DATA DRIVEN
FACEBOOK ADS CHECKLIST
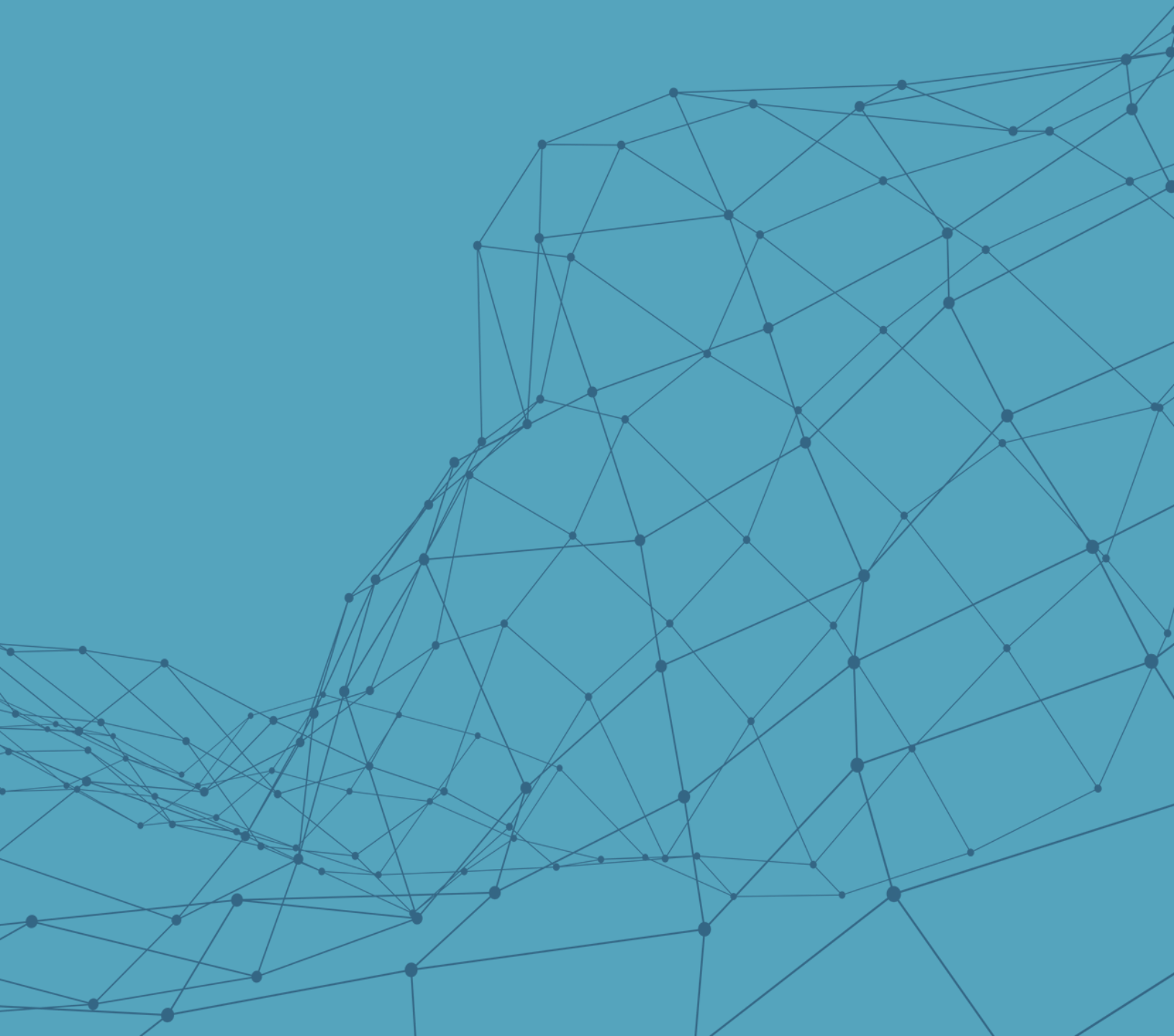
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Deliver better results from Facebook Ads campaigns with this step-by-step guide.

Here's the deal: Facebook makes it's easy to get your ads up and running in minutes.

What Facebook doesn't tell you is if you don't collect the right advertising data to guide your decisions, you could wind up spending a lot of money to receive UNPROFITABLE results.

I don't know about you, but I don't like losing money! I also want to know what's working and what isn't when spending my company's money on advertising.

That's why the team here at Data Driven has created this 46 point checklist to help you collect the right data for your business, and ensure your Facebook Ads are delivering the profitable results you expect.

The best part? You can use this checklist for *every Facebook Ads account* you manage.

Ready to get started? Let's begin with an easy one - fill out the name of the advertiser/business using this checklist

This Facebook Ads Checklist represents:
Advertising Account (or Business) Name

SECTION 1

DATA STRATEGY AND PLANNING

Launching a new ad campaign on Facebook can be exciting.

Do you know what's NOT exciting? Having Facebook drain your wallet like you're an unwitting whale at a high-stakes poker table, surrounded by sharks.

To hold both yourself and Facebook accountable, you need to plan out your advertising strategy and targets *before you ever spend* a single penny on your ad campaigns.

Identifying your advertising strategy will also allow you to set targets that match your goals.

This section of our checklist helps you document your Facebook Ads strategy and targets. The first step of getting your strategy and targets shared/adopted by your clients and/or your organization *is to write them down.*

1) Define your advertising objectives

There are three primary strategies for successful PPC advertising. Choose the one that best fits your advertising objectives.

- **Brand Awareness** - Maximize your reach and impressions
- **Budget maximization** - Drive the most results you can for a fixed budget
- **Profit maximization** - ROI focused, i.e. Once you dial in your ad campaigns, you will spend as much as you can on Facebook until your ads stop producing a profit

Advertising objectives:

☐ **2) Set your budget**

Make sure you know your daily, weekly, and monthly Ad Spend limits so you don't go over budget.

Campaign budgets:

PRO TIP *Are you trying to figure out how much you should spend on Facebook Ads? Use our profit-driven PPC advertising budget calculator. *This handy calculator will help you project a precise advertising budget using real-world data.*

🔗 **Get the Facebook Ads Budget Calculator**

☐ **3) Allocate budget per campaign**

Is your budget equally allocated between each of your ad campaigns? Or does one campaign require more Ad Spend than others? Write down your max budget for each of your campaigns.

Campaign name/ budget:

Campaign name/ budget:

Campaign name/ budget:

☐ **4) Know your targets**

To hold your advertising accountable and generate the results you expect, you need to set specific targets. Your targets should be defined by your campaign strategy.

Common advertising targets include percentage of Return on Ad Spend (ROAS) or reaching an acceptable Cost Per Conversion (CPC). Use specific numbers or percentages to clearly define your targeted results (i.e. 300% ROAS or $5.00 CPC)
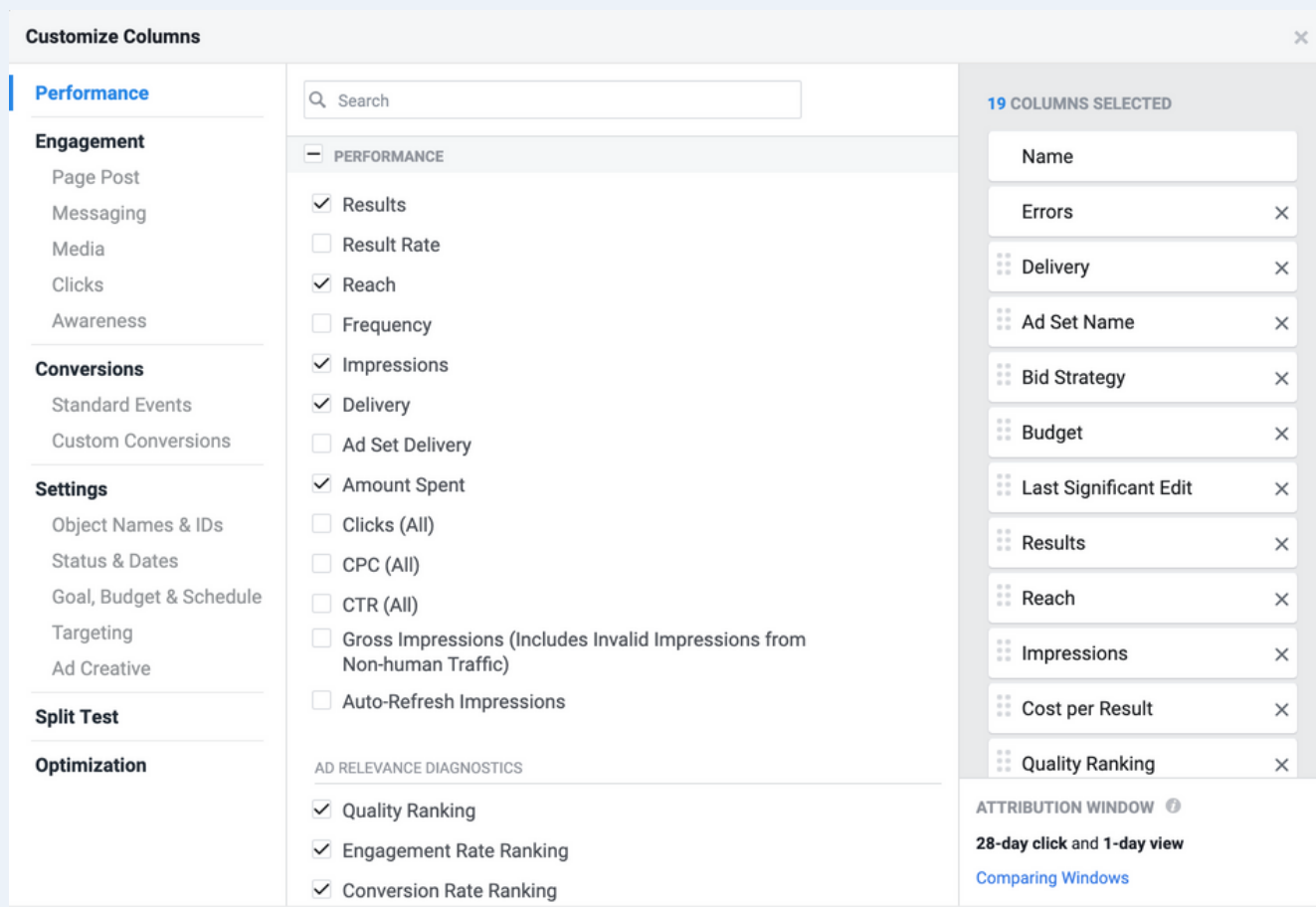
Results targets:

SECTION 2

PERFORMANCE METRICS WITHIN FACEBOOK

There are a ton of advertising metrics available to you inside the Facebook Ads Manager. Too many metrics if you ask me! Just looking at the options is overwhelming.

So, how do you know which metrics to watch like a hawk, and which metrics to block out so you don't get lured off track from your goals?

This section will help you set up Ads Manager to focus on the metrics that matter to your campaigns.

5) Customize columns to match your objectives

You can customize the metrics columns you see in Facebook to match your advertising objectives. For example, if your objective is to increase your ROI, make sure you add metrics like *total conversion events*, *value*, and *cost* to reporting columns.

If your objective is to increase brand awareness, then you want to see *engagement*, *impressions*, *reach*, and *frequency* in your reporting columns.

Add the following columns to my Facebook interface:

In addition to customizing your columns, make the following customizations to your Facebook Ads interface. These customizations will give you immediate insights into how your campaigns are performing:

☐ **6) Customize columns to see total quantity and value of the results your ads generate**

☐ **7) Add result rates for campaigns, ad sets, and ads**

For example: Add columns for Results, Result Rate, Cost Per Result, etc.

☐ **8) Make reach, frequency, and impression metrics clearly visible in your reports**

☐ **9) Make the cost per result metric clearly visible in your reports**

☐ **10) Check your quality ranking, engagement rate ranking, and conversion rate ranking routinely**

SECTION 3

ACCOUNT STRUCTURE

Think of your Facebook ads account like any system within your business. Process and organization are crucial to getting great results!

But let's face it; *the Facebook Ads Manager interface is not exactly easy to navigate.* That's why this section will help you structure and organize your account for success.

This section also helps you verify that your strategy from Section 1 is reflected inside your Facebook Ads account.

☐ **11) Use clear naming conventions that explain the purpose, strategy, and objective of campaigns**

For Example: Campaign Name = "Advertiser | Objective | Product/Service | Timeframe"

Data Driven Example: Campaign Name = "DDU | Conversions | FB Ads Checklist | 2020"

☐ **12) Set your campaign budgets inside Ads Manager to reflect your budgets from Section 1 of this guide**

☐ **13) Use ad set names to reflect your audience persona and/or targeting settings**

For Example: Ad Set Name = "Persona Name | Pixel Audience | Location | Language | Demographics | Bid Strategy/Objective | Key Dates"

Data Driven Example: Ad Set Name = "Business Bob | 1% Lookalikes | US CA | ENG | 24-64 | Max Conversions | March 2020"

☐ **14) Campaigns utilize multiple ad sets based on audience awareness states. This allows you to show relevant ads without exhausting individual audience segments.**

For Example:
 - Ad Set 1: Unaware
 - Ad Set 2; Problem Aware
 - Ad Set 3: Solution Aware
 - Ad Set 4: Product Aware
 - Ad Set 5: Fully Aware

☐ **15) Set ad schedules and utilize budgets that are aligned with audience definitions**
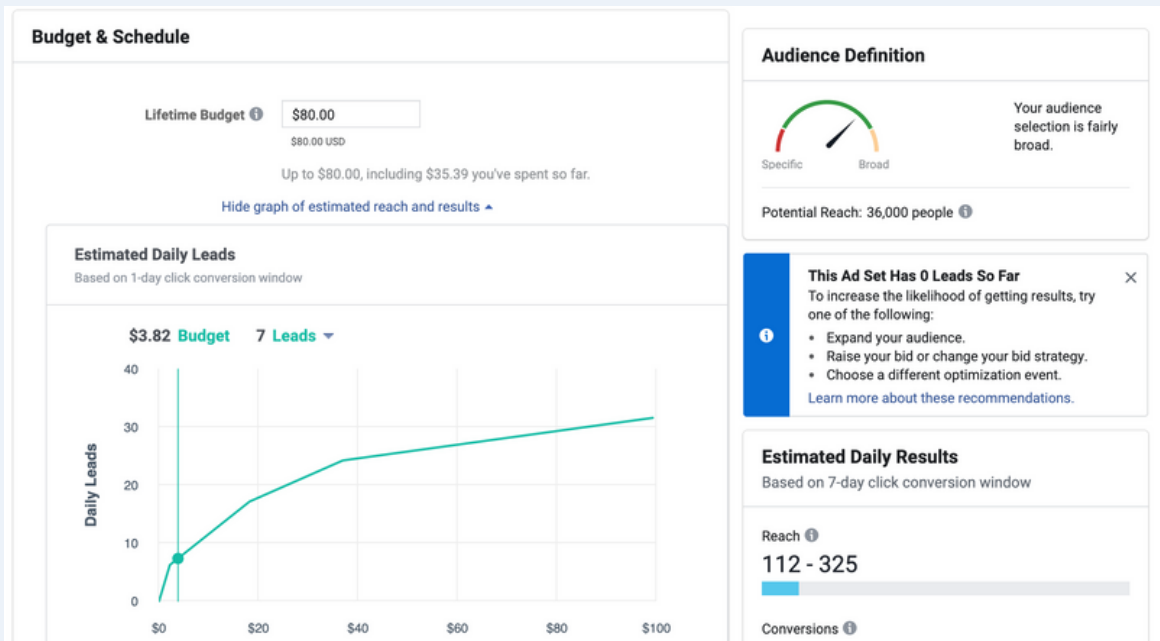
16) Test multiple ad creatives/formats to determine winners

17) Verify your ads link to properly working landing pages that provide clear value to the users who click-through

18) Define a conversion action for each ad and verify your ad is utilizing the Facebook Pixel for success tracking

19) Add URL Parameters to each individual ad so you can track campaign performance using Google Analytics

PRO TIP *There are four variables you need to set for EVERY AD to be tracked accurately in Google Analytics. We'll cover theses specific tracking instructions in section 7.*

ADS AND AD CREATIVES

Facebook makes it easy to test multiple ads against the same audience in an ad set so you can see which ad performs best. To maximize the value of Facebook's ad testing system, you will want to make sure you follow these data driven best practices.

☐ **20) Measure which ad creatives perform the best and share your winning ad creative across ad sets and campaigns**

☐ **21) Monitor and address ads that have negative comments or reactions on a routine basis**

☐ **22) Preview all your ads on Facebook and Instagram before they are finalized using the Ad Preview tool**

☐ **23) Use reports and ad charts to monitor performance**
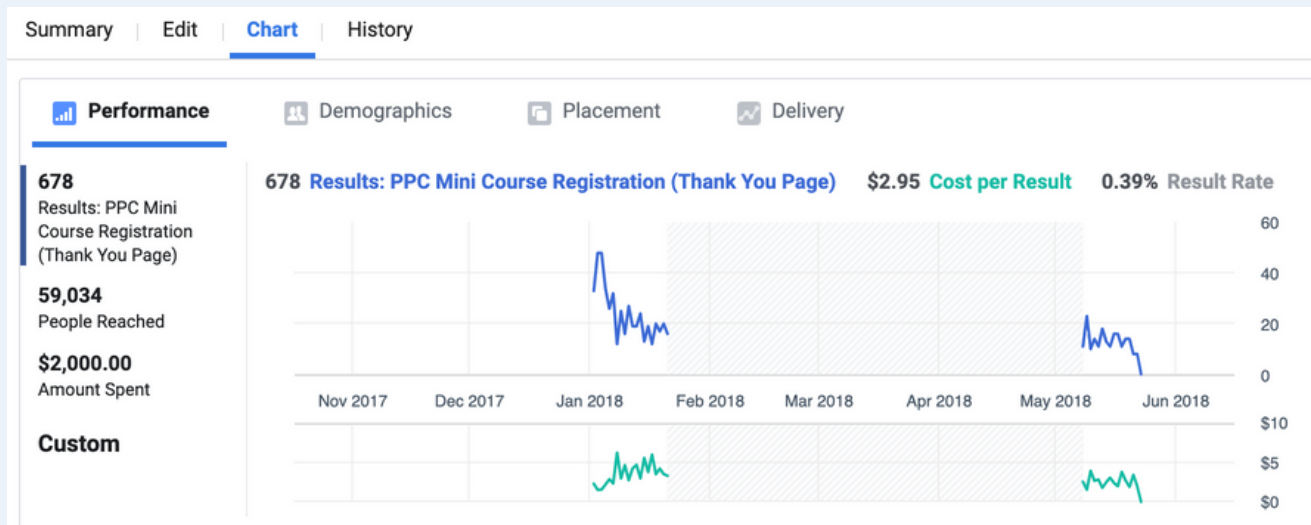
SECTION 5

AUDIENCES, PIXELS, AND AD SETS
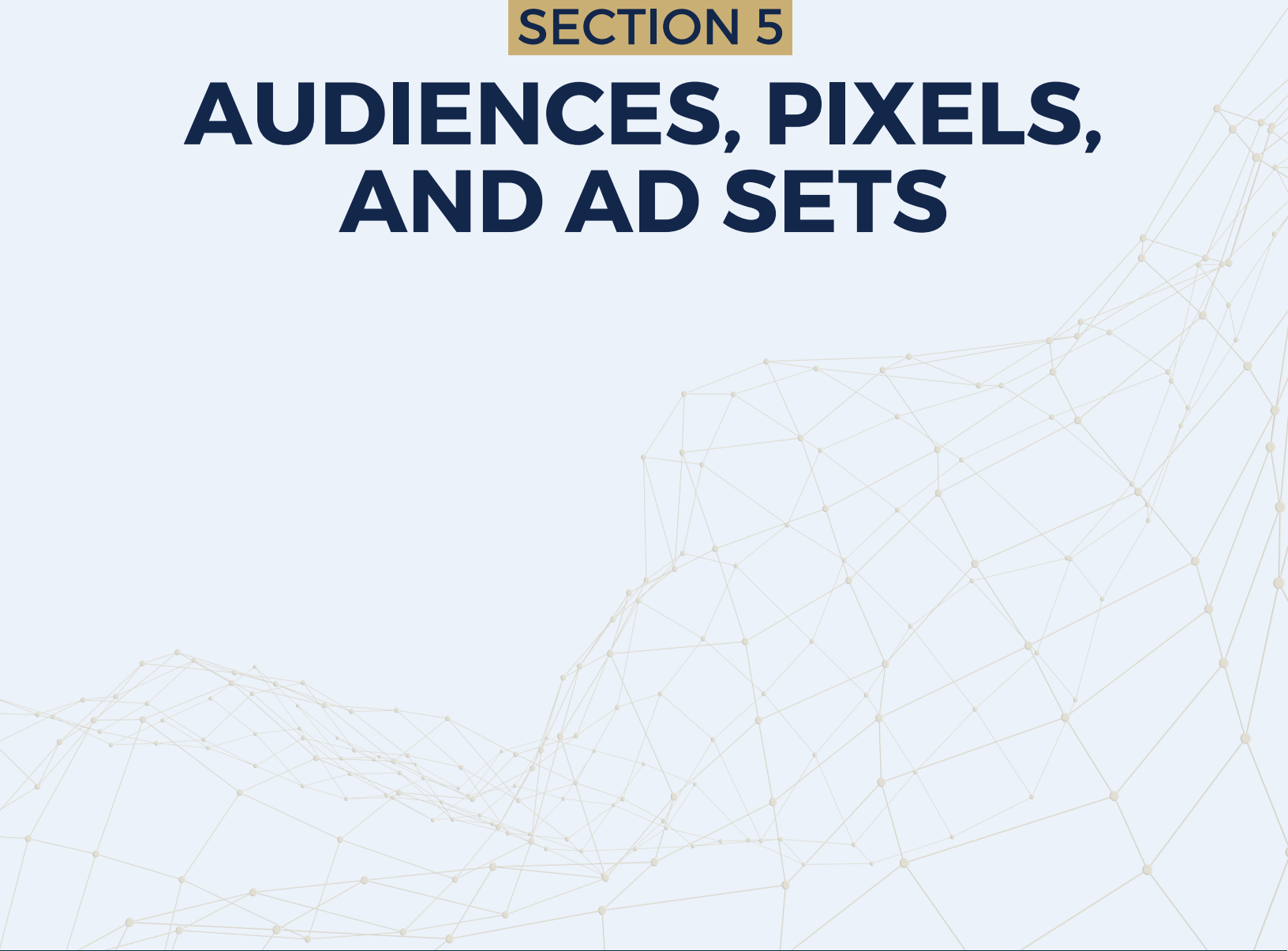
The key to getting great results from Facebook advertising is reaching the right audience. Facebook makes it easy to reach hundreds of unique audiences. All of these audiences will perform differently over time. That's why if you only define a single broad audience to target in Facebook, you'll burn through your budget faster than a sugar addict in a candy store, without collecting the granular data you need to optimize your targeting.

Don't be a dentist's dream patient! If you want to increase your ROI, scale results from your best ads, and limit your negative exposure from ads that perform poorly... you MUST create multiple audiences in your account!

Follow these steps to make sure you target the right audiences and scale your campaigns effectively.

- [ ] **24) Verify that the Facebook audience pixel has been placed on all websites and apps owned by this advertiser**

- [ ] **25) Data is actively being received by the Facebook pixel and the data closely matches your Google Analytics visitor numbers**

- [ ] **26) Utilize demographics in your target audiences that are similar to your (client's/organization's) best customers**

- [ ] **27) Design ad sets to engage your target audiences and use several ad sets for granular targeting around personas**

- [ ] **28) Ensure that each of your ad sets has a clear offer and value proposition for the audience you're targeting**

- [ ] **29) Define remarketing audiences using website visitors captured through the Facebook Pixel**

- [ ] **30) Define specific remarketing audiences based on user events and conversions**

PRO TIP *Build an audience that includes existing customers and a second audience for non-customers.*

While you're at it, build an audience of users that have taken "top of funnel" actions and a separate audience that that have taken "bottom of funnel" actions.

These specific remarketing audiences make it easy to reach the right people at the right time. The more clearly you define your audiences, the more relevant you can make your advertising, and the more conversions you'll generate!

☐ **31) Create lookalike audiences to reflect your best customers and key visitor segments**

For example: Build a 1% lookalike audience based on your existing customer segment and use this combined with demographics to build persona-based audiences!

CONVERSIONS

Conversions are the positive results that occur from your advertising. A conversion could be a sale, a lead that fills out a form or submits their email address, or even an interaction with a key piece of marketing content.

Conversion tracking is 100% necessary if you want to measure your results from advertising on Facebook.

But don't settle for the basic conversion information Facebook provides you. Make sure you're verifying your conversions so you can see the full and true value your Facebook campaigns are delivering.

☐ **32) Verify that your conversion pixel reflects the successful conversions for leads, sales, and/or awareness**

☐ **33) Check to ensure that all your active conversions are visibly collecting conversion data**

☐ **34) Use a naming convention for conversions that is clearly shows the objective, asset, and action of the conversion**

For example: Advertiser Name | Campaign ID/Name | Action Taken | Dates Run

Data Driven example: DDU | 13575 FB Ads Checklist | Downloaded | Year-Round

☐ **35) Upload your offline conversions into Facebook to match existing customers on a routine basis**

PRO TIP *Did you know that you can upload your offline conversion data into Facebook? You can use this data to improve your conversion tracking and targeting.*

Want to exclude your existing customers from a promotion? Offline Conversions can help you block your ads from displaying to your current customers. Want to market exclusively to existing customers? Offline Conversions can help you target them.

🔗 **Learn About Offline Conversions**

36) Integrate your Facebook Ads account with data sharing partners to measure conversions (when available)

You can use your Facebook pixel to connect to a variety of third-party platforms, including e-commerce platforms, content management systems, and customer relationship management databases. These integrations allow you to automatically share data between Facebook and your other platforms and use that data to create audiences based on visitor behavior.
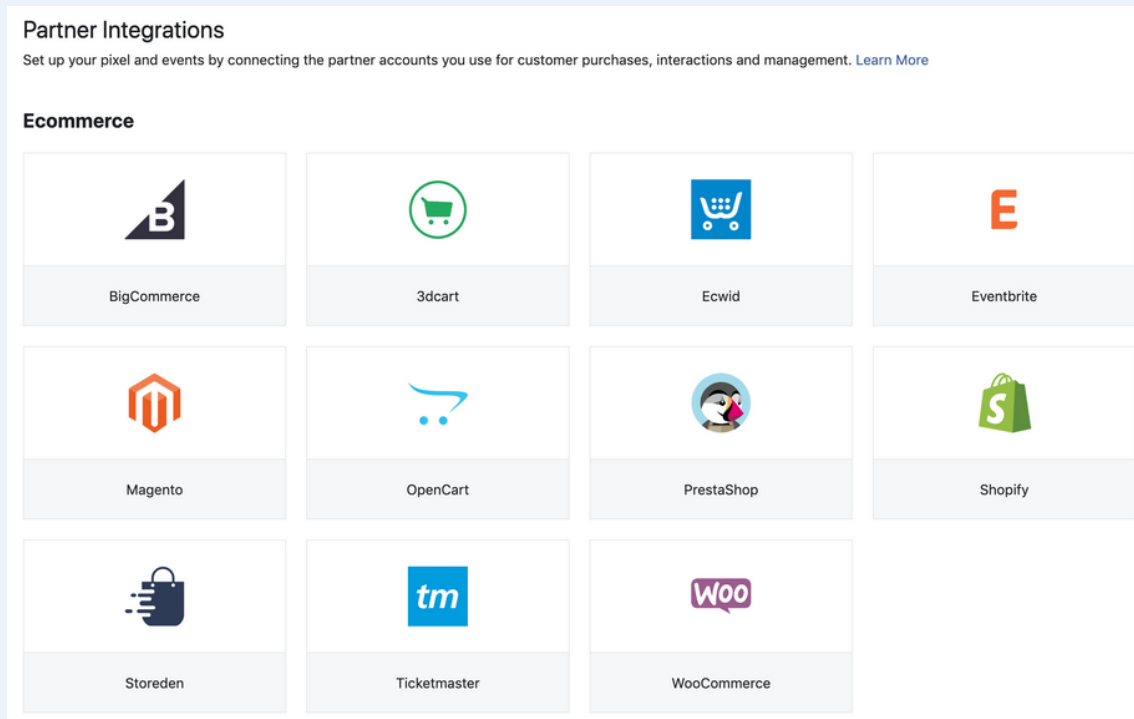
If you use software from one of the Facebook integration partners, there's a good chance linking these platforms to your Facebook Ads Manager will make your ad campaigns more effective.

🔗 **Go to Facebook integration partners**

SECTION 7

INTEGRATING WITH GOOGLE ANALYTICS

Believe it or not, the best tool for measuring the performance of your Facebook Ads is your website analytics tool. Since Google Analytics (GA) is free and formidable, this section shares tips about how to integrate Facebook with GA.

Follow these simple steps to ensure you're tracking Facebook Ads results in Google Analytics.

37) Add google analytics URL tracking (UTM) parameters to every ad in your account

38) Set utm_source for all ads to facebook with a lowercase f

39) Set utm_medium for all ads to cpc or paid_social (lowercase)

40) If you're using a medium other than CPC, set up a custom channel grouping to reflect Facebook Ads (This helps avoid the channel being listed as "other" in Google Analytics reports)

CHANNEL DEFINITIONS

1. Paid Social

Define rules

Medium ▾   contains ▾   cpc   — OR AND

AND

Source ▾   contains ▾   facebook   — OR AND

Display Color: **Preview:**

a a a a a a a a a a a a a
a a a a a a a a a a a a a

Paid Social

Done   Cancel

---

41) Set the utm_campaign for all ads to the name of the ad set

PRO TIP *You can use the value of {{adset.name}} to automatically send your ad set name into Google Analytics.*

42) Set the utm_content for all ads to the ad name

PRO TIP *You can use the value of {{ad.name}} to automatically send your ad set name into Google Analytics.*

43) Monitor your results in Google Analytics to make sure they closely match the numbers reported by Facebook
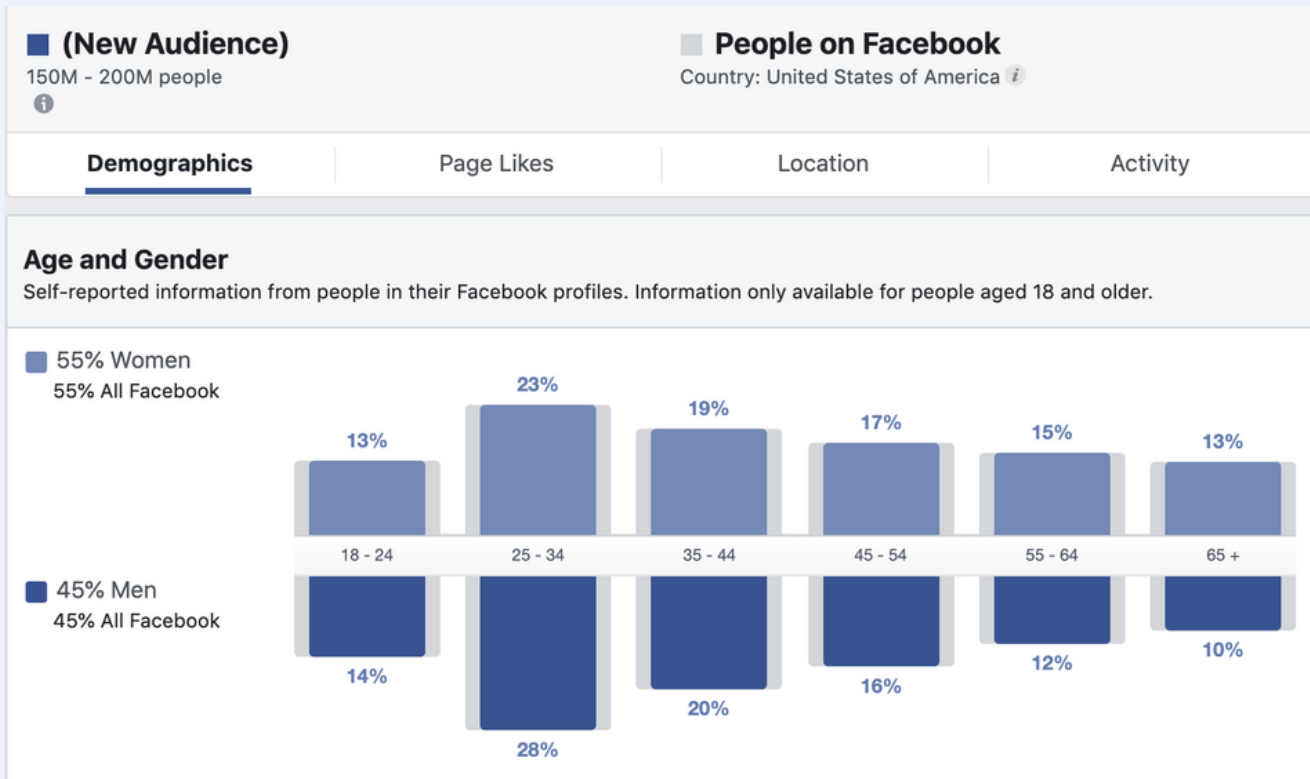
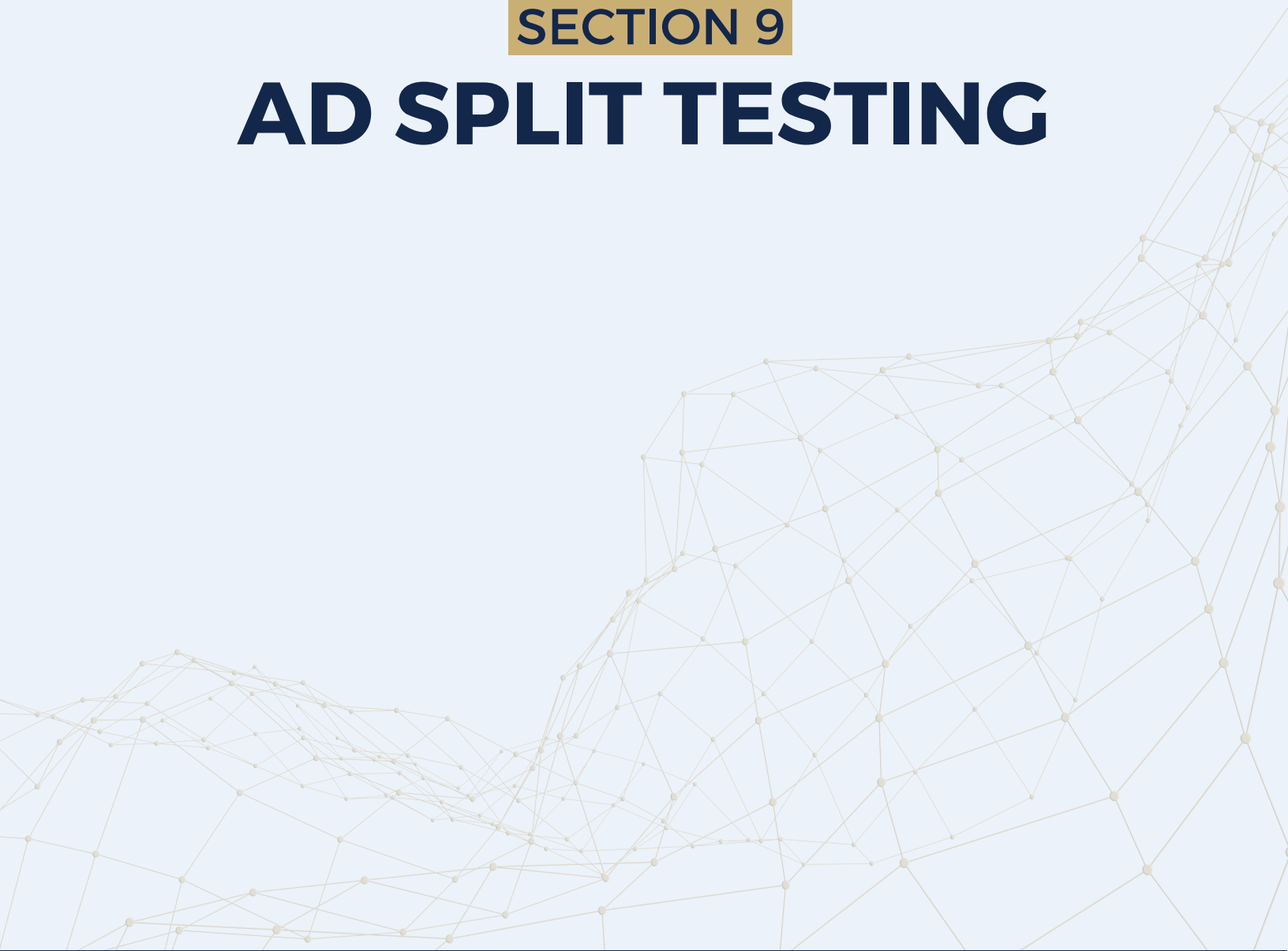SECTION 8

FACEBOOK AUDIENCE INSIGHTS

It's always a good idea to make sure your ads are reaching your intended audience. You can do this quickly and effectively with the Facebook Audience Insights tool.

44) Verify that the demographics from Audience Insights match the audiences you're targeting with your ads.

AD SPLIT TESTING

As mentioned in section 4, it's important to test multiple ads to see which perform best. This section is a reminder to set up ad tests and review them frequently!

☐ **45) Deactivate poor performing ads on routine basis**

☐ **46) Share the best ad creatives within your organization so they can be used across other marketing campaigns to improve your overall ROI**

ARE YOU A DATA DRIVEN ADVERTISER?

It should be obvious by now that data-driven advertisers outperform the average advertiser over the long term... because they are focused on results, not distractions.

So, after going through this checklist, I must ask: are you data-driven? How many of the steps on this checklist are you following?

Do you have any questions about how to improve your Facebook Ads ROI? Let us know by sending a note to support@datadrivenu.com and we'll answer your questions.

Also, be on the lookout for more great Data Driven content and resources designed to help you improve your Facebook Ads results.

Jeff Sauer
Founder of Data Driven

P.S. Ready to take your Facebook Ads skills to the next level? Check out Facebook Ads Mastery - the only online courses that shows you how to collect the data you need to advertise effectively on Facebook.

LEARN MORE ABOUT FACEBOOK ADS MASTERY