

# Why You Need a Facebook Ads Audit (+ How To Do It in 6 Steps)

If you're like most marketers and advertisers, you closely track the performance of your Facebook Ad campaigns on a daily or weekly basis. That's where a Facebook Ads audit template comes into play.



Facebook Ads audits are essential to assess the overall performance of your campaigns. In this post, we're going to go over exactly what's included in a Facebook Ads audit, how to perform one, and share a free Facebook Ads audit template to make the process easier.

## What is a Facebook Ads Audit?

A Facebook Ads audit is a full and in-depth review of everything that's happening with your Facebook Ad campaigns.

You can conduct audits weekly, but it's essential to ensure that you're auditing your accounts under the following circumstances:

- At frequent intervals, such as once a month to ensure everything is on track
- Whenever you're taking on a new client's ad management
- If there's an issue with underperformance in existing campaigns and you want to know why
- When you're interested in making changes to your campaigns overall to optimize them further, or after testing out a new strategy

Auditing will examine all of the metrics involved with your ad campaigns, including what results you're getting and how much they're costing you. In-depth audits (which we strongly recommend conducting) also will look at the strategies you're using, the audiences you're targeting, and the ad tools that you're using. Without thorough audits, it can be difficult to truly assess how your campaigns are performing and what's driving the results. Audits can help you spot trends and patterns, making it easier to create stronger campaigns both in the short and long-term future.

Audits are also essential in making sure that your accounts are in good standing in every way; since Facebook updates the platform regularly, they prevent you from missing a major change like how the pixel works or new ad types.

## How to Perform a Facebook Ads Audit

When performing a Facebook Ads audit, there are multiple steps involved and a lot of data that you'll be looking at. Because of this, we recommend going step by step through the process and compiling data in a central point to better track trends. We're going to look at the six essential steps that come into play when conducting a Facebook Ads audit. They may not all apply to you, but read through each one to make sure. Then you can follow the steps that apply to you and skip the ones that don't.

### 1. Gain High-Level Access to the Account in Question

The first thing you need to do, if possible, is to get access to the Facebook Ad account that needs to be audited.

Some agencies will ask clients to just send over the analytics reports, but it's much more effective to gain access to the analytics directly.

This is for several reasons:

- Sometimes you may want them to add more data than standard reports have, like frequency or CTR metrics (which you can add to the dashboard but aren't there by default)
- You can view more information about the campaigns instead of relying on only the information static reports provide, which can help you complete a more thorough audit
- You can see how performance changed over time.

At this stage, you can ask the client to give you access through the Business Manager if they haven't already. You can copy a number provided by Facebook and give it to the client for them to grant you access. You can send them these instructions, and make sure they give you access to analytics.

At this stage, we recommend checking who has access to any accounts that your business has access to. Sometimes we have team members who leave, for example, who need to be removed; this is a good step to take, as you can review who has access to which accounts and at what level under the "People" tab of Business Manager.

## 2. Review & Download the Metrics

As soon as you have account access, it's time to start looking at the metrics.

Head to the Facebook Ads manager or a third-party tool like AdEspresso (which can offer more detailed information about ad performance), and start combing through the data.

Request Access to Ad Account

×

Type Your Ad Account ID

Ad account ID

or

Follow these steps to request access to an ad account:

1. Contact the owner of the ad account.

2. Ask them to go to the Ad Account tab in their Business Manager and click Assign Partner.

3. To give you access, they'll need to enter the number below and choose a role.

Ana Gotter LLC

Copy Text to Clipboard

If you're given access to an ad account, you agree, on behalf of Ana Gotter LLC as its authorized representative, to [Facebook's Terms](#).

Your name, email, business name and primary country location will be disclosed to people who manage the ad account.

Cancel

Confirm

In the Ads Manager, you can view the data available on your current campaigns, and you have the option to add additional fields of metrics to the dashboard. You can also click on “Reports” and then “Create custom report” for more. To avoid sharing confidential client information, I’m using my mock ad account, so ignore the non-existent data.

Here, you can view reports at the campaign, ad set, and ad level. Depending on how deep you want to go, you can either start with the campaign level or go all the way down to the ad level.

Filter by name or ID or Email
Add

Ana McNaughton

haley@haleywalden.com  
Pending

Ana McNaughton

Admin access · ana.gotter@gmail.com
Edit

Add Assets

Assigned Assets

Add Assets

Here are the assets Ana McNaughton can access. View and manage their permissions. Add or remove assets.

Search by ID or name

Pages

AGL

Catalogs

Food

If you want to understand elements like creative strategies, messaging, visuals, and offers that correspond with an audience, you'll want to look at things at the ad level, so download those reports. You can download the report in a CSV or excel file.

Campaigns			Ad Sets			Ads			
+ Create	Duplicate	Edit	A/B Test	Preview	Rules	View Setup	Columns: Performance	Breakdown	Reports
	Ad Name	Delivery	Ad Set Name	Bid Strategy	Budget	Last Significant Edit	Attribution Setting	Results	Reach
<input type="checkbox"/>	Store collection All Products - Catalog sa...	Off	New Ad Set	Lowest cost	\$100.00		7-day click o...	—	—
			0 active ads	Link Clicks	Daily			Purchase	
	> Results from 1 ad @						7-day click or...	Purchase	

- Make sure that your reports cover crucial metrics, including the following:
- CTR Results (or number of actions taken)
  - Cost per action
  - Reach
  - Quality ranking

- Clicks
- Amount spent

	Campaign Name ↓	Delivery	Bid Strategy	Budget	Attribution Setting	Results	Reach	Impressions	
<input type="checkbox"/>	Engagement Track	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	Retarget Ghostwriting	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	Retarget Content Marketing	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	Cold Audiences Writing Services	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	Cold Audiences Writing 2.1	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	Cold Audiences Ghostwriting	In Draft	Lowest cost	\$20.00 Daily	--	--	--	--	
<input checked="" type="checkbox"/>	Cold Audiences Lead Forms	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	New Campaign	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	New Campaign	In Draft	Using ad set bi...	Using ad set b...	--	--	--	--	
<input type="checkbox"/>	New Campaign	Off	Using ad set bi...	Using ad set b...	7-day click o...	Purchase	--	--	Per Purchase
<input type="checkbox"/>	Example	No Ads	Using ad set bi...	Using ad set b...	7-day click o...	On Facebook Lead	--	--	Per On Facebook Le...
> Results from 11 campaigns ⓘ					7-day click or...	--	--	--	

You can also download visual representations including graphics from this dashboard, which can be helpful to show clients or other departments.

### 3. Start an Audit Report File

Before you actually start trekking through the audit itself to review the analytics you just downloaded, we strongly recommend starting a report document at the beginning. This will make it easier for you to plug the information where it needs to be.

We'll share our Facebook Ads audit template in the next section, but if you want to start from scratch, we recommend using an Excel-style program like Google Sheets. This will allow you to add comments, notes, and additional fields to each. In my experience, using a Sheets document to compile information is the most effective, and using a standard Word-doc style option for compiling an official report can be useful.

You can upload your CSV file with your ads data to sheets, which you'll use moving forward.

## 4. Assess the Value of Different Campaigns & Audiences

Review your different campaigns and your ads, and look for trends into what's working and what isn't.

For smaller accounts, it may be possible to review each ad. For larger accounts with hundreds of different ads, you can look at your highest-performing ads on your highest-performing campaigns.

Break this down by objective, audience, and stage of the funnel you're targeting. Look for the following:

- If any audiences seem to be particularly high-value or if any are neglecting to convert consistently; an ice cream shop may be running a campaign targeting vegan users for their vegan gelato, only to find that it consistently underperforms
- Which specific ads were most effective during split tests at driving clicks and desired actions taken; look for trends, like shorter copy, certain words in the messaging, or videos, carousel ads, or single image ads
- If some campaigns potentially cost more per action, and if so if they yielded higher quality results because of it
- Which stage of the sales funnel you're most effective at reaching; are your cold audience campaigns getting lots of clicks, but your lead ads are failing to hit the mark?
- Gaps in your campaign, like getting plenty of clicks but no conversions; this could be an issue with the landing page, with messaging, or with audience targeting
- The status of the rest of the checkout process. If you're doing an audit for a client, look at the landing page, the product pages, and even the checkout process. If there's a problem with conversions, any of these issues could be why. Check it on both desktop and mobile.

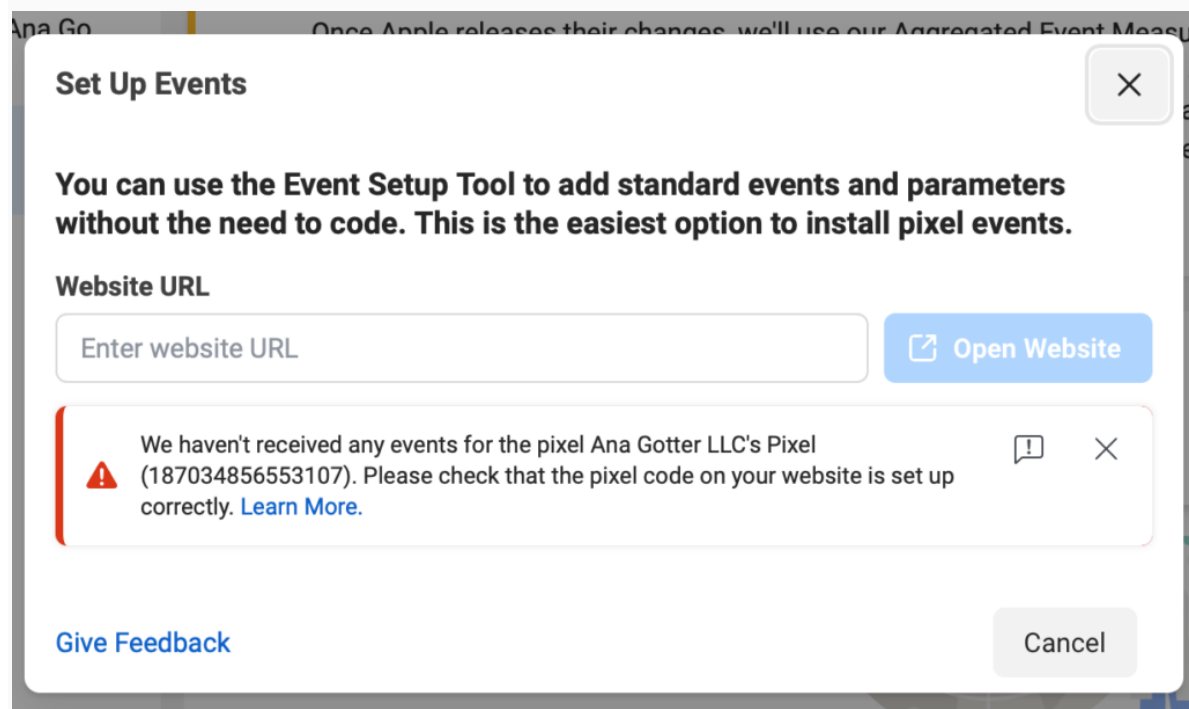
Take notes on all of this as you go through the process, writing down specific ads or campaigns to flag as needed.

## 5. Review All the Ad Tools You're Using

While the creatives, audience targeting, and bids are all important parts of Facebook Ads, the tools you're using are just as essential to potential success. At this stage, go through and ensure that everything is in working order and review the tools you're currently using.

This includes the following:

- Check that the tracking pixel is installed correctly and has the right events set up to track. You can learn more about this [here](#). Look at your custom audiences. Are your bases fully covered with the audiences that you have? Are there any issues, like retargeting customers who looked at product pages but forgetting to remove users who actually purchased from that list? There's no point in showing customers items they've already purchased.
- Review your product catalogs. Are your catalogs up to date? And the product categories optimized for success and relevant?
- Are your lead forms set up for success? Do they ask just enough information that you can qualify a lead without driving them away? Are users who sign up for a lead magnet able to receive it promptly?





We even recommend looking at ad structure at this point, including the following:

- Are the campaigns organized in a way that makes sense?
- Is it easy to find campaigns based on their name?
- Which attribution systems have you chosen for your campaigns, and why?

Write down everything that you find that needs to be updated or altered in any way.

## 6. Compile the Information into a Report

You've got a lot of data on-hand, and now you just need to compile it into a report. The report should include the following:

- Information and visuals about ad performance, including the core metrics discussed above
- Insight into which campaigns, ads, strategies, and creatives are working well, using at least several ad examples to highlight the trends
- Insight into which campaigns aren't working and why, using the same formatting as above
- Data about the most profitable audiences on the platform, and the least profitable; this can help you alter your campaigns or determine who to place higher value on moving forward
- Anything that you flagged that could impact campaign performance, like weak landing pages, complicated checkout processes, incorrect audience targeting, word choice, and more.
- Areas that could be improved, and (if relevant to the audit) suggestions for how to rectify or improve existing ads
- A report about anything that needs to be resolved with Facebook Ad tools or structure, including how to organize ads or making changes with the tracking pixel
- A final summary with a "what next."

