



HubSpot |  Meta

The Beginner's Guide to Facebook & Instagram Marketing



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Why Meta is the right partner for you

With more than 3.2 billion people using at least one Meta service every day, this multinational company is home to some of the world's largest social media platforms—ones filled with customers who are eager to interact with brands.¹ In fact, Facebook and Instagram generate more marketing ROI than any other channel.²

The reason? People want to hear from you on these platforms. Eight in ten surveyed customers follow a business on Facebook or Instagram, and 79% have purchased a product or service after watching Reels — short videos brands use to entertain and inspire customers on Meta technologies.³

And then there's the under 25 group. Among GenZers who grew up with smartphones, social media isn't just a place to connect with friends and family—it's a place to spend time connecting with brands they enjoy. According to Meta-commissioned research, Gen Zers are happy to see brands on Meta technologies. In fact, 60% of those surveyed follow a brand on social media.⁴

It's why Meta offers convenient ways for users to get in touch with brands both big and small from all over the world—and what makes them an ideal partner for you.

3.2B

people use at least one Meta technology every day

60%

Of GenZers follow a brand on social media

Not sure where to start? Keep reading for strategies, tips, and tools to make the most of every opportunity to market with Meta.

¹ [Second Quarter 2024 Results Conference Call](#). Meta, Q2 July 2024

² [The State of Marketing](#). HubSpot, 2024

³ Meta-commissioned research with GWI, 2023. Base: 6,758 heavy short-form video consumers (1,178 in Brazil, 1,110 in Germany, 1,178 in India, 557 in Japan, 515 in South Korea, 1,113 in UK, 1,107 in US) aged 16-64 who are at least weekly Reels users

⁴ [Five Gen Z Trends Shaping the Future of Brand Engagement](#)

Introduction to lead ads

Plenty of people want to hear from you. But how can you find the right leads for your business? This is where lead ads come in.

Lead ads across Meta technologies can help you create meaningful first contact between people and companies while collecting accurate data on your audience in a way that protects their privacy and adds value to your business. People can simply tap your ad and a form pops up, allowing them to send up-to-date contact information and receive updates from your business—quickly and conveniently, wherever they are. They get the information they want, and you generate a qualified lead for your business.



Tips for building successful lead ads

There are many ways you can build lead ad forms that are simple for potential customers to fill out and submit. The key to creating a successful lead ads campaign is ensuring that the process of filling out and submitting the form is easy and intuitive.

Here are a few tips that can help you gain more actionable data through lead ads:

Make the most of mobile

Take advantage of lead ads' mobile-friendly function. This will allow potential clients to send up-to-date and actionable contact information directly to you when they're on-the-go.

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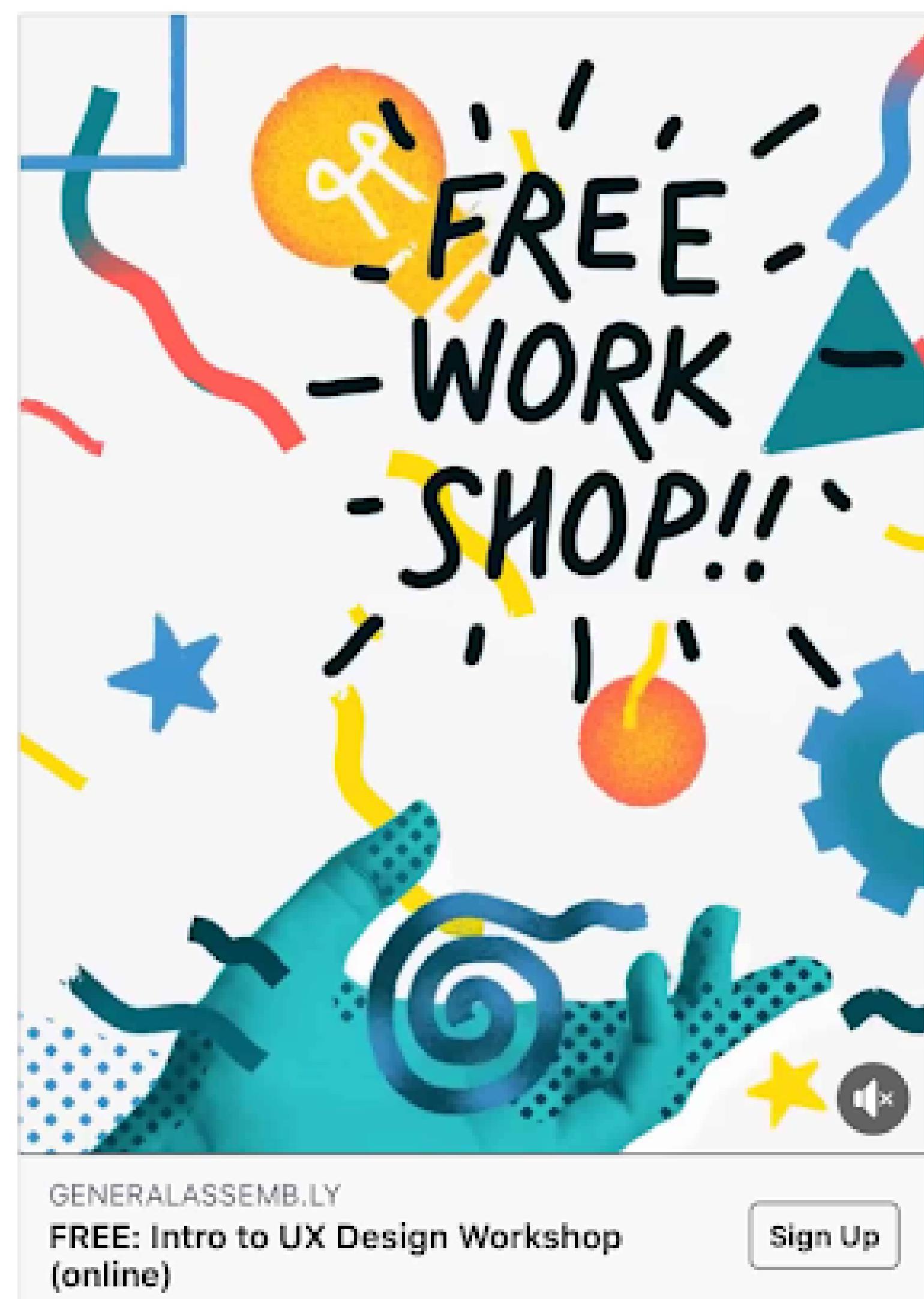
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Reduce drop-off with pre-population

Enable your lead ads form for pre-population. Potential clients are more likely to submit forms that are pre-filled with information they have already shared with Facebook and Instagram.

Sharpen your intent strategy

Reinforce user intent by including a review screen so that your audience can glance over the information they're submitting before they do so.

Keep it simple

Simplicity is key. When you create your lead ads form, make sure that it's not only easy for your prospective customers to navigate, but that it matches your ad, as well. You'll want to avoid overwhelming your audience with too many questions. When it comes to forms, less is more. People are more likely to submit their data when there are fewer fields to fill out. In one analysis, advertisers who asked three or fewer questions had a 26% lower cost per lead than those who asked more than three.⁵

Highlight a benefit

Use a text overlay to highlight a key benefit over your visual. You can also choose to animate your text to make it stand out.

⁵ Based on a propensity score matching analysis of ~700,000 instant forms run between Jan 18 2023-Mar 15 2023 for small business professional services advertisers in North America.



Connecting your Meta ads account to HubSpot

Sync leads, engage new audiences and more—right within HubSpot

When you manage your Meta ads campaigns in HubSpot, targeting your customers with highly relevant ads and reporting on the true ROI of your campaigns is simple. Start by quickly connecting your account, and decide whether or not you want to turn on ad tracking and lead syncing, and apply your tracking pixel. From there, leverage the HubSpot CRM to:

Create lead ads

Easily create lead ads across Facebook within HubSpot's familiar interface. Select your ad creative, audience, and budget, and automate follow-up steps to ensure your ad's success.

Automatically sync leads

As people fill out your lead ads across Meta technologies, they'll automatically be brought into your HubSpot Smart CRM database. Never worry about exporting your leads from Facebook or Instagram again.

Create highly targeted audiences

Connect your pixel to HubSpot and start creating audiences based on the granular interactions customers have with your website. Use nearly any CRM data point to create specific audiences and create targeted messages that help increase engagement.

Sync ad conversion events

To help get your ads in front of the right people, use your HubSpot integration to leverage Meta Conversions API. This powerful tool sends conversion data from your HubSpot CRM to Meta to teach Facebook and Instagram which customers are most valuable to your business.

Feature Spotlight

Reach the right leads with the Conversions API

The more Meta knows about your existing customers, the better it gets at targeting new prospects. But once someone clicks on your lead ad, there's no way to see what happens next. Did they visit a pricing page? Schedule a call? Make a purchase? Without those details, future Meta ads won't be as targeted as they could be.

This is exactly what the Conversions API is for—to automatically share your CRM data and help Meta understand which contacts are most valuable to your business. Meta can then use this information to show your ad campaigns to the right people.

Using the Conversions API to connect your HubSpot Smart CRM data with Meta technologies helps improve lead quality and reduce costs. Advertisers who use the conversion leads performance goal and CRM integration with the Conversions API experience an average:

15%

reduction in cost per
quality lead

44%

increase in rate of converting a
lead to a quality lead⁶

Compared to lead ads with instant forms optimized for volume of leads

⁶ Meta A/B test, January 2024 (Results based on A/B tests on 273 advertisers, with ads delivered globally from January 11th to 28th, and included incentives. Performance may vary)

Real success stories from real brands

Wondering what you can achieve with HubSpot and Meta? Here are just a few companies that have seen improvements after running lead ads across Meta technologies through their HubSpot Smart CRM.

The Fives Hotels and Residences drives sales with HubSpot and Meta

The Fives is a five-star luxury resort that implemented a partner solution using lead ads with HubSpot. They scaled up their lead flow, improving responsiveness and conversion rates. They transformed their business from 90% indirect sales channels to 90% direct sales over one year. As a result, they were able to increase their call center headcount by 40x to handle the increased lead count.



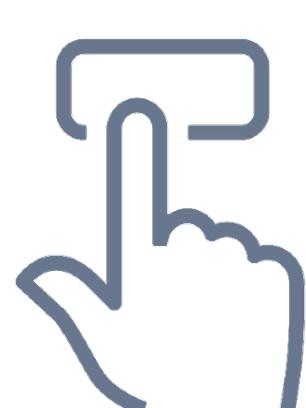
Airstream generates more leads at scale with HubSpot and Meta

Airstream is a creator of travel trailers and touring coaches that needed a simple way to generate more leads at scale and distribute them amongst their network of dealers. By utilizing a journey-based lead ads campaign, they were able to generate 78% more leads to scale and decrease their cost per lead by 44%, aligning their ad strategy with their business goals.



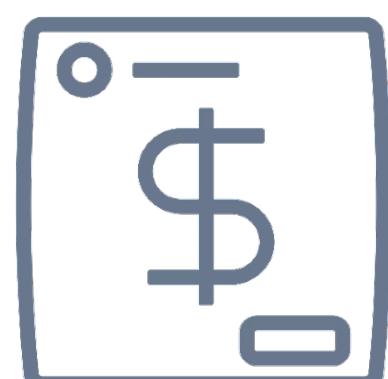
Starting a campaign: What you need to know

Ensure that your lead ads campaign gets off to a good start by keeping the following in mind during the development phase:



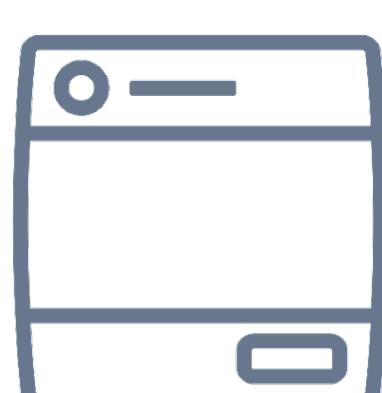
Include an engaging image or video and relevant call to action

Make your ad as engaging as possible and clearly communicate why people should fill out your form.



Determine the right budget

Use ad scheduling in the Advantage+ campaign budget to appropriately scale campaigns.



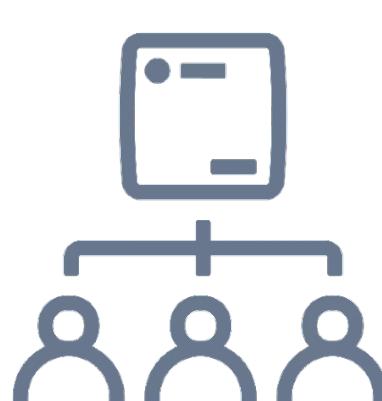
Run your ad on Facebook and Instagram

Extend the reach of your campaign by using Advantage+ placements to deliver ads on Facebook and Instagram.



Reach people who look like your best customers

Use a lookalike audience to reach people with characteristics similar to your current customers.



Reach people who previously engaged with your lead ad

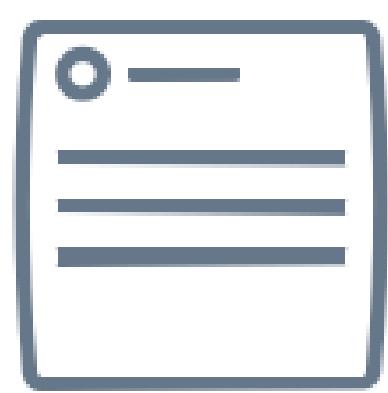
Create an engagement custom audience to reach people who started your form but never finished it.



Use dynamic ads for lead generation

Craft the creative and messaging of your lead ads based on what people have previously expressed interest in. By retargeting those customers and sending them directly to a lead form, you have the opportunity to collect higher-quality leads.

With these important elements in mind, you're ready to set up your lead ads across Meta technologies. For further optimization, focus on how you will set up your lead ads form.



Use the intro section

We recommend not skipping the intro. If your audience has clicked through to your form, they want to know more about your company and products. So, include information about your business and what people can expect when they submit your form.



Use multiple-choice questions

Asking multiple-choice questions can help you better understand or qualify your leads.



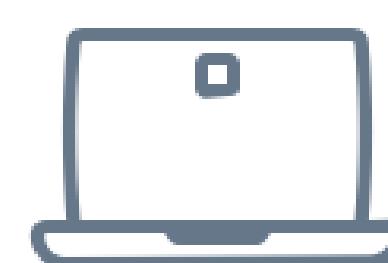
Limit short answer questions

Requiring people to type in multiple pieces of information may prevent them from submitting the form. Plus, short-form answers have a ton of variety which means you'll have to spend more time combing through them and attempting to sort them into data points that make sense for your business.



Add custom questions

Tailor your questions in lead ads so you can uncover their preferences, and ensure you're reaching out to the right people with the right information.



Use the completion screen

Customize the screen after form submission to encourage people to take another action, either to gather more information for future marketing campaigns, share your company or products on social media, or guide them into a sales pipeline.



Implement the store locator

Once a potential customer completes a form to find out more, show them where the closest physical location (if applicable) is, along with any relevant contact information such as a phone number, address, or email address.



Add a click-to-call option

Once someone completes a form, allow them to call your business right away to start a conversation.



Test various instant form lengths

Ensure that your form is meeting your business goals by running an A/B test where you measure completion rates, cost per lead, and cost per conversion against the length of the form.



Why CRM-powered advertising?

Customer data isn't just for sales teams—you can use it to power your advertising campaigns, too. CRM-powered advertising makes it easy to segment audiences, tailor messaging, and personalize your offers. And when you partner with HubSpot, we'll help you leverage your Smart CRM data to create more relevant, engaging ads across Meta technologies.

Personalize your Meta ads with HubSpot

Personalizing your marketing strategy for each audience can encourage engagement across your company's touchpoints online. Whether you want to create email blasts or ads that lead to landing pages, customizing them can have a big impact on your KPI. When you streamline your campaigns across Meta technologies through HubSpot, you'll be able to create custom ads and targeted ad campaigns, emails, webpages, and landing pages with any **default contact property** or **custom contact property**.

When you're ready to personalize ad campaigns, you can use the Meta Ads Manager to implement custom filters to target your preferred audience and create and adjust dynamic ads to meet the preferences of past and potential customers. Here are several strategies to get you started.

Optimizing your sales funnel

Sales funnel optimization is used to reduce drop-off rates and encourage conversions by getting rid of or improving low-performing pages, ads, and strategies. The big question is, how do you know where to begin? Focusing on reporting, attribution, and audience quality is a way to gain some great insights into the current strengths and weaknesses of your sales funnel.

Reaching higher-quality leads

With this strategy, you use the Conversions API to sync your HubSpot Smart CRM data to Facebook and Instagram. This helps Meta understand which leads are most valuable to your business. Meta can then use this information to show your ad campaigns to similar people, significantly increasing the likelihood they'll buy, subscribe, or sign up. It's a great way to help get your message in front of the right people at the right moment—all while lowering your costs and protecting people's privacy. [Learn how to get started with the Conversions API here.](#)

Audience segmentation

This marketing strategy is based on identifying subgroups within your established audience and tailoring messaging to encourage interactions and stronger connections. Subgroups can be based on:

- Age
- Ethnicity
- Gender identity
- Geographical location
- Income
- Level of formal education

Organizing your audience segmentation into niche subgroups will allow you to craft campaigns with collateral tailored to each different identified subgroup.





Custom audience targeting

A **custom audience** is an ad targeting option that lets you find those who may already be customers or have an interest in your product on Facebook or Instagram. You can pull from several options to create up to 500 custom audiences per ad account, including:

Website custom audiences: This targeting option matches people who visit your website with people on Facebook and Instagram, using the Meta pixel.

App activity custom audience: Creating an app activity custom audience is a great way to target ads toward specific groups of people who are most likely to take preferred actions on your app.

Customer list custom audience: This particular targeting option requires you to create your customer list in advance. To make a custom audience from a customer list, you should provide us with information (such as email, phone number, address) you have on file about your existing customers which we will match with information on Facebook profiles. We will use the information on a customer list to help you find the audiences you want your ads to reach. To get the best match rates, use as many identifiers as possible while following our **formatting guidelines**.

Engagement custom audience: An engagement custom audience is a custom audience made up of people who have engaged with your content across Meta technologies.



Lookalike audiences

A lookalike audience is an ad targeting option that can enable your ads to reach new people who are likely to be interested in your business because they share characteristics similar to your existing customers. It uses an existing **custom audience** you select for its source audience.

To create a lookalike audience, Meta's system leverages information such as demographics, interests, and behaviors from your source audience to find new people who share similar qualities. You can adjust the percent range to choose how closely you want your new audience to match your source audience.

We generally recommend a source audience that has between 1,000-5,000 people. However, the quality of your audience also matters. For example, you may get better results depending on your goals if you create an audience using the same demographics as your best customers, rather than one that includes all of your customers.

[For more information on lookalike audiences, check out this article.](#)



Ad sequencing

Sending a series of timed marketing messaging—whether it be emails or ads—to specific audience segments sounds great. But this strategy comes with its own problems. Marketers share a common, valid concern that their ads are too frequent and interruptive and will discourage their audience from doing business with them in the future.

HubSpot's remedy? Journey-based advertising.

Journey-based advertising (JBA) is a fantastic combination of paid advertising and the **Inbound methodology** - a blend of ad type and strategy to help make campaigns more engaging and lower your cost-per-click. JBA allows you to tailor your ad targeting and ad creation to align with the buyer's journey. By meeting prospects in the right place at the right time, JBA turns paid ads from a disruption into a helping hand.

Journey-based advertising is powerful because it fits your advertising strategy into the buyer's journey. It allows you to map awareness, consideration, and decision phases of paid advertising offers and ad copy—as well as the structure and strategy of your paid advertising campaigns.

Buyers' journey stages are also the basis for an ad account structure. You can create campaigns for each stage and choose ad formats, bids, and more based on how much your buyer persona knows about their problem, the possible solutions, and your organization.

For this reason, HubSpot has partnered with Meta to offer you Facebook ad sequences. You can design, target, and deliver a series of three ads to help you attract, convert and close new contacts. This partnership enables you to customize each ad's copy, audience, and scheduling options to ensure you deliver the ad most relevant to your audience's lifecycle stage. **Check out this step-by-step guide to discover how you can create an ad sequence.**

Reporting and Attribution

Reporting and attribution are great indicators of the overall health of your lead and sales funnels. It's always a good idea to do a deep dive every so often to ensure that everything is working as it should.

Reviewing website metrics will give you an eagle's eye view of your sales funnel. You'll be able to see how long your audience stays on a page before dropping off, or going to another page, allowing you to track user journeys through your website. Effective customer journeys result in conversions.

Reporting will also show you how much web traffic you are getting in general. A good metric to be aware of is your visit-to-contact rate. If this metric falls below 2%, it's an indication that something is wrong and warrants further investigation. A low visit-to-contact rate simply means that your site is getting a large amount of traffic, but few of your visitors are converting—indicating an issue with your lead funnel or the quality of your leads.

Having high-quality leads is essential. Because high-quality leads are always more likely to convert than low-quality ones, they are immensely better for your marketing budget. When your marketing approach and web pages are non-specific and indiscriminately target a large audience, your leads will err on the side of low quality and you will be spending more of your budget on dud leads.





Pinpointing your intended audience with market research, seeking out lookalike audiences, and appealing to them with a personalized ad strategy and website are fantastic ways to develop that essential high-quality lead funnel. Once you've done this, consider implementing lead scoring. Lead scoring is a system that assigns point values to the actions leads take when they interact with your company's website, marketing campaigns, and other pieces of content. When you're able to score your leads, you'll be able to fine-tune your marketing approach further with audience-based data you can use for your next marketing campaign.

Attribution rates will allow you to determine which channels are generating the most leads. Because marketers are responsible for managing more channels than ever before, attribution monitoring is a complex but necessary practice to see how certain pieces of content or marketing collateral directly impact their company's bottom line.

HubSpot allows you to pull attribution reports that include pre-built models to help you answer which elements of your strategy are performing better than others. For multi-touch attribution, HubSpot offers two different types of reporting: contact create and revenue attribution reports.

Contact create attribution reports measure the journey of contacts in your CRM up to the moment they were created, whereas revenue attribution reports measure the journey up to the moment they became customers. For even more information about **attribution reporting, check out this article.**

Connecting your Meta account to HubSpot

Manage your social calendar and report on your Facebook success

It's not just your ads that benefit from connecting HubSpot and Meta. When you manage your campaigns across Meta technologies within HubSpot, you get deep insight into how your company is performing and how your audience is engaging with your content. Quickly publish Facebook posts in HubSpot and repurpose your content across several networks. You can also upload your posts in bulk, or schedule them in advance. Use the social calendar to understand how much content you're creating within a given time, and quickly change your publishing plans to increase engagement.

Finally, HubSpot's social reporting tool lets you report on your success on Facebook and compare it to other social platforms regardless of where you originally made your post. Publish directly to HubSpot, or directly within Facebook. No matter where you publish, your performance will be logged in HubSpot so you can see how you're performing, and take action to improve your engagement. Once connected, you can:

Manage your Facebook and Instagram presence within HubSpot

Quickly create content for your Facebook and Instagram followers. Create multiple posts at a time and schedule them to go out immediately, or at a later date. You can also bulk upload your posts. If you use HubSpot's blogging tool, you can automatically share that blog on Facebook when it publishes.



See how Facebook and Instagram fit into your social calendar



Depending on your audience, you can post multiple times a day, or only a few times a week. Using HubSpot's social calendar, you can easily see how often you're publishing to Facebook or Instagram compared to other networks, and easily drag and drop scheduled posts to other days to increase engagement.

Publish anywhere, report in HubSpot

See how your content is performing - whether you publish through HubSpot or directly on Facebook or Instagram. Track metrics like impressions, new contacts generated from social, and top posts, and compare your performance on Facebook to any network you are active on.





Ready to reach prospects and customers in more meaningful ways across Meta technologies? Simply connect your accounts to start creating high-performance campaigns driven by CRM-powered data.

GET STARTED

* Terms & Conditions Apply