How to launch a lead generation campaign with Facebook Lead Ads

Last Updated / Reviewed: July 30th, 2021
Execution Time: *~1-2h*

Goal: To launch a Facebook Lead Ads campaign and integrate it with your email service provider (ESP).

Ideal Outcome: Your Facebook Lead Ads campaign is collecting leads for you on autopilot and those leads are being nurtured by your email marketing workflows.

Prerequisites or requirements:

- You need a Facebook Ads Account and a Business Page. If you don't have one yet you can follow SOP010 - Create a Facebook Ads Account using Business Manager.
- This SOP covers a detailed process to integrate Facebook Lead Ads with MailChimp, this chapter of the SOP assumes you already have a MailChimp account. If you are using any other ESP that integrates with Zapier the process could vary slightly. You can find a list of tools that integrate with Zapier, here.

Why this is important: Having a scalable, easy to setup and maintain, lead generation campaign could make or break your business.

Where this is done: In Facebook Ads Manager, Business Manager, and your current ESP provider.

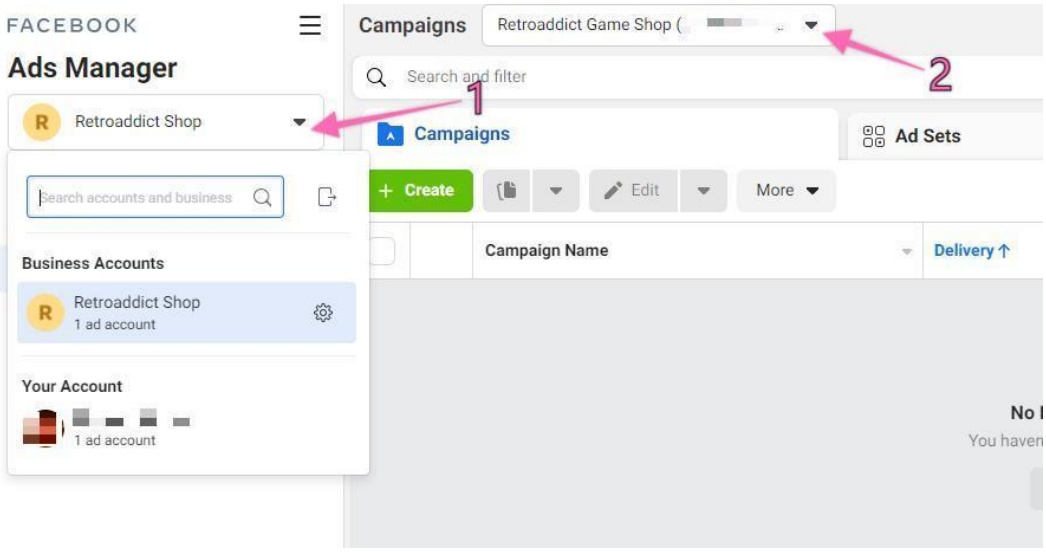
When this is done: Every time you want to launch a new Facebook Lead Ad campaign.

Who does this: The person responsible for Paid Advertising or Email Marketing.

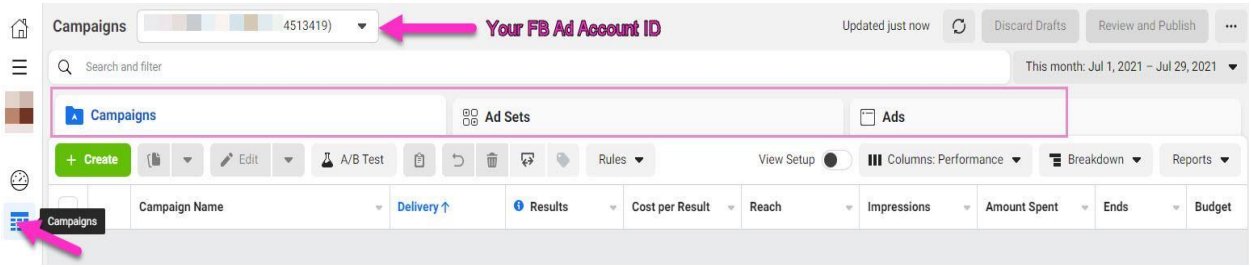
☐ Setting up your Campaign

1. Log into your Ads Manager guided creation panel here.

2. If you're managing multiple Ad Accounts and Business Managers make sure you've selected the right ones on the top header.

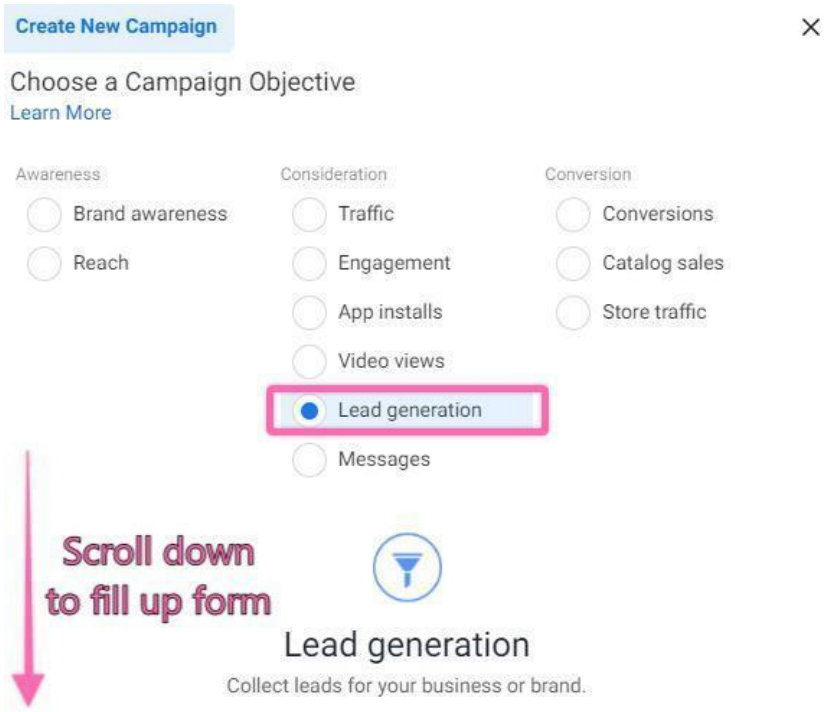


Note: *To prevent confusion, your FB Manager Campaign main dashboard has 3 tabs: Campaigns, Ad Sets and Ads Tab:*



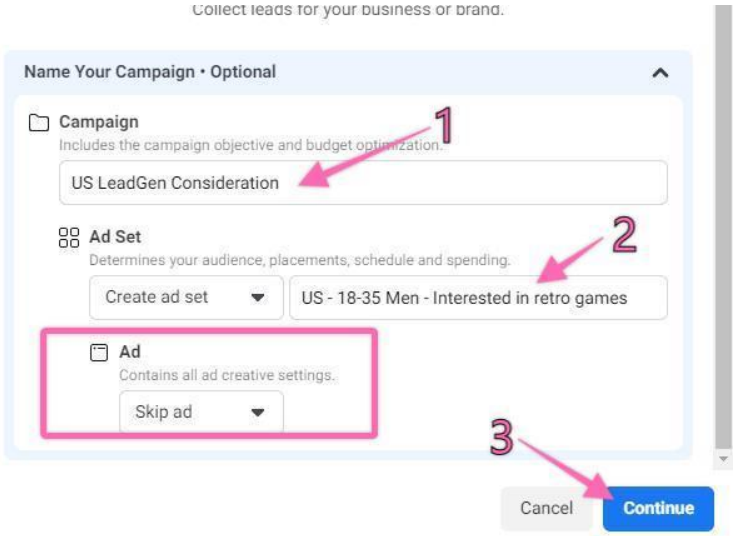
3. Click the '+ Create' button, under the 'Campaigns' tab:

4. Under ‘Choose a Campaign Objec tive’ → ‘Consideration’, select ‘Lead Generation’:

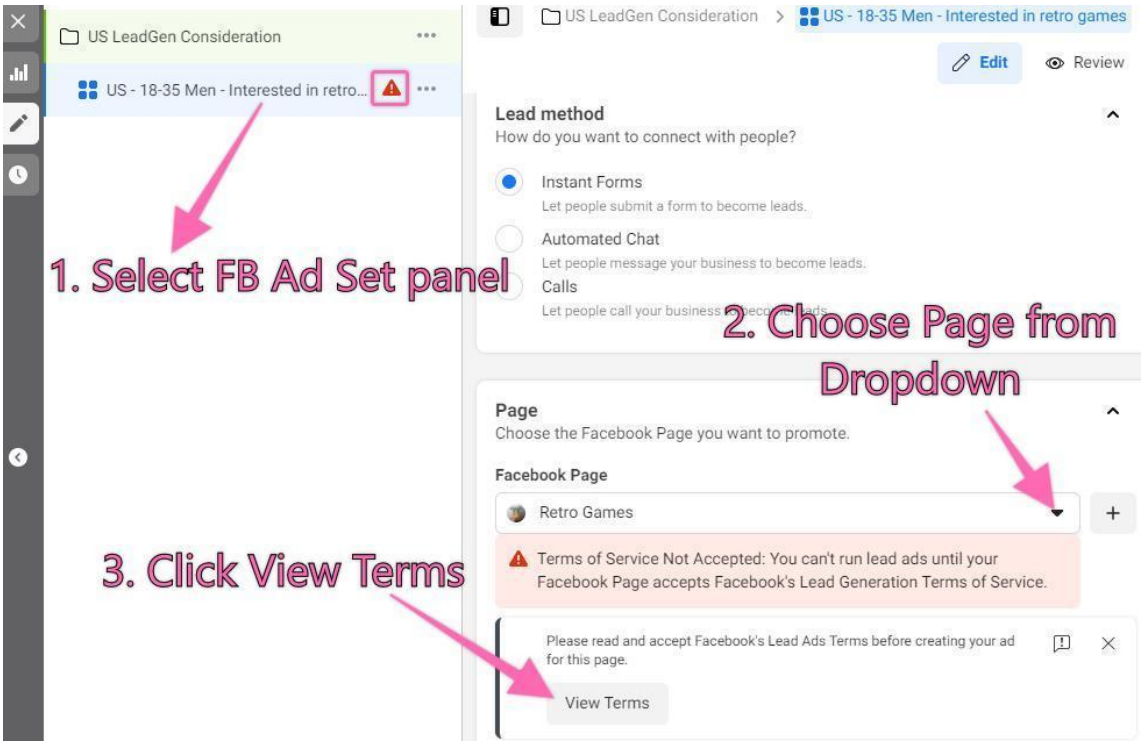


5. Scrolling down, you will need to rename your campaign according to your naming convention. In naming your ‘Ad Set,’ the recommended Facebook template is ‘Country – Age Group – Gender – Interest’.

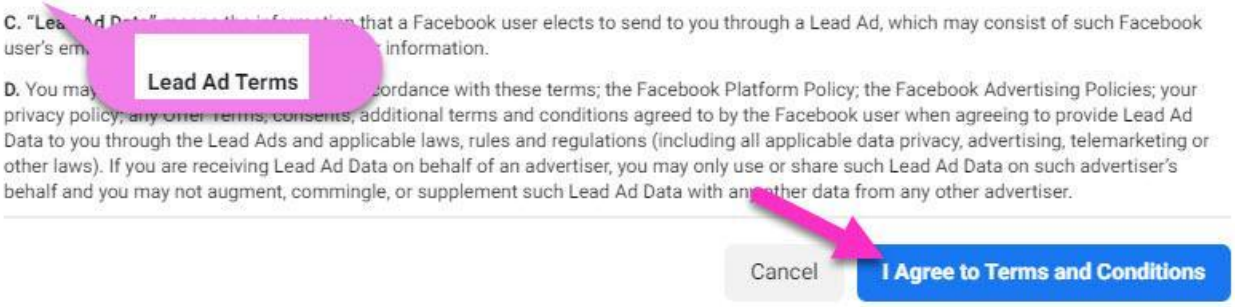
   ***Note**: Your naming convention will vary depending on how your Ad Account is structured.*



6. After clicking ‘Continue,’ you will be redirected to your Facebook Ad Campaign dashboard. You will immediately see an error prompt ⚠ in your ‘Ad Set’ dashboard. Select your ‘Ad Set’ page, select the correct Facebook page in the dropdown, and click on ‘View Terms’ to accept ‘Lead Ad Terms’ for the Facebook page you want to promote.



7. Read the ‘Lead Ad Terms’ and click ‘I Agree to the Terms and Conditions’ if you have no objections.



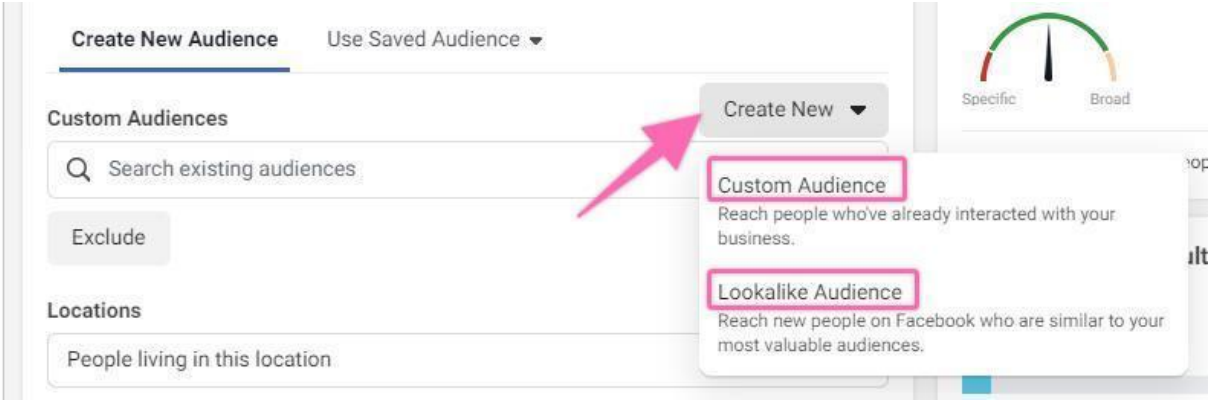
☐ Setting up your Ad Set

1. On the ‘Ad Set’ setup, scroll down to ‘Audience’:

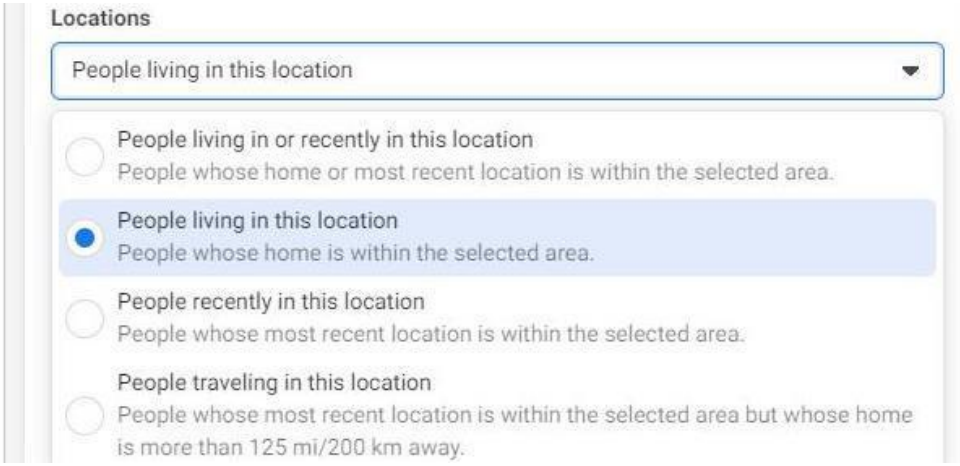
a. ***Note**: Your target audience will vary depending on your Ad Account structure and strategy, ideally, when setting up your ads you should already know beforehand how you want to set up your targeting, but you can also do so at this point.*
b. ***Note 2:** If you are unsure on who your target audience is, refer back to your customer avatars, and try to target their interests if you have already defined them.*
c. ***Note 3:** If you want to use a previously built audience, you can do so by clicking 'Use a Saved Audience' dropdown.*

Custom Audiences (optional): If you already have custom audiences created you can select them in the dropdown.

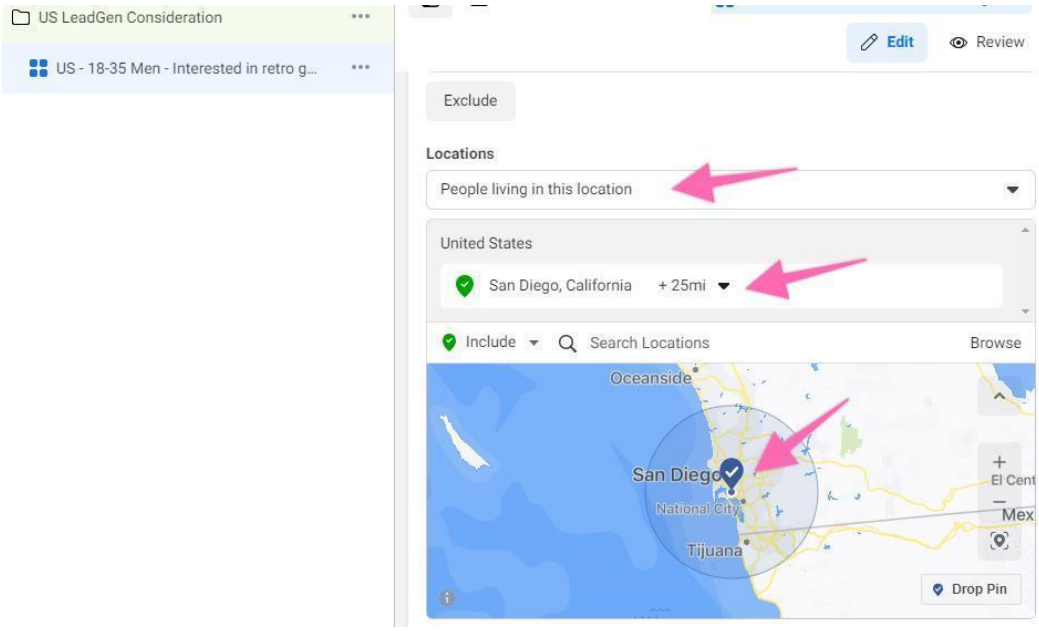
- ***Note:** If you want to target users based on demographics, location, language, and other user-specific traits alone you can leave this blank.*
- ***Note 2:** If you don't have lookalike audiences and would like to create one, you can follow [SOP031 - How to create a Lookalike audience on Facebook](); *



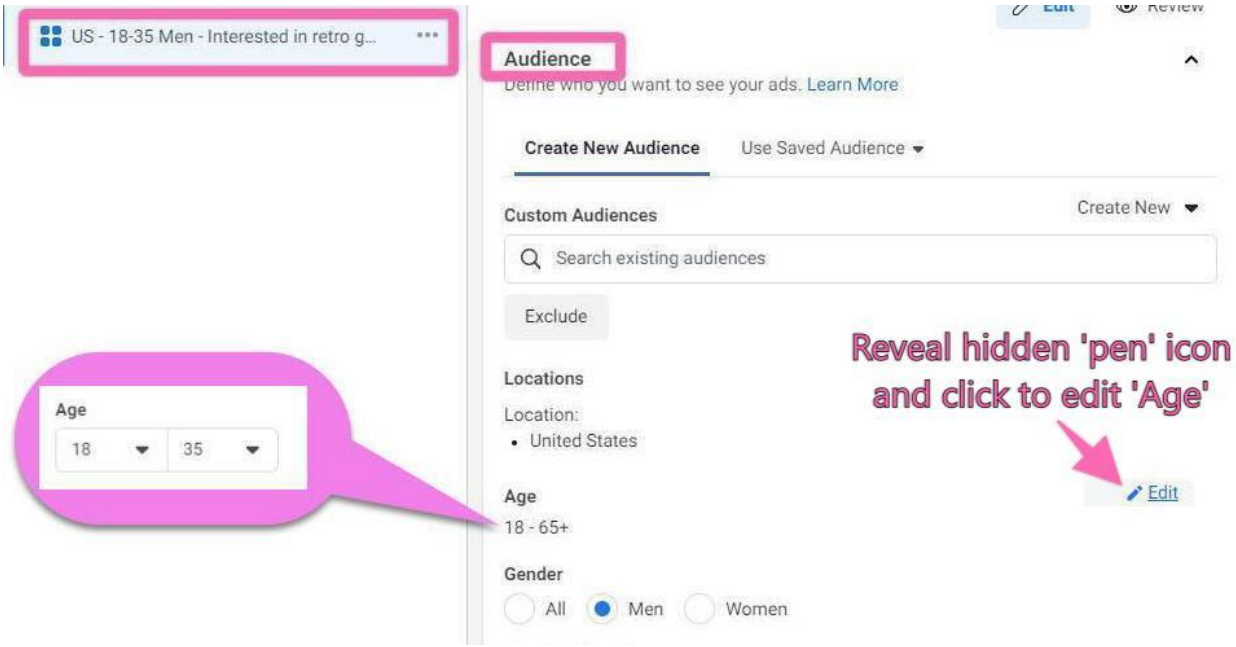
Locations: Select the location settings that you believe will match your target audience.



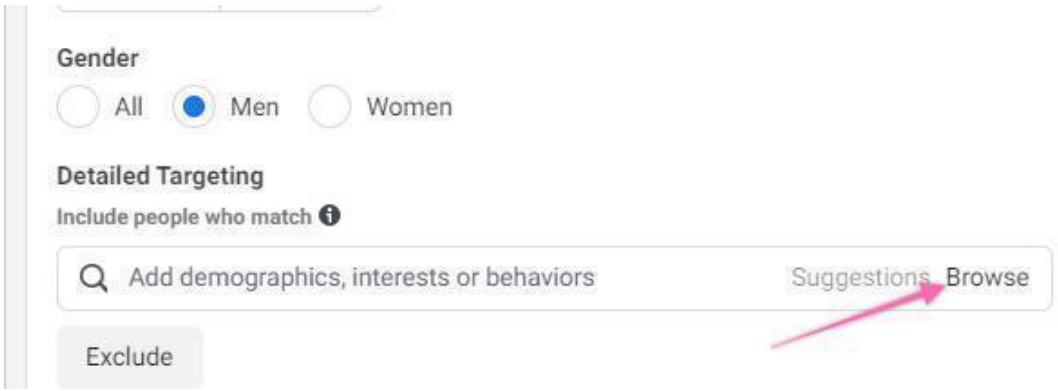
Note: *You can further narrow down your Audience location by searching a specific city or dropping a 'pin' in the map.*



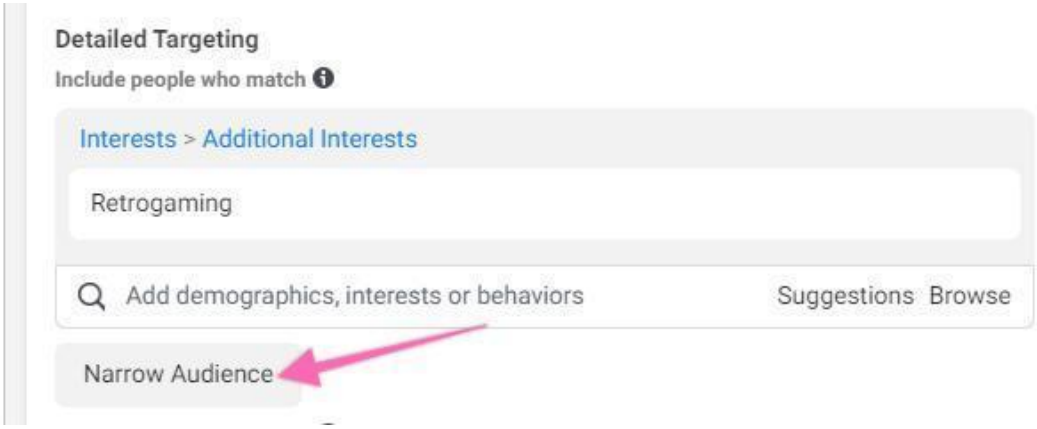
Age, Gender and Languages: Select the demographics that you believe will match your target audience.



Detailed Targeting: Select the Demographics/Interests/Behaviors that you believe will match your target audience. Click 'Browse' to start selecting:

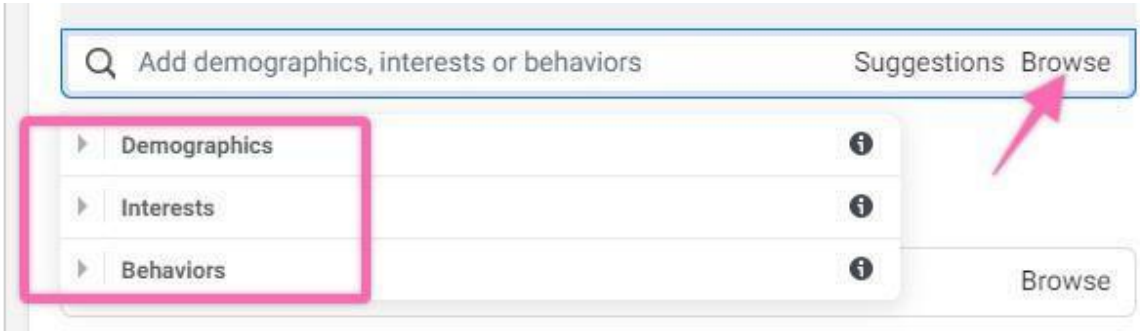


- ***Note**: When selecting these, be careful not to go too broad. When selecting multiple Interests/Demographics/Behaviors Facebook will deliver your ad to anyone that matches at least one of them. If you want to target audiences that match multiple groups at the same time you can also do so, after you have selected your first group a new 'Narrow Audience' link will appear below it and will allow you to select a new demographic/interest/behavior that you want your audience to also belong to.*

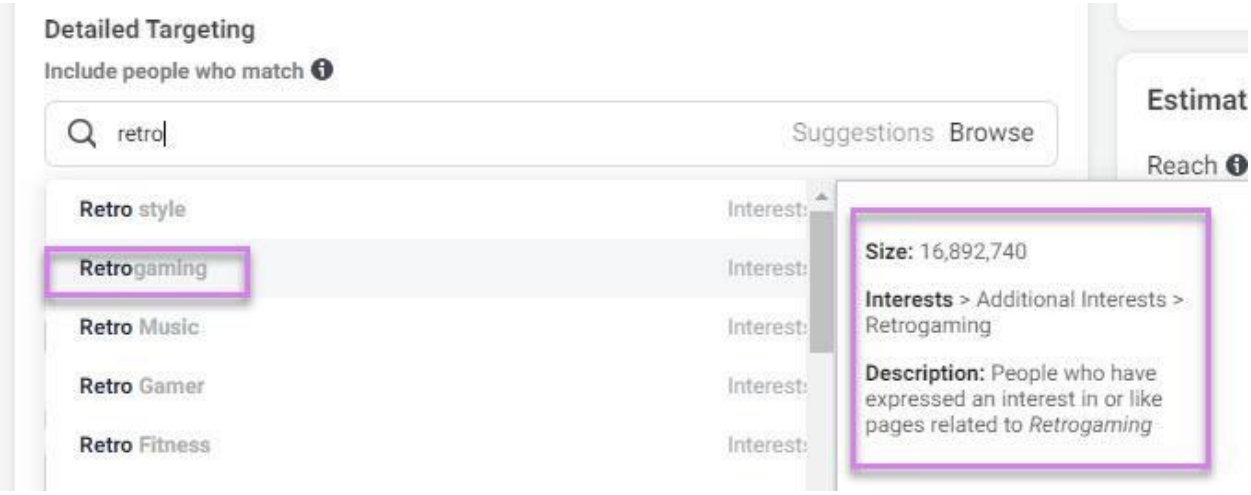


Aim at being as specific as possible while not getting overly specific.

> ***Example**: If you are advertising for a golf course, you might want to only pick "Golf" instead of just "Sports" or even tightly related sports. The exception to this case is, if your Ad Budget is too big for your audience, or if your Audience after your selections is too small.*



- ***Note 2:** You can also search demographics, interests or behaviors, by typing them in the search box:*

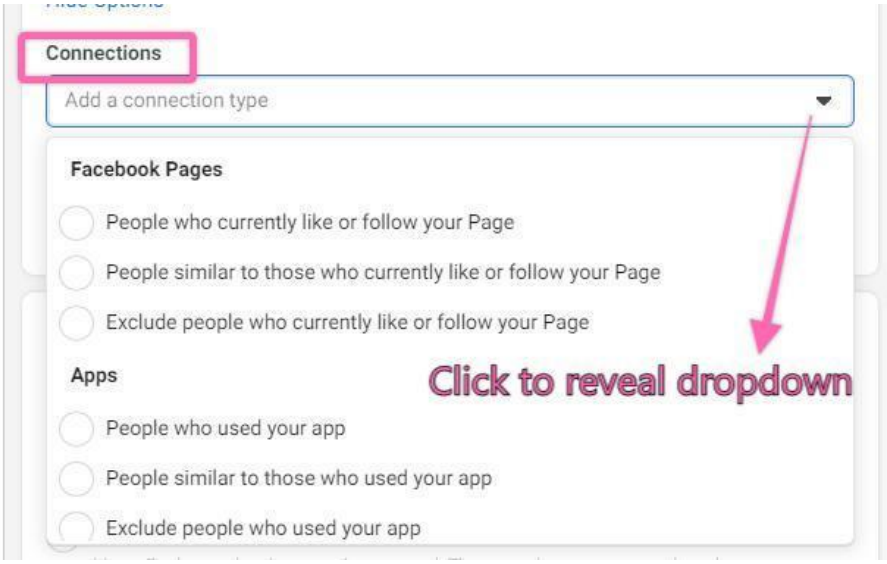


Exclude People: You can use exclusion groups if you don't want to target specific groups.

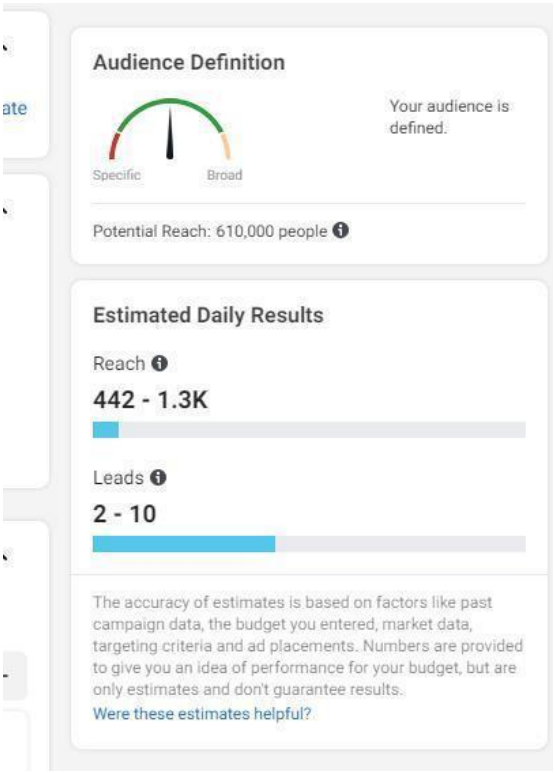
- ***Example:*** *you already have another Ad Set targeting that group, or you've already tested that group in the past and realized it doesn't perform well with your offer)*
- ***Note****: If you are not sure, leave blank.*

Connections: You can use this feature to reach people that have a specific kind of connection with your Page, App or Event.

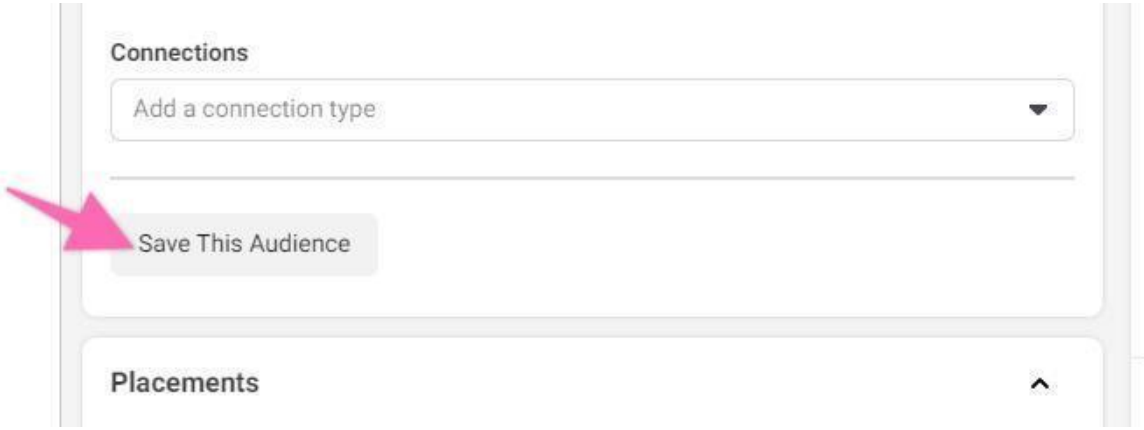
- ***Note:*** *If you are not sure, leave blank.*



8. Look at the right sidebar and see the ‘Audience Definition',’ Reach,’ and ‘Estimated Daily Results’ if it looks good to you. If not, you can continue to adjust items in ‘Detailed Targeting.’

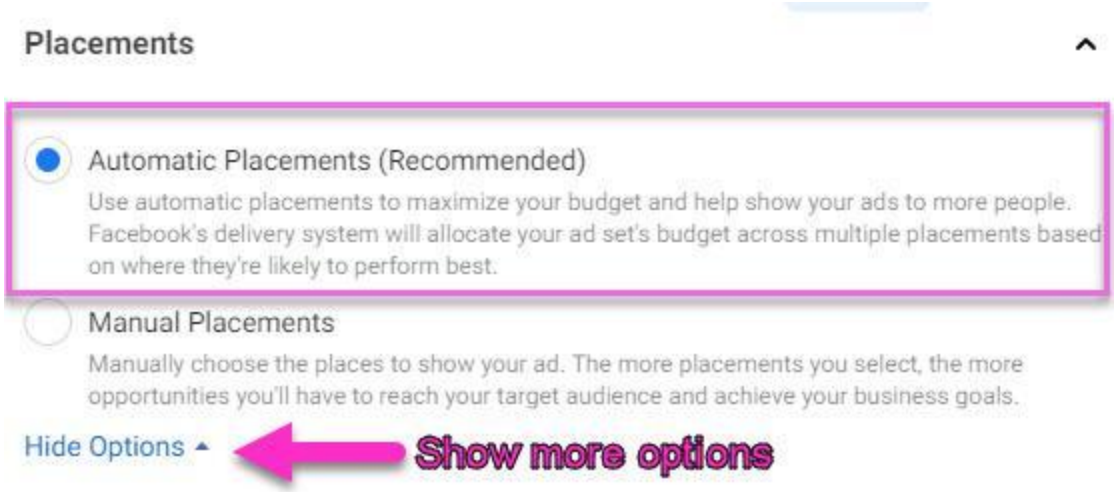


9. If you are satisfied, click ‘Save This Audience’:

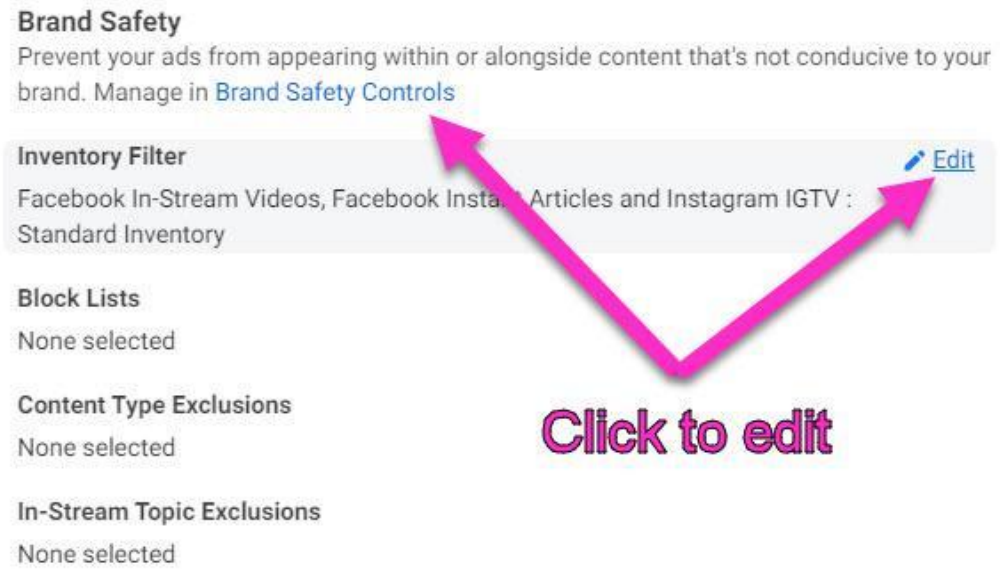


10. You will get to see the summary of the first 'Saved Audience' of your Facebook page. Name it according to your naming convention:
    - ***Note:*** *If you don't have a naming convention you can use [country]-[location]-[language]-[traffic type]-[age range]-[gender]-[audience type]-[audience specifics]*
        i. *Traffic type:*
            1. ***Cold****: If this audience's goal is to reach people that have never heard about you.*
            2. ***Warm****: If this audience's goal is to reach people that have already heard about you before and might have performed some kind of action as well before. (e.g.: left their email address)*
            3. ***Hot****: Leads that have already committed to you in some way. (e.g.: a purchase)*

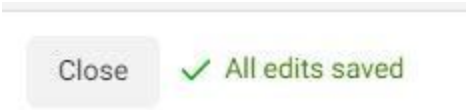
11. Select “Automatic Placements”.



- ***Note**: You can also customize Automatic Placements by clicking “Show More Options”, you might want to start doing so as you start to optimize your campaign and analyze your results. You can set ‘Brand Safety Controls’ to prevent your ads from appearing in content that’s not conducive to your brand. You can set inventory filters, block lists, content type exclusions and in-stream topic exclusion. You can click the hidden ‘Edit’ pen icon on each ‘control’ or just click ‘Brand Safety Controls’ to manage everything in the ‘Brand Safety’ dashboard.*

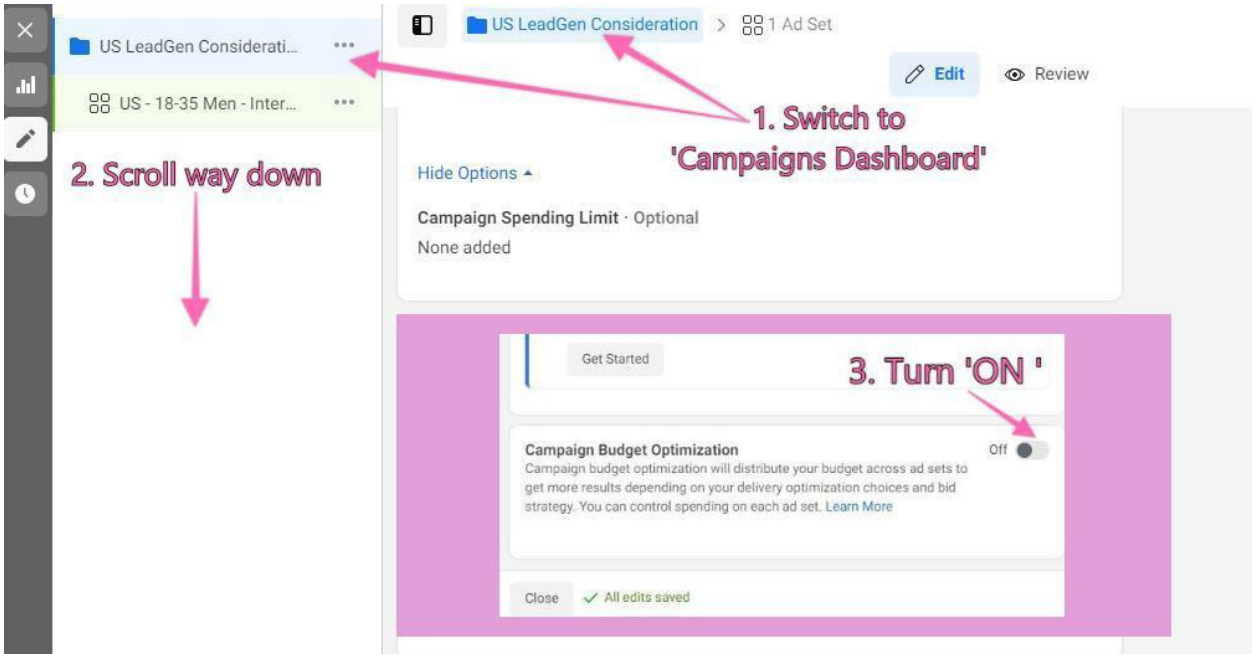


12. All changes made will be automatically saved in drafts, as indicated by the green check bottom left portion of your current dashboard.

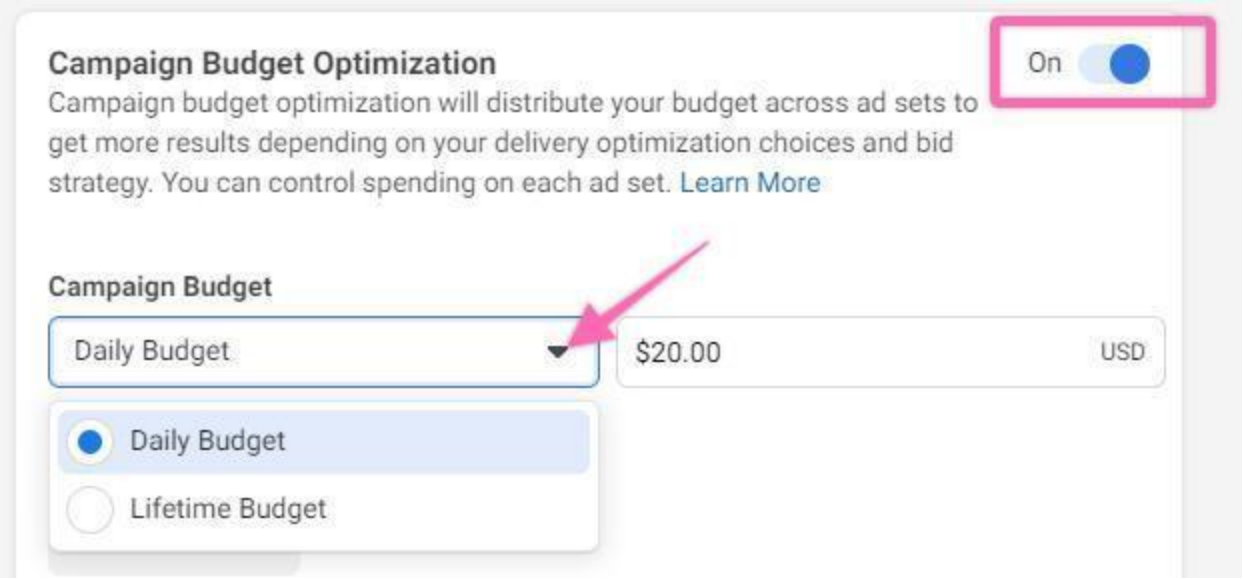


☐ Setting up your Budget, Schedule, Optimization & Delivery

1. To activate ‘Budget and Schedule’, you must turn ‘ON’ the ‘Campaign Budget Optimization.’ To do that, you need to switch to your ‘Campaigns’ dashboard, scroll way down and turn ON the switch under ‘Campaign Budget Optimization’ until it turns ‘blue’ (it is OFF by default).

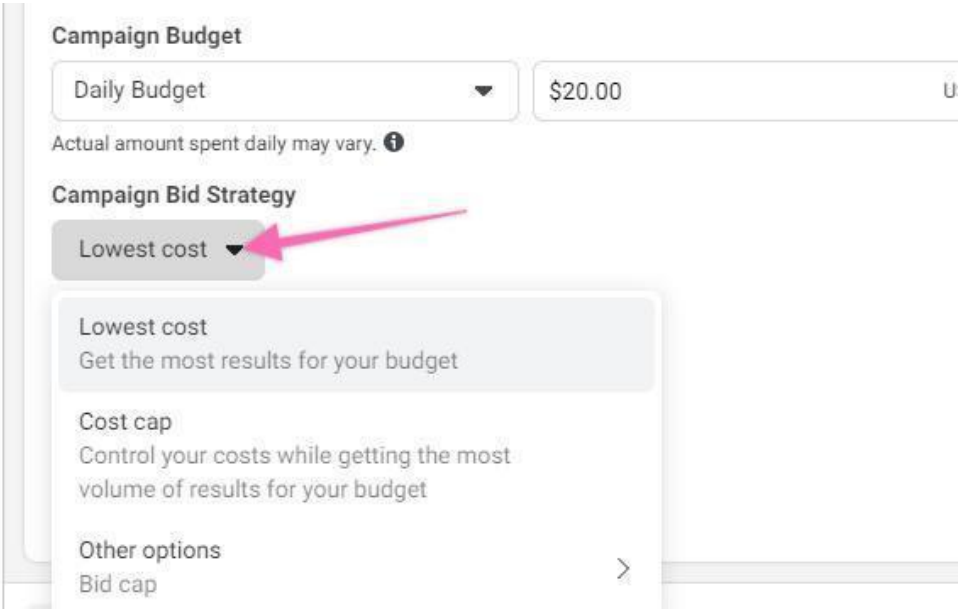


2. Set up your Budget and Schedule:
    - Budget:



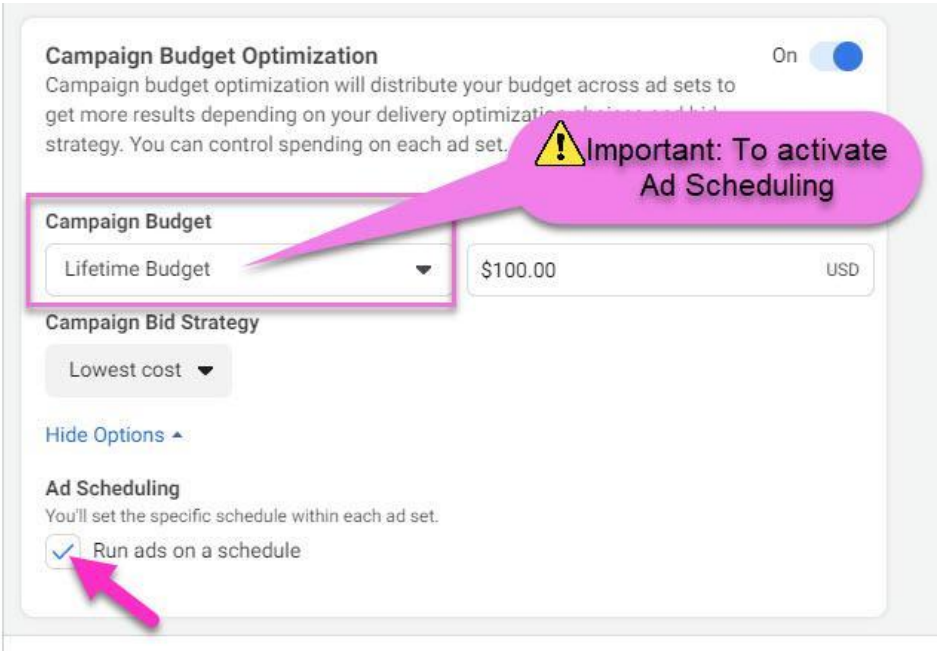
- Select *"*Daily Budget*"* if you want to have an ongoing campaign.
- Select "Lifetime Budget" if you want to limit your campaign to a specific budget instead.
    i. ***Note**: If you only have 1 campaign (which is the case if you follow this SOP from beginning to end) this will be how much you're willing to spend on this campaign.*
    ii. ***Important**: You can't change this after your Ads are running; You can always duplicate your campaign, but you should avoid that if possible.*
    iii. ***Example**: If you want to spend $20 per day on this Facebook Lead Ads campaign, you will have 'Daily Budget: $20'.*

- Bid Strategy:
  ***Note:** Bid strategy options will appear based on your 'Campaign Budget' strategy and amount. You can read more about it here.*

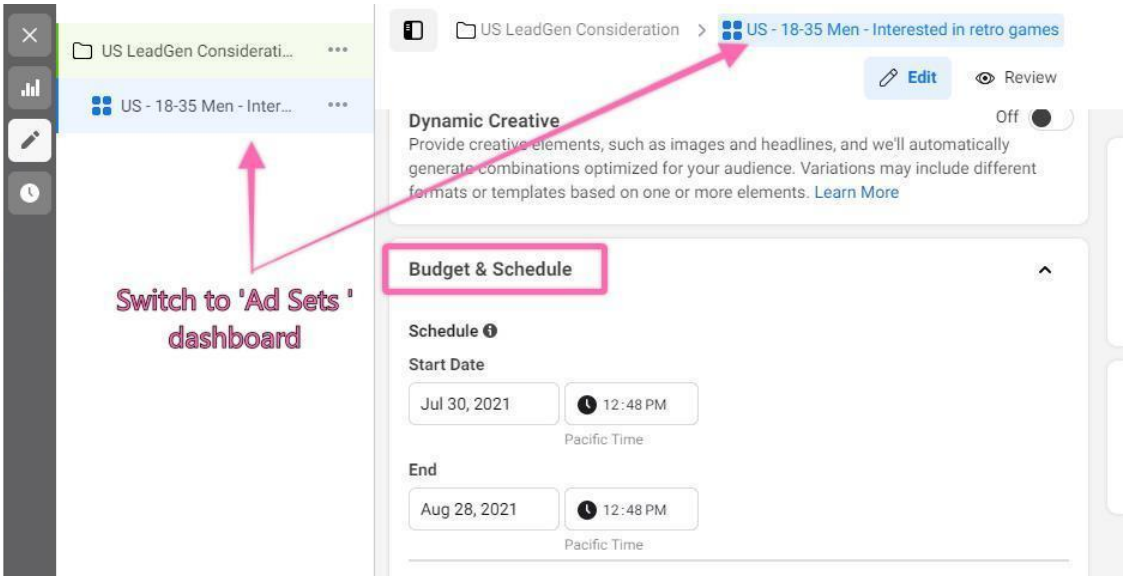


- You can select '**Lowest Cost**' when you want to maximize delivery and conversions from your budget. For this SOP, this is the best option because we want friend referrals in exchange for a $20 discount coupon before a purchasing of our retro console or game.
- '**Highest Value**' when we want to focus on high value purchases. In this case, we can use this option when we want the sale of our retro consoles to be prioritized.
- '**Bid Cap**' when you want to set the maximum bid across auctions, rather than allowing Facebook to bid automatically. Bid cap is meant for advertisers who have a strong understanding of predicted conversion rates and can calculate the right bid.

- Ad Scheduling:
  Note: *You can only run 'Ad Scheduling' if you have chosen 'Lifetime Budget' in the 'Campaign Budget' dropdown.*



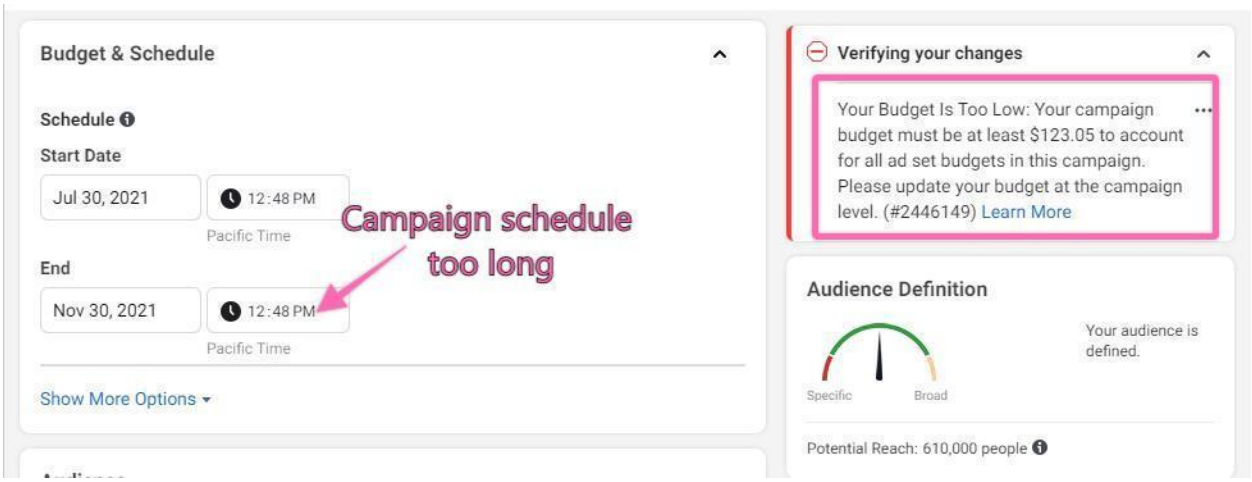
- Put a 'check' on 'Run ads on a schedule.' Then, you need to switch to the 'Ad Sets' dashboard to set the time and day you want your ads to appear.



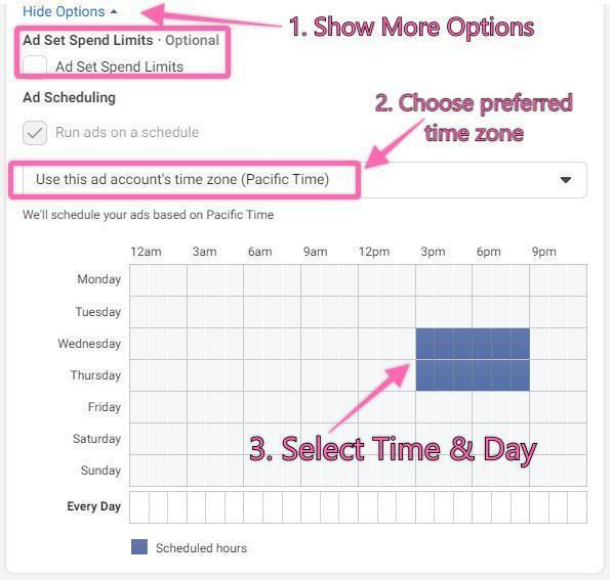
- In the 'Ad Sets' dashboard, scroll down to 'Budget & Schedule.' If you put a check mark on 'Run ads on a schedule' in the 'Campaign' dashboard, you will see an 'End' date. If you are on a Daily Budget campaign, you will just see a 'Start Date.'
- Select your start and end date.

- ***E.g.:*** *You are collecting leads for an event that will happen in a few days and it doesn't make sense to keep your campaign going after the end date.*

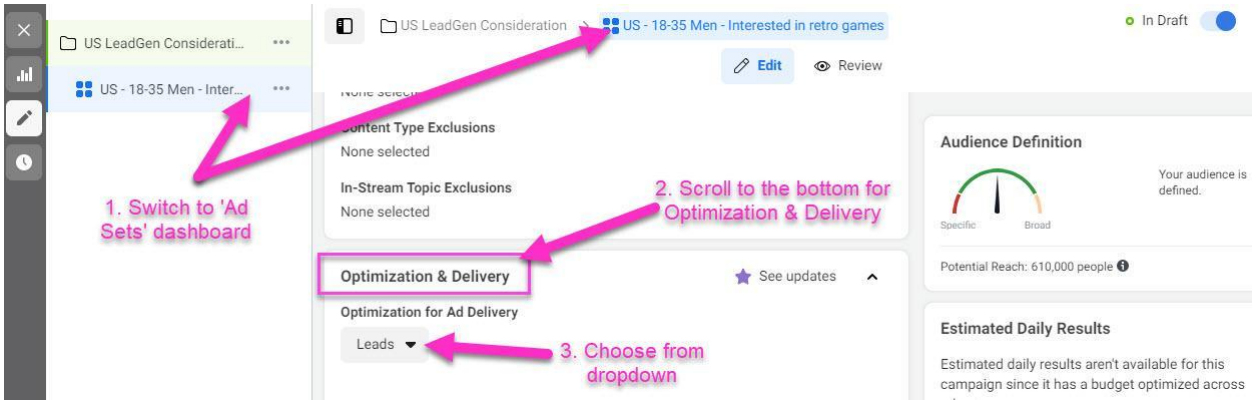
- Take note of errors suggested by Facebook on the right sidebar. For example, if you want to extend your ad schedule to November 2021, you will need to increase your budget.



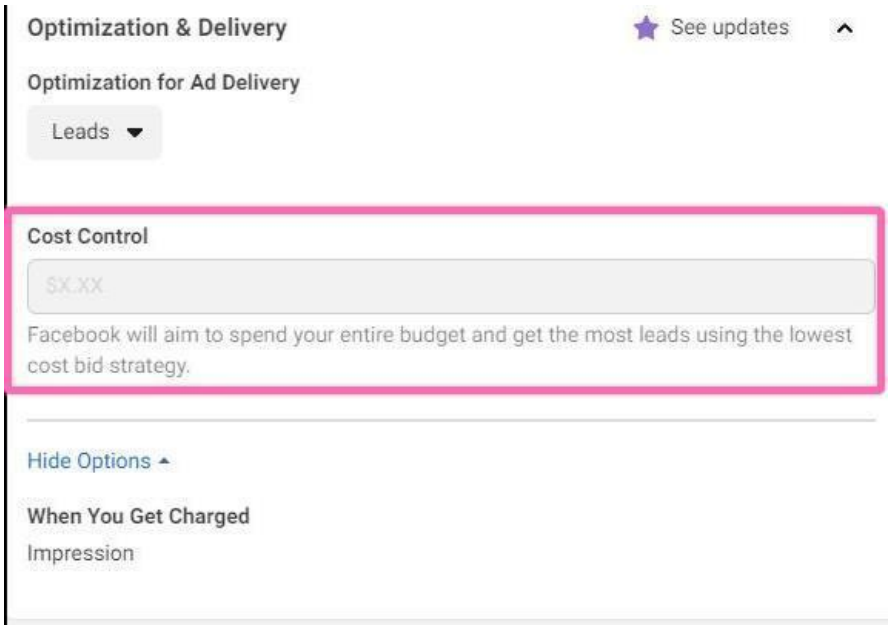
- Under 'Show More Options', you can:
  - Set Ad Spend Limits (optional)
  - Choose your Ad account time zone or the ad viewer time zone (**E.g.**: If you are setting ads for a New York audience, you might want to schedule based on their time zone).
  - Choose the time and day of the week you want your ads to appear (**E.g.**: If you do not want your ads to appear at 3 AM on a Sunday).



- Optimization & Delivery:
  This is found scrolling on the bottom part of the 'Ad Set' dashboard. Click the Leads dropdown and choose how you want to optimize the delivery of your ad.



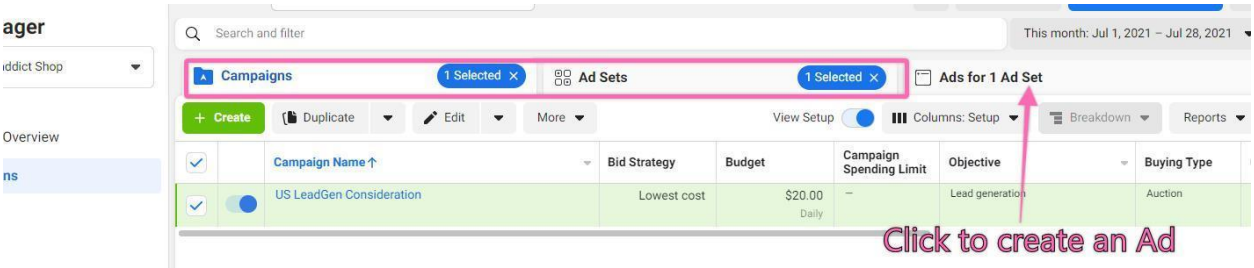
  - For the maximum number of leads, choose **Leads.**
  - For the highest quality of leads, choose **Conversion Leads**.
    - You need to install a Facebook Pixel (SOP 005) and configure Facebook Conversion Events (SOP 098).
  - You cannot edit 'Cost Control' if you chose the Lowest Cost Bid Strategy.



3. Make sure all the changes made are ‘Saved’ (automatically done by Facebook):

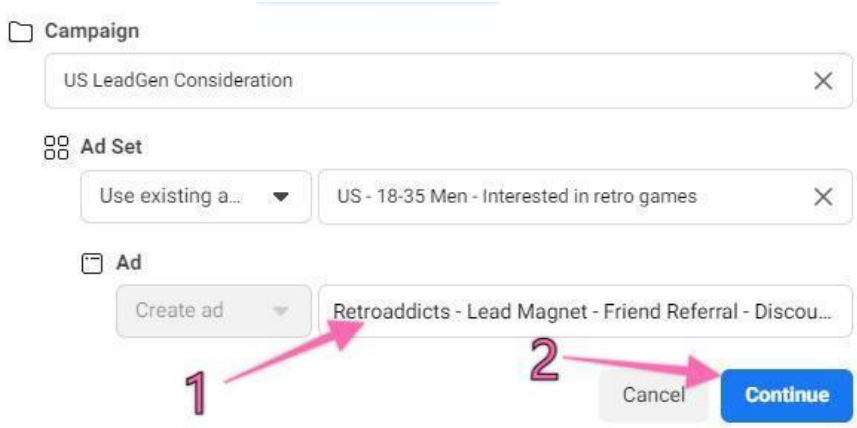
☐ Setting up Ads

1. In the FB Manager Campaign main dashboard, you will see that the ‘Campaigns’ and ‘Ad Sets’ tab have already ‘1 Selected’ item in them. Now, we can create the actual ad that the targeted audience can see by clicking on the ‘Ad’ tab.

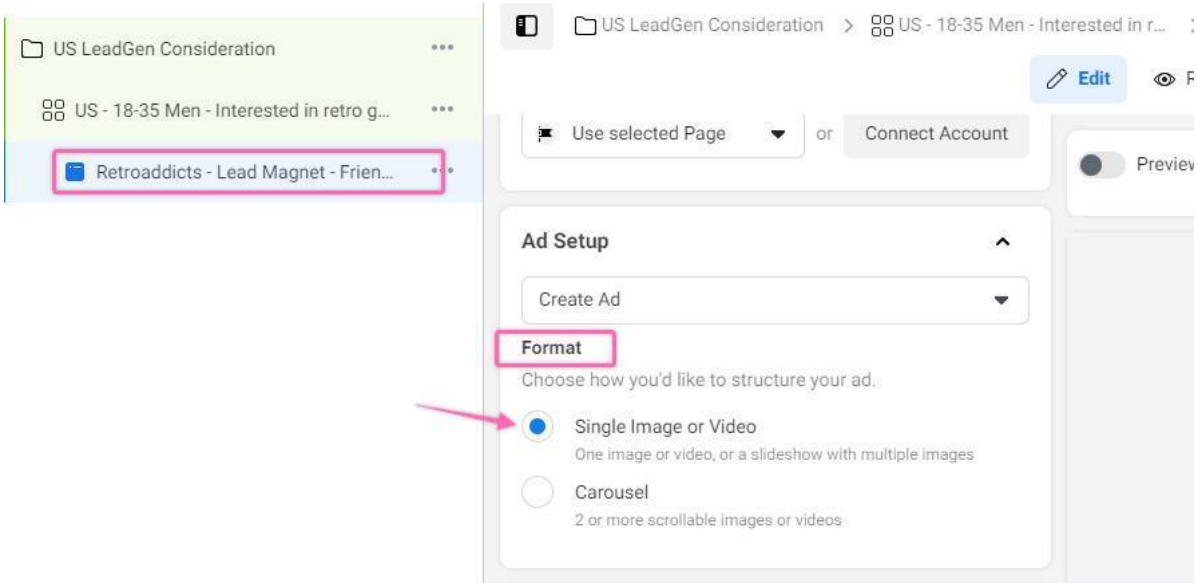


2. Click the ‘+ Create’ button, under the ‘Ads for 1 Ad Set’ tab:

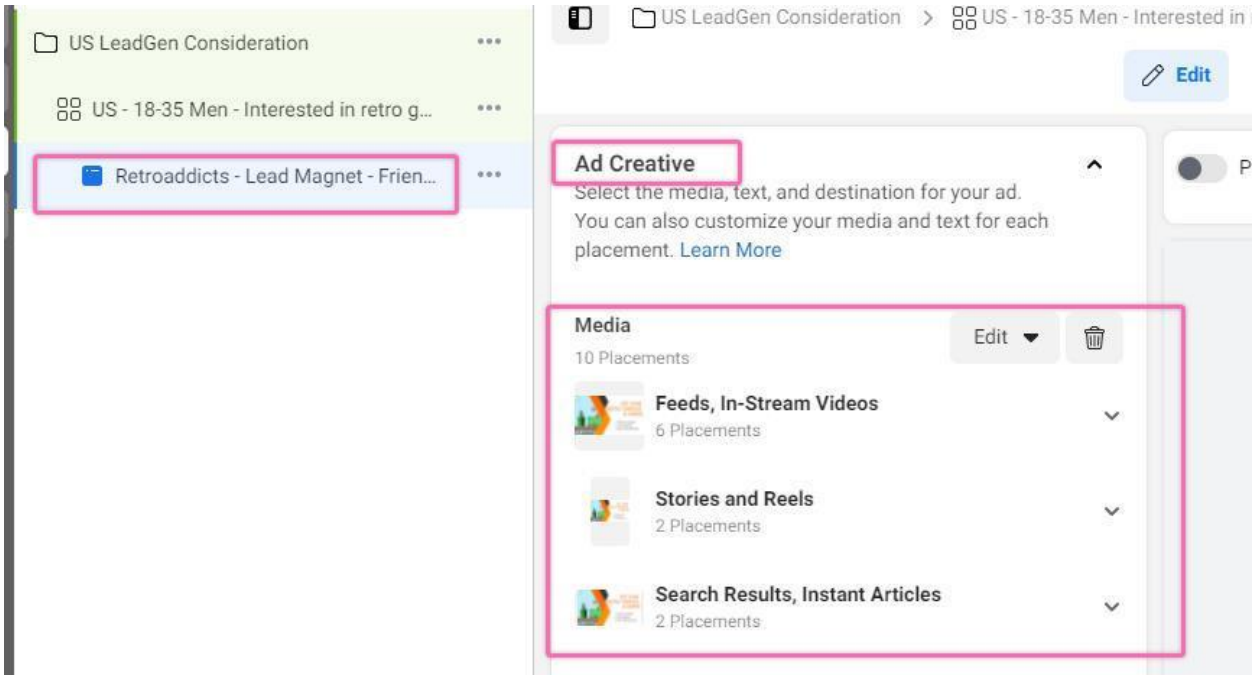
3. Rename your Ad name according to your naming convention (**E.g.:** Retroaddicts-Lead Magnet-Friend Referral-Discount Coupon) and click 'Continue'.



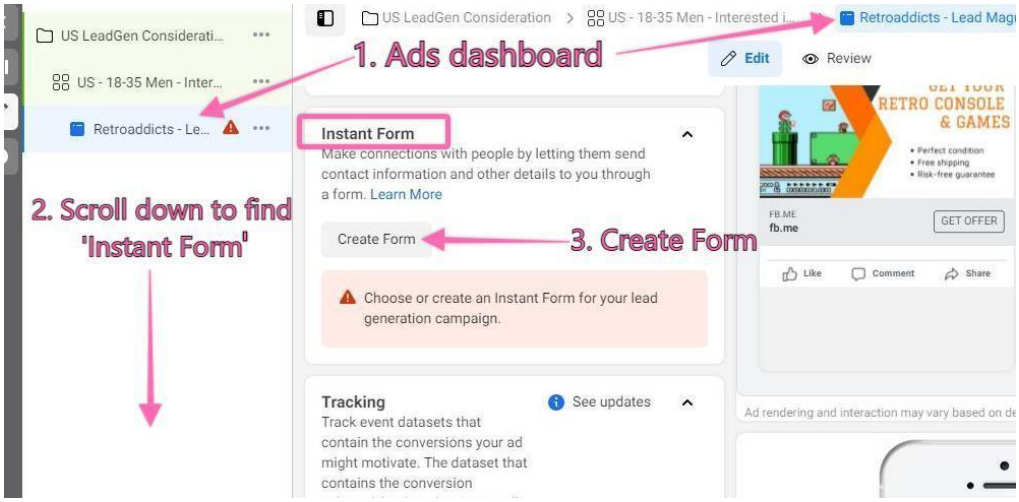
4. Although the setting for this SOP is the default ad format, you can scroll down to see that you can choose two formats: Single Image/Video & Carousel:



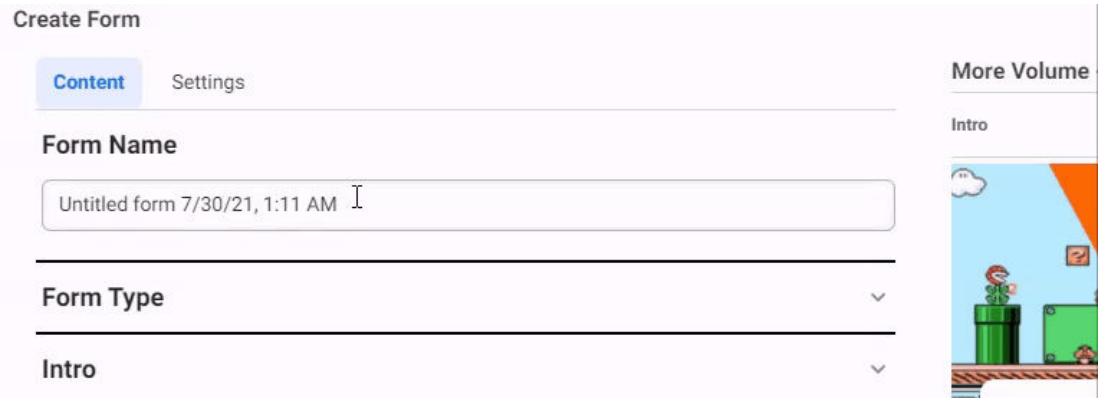
5. Also, you can set where you want your ads will appear in Facebook via Ad Creative:
    i. Feeds, In-Stream Videos (including Instagram)
    ii. Stories and Reels (including Instagram)
    iii. Search Results, Instant Articles



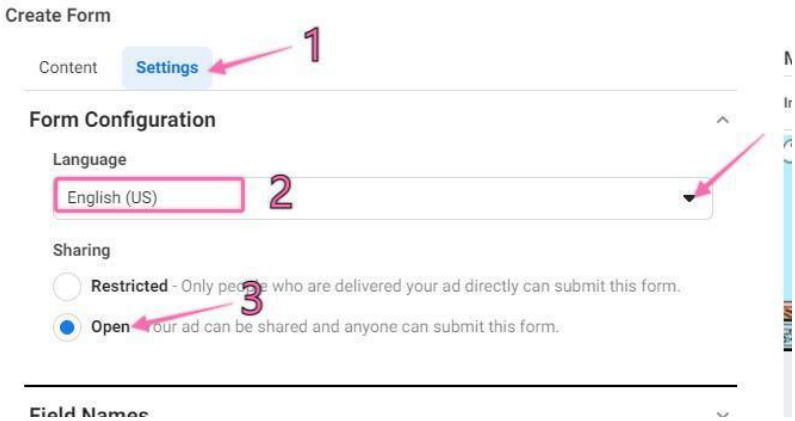
6. Notice the warning prompt ⚠ to create a form, since we previously set our '[Lead Ad Method]' to be 'Instant Forms,' which was the default setting. Scroll down to find the heading 'Instant Form,' then click 'Create Form.'



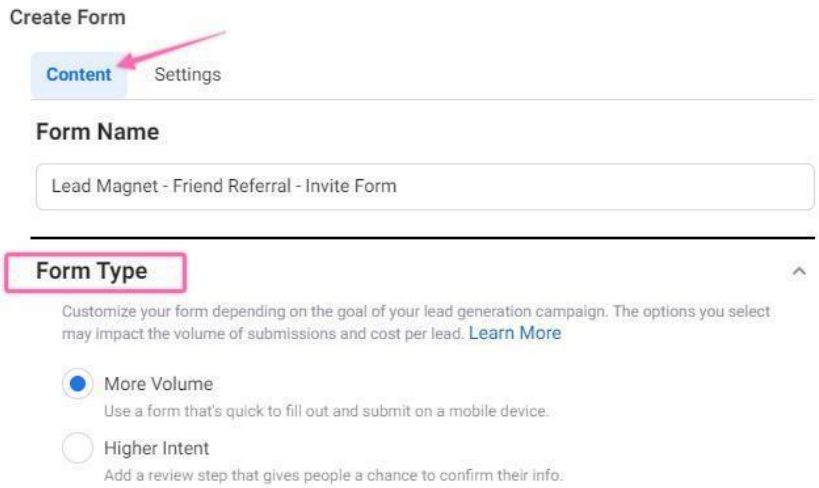
7. You can now start designing your Lead Form. Start by naming your form according to your naming convention:



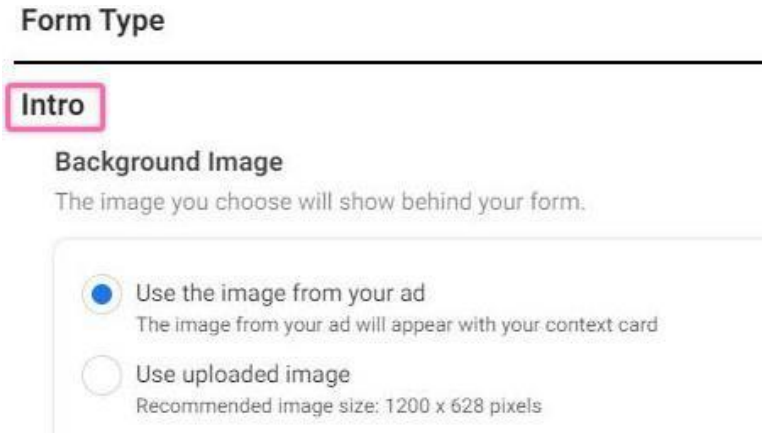
8. Click the ‘Settings’ tab → Make sure you choose the right language in the dropdown, same as the audience you are targeting → Switch from ‘Restricted’ to ‘Open’ (unless you only want to enable this form to users that have specifically been targeted by Facebook Ads.)



9. Go back to the ‘Content’ tab → Select your form type:
   - **More volume** - Select this option if your sales process does not involve a lot of time-investment with each lead. This will increase the number of leads that you get but you will also get lower quality leads.
   - **Higher intent** - Select this option if your sales process requires time-investment on your end (e.g.: your sales team will call each lead individually). This option adds an extra step for users to review their submission and confirm that they want to submit it.



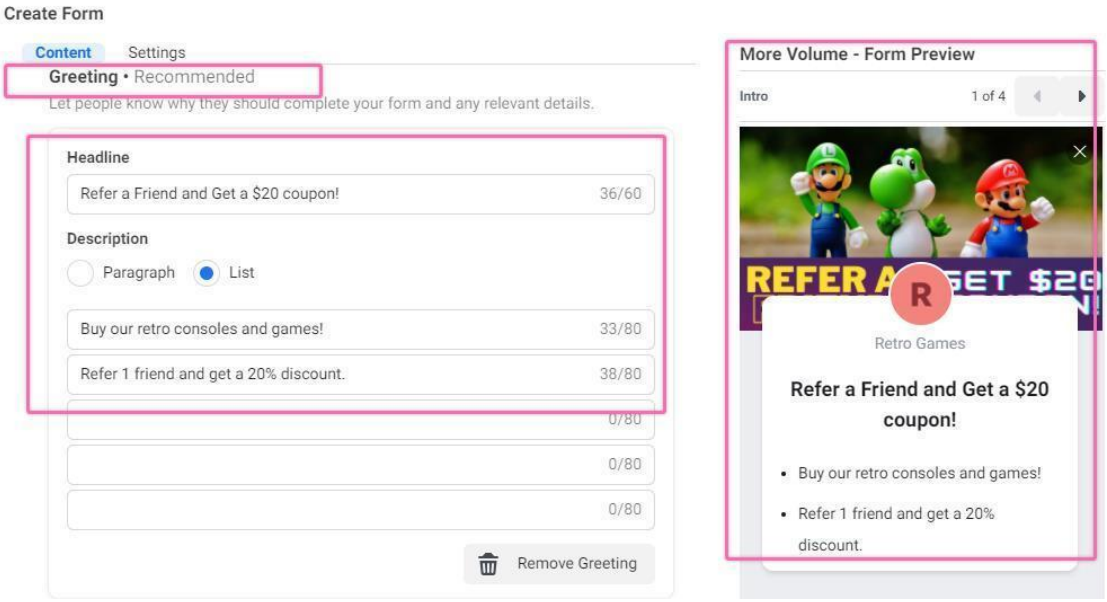
10. After 'Form Type', you will now edit 'Intro.' The default ad format is 'Single Image or Video' which you can customize back in the Ads dashboard. So, if you want to have the Carousel format, you must set it back in the Ads dashboard.



11. Select the 'Background Image' that you would like to use for this Ad.
    - ***Note**: If you want to use images that you've already used in your page (usually your banner image) as suggested by Facebook, choose 'Use the image from your ad'. If you want to upload a new image, choose 'Use uploaded image'.*
    - ***Note 2:** Keep in mind there are specific specs for each Ad format, you can find those here. (E.g.: Image Ads should be 1200x628px in size, among other rules).*

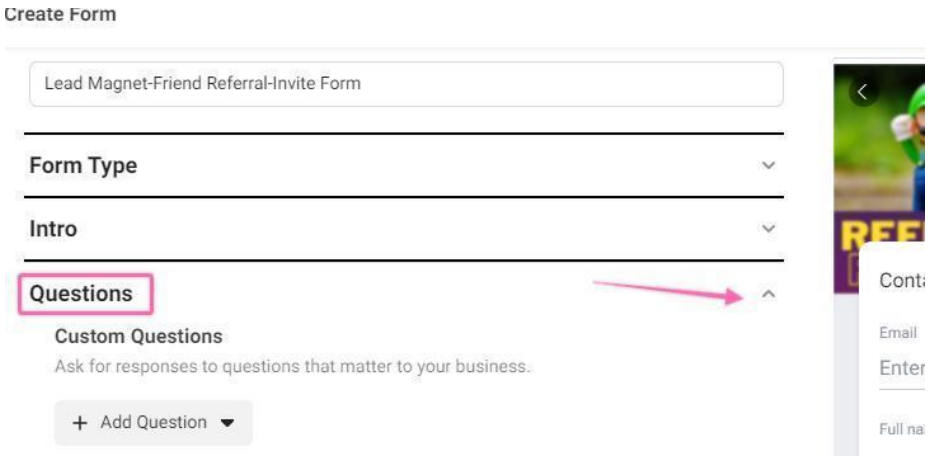
12. Configure your Ad Copy text.

- ***Note**: Depending on the type of Ad and targeting you've selected you will have different fields available, but you can always preview how your ad is looking like on the right side of the screen.*



13. Still under 'Intro', the next item is 'Greeting', where you will edit your 'Headline' and 'Description' (optional but recommended)
    - ***Note**: You will always be able to preview it on the right sidebar.*

14. After 'Intro,' the next dropdown is 'Questions' → Select the data that you would like your leads to share with you.



***Remember**: The more information you request from your users, the less inclined they will be to submit your form.*

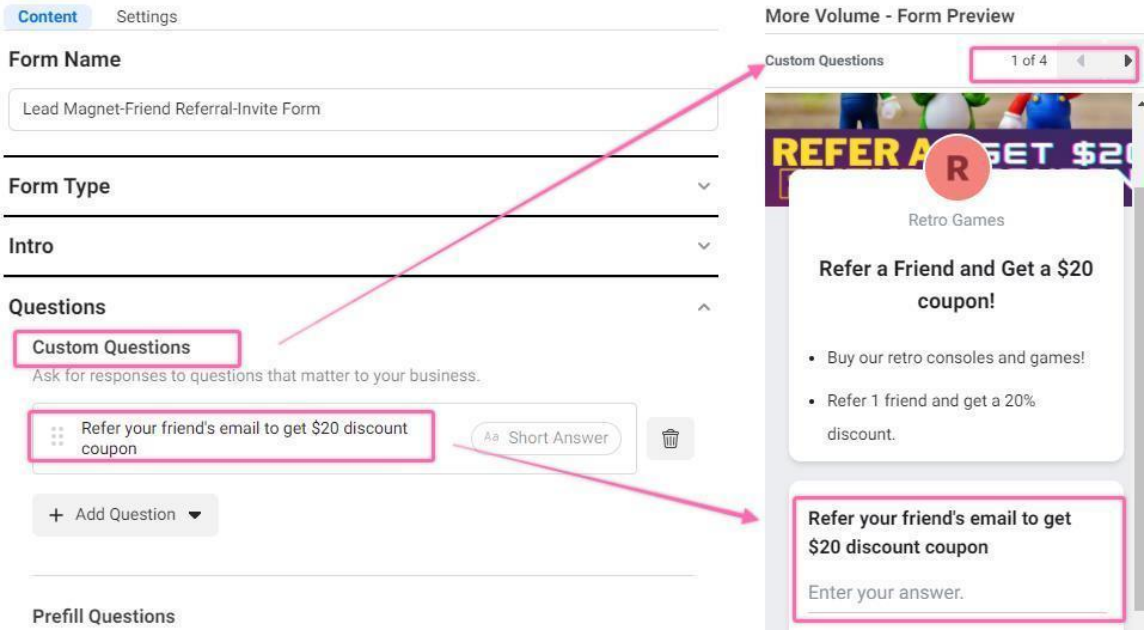
You can always further segment your leads once you have their contact information, either by interacting personally or by creating automated workflows that will enrich the user profile by progressively asking for more information as users consume your offers and move down the funnel.

When selecting fields and adding questions to your form ask yourself these questions:

- *Are we sure this data is going to be used in our sales process in the next 30 days?*
    1. *If you are not sure, do not request it. Chances are this data will never be used and you are just increasing your cost per lead by adding it.*
- *Could we get this information further down the line in the sales process without impacting our sales results?*
    1. *If yes, do not request it at this moment.*
- *Could this data violate any of the Facebook Advertising policies (check here), or any data-processing legislation that I might be subject to (check your jurisdiction's data-processing law)?*
    1. *If the answer is 'yes', or you are in doubt do not include that field.*

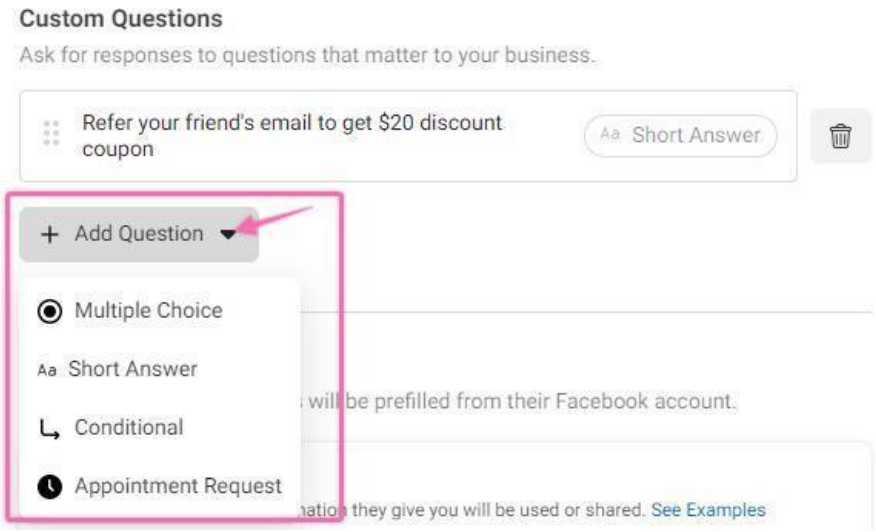
> ***E.g.**: If you are advertising a Golf course, you might feel tempted to ask users how many years they've been playing Golf for. That "might" be something that you "might" use in the future. But that is not something that you necessarily need to know the moment you are just getting to know your lead and that is something that you can ask your lead later either personally or through your marketing funnel.*

Custom Questions: In this section you can add any fields that are specific to your business or offer and are not on the 'User information' section.

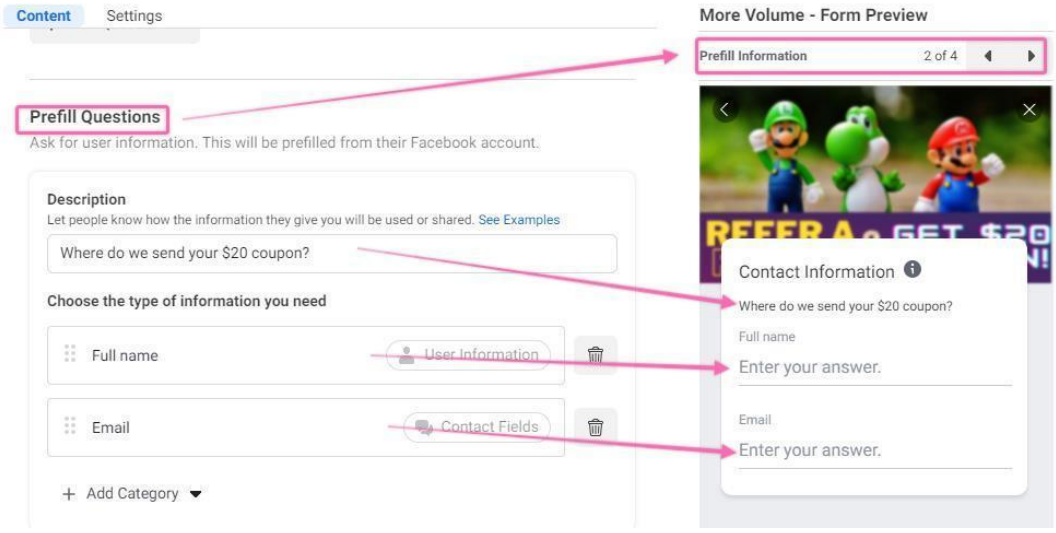


***Note**: You have multiple options when designing your 'Custom Questions'. As a general rule of thumb, you will want to standardize your responses as much as possible. You can do it by using the 'Multiple Choice', 'Conditional' and 'Appointment Scheduling' options, instead of 'Short Answer'.*

***E.g.**: If you are going to ask your user for how they would rank their Golf skills you might want to have a 'Multiple Choice' field with 'Never tried it', 'Amateur', 'Hobbyist', 'Pro', instead of having it as an open-field. This will not only make it easier for your leads to fill out the form, but it will also allow you to analyze your results and use them on your automation workflows more easily.*



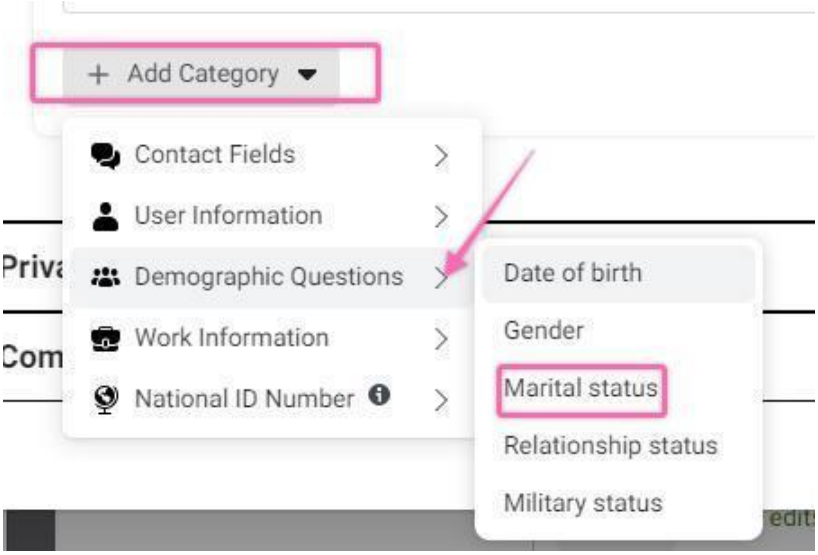
Prefill Questions: This is where you configure user information.
Description: You can explain why you want their contact information.
User Information: Any field that you select in this section will be prefilled with the user's personal profile data making it much more likely for them to submit your form since they don't need to fill out those fields themselves.



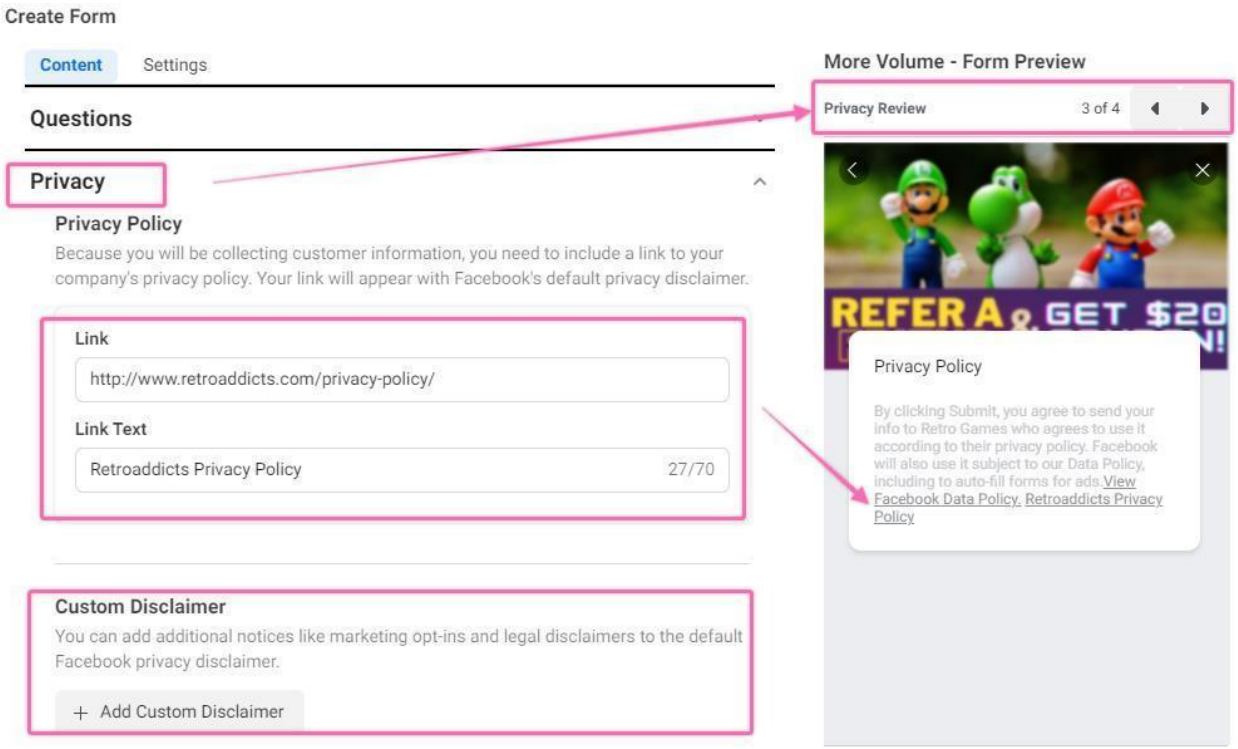
Important: *If you are going to 'Add a Category', make sure that data (or very similar) isn't already available on the "User Information" section. If it already exists, do not create a custom question for it. Doing so would be a*

violation of the Advertising Policies, which can lead to a permanent suspension of your account.

***E.g.**: There is already a 'Marital Status' field under the User Information section. You should not create a 'Are you married?' custom question.*

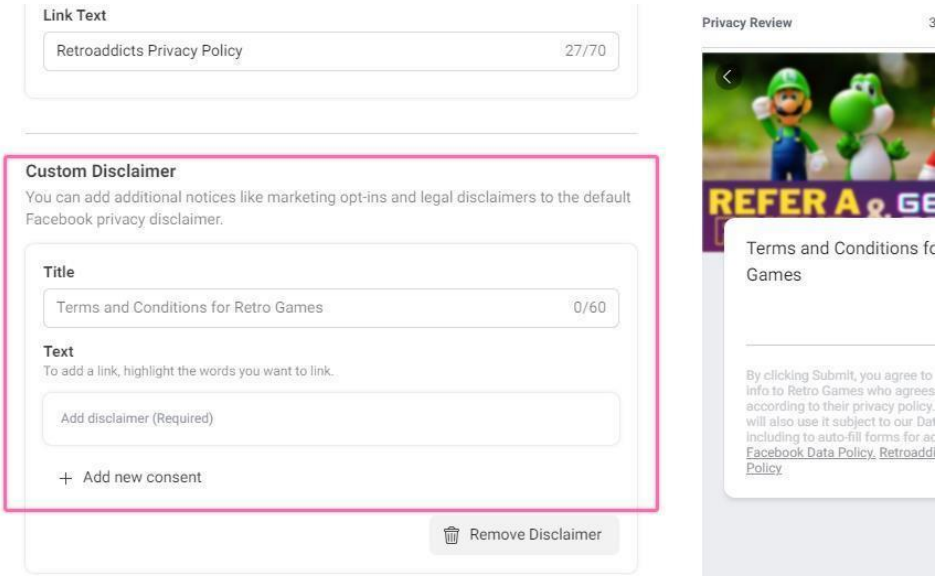


15. After 'Questions' is 'Privacy Policy' → Select the data that you would like your leads to share with you.



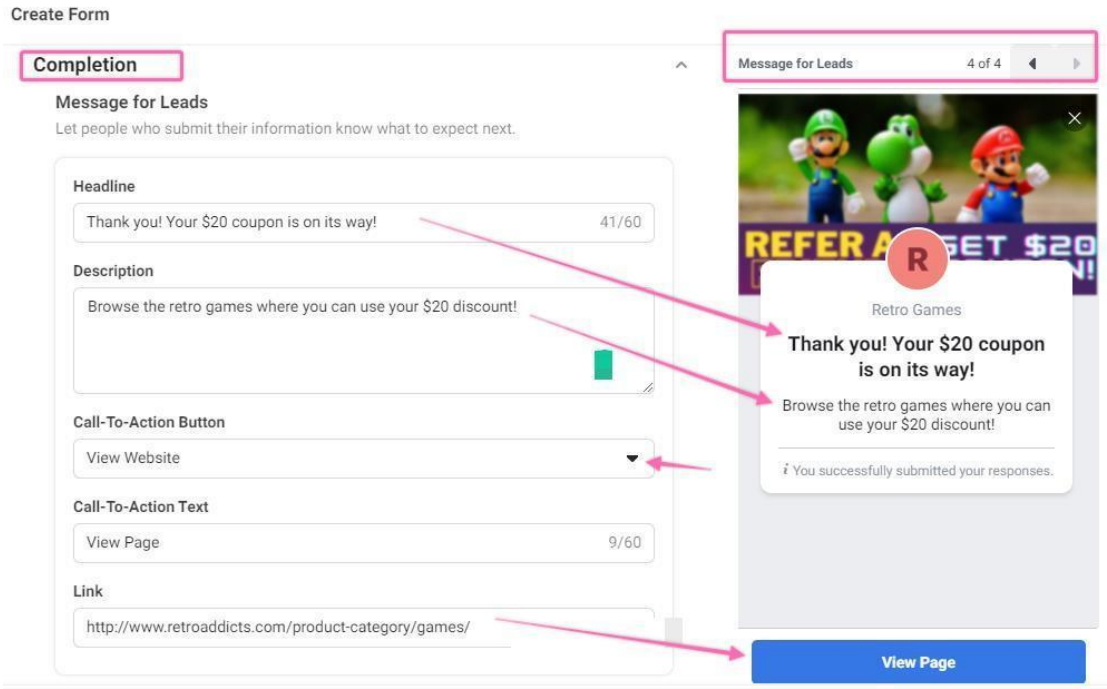
***Note**: Make sure your Privacy Policy is up-to-date, transparent, and identifies all data-processing/data-usage terms.*

***Note 2:** If adding a link to your privacy policy is not enough in your jurisdiction, you will want to check "Add a custom disclaimer". Bear in mind this will add one more step to your form.*

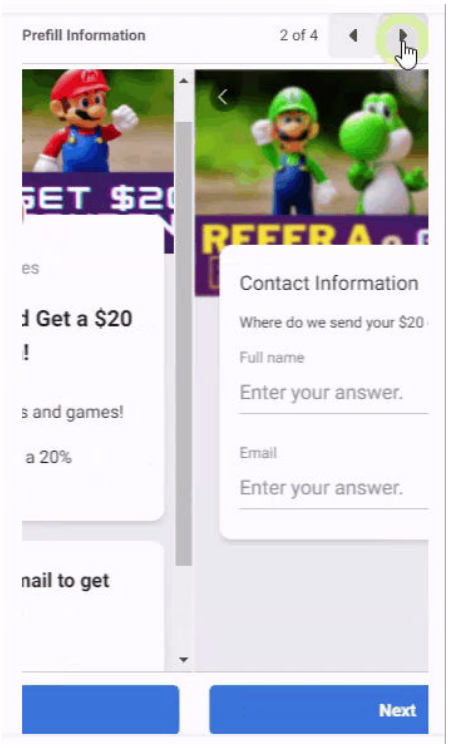


16. The last dropdown under ‘Create a Form’ is ‘Completion,’ which is essentially a ‘thank you’ screen → Configure the message that you want your user to see once they’ve submitted your form and where you want the CTA (Call-to-action) to link to.
    - ***Note**: If you are using a lead magnet (an offer in exchange for the user’s contact details), you might want to link to your offer at this point. If your form is a contact form, you might want to let the users know what to expect (when will you reach out to them, what are the next steps, how can they learn more about you meanwhile, etc.).*

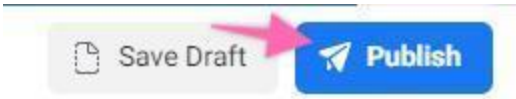
    - ***Note 2:** If you are linking to a page on your website, and you are using Google Analytics, it’s recommended that you use UTM tags on your URLs.*
        i. *If you are not using Google Analytics yet you can follow SOP009 - Adding Google Analytics to a site (using GTM);*
        ii. *If you are not using UTM parameters yet, you can follow SOP006 - Creating UTM URLs to Track Your Campaigns;*



17. Preview your Ad by using the sidebar on the right, and make sure everything looks OK:

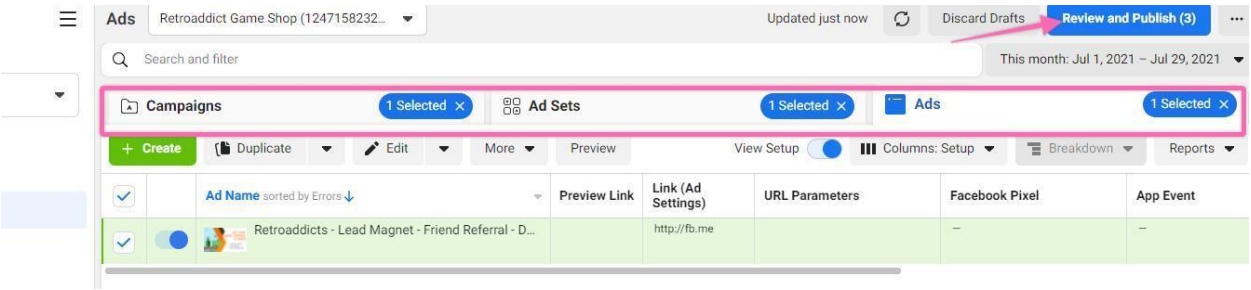


18. If everything looks OK, click 'Publish' (under the Ad preview) to publish your form.
    - ***Important**: You will not be able to edit your form after you click 'Publish'. You can always duplicate it and create a new one if you want, though.*

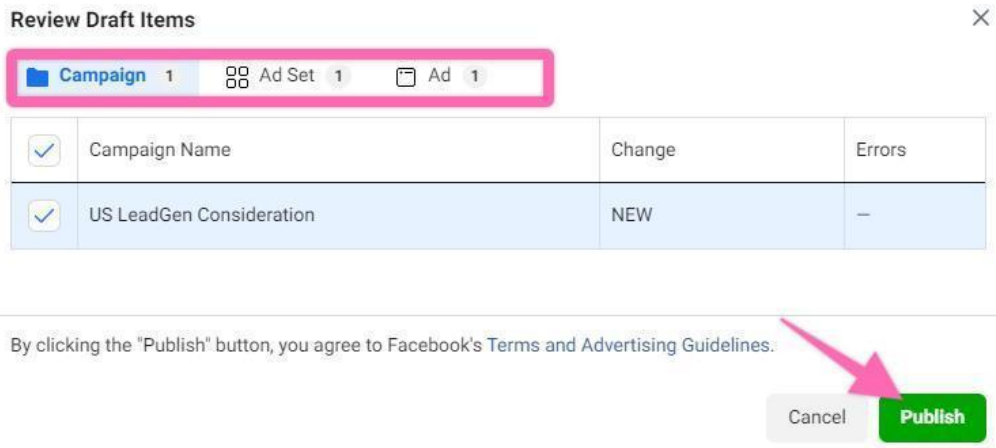


☐ Activate your FB lead generation campaign

1. Back in the FB Manager Campaign main dashboard, you will see that ALL the 'Campaigns', 'Ad Sets' and 'Ads' tabs have already '1 Selected' items in them. Click the 'Review & Publish' button.

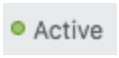


2. You will be able to review ALL the changes you've made (Draft items). If everything looks good, finally click 'Publish'.



3. That's it! Your campaign is now being reviewed.

   - *Note: It may take between 5 min - 48h for your ads to start delivering, when they do, you'll see an "Active" message instead:*

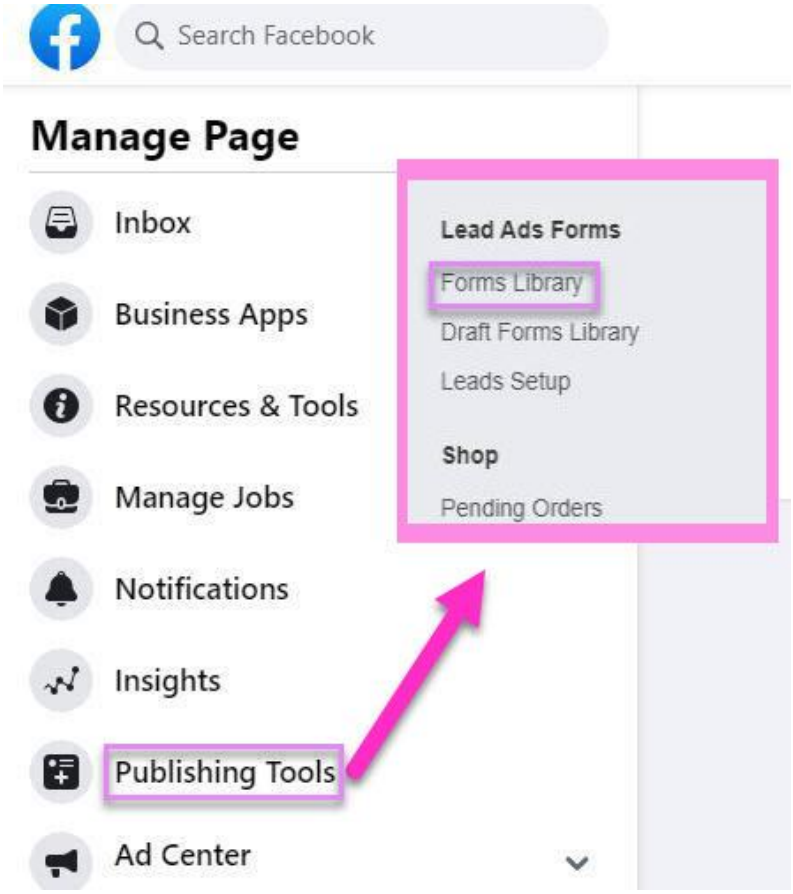


☐ Exporting your leads from Facebook Lead Ads

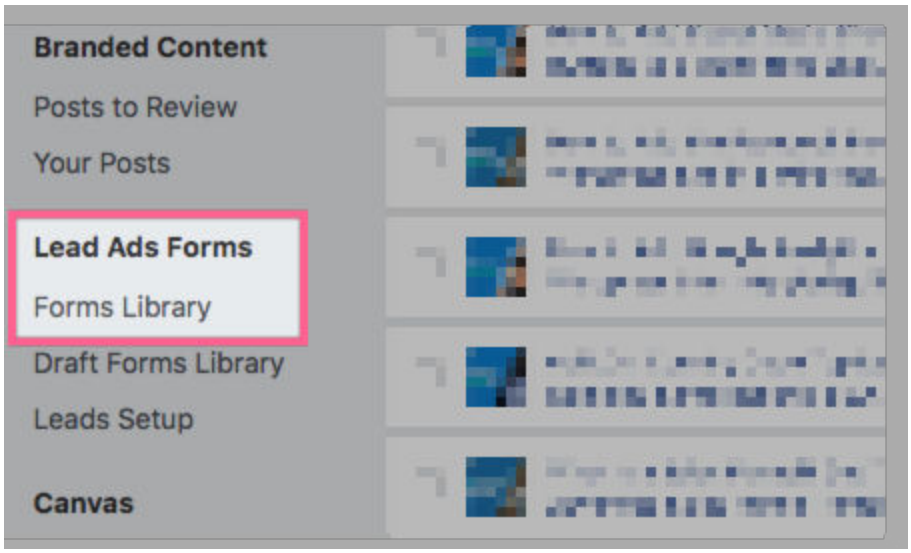
***Note**: Make sure you have Admin access to the company's Facebook Page before starting this chapter, otherwise you won't be able to download your leads. Alternatively, you can request your Admin to enable the 'Lead Access Manager' and give you access through that panel. (Out of the scope of this SOP but you can find the detailed instructions here)*

1. On Facebook, open your Facebook Page.
   ***E.g.**: https://www.facebook.com/**your_facebook_page**/*

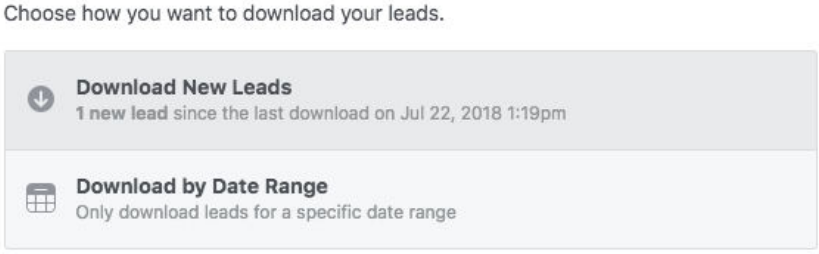
2. Click ‘Publishing Tools’ found on the sidebar.



3. Click ‘Forms Library’ under ‘Lead Ad Forms’ on the sidebar.
4. Locate your form and click “Download”.



5. Click ‘Download New Leads’ to download a list of your new leads or select ‘Download by Date Range’ if you want to download all leads that occurred on a given period.
    a. ***Important**: Leads will only be available for download for up to 90 days from the time they are submitted by a user.*



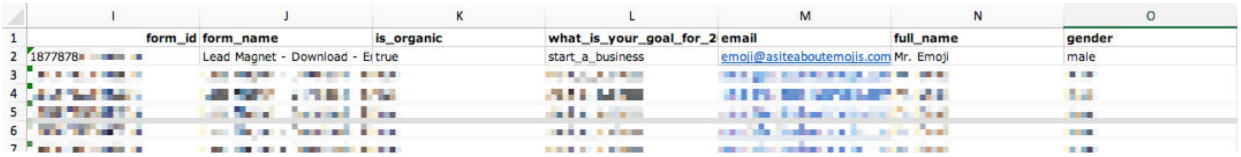
6. Select which format you prefer:
    a. ***Note**: If you are going to upload this list to another SAAS tool, CSV is typically the universal option. If you are only going to use it in a software like “Excel”, XLS might be more convenient.*

Form	Leads Count	Download Link	
Lead Magnet - Download - Emoji Cheatsheet	1	CSV	XLS

7. That’s it, you’ve successfully downloaded your leads. If you use an email marketing tool you can now import those leads to your list and use them in your

email marketing workflows. If you are using MailChimp, or if your tool integrates with Zapier, you can also follow the next chapter of this SOP below.

a. ***Important**: Don't forget to do this at least every 90 days or you might lose some of your leads.*



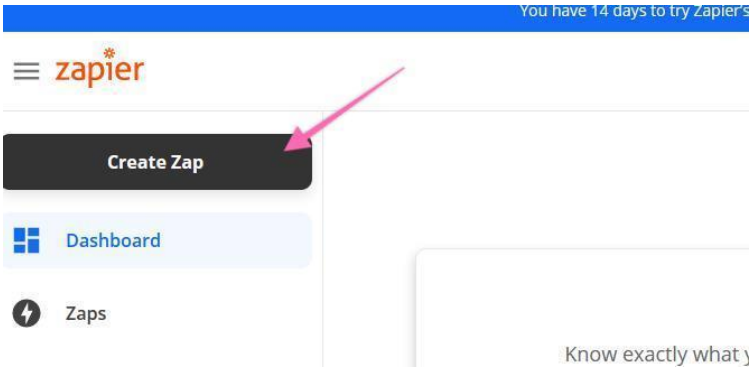
	I	J	K	L	M	N	O
1	form_id	form_name	is_organic	what_is_your_goal_for_2	email	full_name	gender
2	1877878	Lead Magnet - Download - Ei	true	start_a_business	emoji@asiteaboutemojis.com	Mr. Emoji	male
3							
4							
5							
6							
7							

☐ Using Zapier to send your leads to Mailchimp

***Note**: To follow this chapter, you should already have a Zapier account and be subscribed to a paid plan.*

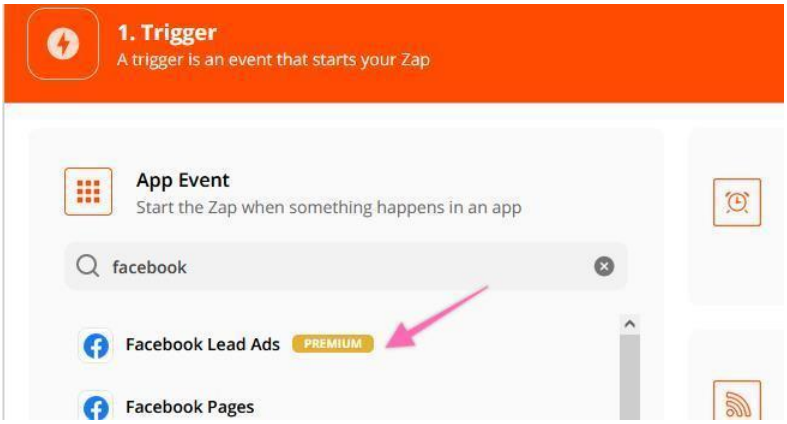
***Note 2:** Depending on which CRM / Email Marketing tool you are using, you might not need to use Zapier since a direct integration might be available. You can check the available integrations here. If you don't find your tool here, try contacting your tool's support directly.*

1. Log into your Zapier account here.
2. Click "Make a Zap" on the top left sidebar:

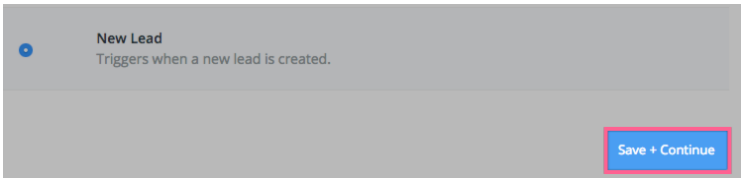


3. Rename your Zap according to your naming convention.

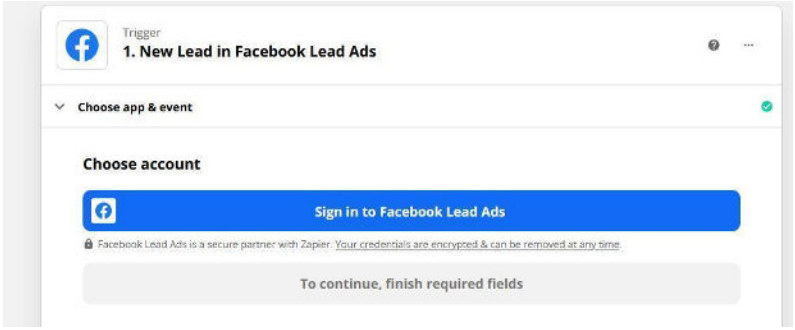
4. Search for “Facebook Lead Ads” (you should see a “Premium” tag on it) and click on that result.



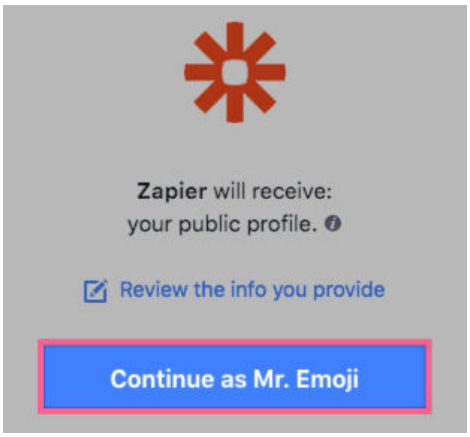
5. Select “New Lead” as the trigger, and click ‘Save + Continue’



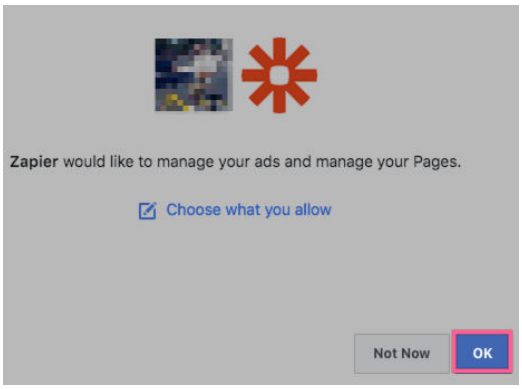
6. Click ‘Sign in to Facebook Lead Ads’



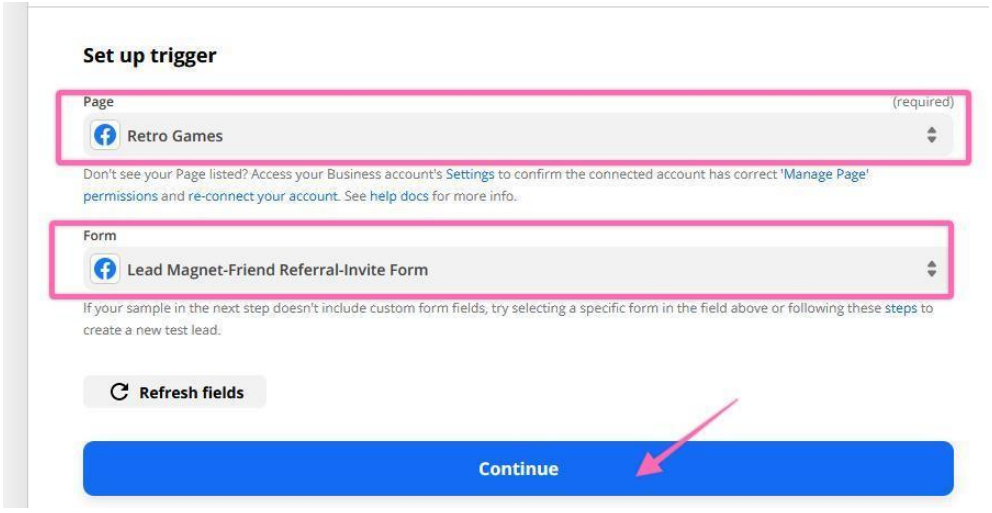
7. Click ‘Continue as (...)’



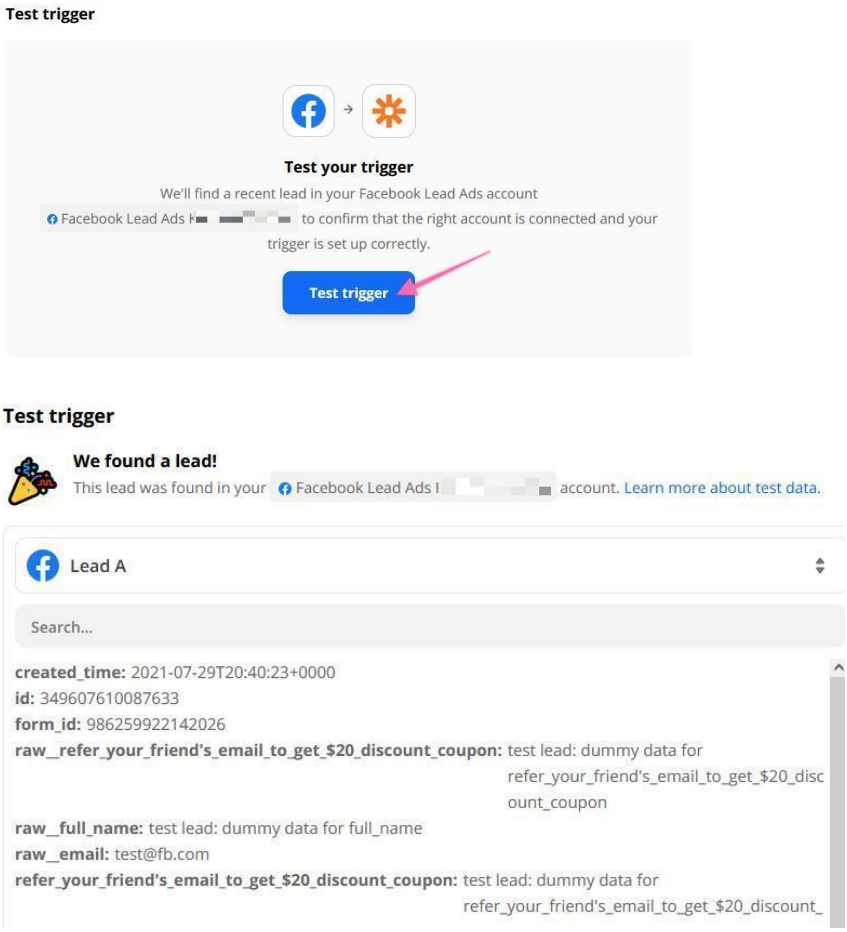
8. Click ‘OK’



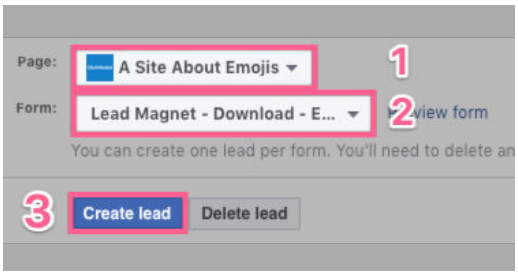
9. Click ‘Continue’:
10. Under ‘Set up Trigger,’ Select the Facebook Page where your Form belongs to → Select your form from the dropdown → Click ‘Continue’.



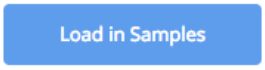
11. Click ‘Test Trigger’ and Zapier will test your Facebook lead ad form if it works.



a. If you can't see any test data, you might need to generate it via Facebook. On a new tab, go to 'Facebook Lead Ads Testing' tool by clicking here.

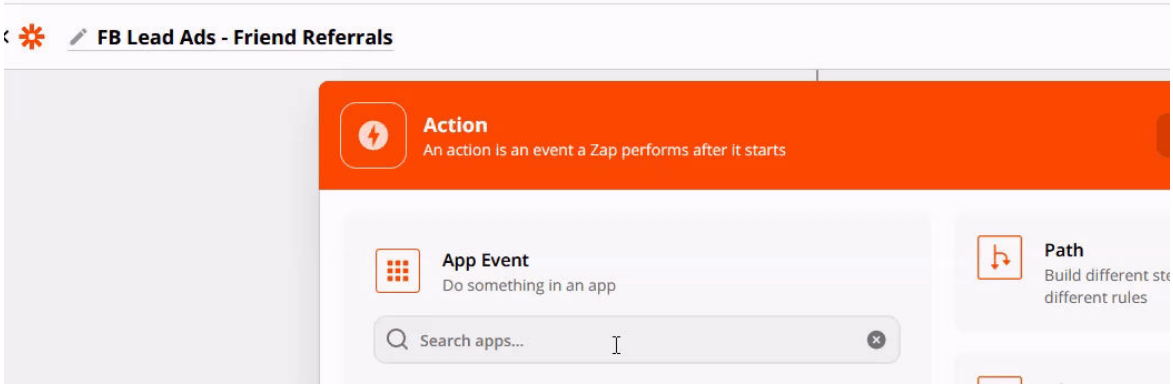


b. Go back to Zapier and click "Load in Samples":

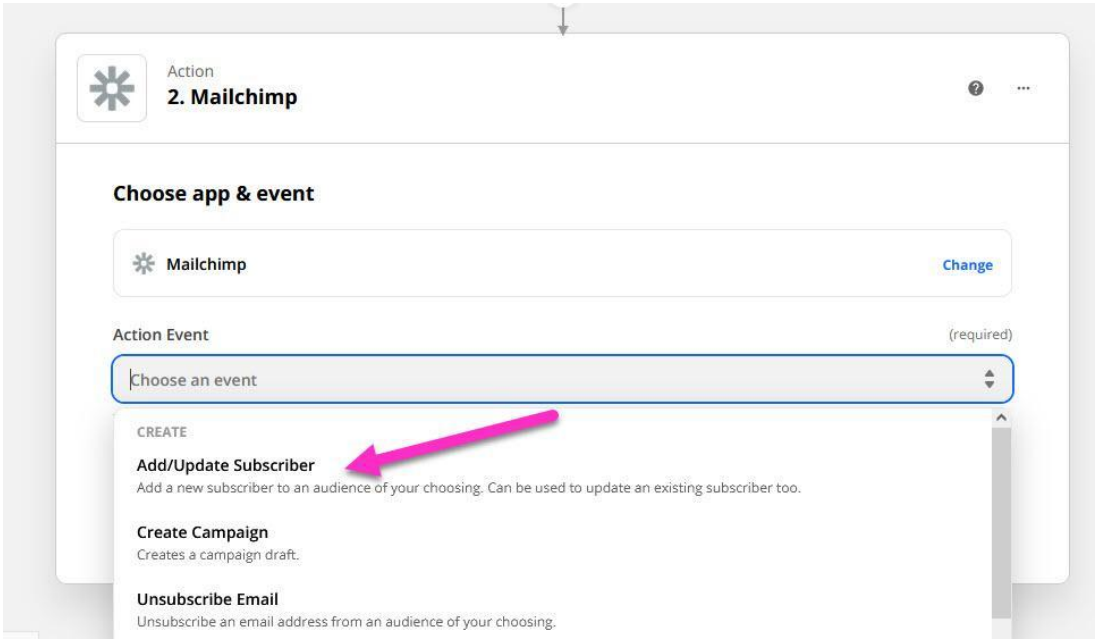


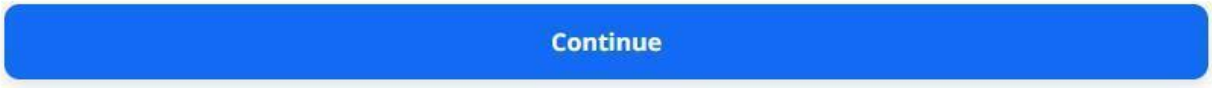
c. You should be able to see a Lead appear in the next screen. Click 'Continue'

12. Add an 'Action' to your Zap, search for 'Mailchimp.'
    a. ***Note**: If you use any other Email Marketing / CRM tool, you can select your tool here alternatively. The next steps might vary slightly for other platforms.*

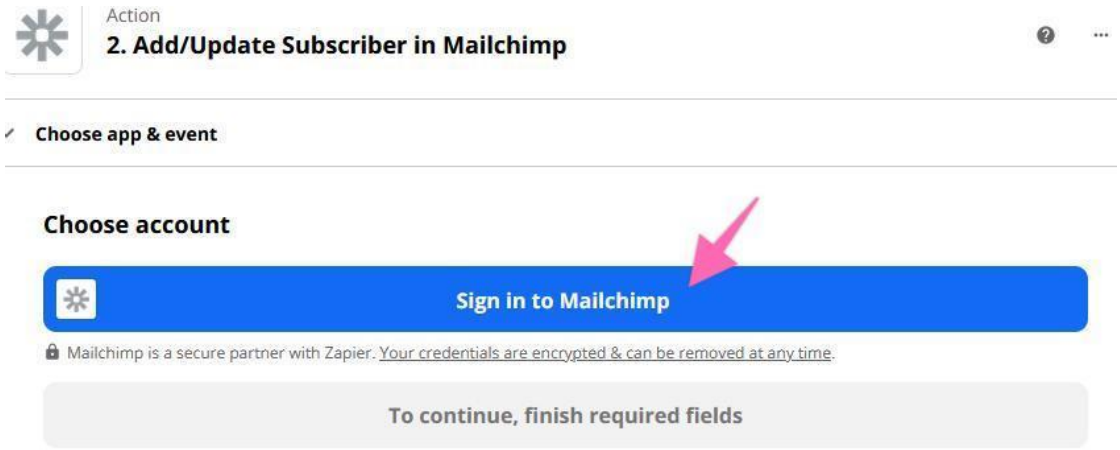


13. Select 'Add/Update Subscriber' then 'Continue.'

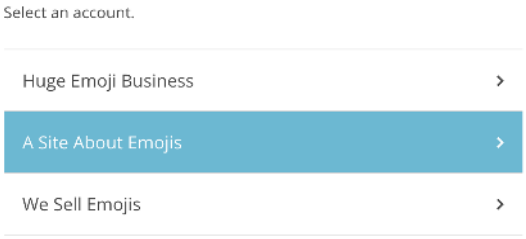




14. Connect your MailChimp Account by clicking ‘Sign in to Mailchimp’ and then log in with your Mailchimp credentials:

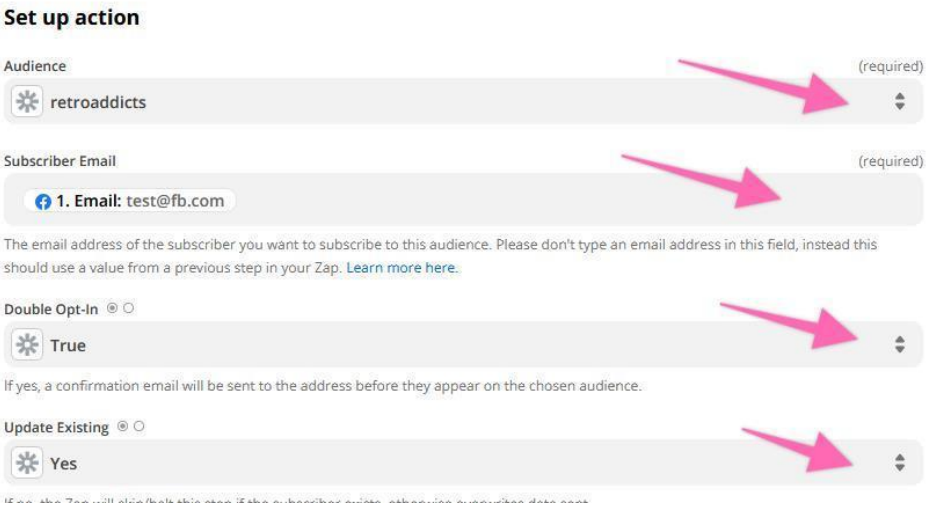


***Note**: If you have multiple accounts make sure you select the account you want your emails to be sent from.*

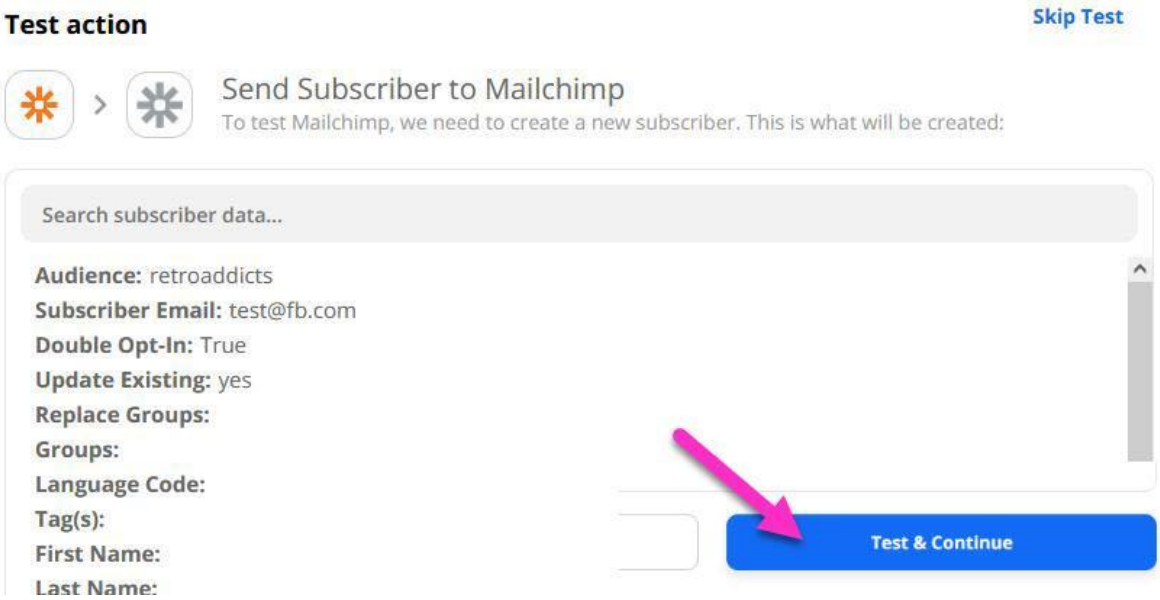


15. You will see a list of properties that are available on the MailChimp list you’ve selected, map each of the properties to your FB Lead Ads property.

a. ***E.g**: "Subscriber Email" → "Email"*



16. Once you've mapped all the fields, click 'Click 'Test & Continue.'



17. You will see a 'Test was successful' message. Then click on 'Turn on Zap.'

18. On a new tab, open your MailChimp list (you can find your lists by clicking here), you should be able to see a new lead in there with the data you've just configured in Zapier:

19. Go back to your Zapier tab again, if everything looks good, click 'Turn on Zap.'

20. **That's it!** You've successfully integrated FB Lead Ads with MailChimp. Whenever a new lead submits your Lead Ads form, that lead will be sent to your MailChimp list.