

How to launch a lead generation campaign with Facebook Lead Ads

Last Updated / Reviewed: Feb 1st, 2022

Execution Time: ~1-2h



Goal: To launch a Facebook Lead Ads campaign and integrate it with your email service provider (ESP).

Ideal Outcome: Your Facebook Lead Ads campaign is collecting leads for you on autopilot and those leads are being nurtured by your email marketing workflows.

Prerequisites or requirements:

- You need a Facebook Ads Account and a Business Page. If you don't have one yet you can follow [SOP010 - Create a Facebook Ads Account using Business Manager](#).
- This SOP covers a detailed process to integrate Facebook Lead Ads with MailChimp, this chapter of the SOP assumes you already have a [MailChimp account](#). If you are using any other ESP that integrates with Zapier the process could vary slightly. You can find a list of tools that integrate with Zapier, [here](#).

Why this is important: Having a scalable, easy to setup and maintain, lead generation campaign could make or break your business.

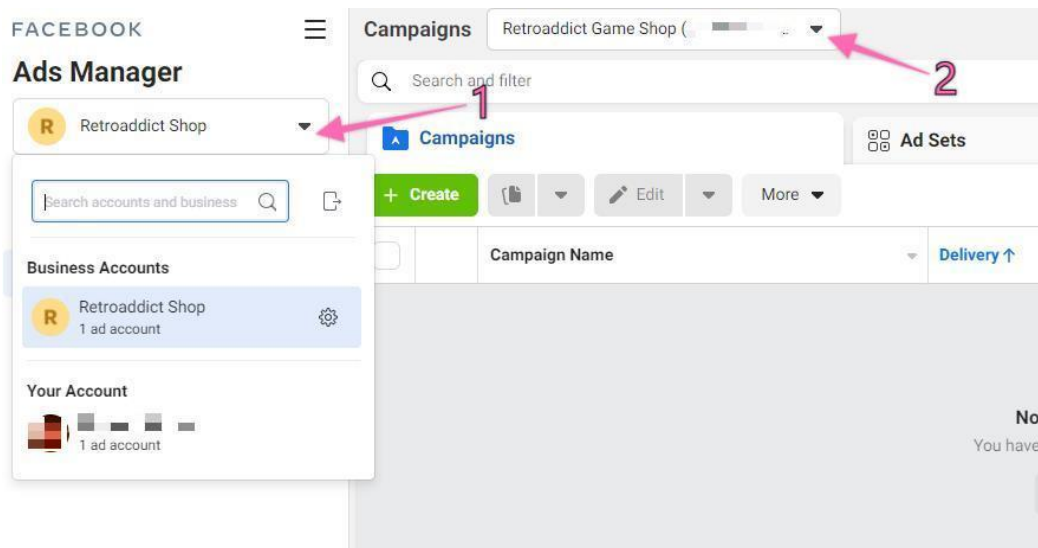
Where this is done: In Facebook Ads Manager, Business Manager, and your current ESP provider.

When this is done: Every time you want to launch a new Facebook Lead Ad campaign.

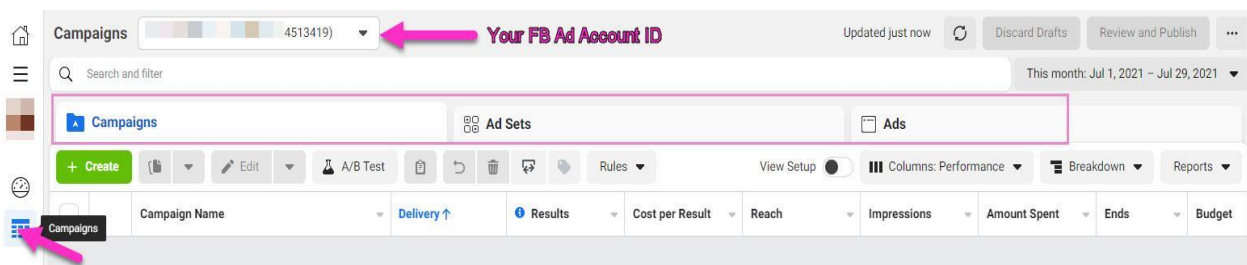
Who does this: The person responsible for Paid Advertising or Email Marketing.

□ Setting up your Campaign

1. Log into your Ads Manager guided creation panel.
2. If you're managing multiple Ad Accounts and Business Managers make sure you've selected the right ones on the top header.



Note: To prevent confusion, your FB Manager Campaign main dashboard has 3 tabs: Campaigns, Ad Sets and Ads Tab:



3. Click the '+ Create' button, under the 'Campaigns' tab:




4. Under 'Choose a Campaign Objective' → 'Consideration', select 'Lead Generation':

Create New Campaign ×

Choose a Campaign Objective
[Learn More](#)

Awareness	Consideration	Conversion
<input type="radio"/> Brand awareness	<input type="radio"/> Traffic	<input type="radio"/> Conversions
<input type="radio"/> Reach	<input type="radio"/> Engagement	<input type="radio"/> Catalog sales
	<input type="radio"/> App installs	<input type="radio"/> Store traffic
	<input type="radio"/> Video views	
	<input checked="" type="radio"/> Lead generation	
	<input type="radio"/> Messages	

Scroll down to fill up form

 **Lead generation**
Collect leads for your business or brand.

5. Scrolling down, you will need to rename your campaign according to your naming convention. In naming your 'Ad Set,' the recommended Facebook template is 'Country – Age Group – Gender – Interest'.

Note: Your naming convention will vary depending on how your Ad Account is structured.

Collect leads for your business or brand.

Name Your Campaign • Optional

Campaign
Includes the campaign objective and budget optimization.

US LeadGen Consideration 1

Ad Set
Determines your audience, placements, schedule and spending.

Create ad set ▼ US - 18-35 Men - Interested in retro games 2

Ad
Contains all ad creative settings.

Skip ad ▼ 3

Cancel Continue

6. After clicking 'Continue,' you will be redirected to your Facebook Ad Campaign dashboard. You will immediately see an error prompt ⚠ in your 'Ad Set' dashboard. Select your 'Ad Set' page, select the correct Facebook page in the dropdown, and click on 'View Terms' to accept 'Lead Ad Terms' for the Facebook

page you want to promote.

The screenshot shows the Facebook Lead Ad setup interface. On the left, a sidebar contains a list of ad sets. The first ad set, 'US - 18-35 Men - Interested in retro...', is highlighted with a pink box and a pink arrow pointing to it, labeled '1. Select FB Ad Set panel'. The main content area shows the 'Lead method' section with 'Instant Forms' selected. Below this is the 'Page' section, which has a dropdown menu showing 'Retro Games' and a pink arrow pointing to it, labeled '2. Choose Page from Dropdown'. At the bottom of the 'Page' section, there is a 'View Terms' button with a pink arrow pointing to it, labeled '3. Click View Terms'. A warning message states: 'Terms of Service Not Accepted: You can't run lead ads until your Facebook Page accepts Facebook's Lead Generation Terms of Service.' Below this is a modal box with the text 'Please read and accept Facebook's Lead Ads Terms before creating your ad for this page.' and a 'View Terms' button.

7. Read the 'Lead Ad Terms' and click 'I Agree to the Terms and Conditions' if you have no objections.

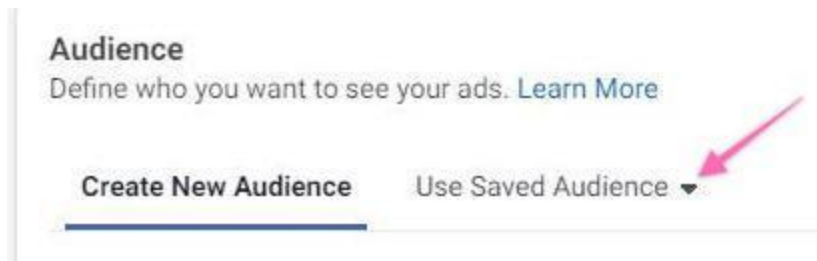
The screenshot shows the 'Lead Ad Terms' section. A pink box highlights the 'Lead Ad Terms' heading. Below the terms, there are 'Cancel' and 'I Agree to Terms and Conditions' buttons. A pink arrow points to the 'I Agree to Terms and Conditions' button.

□ Setting up your Ad Set

1. On the 'Ad Set' setup, scroll down to 'Audience':
 - a. **Note:** Your target audience will vary depending on your Ad Account structure and strategy, ideally, when setting up your ads you should already know beforehand how you want to set up your targeting, but you can also do so at this point.
 - b. **Note 2:** If you are unsure on who your target audience is, refer back to your customer avatars, and try to target their interests if you have already

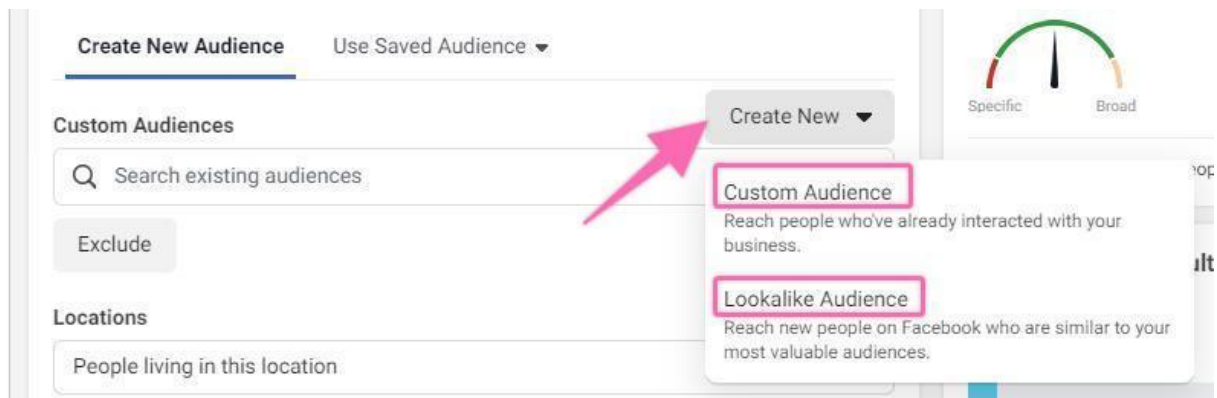
defined them.

- c. **Note 3:** If you want to use a previously built audience, you can do so by clicking 'Use a Saved Audience' dropdown.



Custom Audiences (optional): If you already have custom audiences created you can select them in the dropdown.

- **Note:** If you want to target users based on demographics, location, language, and other user-specific traits alone you can leave this blank.
- **Note 2:** If you don't have lookalike audiences and would like to create one, you can follow [SOP031 - How to create a Lookalike audience on Facebook](#);



Locations: Select the location settings that you believe will match your target audience.

Locations

People living in this location ▼

- ☐ People living in or recently in this location
People whose home or most recent location is within the selected area.
- ☒ People living in this location
People whose home is within the selected area.
- ☐ People recently in this location
People whose most recent location is within the selected area.
- ☐ People traveling in this location
People whose most recent location is within the selected area but whose home is more than 125 mi/200 km away.

Note: You can further narrow down your Audience location by searching a specific city or dropping a 'pin' in the map.

US LeadGen Consideration ...

US - 18-35 Men - Interested in retro g... ...

[Edit](#) [Review](#)

Exclude

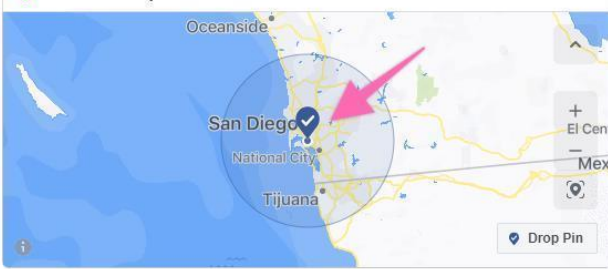
Locations

People living in this location ▼

United States

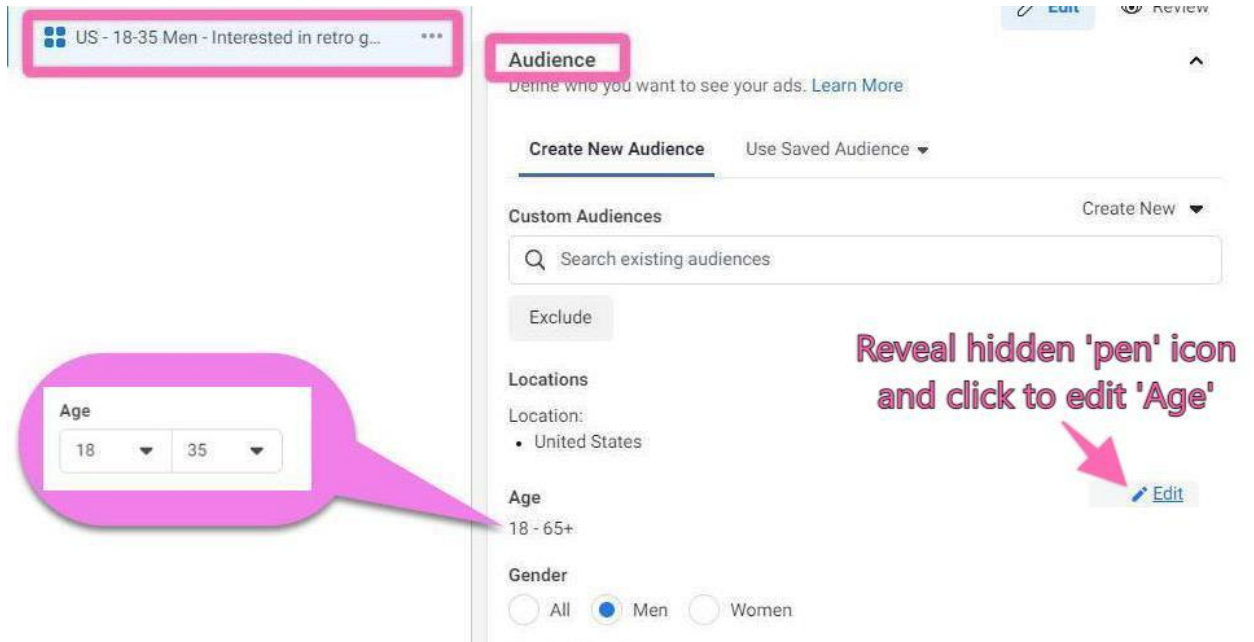
✓ San Diego, California + 25mi ▼

✓ Include Search Locations Browse

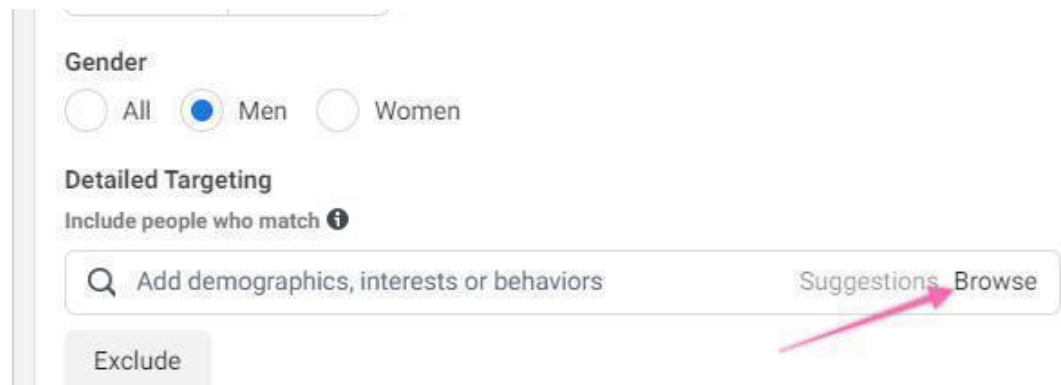


Drop Pin

Age, Gender and Languages: Select the demographics that you believe will match your target audience.



Detailed Targeting: Select the Demographics/Interests/Behaviors that you believe will match your target audience. Click 'Browse' to start selecting:



- **Note:** When selecting these, be careful not to go too broad. When selecting multiple Interests/Demographics/Behaviors Facebook will deliver your ad to anyone that matches at least one of them. If you want to target audiences that match multiple groups at the same time you can also do so, after you have selected your first group a new 'Narrow Audience' link will appear below it and will allow you to select a new demographic/interest/behavior that you want your audience to also belong to.

Detailed Targeting
Include people who match ⓘ

Interests > Additional Interests

Retrogaming

Q Add demographics, interests or behaviors Suggestions Browse

Narrow Audience

Aim at being as specific as possible while not getting overly specific.

Example: If you are advertising for a golf course, you might want to only pick “Golf” instead of just “Sports” or even tightly related sports. The exception to this case is, if your Ad Budget is too big for your audience, or if your Audience after your selections is too small.

Q Add demographics, interests or behaviors Suggestions Browse

Demographics ⓘ

Interests ⓘ

Behaviors ⓘ

Browse

- **Note 2:** You can also search demographics, interests or behaviors, by typing them in the search box:

Detailed Targeting
Include people who match ⓘ

Q retro| Suggestions Browse

Retro style Interest: ⓘ

Retrogaming Interest: ⓘ

Retro Music Interest: ⓘ

Retro Gamer Interest: ⓘ

Retro Fitness Interest: ⓘ

Size: 16,892,740

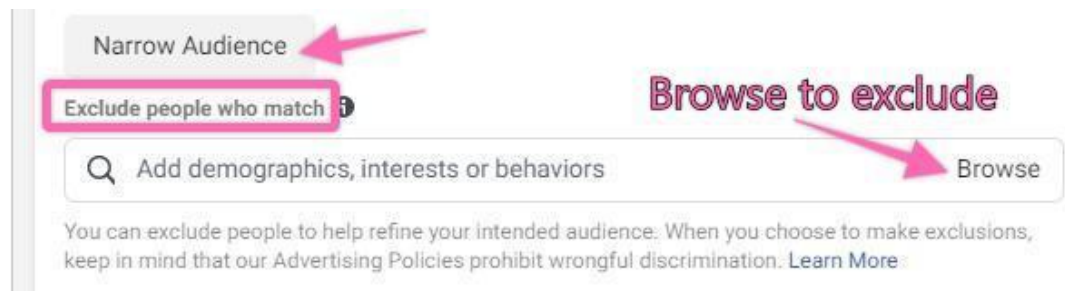
Interests > Additional Interests > Retrogaming

Description: People who have expressed an interest in or like pages related to *Retrogaming*

Estimate
Reach ⓘ

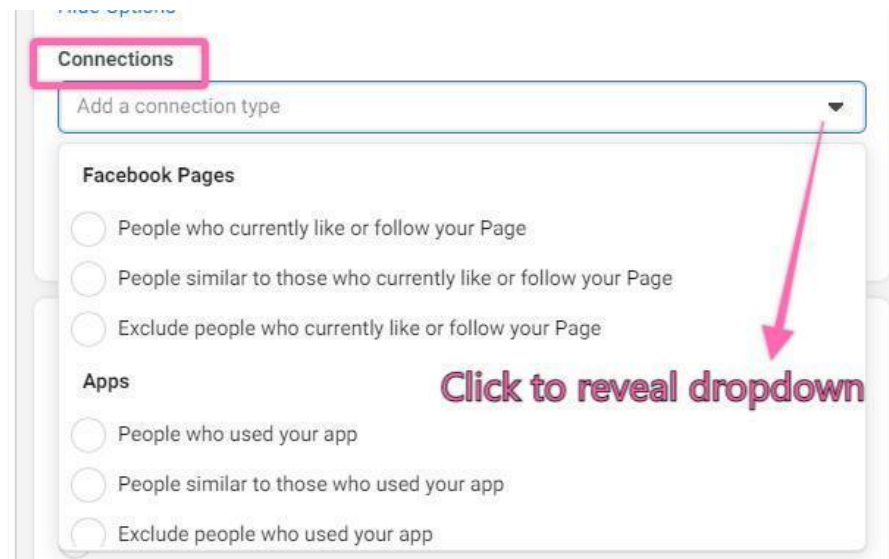
Exclude People: You can use exclusion groups if you don't want to target specific groups.

- **Example:** *you already have another Ad Set targeting that group, or you've already tested that group in the past and realized it doesn't perform well with your offer)*
- **Note:** *If you are not sure, leave blank.*

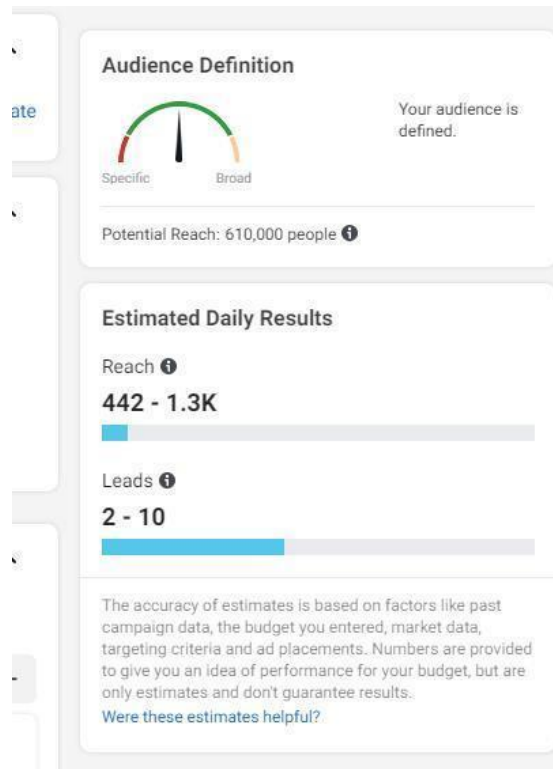


Connections: You can use this feature to reach people that have a specific kind of connection with your Page, App or Event.

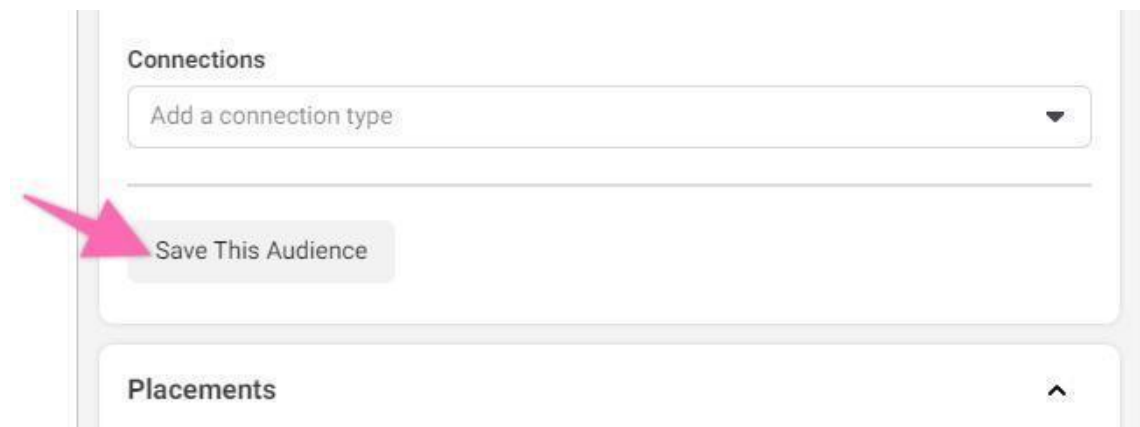
- **Note:** *If you are not sure, leave blank.*



8. Look at the right sidebar and see the 'Audience Definition', 'Reach', and 'Estimated Daily Results' if it looks good to you. If not, you can continue to adjust items in 'Detailed Targeting.'



9. If you are satisfied, click 'Save This Audience':



10. You will get to see the summary of the first 'Saved Audience' of your Facebook page. Name it according to your naming convention:

- **Note:** If you don't have a naming convention you can use [country]-[location]-[language]-[traffic type]-[age range]-[gender]-[audience type]-[audience specifics]
 - i. **Traffic type:**
 1. **Cold:** If this audience's goal is to reach people that have never heard about you.
 2. **Warm:** If this audience's goal is to reach people that have

already heard about you before and might have performed some kind of action as well before. (e.g.: left their email address)

3. **Hot:** Leads that have already committed to you in some way. (e.g.: a purchase)

Save Audience ×

Audience Name US - California - English - Cold - 18-25 - M - Interests-Retrogaming

Location - Living In: United States

Age: 18 - 35

Gender: Male

Language: English (US)

People Who Match: Interests: Retrogaming

Detailed Targeting Expansion: Off

Cancel Save

11. Select “Automatic Placements”.

Placements ^

☒ **Automatic Placements (Recommended)**
Use automatic placements to maximize your budget and help show your ads to more people. Facebook's delivery system will allocate your ad set's budget across multiple placements based on where they're likely to perform best.

☐ **Manual Placements**
Manually choose the places to show your ad. The more placements you select, the more opportunities you'll have to reach your target audience and achieve your business goals.

Hide Options Show more options

- **Note:** You can also customize Automatic Placements by clicking “Show More Options”, you might want to start doing so as you start to optimize your campaign and analyze your results. You can set ‘Brand Safety Controls’ to prevent your ads from appearing in content that’s not conducive to your brand. You can set inventory filters, block lists, content type exclusions and in-stream topic exclusion. You can click the hidden ‘Edit’ pen icon on each ‘control’ or just click ‘Brand Safety Controls’ to manage everything in the ‘Brand Safety’ dashboard.

Brand Safety

Prevent your ads from appearing within or alongside content that's not conducive to your brand. Manage in [Brand Safety Controls](#)

Inventory Filter

Facebook In-Stream Videos, Facebook Instagram Articles and Instagram IGTV :
Standard Inventory

 [Edit](#)

Block Lists

None selected

Content Type Exclusions

None selected

In-Stream Topic Exclusions

None selected

Click to edit

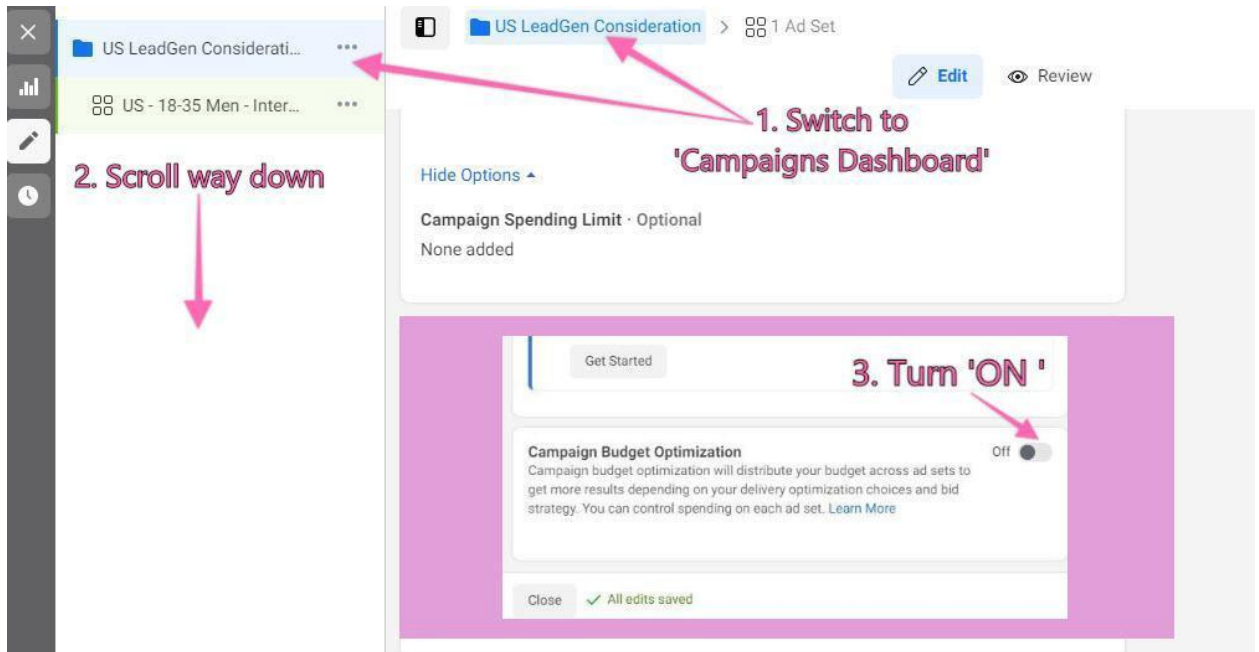
12. All changes made will be automatically saved in drafts, as indicated by the green check bottom left portion of your current dashboard.

Close

✓ All edits saved

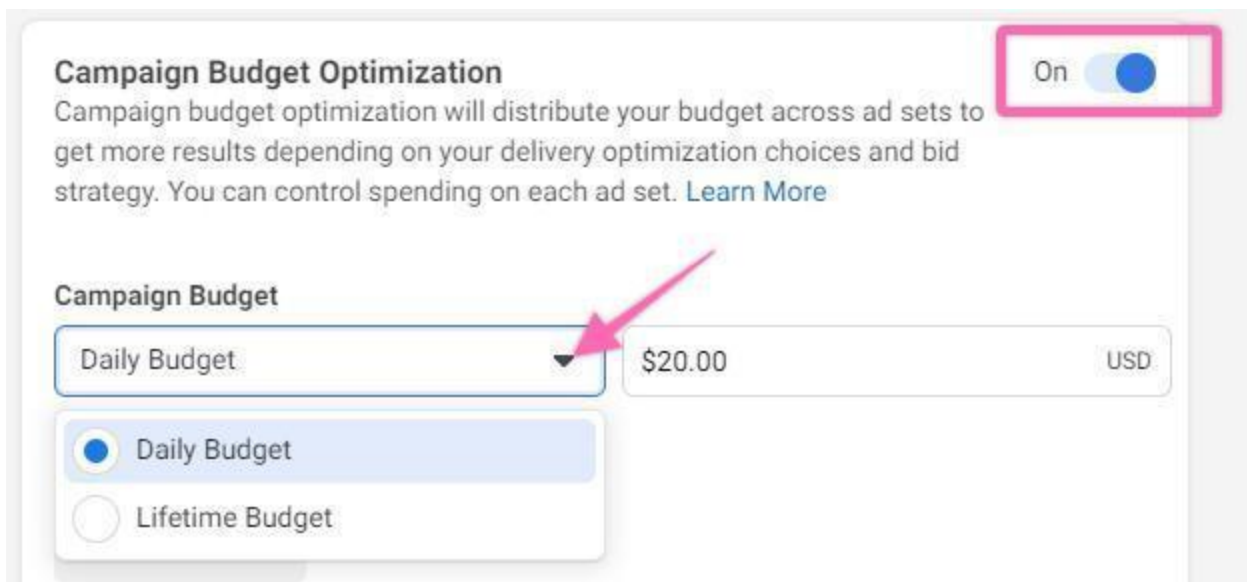
☐ Setting up your Budget, Schedule, Optimization & Delivery

1. To activate 'Budget and Schedule', you must turn 'ON' the 'Campaign Budget Optimization.' To do that, you need to switch to your 'Campaigns' dashboard, scroll way down and turn ON the switch under 'Campaign Budget Optimization' until it turns 'blue' (it is OFF by default).



2. Set up your Budget and Schedule:

■ Budget:

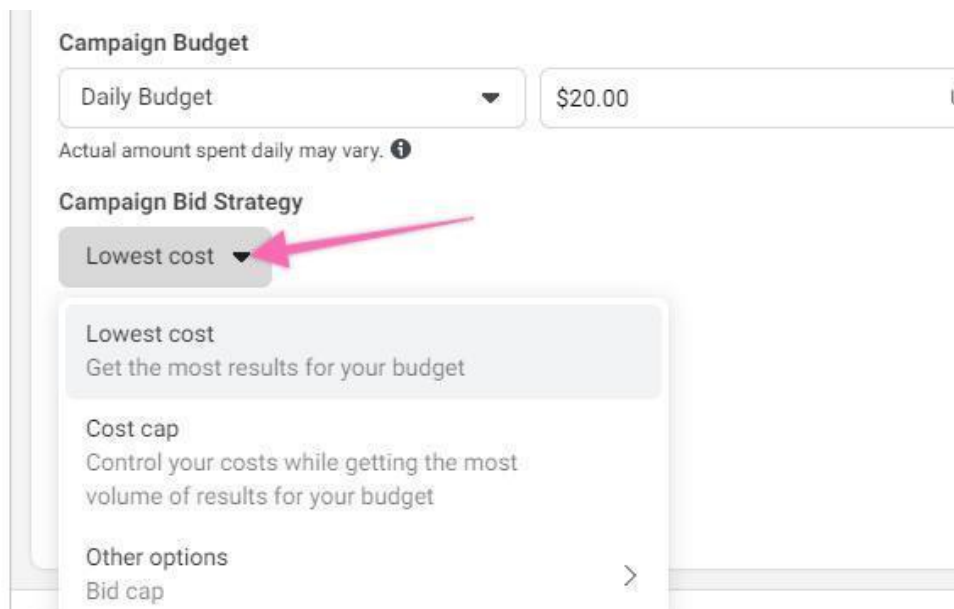


- Select “Daily Budget” if you want to have an ongoing campaign.
- Select “Lifetime Budget” if you want to limit your campaign to a specific budget instead.
 - i. **Note:** If you only have 1 campaign (which is the case if you follow this SOP from beginning to end) this will be how much you’re willing to spend on this campaign.

- ii. **Important:** You can't change this after your Ads are running; You can always duplicate your campaign, but you should avoid that if possible.
- iii. **Example:** If you want to spend \$20 per day on this Facebook Lead Ads campaign, you will have 'Daily Budget: \$20'.

■ Bid Strategy:

Note: Bid strategy options will appear based on your 'Campaign Budget' strategy and amount.



The screenshot shows the Facebook Ad campaign setup interface. Under 'Campaign Budget', the 'Daily Budget' dropdown is selected with a value of '\$20.00'. Below this, a note states 'Actual amount spent daily may vary.' Under 'Campaign Bid Strategy', the 'Lowest cost' dropdown is selected, highlighted by a pink arrow. The dropdown menu is open, showing three options: 'Lowest cost' (with the description 'Get the most results for your budget'), 'Cost cap' (with the description 'Control your costs while getting the most volume of results for your budget'), and 'Other options' (with a sub-option 'Bid cap' and a right-pointing arrow).

- You can select '**Lowest Cost**' when you want to maximize delivery and conversions from your budget. For this SOP, this is the best option because we want friend referrals in exchange for a \$20 discount coupon before a purchasing of our retro console or game.
 - '**Highest Value**' when we want to focus on high value purchases. In this case, we can use this option when we want the sale of our retro consoles to be prioritized.
 - '**Bid Cap**' when you want to set the maximum bid across auctions, rather than allowing Facebook to bid automatically. Bid cap is meant for advertisers who have a strong understanding of predicted conversion rates and can calculate the right bid.
- Ad Scheduling:
- Note:** You can only run 'Ad Scheduling' if you have chosen '[Lifetime Budget](#)' in the 'Campaign Budget' dropdown.

Campaign Budget Optimization On ☒

Campaign budget optimization will distribute your budget across ad sets to get more results depending on your delivery optimization strategy and bid strategy. You can control spending on each ad set.

Campaign Budget

Lifetime Budget USD

Campaign Bid Strategy

Lowest cost

[Hide Options](#)

Ad Scheduling

You'll set the specific schedule within each ad set.

☒ Run ads on a schedule

Important: To activate Ad Scheduling

- Put a 'check' on 'Run ads on a schedule.' Then, you need to switch to the 'Ad Sets' dashboard to set the time and day you want your ads to appear.

US LeadGen Considerati... ...

US - 18-35 Men - Inter... ...

Dynamic Creative

Provide creative elements, such as images and headlines, and we'll automatically generate combinations optimized for your audience. Variations may include different formats or templates based on one or more elements. [Learn More](#)

Budget & Schedule

Schedule

Start Date

Jul 30, 2021 Pacific Time

End

Aug 28, 2021 Pacific Time

Switch to 'Ad Sets' dashboard

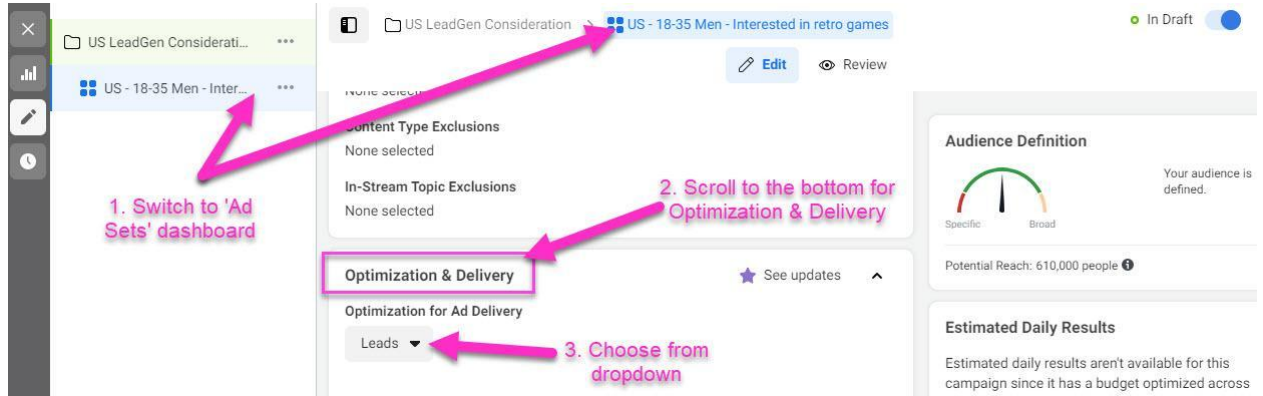
- In the 'Ad Sets' dashboard, scroll down to 'Budget & Schedule.' If you put a check mark on 'Run ads on a schedule' in the 'Campaign' dashboard, you will see an 'End' date. If you are on a [Daily Budget](#) campaign, you will just see a 'Start Date.'
- Select your start and end date.

- **E.g.:** You are collecting leads for an event that will happen in a few days and it doesn't make sense to keep your campaign going after the end date.
- Take note of errors suggested by Facebook on the right sidebar. For example, if you want to extend your ad schedule to November 2021, you will need to increase your budget.

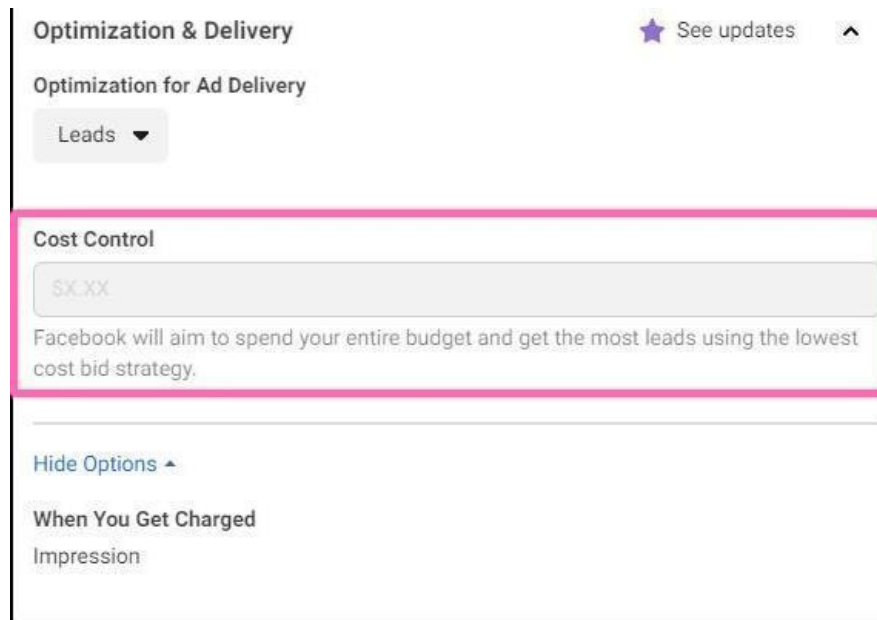
- Under 'Show More Options', you can:
 - Set Ad Spend Limits (optional)
 - Choose your Ad account time zone or the ad viewer time zone (**E.g.:** If you are setting ads for a New York audience, you might want to schedule based on their time zone).
 - Choose the time and day of the week you want your ads to appear (**E.g.:** If you do not want your ads to appear at 3 AM on a Sunday).

- **Optimization & Delivery:**

This is found scrolling on the bottom part of the 'Ad Set' dashboard. Click the Leads dropdown and choose how you want to optimize the delivery of your ad.



- For the maximum number of leads, choose **Leads**.
- For the highest quality of leads, choose **Conversion Leads**.
 - You need to install a Facebook Pixel and configure Facebook Conversion Events.
- You cannot edit 'Cost Control' if you chose the [Lowest Cost Bid Strategy](#).

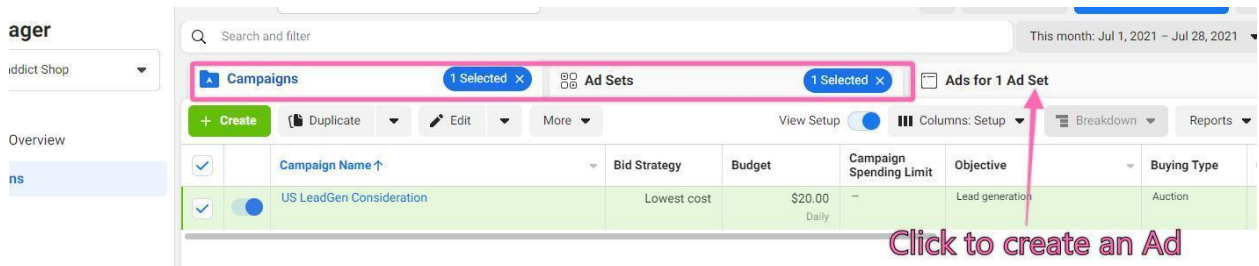


3. Make sure all the changes made are 'Saved' (automatically done by Facebook):

Close ✓ All edits saved

□ Setting up Ads

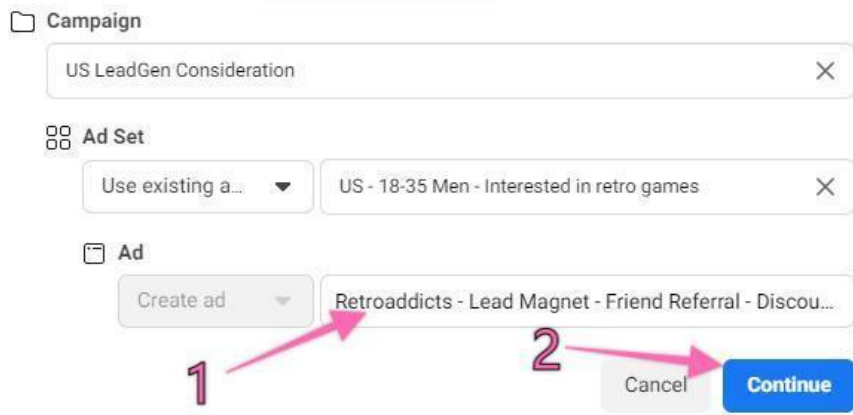
1. In the [FB Manager Campaign main dashboard](#), you will see that the 'Campaigns' and 'Ad Sets' tab have already '1 Selected' item in them. Now, we can create the actual ad that the targeted audience can see by clicking on the 'Ad' tab.



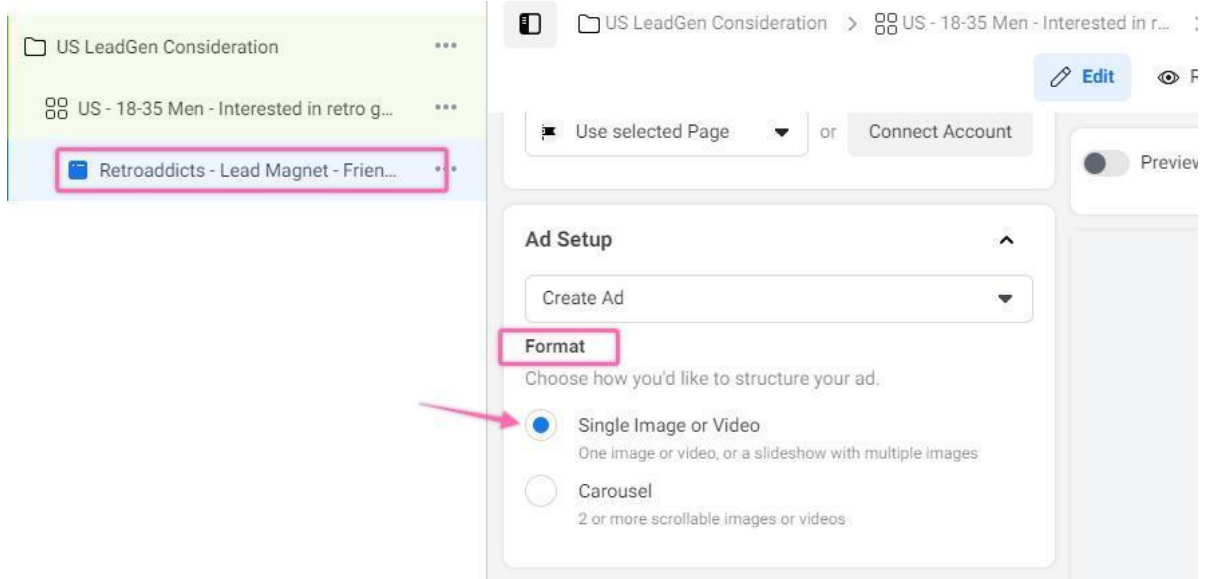
2. Click the '+ Create' button, under the 'Ads for 1 Ad Set' tab:



3. Rename your Ad name according to your naming convention (E.g.: Retroaddicts-Lead Magnet-Friend Referral-Discount Coupon) and click 'Continue'.

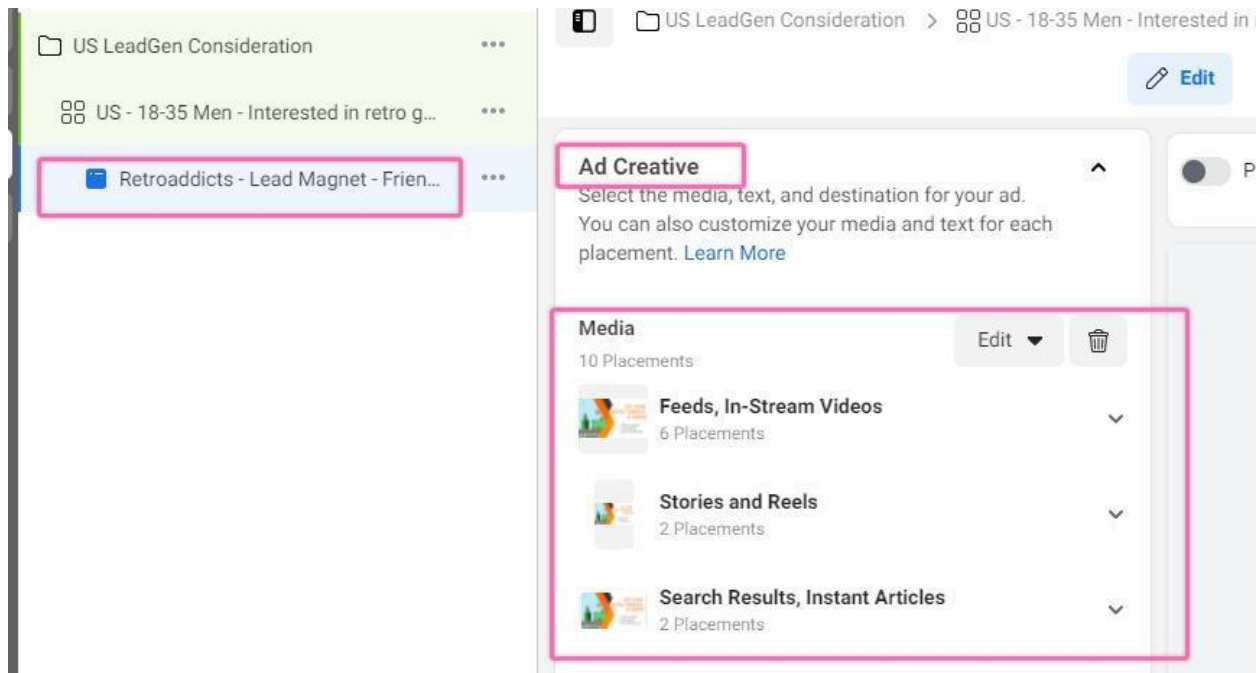


4. Although the setting for this SOP is the default ad format, you can scroll down to see that you can choose two formats: Single Image/Video & Carousel:

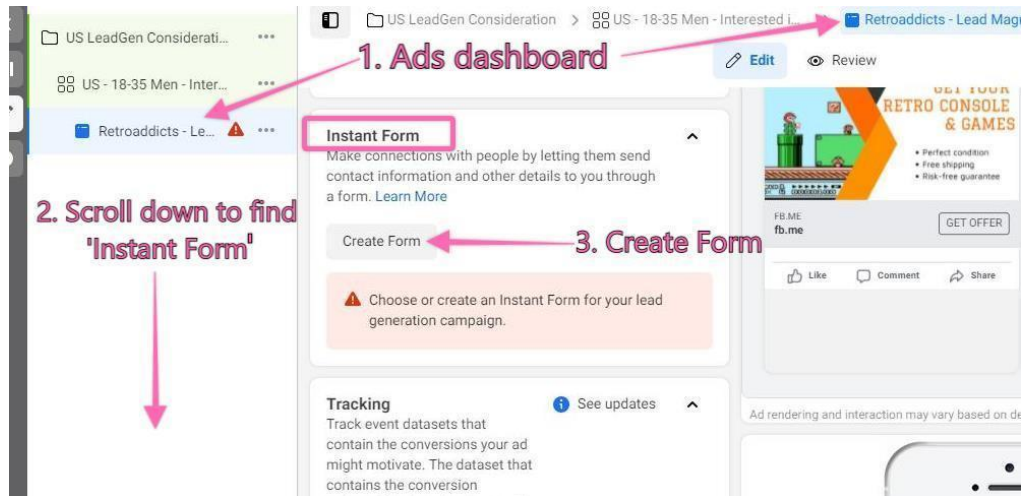


5. Also, you can set where you want your ads will appear in Facebook via Ad Creative:

- i. Feeds, In-Stream Videos (including Instagram)
- ii. Stories and Reels (including Instagram)
- iii. Search Results, Instant Articles



6. Notice the warning prompt ⚠ to create a form, since we previously set our '[Lead Ad Method](#)' to be 'Instant Forms,' which was the default setting. Scroll down to find the heading 'Instant Form,' then click 'Create Form.'



7. You can now start designing your Lead Form. Start by naming your form according to your naming convention:

Create Form

Content Settings

Form Name

Untitled form 7/30/21, 1:11 AM

Form Type

Intro

More Volume

Intro

8. Click the 'Settings' tab → Make sure you choose the right language in the dropdown, same as the audience you are targeting → Switch from 'Restricted' to 'Open' (unless you only want to enable this form to users that have specifically been targeted by Facebook Ads.)

Create Form

Content Settings

Form Configuration

Language

English (US)

Sharing

☐ Restricted - Only people who are delivered your ad directly can submit this form.

☒ Open - Your ad can be shared and anyone can submit this form.

Field Names

1

2

3

9. Go back to the 'Content' tab → Select your form type:
- **More volume** - Select this option if your sales process does not involve a lot of time-investment with each lead. This will increase the number of leads that you get but you will also get lower quality leads.
 - **Higher intent** - Select this option if your sales process requires time-investment on your end (e.g.: your sales team will call each lead individually). This option adds an extra step for users to review their submission and confirm that they want to submit it.

Create Form

Content Settings

Form Name

Lead Magnet - Friend Referral - Invite Form

Form Type

Customize your form depending on the goal of your lead generation campaign. The options you select may impact the volume of submissions and cost per lead. [Learn More](#)

☒ More Volume
Use a form that's quick to fill out and submit on a mobile device.

☐ Higher Intent
Add a review step that gives people a chance to confirm their info.

10. After 'Form Type', you will now edit 'Intro.' The default ad format is 'Single Image or Video' which you can customize back in the [Ads dashboard](#). So, if you want to have the Carousel format, you must set it back in the Ads dashboard.

Form Type

Intro

Background Image

The image you choose will show behind your form.

☒ Use the image from your ad
The image from your ad will appear with your context card

☐ Use uploaded image
Recommended image size: 1200 x 628 pixels

11. Select the 'Background Image' that you would like to use for this Ad.
- **Note:** If you want to use images that you've already used in your page (usually your banner image) as suggested by Facebook, choose 'Use

the image from your ad'. If you want to upload a new image, choose 'Use uploaded image'.

- **Note 2:** Keep in mind there are specific specs for each Ad format (E.g.: Image Ads should be 1200x628px in size, among other rules).

12. Configure your Ad Copy text.

- **Note:** Depending on the type of Ad and targeting you've selected you will have different fields available, but you can always preview how your ad is looking like on the right side of the screen.

The screenshot displays the 'Create Form' interface. On the left, the 'Content' tab is active, showing the 'Greeting' section. The 'Greeting' section is highlighted with a pink box. It includes a 'Headline' field with the text 'Refer a Friend and Get a \$20 coupon!' (36/60) and a 'Description' section with two radio buttons: 'Paragraph' (selected) and 'List'. Below the description, there are three text input fields: 'Buy our retro consoles and games!' (33/80), 'Refer 1 friend and get a 20% discount.' (38/80), and two empty fields (0/80). A 'Remove Greeting' button is at the bottom right. On the right, the 'More Volume - Form Preview' window shows a preview of the form. It features a header image with Mario and Luigi, a red circular button with a white 'R', and the text 'Refer a Friend and Get a \$20 coupon!'. Below this, there are two bullet points: 'Buy our retro consoles and games!' and 'Refer 1 friend and get a 20% discount.'.

13. Still under 'Intro', the next item is 'Greeting', where you will edit your 'Headline' and 'Description' (optional but recommended)

- **Note:** You will always be able to preview it on the right sidebar.

14. After 'Intro,' the next dropdown is 'Questions' → Select the data that you would like your leads to share with you.

Create Form

Lead Magnet-Friend Referral-Invite Form

Form Type

Intro

Questions

Custom Questions

Ask for responses to questions that matter to your business.

+ Add Question

Conti

Email

Enter

Full na

Remember: *The more information you request from your users, the less inclined they will be to submit your form.*

You can always further segment your leads once you have their contact information, either by interacting personally or by creating automated workflows that will enrich the user profile by progressively asking for more information as users consume your offers and move down the funnel.

When selecting fields and adding questions to your form ask yourself these questions:

- *Are we sure this data is going to be used in our sales process in the next 30 days?*
 - 1. *If you are not sure, do not request it. Chances are this data will never be used and you are just increasing your cost per lead by adding it.*
- *Could we get this information further down the line in the sales process without impacting our sales results?*
 - 1. *If yes, do not request it at this moment.*
- *Could this data violate any of the Facebook Advertising policies , or any data-processing legislation that I might be subject to (check your jurisdiction's data-processing law)?*
 - 1. *If the answer is 'yes', or you are in doubt do not include that field.*

E.g.: *If you are advertising a Golf course, you might feel tempted to ask users how many years they've been playing Golf for. That "might" be something that you "might" use in the future. But that is*

not something that you necessarily need to know the moment you are just getting to know your lead and that is something that you can ask your lead later either personally or through your marketing funnel.

Custom Questions: In this section you can add any fields that are specific to your business or offer and are not on the 'User information' section.

The screenshot displays a form builder interface. On the left, the 'Content' tab is active, showing the 'Form Name' as 'Lead Magnet-Friend Referral-Invite Form'. Below this, the 'Form Type' and 'Intro' sections are visible. The 'Questions' section is expanded, showing a 'Custom Questions' box with the text 'Refer your friend's email to get \$20 discount coupon'. A pink box highlights this question, and a pink arrow points from it to the 'Form Preview' on the right. The 'Form Preview' shows a 'More Volume - Form Preview' with a 'Custom Questions' section. It features a 'Refer a Friend and Get a \$20 coupon!' banner and a list of bullet points: 'Buy our retro consoles and games!' and 'Refer 1 friend and get a 20% discount.' Below this, a pink box highlights the question 'Refer your friend's email to get \$20 discount coupon' with an 'Enter your answer.' field. A pink arrow points from the 'Add Question' button in the 'Custom Questions' section to the 'Form Preview'.

Note: You have multiple options when designing your 'Custom Questions'. As a general rule of thumb, you will want to standardize your responses as much as possible. You can do it by using the 'Multiple Choice', 'Conditional' and 'Appointment Scheduling' options, instead of 'Short Answer'.

E.g.: If you are going to ask your user for how they would rank their Golf skills you might want to have a 'Multiple Choice' field with 'Never tried it', 'Amateur', 'Hobbyist', 'Pro', instead of having it as an open-field. This will not only make it easier for your leads to fill out the form, but it will also allow you to analyze your results and use them on your automation workflows more easily.

Custom Questions

Ask for responses to questions that matter to your business.

Refer your friend's email to get \$20 discount coupon

Short Answer

+ Add Question

- Multiple Choice
- Short Answer
- Conditional
- Appointment Request

Prefill Questions: This is where you configure user information.

Description: You can explain why you want their contact information.

User Information: Any field that you select in this section will be prefilled with the user's personal profile data making it much more likely for them to submit your form since they don't need to fill out those fields themselves.

Content Settings

Prefill Questions

Ask for user information. This will be prefilled from their Facebook account.

Description

Let people know how the information they give you will be used or shared. [See Examples](#)

Where do we send your \$20 coupon?

Choose the type of information you need

- Full name
- Email

+ Add Category

More Volume - Form Preview

Prefill Information 2 of 4

REFERRAL GET \$20

Contact Information

Where do we send your \$20 coupon?

Full name

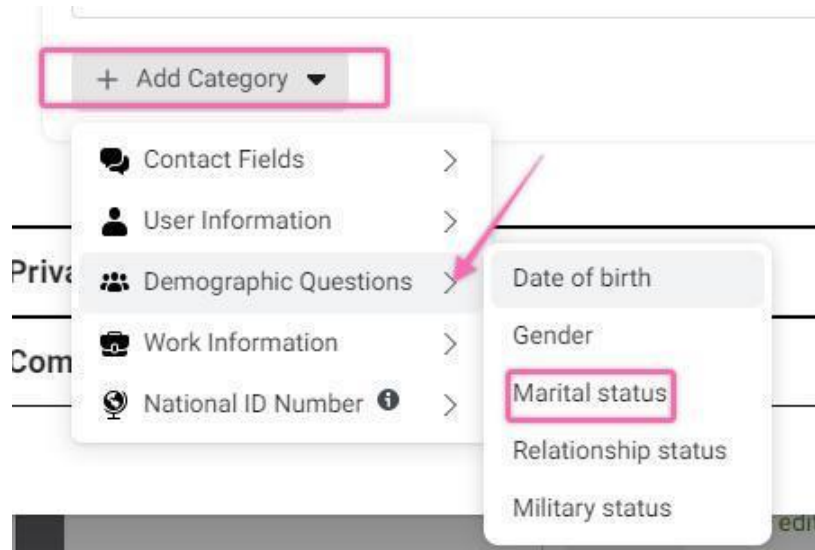
Enter your answer.

Email

Enter your answer.

Important: If you are going to 'Add a Category', make sure that data (or very similar) isn't already available on the "User Information" section. If it already exists, do not create a custom question for it. Doing so would be a violation of the Advertising Policies, which can lead to a permanent suspension of your account.

E.g.: There is already a 'Marital Status' field under the User Information section. You should not create a 'Are you married?' custom question.



15. After 'Questions' is 'Privacy Policy' → Select the data that you would like your leads to share with you.

Create Form

Content Settings

Questions

Privacy

Privacy Policy

Because you will be collecting customer information, you need to include a link to your company's privacy policy. Your link will appear with Facebook's default privacy disclaimer.

Link

Link Text

27/70

Custom Disclaimer

You can add additional notices like marketing opt-ins and legal disclaimers to the default Facebook privacy disclaimer.

+ Add Custom Disclaimer

More Volume - Form Preview

Privacy Review 3 of 4

Privacy Policy

By clicking Submit, you agree to send your info to Retro Games who agrees to use it according to their privacy policy. Facebook will also use it subject to our Data Policy, including to auto-fill forms for ads. [View Facebook Data Policy](#), [Retroaddicts Privacy Policy](#)

Note: Make sure your Privacy Policy is up-to-date, transparent, and identifies all data-processing/data-usage terms.

Note 2: If adding a link to your privacy policy is not enough in your jurisdiction, you will want to check “Add a custom disclaimer”. Bear in mind this will add one more step to your form.

The image shows two parts of the Facebook form builder interface. On the left is the 'Custom Disclaimer' configuration panel, which is highlighted with a pink border. It includes a 'Link Text' field at the top with the value 'Retroaddicts Privacy Policy' and a character count of 27/70. Below this is the 'Custom Disclaimer' section, which explains that additional notices like marketing opt-ins and legal disclaimers can be added. It contains a 'Title' field with 'Terms and Conditions for Retro Games' (0/60 characters) and a 'Text' field with 'Add disclaimer (Required)'. At the bottom of this section is a '+ Add new consent' button. A 'Remove Disclaimer' button with a trash icon is located at the bottom right of the configuration panel. On the right is a 'Privacy Review' preview window. It shows a header image with Mario and Yoshi, followed by the text 'REFER A & GE' and 'Terms and Conditions for Retro Games'. Below this is a paragraph of text: 'By clicking Submit, you agree to info to Retro Games who agrees according to their privacy policy, will also use it subject to our Data including to auto-fill forms for ac Facebook Data Policy, Retroaddi Policy'.

16. The last dropdown under ‘Create a Form’ is ‘Completion,’ which is essentially a ‘thank you’ screen → Configure the message that you want your user to see once they’ve submitted your form and where you want the CTA (Call-to-action) to link to.
- **Note:** If you are using a lead magnet (an offer in exchange for the user’s contact details), you might want to link to your offer at this point. If your form is a contact form, you might want to let the users know what to expect (when will you reach out to them, what are the next steps, how can they learn more about you meanwhile, etc.).
 - **Note 2:** If you are linking to a page on your website, and you are using Google Analytics, it’s recommended that you use UTM tags on your URLs.

Create Form

Completion

Message for Leads
Let people who submit their information know what to expect next.

Headline
Thank you! Your \$20 coupon is on its way! 41/60

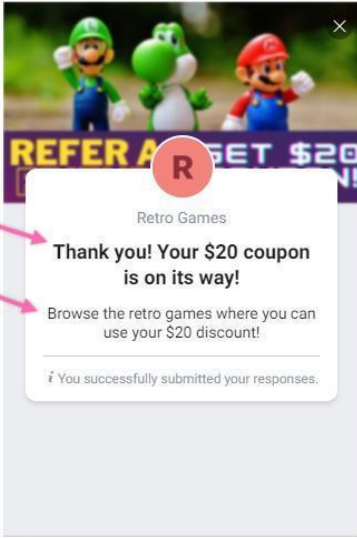
Description
Browse the retro games where you can use your \$20 discount!

Call-To-Action Button
View Website

Call-To-Action Text
View Page 9/60

Link
<http://www.retroaddicts.com/product-category/games/>

Message for Leads 4 of 4



Retro Games

Thank you! Your \$20 coupon is on its way!


Browse the retro games where you can use your \$20 discount!

i You successfully submitted your responses.

View Page

17. Preview your Ad by using the sidebar on the right, and make sure everything looks OK:

Prefill Information 2 of 4



es

Get a \$20

!

s and games!

a 20%

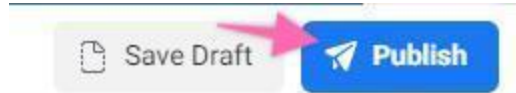
nail to get

Contact Information
Where do we send your \$20
Full name
Enter your answer.
Email
Enter your answer.

Next

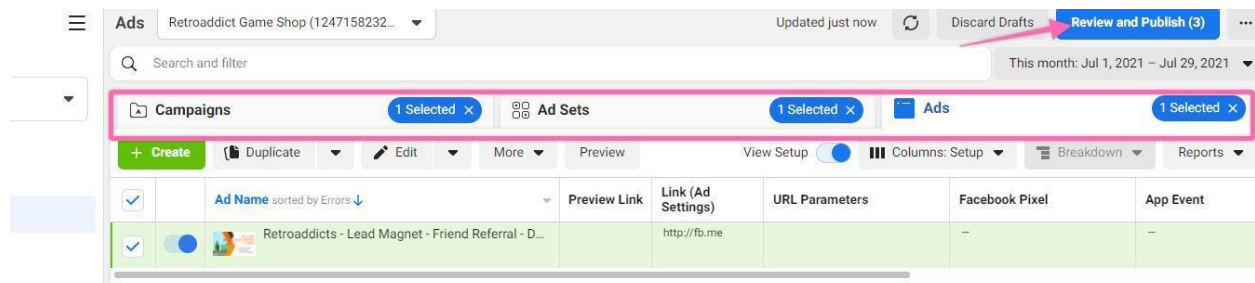
18. If everything looks OK, click 'Publish' (under the Ad preview) to publish your form.

- **Important:** You will not be able to edit your form after you click 'Publish'. You can always duplicate it and create a new one if you want, though.



□ Activate your FB lead generation campaign

1. Back in the [FB Manager Campaign main dashboard](#), you will see that ALL the 'Campaigns', 'Ad Sets' and 'Ads' tabs have already '1 Selected' items in them. Click the 'Review & Publish' button.



2. You will be able to review ALL the changes you've made (Draft items). If everything looks good, finally click 'Publish'.



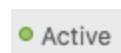
By clicking the "Publish" button, you agree to Facebook's Terms and Advertising Guidelines.



3. That's it! Your campaign is now being reviewed.



- Note: It may take between 5 min - 48h for your ads to start delivering, when they do, you'll see an "Active" message instead:



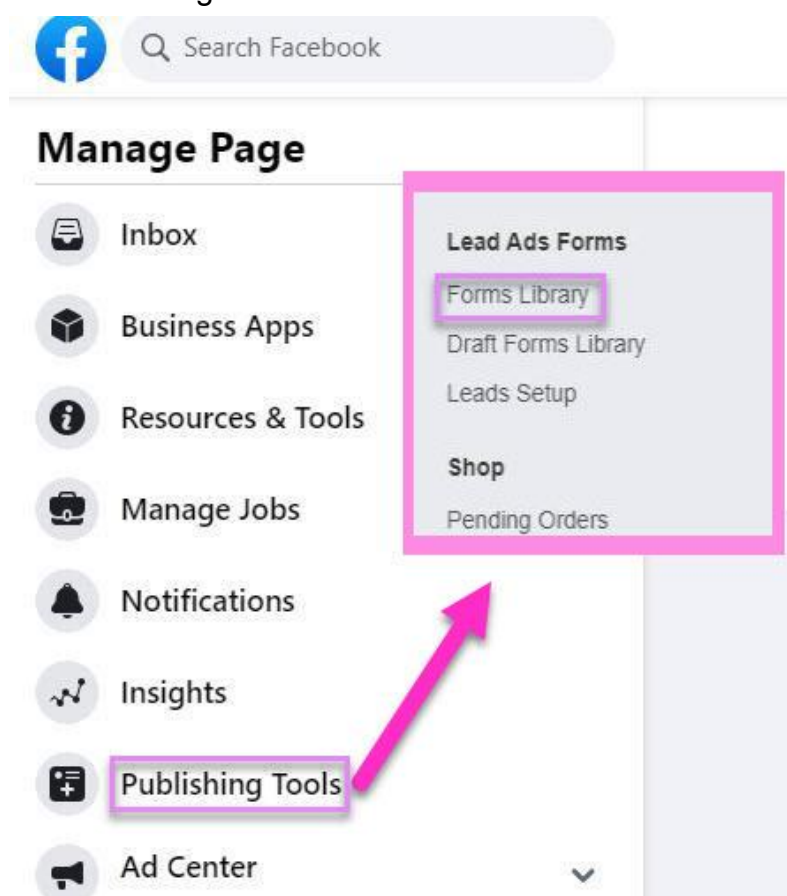
❑ Exporting your leads from Facebook Lead Ads

Note: Make sure you have Admin access to the company's Facebook Page before starting this chapter, otherwise you won't be able to download your leads. Alternatively, you can request your Admin to enable the 'Lead Access Manager' and give you access through that panel.

1. On Facebook, open your Facebook Page.

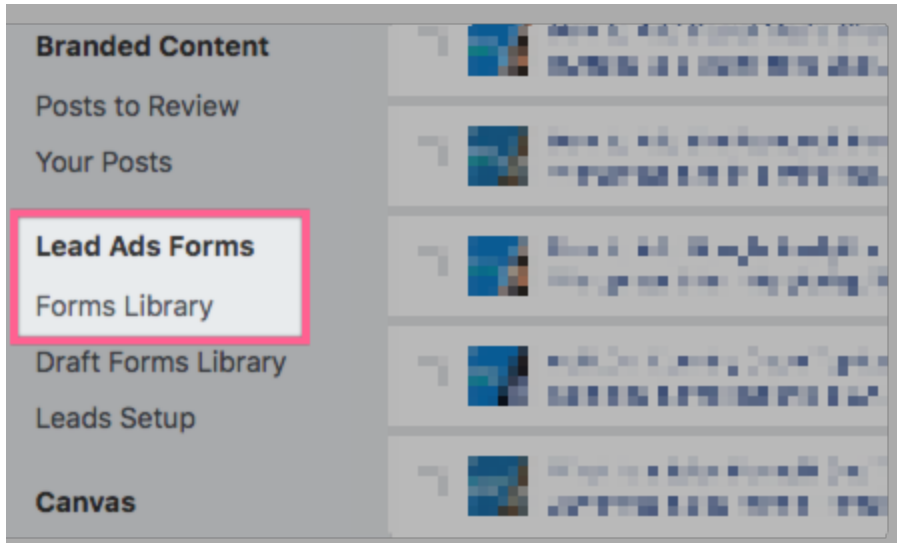
E.g.: https://www.facebook.com/your_facebook_page/

2. Click 'Publishing Tools' found on the sidebar.



3. Click 'Forms Library' under 'Lead Ad Forms' on the sidebar.
4. Locate your form and click "Download".

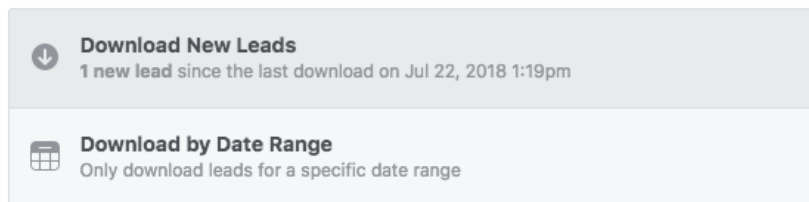
Name	Status	Created	Leads Count	Sharing	Leads
Lead Magnet - Download - Emoji Cheatsh... (Preview)	Active	Jul 22, 2018 ... André Nunes...	1 0 expired	Open	Download



5. Click 'Download New Leads' to download a list of your new leads or select 'Download by Date Range' if you want to download all leads that occurred on a given period.

- a. **Important:** Leads will only be available for download for up to 90 days from the time they are submitted by a user.

Choose how you want to download your leads.



6. Select which format you prefer:
 - a. **Note:** If you are going to upload this list to another SAAS tool, CSV is typically the universal option. If you are only going to use it in a software like "Excel", XLS might be more convenient.

Form	Leads Count	Download Link	
Lead Magnet - Download - Emoji Cheatsheet	1	CSV	XLS

7. That's it, you've successfully downloaded your leads. If you use an email marketing tool you can now import those leads to your list and use them in your email marketing workflows. If you are using MailChimp, or if your tool integrates with Zapier, you can also follow the next chapter of this SOP below.

- a. **Important:** Don't forget to do this at least every 90 days or you might lose some of your leads.

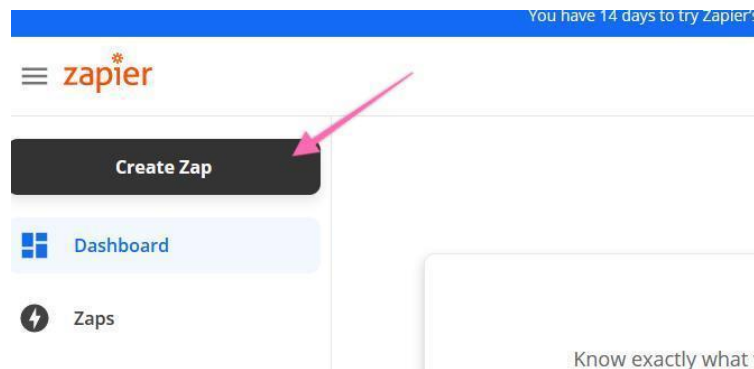
	I	J	K	L	M	N	O
1	form_id	form_name	is_organic	what_is_your_goal_for_2	email	full_name	gender
2	1877878	Lead Magnet - Download - E	true	start_a_business	emoji@asiteaboutemojis.com	Mr. Emoji	male
3							
4							
5							
6							
7							

❑ Using Zapier to send your leads to Mailchimp

Note: To follow this chapter, you should already have a Zapier account and be subscribed to a paid plan.

Note 2: Depending on which CRM / Email Marketing tool you are using, you might not need to use Zapier since a direct integration might be available. If you don't find your tool here, try contacting your tool's support directly.

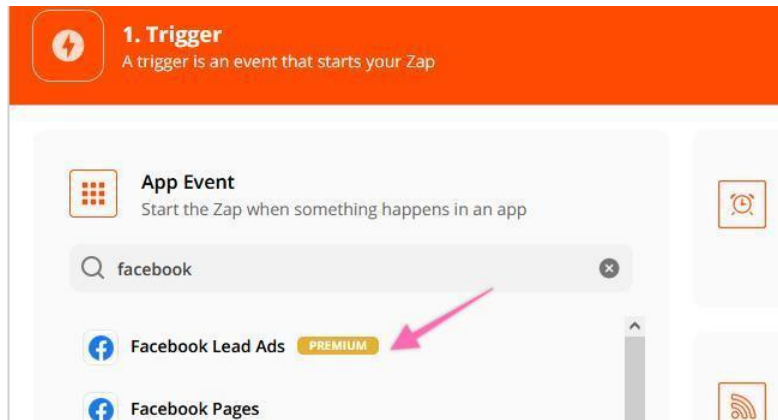
1. Log into your Zapier account.
2. Click "Make a Zap" on the top left sidebar:



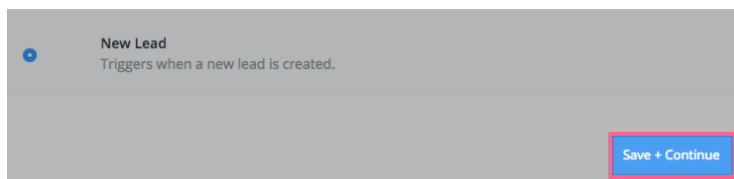
3. Rename your Zap according to your naming convention.



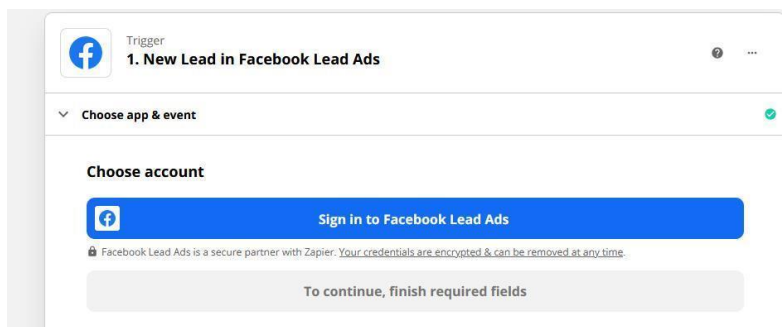
4. Search for "Facebook Lead Ads" (you should see a "Premium" tag on it) and click on that result.



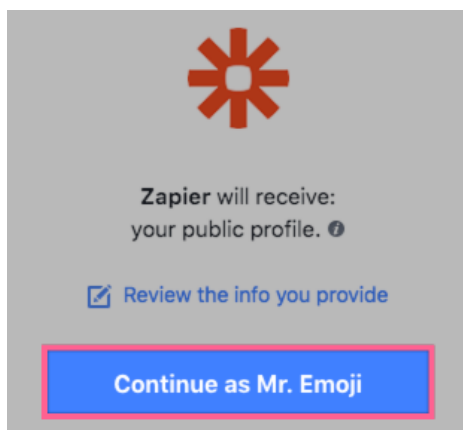
5. Select “New Lead” as the trigger, and click ‘Save + Continue’



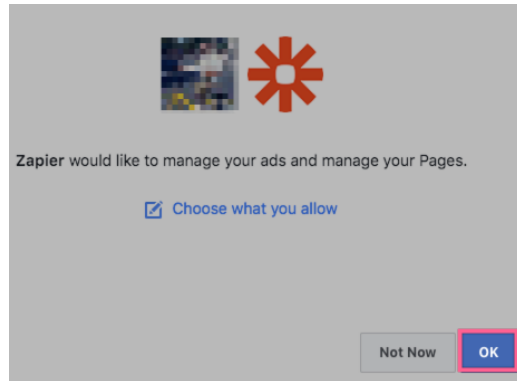
6. Click ‘Sign in to Facebook Lead Ads’



7. Click ‘Continue as (...)’



8. Click ‘OK’



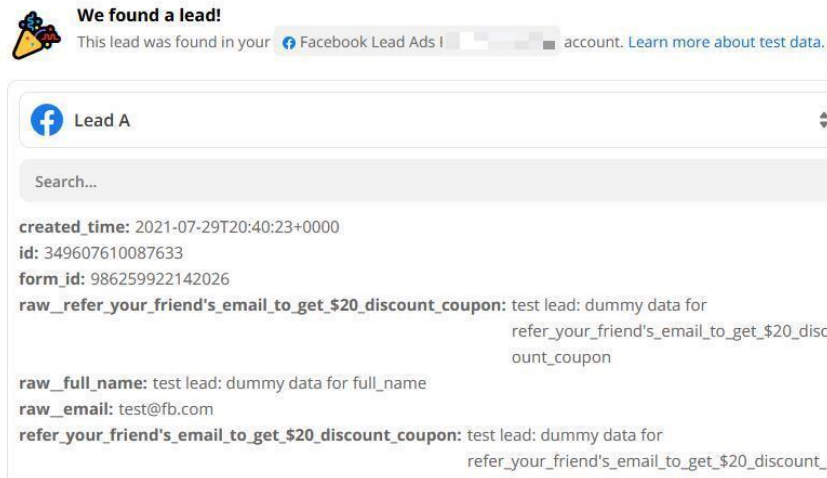
9. Click 'Continue':
10. Under 'Set up Trigger,' Select the Facebook Page where your Form belongs to
→ Select your form from the dropdown → Click 'Continue'.

A screenshot of the "Set up trigger" form in Zapier. The form has two main sections: "Page" and "Form". The "Page" section has a dropdown menu with "Retro Games" selected, and it is marked as "(required)". Below this, there is a note: "Don't see your Page listed? Access your Business account's Settings to confirm the connected account has correct 'Manage Page' permissions and re-connect your account. See help docs for more info." The "Form" section has a dropdown menu with "Lead Magnet-Friend Referral-Invite Form" selected. Below this, there is a note: "If your sample in the next step doesn't include custom form fields, try selecting a specific form in the field above or following these steps to create a new test lead." At the bottom of the form, there is a "Refresh fields" button and a large blue "Continue" button. A red arrow points to the "Continue" button.

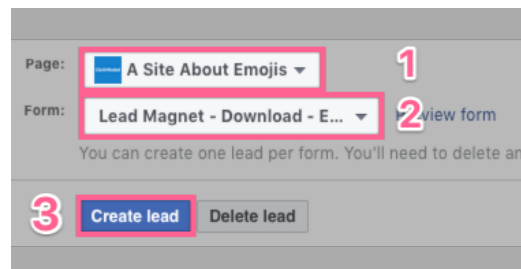
11. Click 'Test Trigger' and Zapier will test your Facebook lead ad form if it works.

A screenshot of the "Test trigger" form in Zapier. At the top, there is a diagram showing a Facebook icon connected to a Zapier icon. Below this, the text reads "Test your trigger". Then, it says "We'll find a recent lead in your Facebook Lead Ads account". Below that, there is a note: "Facebook Lead Ads [icon] to confirm that the right account is connected and your trigger is set up correctly." At the bottom, there is a blue "Test trigger" button. A red arrow points to the "Test trigger" button.

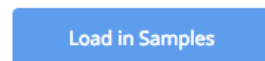
Test trigger



- a. If you can't see any test data, you might need to generate it via Facebook. On a new tab, go to 'Facebook Lead Ads Testing' tool.



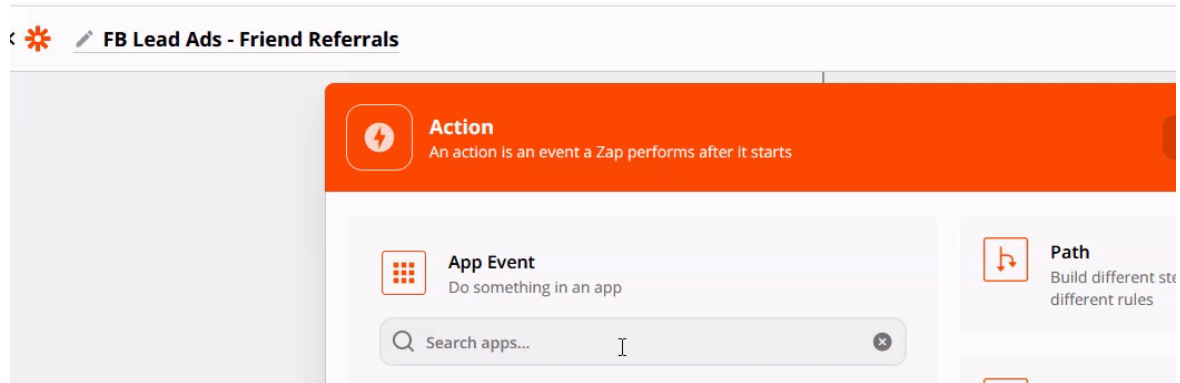
- b. Go back to Zapier and click "Load in Samples":



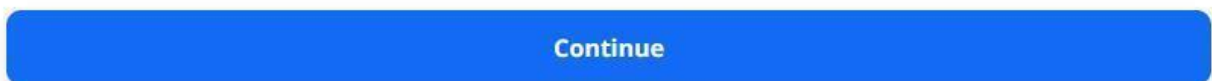
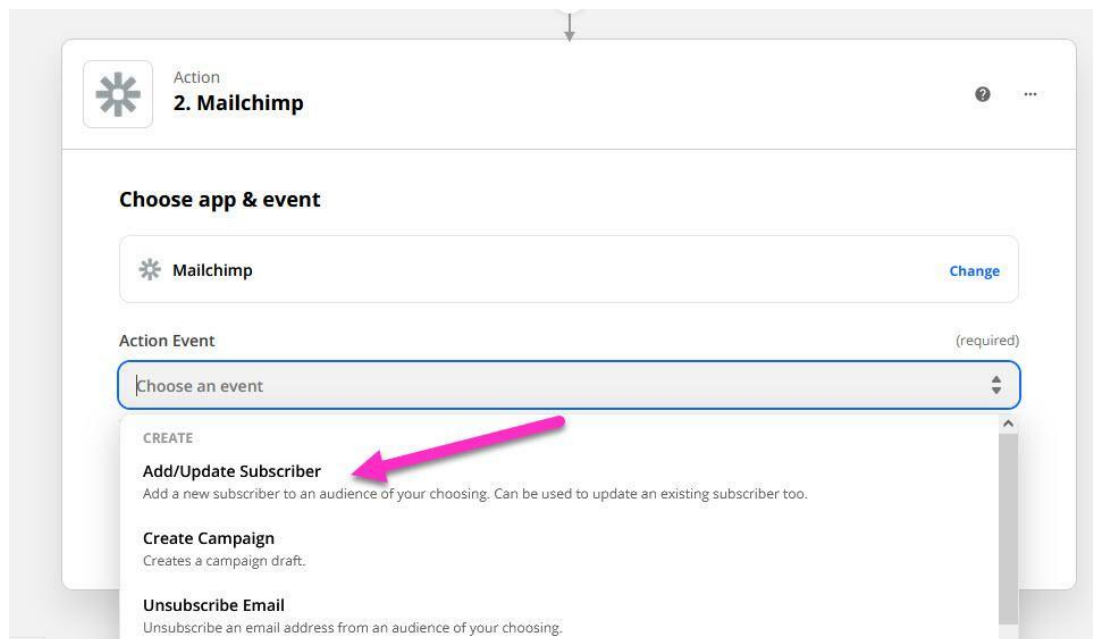
- c. You should be able to see a Lead appear in the next screen. Click 'Continue'

12. Add an 'Action' to your Zap, search for 'Mailchimp.'


- a. **Note:** If you use any other Email Marketing / CRM tool, you can select your tool here alternatively. The next steps might vary slightly for other platforms.





13. Select 'Add/Update Subscriber' then 'Continue.'




14. Connect your MailChimp Account by clicking 'Sign in to Mailchimp' and then log in with your Mailchimp credentials:




Action
2. Add/Update Subscriber in Mailchimp






Choose app & event

Choose account



Sign in to Mailchimp


Mailchimp is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

To continue, finish required fields

Note: If you have multiple accounts make sure you select the account you want your emails to be sent from.

Select an account.

Huge Emoji Business

>

A Site About Emojis

>

We Sell Emojis


>

15. You will see a list of properties that are available on the MailChimp list you've selected, map each of the properties to your FB Lead Ads property.

a. **E.g:** "Subscriber Email" → "Email"


Set up action

Audience


retroaddicts

(required)


Subscriber Email


1. Email: test@fb.com

(required)


The email address of the subscriber you want to subscribe to this audience. Please don't type an email address in this field, instead this should use a value from a previous step in your Zap. [Learn more here.](#)

Double Opt-In


True

If yes, a confirmation email will be sent to the address before they appear on the chosen audience.

Update Existing




Yes

If yes, the Zap will update the data even if the subscriber exists. [Learn more here.](#)

16. Once you've mapped all the fields, click 'Click 'Test & Continue.'


Test action

[Skip Test](#)

 >  **Send Subscriber to Mailchimp**
To test Mailchimp, we need to create a new subscriber. This is what will be created:

Search subscriber data...

Audience: retroaddicts
Subscriber Email: test@fb.com
Double Opt-In: True
Update Existing: yes
Replace Groups:
Groups:
Language Code:
Tag(s):
First Name:
Last Name:

☐ 

17. You will see a 'Test was successful' message. Then click on 'Turn on Zap.'

Test action

 ✓  **Test was successful!**
We'll use this as a sample for setting up the rest of your Zap.

 A subscriber was sent to Mailchimp about 20 seconds ago.

18. On a new tab, open your MailChimp list, you should be able to see a new lead in there with the data you've just configured in Zapier:

Email Address		First Name
<input type="checkbox"/>	test@fb.com	> test lead: dummy data for full_name

19. Go back to your Zapier tab again, if everything looks good, click 'Turn on Zap.'

Turn on Zap

20. **That's it!** You've successfully integrated FB Lead Ads with MailChimp. Whenever a new lead submits your Lead Ads form, that lead will be sent to your MailChimp list.

Home

▼

Trash

Create Zap



▶



INSTANT FB Lead Ads - Friend Referrals

ON



