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Meta Advertising Setup

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Preamble

This SOP covers the three-level structure of Meta Ads (Facebook/Instagram):

- Campaign Level,
- Ad Set Level, and
- Ad Level.

Each level controls different aspects of your advertising strategy. Meta advertising offers unparalleled reach for professional services targeting decision-makers across government, defence, and corporate sectors. This Standard Operating Procedure provides a comprehensive framework for creating, launching, and optimising Meta advertising campaigns through Facebook and Instagram platforms.

Meta's three-level advertising structure: Campaign, Ad Set, and Ad, enables precise control over objectives, targeting, budget allocation, and creative execution. Understanding this hierarchy is critical for achieving measurable return on investment and converting advertising spend into qualified discovery calls and client engagements.

This SOP addresses the unique challenges faced by professional service providers: reaching niche audiences, demonstrating credibility, and converting cold traffic into warm leads. Unlike consumer-focused advertising, B2B and B2G campaigns require strategic targeting, professional messaging, and clear pathways to consultation.

The document is structured to guide users through each level of campaign creation, from defining business objectives and allocating budgets at the Campaign level, to selecting audiences and placements at the Ad Set level, to crafting compelling creative assets at the Ad level. Each section includes step-by-step instructions, recommended settings, and best practices derived from industry standards and platform requirements.

This SOP uses a practical example: a $600 budget allocated over 20 days targeting government and defence decision-makers for documentation services. The example demonstrates budget allocation, audience segmentation, and creative strategy applicable to similar professional service campaigns.

Users of this SOP should have basic familiarity with Meta Business Suite and access to Meta Ads Manager. The document assumes campaigns will drive leads through discovery call bookings or consultation requests, though the framework applies to other conversion objectives including downloads, webinar registrations, or content engagement.

By following this SOP, organisations can launch campaigns with confidence, minimise common mistakes, and establish systematic processes for testing, optimisation, and performance measurement. The goal is clarity, consistency, and measurable results.

Executive Summary

This Standard Operating Procedure outlines the complete process for creating and managing Meta advertising campaigns across Facebook and Instagram. It provides structured guidance for professional service providers targeting government, defence, and corporate decision-makers.

Campaign Structure
Meta advertising operates through three hierarchical levels: Campaign (defines objectives and total budget), Ad Set (controls targeting, placements, and budget allocation), and Ad (delivers creative assets and messaging). Understanding this structure is essential for strategic campaign management and performance optimisation.

Budget and Timeline
The SOP demonstrates a practical $600 campaign allocated over 20 days at $30 daily spend. This budget supports meaningful testing across multiple ad sets while maintaining sufficient daily spend for Meta's algorithm to optimise delivery. Budget allocation examples include primary audience targeting ($300), retargeting ($200), and lookalike audiences ($100).

Targeting Strategy
Effective campaigns require precise audience definition. The SOP covers location targeting (Australia, specific states), demographic selection (age 35-65 for decision-makers), and detailed targeting using interests, behaviours, and job titles relevant to government and corporate sectors. Placement recommendations prioritise Facebook and Instagram Feed for professional audiences.

Creative Development
Ad creation guidance includes format selection (single image, video, carousel), media specifications (1200x628px images, 15-60 second videos), copywriting best practices (125-character primary text, 30-character headlines), and call-to-action optimisation. All creative elements should emphasise benefits, professional credibility, and clear pathways to consultation.

Optimisation Framework
The SOP establishes key performance indicators including Cost Per Lead ($10-20 target), Click-Through Rate (1-3% target), and Conversion Rate (5-10% target). A/B testing protocols, monitoring schedules, and optimisation actions ensure campaigns improve over time. Deliverables

Users completing this SOP will launch campaigns with appropriate objectives, targeting, budget allocation, and creative assets. The Quick Reference Guide provides rapid access to critical settings and workflows for ongoing campaign management.

LEVEL 1: CAMPAIGN SETUP

Purpose

Campaigns define your primary business objective and budget allocation.

Let's explore this SOP with a $600 budget to be spent over 20 days, with a minimum $30 per day Ad spend

Step-by-Step Setup

1. Access Meta Ads Manager

- Go to business.facebook.com
- Click "Ads Manager" in the left menu
- Click "Create" button (top left)

2. Select Campaign Objective Choose based on your goal:

- **Awareness**: Reach, impressions (top of funnel)
- **Consideration**: Traffic, engagement, video views, leads (middle funnel)
- **Conversion**: Conversions, catalogue sales, store visits (bottom funnel)

For this example: Select "Leads" to capture discovery call bookings

3. Name Your Campaign

- Format: `[Date]-[Objective]-[Audience]-[Budget]`
- Example: `2025-12-Leads-GovDefence-$600`

4. Set Campaign Budget

- Daily budget: $30/day (20 day campaign)
- Lifetime budget: $600 total spend over campaign duration
- *Recommendation: 20-day campaign at $30/day for optimal testing and data collection*

5. Campaign Settings

- **Buying type**: Auction (standard)
- **Special ad categories**: None (unless B2B compliance required)
- **Conversion API**: Enable if using Wix/custom tracking

6. Review & Create

- Click "Create Campaign"
- You'll move to Ad Set setup

LEVEL 2: AD SET SETUP

Purpose

Ad Sets define targeting, placement, and budget allocation within a campaign.

Step-by-Step Setup

1. Name Your Ad Set

- Format: `[Audience]-[Placement]-[Budget]`
- Example: `GovDefence-LinkedIn+Facebook-$300`

2. Daily Budget

- Allocate from campaign budget
- Example: If campaign is $600 over 20 days ($30/day), allocate $300 to Ad Set 1

3. Schedule

- Start date: Today or future date
- End date: Campaign end date
- Run continuously or set specific days/times
- *Recommendation: Run continuously; optimise day/time later*

4. Targeting (Critical for ROI)

Audience Selection:

- **Location**: Australia (or specific states: ACT, NSW, VIC)
- **Age**: 35-65 (Government/Defence decision-makers)
- **Gender**: All
- **Languages**: English

Detailed Targeting:

- Add interests: "Government", "Project Management", "Compliance", "Business Strategy"
- Add behaviours: "Decision makers", "Business owners", "Managers"
- Add job titles: "Project Manager", "Compliance Officer", "Government Official"

Exclusions:

- Exclude competitors' audiences
- Exclude prior converters (if retargeting, use separate ad set)

5. Placements

- **Automatic placements**: Let Meta optimise (recommended for beginners)
- **Manual placements**: Select specific platforms
    - o Facebook Feed
    - o Instagram Feed
    - o Audience Network
    - o Messenger
- *Recommendation: Start with Facebook + Instagram Feed only*

6. Optimisation & Delivery

- **Optimisation for**: Leads (or Conversions if tracking calls)

- **Conversion window**: 7 days
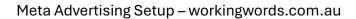- **Delivery**: Standard (Meta optimises throughout day)

7. Review & Continue

- Click "Continue to Ad" to move to Ad Level

BUDGET ALLOCATION EXAMPLE (20 days)

Level	Component	Budget	Notes
Campaign	Total	$600	Monthly test budget
Ad Set 1	**Gov/Defence LinkedIn**	**$300**	**Primary audience**
Ad Set 2	Retargeting	$200	Website visitors
Ad Set 3	Lookalike	$100	Similar to converters

Repeat this process for Ad Set 2 and Ad Set 3 using different Targeting and Placements.

LEVEL 3: AD SETUP

Purpose

Ads are the creative assets (images, copy, CTA) users see.

Step-by-Step Setup

1. Ad Format Selection Choose format based on objective:

- **Single Image Ad**: One image + headline + copy (recommended for leads)
- **Carousel Ad**: Multiple images, swipeable
- **Video Ad**: Video + copy
- **Collection Ad**: Multiple products/services

For your website: Use Single Image Ad or Video Ad

2. Media Upload

- **Image**: 1200x628px (1.91:1 ratio)
    - Use professional headshot or documentation visual
    - Include text overlay: "Book Your Free Audit" or "Clarity. Confidence. Impact."
- **Video**: 15-60 seconds
    - Hook: First 3 seconds critical
    - CTA: Clear call-to-action at end

3. Primary Text (Ad Copy)

- **Character limit**: 125 characters
- **Best practice**: Lead with benefit, not features
- **Example**: "Government documentation that drives decisions. Book a free 15-min audit."
- **Tone**: Professional, benefit-focused, direct

4. Headline

- **Character limit**: 30 characters
- **Best practice**: Action-oriented, specific
- **Example**: "Free Documentation Audit"

5. Description

- **Character limit**: 30 characters
- **Best practice**: Reinforce headline
- **Example**: "For Government Projects"

6. Call-to-Action Button

- **Button type**: "Learn More" or "Sign Up" (for leads)
- **Button text**: "Book a Call" or "Get Audit"
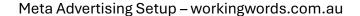
7. Landing Page / Destination

- **Website URL**: Link to Calendly booking page or lead form
- **Best practice**: Use UTM parameters for tracking
- **Example**: `https://calendly.com/`*your-name*`?utm_source=meta&utm_medium=cpc&utm_campaign=gov-defence-leads`

8. Tracking & Pixels

- Ensure Meta Pixel is installed on your website
- Select conversion event: "Lead" or "ViewContent"

9. Review & Publish

- Review all copy, images, targeting
- Click "Publish" to launch ad

TESTING & OPTIMISATION

A/B Testing (Ad Set Level)

- Create 2-3 ad sets with same targeting, different creatives
- Run for 7-14 days minimum
- Measure: Cost per Lead, Click-through Rate (CTR)

Key Metrics to Monitor

- Cost Per Result (CPL): Target $10-20 per lead
- Click-through Rate (CTR): Target 1-3%
- Conversion Rate: Target 5-10% (leads to calls)
- Return on Ad Spend (ROAS): Target 3:1 or higher

Optimisation Actions

- High CPL: Adjust targeting, improve creative
- Low CTR: Refresh ad copy/image every 2 weeks
- Low conversion: Improve landing page, simplify form

BUDGET ALLOCATION EXAMPLE (20 days)

Level	Component	Budget	Notes
Campaign	Total	$600	Monthly test budget
Ad Set 1	Gov/Defence LinkedIn	$300	Primary audience
Ad Set 2	Retargeting	$200	Website visitors
Ad Set 3	Lookalike	$100	Similar to converters

COMMON MISTAKES TO AVOID

- Vague targeting: Too broad = high cost, low quality
- Poor creative: Blurry images, unclear copy = low CTR
- Wrong landing page: Complex forms = low conversion
- Insufficient budget: Under $10/day = insufficient data
- No tracking: Can't measure ROI without pixels/UTM codes

NEXT STEPS

1. Set up Meta Pixel with your website address
2. Create Calendly booking page with UTM tracking
3. Design 2-3 ad creatives (images + copy)
4. Launch first campaign with $600 budget
5. Monitor daily; optimise after 7 days

Quick Reference Guide

<u>LEVEL 1: CAMPAIGN SETUP</u>

1. Access Meta Ads Manager

2. Select Campaign Objective

- Awareness
- Consideration
- Conversion

3. Name Your Campaign

- Format

4. Set Campaign Budget

- Daily budget
- Lifetime budget

5. Campaign Settings

- Buying type)
- Special ad categories
- Conversion API

6. Review & Create

- Click "Create Campaign"

<u>LEVEL 2: AD SET SETUP</u>

1. Name Your Ad Set

- Format

2. Daily Budget

- Allocate from campaign budget

3. Schedule

- Start date
- End date
- Run continuously or set specific days/times

4. Targeting (Critical for ROI)

Audience Selection:

- Location
- Age
- Gender
- Languages

Detailed Targeting:

- Add interests
- Add behaviours
- Add job titles

Exclusions:
- Exclude competitors' audiences
- Exclude prior converters

5. Placements
- Automatic placements
- Manual placements: Select specific platforms
  - Facebook Feed
  - Instagram Feed
  - Audience Network
  - Messenger

6. Optimisation & Delivery
- Optimisation
- Conversion window
- Delivery

7. Review & Continue

LEVEL 3: AD SETUP

1. Ad Format Selection
- Single Image Ad
- Carousel Ad
- Video Ad
- Collection Ad

2. Media Upload
- Image
- Video

3. Primary Text (Ad Copy)
- Character limit
- Best practice
- Example
- Tone

4. Headline
- Character limit
- Best practice
- Example

5. Description
- Character limit
- Best practice

6. Call-to-Action Button
- Button type

- Button text

7. Landing Page / Destination
- Website URL
- Best practice

8. Tracking & Pixels
- Ensure Meta Pixel is installed on your website
- Select conversion event

9. Review & Publish
- Review all copy, images, targeting
- Click "Publish" to launch ad