



The Ultimate Facebook Ads Checklist

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Introduction

“A journey of a thousand miles begins with one step.”

- Laozi

Don't know where to start when it comes to your Facebook Advertising campaigns?

Have no idea what you should do first, or even last?

This checklist will help!

We like to think of it as the ultimate checklist, which is why we've titled it "The Ultimate Facebook Ads Checklist."

It will tell you, step-by-step, what you need to do to create your first successful Facebook Ads campaign.

But don't let this list fool you.

Even if you tick all of the boxes, you'll never be able to sit back and relax. Your work will never be done.

Marketing is something that you need to constantly be working on. Improving your processes, learning about new developments and always creating new campaigns.

This is just the first checklist of many! But don't let that overwhelm you.

Just take it one step at a time. Slow and steady wins this race.

Setting Up

Before you can plan your Facebook Ads campaigns, it's a good idea to set up all the accounts you will need and integrate Facebook and Google Analytics with your website.

- 1. **Sign up to Facebook**, if you haven't already.
- 2. **Create a Facebook Business account.**
- 3. **Create an Ad Account** within your Facebook Business account.
- 4. **Setup your Facebook ad accounts by:**
 - A. Creating any users that you'd like to have access to your accounts, including setting their permissions levels.
 - B. Adding your billing information to your account so that you can pay for ads.
 - C. Setting up your notifications so you receive emails about important matters happening with your Facebook Ads account.

Setting Up

5. **Install the Facebook Pixel code on your website.**

Make sure that you install the Pixel code into the header of every page of your website. This allows Facebook to gather data about your website visitors that will be invaluable to you later on in your marketing campaign.

6. **Install Google Analytics on your website.**

- A. Sign up to Google, if you haven't already.
- B. Go to Google Analytics and create a new account for your company.
- C. Install the Google Analytics tracking code on your website, so it turns up on every page.
- D. Create two new Views on Google Analytics.
 - A User view, which you'll use for your analytics.
 - A Test view, where you'll test any filters before you use them in your user view.
- E. Create a filter for each view which does not count visits from your own IP address.

Setting Up

7. **Create a Mailing List.**

To collect contact details for potential customers and new customers.

- A. Sign up to an email marketing website (Aweber, Vertical Response, Constant Contact).
- B. Create a mailing list for your planned marketing campaign.

Setting Up Complete!

Planning

Before you create any ads, you first need to create a Facebook Ads strategy. This strategy will more or less be in line with your larger digital marketing strategy. It's best to work on these steps simultaneously as each step will help you navigate your overall path much faster.

1. **Write down your marketing goals** and a basic summary of what you want to achieve with your Facebook Ads campaigns. This will give you the basis for a Key Performance Indicator (or KPI) measurement plan.

2. **Create a KPI Measurement Plan.**

This will be a spreadsheet including your marketing goals and how you plan to measure the success of those goals. This should allow you to find a focus for your Facebook Ads campaigns. Include:

- A. Your business objective. Example: To help customers to market their business online.
- B. What strategies you are using to meet that objective. (Example: Educate customers).
- C. What goals you have set to meet those objectives. (Example: Create more engaging webpages).
- D. How you can measure your progress towards those goals. (Example: Website bounce rate).
- E. Whether your measurements need to be broken into segments. (Example: By demographic).
- F. What system you will use to track your measurements. (Example: Google Analytics).
- G. What you've achieved in terms of your measurements in the last three months.
- H. A target for what you'd like to achieve in the future.

Planning

- 3. **Create your Custom Audiences.** See the Audience Creation section.
- 4. **Create a Marketing Funnel Diagram.**

This will help you to visualize your customers and their journey from finding out about your business to buying your product.
- 5. **Sketch out a Campaign Diagram.**

By now you should have an idea of where your campaign will focus. With the diagram you want to show a customer's route from beginning to end through your sales funnel as a flow chart, including:

 - A. **Where the customer will begin. This will almost certainly be your Facebook Ad, but you may also use other starting points such as your Website or Email Marketing.**
 - B. **Stages your customer will travel through. Example: landing pages, marketing emails, sales lists.**
 - C. **Where the customer's journey will end. Most likely when they buy your product - but really their journey will never end as they can then be fed into other diagrams and campaigns later.**

Planning

- 6. **Update your KPI Measurement Plan.**
Using any information gleaned from your campaign diagram.

- 7. **Create a Content List** based on your campaign diagram.
This list will tell you what written and visual content needs to be created. This will allow you to figure out the amount needed, who it will be targeted to, and the subject matter of the content. Sort into categories as follows:
 - A. **Type of Media** (Example: Facebook Update, Marketing Email, Blog post etc).
 - B. **Title** (Example: "Today's Social Media Blog Post").
 - C. **Producer** (Who will create the media).
 - D. **Purpose** (What the goal is for the piece of media).
 - E. **Deadline** (When the content needs to be completed by).
 - F. **Publishing Date** (When the content needs to be published).
 - G. **1st Draft** (To keep track of when a 1st Draft has been completed).
 - H. **Final Draft** (To keep track of when a final draft has been completed).
 - I. **Proofread** (To mark when the final draft has been proofread).
 - J. **Published** (To mark when the final draft has been published).

Planning

- 8. **Create Style Guides** for every piece of media you will be formulating. This will ensure everybody in charge of content creation follows the same rules in order to create consistently branded materials.

Write guides for:

- A. Tweets
- B. Blog Posts
- C. Facebook Updates
- D. Facebook Ads
- E. Instagram Posts
- F. Emails
- G. Letters
- H. Website Layout
- I. Social Media Page Layouts

Planning Complete!

Audience Creation

Before you can run any ads, you must first pin-down your preferred target audiences and then transfer them into your Facebook Ad accounts. These custom audiences will be who will see your ads, broken down into different demographics.

- 1. **Survey your current customers** to find out about them. Ask them for information which will be useful for target audience creation. Choose from:
 - A. Job title
 - B. Age
 - C. Gender
 - D. Educational background
 - E. Marital status
 - F. Location
 - G. Ethnicity
 - H. Religion
 - I. Language
 - J. Salary
 - K. Why they're your customer and not your competitors.
 - L. What they think you're doing right.
 - M. What they think you're doing wrong.

Audience Creation

2. **Analyze current Customer Data.**

Collected through Google Analytics or other means. Learning about your current website visitors and customers and what demographics they fit into. Find out information as in number 1.

3. **Create 8 Buyer Profiles** from the data collected in numbers 1 and 2.

These will be profiles that detail the different demographics that buy your product or use your service, as though they were an actual person. List:

- A. Name
- B. Age
- C. Gender
- D. Job Title
- E. Income
- F. Location
- G. Education
- H. Family Life
- I. Tech Literacy
- J. Interests
- K. What they value
- L. What they fear
- M. Their goals
- N. How you can help them meet their goals
- O. Their challenges
- P. How you can help them to overcome their challenges
- Q. An example of a pitch to that persona

Audience Creation

4. **Add your Buyer Profiles to Facebook as Saved Audiences.**

Transfer over the applicable information. For example, if one persona is in the 20-30 year old demographic and is interested in video games, set those options up with your Saved Audience.

5. **Create Custom Audiences** on Facebook based on:

- A. **Your mailing list:** So you can target ads to people currently interested in your business.
- B. **Your customer list:** So you can target ads to current customers.
- C. **Your website traffic:** So you can send ads to people who've been to your website.
- D. **Engagement traffic:** So you can send ads to people who have engaged with your Facebook page.

Audience Creation

6. **Create Lookalike Audiences for your Custom Audiences.**

Lookalike Audiences are audiences of people that fit the same demographics as your Custom Audiences. For example, if you create a Custom Audience based on your mailing list, the Lookalike Audience will be an audience of people like those that are on your mailing list.

Audience Creation Complete!

Media Creation

Every Facebook Ads campaign will necessitate the creation of media, whether it's the ads themselves, photos to accompany the ads, landing pages that the ad will point to, or emails to accompany the marketing campaign. The easiest way we've found to organize this media is to create a content list so you know exactly what needs to be made, when, and what the purpose of the content is. That way you have something to refer to that will keep you on track!

- 1. **Create your Landing Pages.**
 - These are single use web pages which you may wish to direct people to once they click your ads.

- A. Write copy for Landing Pages.**
 - i. Draft 1
 - ii. Draft 2
 - iii. Final Draft
 - iv. Proofread

- B. Layout and publish your Landing Pages.**
 - Either with your website CRM or a landing page tool.

Media Creation

- 2. [Optional] **Write Blog Posts.**

Blogging is a great way to keep your visitors up-to-date with your business and bring organic traffic to your website. To do this you should:

 - A. Research and write a list of keywords as the basis of your blog posts. These are popular search terms that people are using to find businesses in your industry.
 - B. From your keywords, come up with a number of articles that you can write about on your blog.
 - C. Use the keywords both in the title of your blog post and within the content itself.
 - D. Keep the content concise and short.
 - E. Tailor the post to your reader in style. If you're selling a professional product, keep your writing professional.
 - F. Once the post is published, share it on your social media accounts.
 - G. Use an SEO Plug-in to your website to help you track your effectiveness.

Media Creation Complete!

Create Your Facebook Ads

It's finally time to make your ads! From doing your planning you should have a good idea in your mind of who your target audience is and where you want your focus to be on your ads campaign. Keep this in mind while you make your ads. Put yourself in your audiences shoes.

1. **Refer to your content list to see the subject for your ad.**

Each ad should contain:

- A. A call-to-action.
- B. An offer if possible to entice the viewer.
- C. An eye-catching photo.

2. **Write ad copy.**

- A. Draft 1.
- B. Draft 2.
- C. Final Draft.
- D. Proofread.

3. **Create photos or videos to accompany your ad.**

Create Your Facebook Ads

- 4. **Create your ad in your Facebook Ads account.**
 - A. Choose the type of ad you plan to run.
 - B. Choose the page your ad will link to (if applicable).
 - C. Choose the target audience for your ad.
 - D. Choose a daily and lifetime budget for your ad.
 - E. Choose when you want your ad to run.
 - F. Add your copy.
 - G. Insert your photo or video.
 - H. Place your ad order.

Facebook Ads Complete!

Analytics Setup

Once your campaign strategy has been planned and you have figured out how customers will be directed through your funnel, you will come to see what KPIs need to be tracked in order to measure the success of your campaigns. From there you need to create reports and dashboards that will give you quick access to the data. It's often best to set this up before you create a campaign to ensure the data will be collected for the entire campaign and that it's collected correctly.

- 1. **Ensure your KPI Measurement Sheet is up-to-date.**
So you have a list of metrics to be tracked.
- 2. **Setup Google Analytics Goals.**
These will be trackable metrics on your website which will correspond to objectives you've set for yourself.
- 3. **Create a Google Analytics dashboard.**
Which shows relevant data to you quickly. This will help you to easily check how your campaigns are doing.
 - A. Use a widget for each GA Goal created, to track your goals.
 - B. Use a widget for every other GA measurement from your KPI plan concerning your website.

Analytics Setup

- 4. **Create custom Facebook Ads columns** to track relevant metrics.
- 5. **Use a dashboard website to collect data from multiple sources.**
To show all your data on one screen for ease of use.
- 6. **Use a website to create automatic monthly reports.**
For your Facebook Ads account and website.

Analytics Setup Complete!

Testing

Once your ads, landing pages and associated media have been created for your Facebook Ads Campaign, your work isn't done. To make sure your campaigns are most effective, you must optimize them over time to bring your ads cost down, increase the leads you receive and to improve your user experience.

1. **View your analytics reports and dashboards regularly.**
Compare your metrics against your KPI plan. This will show you which areas are above and below your goals, so what areas are in need of improvement.
2. **Choose a metric that you need to improve.**
For example, maybe the number of email sign-ups.
3. **Draw a diagram of your customer's journey.**
From the moment they find out about you to the moment they hit your chosen metric. For example, the customer sees your ad, clicks on it, goes to your landing page, reads your landing page, then sign-ups to your email list.

Testing

- 4. **Figure out where people leave the path at each stage of the journey.**
Have 1,000 people gone to your landing page, but only 5 of them signed up to the email list? This will give you an indication of where in the process you can look to improve.

- 5. **Once you know what needs improving, test something different.**
The easiest changes to make are small ones. If you change too much at a time, you can't pinpoint what is causing the change. In the case of the example, try changing the copy of the landing page but nothing else. Did these improve your results? Then...keep testing!

Testing

6. **Test every process in your funnel, making improvements to:**

A. Landing pages

- i. Copy
- ii. Layouts
- iii. Buttons
- iv. Page elements
- v. Offers
- vi. Pop-ups

B. Ads

- i. Copy
- ii. Images
- iii. Offers

C. Website

- i. Layout
- ii. Pages
- iii. Pop-ups

D. Emails

- i. Titles
- ii. Copy
- iii. Call to Actions

7. **When you find out what works, repeat it.**
When you find out what doesn't work, avoid it!

Testing Complete!

Email Marketing

Collecting email addresses from potential customers and current customers is essential in digital marketing. This turns a person from a stranger that has seen your ad into a connection you can foster and continue to market to for free.

- 1. **Setup mailing lists using an email marketing website.**
(Mailchimp and Constant Contact are two of the most popular).
 - A. Create multiple lists which you can use for a variety of reasons. For example, you may want to have a list of current customers to send emails to so you can keep them loyal to your business or make them aware of new products. Alternatively, you may want to create lists based on the customer's demographic.
 - B. If needed, create "Welcome Emails" for your new subscribers, to automatically send when they sign up, just to let them know what you'll be sending them in future or just confirming their subscription.

Email Marketing

- 2. **Check anything that collects email addresses.**
 - To make sure they are connected up to the correct list.
 - A. Integrate your Landing Pages with your Email Marketing service.
 - B. Make sure the form collecting email data links to the correct mailing list. (Example: If you have a Landing Page that offers to send customers information about “new shoes”, make sure the form they fill in connects to your “Shoe Interests” mailing list).
 - C. Create “Thank You” pages to transfer customers to once they fill in your email form. These are small webpages simply thanking the customer for signing up. These can be used in your Google Analytics to track how many customers complete your email form and in Facebook Advertising to track conversions.

Email Marketing

- 3. **Create regular emails for your mailing list.**

Ensure each email has a specific goal in mind. Do you want to educate your customers? Sell something to them? What's the main point of the email? This will help to form the basis of the email. Each email should have:

 - A. A compelling title which will encourage the people on your list to open the email.
 - B. Valuable information for the reader. This will be tied to the goal of the email. If there is no valuable information, the email will waste the reader's time.
 - C. A call-to-action. Something you want the reader to do. Whether it's click a button or email you back. Again this will be tied to the goal of the email.

Email Marketing Complete!

Social Media

All good Facebook Ads campaigns are run in conjunction with social media marketing. As your ads drum up awareness of your company, more people will end up on your social media pages, meaning you need to update them regularly with relevant information to stay fresh.

- 1. **Create a weekly Social Media Plan** which tells you when you need to post on social media and what site:
 - A. Break down your posts into topics for ease of writing. For example, maybe you want to use a mixture of news items, announcements, quotes, or promos.
 - B. Make sure you don't post the same type of post within quick succession of each other. Example: Two quotes in a row.

- 2. **Create your Social Media Accounts** (Facebook, Twitter, Instagram)
 - A. Select relevant names that match if possible.
 - B. Create profile images that match your brand.
 - C. Create cover photos that show what your brand does and fit in with your branding.
 - D. Ensure any other customization options for your page match to your branding.
 - E. Check branding is uniform across all accounts.

Social Media

- 3. **Facebook**
 - A. Write 2 posts per day.
 - B. Write long forms (blog posts) three times per week.
 - C. Take photos or create designs to accompany your posts.
 - D. Keep up-to-date with your page daily by:
 - i. Replying to messages.
 - ii. Replying to comments.
 - iii. Checking your notifications

- 4. **Twitter**
 - A. Write 2 posts per day.
 - B. Take photos or create designs to accompany your posts.
 - C. Keep up-to-date with your page daily by:
 - i. Replying to messages.
 - ii. Replying to comments.
 - iii. Checking your notifications.
 - iv. Retweet posts that match your industry four times per day.

Social Media

- 5. **Instagram**
 - A. Create 2 photos per day to share.
 - B. Use hashtags to find relevant users:
 - i. Follow users relevant to your industry each day to build your followers.
 - ii. Engage with users, like and comment on their photos.

Social Media Complete!

Rinse and Repeat

If you've got this far, I've got one word for you:

Congratulations!

You've completed your first Facebook Ads campaign. Maybe even your first ever social media marketing campaign. I'm sure you've learnt a lot and come a long way.

But as we said at the start of the book:

Even if you complete this checklist, that doesn't mean you're done.

You've finished your first campaign, but there are more to come.

There is always more to learn, more to test. Always something to refine or optimize.

This last checkbox is one that I hope you'll never tick.

Everything is Complete...?