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Digital Notes

Module 7: Meta Ads & Lead Generation

Learn how to run high-performing Meta ads
and *generate quality leads* that convert



Meta Ads
Strategy



Audience
Targeting



Ad Placement
& Formats



Lead
Generation



Campaign
Optimization



Retargeting
& Remarketing



Lead Forms
& Funnels



Analytics &
Reporting



Audience



Conversions



Lead Forms



Cost per Lead



www.learntoearnlabs.com



+91-9548868337



team@learntoearnlabs.com

Module 7

Meta Ads & Lead Generation

Module Overview

Meta Ads is an online advertising system used to run campaigns across platforms and placements such as:

- Facebook
- Instagram
- Messenger
- WhatsApp-supported destinations
- Meta Audience Network

Meta advertisements can help businesses generate:

- Brand awareness
- Website traffic
- Leads
- Phone calls
- Messages
- Appointment bookings
- E-commerce purchases
- Application installations
- Local-store enquiries

This module explains how beginners can create the necessary Meta business assets, configure billing, install the Meta Pixel, set up conversion events and run campaigns for:

1. An e-commerce website
2. A service-based website
3. A local physical store
4. Instant-form lead generation
5. Website-form lead generation
6. Messaging and call-based leads

Meta regularly updates Ads Manager and Business Suite. Menu names and available options may vary according to account, country, objective and feature rollout. The practical principles in this module remain applicable even when the interface changes.

Learning Objectives

After completing this module, learners should be able to:

- Understand the Meta advertising ecosystem.
- Create and secure Meta business assets.
- Create a Meta ad account.
- Connect Facebook and Instagram.
- Configure payment and account access.
- Install and test the Meta Pixel.
- Understand the Conversions API.
- Define suitable conversion events.
- Create campaigns in Meta Ads Manager.
- Develop audience and placement strategies.
- Create instant-form lead campaigns.
- Create website lead-generation campaigns.
- Create message and call campaigns.
- Run e-commerce sales campaigns.
- Promote a local physical store.
- Create Custom and Lookalike Audiences.
- Run retargeting campaigns.
- Calculate and optimise campaign performance.
- Track lead quality rather than only lead volume.

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1. Introduction to Meta Advertising

1.1 What Is Meta Ads?

Meta Ads is a paid advertising system that helps businesses deliver advertisements to selected audiences across Meta technologies.

Businesses can target or guide delivery using information such as:

- Location
- Age
- Language
- Interests
- Behavioural signals
- Website activity
- Customer lists
- Facebook and Instagram engagement
- Previous purchases
- Similarity to existing customers

Targeting availability depends on policies, country, industry and account eligibility.

1.2 Organic vs Paid Meta Marketing

Organic marketing

Includes unpaid:

- Facebook posts
- Instagram Reels
- Stories
- Community replies
- Facebook Groups
- Live sessions
- Direct messages

Paid marketing

Includes advertisements created through:

- Meta Ads Manager
- Meta Business Suite
- Promotional tools available within Facebook or Instagram

Organic marketing	Meta advertising
Builds relationships gradually	Provides paid and scalable reach
Reach depends on followers and distribution	Can reach new selected audiences
Requires consistent content	Requires budget and campaign management
Supports trust and community	Supports measurable leads and sales
Limited delivery control	Greater delivery and optimisation control

Organic and paid strategies should support each other.

1.3 Discovery vs Search Advertising

Google Search Ads often reach people actively searching for a solution.

Meta Ads frequently reach people while they are:

- Browsing Facebook
- Watching Instagram Reels
- Viewing Stories
- Messaging
- Consuming entertainment or social content

Therefore, Meta advertisements must often:

1. Gain attention.
2. Introduce a problem or desire.
3. Explain the value.
4. Build trust.
5. Present a clear action.

2. Meta Advertising Ecosystem

Important Meta business tools include:

- Facebook Page
- Instagram professional account
- Meta Business Suite
- Meta Business Portfolio
- Meta Ads Manager

- Meta Events Manager
- Meta Pixel
- Conversions API
- Product catalogue
- Commerce-related tools
- Leads Center
- Custom Audiences
- Lookalike Audiences

2.1 Facebook Page

Represents the business on Facebook and may act as the identity behind advertisements.

2.2 Instagram Professional Account

Represents the business or creator on Instagram.

2.3 Meta Business Suite

Used to manage:

- Pages
- Instagram accounts
- Posts
- Messages
- Notifications
- Some advertising activities
- Business tools

2.4 Business Portfolio

A Business Portfolio helps an organisation manage assets, people, partners and permissions.

Assets may include:

- Facebook Pages
- Instagram accounts
- Ad accounts
- Datasets or Pixels
- Catalogues
- Applications

2.5 Meta Ads Manager

Meta Ads Manager is the primary system used to create and manage campaigns across Facebook, Instagram, Messenger and eligible Meta placements. [Meta's Ads Manager campaign guide](#)

2.6 Events Manager

Used to:

- Create or connect a dataset or Pixel
- Configure website events
- Review event activity
- Diagnose tracking problems
- Manage Conversions API connections
- Test events
- Prioritise measurement setup

3. Meta Ads Campaign Structure

Meta Ads Manager uses three main levels:



3.1 Campaign Level

The campaign level normally controls:

- Campaign objective
- Campaign name
- Special advertisement category
- Campaign budget options
- Campaign tests
- Campaign-level automation settings

3.2 Ad Set Level

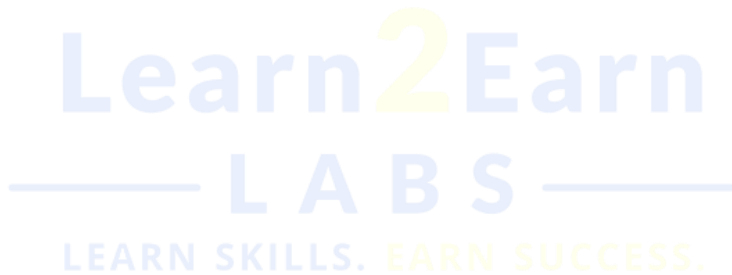
The ad set normally controls:

- Conversion location
- Performance goal
- Dataset or Pixel
- Conversion event
- Budget, depending on setup
- Schedule
- Audience
- Placements
- Attribution-related settings
- Destination

3.3 Advertisement Level

The advertisement level controls:

- Facebook Page
- Instagram account
- Format
- Images or videos
- Primary text
- Headline
- Description
- CTA
- Destination URL
- Tracking parameters



3.4 Example Structure

Campaign: Leads | Digital Marketing Course | Delhi

Ad Set 1: Students | Delhi | Instant Form

- └─ Ad 1: Student Project Video
- └─ Ad 2: Career-Focused Image
- └─ Ad 3: Testimonial Carousel

Ad Set 2: Graduates | Delhi | Instant Form

- └─ Ad 1: Portfolio Video
- └─ Ad 2: Course Benefits Image

Keep the structure simple enough to collect meaningful data.

4. Meta Campaign Objectives

Available objectives generally follow business outcomes such as:

- Awareness
- Traffic
- Engagement
- Leads
- App promotion
- Sales

4.1 Awareness

Suitable for:

- Reach
- Brand awareness
- Video exposure
- New product introductions
- Local-store awareness

4.2 Traffic

Suitable for:

- Landing-page visits
- Blog traffic
- Product-page traffic
- Initial traffic testing

Traffic campaigns optimise for traffic-related actions, not necessarily purchases or qualified leads.

4.3 Engagement

Suitable for:

- Post engagement
- Video engagement
- Messages in relevant setups
- Community interaction

4.4 Leads

Suitable for:

- Instant forms
- Website forms
- Messenger conversations
- Instagram conversations
- WhatsApp-related lead destinations where available
- Calls
- App-based leads in eligible setups

Meta currently supports lead generation through forms, messages and calls, subject to account and regional availability. [Meta lead-generation overview](#)

4.5 Sales

Suitable for:

- Website purchases
- Product-catalogue sales
- Application sales
- In-store or offline outcomes in eligible setups
- Retargeting

4.6 Choose the Correct Objective

Do not choose Traffic merely because clicks appear cheaper if the actual goal is qualified leads.

Business goal	Suitable objective
Reach local residents	Awareness
Generate course enquiries	Leads
Generate website purchases	Sales
Receive Instagram conversations	Leads or engagement setup, depending on available options
Generate app installations	App promotion
Promote an educational blog	Traffic
Sell catalogue products	Sales

5. Preparation Before Account Setup

5.1 Business Information

Prepare:

- Legal business name
- Business address
- Website
- Business email
- Phone number
- Tax details where applicable
- Facebook Page
- Instagram account
- Payment method
- Privacy policy
- Advertising budget
- Main conversion
- Customer follow-up process

5.2 Website Checklist

Confirm:

- HTTPS works.
- Website loads on mobile.
- Products or services are explained clearly.
- Contact details are accurate.
- Forms work.
- Checkout works.
- Privacy policy is visible.
- Refund or cancellation policy is available where applicable.
- Thank-you process works.
- Meta tracking can be installed.
- Cookie or consent process is configured where legally required.

5.3 Lead-Generation Preparation

Before running lead ads, define:

- What counts as a lead?
- What makes a lead qualified?
- Who receives the lead?
- How quickly will the lead be contacted?

- What questions should be asked?
 - Where will lead status be stored?
 - How will sales be reported?
 - What is an acceptable cost per qualified lead?
-

6. Creating and Securing Meta Business Assets

6.1 Create or Optimise a Facebook Page

1. Sign in using an authentic personal Facebook account.
2. Create or claim the business Page.
3. Enter the correct business name.
4. Select an accurate category.
5. Add a profile image.
6. Add a cover image.
7. Write the business description.
8. Add phone, email, website and address.
9. Add business hours.
10. Configure the CTA button.
11. Review the Page as a visitor.
12. Publish useful organic content before advertising where possible.

6.2 Create an Instagram Professional Account

1. Create or select the Instagram account.
2. Open account settings.
3. Switch to a professional account.
4. Select Business or Creator according to the use case.
5. Add contact options.
6. Complete the biography.
7. Add profile image.
8. Add website or landing-page link.
9. Review category visibility.
10. Connect the correct Facebook Page.

6.3 Create a Business Portfolio

The interface may use terms such as Business Portfolio, Business Settings or Meta Business Suite.

General process:

1. Open Meta Business Suite.
2. Open business settings.
3. Create a Business Portfolio where required.
4. Enter the business name.
5. Enter the business email.
6. Confirm the information.
7. Add the Facebook Page.
8. Add the Instagram account.
9. Create or add the ad account.
10. Add the dataset or Pixel.
11. Assign people.
12. Configure security.

6.4 Business Asset Ownership

Before adding an asset, determine:

- Who legally owns it?
- Is it already owned by another Business Portfolio?
- Is the agency requesting access or ownership?
- Will the client retain control if the agency relationship ends?

An agency should generally request partner access rather than taking ownership of a client's assets.

6.5 Account Security

1. Enable two-factor authentication.
2. Use unique passwords.
3. Never share personal login credentials.
4. Assign users individually.
5. Give minimum required permissions.
6. Remove former staff immediately.
7. Review connected partners.
8. Keep backup administrators.
9. Protect recovery email and phone details.
10. Review security alerts.

Meta's terms prohibit sharing a Facebook account or using inauthentic profiles for team access. [Meta ad-account access guidance](#)

7. Creating a Meta Ad Account

7.1 General Setup Process

1. Open Business Settings.
2. Open Accounts.
3. Select Ad Accounts.
4. Choose **Add**.
5. Select **Create a new ad account**.
6. Enter an account name.
7. Select the correct time zone.
8. Select the correct currency.
9. Choose the business that will use the account.
10. Assign people and permissions.
11. Add a payment method.
12. Review account information.

7.2 Important Permanent Settings

Carefully select:

- Currency
- Time zone
- Business country

These affect billing and reporting and may not be easily changeable.

Example name

Learn2Earn Labs | India | Main Meta Ads Account

7.3 User Roles

Depending on the setup, permissions may allow users to:

- View performance
- Create and edit advertisements
- Manage campaigns
- Manage payment methods
- Manage users and permissions

Do not make every user an administrator.

8. Billing and Payment Setup

8.1 Add a Payment Method

1. Open Billing or Payment Settings.
2. Select the correct ad account.
3. Add a payment method.
4. Enter billing information.
5. Enter tax information where applicable.
6. Review payment threshold or billing process.
7. Set an account spending limit where useful and available.
8. Save.
9. Confirm that the payment method is active.

Available payment methods depend on country, account and eligibility.

8.2 Budget Control

Meta may allow:

- Daily budget
- Lifetime budget
- Campaign-level budget
- Ad-set-level budget

Daily budget

Average amount the advertiser is willing to spend per day.

Lifetime budget

Total amount available for the scheduled campaign period.

8.3 Internal Budget Sheet

Campaign	Objective	Daily budget	Duration	Planned total
Instant-form leads	Leads	₹1,000	30 days	₹30,000
Website retargeting	Sales	₹300	30 days	₹9,000
Local awareness	Awareness	₹500	14 days	₹7,000

Platform delivery and billing rules can affect exact daily expenditure. Monitor actual charges.

9. Meta Pixel

9.1 What Is the Meta Pixel?

The Meta Pixel is website code that sends event information to Meta.

It can help measure actions such as:

- Page views
- Product views
- Add to cart
- Checkout
- Purchase
- Lead
- Registration
- Search
- Contact

9.2 Pixel and Dataset Terminology

Meta has been consolidating website, application and offline event information into datasets. Existing Pixel IDs may also function as dataset IDs in relevant interfaces.

9.3 Meta Pixel Setup

Meta's current setup generally begins in Events Manager by selecting **Connect data**, choosing **Web**, creating the Pixel or dataset and selecting an installation method. [Official Meta Pixel setup guide](#)

General process

1. Open Events Manager.
2. Click **Connect data**.
3. Select **Web**.
4. Click **Connect**.
5. Enter a clear Pixel or dataset name.
6. Enter the website URL if requested.

7. Choose an installation method:

- Partner integration
- Manual code
- Developer instructions

8. Install the base code.

9. Configure events.

10. Test event activity.

11. Connect the dataset to the ad account.

12. Confirm that Ads Manager can select the event.

9.4 Partner Integration

A partner integration may be available for platforms such as:

- Shopify
- WooCommerce
- WordPress-related systems
- Wix
- Other supported e-commerce or CMS platforms

General process:

1. Select partner integration.
2. Select the platform.
3. Sign in securely.
4. Choose the correct business assets.
5. Connect the Pixel or dataset.
6. Enable Conversions API if supported and appropriate.
7. Complete platform-specific configuration.
8. Test all events.

Do not install several Pixel integrations simultaneously. Duplicate installations can produce duplicate events.

9.5 Manual Installation

Manual installation may require a developer.

General process:

1. Copy the base Pixel code.
2. Place it in the website header according to Meta's instructions.
3. Install it across required pages.

4. Add standard-event code or use the event setup tool.
5. Publish the changes.
6. Test in Events Manager.
7. Confirm one event fires for one action.

9.6 Event Setup Tool

Where available, the Event Setup Tool can configure events without manually coding every action.

Possible use:

- Track button clicks
- Track URLs
- Configure common website actions

Test carefully. A button labelled “Submit” does not guarantee that a valid lead was submitted.

10. Standard Events and Conversion Planning

10.1 Common E-commerce Events

- PageView
- ViewContent
- Search
- AddToCart
- InitiateCheckout
- AddPaymentInfo
- Purchase

10.2 Common Service Events

- PageView
- ViewContent
- Contact
- Lead
- Schedule
- CompleteRegistration

10.3 Local-Business Events

- Contact
- Lead
- Schedule
- Search
- Purchase

Phone, direction and message activity may require platform-specific or custom measurement methods.

10.4 Conversion Plan

Event	Business meaning	Primary?	Value
Purchase	Completed order	Yes	Dynamic order value
Lead	Valid form submission	Yes	Estimated lead value
Schedule	Appointment booked	Yes	Estimated booking value
AddToCart	Shopping interest	No	Optional
ViewContent	Product/service view	No	None
Contact	Phone or message click	Usually secondary	Estimated

10.5 Primary Event Selection

For e-commerce:

Optimise toward Purchase when purchase tracking is accurate.

For a service business:

Optimise toward Lead or Schedule when those events represent real submissions.

For a local store:

Optimise toward a measurable action that reflects the business objective, such as calls, messages, bookings or purchases where supported.

Do not optimise toward PageView when the real objective is sales unless the campaign is deliberately a traffic campaign.

11. Conversions API

11.1 What Is Conversions API?

Conversions API creates a more direct connection between business data and Meta's systems.

Data may come from:

- Website server
- E-commerce platform
- CRM
- Application
- Business messages
- Offline transactions

Meta recommends considering Conversions API together with the Pixel for website events. [Meta Conversions API overview](#)

11.2 Benefits

Conversions API may help:

- Improve event reliability
- Reduce dependence on browser-based tracking
- Support event matching
- Measure later customer outcomes
- Send qualified-lead or sales information
- Improve campaign optimisation

It is not a method for avoiding privacy requirements or platform controls.

11.3 Setup Options

Possible methods include:

- Partner integration
- Conversions API Gateway
- Direct developer integration
- CRM integration
- Supported platform integration

11.4 Pixel and Conversions API Deduplication

When the same event is sent through both Pixel and Conversions API, correct deduplication is essential.

The browser and server versions should generally use:

- The same event name
- The same event ID
- Consistent event information

Without correct deduplication, one purchase may be recorded twice.

11.5 Lead-Quality Feedback

A lead campaign may produce these CRM stages:

- New Lead
- Contacted
- Qualified
- Appointment
- Customer
- Invalid
- Duplicate

Sending later-stage outcomes through an approved integration can help distinguish cheap leads from valuable leads.

12. Testing Meta Tracking

12.1 Test Events Procedure

1. Open Events Manager.
2. Select the correct dataset.
3. Open Test Events.
4. Enter the website URL where required.
5. Open the website.
6. Perform one action:
 - Product view
 - Add to cart

- Form submission
 - Purchase
7. Return to Events Manager.
 8. Confirm the expected event appears.
 9. Check parameters.
 10. Repeat for mobile.
 11. Check Diagnostics.
 12. Resolve warnings and errors.

12.2 Purchase Event Checklist

Confirm that Purchase sends:

- Event name
- Value
- Currency
- Product identifiers where applicable
- Transaction or event ID
- Correct event time
- One purchase event per transaction

12.3 Lead Event Checklist

Confirm that Lead fires:

- After successful form completion
- Not when the form first opens
- Not when validation fails
- Not multiple times on refresh
- With correct page and event details

12.4 Meta Pixel Helper

A browser-based diagnostic extension may help identify Pixel events on a page.

Use it to check:

- Pixel detected
- Event name
- Duplicate events
- Parameter problems
- Installation warnings

Events Manager remains important for final validation.

13. Privacy and Consent

Businesses should:

- Publish a clear privacy policy.
- Explain relevant data collection.
- Obtain consent where legally required.
- Avoid sending prohibited or sensitive data.
- Protect customer lists.
- Limit user access.
- Follow Meta Business Tools Terms.
- Follow local data-protection laws.
- Avoid uploading customer data without proper authority.

Do not send information such as passwords, sensitive form contents or unsupported personal details through tracking events.

14. Audiences in Meta Ads

14.1 Broad Audience

Uses limited controls such as:

- Location
- Minimum age
- Language
- Essential exclusions

Broader targeting can give the delivery system more opportunities, especially when tracking and creative are strong.

14.2 Core or Detailed Audience

May use:

- Location
- Age

- Language
- Interests
- Behaviours
- Demographic signals

Availability varies by industry and policy.

14.3 Advantage+ Audience

Advantage+ Audience can use audience suggestions while allowing delivery to expand when the system predicts better results. Certain controls, such as location and minimum age, can remain stricter according to available settings. [Meta Advantage+ Audience overview](#)

14.4 Custom Audience

Custom Audiences can be created from sources such as:

- Website visitors
- Customer lists
- Application activity
- Facebook engagement
- Instagram engagement
- Video viewers
- Lead-form interactions
- Catalogue activity

14.5 Lookalike Audience

A Lookalike Audience helps reach new people who are similar to a selected source audience. [Meta audience overview](#)

Possible source audiences:

- Purchasers
- Qualified leads
- High-value customers
- Repeat customers
- Website converters
- Engaged customers

A source of qualified customers is usually more meaningful than a source containing every visitor.

15. Creating a Website Custom Audience

15.1 Example Audiences

E-commerce

- All website visitors: 30 days
- Product viewers: 14 days
- Add-to-cart users: 14 days
- Checkout starters: 7 days
- Purchasers: 180 days

Service business

- All website visitors: 30 days
- Service-page visitors: 30 days
- Lead-page visitors: 14 days
- Form starters: where measurable
- Completed leads: 180 days

15.2 General Setup

1. Open Audiences.
2. Select **Create audience**.
3. Choose **Custom Audience**.
4. Select Website.
5. Select the dataset or Pixel.
6. Choose the event or URL rule.
7. Select retention period.
8. Add exclusions if required.
9. Name the audience clearly.
10. Create it.

Example name:

CA | Website | AddToCart | 14D | Exclude Purchase

15.3 Audience Exclusion

For a cart-retargeting campaign:

Include:

AddToCart – 14 days

Exclude:

Purchase – 30 days

This avoids advertising the same purchase reminder to recent buyers unless a cross-sell strategy is intended.

16. Creating Engagement Audiences

Possible sources include:

- Instagram account engagement
- Facebook Page engagement
- Video views
- Lead-form opening or submission
- Advertisement engagement

16.1 Video-Viewer Audience Example

1. Create a Custom Audience.
2. Select Video.
3. Choose the engagement level.
4. Select one or more relevant videos.
5. Set the retention period.
6. Name the audience.
7. Save.

Example:

CA | Video Viewers | Course Videos | 50% | 30D

Use higher-engagement viewers for more focused retargeting.

17. Creating a Lookalike Audience

17.1 General Procedure

1. Open Audiences.
2. Select **Create Audience**.
3. Choose **Lookalike Audience**.
4. Select a source.
5. Select the target country or location.
6. Select audience size.
7. Create the audience.
8. Use it as a test audience or suggestion according to campaign setup.

17.2 Source Selection Priority

Stronger sources may include:

1. High-value customers
2. Purchasers
3. Qualified leads
4. Completed appointments
5. Add-to-cart users
6. Website visitors
7. Social engagement

The exact best source depends on data volume and business quality.

17.3 Naming Convention

LAL | Purchasers 180D | India | 1%

or:

LAL | Qualified Leads | Delhi NCR | Test

18. Placements

Placements are locations where advertisements can appear.

Possible placement groups include:

- Facebook Feed
- Instagram Feed
- Facebook Stories
- Instagram Stories
- Facebook Reels
- Instagram Reels
- Messenger
- Audience Network
- Other eligible surfaces

18.1 Advantage+ Placements

Advantage+ Placements allow Meta to distribute advertisements across eligible placements.

This can be suitable when:

- Creative assets fit different placements.
- Tracking is reliable.
- The objective supports automated delivery.
- The campaign has enough budget and opportunity.

18.2 Manual Placements

Manual placements may be used when:

- Creative is designed for one environment.
- A placement is unsuitable.
- Brand or operational restrictions exist.
- A controlled test is required.
- Historical evidence supports exclusion.

18.3 Creative by Placement

Prepare:

- Vertical video for Reels and Stories
- Square or portrait creative for feeds
- Readable text within safe zones
- Captions for sound-off viewing
- Short and clear opening

Do not crop one horizontal image into every placement without checking it.

19. Meta Advertisement Formats

19.1 Single Image

Suitable for:

- Clear offers
- Local promotions
- Lead magnets
- Simple service messages

19.2 Video

Suitable for:

- Demonstrations
- Customer stories
- Product use
- Education
- Problem-solution advertising

19.3 Carousel

Suitable for:

- Multiple products
- Product features
- Process steps
- Before-and-after examples
- Different services

19.4 Collection and Catalogue Formats

Suitable for e-commerce businesses with a properly configured catalogue.

19.5 Instant Experience

A mobile-focused expanded experience available in relevant setups.

20. Meta Advertising Copy

20.1 Main Copy Components

- Primary text
- Headline
- Description
- CTA
- Creative text
- Destination

20.2 AIDA Framework

Attention

Gain attention with a relevant problem or result.

Interest

Explain why the issue matters.

Desire

Show the benefit and proof.

Action

Give the next step.

Example

Want to start a digital marketing career but lack practical experience?

Build skills through SEO, social media, Google Ads, Meta Ads and analytics projects with trainer guidance.

Book a free counselling session to review the curriculum.

20.3 Problem–Solution Copy

Receiving enquiries but struggling to manage them?

Our CRM setup service helps local businesses organise leads, automate follow-ups and monitor sales activity.

Request a free consultation.

20.4 E-commerce Copy

Lightweight running shoes designed for daily training and comfortable movement. Explore available colours and sizes with secure online checkout.

Shop Now.

20.5 Local-Store Copy

Looking for a furniture showroom in Noida? Explore sofas, beds and dining sets at our local store. View current timings and get directions.

Visit Store.

20.6 Copy Checklist

- Clear audience
- Accurate offer
- Main benefit
- Genuine proof
- Correct location
- Suitable CTA
- No unsupported guarantee
- No confusing language
- Matches landing page
- Correct spelling

21. Creative Development

Meta advertising depends heavily on creative quality.

21.1 Creative Brief

Record:

- Business objective
- Audience
- Problem
- Offer
- Main message
- Format
- Hook
- Visual concept
- Proof
- CTA
- Placement
- Duration
- Brand requirements

21.2 Video Advertisement Structure

First 1–3 seconds

Show:

- Product
- Problem
- Result
- Relevant question
- Strong demonstration

Middle

Explain:

- Benefit
- Process
- Difference
- Proof
- Product use

End

Show:

- Brand
- Offer
- CTA
- Next step

21.3 Creative Angles

A creative angle is the main persuasive approach.

Examples:

- Problem-solution
- Demonstration
- Testimonial
- Founder story
- Comparison
- Product benefit
- Convenience
- Price or offer
- Educational
- Before and after, used accurately

21.4 Creative Testing Matrix

Variable	Version A	Version B
Hook	"Struggling to get leads?"	"Reduce missed enquiries"
Format	Customer video	Product demonstration
CTA	Learn More	Book Now
Proof	Review	Case-study statistic
Offer	Free consultation	Free audit

Avoid changing every element simultaneously if you want to understand what caused the difference.

22. Creating an Instant-Form Lead Campaign

Instant forms open within Facebook or Instagram and can pre-fill some user information.

Meta distinguishes instant forms from website forms. Instant forms provide a fast mobile experience; website forms may be more suitable when users need detailed information, bookings or complex actions. [Meta lead ads with forms](#)

22.1 Best Use Cases

- Course enquiries
- Property enquiries
- Consultation requests
- Automobile test drives
- Event registrations
- Insurance enquiries, subject to policy
- Home-service quotations
- Local-business leads

22.2 Campaign Setup

Campaign level

1. Open Ads Manager.
2. Click **Create**.
3. Select **Leads**.
4. Enter a clear campaign name.

Example:

Leads | Digital Marketing Course | Delhi | Instant Form

5. Select the correct special advertisement category if applicable.
6. Review Advantage+ leads settings.
7. Choose campaign or ad-set budget.
8. Continue.

Ad set level

1. Select **Instant Forms** as the conversion location.
2. Select the Facebook Page.
3. Choose the performance goal.
4. Set budget and schedule.
5. Select location.
6. Set minimum age and language where required.
7. Add audience suggestions or detailed targeting.
8. Exclude existing leads where appropriate.
9. Select placements.
10. Review optimisation and delivery.

Meta's current guidance uses the Leads objective, Instant Form conversion location and lead-related performance goals. [Meta instant-form setup](#)

Advertisement level

1. Select the Facebook Page.
2. Select the Instagram account.
3. Choose the format.
4. Upload the image or video.
5. Add primary text.
6. Add headline.
7. Select CTA.
8. Create or select the Instant Form.
9. Add tracking information where appropriate.
10. Preview every placement.
11. Publish.

23. Creating an Instant Form

23.1 Form Type

Depending on available options, the form may prioritise:

- Higher volume
- Higher intent
- Richer creative or additional context

A higher-intent form may include a review step, helping users confirm information before submission.

23.2 Form Structure

Introduction

Explain:

- What the user receives
- Why the form is needed
- What happens next

Questions

Possible questions:

- Full name
- Phone
- Email
- City

- Service requirement
- Budget range
- Preferred schedule
- Experience level

Privacy policy

Provide the organisation's valid privacy-policy URL.

Consent or disclaimer

Add necessary consent language according to the business, location and legal requirements.

Completion screen

Tell the lead:

- Submission succeeded
- Who will contact them
- Expected response time
- Contact method
- Next action

23.3 Example Education Form

Headline

Get the Digital Marketing Course Details

Description

Submit your details to receive the curriculum and a free career-counselling call.

Questions

- Full name
- Phone
- Email
- Current status:
 - College student
 - Graduate
 - Working professional
- Preferred learning mode:
 - Classroom
 - Online

Completion message

Thank you. Our counsellor will contact you by phone within one working day. You can also view the course details on our website.

23.4 Form Question Strategy

Ask enough questions to qualify leads without creating unnecessary friction.

Too few questions

May produce:

- More leads
- Lower initial cost
- More unqualified leads

Too many questions

May produce:

- Fewer leads
- Higher form abandonment
- More qualification information

Test based on qualified-lead rate, not only form submissions.

23.5 Sensitive Information

Do not request prohibited or unnecessary sensitive information through lead forms.

Collect only information required for the stated business purpose.

24. Accessing and Managing Instant-Form Leads

24.1 Lead Retrieval Options

Possible methods include:

- Leads Center
- Page lead-download tools
- CRM integration
- Supported automation partner
- Meta API integration

24.2 Manual Download Risk

Manual downloads can delay follow-up.

If leads are downloaded once per day, a person who enquired in the morning may wait several hours.

A CRM or approved automation can improve response speed.

24.3 Lead Follow-Up Process

1. Send immediate acknowledgement.
2. Assign the lead.
3. Make the first contact attempt.
4. Ask qualification questions.
5. Update lead status.
6. Schedule the next action.
7. Record sale or rejection.
8. Report the outcome to marketing.

24.4 Example Lead Statuses

- New
- Contacted
- No Answer
- Interested
- Qualified
- Appointment Booked

- Customer
- Not Interested
- Invalid
- Duplicate

24.5 Response Time

Define a realistic standard.

Example:

- Automated acknowledgement: Immediate
- First human contact: Within 15 minutes during working hours
- Second attempt: Same day
- Follow-up sequence: According to the sales process

Faster response does not justify excessive calling or messaging. Respect consent and communication preferences.

25. Website Lead-Generation Campaign

Website forms may be better when users need to:

- Book an appointment
- Generate a quotation
- View detailed information
- Select a schedule
- Complete a multi-step process
- Use a secure business system

25.1 Setup Process

Campaign

1. Create a campaign.
2. Select **Leads**.
3. Name the campaign.
4. Select special category if applicable.

Ad set

1. Select **Website** as conversion location.
2. Select the dataset.
3. Choose the Lead or Schedule event.
4. Set budget and schedule.
5. Configure audience.
6. Configure placements.
7. Confirm destination.

Advertisement

1. Select Page and Instagram identity.
2. Add creative.
3. Add text and headline.
4. Select CTA.
5. Add landing-page URL.
6. Add tracking parameters.
7. Preview.
8. Publish.

Meta's current lead guidance describes website forms under the Leads objective with Website as the conversion location. [Meta website-form lead setup](#)

25.2 Website Lead Page Checklist

- Advertisement and page match.
- Headline explains the offer.
- Benefits are clear.
- Form is mobile-friendly.
- Trust elements are genuine.
- Privacy policy is accessible.
- Form success triggers the correct event.
- Thank-you page explains the next step.
- Page loads quickly.
- Sales team receives the lead.

26. Lead Campaign Using Messages

Meta may allow lead conversations through:

- Messenger

- Instagram Direct
- WhatsApp-supported destinations

26.1 Suitable Businesses

- Local services
- Restaurants
- Education
- Real estate
- Salons
- Repair services
- Appointment-based businesses
- Custom-product businesses

26.2 Campaign Process

1. Create a Leads campaign.
2. Select the available messaging conversion location.
3. Choose the messaging application.
4. Select the correct Page or account.
5. Set audience and location.
6. Select placements.
7. Create the advertisement.
8. Build the automated question flow.
9. Set a greeting.
10. Add qualifying questions.
11. Explain the next step.
12. Test the complete conversation.
13. Publish.
14. Assign staff to respond.

26.3 Conversation Flow Example

Greeting

Hello. Thank you for your interest in our digital marketing course. Please answer a few questions so we can guide you correctly.

Question 1

What is your current status?

- Student
- Graduate
- Working professional

Question 2

Which learning mode do you prefer?

- Classroom
- Online
- Not sure

Question 3

Which city are you located in?

Completion

Thank you. A counsellor will respond during working hours. Please share your preferred contact time.

Meta recommends keeping automated lead chats focused, beginning with easier qualifying questions and setting clear expectations. [Meta messaging lead guidance](#)

27. Call Lead Campaign

Call campaigns encourage users to call the business.

27.1 Suitable Businesses

- Emergency services
- Clinics, subject to policy
- Repair services
- Local stores
- Appointment businesses
- Professional services

27.2 Preparation

Before launch:

- Confirm the phone number.
- Train the call team.
- Define working hours.
- Create a call script.

- Record call outcomes.
- Configure call-related measurement where available.
- Ensure missed calls are returned.

27.3 Campaign Checklist

- Leads objective
- Calling conversion location where available
- Correct phone number
- Local audience
- Ads scheduled during answerable hours
- Clear service and location
- Strong call-focused creative
- Staff ready to answer

A call click is not automatically a qualified customer. Record actual call quality.

28. E-commerce Sales Campaign

28.1 E-commerce Preparation

Confirm:

- Pixel and Conversions API work.
- Purchase sends value and currency.
- Product catalogue is available where required.
- Product pages work.
- Stock is accurate.
- Checkout is mobile-friendly.
- Shipping and returns are clear.
- Product IDs match catalogue IDs.
- Privacy and consent requirements are addressed.

28.2 Catalogue Setup

A catalogue stores product information such as:

- Product ID
- Title
- Description
- Price
- Availability

- Image
- Product URL
- Brand
- Category

Products may be added through:

- E-commerce partner integration
- Data feed
- Scheduled feed
- Manual methods
- API integration

28.3 Sales Campaign Setup

Campaign level

1. Open Ads Manager.
2. Click Create.
3. Select **Sales**.
4. Name the campaign.

Example:

Sales | Running Shoes | India | Prospecting

5. Review catalogue and Advantage+ options.
6. Select the budget approach.
7. Continue.

Ad set level

1. Select Website as conversion location.
2. Choose the dataset.
3. Select Purchase event.
4. Set location.
5. Configure audience.
6. Exclude recent purchasers where appropriate.
7. Select placements.
8. Set schedule and budget if controlled here.

Advertisement level

1. Select identity.
2. Select single image, video, carousel or catalogue format.
3. Add creative.

4. Add primary text and headline.
5. Add product or category URL.
6. Select Shop Now.
7. Add tracking parameters.
8. Preview.
9. Publish.

28.4 Product Campaign Structure

Possible structure:

Campaign 1: Prospecting – New Customers
Campaign 2: Retargeting – Product Viewers
Campaign 3: Retargeting – Cart Abandoners
Campaign 4: Existing Customers – Cross-Sell

Do not create too many campaigns when the budget is small.

28.5 E-commerce Creative Angles

- Product demonstration
- Customer testimonial
- Main benefit
- Product comparison
- Lifestyle use
- Unboxing
- Problem-solution
- Collection showcase
- Limited promotion, if genuine

28.6 E-commerce Metrics

- Purchase value
- Purchase ROAS
- Cost per purchase
- Add-to-cart rate
- Checkout rate
- Purchase conversion rate
- Average order value
- New-customer acquisition cost
- Product margin
- Return and cancellation rate

29. Service-Business Lead Campaign

29.1 Example Business

Home-cleaning service in Bangalore

Campaigns:

Campaign 1: Leads | Instant Form | Bangalore

Campaign 2: Leads | Website | Bangalore

Campaign 3: Retargeting | Website and Engagement

29.2 Audience Plan

Cold audience

- Bangalore service area
- Suitable age
- Relevant audience suggestions
- Broad or Advantage+ delivery test

Warm audience

- Website visitors
- Instagram engagers
- Facebook Page engagers
- Video viewers
- Form openers who did not submit

Existing leads

Exclude where appropriate to avoid repeated acquisition advertising.

29.3 Creative Examples

Problem-solution video

Busy schedule and no time for deep cleaning? Book trained home-cleaning professionals in Bangalore.

Process carousel

1. Select service
2. Choose time
3. Receive confirmation
4. Team visits
5. Service completed

Testimonial

Use only a genuine customer testimonial with appropriate permission.

29.4 Lead Qualification

Possible form questions:

- Service required
- Area
- Property size
- Preferred date
- Phone number

29.5 Measure Qualified CPL

Suppose:

- Ad cost: ₹30,000
- Leads: 300
- Qualified leads: 90
- Customers: 30

Raw CPL = ₹30,000 ÷ 300 = ₹100

Qualified CPL = ₹30,000 ÷ 90 = ₹333.33

Customer Acquisition Cost = ₹30,000 ÷ 30 = ₹1,000

The ₹100 raw CPL does not represent actual lead quality.

30. Local Store Campaign

30.1 Suitable Objectives

A local store may use:

- Awareness
- Leads
- Traffic
- Engagement
- Sales, where transactions are measurable

Possible actions:

- Calls
- Messages
- Direction-page visits
- Offer enquiries
- Appointments
- In-store purchases
- Coupon redemptions

30.2 Location Targeting

Target only the genuine service or travel area.

Consider:

- Customer travel distance
- City density
- Product value
- Delivery area
- Competition
- Store type

Example:

Furniture showroom: Wider city radius
Neighbourhood bakery: Smaller local radius

30.3 Local Creative

Include:

- Store exterior
- Interior
- Products
- Address area
- Opening hours
- Map-related context
- Local offer
- Phone or message CTA

30.4 Local Advertisement Example

Looking for a furniture showroom in Noida?

Explore sofas, beds and dining sets at our Sector 18 store. Open Monday–Saturday from 10 AM to 8 PM.

Message us for directions and current availability.

30.5 Local Lead Form

Questions:

- Name
- Phone
- Product interest
- Preferred visit date
- Area

Completion:

Thank you. Our store team will contact you to confirm availability and share directions.

30.6 Measuring Store Results

Possible methods:

- Unique promotional code
- In-store “How did you hear about us?” field
- CRM source

- Point-of-sale source
- Conversions API
- Offline or dataset event integration
- Call tracking
- Message records

Do not claim that every ad engagement caused a store visit.

31. Retargeting

Retargeting reaches people who already interacted with the business. Meta supports Custom Audiences from sources such as customer lists, Pixel data, app activity and engagement. [Meta retargeting guide](#)

31.1 E-commerce Retargeting

Product viewer

Audience:

ViewContent – 14 days
Exclude Purchase – 30 days

Message:

Still considering these running shoes? Review the available sizes, delivery details and customer feedback.

Cart abandoner

Audience:

AddToCart – 7 days
Exclude Purchase – 30 days

Message:

Your selected items may still be available. Return to complete checkout.

Do not falsely claim that an item is reserved.

31.2 Service Retargeting

Audience:

- Service-page visitors
- Video viewers
- Form openers
- Instagram engagers

Message:

Still comparing digital marketing courses? View the practical projects, complete curriculum and learning options before making your decision.

31.3 Lead-Form Retargeting

Create separate audiences for:

- People who opened but did not submit
- People who submitted

Advertise reminders to non-submitters and exclude submitters from acquisition ads where appropriate.

31.4 Frequency

Review frequency and creative fatigue.

Warning signs:

- Rising frequency
- Falling CTR
- Rising cost per result
- Negative comments
- Declining conversion rate

Refresh creative or adjust audience and budget when necessary.

32. Campaign Budget Approaches

32.1 Ad-Set Budget

Budget is controlled separately for each ad set.

Useful when:

- Testing specific audiences
- Guaranteeing expenditure per segment
- Comparing different locations
- Running controlled experiments

32.2 Campaign Budget

Meta distributes campaign budget between ad sets according to predicted opportunity.

Useful when:

- Ad sets share the same objective
- The system has enough opportunity
- Flexible distribution is acceptable
- The advertiser wants automated allocation

32.3 Test Budget Calculation

Suppose expected CPL is ₹400 and the advertiser wants approximately 20 initial leads:

Initial test budget = ₹400 × 20 = ₹8,000

This does not guarantee 20 leads. It is a planning estimate.

32.4 Avoid Excessive Fragmentation

A ₹1,000 daily budget split across ten ad sets gives each ad set limited opportunity.

Start with a simpler structure:

- One campaign

- One or two ad sets
- Three to five meaningful creatives

Expand after obtaining evidence.

33. Campaign Naming Convention

Use a consistent structure.

Campaign

Objective | Offer | Location | Funnel Stage

Example:

Leads | Digital Marketing Course | Delhi | Prospecting

Ad set

Audience | Location | Age | Placement

Example:

Broad | Delhi NCR | 18–30 | Advantage+

Advertisement

Format | Angle | Version

Example:

Video | Student Projects | V1

Clear naming improves reporting and reduces errors.

34. Creating a Campaign in Ads Manager

34.1 Campaign-Level Procedure

1. Open Meta Ads Manager.
2. Select the correct ad account.
3. Click **Create**.
4. Select the objective.
5. Enter the campaign name.
6. Select a special advertisement category if applicable.
7. Review Advantage+ settings.
8. Choose budget location.
9. Configure a test if intentionally planned.
10. Continue.

34.2 Ad-Set-Level Procedure

1. Enter the ad-set name.
2. Select conversion location.
3. Select Page, app, website or messaging destination.
4. Select dataset or Pixel.
5. Select conversion event.
6. Select performance goal.
7. Set budget if controlled here.
8. Set start and end date.
9. Select location.
10. Set age and language where required.
11. Add audience suggestions or targeting.
12. Add Custom Audience exclusions.
13. Select placements.
14. Review estimated delivery carefully.
15. Continue.

34.3 Advertisement-Level Procedure

1. Enter the advertisement name.
2. Select Facebook Page.
3. Select Instagram account.
4. Choose new or existing content.
5. Select format.
6. Upload media.
7. Add primary text.

8. Add headline and description.
9. Select CTA.
10. Add destination.
11. Add tracking parameters.
12. Select or create form where relevant.
13. Preview every major placement.
14. Check spelling, cropping and URL.
15. Publish.

34.4 After Publishing

Check:

- Processing
- In review
- Active
- Rejected
- Error
- Limited
- Scheduled

Do not assume publication means immediate delivery.

35. Advertisement Review and Policy

Meta reviews advertisements, creatives, landing pages and business practices.

Common issues may involve:

- Misleading claims
- Prohibited products
- Restricted products
- Discriminatory practices
- Personal-attribute language
- Inappropriate imagery
- Unclear business identity
- Broken landing pages
- Circumventing review
- Low-quality or disruptive experiences
- Unsupported before-and-after claims
- Incorrect special advertisement category
- Data-collection violations

35.1 Personal-Attribute Language

Avoid copy that directly asserts sensitive personal characteristics.

Risky style:

Are you unemployed and struggling because of your age?

Safer style:

Explore practical career-development training for students, graduates and working professionals.

The final acceptability depends on the complete advertisement, industry and policy.

35.2 If an Advertisement Is Rejected

1. Open the rejection reason.
2. Read the relevant policy.
3. Review creative and copy.
4. Review landing page.
5. Correct the genuine issue.
6. Request review if the advertisement is compliant.
7. Do not repeatedly duplicate rejected advertisements to bypass review.
8. Record the outcome.

36. Meta Ads Metrics

36.1 Reach

Number of unique accounts exposed to an advertisement.

36.2 Impressions

Total times the advertisement was displayed.

36.3 Frequency

Frequency = Impressions ÷ Reach

Example:

$$30,000 \text{ impressions} \div 10,000 \text{ reach} = 3$$

The average person saw the advertisement approximately three times.

36.4 CPM

Cost per 1,000 impressions.

$$\text{CPM} = \text{Amount Spent} \div \text{Impressions} \times 1,000$$

36.5 Link CTR

$$\text{Link CTR} = \text{Link Clicks} \div \text{Impressions} \times 100$$

36.6 CPC

$$\text{CPC} = \text{Amount Spent} \div \text{Link Clicks}$$

36.7 Landing-Page View Rate

$$\text{Landing-Page View Rate} = \text{Landing-Page Views} \div \text{Link Clicks} \times 100$$

A large difference between clicks and landing-page views may indicate:

- Slow page
- Accidental clicks
- Tracking problems
- Broken page
- Weak connection

36.8 Lead Conversion Rate

$$\text{Lead Conversion Rate} = \text{Leads} \div \text{Landing-Page Views} \times 100$$

For instant forms, calculate according to form opens or relevant platform data where available.

36.9 Cost per Lead

$\text{CPL} = \text{Amount Spent} \div \text{Leads}$

36.10 Cost per Qualified Lead

$\text{CPQL} = \text{Amount Spent} \div \text{Qualified Leads}$

36.11 Cost per Purchase

$\text{Cost per Purchase} = \text{Amount Spent} \div \text{Purchases}$

36.12 ROAS

$\text{ROAS} = \text{Purchase Conversion Value} \div \text{Amount Spent}$

36.13 Thumb-Stop and Video Metrics

Depending on available reporting, examine:

- 3-second video plays
- Video plays
- Percentage watched
- ThruPlay or relevant completed-view metric
- Average watch time

Use these to diagnose creative attention, not as the only business result.

37. Diagnosing Campaign Performance

37.1 High CPM

Possible causes:

- Narrow audience
- Competitive market
- Seasonal demand

- Expensive placements
- Weak relevance
- Policy or quality limitations

Actions:

- Review audience size.
- Test broader delivery.
- Improve creative.
- Review placement strategy.
- Check seasonality.
- Avoid unnecessary audience overlap.

37.2 Low CTR

Possible causes:

- Weak hook
- Irrelevant audience
- Unclear offer
- Poor creative
- Excessive frequency
- Weak CTA

Actions:

- Test new creative angles.
- Improve opening.
- Clarify audience and offer.
- Refresh advertisements.
- Review placement-specific cropping.

37.3 Good CTR but Few Landing-Page Views

Possible causes:

- Slow website
- Broken URL
- Tracking problem
- Accidental clicks
- Poor mobile experience

Actions:

- Test the URL.
- Improve speed.

- Check Pixel.
- Review placement performance.
- Compare devices.

37.4 Many Leads but Poor Quality

Possible causes:

- Form too easy
- Weak qualification
- Misleading creative
- Broad promise
- Wrong audience
- Slow follow-up
- Duplicate or fake data

Actions:

- Add qualifying questions.
- Use higher-intent form options.
- Clarify price or requirements.
- Improve targeting controls.
- Connect CRM.
- Optimise toward qualified leads where available.
- Improve response speed.

37.5 Add to Carts but Few Purchases

Possible causes:

- Unexpected shipping
- Checkout error
- Weak trust
- Limited payment methods
- High price
- Tracking issue
- Product unavailable

Actions:

- Test checkout.
- Review shipping transparency.
- Review payment failures.
- Retarget cart users.
- Check purchase event.
- Analyse device and page speed.

37.6 Campaign Not Spending

Possible causes:

- Advertisement in review
- Payment failure
- Audience too narrow
- Low bid or cost control
- Schedule problem
- Account restriction
- Conversion event issue
- Low-quality or rejected creative

Actions:

- Check Delivery column.
- Check Account Quality.
- Check billing.
- Review schedule.
- Review audience.
- Review optimisation goal.
- Check event activity.
- Read specific error messages.

38. Daily, Weekly and Monthly Optimisation

38.1 First-Day Checks

- Correct campaign is active.
- Billing works.
- Advertisement is approved.
- Budget is correct.
- Location is correct.
- Form or URL works.
- Leads are reaching the team.
- Pixel events are active.
- No accidental duplicate campaign is running.

38.2 Daily Checks During Early Launch

- Spend
- Delivery status
- Leads or purchases
- Form or website function
- Comments
- Message response
- Major tracking errors
- Lead quality
- Payment issues

Do not make major changes every few hours.

38.3 Weekly Checks

- Creative performance
- Audience performance
- Placements
- Frequency
- CTR
- Landing-page views
- CPL
- Qualified CPL
- Purchase value
- Lead status
- Comments and feedback
- Budget allocation
- Tracking diagnostics

38.4 Monthly Checks

- Customer acquisition cost
- Revenue and ROAS
- Lead-to-customer rate
- Profitability
- Audience overlap
- Creative fatigue
- Retargeting windows
- CRM feedback
- Catalogue quality
- Conversion setup
- Campaign structure
- Next testing plan

39. Creative Testing Process

39.1 Step-by-Step Test

1. Define the objective.
2. Select one audience or controlled setup.
3. Create three to five distinct creative concepts.
4. Keep the offer consistent.
5. Launch with sufficient budget.
6. Allow meaningful delivery.
7. Compare:
 - Cost per result
 - CTR
 - Conversion rate
 - Lead quality
 - Purchase value
8. Pause clearly unsuitable versions.
9. Create new variations from the strongest concept.
10. Record the learning.

39.2 Test Different Concepts, Not Only Colours

Weak test:

- Blue button vs dark-blue button

Stronger test:

- Customer testimonial vs product demonstration
- Career outcome vs practical-project angle
- Founder explanation vs student story
- Image vs video

40. A/B Testing

A/B tests compare controlled variations.

Possible tests:

- Audience
- Creative

- Placement
- Instant form vs website form
- Broad vs Lookalike
- Offer
- Landing page

40.1 Test Requirements

- Clear hypothesis
- One important variable
- Same objective
- Suitable budget
- Defined success metric
- Sufficient time and data
- Written conclusion

Example hypothesis

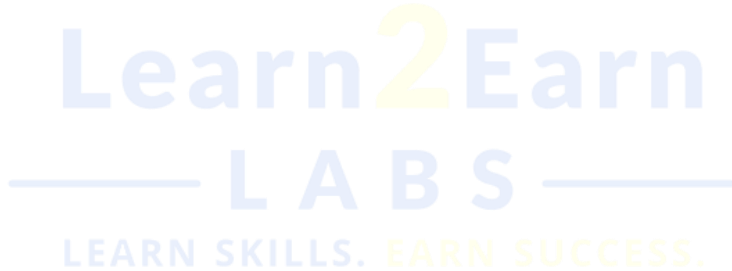
A higher-intent form will reduce total lead volume but improve the qualified-lead rate.

Success metric:

Cost per qualified lead

Not merely:

Cost per submitted form



41. Lead-Quality Reporting

41.1 Lead Funnel



41.2 Example Report

Stage	Number	Rate from previous stage
Leads	500	—
Contacted	400	80%
Qualified	150	37.5%
Appointments	80	53.3%
Customers	30	37.5%

Advertising cost:

₹60,000

Raw CPL = ₹60,000 ÷ 500 = ₹120

Qualified CPL = ₹60,000 ÷ 150 = ₹400

Customer Acquisition Cost = ₹60,000 ÷ 30 = ₹2,000

A campaign should be evaluated using the deepest reliable business outcome.

42. Meta Ads Reporting

42.1 Useful Columns

Create a custom report containing:

- Delivery
- Budget
- Amount spent
- Reach
- Impressions
- Frequency
- CPM
- Link clicks
- CTR
- CPC
- Landing-page views
- Leads
- Cost per lead
- Purchases
- Cost per purchase

- Purchase value
- ROAS

Add business data:

- Qualified leads
- Appointments
- Customers
- Revenue
- Refunds
- Profit estimate

42.2 Breakdowns

Analyse by:

- Age
- Gender, where appropriate and available
- Region
- Placement
- Device
- Time
- Advertisement
- Ad set
- Campaign

Do not make important decisions from very small samples.

42.3 Monthly Report Structure

1. Reporting period
2. Objectives
3. Budget and expenditure
4. Main results
5. Funnel performance
6. Campaign comparison
7. Audience comparison
8. Creative comparison
9. Placement performance
10. Lead quality
11. Revenue and ROAS
12. Tracking issues
13. Completed changes
14. Key learning
15. Next-month plan

43. Common Beginner Mistakes

- Boosting posts without defining measurement
- Using the wrong objective
- Creating an ad account with incorrect currency
- Sharing personal passwords
- Launching without Pixel testing
- Installing the Pixel more than once
- Duplicating Purchase or Lead events
- Optimising for PageView instead of sales
- Creating too many ad sets with a small budget
- Using one creative for every placement
- Selecting interests unrelated to the offer
- Ignoring audience exclusions
- Focusing only on cheap leads
- Downloading leads too slowly
- Failing to contact leads
- Not tracking qualified leads
- Sending users to a weak homepage
- Requesting too much personal information
- Making unsupported claims
- Changing campaigns every day
- Ignoring comments on advertisements
- Increasing budget before checking profitability
- Retargeting recent purchasers with acquisition ads
- Evaluating e-commerce campaigns without returns and margins

44. Beginner Launch Checklist

Business Assets

- Facebook Page complete
- Instagram professional account connected
- Business Portfolio configured
- Ad account created
- Correct currency
- Correct time zone
- Payment method active
- Two-factor authentication enabled
- User access reviewed

Tracking

- Pixel or dataset connected
- Conversions API considered or configured
- Events tested
- Lead event fires correctly
- Purchase value and currency correct
- No duplicate events
- Ad account connected to dataset
- Privacy and consent reviewed

Campaign

- Correct objective
- Correct conversion location
- Correct event
- Clear campaign name
- Special advertisement category selected if applicable
- Suitable audience
- Correct location
- Appropriate placements
- Sustainable budget
- Clear schedule
- Existing leads or purchasers excluded where appropriate

Advertisement

- Correct Facebook Page
- Correct Instagram account
- Creative fits placements
- Strong opening
- Accurate copy
- Clear CTA
- Correct URL or form
- Tracking parameters
- Mobile preview checked
- Policy reviewed

Lead Operations

- Form tested
 - Privacy link works
 - Completion message explains next step
 - CRM or lead retrieval works
 - Staff receive notifications
 - Response-time target exists
 - Lead statuses defined
 - Sales outcomes recorded
-



45. Practical Project 1: Instant-Form Campaign

Create a campaign for a training institute, property consultant or local service.

Deliverables

- Business overview
- Campaign objective
- Target audience
- Campaign structure
- Three creative concepts
- Primary text and headlines
- Instant form
- Qualification questions
- Privacy and consent plan
- Completion message
- Lead-retrieval process
- Follow-up script
- Budget
- CPL and qualified-CPL target
- Reporting sheet

46. Practical Project 2: Website Lead Campaign

Create a website lead campaign for a service business.

Deliverables

- Service overview
- Landing-page wireframe
- Pixel setup plan
- Lead-event setup
- Audience plan
- Retargeting audience
- Advertisement copy
- Creative storyboard
- Conversion test evidence
- Budget
- Optimisation plan
- Lead-quality dashboard



47. Practical Project 3: E-commerce Sales Campaign

Create a sales campaign for an online store.

Deliverables

- Product categories
- Catalogue plan
- Pixel event map
- Conversions API plan
- Purchase-event test
- Prospecting campaign
- Product-view retargeting
- Cart-abandonment retargeting
- Recent-purchaser exclusion
- Five creative angles
- Budget
- ROAS target based on margin
- Product-performance report

48. Practical Project 4: Local Store Campaign

Create a campaign for a furniture store, salon, bakery, gym or training centre.

Deliverables

- Store objective
- Local radius justification
- Audience plan
- Awareness advertisement
- Message or lead advertisement
- Store-visit offer
- Form or chat questions
- Opening-hours schedule
- Call or message process
- Promotional-code tracking
- Budget
- Local performance report



49. Complete Module Assignment

Students should prepare three Meta campaign plans:

1. Instant-form lead generation
2. Website or e-commerce conversion campaign
3. Local-business campaign

Each plan should include:

- Business goal
- Target audience
- Campaign objective
- Conversion location
- Campaign structure
- Dataset or Pixel
- Conversion event
- Budget
- Placements
- Creative
- Advertisement copy
- Form or landing page
- Retargeting
- KPIs
- Lead or sales process
- Policy checklist
- Optimisation plan

Suggested Evaluation

Area	Weight
Business understanding	10%
Asset and account setup	10%
Tracking plan	15%
Campaign structure	10%
Audience strategy	10%
Creative and copy	15%
Lead form and follow-up	10%
Retargeting	5%
Metrics and reporting	10%
Policy and presentation	5%

50. Key Terms

Term	Meaning
Meta Ads Manager	System used to create and manage Meta campaigns
Business Portfolio	System for managing business assets and permissions
Campaign	Level where the advertising objective is selected
Ad set	Level controlling conversion, audience, budget and placements
Advertisement	Creative and message shown to users
Meta Pixel	Browser-based website event measurement tool
Dataset	Meta system grouping event data
Conversions API	Direct connection between business data and Meta
Event	Measured action such as Lead or Purchase
Custom Audience	Audience created from existing business interactions
Lookalike Audience	New audience similar to a source audience
Retargeting	Advertising to people who previously interacted
Instant form	Form opening inside Meta technologies
Website form	Lead form hosted on the advertiser's website
Conversion location	Place where the desired action occurs
Placement	Location where an advertisement appears
Advantage+ Audience	Automated audience-expansion and delivery system
Frequency	Average impressions per reached account
CPM	Cost per thousand impressions
CTR	Clicks divided by impressions
CPC	Cost per click
CPL	Cost per lead
CPQL	Cost per qualified lead
CPA	Cost per acquisition
ROAS	Revenue or conversion value divided by advertising cost
Catalogue	Structured product collection used for advertising
CRM	System used to store and manage leads and customers
Deduplication	Preventing browser and server copies of one event from counting twice

Final Learning Outcome

After completing this module, a beginner should be able to:

1. Create and secure Meta business assets.
2. Create an ad account with correct billing settings.
3. Connect Facebook and Instagram.
4. Install and test the Meta Pixel.
5. Understand and plan Conversions API implementation.
6. Create Instant Form, website, message and call lead campaigns.
7. Create e-commerce sales and retargeting campaigns.
8. Promote a local physical store.
9. Create Custom and Lookalike Audiences.
10. Measure raw leads, qualified leads, customers and revenue.
11. Optimise audiences, creatives, forms and budgets.
12. Prepare an evidence-based Meta Ads report.

The practical Meta advertising cycle is:

Set Up → Track → Create → Launch → Qualify → Measure → Optimise → Scale

A cheap lead is not automatically a good lead. Campaigns should be scaled only after verifying tracking, lead quality, sales outcomes and business profitability.



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