



HOW TO FIND HIGH-QUALITY LEADS WITH META

GET LEADS THAT MATTER THE MOST WITH META'S HELP.

 **Meta**
Business Partner

Discoveries happen on Meta at an amazing scale all the time...

90%

of people surveyed say they discover new businesses on Meta apps more than any other platform.¹

3.45B

people²

200M

businesses²

Source 1 : Meta-commissioned survey of 4,866 Google and Facebook users. Dec 2023

Source 2: Meta, Q1 2023 Earnings Call



Why use lead generation with Meta?

Because it may help you find the people who will like your business the most.

Meet people where they are

Talk to potential customers through their preferred mode of communication — through forms, calls or messages.



Savvy marketers are appealing to more audiences by offering more ways to connect

INSTANT FORMS

16%

Commerce-friendly consumers* surveyed are 16% more likely to fill out lead ads on Meta than Google.¹

CALLS

81%

of surveyed people state that calls are their preferred channel when communicating with local and small businesses.¹

MESSAGES

1B

people are connecting with a business account across Meta messaging services every week.²

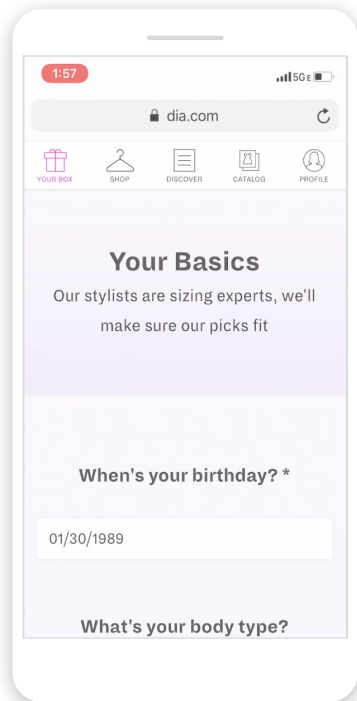
*Commerce-friendly consumers are defined as people who engage with ads once per day, have bought a product they've discovered from a social media ad in the last month and have a neutral to positive opinion of social media ads.

Source: 1. Meta-commissioned survey of 4,866 Google and Facebook users. Dec 2023.

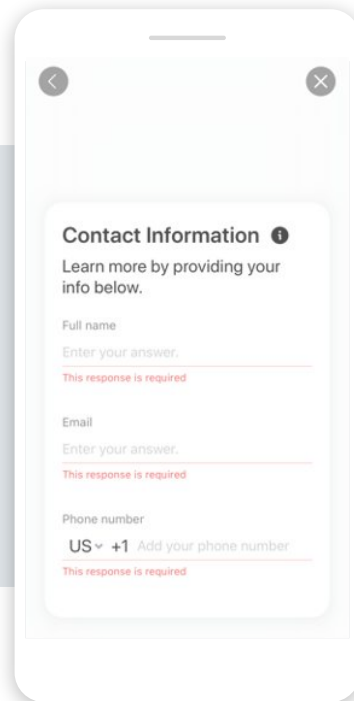
Source: 2. Q4 2023 Meta earnings call.

A suite of lead generation solutions that help businesses discover and convert potential customers

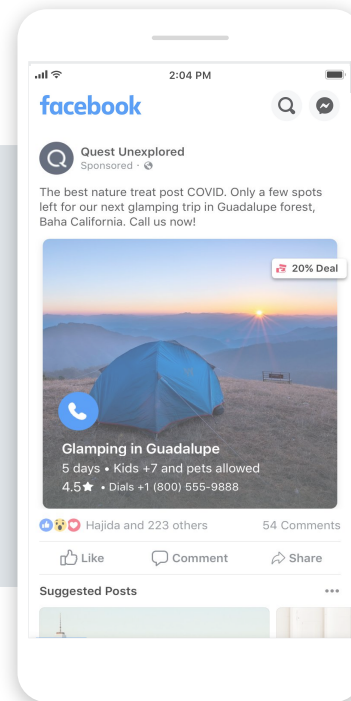
FACEBOOK ON-SITE SOLUTIONS



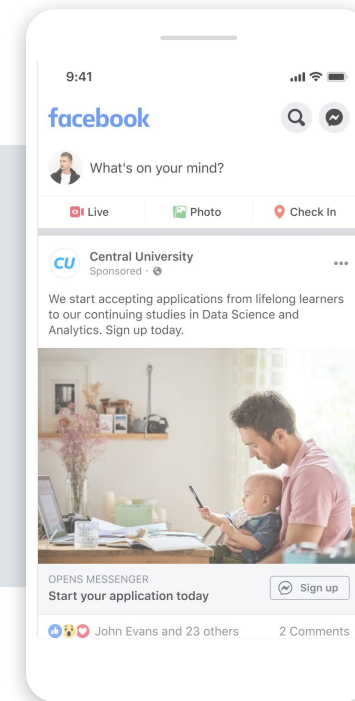
Website Conversions
(Website forms)



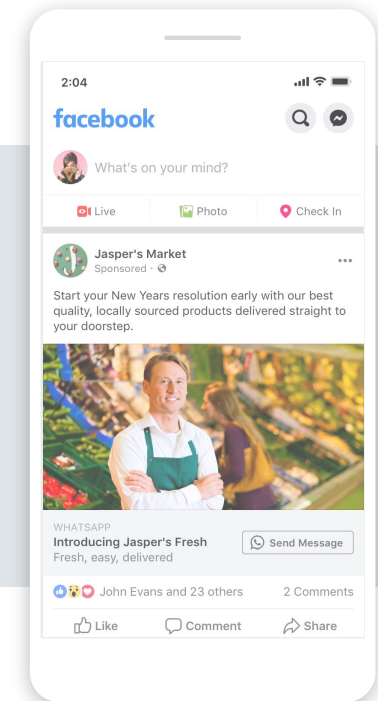
Lead Ads
(Instant Forms)



Call Ads & Call
Extensions



Lead Generation
in Messenger



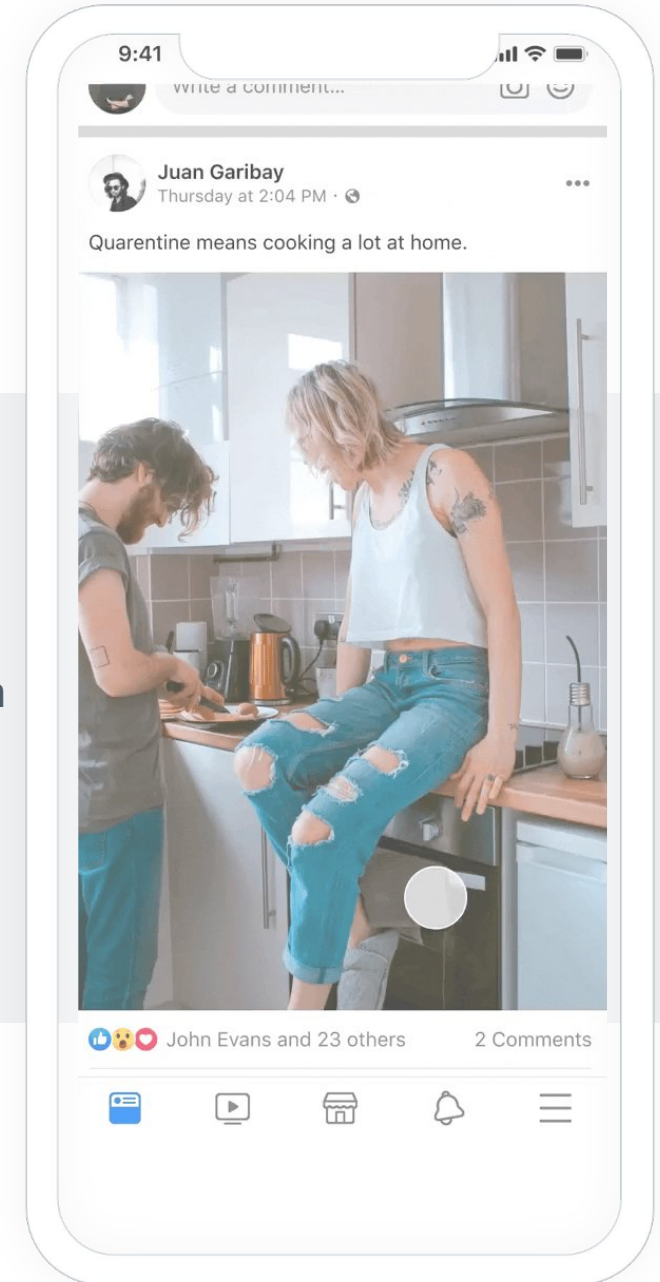
Ads That Click to
Message

Lead Ads enable people to express interest in **just a few taps**

Lead ads make it easier for potential customers to get more information from your business through a mobile-first form

LEAD ADS (Instant forms)

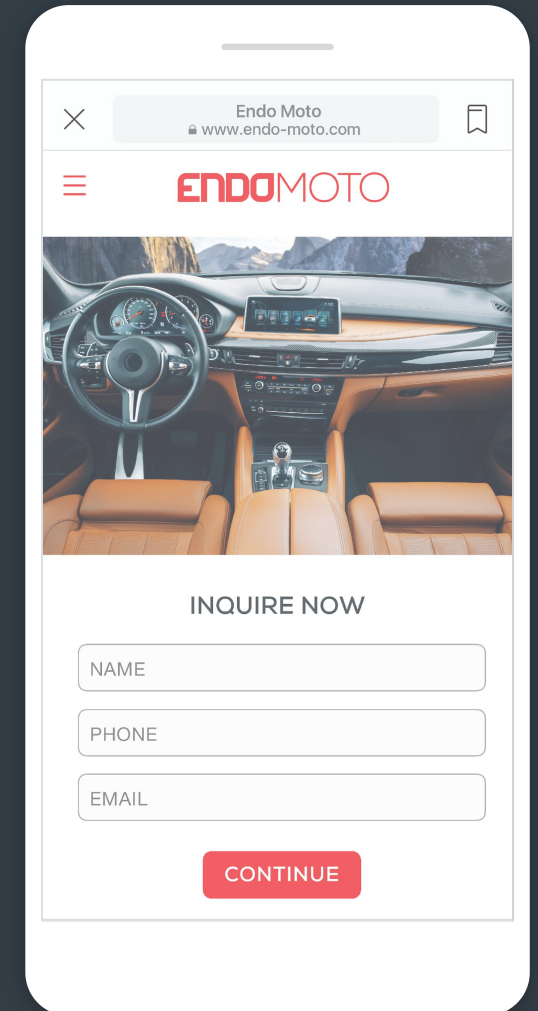
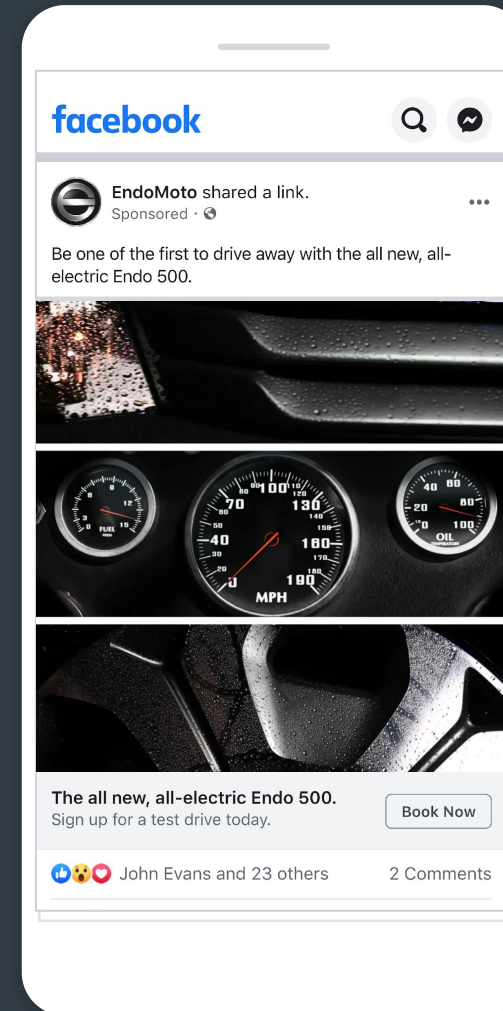
- ✓ Loads instantly
- ✓ Follow up with your lead through CRM integration
- ✓ Pre-filled forms



Website conversions use the forms that are hosted on your site

KEY CONSIDERATIONS:

- 01 Upcoming regulatory and technology changes
- 02 Form submission and data collection
- 03 Customization and mobile-first experience

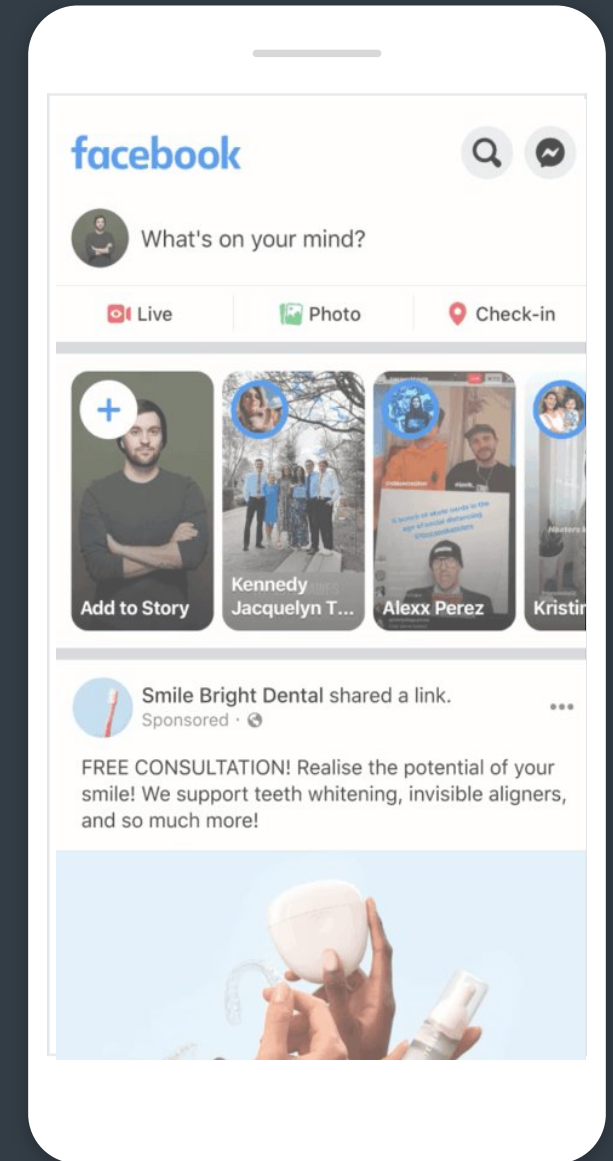


WEBSITE CONVERSIONS
(website forms)

Call Ads can help people contact your business **right here, right now**

- ✔ **Connect instantly with prospective customers**
Offer customers a real-time connection point over the phone.
- ✔ **Run call ads that are flexible and convenient**
Schedule call ads to run only when your business is open and available to take calls.
- ✔ **Use call destinations to help figure out where you can best handle demand**
It's simple. Just set the phone number you want to route calls to.

Call ads using Lead Generation objective can only appear on Facebook and will not be shown on Instagram. (Facebook internal data, March 2023, based on 10 advertisers running call ads for 2 weeks between October and November 2023.)



CALL ADS

Lead generation in Messenger can help you **find and qualify leads** more easily

Create customizable experiences



Use customizable Messenger templates to get the information that's most relevant to your business.

Streamline your lead qualification



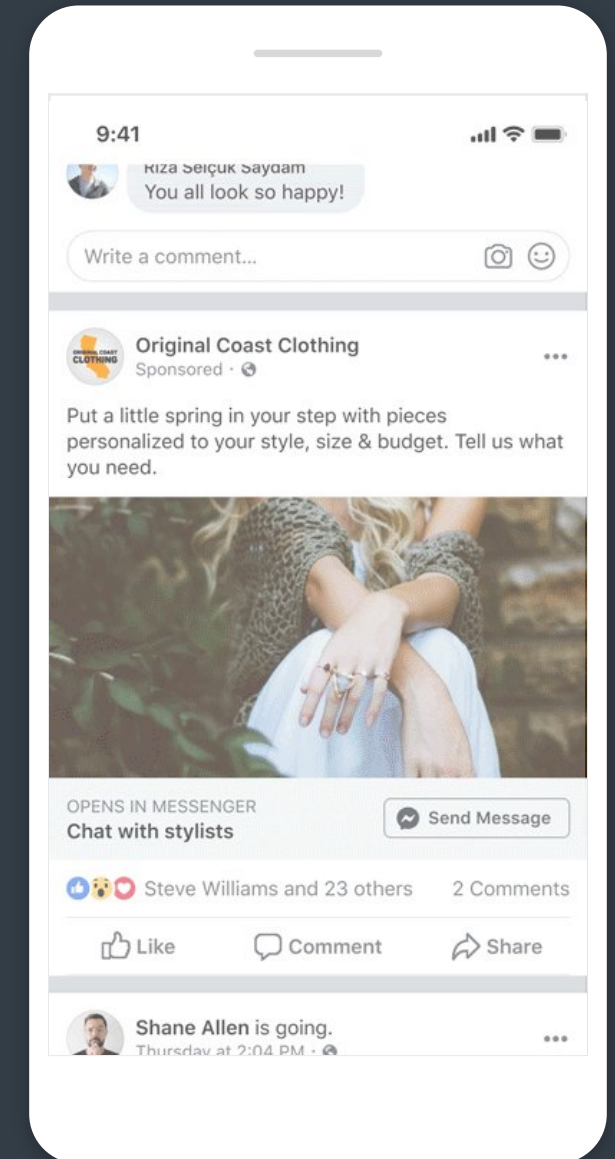
Create a quick and easy customer experience in Messenger to drive completion rates and generate higher-quality leads.

Follow up with leads as is most convenient for you



After the automated chat, determine how you follow up — by routing to a live agent, email, SMS or through phone calls. You can also add these leads to your CRM.

Call ads using Lead Generation objective can only appear on Facebook and will not be shown on Instagram. (Facebook internal data, March 2023, based on 10 advertisers running call ads for 2 weeks between October and November 2023.)



**LEAD GENERATION IN
MESSENGER**



New optimization: Generate quality leads at scale

- Use Meta's reach and optimization tools to help generate quality leads
- Help enhance quality through direct CRM integration and customization features

Meta commits to helping you find the highest quality leads in these areas:

01 New campaign optimizations

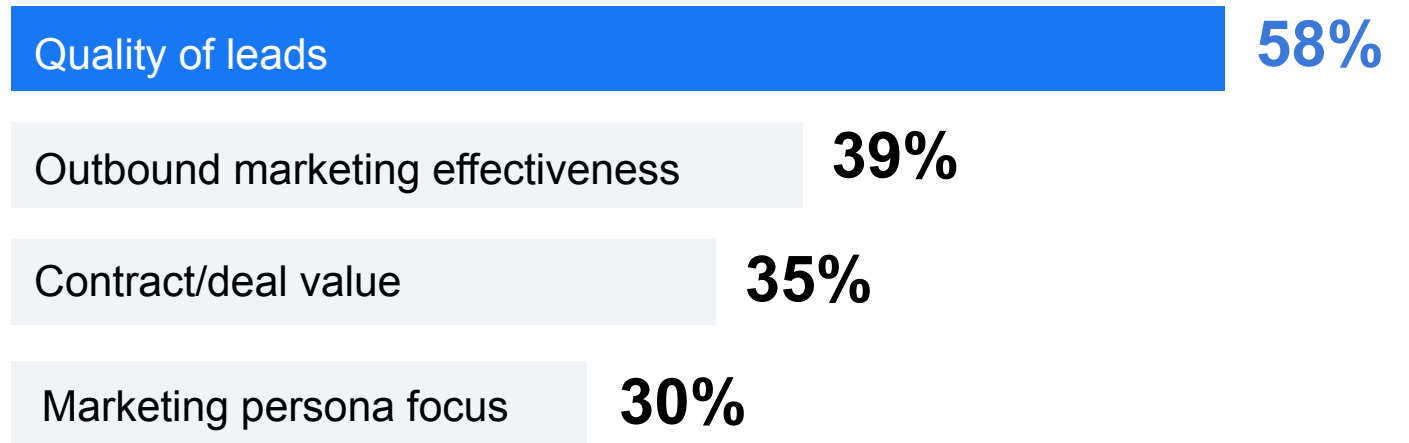
Conversion Leads optimization in Lead Ads
Calls optimization in Call Ads

02 User experiences to better qualify leads

Higher intent Instant Forms in Lead Ads
Real-time connection via Call Ads
Lead qualification in Messenger

Marketers cite lead quality is the top metric in measuring business success

Important metrics for business success:

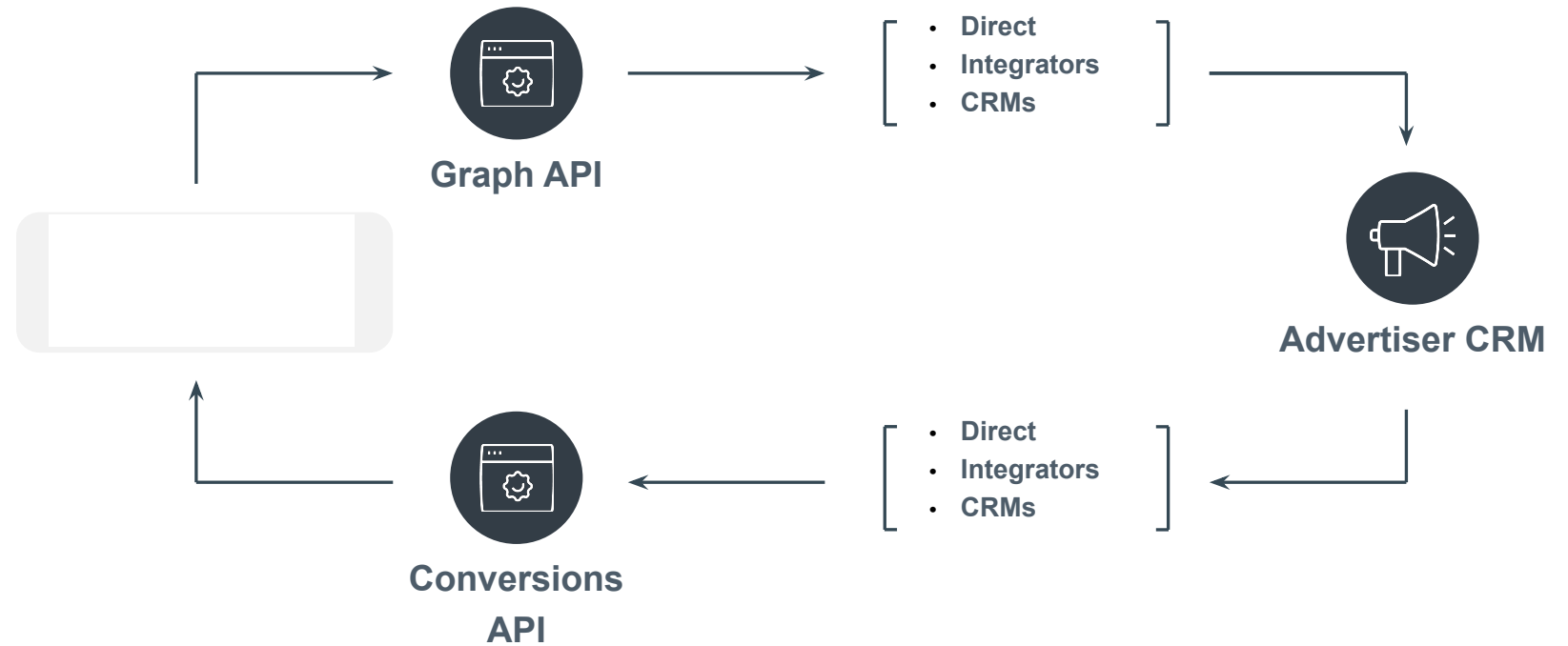


Meta optimizes for leads most likely to convert by accessing down-funnel data with CRM integration

CRM integration

enables

- Conversion Leads to help optimize for lead quality
- Utilization of lower-funnel actions to help optimize for the success of leads

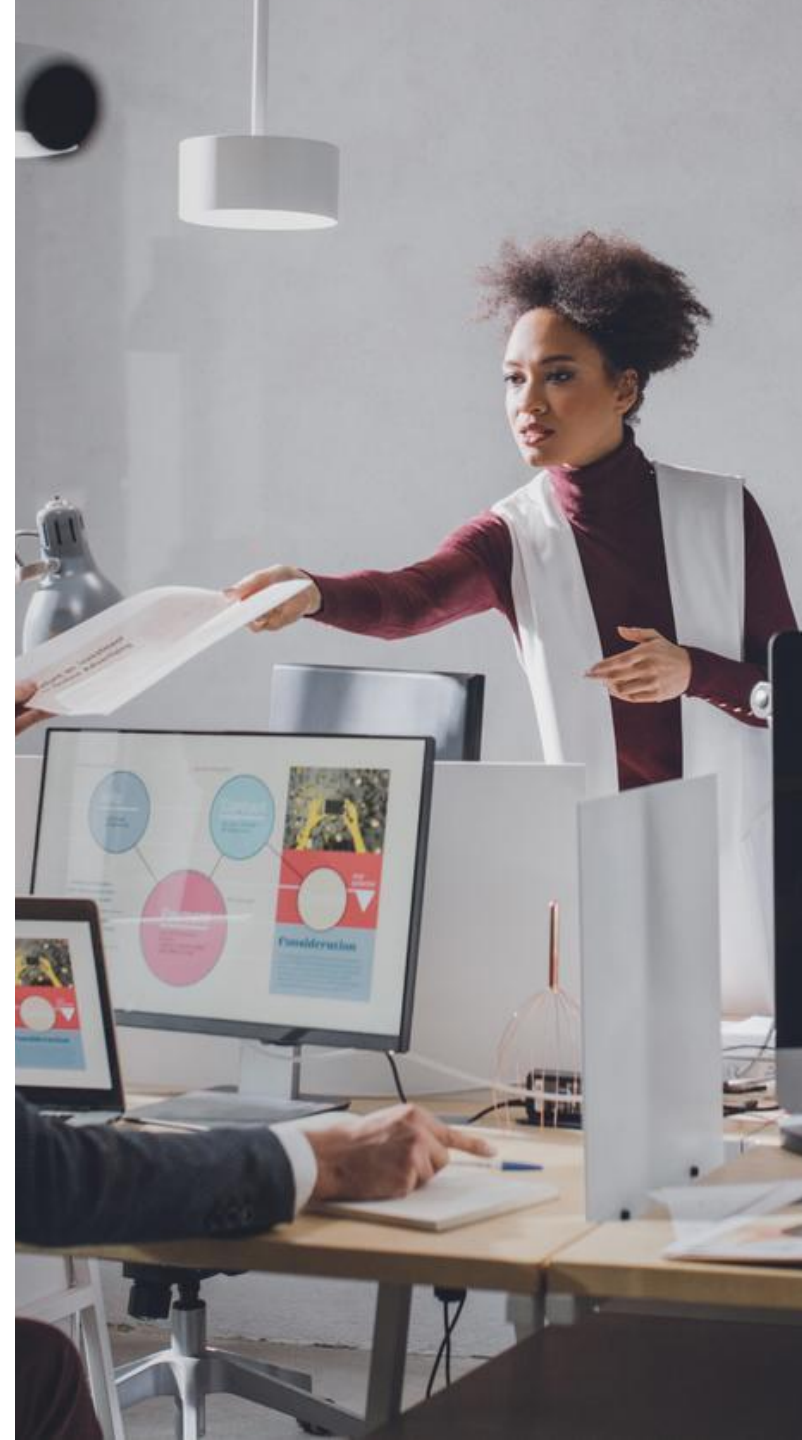


Integrate your CRM with Conversions API for better performance

- ✔ **Measure your customer actions in more ways**
Share delayed values, user scores or lead scores for optimization within our other business tools for further visibility into your customer's full journey.
- ✔ **Improve information accuracy to help lower cost per lead/conversion**
Lead information is sent for targeting, measurement and optimization when integrated with the Meta Pixel.
- ✔ **Control the data you share with confidence**
Conversions API is designed to offer more control over what/when data is shared (when implemented outside of the Meta Pixel).

Conversions API lets you share key web and offline events, or customer actions, directly from your server to Facebook's.

Conversions API works with your Facebook pixel to help improve the performance and measurement of your Facebook ad campaigns.



How advertisers can use the Conversion Leads Optimization

2 ways to use the Conversion Leads Optimization

1. **Integrate your CRM via Conversions API and Select Conversion Leads Optimization in Ads Manager**

Integration is recommended for all advertisers, but advertisers generating >250 leads / month may see the greatest value in integration.

2. **Select Conversion Leads Optimization in Ads Manager (no CRM integration)**

CRM integration is not a requirement to use the new quality optimization goal. Even advertisers without a CRM integration should see improvement in quality of leads generated.

Best Practices for Conversion Leads

1. **Integrate CRM via CAPI**

Share information from your CRM system to help us reach higher-quality leads in your audience.

2. **Configure your sales funnel**

After you connect your CRM system, specify the stage at which you think a lead should be considered high-quality. We'll deliver your ad to the people most likely to reach that stage.

Integrate your CRM directly or through partner solutions

- Direct integration
- Lead Ads partner integrations



Here's how to connect your CRM directly to Meta

- 01 Create a CRM pixel
- 02 Connect your CRM with Conversions API
- 03 Configure your sales funnel
- 04 Verify your setup

01

Create a CRM pixel

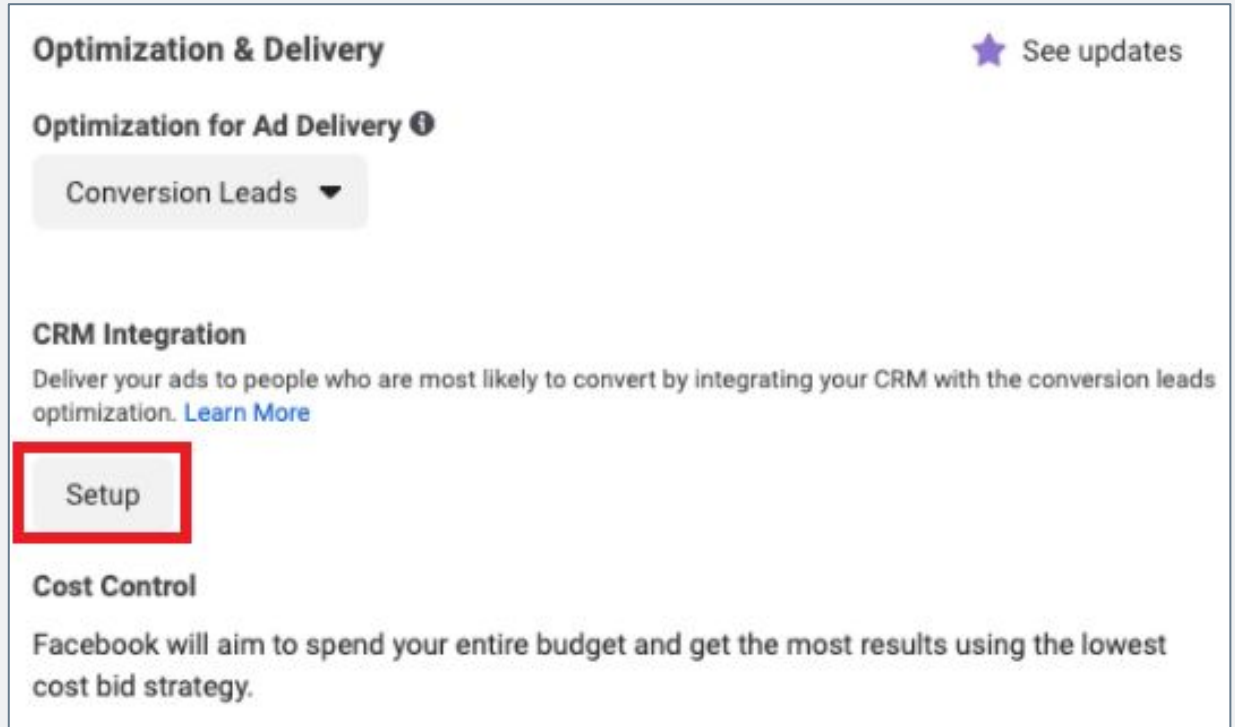
- 1 Create CRM pixel with **Ads Manager** or **Events Manager**
- 2 Direct Integration

01 CREATE A CRM PIXEL

1 2

Ads Manager

At Ad Set level, select **Setup** under the **Optimization & Delivery** section.



Optimization & Delivery ★ See updates

Optimization for Ad Delivery ⓘ

Conversion Leads ▼

CRM Integration
Deliver your ads to people who are most likely to convert by integrating your CRM with the conversion leads optimization. [Learn More](#)

Setup

Cost Control
Facebook will aim to spend your entire budget and get the most results using the lowest cost bid strategy.

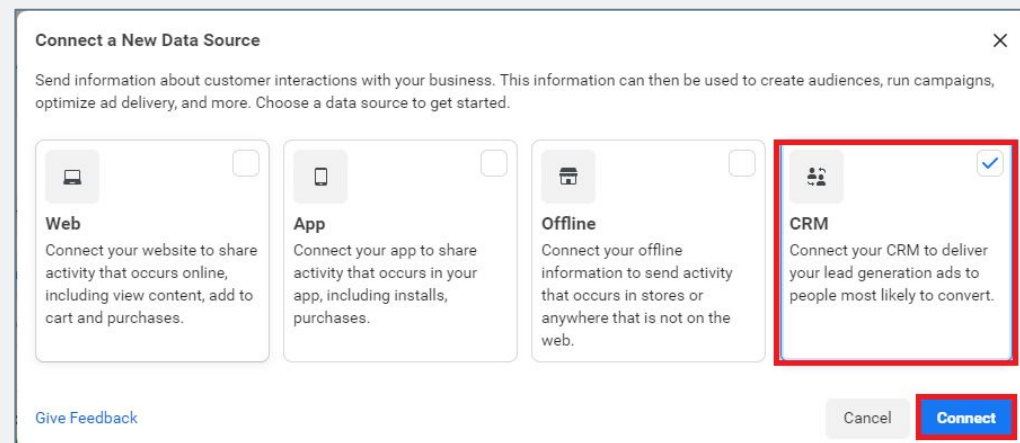
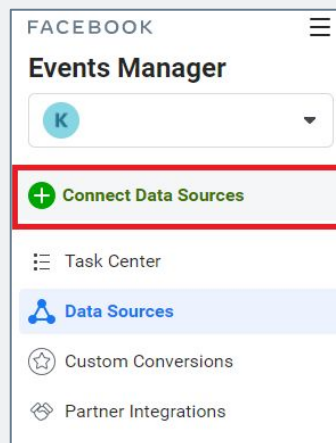
01 CREATE A CRM PIXEL

1 2

Events Manager

Select **Connect Data Sources** to connect a new data source.

Select **CRM** and then **Connect**.



01 CREATE A CRM PIXEL

1

2


Direct Integration

Select **Install code manually**.


Your developer will need Business Manager admin access to complete the integration.

Step 2: Connect your CRM to our Conversions API

Choose how you'd like to implement the Conversions API.


 **Manually implementation**
Follow our Conversion API implementation guide to connect your CRM.

Install code manually

 **Use a plugin**
If you use one of our partner CRMs, integrate quickly and easily using a plugin.


Use a plugin

[Give Feedback](#)

 **Send instructions to your developer**
We'll email your developer personalized instructions for integrating your CRM with the Conversions API. You'll be able to see their progress in Events Manager.

To:

Send me a copy of this email

 **Connect the API yourself**
If you have access to your CRM server and experience writing code, you can get started right away.

Open Implementation Guide

[Give Feedback](#) [Back](#) **Send Email**

*This is required to notify the system you are moving onto the next phase. Please do not skip this step even if you do not need the implementation guide.

02

Connect your CRM with CAPI

- 1 Generate an access token
- 2 Build a payload
- 3 Validate your CRM Data (optional)
- 4 Send and Verify CRM events



Generate an Access Token

Gain access to the Conversion
API

Generate an Access Token

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

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

Generate Access Token

02 CONNECT YOUR CRM WITH CAPI

1 2 3 4

Build a payload

Send your CRM data with all the required parameters

```
{
  "event_name": "my lead stage",
  "event_time": 1617693833,
  "user_data": {
    "lead_id": 1234567890123456
  },
  "action_source": "system_generated",
  "custom_data": {
    "lead_event_source": "Salesforce",
    "event_source": "crm"
  }
}
```

lead_id: 15 or 16 digit ID from your Facebook downloaded leads

event_name: Name of your down-funnel CRM event

event_time: Can be up to 7 days before you send an event to Facebook

action_source: Must be set to **system_generated**

lead_event_source: The name of your CRM

event_source: Must be set to **crm**

Do not hash

*Events missing these parameters will not be processed



Test your CRM event (optional)

Send a CRM event with the `test_event_code` attached to verify it's working

Overview **Test Events** Diagnostics History Settings

Test Your Events

Check that your events are received correctly. [Learn More](#)

Test Event Instructions

Test Browser Events

Interact with your website to test whether the events sent from a web browser are received correctly. For example, if you want to test a purchase event, go to your website and click a "Purchase" button. If the purchase event is received, it'll appear on this screen.

[Open Website](#)

Test Server Events

Follow these steps on your terminal or in the [Graph API Explorer](#) to start seeing activity.

1. Within your server's payload, add the 'test_event_code' to the event you want to test.

```
TEST46561
```

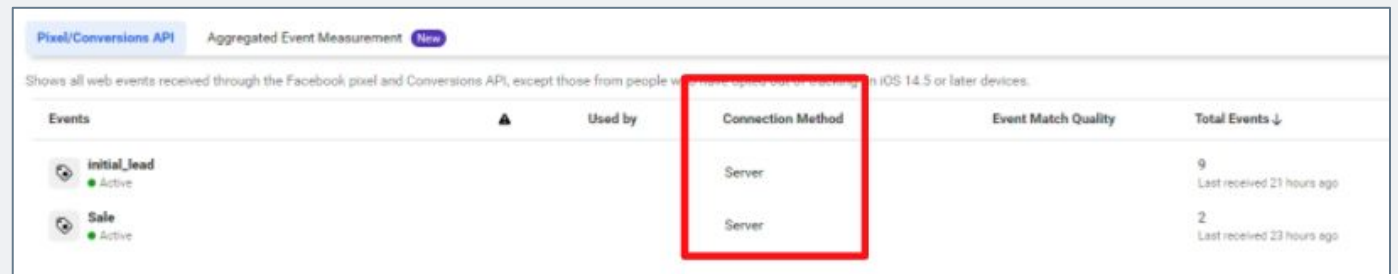
2. Copy and paste the test code below as a value for your test_event_code parameter. For example: {test_event_code: TEST46561}
3. Send the payload. If the payload is received correctly, it'll appear on this screen.

02 CONNECT YOUR CRM WITH CAPI

1 2 3 4

Send and Verify CRM events

1. Send in the lead_id rather than PII for matching.
2. Make sure to send all stages as they are moving down the funnel.
3. Send data at least once a day.
4. To speed up the funnel analysis, you can backfill your data for up to 7 days in the past.



Pixel/Conversions API Aggregated Event Measurement New

Shows all web events received through the Facebook pixel and Conversions API, except those from people who have opted out of tracking on iOS 14.5 or later devices.

Events	Used by	Connection Method	Event Match Quality	Total Events ↓
initial_lead Active		Server		9 Last received 21 hours ago
Sale Active		Server		2 Last received 23 hours ago

*Remember to use a valid lead_id in your payloads for events to appear

03

Configure your sales funnel

- 1 Clean up events
- 2 Remove negative events
- 3 Configure sales funnel sequence
- 4 Set optimization target
- 5 Edit sales funnel (optional)

03 CONFIGURE YOUR SALES FUNNEL

Clean up events

Uncheck uploaded events that are not part of your sales funnel

These may include test events or events accidentally uploaded from another system.

< Conversion Leads Optimization Setup

- Overview
- Configure sales funnel
- Event cleanup**
- Disqualifying events
- Sales funnel sequence
- Optimization target

Event cleanup • Optional

Unselect any events that aren't CRM stages or aren't related to your sales funnel. Leave events checked that represent a lead leaving your sales funnel (we'll cover that next).

- Appointment
- Disqualified
- Call
- Purchase_lead
- lead_stage1

03 CONFIGURE YOUR SALES FUNNEL



Remove negative events

Uncheck events that indicate a negative lead

These could be leads that received a phone call but decide to not convert into a sale.

Conversion Leads Optimization Setup

- ✓ Overview
- ✓ Configure sales funnel
- ✓ Event cleanup
- 1 Disqualifying events**
- Sales funnel sequence
- Optimization target

Disqualifying events

Unselect any events that indicate a lead has left your sales funnel (e.g., lost to competitor).

- Appointment
- Disqualified
- Call
- Purchase_lead

03 CONFIGURE YOUR SALES FUNNEL



Configure sales funnel sequence

Organize your events to reflect the natural order of your sales funnel

Conversion Leads Optimization Setup

- ✓ Overview
- ✓ Configure sales funnel
- ✓ Event cleanup
- ✓ Disqualifying events
- Sales funnel sequence**
- Optimization target

Sales funnel sequence

Put these events in order of how a lead moves through your sales funnel from start to finish, with the earliest stage at the top.

- ⋮ Appointment
- ⋮ Call
- ⋮ Purchase_lead

03 CONFIGURE YOUR SALES FUNNEL



Set optimization target

Select the stage you would like to optimize for

< Conversion Leads Optimization Setup

- ✓ Overview
- ✓ Configure sales funnel
- ✓ Event cleanup
- ✓ Disqualifying events
- ✓ Sales funnel sequence
- Optimization target**

Optimization target

Select the earliest stage of your sales funnel you want to optimize for. We'll deliver your ad to people most likely to reach that stage. No matter which stage you choose, we strive to optimize your ad's overall performance.

- Appointment
- Call
- Purchase_lead

03 CONFIGURE YOUR SALES FUNNEL



Edit sales funnel (optional)

Select the stage you would like to optimize for

Conversion Leads Optimization

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

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

Edit Sales Funnel

Manage API

04

Create a Lead Ads campaign

- 1 Create new campaign
- 2 Select Lead Method
- 3 Select Optimization for Ad Delivery
- 4 Verify your setup

04 CREATE A LEAD ADS CAMPAIGN

1 2 3 4

Create new campaign


In Ad Set level, Select the **Buying Type Auction** and choose the campaign objective **Lead Generation**.

Create New Campaign

Buying Type
Auction

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	


Lead generation
Collect leads for your business or brand.

Name Your Campaign • Optional

Cancel Continue

04 CREATE A LEAD ADS CAMPAIGN

1 2 3 4

Select lead method

In Ad Set level, select **Instant Forms** under the **Lead Method** section.

The screenshot shows the Facebook Ads interface for creating a new ad set. The breadcrumb trail at the top reads: 'Lead Gen > New Ad Set > 1 Ad'. In the top right corner, there are 'Edit' and 'Review' buttons. The main content area is divided into two sections:

- Ad Set Name:** A text input field containing 'New Ad Set' and a 'Create Template' link to its right.
- Lead method:** A section titled 'How do you want to connect with people?' with three radio button options:
 - Instant Forms:** Selected (radio button is filled with blue). Description: 'Let people submit a form to become leads.' This option is highlighted with a red rectangular box.
 - Automated Chat:** Description: 'Let people message your business to become leads.'
 - Calls:** Description: 'Let people call your business to become leads.'

04 CREATE A LEAD ADS CAMPAIGN



Select optimization for ad delivery

In Ad Set level, select **Conversion Leads** under the **Optimization & Delivery** section.

Optimization & Delivery

Optimization for Ad Delivery

Leads ▼

Leads

We'll deliver your ads to help you get the most leads possible.

Conversion Leads

We'll deliver your ads to help you get leads that are most likely to convert.

the most leads using the lowest

04 CREATE A LEAD ADS CAMPAIGN



Verify your setup

Under the **Optimization & Delivery** section, it will show the CRM pixel for optimization.

Optimization & Delivery

★ See what's new

Optimization for Ad Delivery ⓘ

Conversion Leads ▼

CRM Integration

Your ad delivery is being optimized for lead conversion rate.

CRM Integration via CAPI

Pixel ID: 530224608013046

Cost Control

Facebook will aim to spend your entire budget and get the most results using the lowest cost bid strategy.

*The CRM Integration is not a requirement to run campaigns with the “Conversion Leads” goal, however you will see better results if CRM is fully integrated.

Measurement



Measure the success of your lead strategy

Test through iteration. Find your best strategy for generating leads by constantly evaluating. Visit the Experiments tool to set up an A/B test.

Learn more about the measurement frameworks listed below.

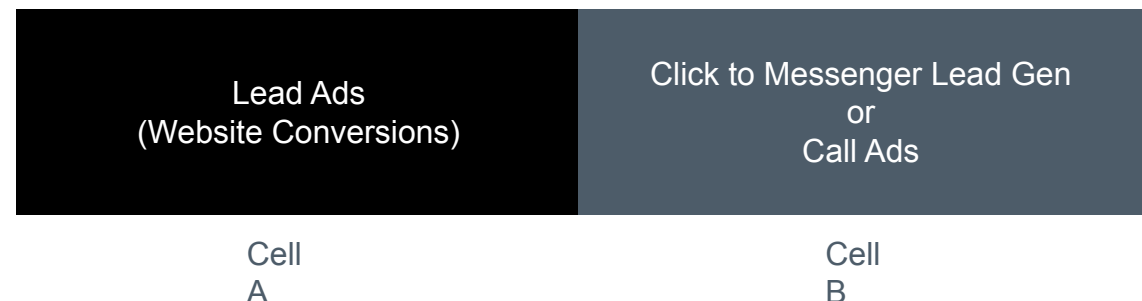
TEST OPTION 1

Form Focused
Clients



TEST OPTION 2

Message or Call Focused
Clients



Tell your own Success Story

Show how you've helped clients with Lead Ads. Here's an example to use as a guide.

Your client's logo

Getting More Qualified Lead Info To Drive Conversions

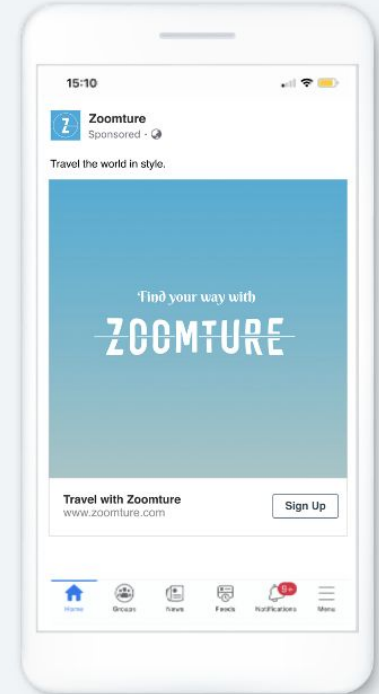
Company A sought more in-depth information from potential customers who showed interest in their products but didn't fill out the contact forms completely. Lead Ads helped streamline this process by pre-populating forms across different channels of communication and direct CRM integration. After one month of using Lead Ads, Company A saw a X% rise in revenue and a X point lift in ad recall.

55% increase in customer moving towards purchases through Lead Ads

40% lower cost per qualified lead

"Lead Ads have made our lives so much easier. The conversations we've initiated with new customers go a lot smoother. It's like we've overcome some major barriers in direct communication with our audience."

[Name] Digital Marketing Lead, Company A



Find out how Meta's Lead
Ads can help your
business

Let's chat!



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