also be done manually or with other tools. Some links on our site are affiliate links.
>
> Read our GoHighLevel overview

For a detailed approach, see the lead capture and follow-up guide and the CRM automation blueprint.

Qualify and record outcomes

Record the outcome of every lead: contacted or not, booked or not, showed or not, won or lost, and the reason if lost. Without this, you will judge campaigns only on cost per lead, which can reward the campaigns producing the worst leads. A structured pipeline, covered in the sales pipeline setup guide, makes this routine.

Nurture those not ready yet

Many people who submit a lead form are researching for the future. A short series of genuinely helpful emails or messages (answers to common questions, examples of past work, seasonal reminders) keeps you front of mind without pressure. Automating this nurture sequence means you stay in touch even when you are busy with current customers. The appointment automation guide shows how to connect nurture messages to online booking and reminders.

Reading results and optimising

The learning phase

When you launch or significantly edit an ad set, Meta's delivery system goes through a learning phase while it explores who responds. At the time of writing, Meta says an ad set generally needs around 50 optimisation events within about a week to exit learning. Performance is often less stable during this period. Avoid frequent significant edits (budget jumps, audience changes, new optimisation events), which can restart learning.

If your budget cannot realistically produce that many events, consider consolidating ad sets rather than splitting budget thinly.

Worked example (illustrative): With an expected cost per lead of $20, reaching 50 leads in a week requires about 50 x $20 = $1,000 per week, or about $1,000 / 7 = $142.86 per day. If your budget is $40 a day, one ad set is far more sensible than four ad sets of $10 each.

Metrics to watch in order

1. **CPM:** how expensive it is to reach your audience. Rises with competition and seasonality.
2. **Hook rate or thumb-stop rate:** for video, the proportion of impressions that watched the first few seconds. Indicates whether your opening works.
3. **Click-through rate (link):** whether the ad compels action.
4. **Form or landing page conversion rate:** whether the offer and form work.
5. **Cost per lead:** the combined outcome of the above.
6. **Contact rate, booking rate, close rate:** from your CRM or spreadsheet.
7. **Cost per customer and return on ad spend:** the numbers that decide profitability. The ROAS calculator helps here.

Diagnosing common patterns

Symptom	Likely cause	What to try
High CPM	Narrow audience, competitive season, low ad quality signals	Broaden audience, refresh creative, check ad relevance diagnostics
Low CTR	Weak hook or unclear offer	New opening lines and visuals, clearer offer
Good CTR, few leads	Landing page or form friction	Shorten form, speed up page, match message
Cheap leads, few customers	Low intent, weak qualification, slow follow-up	Higher intent form, qualifying questions, faster response
Rising cost per lead over weeks	Creative fatigue	New concepts, not just new colours
Many fake or wrong numbers	Very low friction form	Higher intent form type, SMS verification in your follow-up, clearer qualifiers

Testing properly

Test one variable at a time where possible (for example, two hooks with the same offer), and give each variant enough spend to produce meaningful results. If you expect a $20 cost per lead, a variant that spent $30 and produced no leads has not yet had a fair test. Meta also offers A/B testing tools in Ads Manager at the time of writing.

Scaling carefully

When cost per customer is consistently below break-even:

1. **Increase budget gradually,** for example by 15% to 20% every few days, and watch cost per lead and lead quality.
2. **Add new creative concepts** rather than duplicating the same ads.
3. **Expand your geography** to areas you can serve well.
4. **Build retargeting** for people who visited your site or engaged but did not submit.
5. **Feed quality data back** through the Conversions API or CRM integration so optimisation improves.

Watch the marginal cost, not just the average. **Worked example (illustrative):** At $1,200 a month you get 80 leads ($15 each). At $1,500 you get 92 leads (average $16.30). The extra $300 bought 12 extra leads, a marginal cost of $300 / 12 = $25 per lead, which is above the $21 break-even from the earlier example, even though the average still looks fine.

Common mistakes and how to avoid them

Optimising for the wrong objective

Traffic or engagement objectives produce cheap clicks and likes, not leads. Use the Leads objective (or Sales for ecommerce) with a properly tracked event.

Judging by cost per lead alone

Cheap leads that never answer the phone are expensive. Track outcomes and compare cost per customer.

Broken or duplicated tracking

A Lead event that fires on page load instead of successful submission, or Pixel and Conversions API events without deduplication, can inflate results and confuse optimisation. Test using Events Manager's test tools.

Over-segmenting small budgets

Many small ad sets each struggle to exit learning. Consolidate.

Ignoring Special Ad Category rules

Running housing, employment, financial or political ads without the correct category can lead to rejected ads or account restrictions. Declare the category and plan for the targeting limits.

Slow or inconsistent follow-up

Leads left for a day often go cold. Automate confirmations and alerts, and set response-time goals.

Using generic stock creative

Stock images rarely say anything about your business. Show real people, real work and a specific offer.

Making unrealistic promises

Exaggerated claims can breach Meta's policies and consumer law, and they attract the wrong leads. Be specific and honest.

Not protecting the account

Use two-factor authentication, keep ownership of the business portfolio, and grant partner access rather than sharing logins.

Glossary

Ad set: The level in a Meta campaign where you set audience, placements, budget (if not at campaign level), schedule and optimisation.

Advantage+: Meta's family of automated features for audiences, placements, creative, budgets and campaigns.

Business portfolio: The container in Meta's business tools that owns your Pages, ad accounts, Pixels and permissions (formerly Business Manager).

Conversions API (CAPI): A way to send events from your server or platform directly to Meta, complementing the Pixel.

CPM: Cost per 1,000 impressions.

Cost per lead (CPL): Ad spend divided by the number of leads.

Custom audience: An audience built from your own sources, such as website visitors, customer lists or people who engaged with your content.

Deduplication: Matching events sent from both the Pixel and the Conversions API so each is counted once.

Frequency: The average number of times each person saw your ad.

Instant form: A lead form that opens inside Facebook or Instagram, often pre-filled.

Learning phase: The period after launch or significant edits when Meta's delivery system explores how to deliver your ad set.

Lead-to-customer rate: The percentage of leads that become paying customers.

Lookalike audience: An audience of people similar to a source audience you provide.

Meta Pixel: Website code that sends browser events to Meta for measurement and optimisation.

Nurture sequence: A series of messages to leads who are not ready to buy yet.

Placement: Where an ad appears, such as Facebook Feed, Instagram Stories or Reels.

Special Ad Category: A declaration required for certain ad types (such as housing, employment, financial products and services, and social issues, elections or politics) that restricts targeting.

UTM parameters: URL tags identifying the traffic source, medium and campaign in analytics.

Next steps

1. Calculate your break-even cost per customer and cost per lead with the lead conversion calculator and customer acquisition cost calculator.
2. Complete the setup checklist: business portfolio, domain, Pixel, Conversions API and consent.
3. Decide between instant forms and a landing page using the decision table, and design a qualifying form.
4. Launch one Leads campaign with one consolidated ad set and three distinct creative concepts.
5. Put a fast, automated follow-up and nurture process in place before the first lead arrives, using the lead capture and follow-up guide.
6. Review cost per customer weekly, then add search demand capture with the Google Ads beginner's guide.

Free tool: Customer Acquisition Cost Calculator

Try it free in your browser, no sign-up needed.

https://freetoolshelf.com/marketing-tools/customer-acquisition-cost-calculator/

Keep learning

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