Beginner's Step-By-Step Guide: Running Meta (Facebook) Lead Ads via Your Website

Launching Meta lead generation ads may seem daunting, but this guide will walk you through every step in plain language. We'll cover setting up your Meta business tools, creating an effective lead-generation campaign, and leveraging Custom and Lookalike Audiences in your advertising efforts. Follow along step-by-step, and you'll be ready to launch and optimize your first Meta lead ad campaign in no time.

Section 1: Setup

In this section, you'll create and configure all the foundational assets needed to run Meta ads. This includes setting up a Meta Business account (portfolio), adding your Facebook Page, creating an Ad Account, and setting up the Meta Pixel for tracking leads on your website. By the end of Section 1, you will have your business owner account set as admin on all assets, the Pixel installed on your site (with a "Lead" event to track form submissions), and verification that the Pixel is working correctly.

Step 1: Create a Meta Business Account (Business Portfolio)

Meta's Business Account (formerly "Business Manager", now often called **Meta Business Suite**) is your advertising hub. You'll log in with your personal Facebook credentials, but it keeps business assets separate from your profile. To create one:

1. **Go to Meta Business Suite:** Visit **business.facebook.com** and click **Create Account**. (Make sure you're logged into the Facebook profile you want to use as the admin.)[1]
2. **Enter Business Details:** Provide your **business name**, your **name**, and a **business email**.[1] Use an email you check regularly – you'll need to verify it via a confirmation link Facebook sends[1].
3. **Verify Email:** Check your inbox and click the verification link. This step is required before you can fully use the Business account[1]. Once verified, your Meta Business account (portfolio) is active.

Why this matters: A Business Account lets you manage your Page, ad accounts, and Pixel in one place. It's also essential if you plan to run ads regularly or with a team[2][3]. After setup, you'll use Business Settings to organize assets and permissions.

Step 2: Add Your Facebook Business Page to the Business Account

Next, connect your Facebook Business Page (the public page for your business) to this Business Account. This allows your page to serve as the identity in ads. In **Business Settings** (found in the left menu of Business Suite):

1. In Business Settings, under **Accounts**, click **Pages**, then click **+ Add**.[4][5]

2. Choose **Add a Page** (if you already have a Page) and type your Page name or URL. Select your page from the results and click **Add Page**[5]. (If you are the Page owner/admin, it will be added instantly. If someone else owns the page, you'll need to request access.)
3. If you **don't have a Page yet**, you can choose **Create a New Page** instead and follow the prompts to set one up[6]. Use the **Business or Brand** category for a company page.

After adding, you should see your Page listed in Business Settings in the Pages section. This allows your Business Account (and anyone you grant access) to manage and run ads with that Page.

Step 3: Create a Meta Ad Account in Business Settings

An **Ad Account** is where your campaigns, billing, and ad budgets live. You need at least one Ad Account to run ads. To create one:

1. In Business Settings, under **Accounts**, select **Ad Accounts**, then click **+ Add**.[7]
2. Choose **Create a New Ad Account**[8]. If prompted for options like "Add an Ad Account" or "Request Access," select **Create New** (since we are setting up from scratch).
3. Enter an **Ad Account Name**, select your **time zone** and **currency**.[8] (Double-check these; you cannot change currency or time zone later.)
4. When asked "Who will this ad account be used for?", choose **My business** (if this is for your own business)[9]. Click **Create**.
5. On the next screen, **assign yourself (the business owner/admin)** to the ad account with full control if not already auto-assigned. Simply check your name and ensure "Admin" toggle is switched on, then click **Assign**.

Your new Ad Account will appear in Business Settings. It's a best practice to also add a **payment method** now so you're ready to advertise. To do this, go to **Billing** or **Payment Settings** in your Business Portfolio and add a credit/debit card or other payment method. (Having payment set up in advance prevents delays when launching ads[10].)

Note: If you already had an ad account you were using from your personal profile, you can instead **Add an Ad Account** by ID or request access, but creating a dedicated one for the business is recommended for a clean setup.

Step 4: Create a Meta Pixel for Website Tracking

The **Meta Pixel** is a small snippet of code for your website that tracks visitor actions. It's crucial for lead generation campaigns because it will track when someone who clicks your ad opts in and **becomes a lead on your site**. This also helps the Meta ads algorithm optimize ads to find more people who are likely to click and become your lead. To create a Pixel:

1. In Business Settings, under **Data Sources**, click **Pixels**, then click **+ Add**.[11]

2. Enter a name for your Pixel (e.g., *“<YourBusiness> Pixel”*)[12]. You do not need to enter the optional website URL. Click **Continue**.
3. You’ll be prompted with installation options. Choose **“Manually add pixel code to website.”**[13] (We will install it ourselves with help from Buildy in a later step.)
4. The Pixel **base code** will be shown. **Copy** the entire code snippet to your clipboard[13] – we’ll add this to your site soon. Click **Continue** and you can skip the automatic event setup for now.

At this point, the Pixel is created in your Events Manager, but we need to add the code to your website for it to start tracking. We’ll do that in **Step 7** using Buildy.

A note on what’s in the Pixel code: It’s a JavaScript snippet that initializes your Pixel ID and tracks a default **PageView** event. It looks like this (with your unique Pixel ID in place of `<YOUR_PIXEL_ID>`):

```
<!-- Meta Pixel Base Code -->
<script>
  !function(f,b,e,v,n,t,s){if(f.fbq)return; n=f.fbq=function(){n.callMethod?
  n.callMethod.apply(n,arguments):n.queue.push(arguments)};
  if(!f._fbq) f._fbq=n; n.push=n; n.loaded=!0; n.version='2.0';
  n.queue=[]; t=b.createElement(e); t.async=!0;
  t.src=v; s=b.getElementsByTagName(e)[0];
  s.parentNode.insertBefore(t,s)}(window, document,'script',
  'https://connect.facebook.net/en_US/fbevents.js');
  fbq('init', 'YOUR_PIXEL_ID_HERE'); // Initialize your Pixel
  fbq('track', 'PageView');          // Track a page view
</script>
<noscript><img height="1" width="1" style="display:none"

src="https://www.facebook.com/tr?id=YOUR_PIXEL_ID_HERE&ev=PageView&noscript=1
"
 /></noscript>
<!-- End Meta Pixel Code -->
```

You’ll add this **base code** to your website’s header (so it loads on every page). We’ll cover that shortly with Buildy’s help.

Step 5: Assign Admin Access to Assets in Business Settings

Now that you have your Page, Ad Account, and Pixel set up, make sure the **business owner’s Facebook profile** (likely your profile) has the proper access to all these assets. By default, if you created them, you should have admin access. But it’s good to verify and also know how to grant access to others if needed.

In **Business Settings > People**, you’ll see your own name (and any team members if added). Click your name, and on the right you can view asset access:

- Under **Pages:** Ensure your Page is listed with the role **Admin**. If not, click **Add Assets**, select the Page, and toggle **Full Control / Admin Access**, then **Save**[14].

- Under **Ad Accounts:** Similarly, make sure your new Ad Account is assigned with **Admin** access to you. If not, use **Add Assets** > Ad Accounts, select the account and grant full control.
- Under **Pixels:** Check that your Pixel is listed. If not, click **Add Assets** > Pixels, and assign the Pixel to yourself[15].

This step ensures you (or the business owner's Facebook user) can manage and edit the Page, launch ads with the Ad Account, and view Pixel data. It's especially important if someone else set up the assets – the business owner should be an Admin on everything for full control[15]. (If you work with employees or agencies now or in the future, you'll use this People section to grant them appropriate permissions without giving away your personal login.)

Step 6: Link the Pixel to Your Ad Account (for Conversion Tracking)

By default, a new Pixel is not connected to your Ad Account. We need to **assign the Pixel to the Ad Account** so that when you run lead-generation campaigns, the ad system can use that Pixel's data (like the Lead event) to optimize your ads. Here's how:

1. Still in Business Settings, go to **Data Sources > Pixels** and select your Pixel from the list.
2. Click the **Connected Assets** tab (this shows which ad accounts or other assets can use this Pixel). Then click the **Add Assets** button.[16]
3. In the dialog, select **Ad Accounts**, then check the box next to your Ad Account name, and click **Add**.[16]

After this, your Ad Account is linked to the Pixel. This means when you create ad campaigns optimized for "Lead" conversions, you'll be able to select your Pixel and the Lead event. Without this step, the Ads Manager might not know your Pixel exists when setting up the campaign.

Step 7: Install the Pixel on Your Website (using Buildy)

Now we have a Pixel and need to install its code on your website to track visitors and leads. We'll use **Buildy** to help implement the Pixel code, which saves you from manually editing code. Buildy can add code to your site and answer questions about tracking.

7A. Add the Pixel Base Code to your site: Open Buildy and prompt it to insert the Pixel's base code on all pages. For instance, you might say:

- *"Here is the base Meta pixel code I want to put on my website. Add this code to the `<head>` of every page on my website:"* and then paste the Pixel base code snippet you copied earlier.

Buildy should confirm that it inserted the code site-wide The code needs to be between the `<head>` and `</head>` tags of your site's HTML[17], so it loads on every page and triggers a **PageView** event whenever someone visits.

7B. Add the Lead event code at the best spot: The Pixel base code by itself tracks page views for every page on your site. To track leads (form submissions or sign-ups), we'll use the Pixel's **Lead event**. Typically, you fire the Lead event on a form's thank-you page or when the form is submitted. Ask Buildy for advice, for example:

- *"What is the best place to add the Pixel's `Lead` event code on my site to track opt-ins?"*

Buildy might suggest adding it on your **Thank You page** that users see after submitting a lead form (this is a common approach)[18]. If your site redirects to a "thank you" or confirmation page after a user fills out the lead form, that's an ideal place to fire the Lead event. Alternatively, Buildy might help attach the event to a form submission button.

Implement the Lead event: Once you know where to put it, have Buildy insert the Lead event code. The standard Lead event code looks like:

```
<script>
  fbq('track', 'Lead');
</script>
```

If you have a dedicated thank-you page, you can place this in the `<body>` of that page (right after the opening `<body>` tag or anywhere on that page)[19]. If there's no separate page (e.g., the form just shows a "Thank you" message on the same page), Buildy can help attach a script to fire `fbq('track', 'Lead')` when the form is submitted. You might prompt Buildy with something like: *"Insert the Pixel Lead tracking code so it runs when the contact form is successfully submitted."*

Buildy will handle the technical insertion. Be sure to save and publish the changes to your site after Buildy adds the code.

7C. Confirm with Buildy or ask questions: You can ask Buildy to double-check, e.g., "Did we correctly install the Pixel code on all pages and the Lead event on the thank-you page?" Buildy can also answer additional questions about Pixel tracking, such as how to test events or troubleshoot issues.

> **Pro Tip:** Document which pages/events you added Pixel code to (e.g., note that *Lead* event fires on **/thank-you** page). This will help when creating audiences or if you need to adjust tracking in the future.

Step 8: Test and Verify Pixel Tracking (PageView and Lead)

With the Pixel installed via Buildy, it's crucial to test that it's working correctly. You want to see that the Pixel is firing a **PageView** on page loads and a **Lead** event when someone completes the form. There are two primary ways to test:

- **Meta Events Manager – Test Events:** Go to Facebook's Events Manager (find your Pixel there). Use the **Test Events** tool: enter your website URL and click **Open Website**. Navigate through your site and complete a test lead form. In the

Events Manager, you should see incoming events in real time. Look for a **PageView** event when you opened the site, and a **Lead** event after submitting the form. This confirms the Pixel is receiving data. If they don't show up, there might be an installation issue.

- **Meta Pixel Helper (Browser Extension):** This is a free Chrome extension that detects Meta Pixel code on any website.[20] Install the **Meta Pixel Helper** from the Chrome Web Store[21] and then visit your website. The extension icon will turn blue with a small number if it finds Pixel events on the page[22]. Clicking the icon shows which Pixel ID was found and which events fired. For example, on your homepage it should list "PageView". After submitting your lead form and reaching the thank-you page, it should show a "Lead" event as well. Make sure the Pixel ID in the helper matches your Pixel's ID from Events Manager[23].

Screenshot: Using the Meta Pixel Helper to verify your Pixel is active. Here it shows a Pixel ID detected and a PageView event on the site.[24]

If the Pixel Helper shows errors or the events don't register in Events Manager, double-check that the code was added to the correct places. Common issues include the base code missing on some pages or the Lead event code not firing. Buildy can assist in troubleshooting: you can ask things like "Why am I not seeing the Lead event fire?" and go through its suggestions (e.g., ensure the code is on the right page, not blocked by ad blockers, etc.[25]).

Once you see **PageView** and **Lead** events working, congratulations – your tracking is set! This means Facebook can record and optimize for the leads coming through your website.

Setup Section – Checklist

- ☐ **Meta Business Account created** (Business Suite/Portfolio) and verified[1]
- ☐ **Facebook Business Page added** to Business Account (or created new)[5]
- ☐ **Ad Account created** in Business Settings (with correct currency, time zone)[8]
- ☐ **Payment method added** to Ad Account (for when you start running ads)
- ☐ **Meta Pixel created** in Events Manager[11]
- ☐ **Business owner assigned as Admin** on Page, Ad Account, and Pixel[14][15]
- ☐ **Pixel connected to Ad Account** (via Connected Assets in Business Settings)[16]
- ☐ **Pixel base code installed on website** (in site header via Buildy)
- ☐ **"Lead" event code added** on the form thank-you page or form submission (via Buildy)[19]
- ☐ **Pixel verified working** – PageView and Lead events tested successfully[26]

With the groundwork completed, you're ready to create a lead-generating ad campaign!

Section 2: Creating a Lead Ad Campaign in Meta Ads Manager

Now it's time to build your ad campaign to start driving leads to your website. We will use the **Leads** objective in Meta Ads Manager, configured to send people to your website (not to Facebook's native lead forms). This way, when people click your ad, they land on your site's landing page and can be tracked by the Pixel we set up.

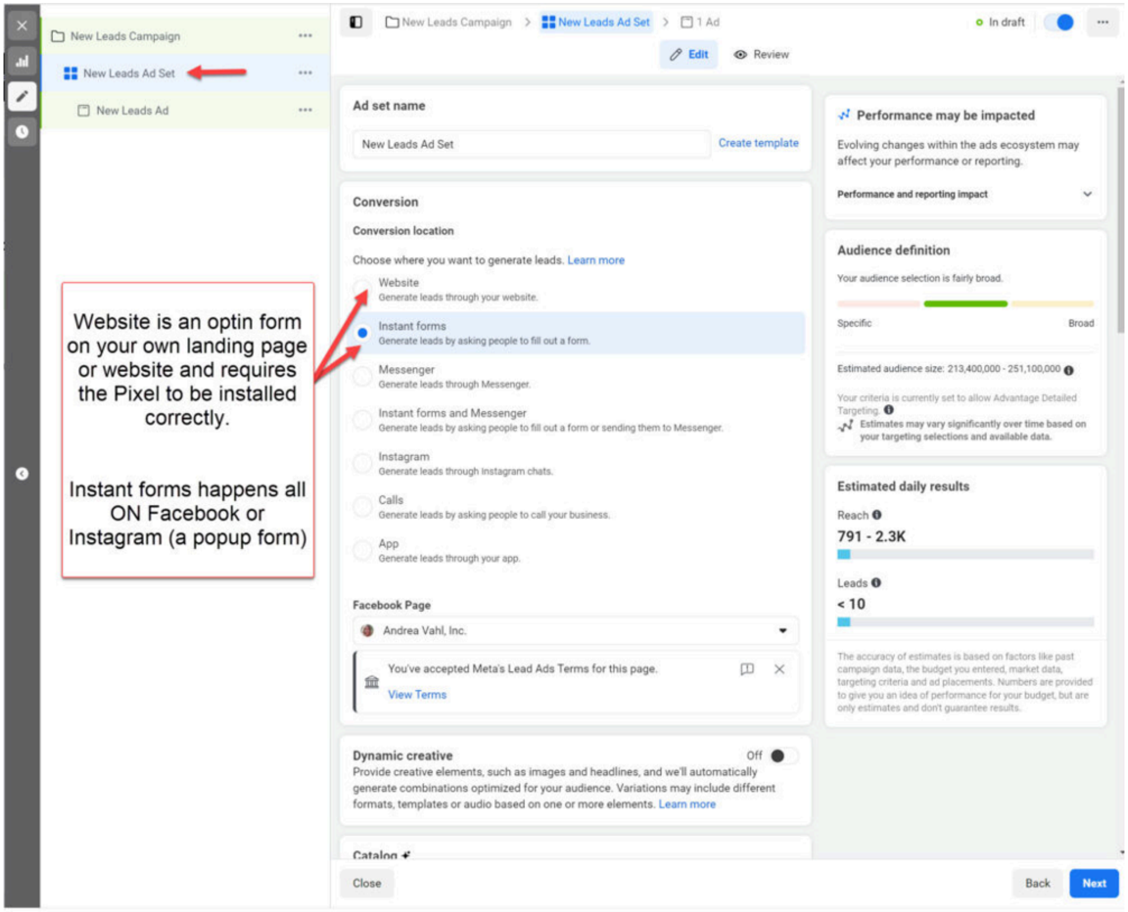
We'll walk through setting up the **Campaign**, **Ad Set**, and **Ad** step-by-step, with tips on each. By the end of Section 2, you will have a live lead generation campaign targeting your desired audience, with ads directing to your website's lead form. We'll also cover what to expect after launching (review process, learning phase).

Step 1: Start a New "Leads" Campaign and Choose Website Conversion

All campaigns are created in **Meta Ads Manager**. Navigate to Ads Manager (via the **Open in Ads Manager** button when you have selected an ad account in your Business Settings page or the Ads Manager link in Business Suite). Then:

1. Click the green **Create** button to start a new campaign.[27]
2. For the campaign objective, select **Leads** (it might be listed under objectives like Awareness, Traffic, Engagement, Leads, etc.). This tells Facebook you want to optimize for lead generation.
3. **Important:** When you choose Leads, Meta will ask you to select a **Conversion Location**. Options include *Instant Forms*, *Website*, *Messenger*, *Calls*, etc. Select **Website** as the conversion destination for your leads[28]. (This ensures the campaign is set to drive people to your website and count a conversion when the Pixel's Lead event fires.) Do **NOT** select "Instant Forms" – we're avoiding Facebook's native forms in favor of your website form.

4. *Why not Instant Forms?* While Instant Forms (Facebook's built-in lead forms) can yield a higher quantity of leads, those leads often have lower intent/quality, and they bypass your website and Pixel. By using your website, you can pre-qualify users with more info and track their behavior. In fact, many advertisers find **website leads are higher quality** – you can showcase your product/service on a landing page and "filter out" people less interested[29]. You'll also own the data immediately in your site/CRM, rather than downloading it from Facebook. So even if Facebook prompts you to use Instant Forms, stick with **Website** for better long-term lead value.



5. **Name your campaign** something descriptive (e.g., "Website Leads – Sept 2025 Campaign"). This is just for your reference to differentiate campaigns.

6. If presented with any special category questions (e.g., for credit, housing, or employment ads, which must comply with non-discrimination rules), select the appropriate category. Otherwise, you can skip special ad category classification.
7. We will not use Campaign Budget Optimization (CBO) for now (to keep things simple, we'll set budget at the Ad Set level). You can leave CBO off unless you explicitly want to optimize budget across multiple ad sets.

After these steps, your Campaign level is set: Objective = Leads (Website). The next steps will be at the **Ad Set** level, where we define the conversion event, audience, placements, and budget/schedule.

Step 2: Configure the Ad Set (Conversion, Audience, Placements, Budget)

Think of the **Ad Set** as the "who, where, and how" of your lead campaign. We'll specify what conversion to optimize (Lead event), who to target, where the ads show, and how much to spend. Key settings:

- **Ad Set Name:** Give the ad set a clear name, perhaps reflecting the audience or offer (e.g., “Leads – Target: USA Broad”). This is internal for you.
- **Conversion Event:** This is critical. Since we chose “Website” for leads, you’ll need to pick the **Pixel and conversion event** to optimize for. Select your Pixel and choose **Lead** as the conversion event (from the drop-down list of standard events)[30]. This tells Meta to find people likely to complete a Lead event on your site. *(If your Pixel is new and “Lead” isn’t available to select yet, ensure the Pixel is properly connected to the ad account and that the Lead event is set up. You might need to trigger a test Lead event first by completing the opt-in action on your live site. You will have to refresh Ads Manager if you needed to do this. You can also use the “Website leads” optimization which lets you track leads by the Lead event.)*

Screenshot: Setting the Ad Set’s Conversion action to Website and selecting the Lead event (from your Pixel) as the optimization goal.[31]

- **Dynamic Creative:** You can leave this off for now (it’s an advanced feature for testing many creative variants automatically). As a beginner, we’ll set up one ad manually.
- **Audience (Targeting):** Define who should see your ads. If you’re new and have no prior data, a **broad audience** can actually work well with a conversion campaign – the algorithm will learn who converts. You can start with basic targeting:
- **Location:** Set the locations you want leads from (e.g., countries, regions, or a radius around an area). By default, it may use your business country. Edit this to your desired market.
- **Age and Gender:** If applicable, adjust the age range or gender. For most campaigns, you might leave it broad (e.g., 18-65+, All genders) unless your service is clearly age/gender-specific.
- **Detailed Targeting (Interests/Demographics):** For lead gen, you might choose some relevant interests or behaviors if you know your target demographic. For example, if you offer a B2B software, you could target interests like “Business Owners” or specific industries. However, be cautious: adding too many filters can narrow your audience. When you first start running ads for a new project, a broad audience often performs well for conversions while Meta’s AI finds the right people. If unsure, you can skip adding interests initially – Meta will optimize using the Pixel data.
- **Custom Audiences:** If you have a Custom Audience (like from Section 3, e.g., retargeting website visitors), you could select it here. For a first cold campaign, you might not use one yet (we’ll discuss using Custom Audiences in retargeting campaigns later).

Example: To start, you might target "Everyone in [your country]" of relevant age range. That's it. This gives Meta a large pool to find those likely to convert.

- **Placements:** This controls where your ads appear (Facebook news feed, Instagram feed, Stories, etc.). The default (and Meta's recommendation) is **Advantage+ (Automatic) Placements**, which means Meta will show your ads across all placements (Facebook, Instagram, Messenger, Audience Network) to optimize results. For beginners, this is usually best – let the algorithm decide where you get cheaper leads[32][33]. Ensure **All devices** are included as well (both mobile and desktop). If you have strong reasons to limit placements (like your creative is only designed for feed, or you don't want Instagram), you can choose **Manual Placements** and select/deselect options. Otherwise, stick with automatic for broader reach.

- **Budget & Schedule:** Set how much you want to spend and the timing:

- **Budget:** You can choose Daily Budget (spend up to $X per day) or Lifetime Budget (spend $Y total over the campaign's lifetime). Daily is straightforward for an always-on lead campaign. Start with an amount you're comfortable with; even \$5–\$20 per day can be enough to gather data as you begin[34]. Keep in mind, results scale with budget – a very low budget might generate only a few leads. Meta will pace your spend throughout each day.
- **Schedule:** You can have the campaign start immediately and run continuously, or set an end date. If this is a short promotion, you might set an end date. We recommend not setting an end date because pause it later manually. Meta will enter a **Learning Phase** initially (the first ~50 conversion events) to optimize delivery, so running for at least 3 full days days is recommended to get stable results. If you are starting with a low budget, e.g. $2 - $10 per day, you may want to run it for 5+ days to allow more optimization of the ad to occur.

For example, you might set a daily budget of $10/day with no end date, meaning it will spend about $10 each day until you stop it. Meta will try to get you the most leads for that budget daily.

Double-check all these Ad Set settings. Especially ensure the **Pixel and Lead event are selected correctly** – this is what ties your campaign to website conversions[31]. Once done, you'll move on to creating the ad itself.

Step 3: Create the Ad (Creative, Text, URL, and CTA)

The Ad level is where you design what the audience actually sees – the ad content. This includes your Facebook Page identity, ad format (image, video, etc.), media, text, and the call-to-action with a link to your site. Here's how to set it up:

- **Ad Name:** Give your ad a name (internal use) like "Lead Ad – Image 1" or "Lead Ad – Sept2025 v1". If you'll have multiple ads, naming helps keep track.

- **Identity:** Choose the Facebook Page (and Instagram account if applicable) that the ad will appear to come from. It should default to the Page you added. Confirm the correct **Facebook Page** is selected as the ad's identity[35]. If you have an Instagram account connected and want the ad on Instagram, you can select it too. If you don't have an Instagram account, you can still run ads on Instagram; the ads will just use your Facebook Page name and profile pic on Instagram placements[36].

- **Ad Format:** For lead generation, common formats are **Single Image** or **Single Video** ads, or Carousel (multiple images). As a beginner, using a strong single image or video that highlights your offer is a great start. Select **Add Image** or **Add Video** under Media to upload your creative[35]. Choose an eye-catching image relevant to your offer or a short video if you have one. Make sure it's high-quality and meets Facebook's ad specs (e.g., recommended 1080x1080 px for images in feeds).

- **Primary Text:** This is the main text of your ad that appears above the image/video. Write a clear, concise message that explains your offer and encourages action. For example: *"Looking to [solve problem]? Get our free guide now – learn how to [benefit]."* Keep it simple and highlight why they should become a lead (what value they get).

- **Headline:** A short bold text that appears below the image (or near the CTA button). Often used as a call-out or summary. For example: *"Download Your Free Guide"* or *"Get a Free Consultation"* – something that reinforces the action.

- **Description:** (Optional, not always shown) – a slightly longer text below the headline. You can often leave this blank or use it to add one more detail or tagline, but on some placements it won't appear.

- **Call To Action (CTA) Button:** Choose the button label that best fits your desired action. Common ones for lead gen are **"Learn More"**, **"Sign Up"**, **"Get Quote"**, **"Download"**, etc. For example, if you're offering a free eBook for leads, "Download" or "Learn More" could both work. Pick one that matches the context (don't worry, it doesn't affect functionality beyond the text).

- **Website URL:** This is critical – input the **landing page URL** on your website where you want to send people who click the ad[37]. This will normally be the home page of your website for a survey-type app. Double-check that the URL is correct and live. When users click the ad, they will go here. *Example:* If your site is example.com that's the page your survey starts on, use that URL. If the survey is published to another page on your site, e.g. example.com/survey, use that. Often, it's a dedicated landing page that has a clear call-to-action (e.g., a contact form or signup form) and also the Pixel code with the Lead event on the thank-you step.

- **Display Link:** (Optional) You can set a shorter or cleaner display link if your URL is long, but this is not mandatory. It's mainly cosmetic. It does have to match the website from the previous step.

After filling in these fields, a preview of your ad will be generated on the right side of Ads Manager. Review it on different placements (use the preview dropdown to see how it looks in Facebook feed, Instagram feed, etc.). Ensure that: - The text is clear and not cut off. - The image is not cropped awkwardly or violates any of Meta's ad policies [51] - The headline and CTA make sense and the URL is correct.

Linking to Pixel: Because your Pixel code is on the landing page, any user who clicks and then submits the form will trigger the Lead event, which gets attributed back to your ad. Just make sure the landing page indeed has the Pixel base code (you can use the Pixel Helper on the landing page to confirm a PageView triggers).

Tip: It's often effective to mention your offer or CTA both in the text and the headline. For example, *"Sign up for a free demo"* in the headline, and the text might say *"Limited spots available – schedule your free demo of [Product] and see how it can [solve problem]"*. Keep a supportive, helpful tone, as if you're guiding the user to something beneficial (because you are!).

Once the ad looks good, you have essentially configured your campaign.

Step 4: Review and Publish Your Lead Campaign

Before hitting publish, double-check each level:

- **Campaign level:** Objective is Leads (with Website as conversion location), campaign name set, no errors.
- **Ad Set level:** Pixel and **Lead** event are selected for Conversion[31], audience targeting is as intended (location, any interests, etc.), placements set to Automatic (or your choice), budget and schedule are correct (e.g., daily \$X, starting immediately).
- **Ad level:** Correct Facebook Page identity, the ad copy is typo-free, image/video is clear, CTA button and URL are pointing to the right landing page, and Pixel is on that page.

When ready, click **Publish** (or **Confirm**). Your campaign will be submitted to Meta for review.

What to Expect After Publishing:

- **Ad Review:** Every ad goes through a review by Facebook's system (and sometimes manual checks) to ensure it meets their advertising policies (no prohibited content, proper wording, etc.). This usually takes anywhere from a few minutes to a few hours. Meta warns it can take up to 24 hours or more, but often it's quicker[38]. During this time your campaign status will be "In Review." Just wait – no leads will come in until it's approved. If approved, the status will turn to

"Active" and the ads will start running. If there's an issue, the ad could be **Rejected**. If that happens, don't panic – Facebook will list a reason (e.g., use of a forbidden word or image). You can edit the ad to comply and resubmit, or appeal if you believe it was a mistake.

- **Learning Phase:** Once active, the campaign enters the **learning phase**. The Meta algorithm will show your ad to different segments of the audience to learn who is converting. Typically it aims for about 50 conversions (leads in our case) in the first week or so to "learn" efficiently. During learning, performance (cost per lead) may be a bit unstable – it usually improves as learning completes. If your volume is low (e.g., small budget or narrow audience), you might stay in learning limited, which is okay; just be aware it means the algorithm has less data and performance may not fully stabilize[39]. The key is to continue running so the system can optimize.

- **Results Monitoring:** You can monitor the campaign in Ads Manager. You'll see metrics like **Impressions** (how many times the ad was shown), **Clicks**, **CTR**, and most importantly **Results** which for you will be the number of Leads (Pixel fires) and **Cost per Result**. Initially, give it some time (a few full days) to gather data. Don't panic if day one you have zero leads – it may take some optimization and enough people seeing it. Also ensure your landing page is functioning and user-friendly, as that affects whether people actually convert after clicking.

- **Learning and Adjusting:** If after a week you find the cost per lead is high or no one is converting, you might consider tweaks:

- Check if the targeting is too broad or not relevant – maybe add an interest to refine, or exclude obvious out-of-scope groups.
- Or, conversely, if you targeted too narrowly, try broadening.
- Test a different image or tweak the text – sometimes creative changes can improve results. (You can create another ad under the same ad set for an A/B test.)
- Ensure your landing page is convincing – the ad can get the click, but the page must get the form filled. If many click but few convert, the issue might be the page or form rather than the ad.

For now, as a beginner, focus on letting the campaign run to gather some leads and data. Meta's algorithm is quite powerful in finding the right people, given the correct objective and Pixel events (which we set up).

Finally, recall our goal: driving *website* leads. This means we won't use the *Instant Forms* even if Meta suggests them. In our setup, we explicitly chose **Website** conversion for leads, which is aligned with Meta's recommendation for driving website contacts[40]. So you've followed best practices to get quality leads that you can nurture directly on your site/CRM.

Before moving on, pause and celebrate – you've launched a Meta lead gen campaign! 🥳 Now let's prepare to maximize its effectiveness with custom and lookalike audiences.

Campaign Section – Checklist

- ☐ [x] **Campaign objective set to Leads** with conversion location = Website (not Instant Form)[28]
- ☐ [x] **Campaign named** clearly (and Special Ad Category set if applicable)
- ☐ **Ad Set uses Pixel & Lead event** for optimization[31]
- ☐ **Audience targeting configured** (locations set, broad or specific interests as needed)
- ☐ **Automatic placements enabled** for wider reach (or manual choices made intentionally)
- ☐ **Daily or Lifetime budget** set appropriately, with schedule start/end as intended[34]
- ☐ **Ad identity** correct (Facebook Page and Instagram account, if used)[35]
- ☐ **Ad image/video added** and compliant with guidelines (clear, relevant, minimal text on image)
- ☐ **Ad copy (primary text) written** – highlights offer and encourages action
- ☐ **Headline and CTA** set (clear headline, appropriate call-to-action button)
- ☐ **Landing page URL** added to ad and verified (Pixel is active on that page)[37]
- ☐ **Ad reviewed** in preview for all placements (looks good on Facebook/Instagram feeds, etc.)
- ☐ **Campaign published** and under review (await approval)
- ☐ **Post-launch monitoring set up:** Plan to check results, watch for learning phase completion, and ensure leads are coming in as expected
- ☐ **Ad Strategy note:** Not using Instant Forms – focusing on website leads for higher quality[29]

With your campaign running, you can start accumulating leads. Next, we'll enhance your targeting using Custom Audiences (like retargeting site visitors) and Lookalike Audiences (finding new people similar to your leads) to scale and optimize your results.

Section 3: Creating and Using Custom & Lookalike Audiences

To maximize your lead generation, it's vital to leverage Meta's advanced targeting tools: **Custom Audiences** (for retargeting people who already interacted with your business) and **Lookalike Audiences** (for finding new people similar to your existing audiences). In this section, we'll create three key Custom Audiences and then build Lookalike Audiences from them. We'll also cover best practices on how to use these audiences in your campaigns – for example, retargeting recent site visitors with follow-up ads, or using lookalikes to reach fresh prospects who resemble your current leads or customers.

By the end of Section 3, you will have: - Custom Audiences for **all website visitors**, **specific page visitors**, and **Lead converters**. - Lookalike Audiences based on those groups. - An understanding of how to apply these audiences in ad sets for retargeting (warm audience ads) and prospecting (cold audience ads with lookalikes), including tips to optimize each.

Step 1: Create a Custom Audience of All Website Visitors

A **Custom Audience** allows you to target (or exclude) people who have already interacted with your business. One of the most valuable is a Website Custom Audience of everyone who visited your site – these are warm prospects who showed interest. To create this:

1. Go to **Audiences** in Ads Manager. (In Business Suite, click the menu and find **Audiences**; this opens the audience manager.)[41]
2. Click the **Create Audience** dropdown and select **Custom Audience**.[41]
3. You'll see a list of sources – choose **Website** as the audience source (since we're using Pixel data)[42].
4. Now configure the website audience details:
5. **Pixel:** Choose your Pixel as the data source (if you have more than one, ensure you pick the correct one).
6. **Include:** Select **All website visitors** as the criterion[43]. This means anyone who visited any page tracked by your Pixel.
7. **Retention window:** Set how far back you want to include visitors. The maximum is 180 days. For an "all visitors" audience, many advertisers use 180 days to get the largest pool[44]. If you have a ton of traffic, you could limit to 30 or 90 days for recency, but as a beginner, 180 days (the default) is fine to catch all recent visitors.
8. **Audience Name:** Give it a clear name like "All Website Visitors – 180d". You can add a description if you like (e.g., "Everyone who visited any page in the last 180 days").

9. Click **Create Audience** to save it[45].

Now Meta will start populating this audience from your Pixel data. If your Pixel was recently installed, this audience will begin building as people visit your site (it can include past visitors up to the retention window from when the Pixel was active). Once ready, you can use “All Website Visitors” in ad targeting to **retarget** those people – for example, show them an ad reminding them to complete the lead form or offering an incentive, since they already know your site.

Step 2: Create Custom Audience of Specific Page Visitors (e.g., Key Page or Funnel Step)

Sometimes you want to hone in on people who visited a particular page – for instance, a product page, pricing page, or a landing page for a lead magnet – which indicates deeper interest. You can create a custom audience of visitors to a specific URL or URL keyword:

1. Create another **Custom Audience** (Audiences > Create Audience > Custom Audience). Choose **Website** as source again.
2. This time, in the setup, select **People who visited specific web pages** from the criteria dropdown[43]. This lets you filter by URL.
3. You’ll get fields to specify the URL or part of it. You can choose **“URL contains”** or **“URL equals”** depending on your case.
4. For example, if your lead form is at `https://example.com/contact`, you could use URL contains “/contact”. Or if it’s a longer URL, you might use a unique keyword from it.
5. If you want an audience of people who visited your lead page but maybe didn’t convert, you’d capture everyone who hit that page. *(We’ll exclude converters separately in your campaign settings as needed.)*
6. Another example: If you have a special landing page like `example.com/offer1`, use “URL equals offer1” or “URL contains offer1”.
7. Set the **retention** days. If it’s a very specific page (with fewer hits), you might stick to 180 days to get more people. If it’s a high-traffic page and you want recency, you could do 30 days.
8. Name the audience descriptively, e.g., “Visited Pricing Page – 30d” or “LandingPageX Visitors – 180d”.
9. Create the audience.

This custom audience will include anyone who visited the specific page(s) you defined. One common use for lead gen: target those who visited your lead form page but **did not see the thank you page** (meaning they didn’t convert). To do that precisely, you’d create an audience of those who visited the form page, and when running retargeting ads, **exclude** those who converted (we’ll cover excluding in a moment). But even without that exclusion, just retargeting page visitors in general is beneficial.

Step 3: Create Custom Audience of People Who Triggered the “Lead” Event

The ultimate group you may want to leverage is people who already became leads (triggered the Lead Pixel event). You might wonder, *why advertise to people who already converted?* Often, you don’t – instead, you use this audience to **exclude existing leads** from prospecting campaigns (so you don’t waste money showing ads to people who have signed up already), or to create lookalikes (find similar people). However, you might also re-target leads with a different message (e.g., upsell or nurture ads).

To create a custom audience of converters:

1. Again, Create Audience > Custom Audience > Website.
2. This time, use the option for **“From your events”** – i.e., include people who took a specific Pixel event action[43].
3. You should see a list or dropdown of standard events (if your Pixel has them). Select **Lead** as the event to build the audience from. It may say “Lead (includes URL/X)”. If needed, there might be an intermediate step: choose the Pixel, then “Event: Lead”.
4. Set retention. 180 days is common for converters, but you could do shorter if, say, leads older than 6 months aren’t relevant. Let’s use 180d for maximum size unless you have a reason to narrow.
5. Name it “Leads (Pixel) – 180d” or similar.

When you create it, Meta will gather all users who fired the Lead event in that timeframe. If your Pixel just went live, this audience will grow as new leads come in, so it might be small at first. This is okay.

Using these Custom Audiences: - *All Website Visitors*: great for retargeting – e.g., show an ad to encourage them to return and sign up (“Come back for 10% off our service when you register!”). These folks know your brand, so retargeting typically has higher conversion rates. - *Specific Page Visitors*: even warmer – they showed interest in a specific thing. You could tailor ads to that interest. E.g., “Interested in [Product]? Here’s a demo video – check it out!” - *Leads (converters)*: usually used to **exclude** from campaigns (no point asking them to sign up again), or to move them down the funnel with different ads (like if leads should take another action, you can target them with another campaign).

One best practice is to **exclude converted leads from your active lead-gen campaign targeting**. For example, in the ad set of your main campaign (from Section 2), you can add an **Exclusion**: Custom Audience = Leads (180d). This way, as soon as someone converts, Facebook won’t show them the lead-gen ad again, saving you money and avoiding annoyance. We’ll talk more on exclusions in best practices.

Step 4: Create Lookalike Audiences Based on Your Custom Audiences

Lookalike Audiences (LALs) are a powerful way to find new people who share characteristics with your existing audience. Meta takes a “source” audience (for example, your website visitors or leads) and finds other users who are similar in behavior/demographics. This can dramatically improve prospecting (cold targeting) efficiency.

To create a Lookalike Audience:

1. In Audiences, click **Create Audience** and choose **Lookalike Audience**.
2. **Select a Source:** It will prompt you to choose a source for the lookalike. You can select one of the Custom Audiences you made (or other sources like your Page’s followers, etc.). Let’s say we choose the **Leads (Pixel) 180d** audience as the source, since people who converted are likely a great template for finding more prospects. *(Note: You generally need at least ~100 people in the source from one country for a LAL. If your leads are still very few, you could use All Website Visitors as an alternate source for now, or wait until more leads accumulate. Using website visitors as a source is okay if leads are minimal – it targets people similar to those who showed interest in your site.)*
3. **Select Audience Location:** Choose the country (or countries/region) where you want the lookalike. Typically, it’s the country where you do business or where your current audience is. For example, if your customers/leads are mainly in Norway, you’d pick Norway. If you have a global customer list, you can do multiple lookalikes per region. The source audience should also mostly come from that region for best results.
4. **Select Audience Size:** This is the percentage of the population (in the chosen country) that will be included. Ranging from 1% (very narrow, most similar to your source) to up to 10% (broader, less similar). A 1% Lookalike in a single country is the top ~1% of people most similar to your source in that country[46]. We recommend starting with **1%** for the highest similarity. This often yields the best quality (albeit smaller reach). You can create multiple – e.g., 1%, 2% – but as a beginner, start with a 1%. You can always test larger later if you need more scale.
5. Name your Lookalike something like “Lookalike – Leads 1% [Country]”.
6. Click **Create Audience**. Facebook will begin building it (it may show status “Populating”). This might take a short time. Once it’s ready, you can use it in your ad targeting.

If your source was “All Website Visitors – 180d”, you’d do the same: Lookalike of that audience, choose country, 1%. You can make separate LALs for each source audience you have: e.g., one from All Visitors, one from Leads. These different lookalikes might perform differently – a LAL of leads is usually more potent (since leads are a subset of visitors who took action, presumably making the lookalike more conversion-prone).

How to use Lookalikes: Lookalikes are ideal for **prospecting campaigns** – reaching new people who haven't interacted with you yet but are likely to be interested. For example, you could create a new ad set (or campaign) targeting the 1% Lookalike of your leads, to find fresh leads. Typically, you **don't layer additional targeting on a lookalike** (like don't add interests on top of it) – let the lookalike stand on its own, as it already represents a specific demographic/behavioral segment. You can, however, restrict location or age if needed, but usually it's not necessary if you made the LAL for a specific country and your product isn't age-restricted.

One more advanced note: sometimes advertisers exclude the source audience from their prospecting using lookalikes (to ensure none of the already-leads accidentally fall into the targeting). For example, exclude the custom "Leads" audience when using the lookalike in an ad set, just as a precaution. Lookalikes generally don't include the exact source users, but doing this guarantees no overlap.

Step 5: Best Practices for Using Custom and Lookalike Audiences

Now that you have these audiences, let's talk strategy on deploying them effectively:

Retargeting with Custom Audiences (Warm Audience Ads):

- **Always Retarget Your Site Visitors:** As the saying goes, "Don't let warm leads go cold." People who visited your site (or especially your form page) but didn't convert are prime candidates to convert later with a reminder or new angle. Set up a dedicated ad (or campaign) targeting the **All Website Visitors** (and/or specific page audience) with a tailored message. For example, "Still interested in [Your Service]? We're here to help – get a free consultation today." Such ads often have higher conversion rates at lower cost, because familiarity is built[47][48].

- **Exclude Converted Leads:** In those retargeting ad sets, be sure to **exclude** the Leads custom audience[49]. This prevents you from showing ads to people who already signed up (avoiding annoyance and wasted spend). For instance, your retargeting ad set targeting "All Visitors 180d" should exclude "Leads 180d". This way, the ad only hits people who visited but have not yet become leads.

- **Frequency Capping (Monitor Frequency):** Retargeting audiences are smaller, so ads can quickly saturate them. Watch the **Frequency** metric (how many times each person has seen the ad). If frequency goes too high (e.g., above ~5 in a short time frame), people might get annoyed. You can control this by lowering budget, rotating creatives, or using frequency controls (Facebook has a frequency cap setting in Reach objective campaigns, or you can simply refresh content often).

- **Offer/Incentive:** Warm audiences might convert with a smaller nudge. Consider offering something special in retargeting ads: a limited-time discount, a bonus, or simply a stronger call to action like "We saved your spot – complete your request". Make them feel it's personalized follow-up.

- **Timing Segments:** Some advanced retargeters create multiple audiences by time window – e.g., 3-day, 7-day, 30-day site visitors – and tailor messages differently (most urgent in first 3 days, etc.). As a beginner, a single 30d or 180d audience is fine, but keep this in mind as you grow.

Prospecting with Lookalike Audiences (Cold Audience Ads): - **Quality Source:** The effectiveness of a lookalike depends on the quality of the source audience. Your "Leads" audience is a high-quality source (people who converted). If it's large enough, that LAL will likely outperform one made from all visitors. If you have enough data, favor lookalikes of deeper-funnel events (like leads or purchasers) over just visitors[50] – because those source people demonstrated the desired behavior.

- **Start Small (1%):** Begin with the 1% lookalike. It's the most precise[46]. If you need to scale up later, you can test 2% or 3% but know each step up gets a bit less similar. Often, advertisers will run separate ad sets for 1%, 2-5%, etc., if needed. Initially, 1% might be sufficient and will likely yield the best cost per lead.

- **Combine with Broad:** If your lookalike audience is somewhat limited in size (say your country is small or you only have 100 leads, so 1% is maybe a few tens of thousands of people), you can consider also targeting broad interests alongside or running another ad set broad. But one simple approach is: use the lookalike as one targeting option and also run a **broad audience ad set** (no targeting filters, just country/age) and let Facebook find leads anywhere. You may be surprised; sometimes broad can do well once the Pixel has data. However, broad works best after you've accumulated some conversion data (which the algorithm uses).

- **Don't Mix Lookalikes and Interests in one ad set:** That can confuse the algorithm. Better to keep one ad set purely a lookalike, and if you want, another ad set for interest targeting. This way you can see which performs better.

- **Ad Creative for Lookalikes:** Treat lookalike audiences like cold prospects – they might not know your brand. So your ad should still introduce the value proposition clearly (like you did for broad targeting). The messaging might not assume they've been to your site. Basically, lookalikes often respond similarly to broad cold audiences, but hopefully with a higher baseline interest. So use your best "first impression" ad content here.

General Best Practices:

- **Refresh Audiences and Creatives:** Your custom audiences update automatically (if your Pixel is active) – they roll with the retention window. Lookalikes based on them also update periodically. It's good to occasionally check if the audience sizes are growing as expected. Also, refresh your ad creatives every so often (especially in retargeting) to prevent ad fatigue.

- **Privacy Considerations:** Custom Audiences from your Pixel are privacy-compliant as long as your site has proper consent (especially in regions with GDPR/etc., ensure you have a cookie consent if required since Pixel does collect user data). Just a reminder to follow Meta's terms and privacy laws – only retarget people in ways that you disclosed in your site's privacy policy.

- **Testing and Scaling:** Once you have these audiences, you can test separate campaigns:

    - A **Retargeting Campaign**: target Custom Audiences (visitors) with maybe a slightly higher budget efficiency (since these people are more likely to convert). Often advertisers run always-on retargeting to mop up any missed conversions.

    - A **Prospecting Campaign**: target Lookalikes and broad to bring new people in. Scale budget on what works (if LAL 1% is doing great at low cost per lead, you can increase its budget).

    - **Exclude overlaps:** If you run multiple campaigns, be mindful of overlaps. E.g., if you run a prospecting campaign to lookalikes, you should exclude your Custom Audiences of existing visitors/leads from it, so that new campaign doesn't accidentally retarget the same people (who might already be in retargeting campaign)[49]. This keeps prospecting truly reaching new folks, and retargeting reaching the known folks, without wasting impressions.

To illustrate the exclusion: For a lookalike ad set, you might exclude the source custom audience (like exclude "Leads" and "All Visitors"), ensuring those already familiar aren't included. This practice avoids showing "cold" ads to warm audiences who could see a more relevant retargeting ad.

Finally, keep an eye on performance. Custom audience sizes can be small, so you might not spend much if it's tiny. Lookalikes give you bigger scales to spend. Adjust budgets accordingly – heavier on prospecting to get new blood, lighter on retargeting just enough to cover the audience without excessive frequency.

You now have a sophisticated targeting toolkit: you can re-engage past visitors (often cheaper conversions) and algorithmically find new potential customers through lookalikes. This combination is potent for continually generating leads and then converting those who needed a second look.

Audiences Section – Checklist

- ☐ **Custom Audience: All Website Visitors** created (using Pixel data, retention set)[43]
- ☐ **Custom Audience: Specific Page Visitors** created (filtered by URL contains or equals for key pages)[43]
- ☐ **Custom Audience: Lead (Conversion) event audience** created (people who triggered Lead Pixel event)
- ☐ **Lookalike Audience(s) created** from valuable sources (e.g., Leads 1% [country])[46]
- ☐ Custom Audiences **populating with data** (Pixel is active to feed them)
- ☐ **Retargeting plan in place:** Using Custom Audiences in an Ad Set to re-engage visitors, with **exclusions** set (exclude leads from retargeting)[49]
- ☐ **Prospecting plan in place:** Using Lookalike audiences for new targeting in Ad Sets (e.g., 1% LAL of leads), excluding current audiences to avoid overlap
- ☐ **Monitored frequency** on retargeting ads (ensure we don't over-show ads to small audiences)
- ☐ **Ads tailored** to audience temperature: warmer messaging for retargeting, introductory messaging for lookalikes/cold audiences
- ☐ **Audiences named clearly** for easy management (e.g., include retention days, source)

☐ Understanding of **updating and scaling**: know that these audiences auto-update; prepared to adjust budgets and refresh creatives as needed for performance.

Congratulations! You've assembled a full lead generation machine on Meta:

- In **Section 1**, you set up the technical foundation (Business Manager, Page, Ad Account, Pixel) and tracked the key events.

- In **Section 2**, you created a live lead-gen campaign driving users to your website's form, with proper conversion tracking and expectations set for the campaign lifecycle.

- In **Section 3**, you enhanced targeting with Custom Audiences for retargeting and Lookalike Audiences for expansion, plus learned how to use them strategically.

This standalone guide should empower even a beginner to launch and optimize Meta (Facebook) ads for lead generation via a website. Remember to monitor your results, be patient as the algorithm learns, and continually test small improvements (new creatives, different audience segments) over time. With these tools and steps, you're well on your way to generating quality leads for your business. Good luck, and happy advertising!

---

[1] [4] [5] [7] [8] [9] [10] [11] [12] [13] [16] [18] [19] [24] [36] How to Create and Set Up Facebook Business Manager Account - SupremeDraw

https://www.supremedraw.com/blog/create-and-set-up-facebook-business-manager-account/

[2] [3] [6] [25] How to Set Up Meta Business Manager: Step-by-Step Guide ✨

https://madgicx.com/blog/facebook-business-manager-all-you-need-to-know

[14] How to assign page to people in business manager? – Peasy

https://peasy.ai/how-to-assign-page-to-people-in-business-manager/

[15] [20] [21] [22] [23] [26] Don't Advertise without the Meta Pixel for Facebook Tracking!

https://madgicx.com/blog/facebook-pixel

[17] Specifications for Meta Pixel Standard Events - Facebook

https://www.facebook.com/business/help/402791146561655

[27] [30] [31] [34] [35] [37] [38] MODULE 4: Quality Facebook Leads – leadpops Help Center by rebel iQ

https://support.leadpops.com/hc/en-us/articles/360042542353-MODULE-4-Quality-Facebook-Leads

[28] 6 Facebook Campaign Objectives Explained (2025 ODAX Guide)

https://bir.ch/blog/facebook-ad-objectives

[29] Lead to website or instant forms? : r/FacebookAds

https://www.reddit.com/r/FacebookAds/comments/1hmm8w8/lead_to_website_or_instant_forms/

[32] [33] [39] [47] [48] [49] The Best Strategies for Facebook Retargeting Ads in 2025 - LeadsBridge

https://leadsbridge.com/blog/facebook-retargeting-ads/

[40] About Conversion Locations and Events in Meta Ads Manager

https://www.facebook.com/business/help/1431172887335181

[41] [42] [44] [45] [46] [50] Facebook Custom Audiences & Lookalike Audiences: How to Create and Share Them Easily

https://www.leadsie.com/blog/how-to-create-and-share-access-to-facebook-custom-audiences-lookalikes

[43] A step-by-step guide to Facebook custom audiences - LeadsBridge

https://leadsbridge.com/blog/a-step-by-step-guide-to-facebook-custom-audiences/

[51] About Meta Advertising Standards.

https://www.facebook.com/business/help/488043719226449?id=434838534925385