## Conversion Leads Adding Quality to your Lead Ads

**DEVELOPER'S GUIDE** 



### Sections

- I. Overview
- II. Retrieving Leads
- III. Sending CRM Events
- IV. Sales Funnel Setup
- V. Further Reference

### I. Overview

## Lead Ads Quality (Conversion Leads) The Product

This is a Deep-Funnel Optimization (DFO) product, i.e., it optimizes for an offline event.

But requires Lead Ads campaigns - onsite (i.e., FB or IG) lead generation!

With a (simplified) sales **funnel** with 2-4 events (we recommend 4 distinct events):

- You can also have "negative" events, if you will.
- · After defining your funnel, do not change it, if you have already started sending events!
- Make sure the stage you select to optimize for has a conversion rate between ~3-40% generally, the next-to-last stage is a good choice.

## Lead Ads Quality (Conversion Leads) Summary

**Use case**: for advertisers running **Lead Ads**, that want to optimize for the quality of the leads generated, when the ultimate conversion does not happen online.

Optimization window: up to 28 days.

Event source (in which channel does the event happen): CRM/Offline Data.

CAPI required: Yes.

Signal quality: generate at least 250 leads per month,

and at least 120 events (in total) per month.

Backfill: You can backfill your data for up to 7 days in the past.

#### I. OVERVIEW

## Lead Ads enable people to express interest with one click and businesses to meet their goals

#### Create mobile-first custom forms with Leads Ads

Inform people about your business and choose from a multitude of features to create a custom form that serves your needs.

#### Optimize for the leads that matter for your business

Choose whether you want Meta to maximize the number of leads generated or optimize for leads that are more likely to convert.

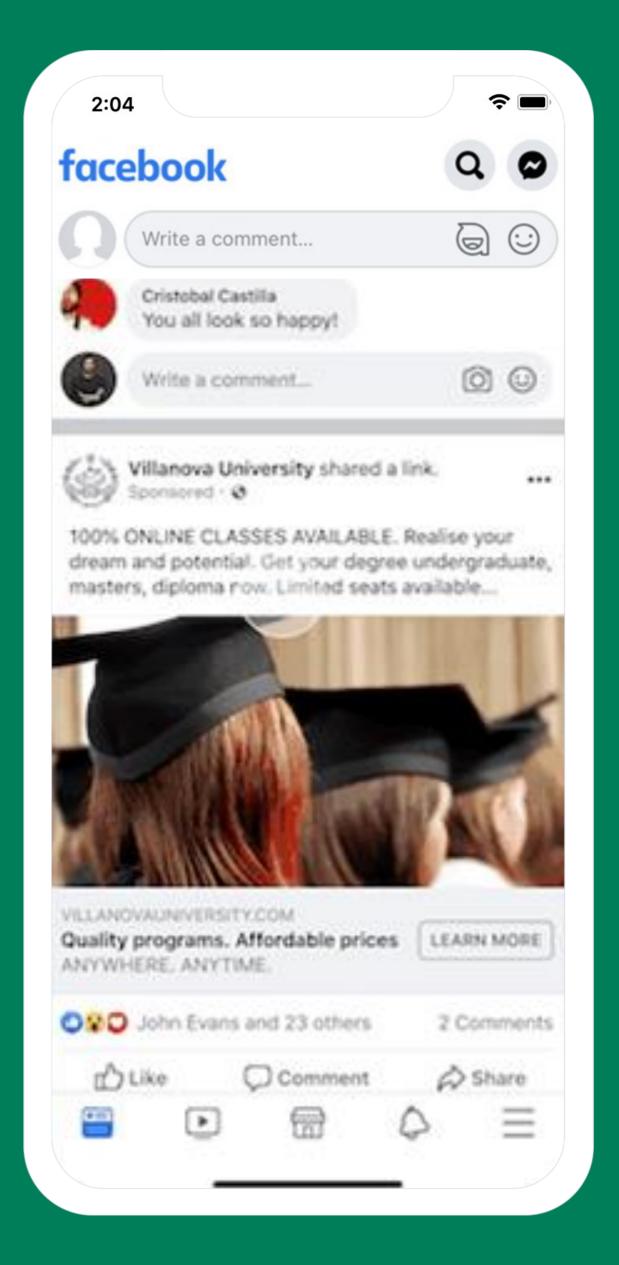
#### Integrate seamlessly with your existing workflow

Integrate your CRM for new leads to be sent automatically to you.

20%

lead to sale conversion rate increase on average for Lead Ads studied using the new Conversion Leads quality optimization with a CRM integration compared with existing optimization\*

\*Results from backend CS-BQRT test conducted in October 2020 for 26 CRM integrated advertisers from 9 verticals and 10 countries; existing optimization optimizes for volume of leads; quality increase is based on optimizing for a single step between when a lead is created and final sale. Thus, an increase in conversion rate may not always mean an increase on the final sale.



LEAD ADS (INSTANT FORMS)

#### I. OVERVIEW



### We've focused on in improving lead quality with Conversion Leads

In back-end tests conducted in Oct.

2020 for 26 CRM integrated
advertisers across verticals and
countries, lead ads that used
conversion leads optimization goal saw
on average:

>20%

increase in lead to sale conversion rate compared with existing optimization

Research across 18 CRM integrated advertisers in a front-end split test study conducted in Oct. 2020 suggested that quality optimization:

drove higher lead to sale conversion rates

drove lower cost per qualified leads

80%

42%

of the time

of the time

Note: Quality increase is based on optimizing for an event between when a lead is created in the client's CRM system and when a final sale occurs. Thus, an increase in conversion rate may not always mean an increase in final sales.

Sources: Backend CS-BQRT tests with 26 CRM integrated advertisers across multiple regions and verticals starting on 2020-10-05 and ending on 2020-11-09; Front end split tests with 18 CRM integrated advertisers across multiple regions and verticals starting on 2020-10-05 and lasting between 3 to 5 weeks.

## Lead Ads Quality (Conversion Leads) Implementation in Three Steps

- 1) Retrieving Leads we need the "leadgen\_id" (lead id) attribute
  - Before, a Lead generation campaign with an ad set optimized for Leads
    - Do not use "Conversion Leads" optimization until your model is fully integrated!
- 2) Sending CRM Events we need at least two different events/day for one week
  - Via CAPI, using the (newly created) CRM Pixel
- 3) Sales Funnel Setup to integrate the client model with our platform
- After, a Lead generation campaign with an ad set optimized for Conversion Leads can be created.

## Lead Ads Quality (Conversion Leads) Prerequisites

A FB Page

An Instant Form - only "onsite" leads are supported as of now

A FB App

A new CRM pixel - we do recommend creating a new pixel in this case

## Lead Ads Quality (Conversion Leads) Support Tools

#### Accelerator (Webhook sample code and Postman collection)

https://github.com/fbsamples/lead-ads-webhook-sample

#### Lead Ads Forms ("instant forms" for a Page)

https://business.facebook.com/latest/instant\_forms/forms

#### Lead Ads Testing Tool

https://developers.facebook.com/tools/lead-ads-testing

#### Down Funnel Events (CRM events):

https://developers.facebook.com/tools/lead\_ads\_down\_funnel\_events/?data\_source\_id=<pixel id>

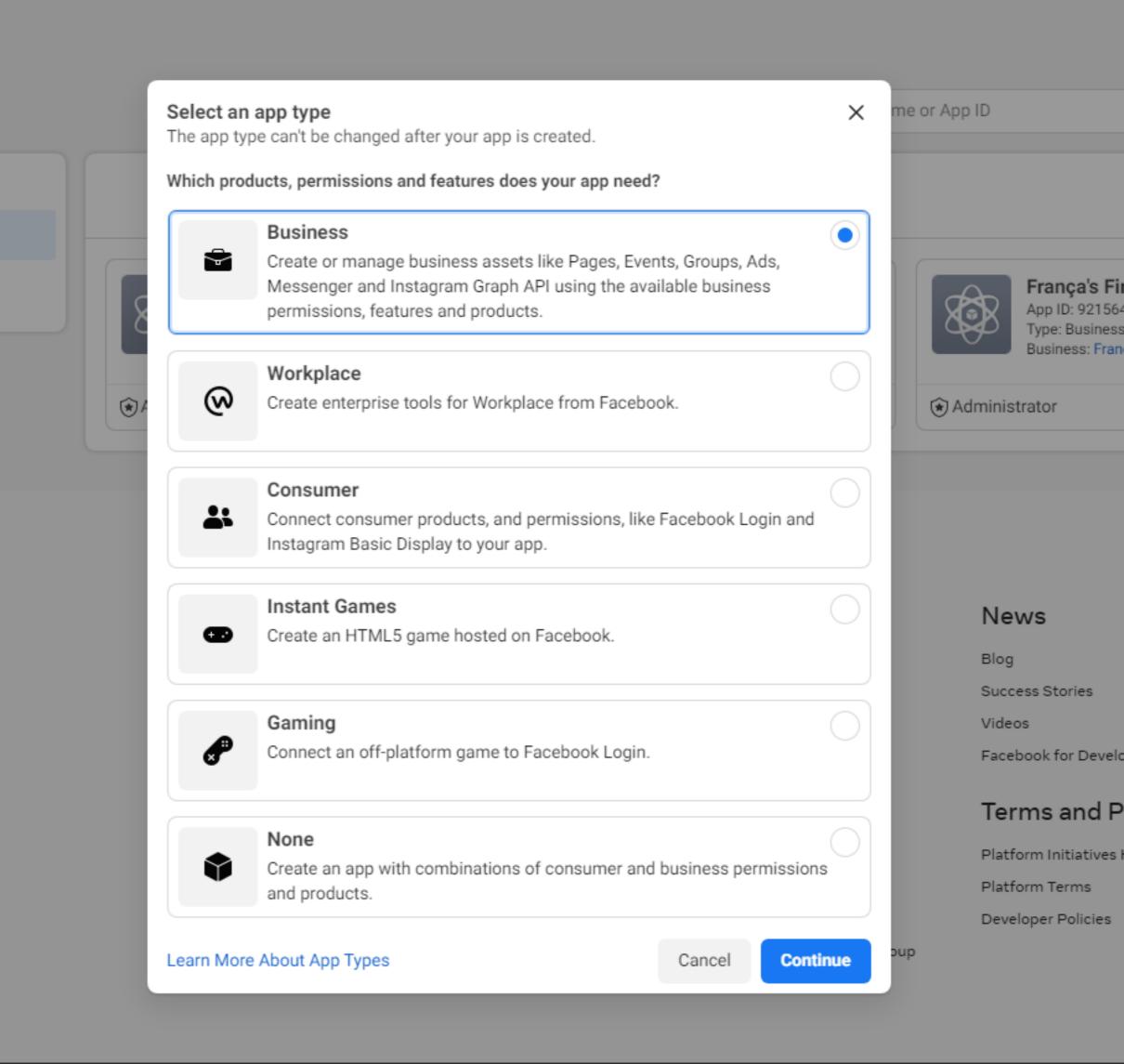
### II. Retrieving Leads

#### II. RETRIEVING LEADS

## Creating a FB Application

https://developers.facebook.com/apps/

- Settings, Basic
  - App Domains:
    - e.g., api.<your-domain-here>
  - Privacy Policy URL
  - [Add Platform]
    - Website
- Products, Add Product
  - Webhooks



About Create Ad Careers Privacy Policy Cookies

## Example of A REST Resource (Controller from GitHub sample)

WebhooksController class inherits from ControllerBase, annotated with [Route("api/[controller]")] [Produces("application/json")].

Define the GET method (validates the subscription).

- public IActionResult VerificationRequest(
  - [FromQuery(Name = "hub.mode")] string mode = "",
  - [FromQuery(Name = "hub.challenge")] string challenge = "", // An int you must pass back to us.
  - [FromQuery(Name = "hub.verify\_token")] string verifyToken = "")

Define the POST method (receives the notification of new leads).

- public IActionResult YouGotANewLead([FromBody] JsonElement body)
  - var leadgen\_id = value.GetProperty("leadgen\_id");
  - string leadgen\_idString = System.Text.Json.JsonSerializer.Serialize(leadgen\_id);

## Creating a Subscription – step 1/2 (@App side...)

Using the Application Access Token

POST https://graph.facebook.com/v{{api version}}/{{app id}}/subscriptions

- object page

- fields leadgen

- verify\_token <a-creative-passphrase-here>

callback\_url https://<my-endpoint>/api/webhooks

- And to confirm...
  - GET https://graph.facebook.com/v{{api version}}/{{app id}}/subscriptions
  - (or) https://developers.facebook.com/apps/<your-app-id>/webhooks/?business\_id=<your-business-id>

## Creating a Subscription – step 2/2 ([for each] @Page side...)

#### Required permissions:

- [business\_mangement, pages\_show\_list], leads\_retrieval, manage\_pages
  - pages\_manage\_ads, pages\_manage\_cta, pages\_manage\_engagement,
     pages\_manage\_instant\_articles, pages\_manage\_metadata, pages\_manage\_posts

With a System User Access Token (linked to a Facebook App), list the available pages (and correlated tokens)...

GET https://graph.facebook.com/v{{api version}}/{{system user id}}/accounts

Then, with a Page Access Token...

POST https://graph.facebook.com/v{{api version}}/{{page id}}/subscribed\_apps?subscribed\_fields=leadgen

Finally, to confirm...

GET https://graph.facebook.com/v{{api version}}/{{page id}}/subscribed\_apps

#### II. RETRIEVING LEADS

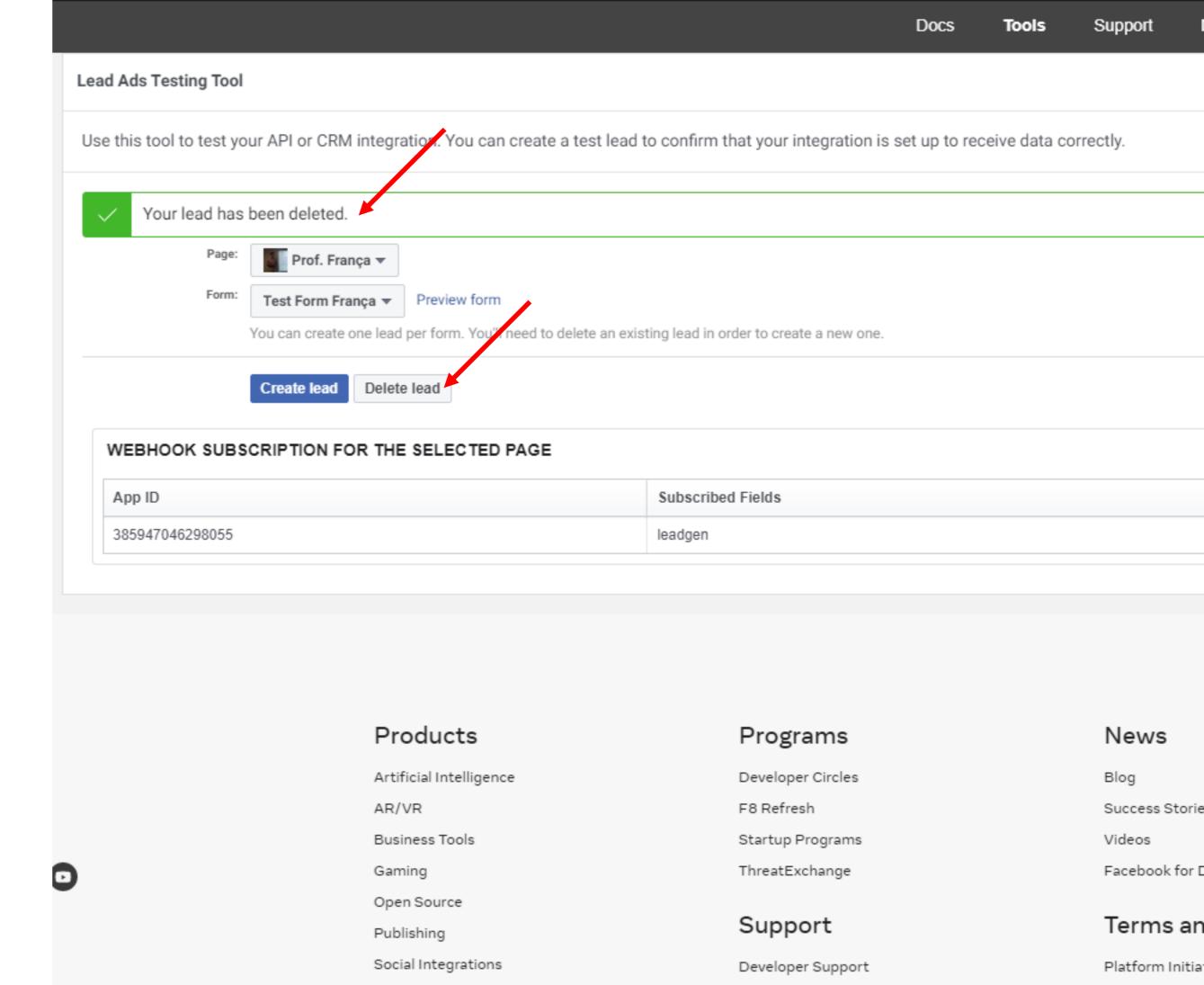
## Testing the Lead Ad (And the webhook...)

Testing Tool (only one test lead is allowed)

- https://developers.facebook.com/tools/lead-ads-testing
  - Page
  - Form
  - Create lead

Retrieving the Lead

- GET https://graph.facebook.com/v{{api version}}/{{leadgen id}}
- (or) Bulk Read



Bugs

Sitemap

Platform Status

Facebook for Developers Community Group

About Create Ad Careers Privacy Policy Cookie

Platform Term

Developer Poli

Social Presence

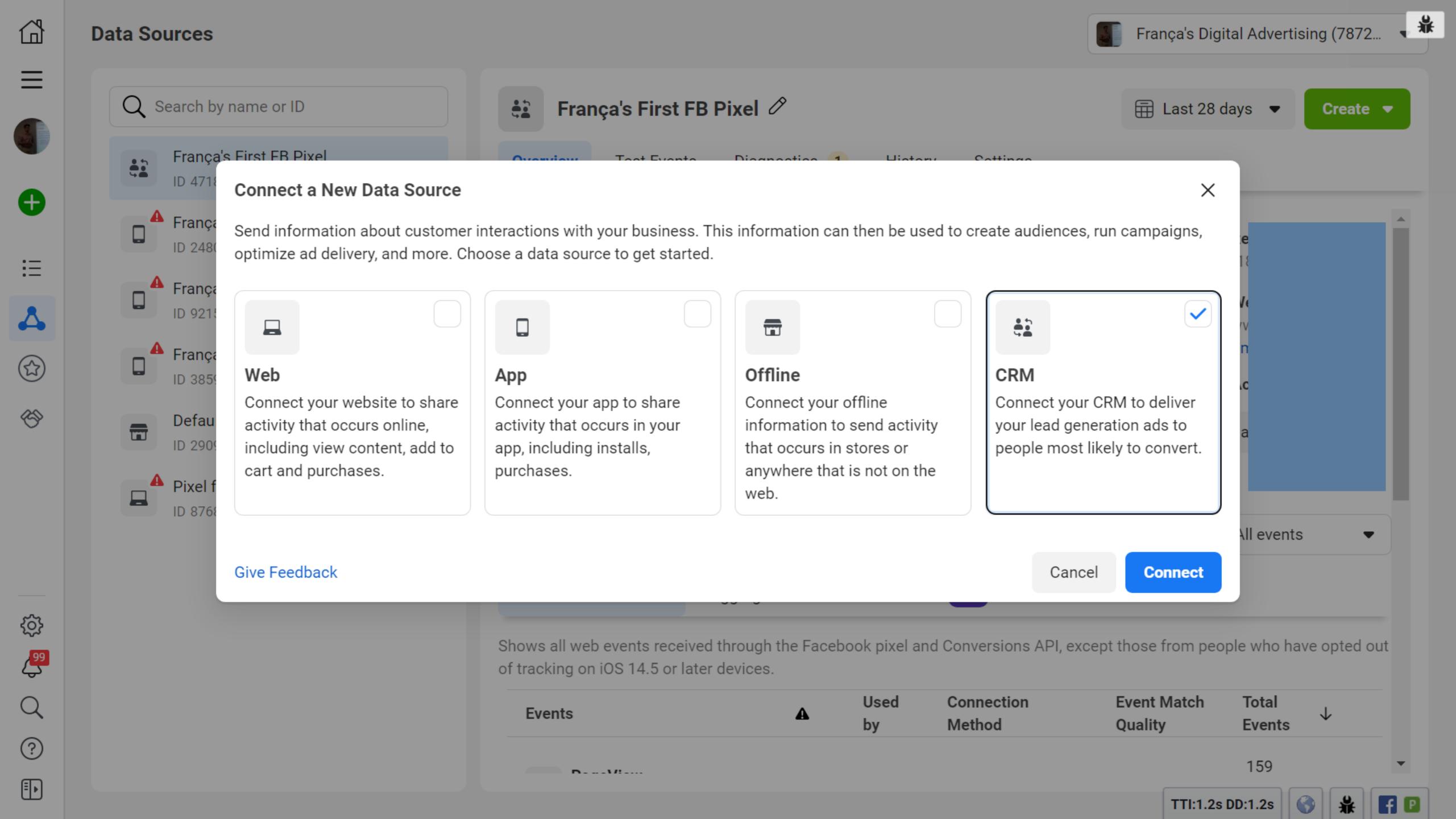
### III. Sending CRM Events

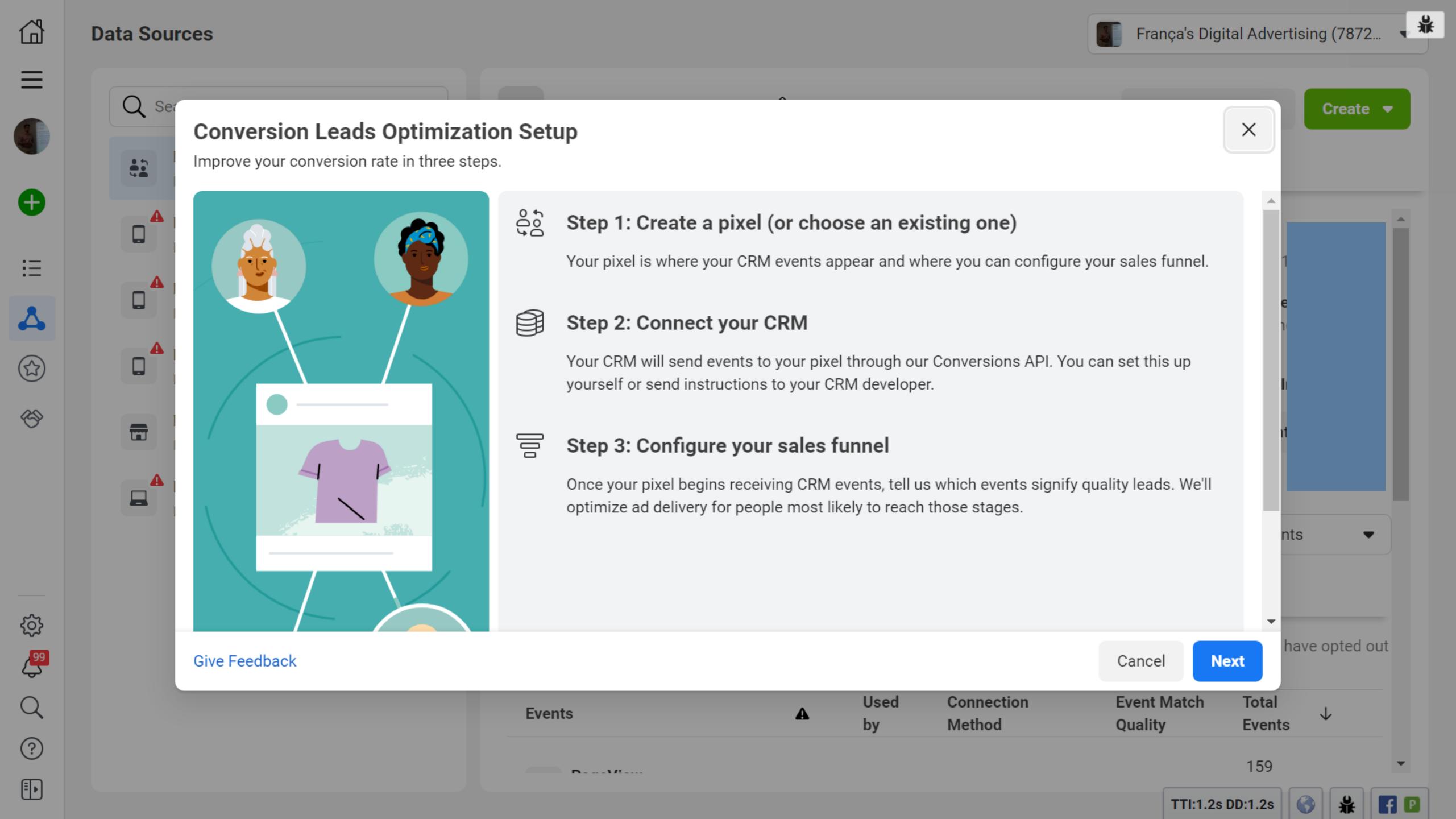
### Specifying the Pixel (id)

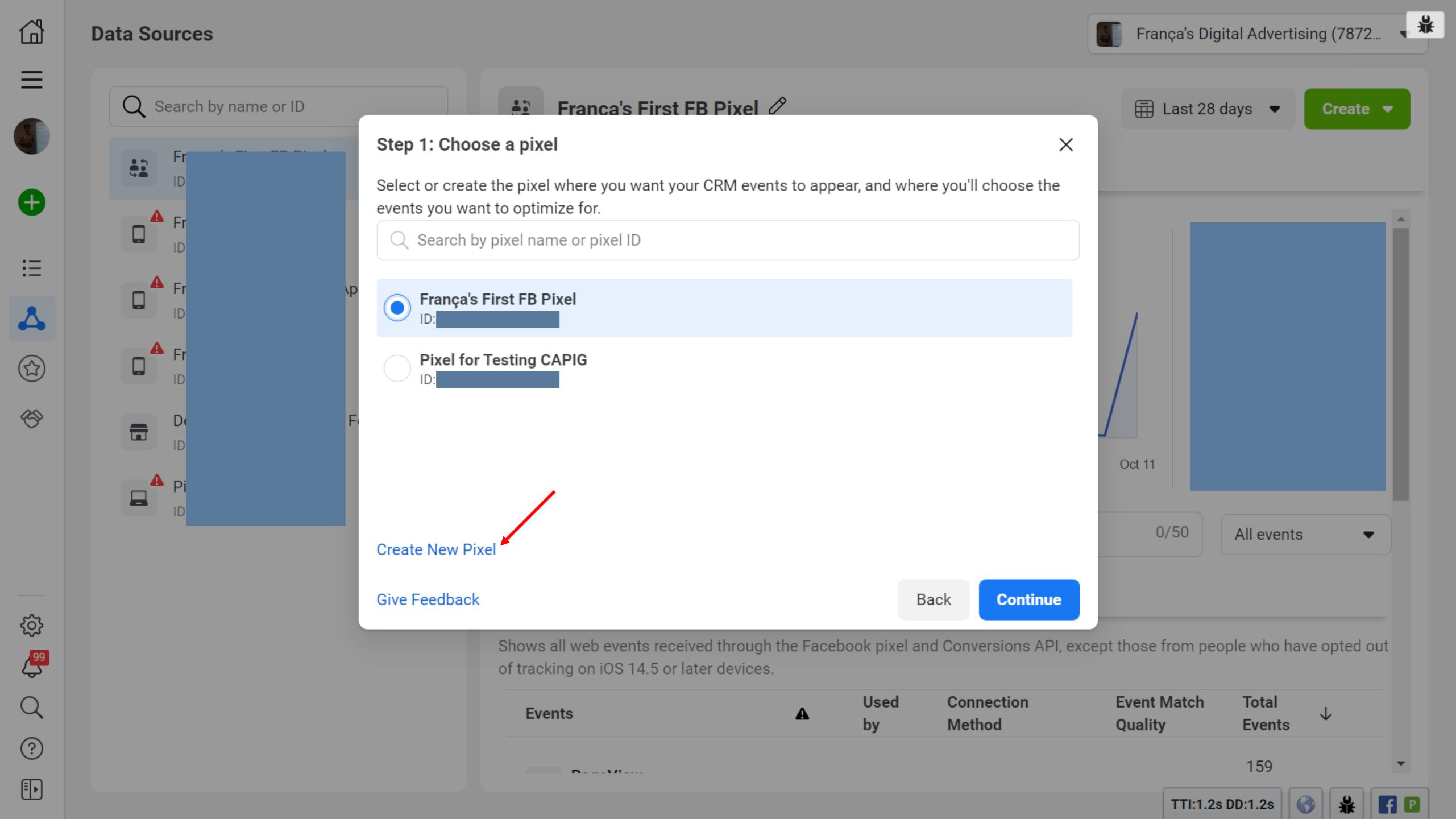
You don't really need a "Web Pixel" installed into a Page...

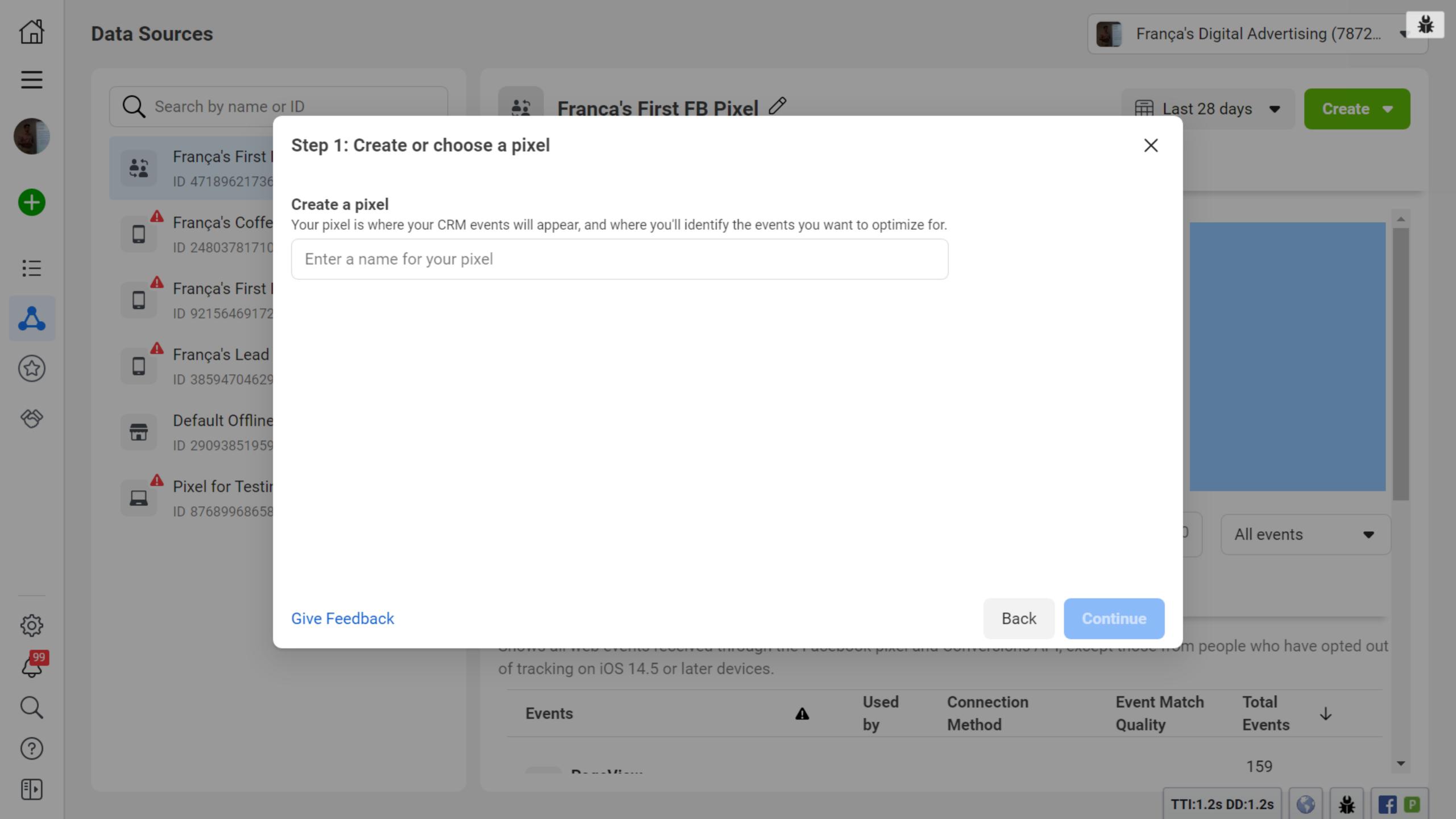
We do recommend creating a separate pixel for this CRM integration.

A system user token must be generated.









#### Generate an Access Token

An access token gives you access to the Conversions API. Each time you make an API call, you'll be required to use your access token.

Generate your access token and then copy it from below. For your security, Facebook won't save your access token. If you forget your access token, you can create a new one. Learn More

**Generate Access Token** 

Last creation: Oct 11, 2021, 11:13 AM by Marcelo França

#### Sending CRM events through the Conversions API

Once you have an access token, choose which CRM events you want to send, build your payload, and make requests. Your payload will include information about the events and parameters you send.

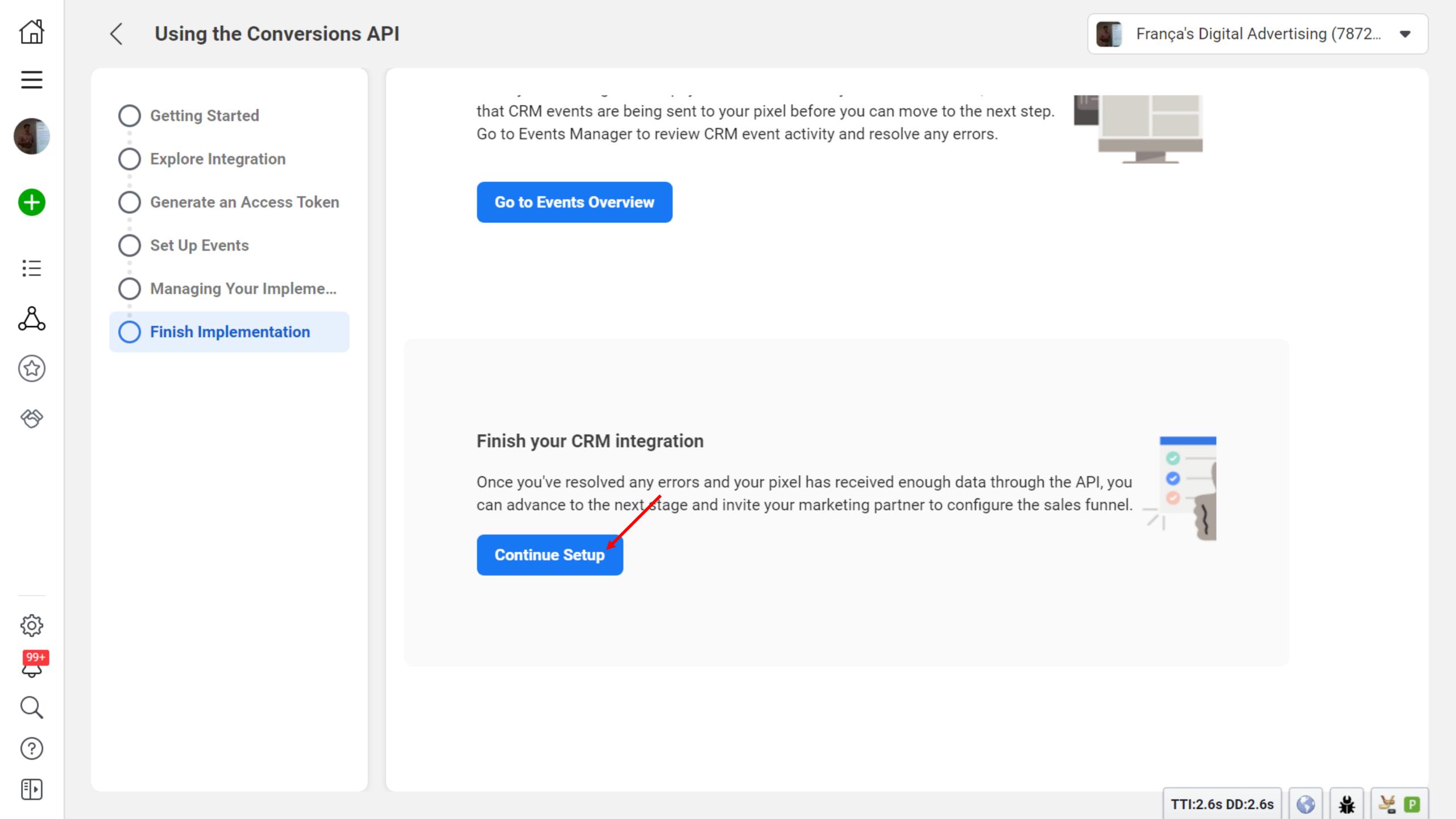
#### Make a POST Request

To send new CRM events, make a POST request to this API's /events edge from this path: https://graph.facebook.com/{API\_VERSION}/{PIXEL\_ID}/events?access\_token={TOKEN}.









### Sending (offline) Events

A Postman Collection is available at the FB Samples (GitHub) repository.

The (custom) event "name" can be "anything" - it is NOT a default event.

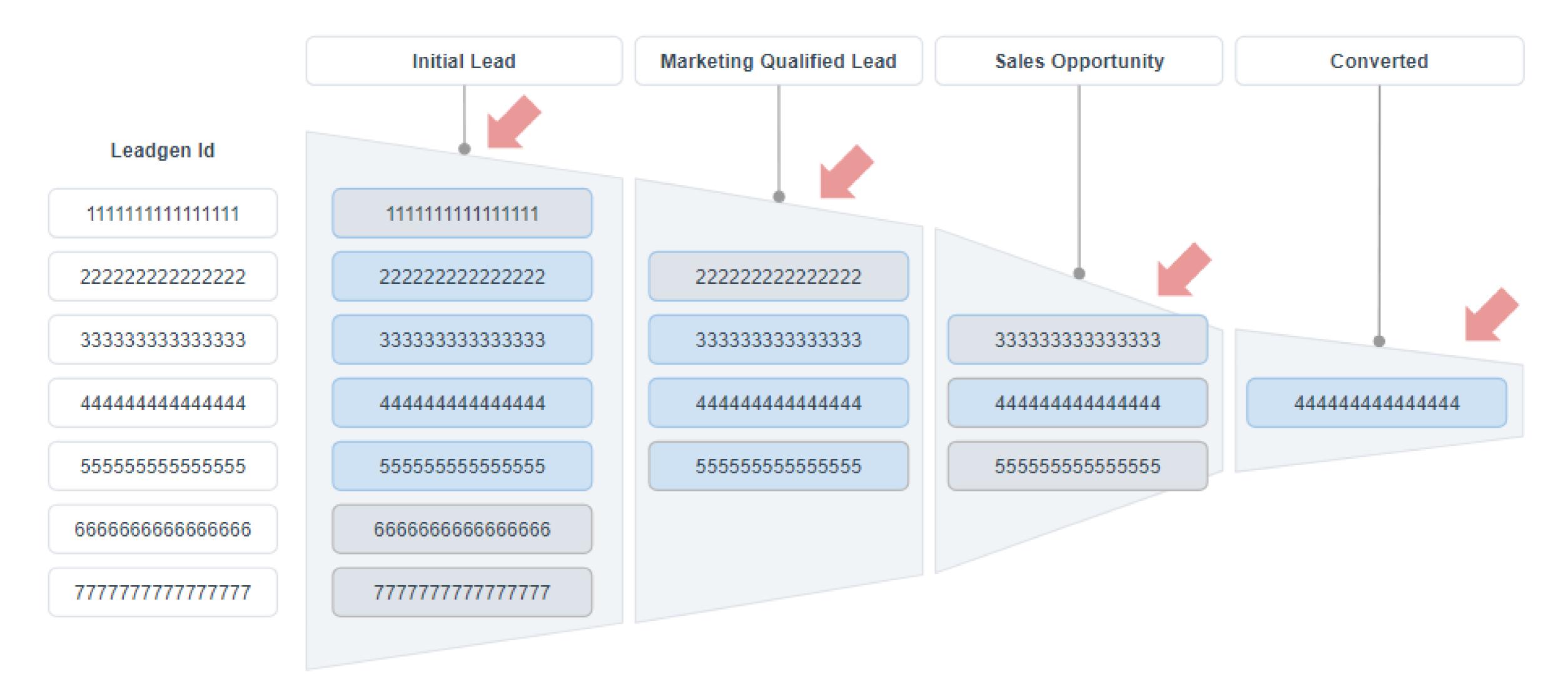
Be mindful that events might still get discarded for privacy reasons, though.

We recommend clients to save "fbtrace\_id" on their systems.

Two events are the minimum, but we recommend four.

• You might want to optimize for the next-to-last (in this case, the third) later...

### Example of a 4-step Funnel

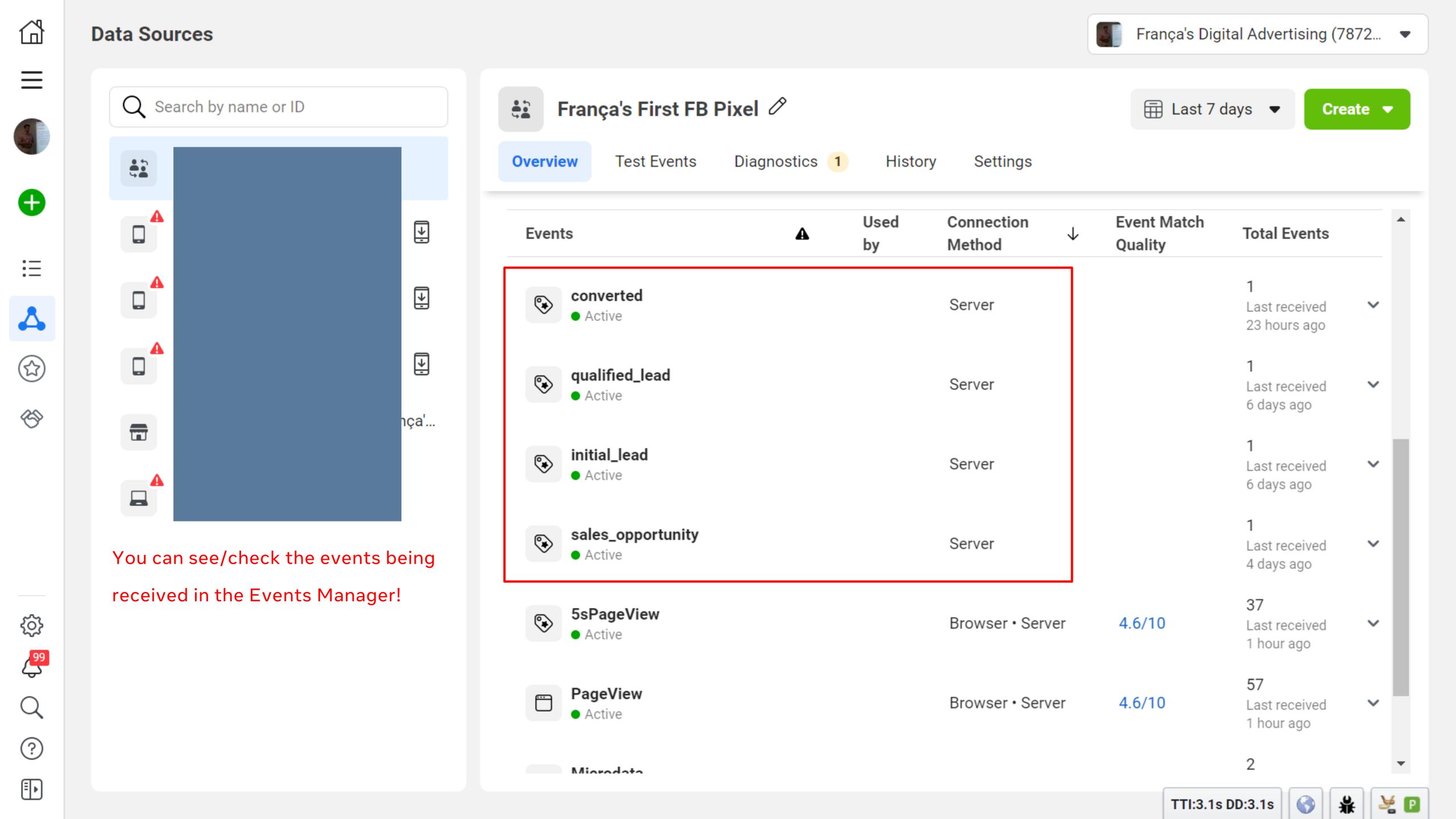


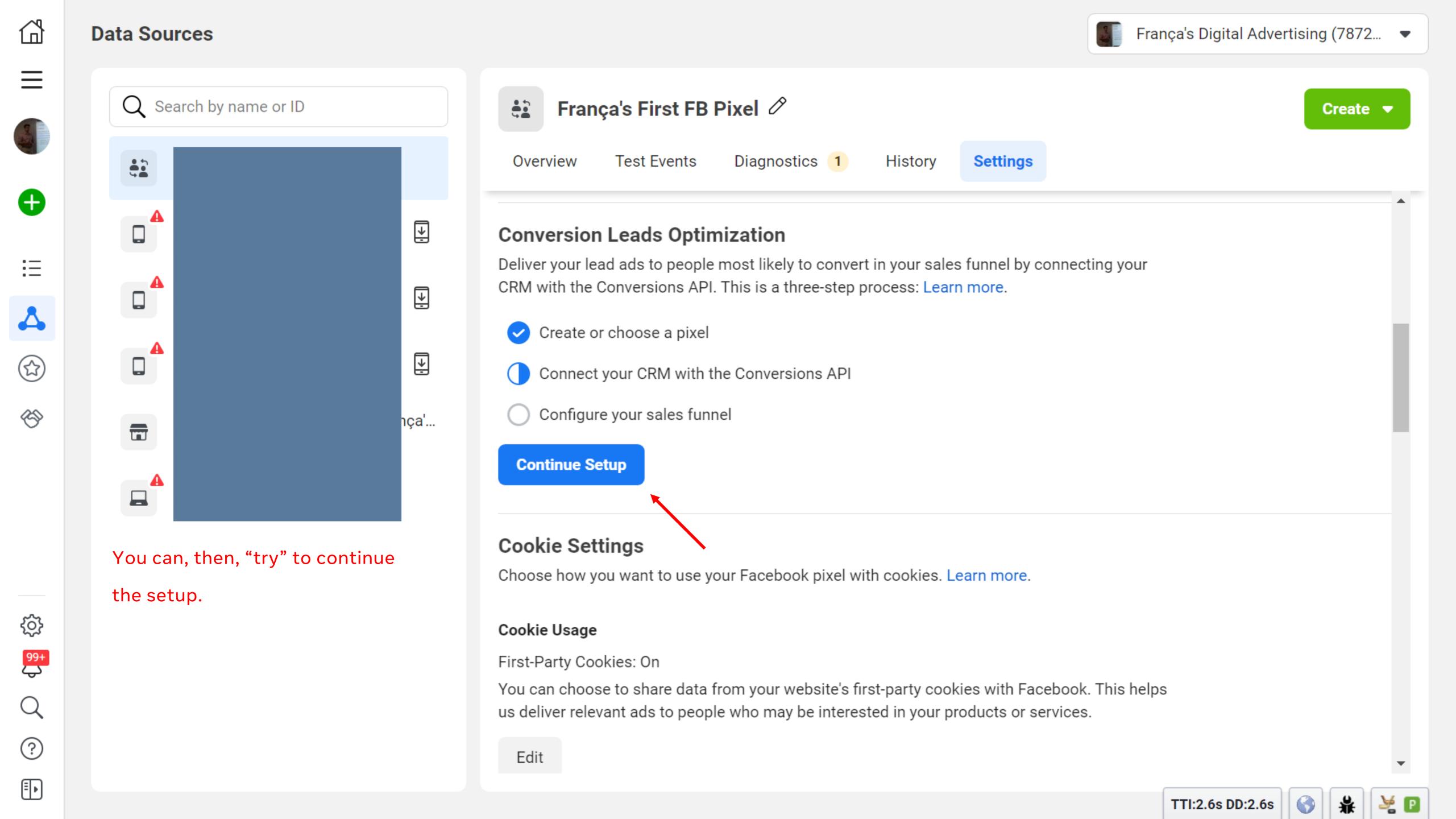
### Example of Events

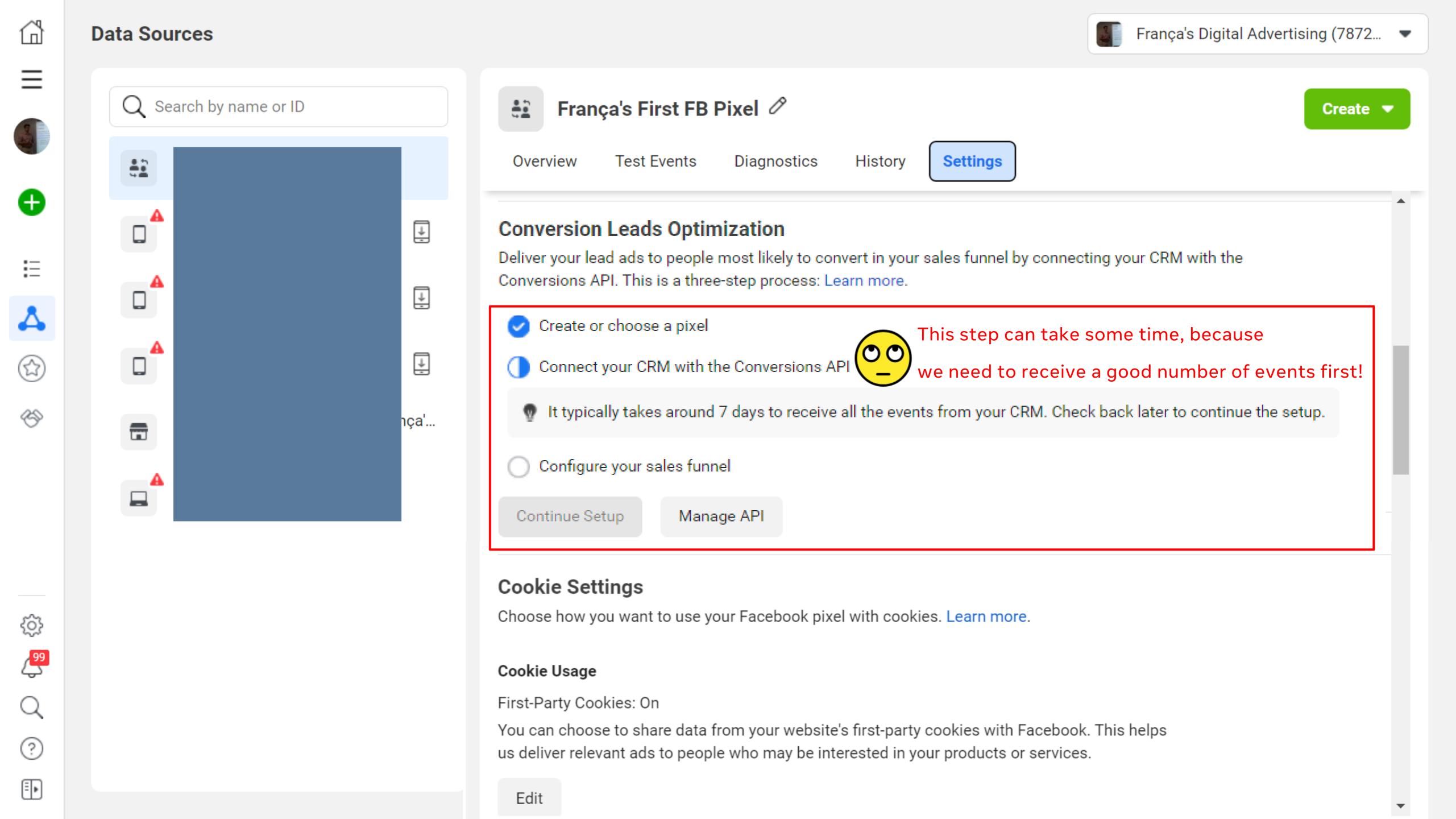
	1		2		3		4	
Leadgen Id	(Initial) Lead	fbtrace_id	Marketing Qualified Lead	fbtrace_id	Sales Opportunity	fbtrace_id	Converted	fbtrace_id
1	10/11/2021 Aa		11/11/2021 A7	TDCTacc_Id	12/11/2021 AO	_	16/11/2021 AC	
5	11/11/2021 AR	-	12/11/2021 AN		16/11/2021 Ao	<b>-</b>		
2	12/11/2021 AQ							
6	16/11/2021 AZ	f						
8	16/11/2021 Ah		17/11/2021 Ai1		18/11/2021 A0		19/11/2021 A7	
4	16/11/2021 Az		17/11/2021 A-J					
3	16/11/2021 A_							
1	16/11/2021 AR		17/11/2021 Ae		18/11/2021 A6			
5	17/11/2021 A3	<b>{</b>	18/11/2021 Ae		19/11/2021 AX	8		
3	17/11/2021 Ar\		18/11/2021 As					

### Example of Detected Funnel









Deliver your lead ads to people most likely to convert in your sales funnel by connect CRM with the Conversions API. This is a three-step process: Learn more.

- Create or choose a pixel
- Connect your CRM with the Conversions API
- Configure your sales funnel

Continue Setup

Manage API

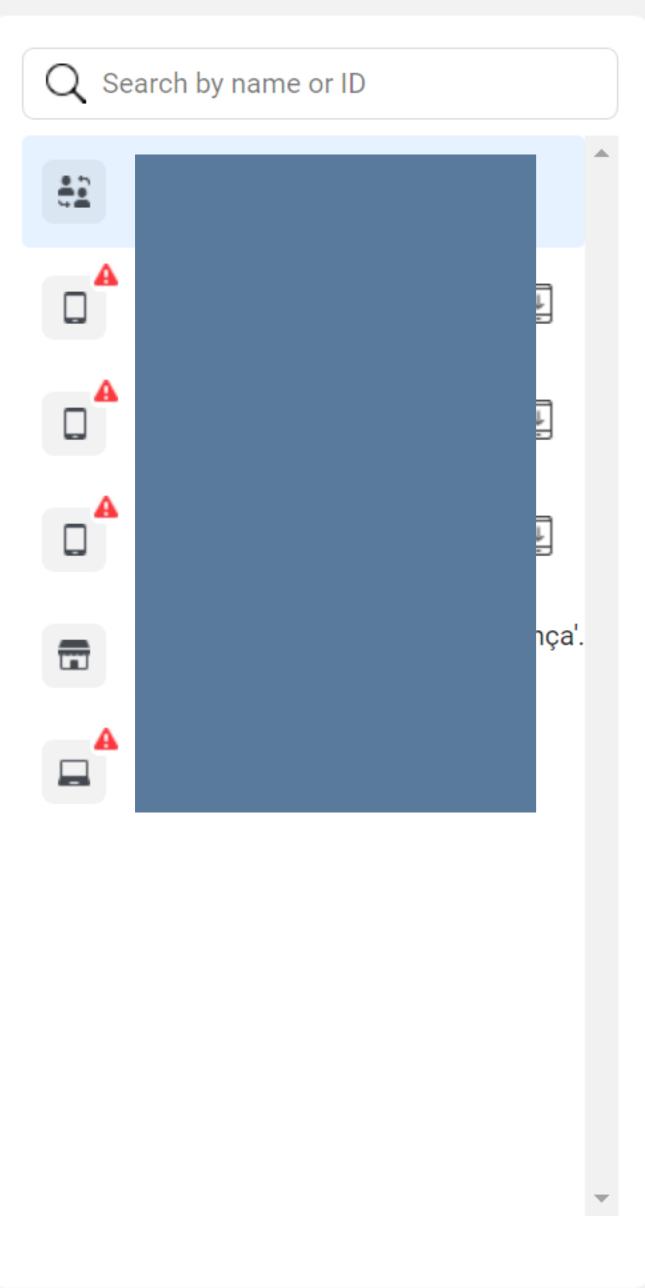
Again, make sure you're sending the minimum required regularly.

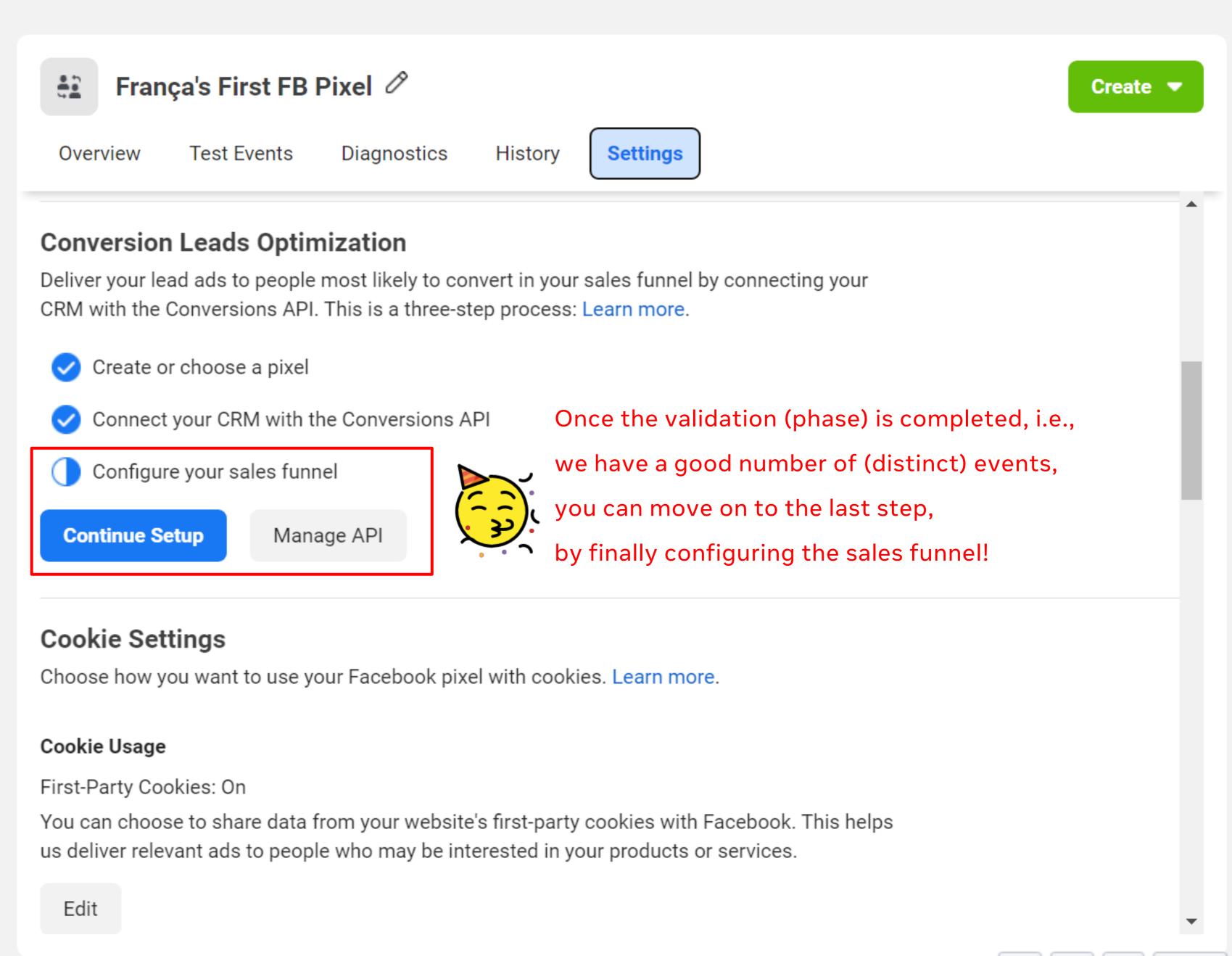
Also, check the **Down Funnel Events** support tool for more information!

Your CRM integration is pending additional activity or may have errors to resolve. Check your pixel.

# Data Sources Search b

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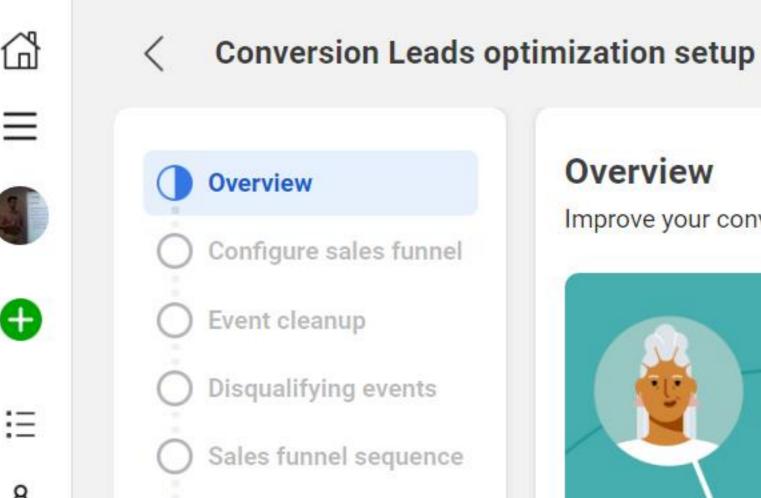




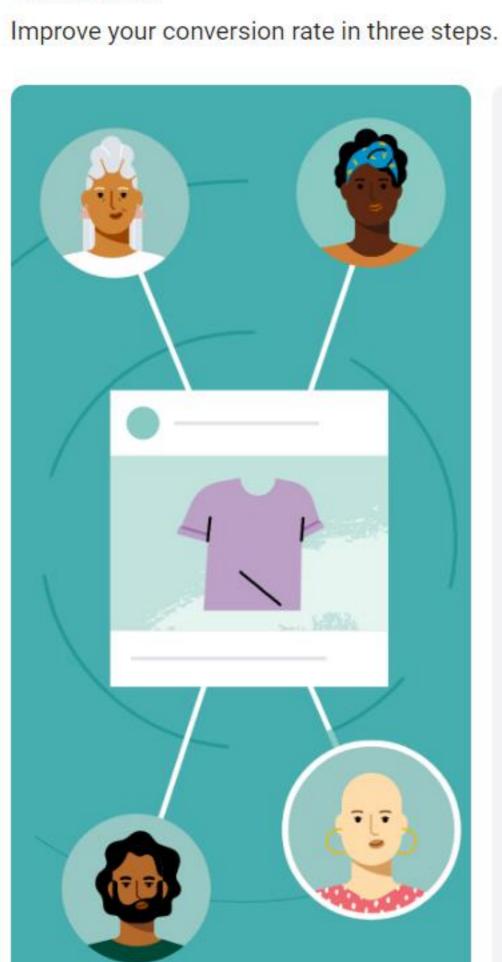




### IV. Sales Funnel Setup



**Optimization target** 





Your pixel is where your CRM events appear and where you can configure your sales funnel.

#### Step 2: Connect your CRM

Your CRM will send events to your pixel through our Conversions API. You can set this up yourself or send instructions to your CRM developer.

#### Step 3: Configure your sales funnel

Once your pixel begins receiving CRM events, tell us which events signify quality leads. We'll optimize ad delivery for people most likely to reach those stages.

Give Feedback

Cancel





















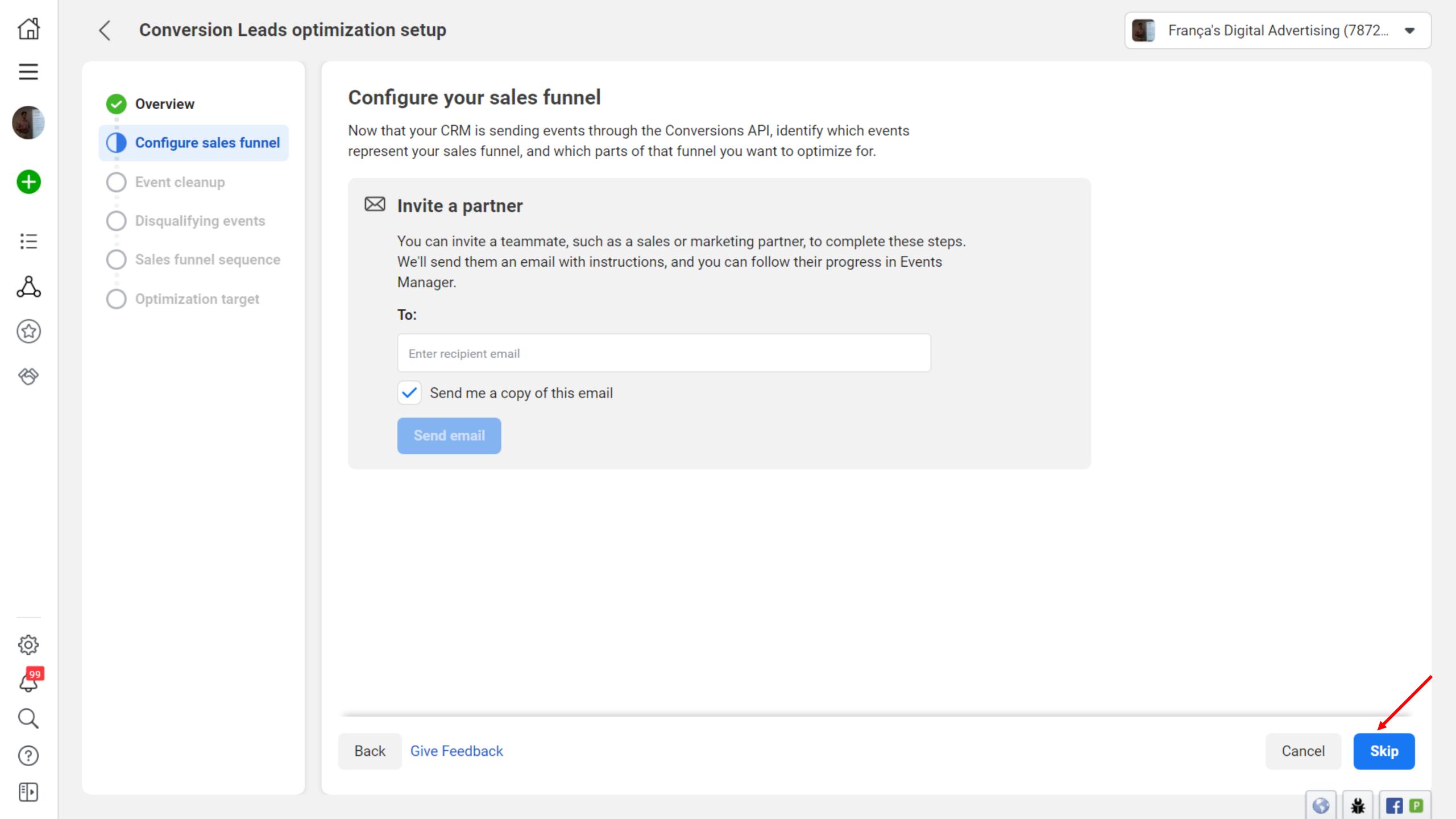


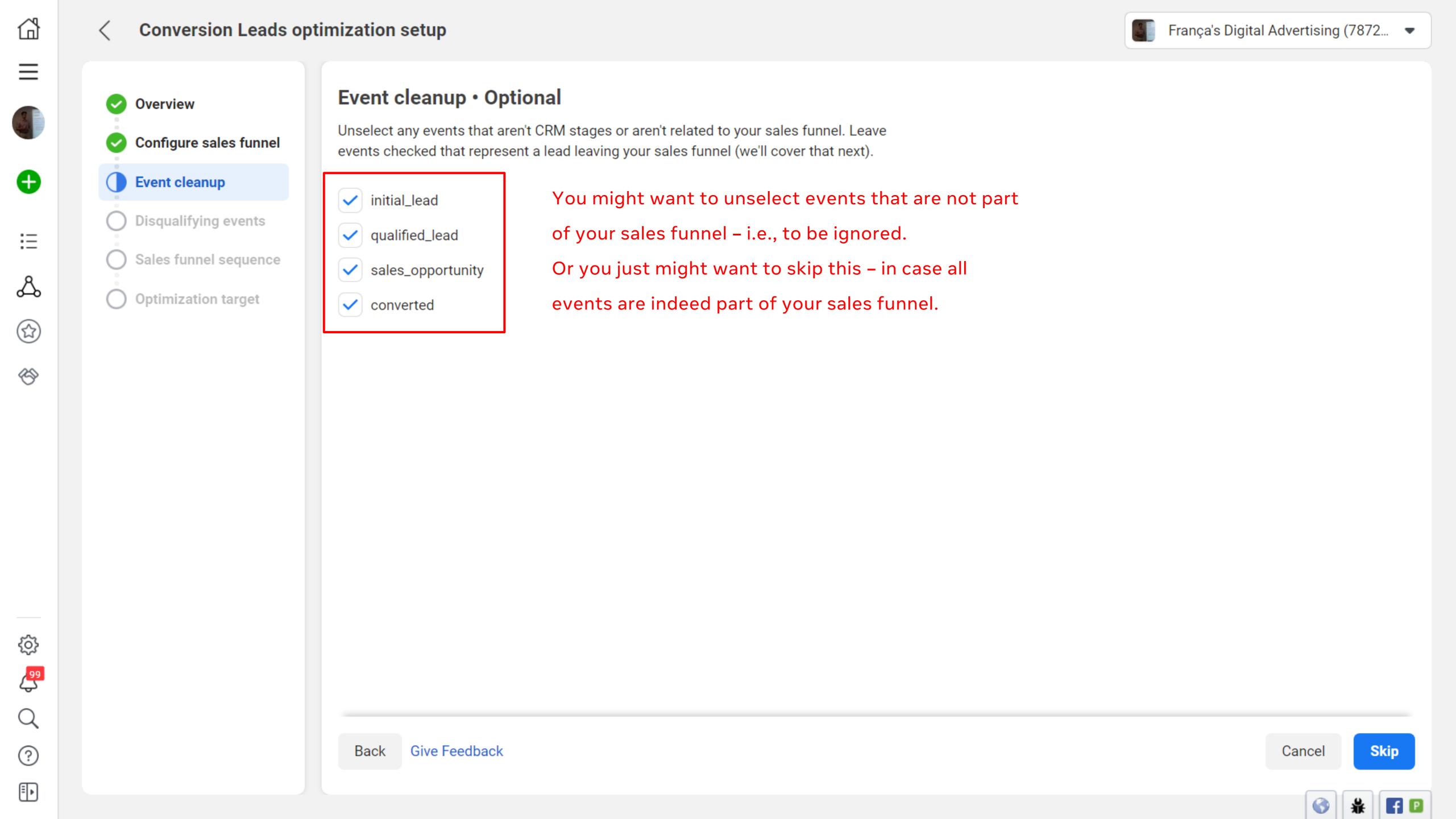


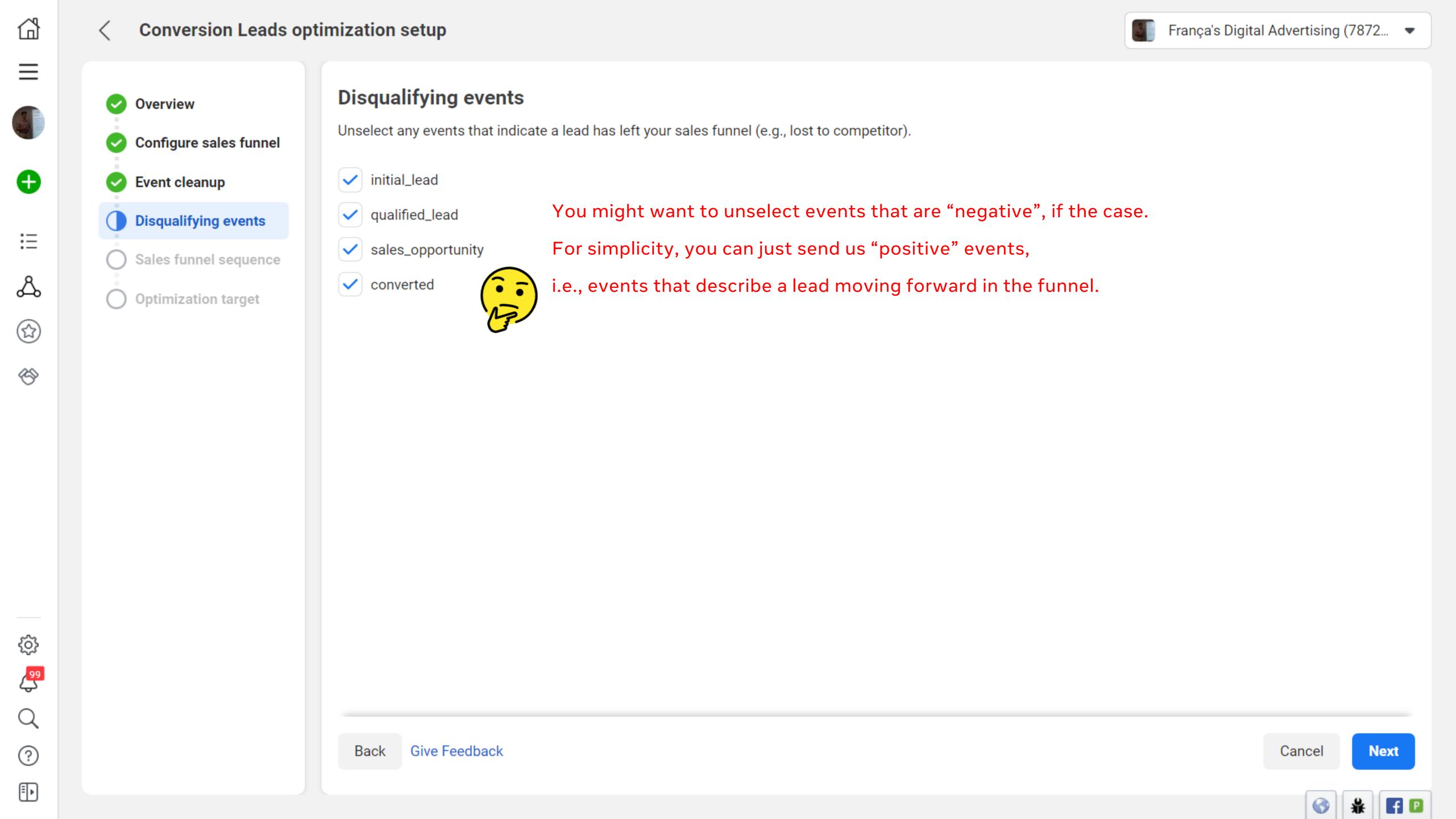


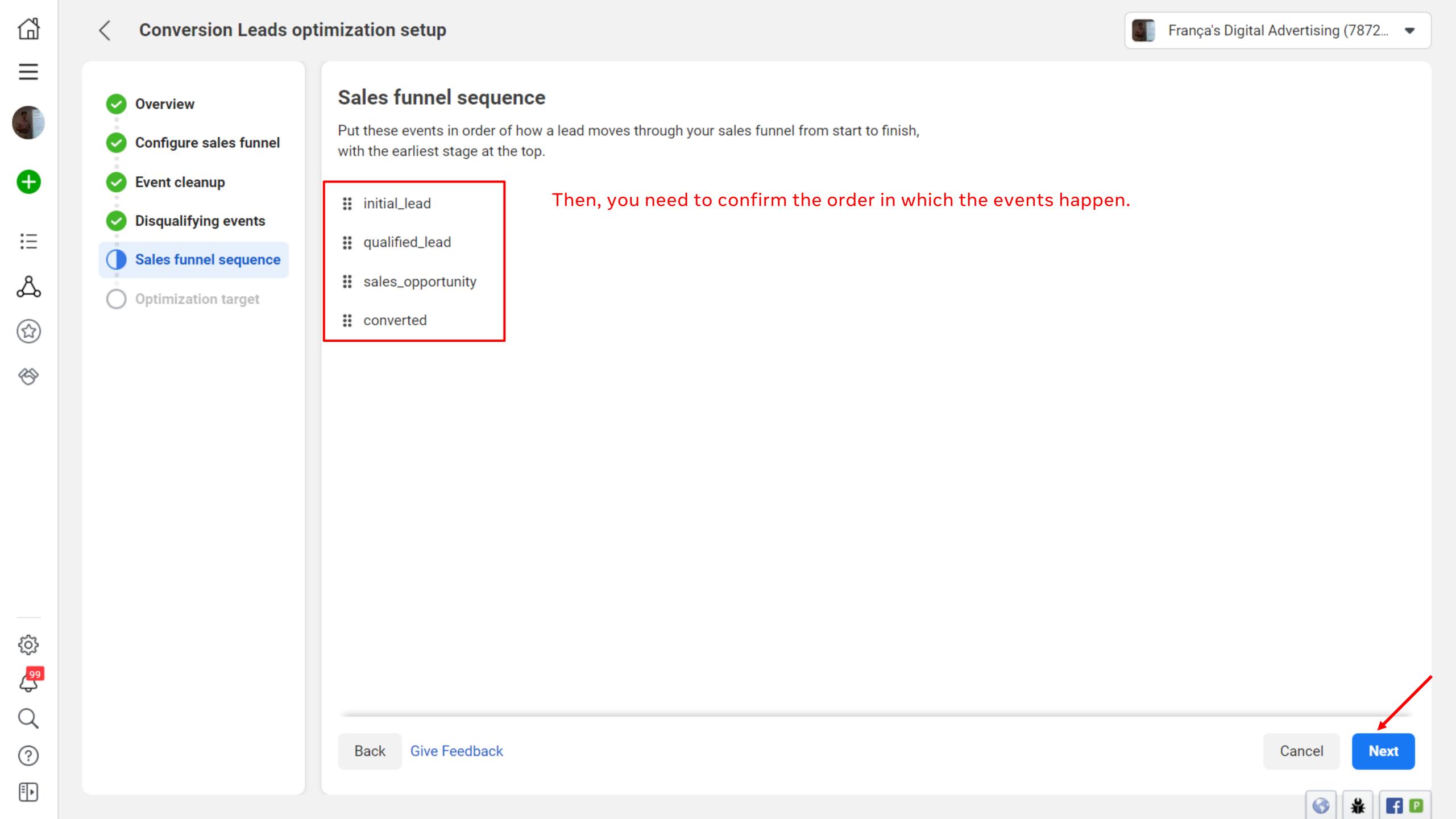


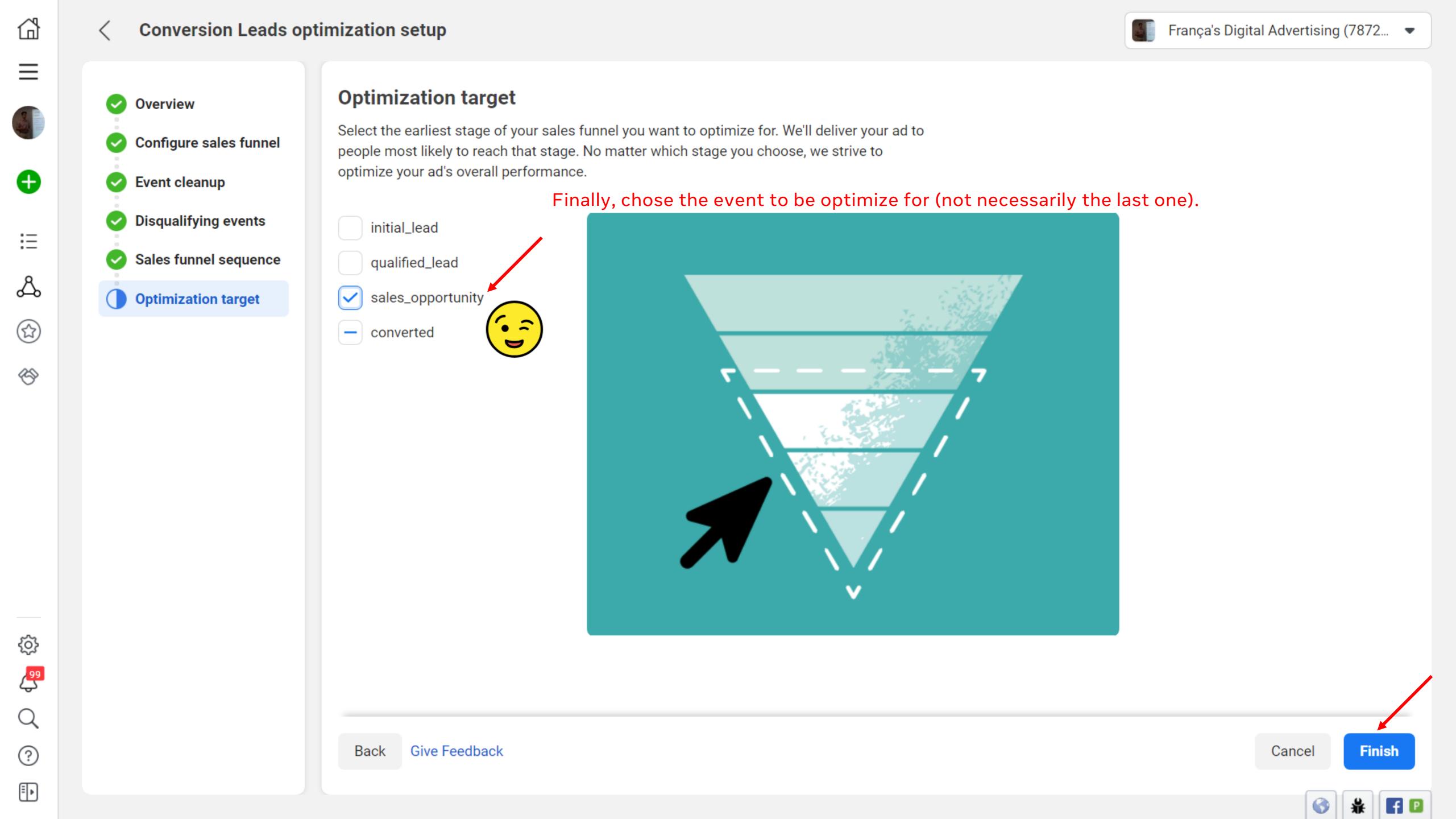












Event cleanup

Disqualifying events

**Optimization target** 

Sales funnel sequence



França's Digital Advertising (7872... 🔻



your model to be fully integrated in our systems - this phase can take longer than one month,

depending on the quantity and quality of your data.



#### You configured your sales funnel.

You've successfully integrated your API and configured your sales funnel. The conversion leads optimization will now attempt to deliver your ads to people most likely to convert based on your sales funnel activity, which you can monitor in Events Manager.

**Continue to Events Manager** 

#### Go to Ads Manager

For example, if it normally takes 14 days for a lead to convert, then we would need at least that many days of good data uploaded. Once your integration is complete and passed the funnel analysis, there is a 30+ day training period before your integration is added to the production model.

Back Give Feedback







































Produtos

Programas

Documentos

Mais

Meus aplicativos

#### Anúncios de cadastro: ferramenta de teste de eventos de funil descendente

Selecione uma fonte de dados ▼ Enviar You can check the progress by using the following URL:

https://developers.facebook.com/tools/lead\_ads\_down\_funnel\_events/?data\_source\_id=<CRM-Pixel-Id>

# Anúncios de cadastro: linha do tempo de eventos de funil descendente Events

Eventos de amostra Tempo de carregamento do eviconte do evento de cadastro Estágio do ciclo de vida Contém identifiicação de cada®ados Horário do evento

O número de eventos de cadastros enviados nos últimos dias é muito baixo!

{"lead\_event\_source":"In-house CRM","event\_source":"crm"}







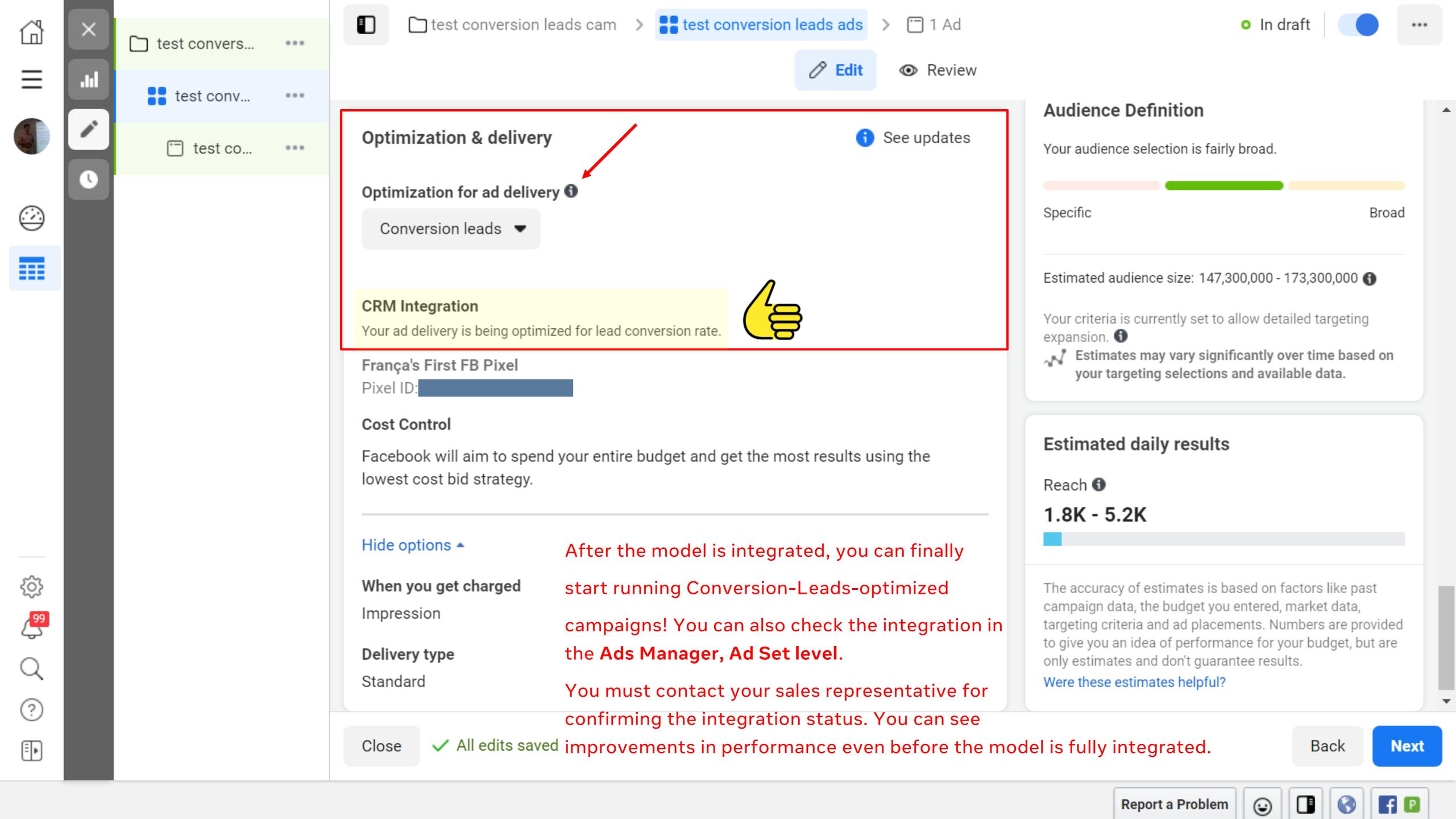
2022-04-28 07:02:28 2022-04-28 07:27:32

In-house CRM

crm\_initial\_lead

Yes





### V. Further Reference

### Useful Links

#### CREATING A (NON-EXPIRING) CAPI SYSTEM USER ACCESS TOKEN

https://developers.facebook.com/docs/marketing-api/conversions-api/get-started/#access-token

#### WEBHOOKS (FOR AUTOMATICALLY RETRIEVING LEADS)

https://developers.facebook.com/docs/marketing-api/guides/lead-ads/retrieving#webhooks

#### (FORMS API) TO CREATE FORMS AND LEAD ADS

https://developers.facebook.com/docs/marketing-api/guides/lead-ads/create/

## (more) Useful Links

#### **CRM INTEGRATION**

https://developers.facebook.com/docs/marketing-api/conversions-api/guides/crm-integration

#### **TROUBLESHOOTING**

https://developers.facebook.com/docs/marketing-api/conversions-api/support#debug

#### CRM INTEGRATION: DIRECT INTEGRATION END-TO-END WALKTHROUGH

https://go.facebookinc.com/rs/267-PVB-941/images/CRM\_Intergration\_Guide.pdf

#### LEAD ADS QUALITY CRM INTEGRATION: END-TO-END WALKTHROUGH (REV. JANUARY 2022)

https://www.facebook.com/gms\_hub/share/crm-integration-direct-integration-end-to-end-walkthrough.pdf

