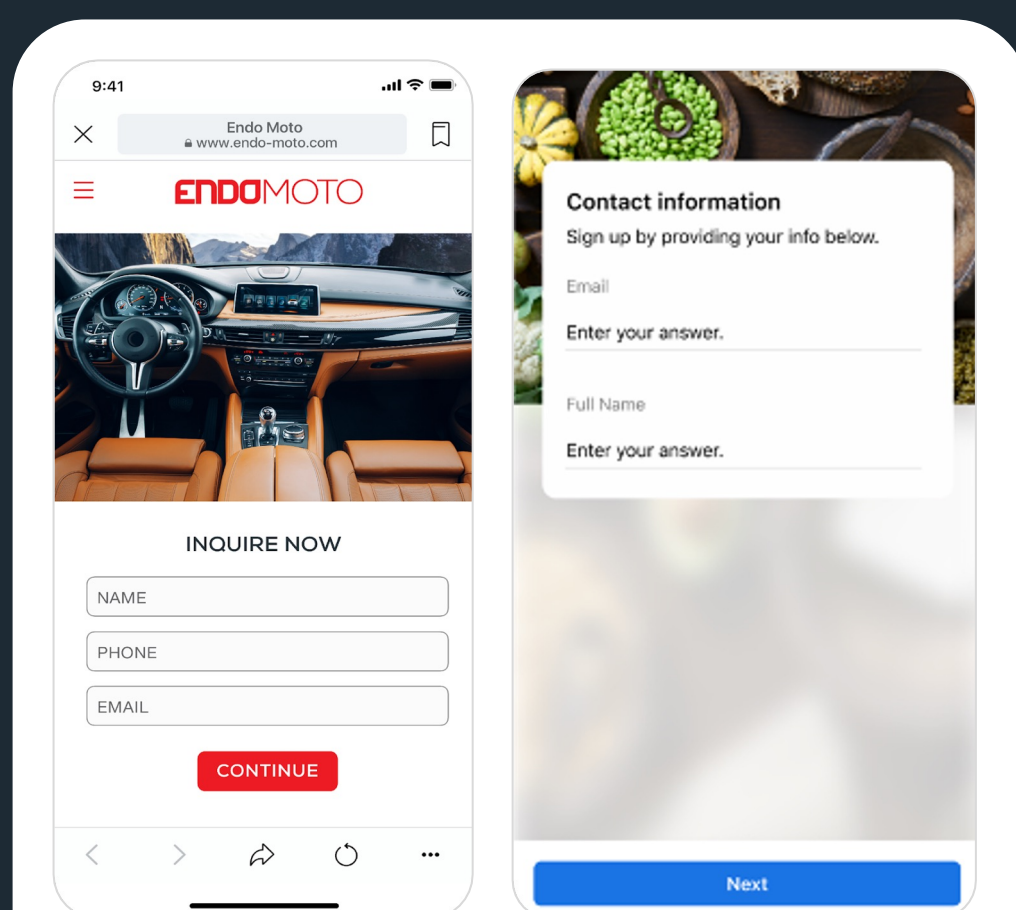


Generate high quality leads across Meta technologies



Lead generation on Meta happens in an environment where people are open to discovery and businesses can both create and respond to customer demand.

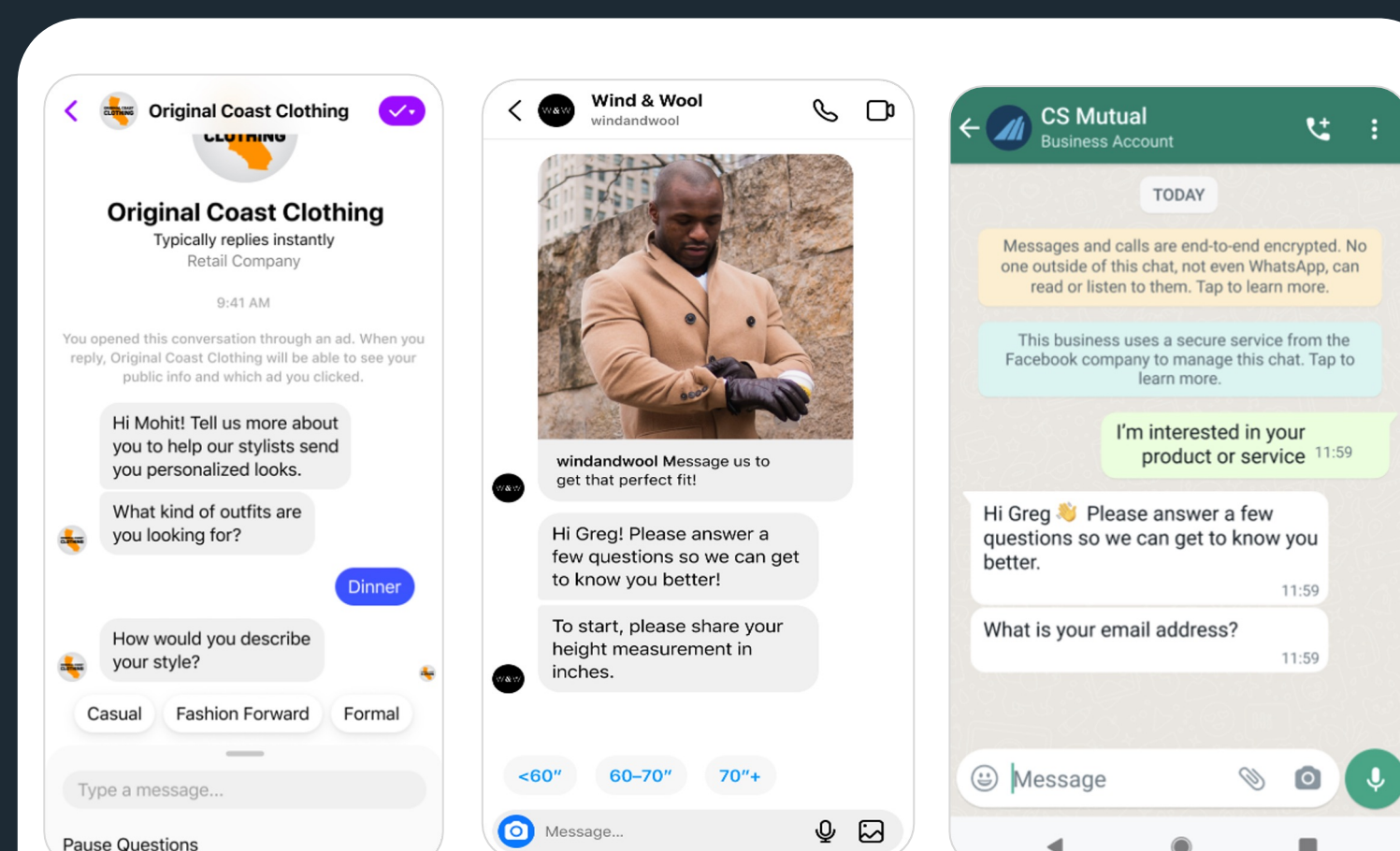
FORMS



Website forms

Instant forms

MESSAGING

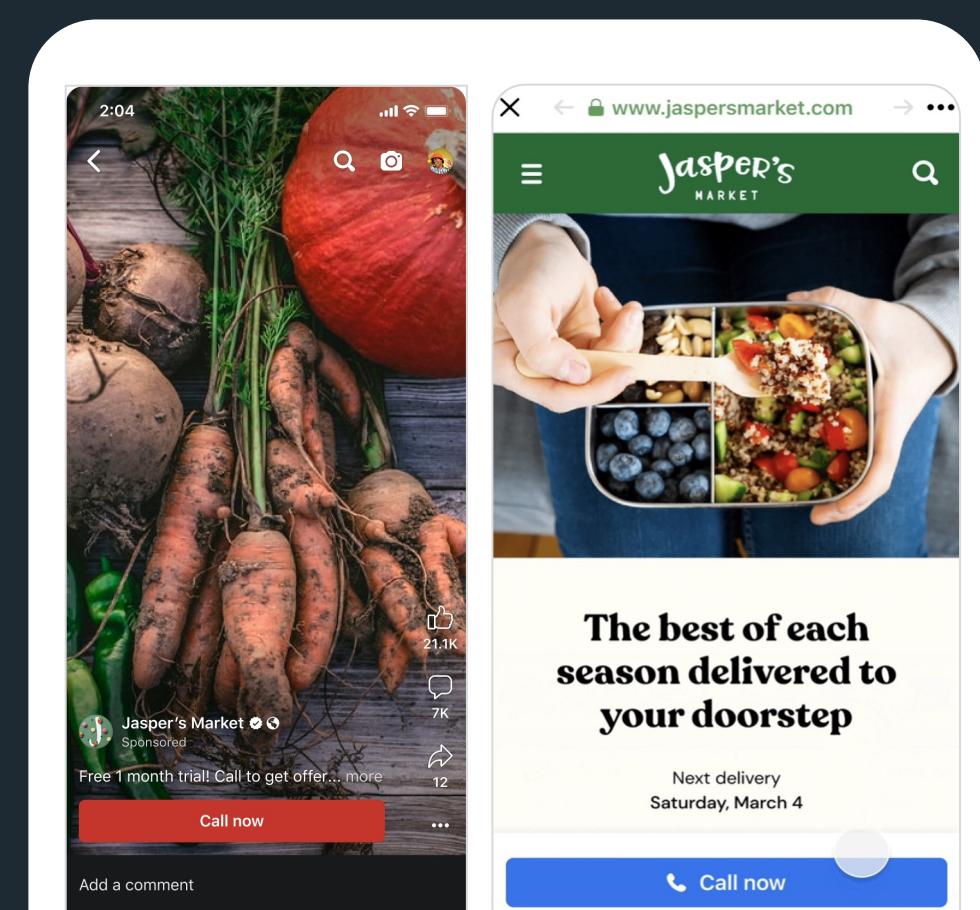


Click to Messenger for Lead Generation

Click to Instagram Direct for Lead Generation

Click to WhatsApp for Lead Generation

CALLING



Call ads

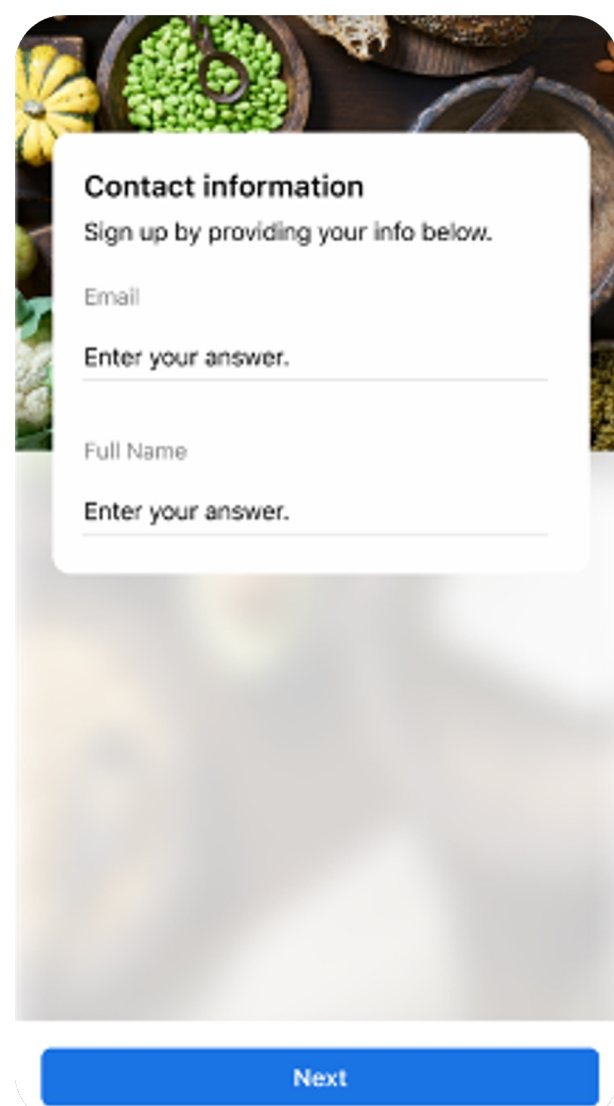
Call add-on

Lead forms allow people to share contact info and other details with businesses.

Ads that click to message for lead generation allow people to engage with businesses through chat Q&A.

Calling placements encourage calls from potential customers in the moment of consideration.

Instant forms



Instant forms allow people to express interest in your business in just a few taps. They're mobile-first, load quickly and auto-populate with info that the user has shared with Meta.

INSTANT FORM USE CASES

For most advertisers, instant forms are recommended, offering

- A user-friendly experience for people
- The ability to optimize for quality or volume through performance goals in Ads Manager

[→ Learn more about instant forms](#)

SumUp, a European financial tech company reduced its cost per lead 4X by filtering and qualifying leads with instant forms.³

[→ SumUp success story](#)



DID YOU KNOW?

In a recent study, instant forms outperformed website forms, with an average

20%

lower cost per qualified lead¹

Conversion leads is a performance goal for instant forms that allows you to reach people who are most likely to become customers.

Ads that used the conversion leads performance goal, and also integrated their CRM with the Conversion API, saw an avg

16%

reduction in cost per quality lead

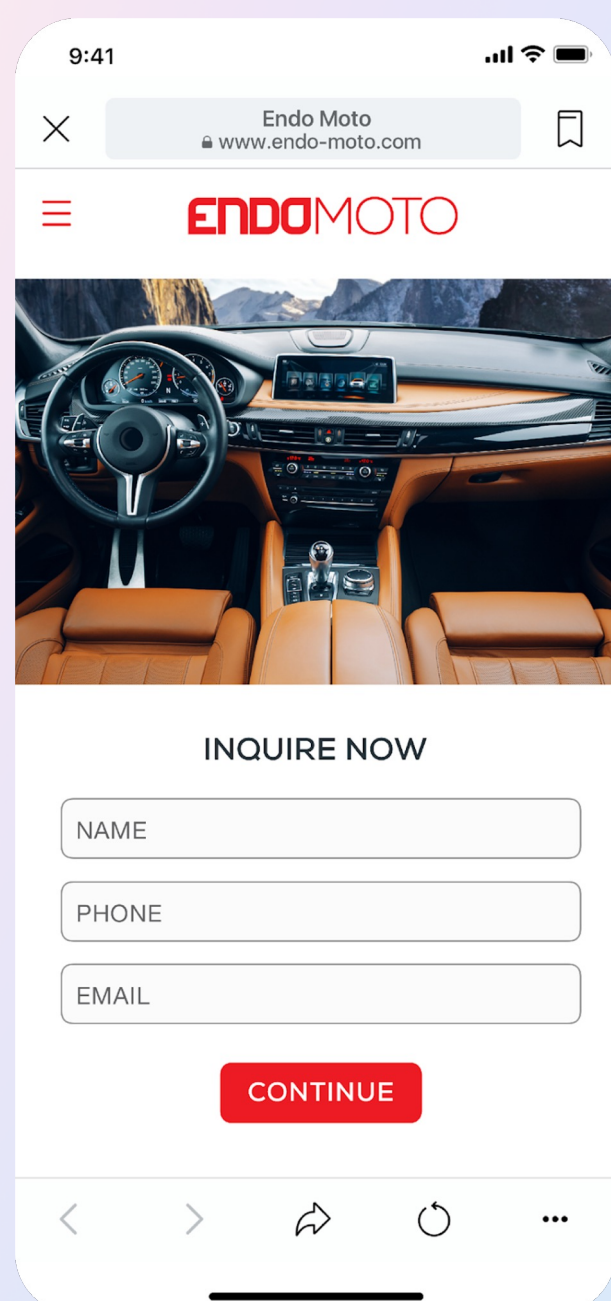
28%

increase in rate of converting a lead to a quality lead

compared to ads using the leads performance goal²

[→ Learn more about setting up CRM for conversion leads](#)

Website forms



Website forms allow people to visit your website and submit a form there. Integrate with the [Conversions API](#) for website events to optimize your ads.

WEBSITE FORM USE CASES

Consider website forms if your customers

- Generate quotes or book appointments directly with your online system
- May benefit from viewing full product or service details before submitting a form
- Share sensitive info with you (e.g. SSN)



NEW FEATURE: INSTANT FORM ADD-ON

When people click through to your website from a lead generation ad, you can now add an instant form to the in-app browser. The additional form offers autofill capabilities so people can easily submit their info.

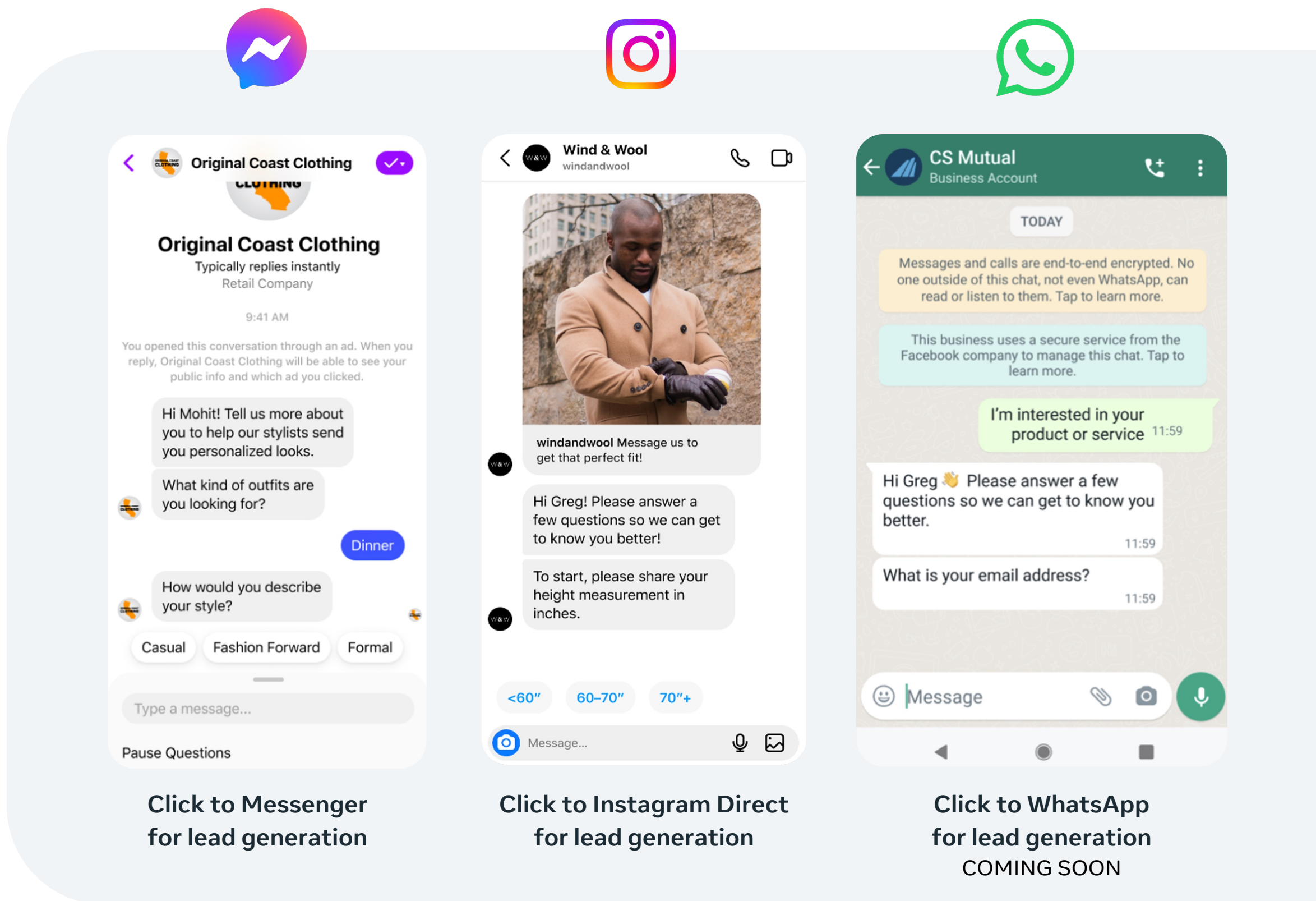
[→ Learn more about instant form add-on](#)

Source: 1. Analysis of 15 global 3-cell A/B tests run from Nov 2022–Feb 2023 where advertisers self-reported results and used website forms that were similar to their Meta forms. Instant form campaigns used conversion leads performance goal. 2. Source: Results based on A/B tests on 68 advertisers, with ads delivered globally from Aug 8–14, 2023 and included incentives. Performance may vary. Conversion from lead to quality lead occurs when a user takes a qualifying, lower-funnel action identified by the business, which moves them into a “quality lead” status. Qualifying actions or events vary by business, based on their individual sales funnel event stages. 3. Meta case study, Jun 2022.

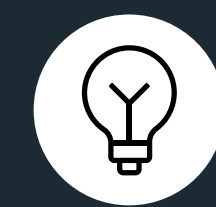
Campaign set up for lead generation forms

	Instant forms	Website forms
Data integrations		
CRM Integration for lead retrieval	Sync the leads you generate through Meta directly to your CRM to access them seamlessly and follow up quickly. You can also connect your CRM using Meta Business Suite .	
Conversions API	CRM integration with the Conversions API: Share CRM data with the Conversions API so Meta can reach leads more likely to convert (use with the conversion leads performance goal for instant forms). Learn more	Web events integration with the Conversions API: Share actions that take place on your website with the Conversions API to improve performance. Learn more
Meta Business Partners	Make CRM integrations easier by working with a partner Learn more	
Engaging surfaces		
Build effective forms	<ul style="list-style-type: none">Communicate why people should fill out your form in the ad with a clear call-to-action.Use the intro section to include information about your business and what people can expect when they submit your form.To reduce friction, prioritize questions that will auto populate answers based on the info people have already given to Meta.Avoid asking too many questions, and avoid open-ended questions, to make it easy for people to submit your form.	
Advertising and conversion tools		
Objective	Leads	
Conversion location	Instant forms	Website
Performance goal	Maximize number of leads (for lead volume) Maximize number of conversion leads (for lead quality) <i>+ CRM integration with Conversions API</i>	Maximize number of conversions <i>+ Conversion API integration</i>
Budget	Use ad scheduling in the Campaign Budget Optimization to appropriately scale campaigns.	
Audience	Use a Lookalike Audience to reach people with characteristics similar to your current customers.	
	Create an engagement custom audience to reach people who started your Instant form but never finished it.	Create a website custom audience to reach people who visited your website but did not complete the form.
Placements	Use Advantage+ placements to maximize your budget and help show your ads to more people.	
Form type	Choose: Higher intent or More volume or Rich creative	Website forms
Form features	<ul style="list-style-type: none">Conditional logic (includes lead filtering)Browser add-on Instant formGated content (using a Completion section)	
Measurement tools		
Learning agenda	<ul style="list-style-type: none">Test 1 (for Website focused clients): Website forms (no Conversions API integration) + instant forms <u>vs</u> website forms (no Conversions API integration)Test 2 (for Form or Messenger focused clients): Instant forms <u>vs</u> instant forms + ads that click to Messenger, lead gen (destination optimization)Test 3 (for Form or Messenger focused clients): Instant forms <u>vs</u> instant forms + ads that click to Instagram Direct, lead gen	

Reach leads across your preferred messaging app



[→ Learn more about about lead generation in Instagram Direct and Messenger](#)



DID YOU KNOW?

Meta Business Messaging drives higher conversion rates compared to legacy channels⁴

53%
higher than SMS

61%
higher than email

87%
higher than other apps

Or, let Meta turn your instant form into a chat flow

Meta can convert your Instant form to a Messenger chat flow, delivering your ad as a form or chat depending on user preference. Choose “Instant forms + Messenger” as your conversion location in Ads manager.

Campaigns using “Instant forms + Messenger” compared to campaigns using instant forms alone (BAU), saw an average⁵

8% lower cost per lead

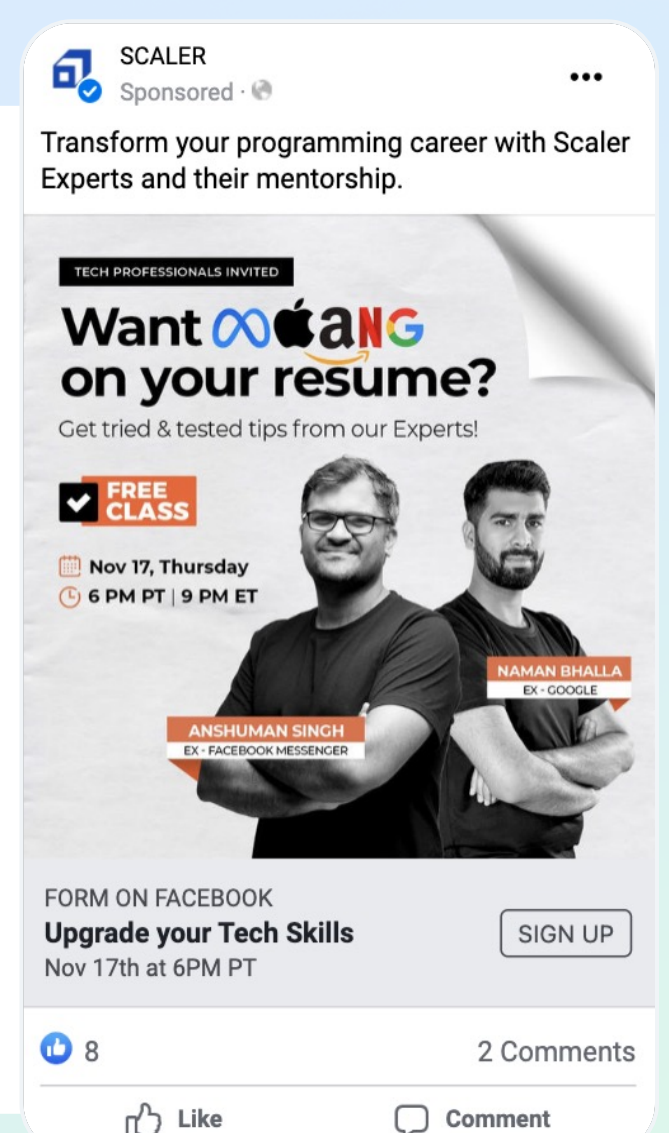
48% increase in reach

Scaler, a tech-focused education platform, used Instant forms + Messenger to get more people to sign up for its online classes, driving

40%

lower cost to attract eligible leads⁶

[→ Scaler success story](#)



Source: 4. Meta Business Messaging for Marketing and Sales, a commissioned study conducted by Forrester Consulting on behalf of Meta, Dec 2022. 5. Meta-analysis of 38 A/B tests of BAU Campaign vs. Destination Optimization (“Instant forms + Messenger”) campaigns globally, run across verticals from May 2022 to Aug 2023. The results show the “Instant forms + Messenger” strategy outperforms BAU Campaign with 97% confidence. 6. Meta case study, Nov 2022.

Campaign set up for lead generation messaging

Ads that click to message for lead generation (Messenger, IG Direct, WhatsApp coming soon)

Data integrations	Sync the leads you generate through Meta directly to your CRM to access them seamlessly and follow up quickly. You can also connect your CRM using Meta Business Suite or a 3rd party messaging app.		
Lead retrieval			
Engaging surfaces			
Build effective chat flows	<ul style="list-style-type: none">Clarify that your business wants to chat.Make your greeting a continuation from the ad and explain benefits of answering questions.Start with qualifying, easy questions and ask more sensitive ones later.Integrate questions that have helped find your best leads on other platforms.Set expectations with clear next steps including who will contact them, on which channel and when.Six questions or fewer in a chat flow is usually optimal.		
Advertising and conversion tools			
Objective	Leads		
Conversion location	Messenger <u>or</u> Instagram (IG Direct) <u>or</u> Instant forms + Messenger <u>or</u> WhatsApp (coming soon)		
Performance goal	Maximize number of leads		
Budget	Use ad scheduling in the Campaign Budget Optimization to appropriately scale campaigns.		
Audience	<p>Use a Lookalike Audience to reach people with characteristics similar to your current customers.</p> <p>Create an engagement Custom Audience to reach people who started your Instant form but never finished it.</p>		
Placements	Use Advantage+ placements to maximize your budget and help show your ads to more people.		
Messaging features	<p>Available on Messenger and IG Direct</p> <ul style="list-style-type: none">Qualify leads: Conditional logic, lead filtering, quick repliesGet more completed lead submissions: Promo code, answer validation, completion reminder, visual response optionsNurture and re-engage: Live agent handoff, marketing messages, sponsored messages		
Measurement tools			
Learning agenda for messaging	<ul style="list-style-type: none">Test 1: Instant forms alone <u>vs</u> “Instant forms + Messenger” (destination optimization)Test 2: Instant forms alone <u>vs</u> instant forms + ads that click to Instagram Direct for lead generation		

Call ads

Encourage potential customers to call you in the moment of consideration, without leaving the Facebook app.



CALL AD USE CASES

- Direct calls are needed for your customers to complete a booking or schedule an appointment.
- Your target customers often need a live conversation to get more information before purchasing.

[→ Learn more about call ads](#)



NEW FEATURE: Request a callback

Gives people the option to have a business call them back at a specific time. “Callback requests submitted” metric will be available in Ads Manager when running a campaign with this feature.



DID YOU KNOW?

New reporting metrics for call ads can offer more insight into your highest value customers.

Customer calls placed

Total calls placed to your business.

20-second calls

The 20-second metric should be your standard for how many reliable calls may be coming into your business.

60-second calls

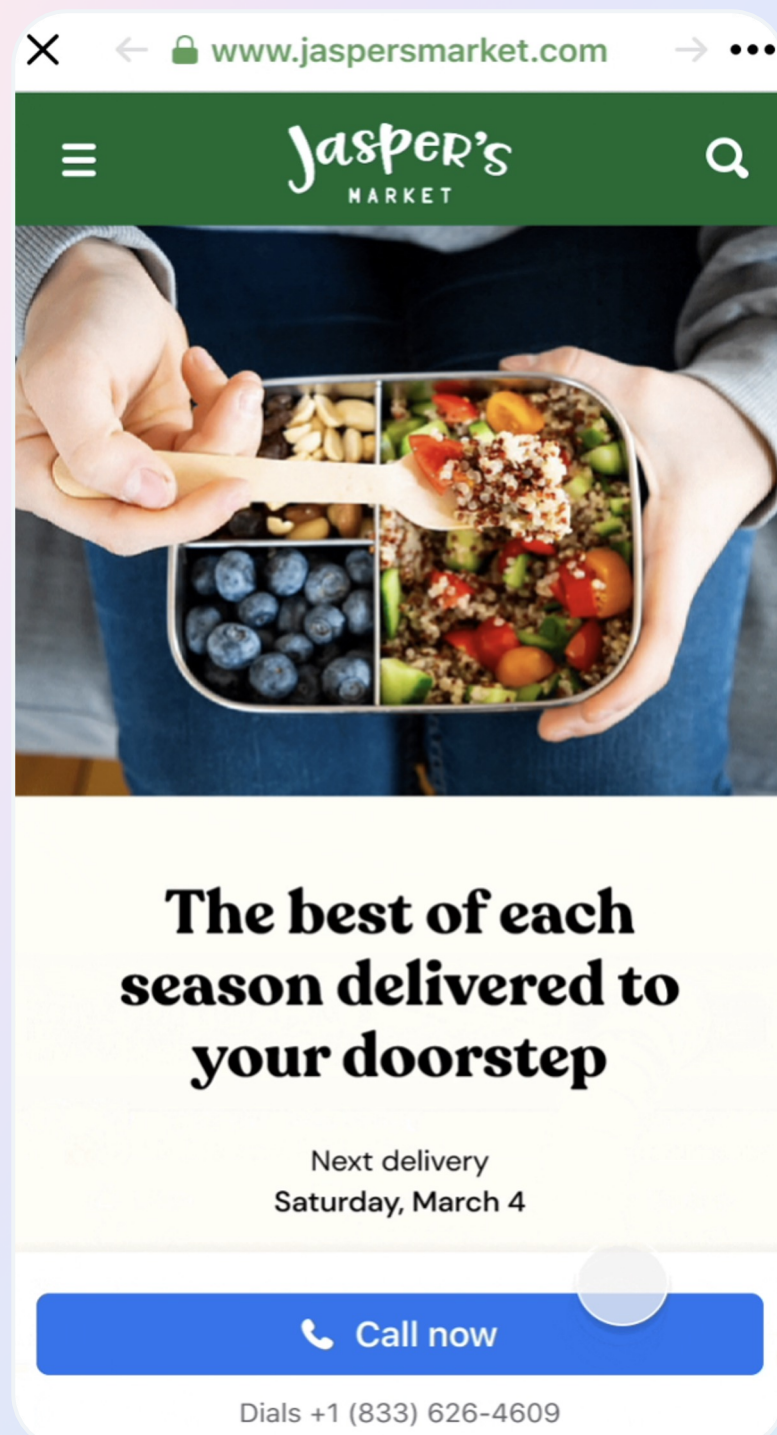
The 60-second metric can help you understand calls of a more significant length – whether it was a live conversation with an agent or leaving a voicemail.

[→ Learn more about new metrics for call ads](#)

CURRENTLY AVAILABLE IN THE US

Call add-ons

Drive people to your website and offer them the option to call you when they arrive.



CALL ADD-ON USE CASES

- You offer a complex product or service that requires a longer consideration process.
- Your customers benefit from viewing the full details of your web page before calling.
- e.g. Medicare insurance, personal injury lawyers

[→ Learn more about call add-ons](#)

Top Business Class, a boutique travel agency, tested the call add-on feature, and saw an increase in qualified leads with a lower cost per incremental qualified lead.⁷

[→ Top Business Class success story](#)



Campaign set up for lead generation calling

	Call ads	Call add-ons
<div>Data integrations</div> <div>Conversion attribution</div>	Attribute calls you receive from customers back to specific call ad campaigns for website events, app events, or offline events. Choose your attribution setting at the ad set level when creating a call ad campaign in Meta Ads Manager.	
<div>Engaging surfaces</div> <div>Best practices</div>	<ul style="list-style-type: none">Call Ads only appear as mobile placements and will not be shown on desktop, making it even more important to follow mobile-first best practices.Schedule call ads or a call add-ons to run when your business can take calls. You can also use the Request a Callback feature to let people tell you when to call them.Display your business information to give customers security in picking up your call when you create an instant form. Learn more	
<div>Advertising and conversion tools</div> <div>More ways to create call ads</div>	<ul style="list-style-type: none">Easily convert top-performing posts into call ads. Learn moreThird party developers can create call ads using the Marketing API from Meta. Learn more	
Objective	Leads or Traffic	Leads or Traffic
Conversion location	Calls	Website
Performance goal	Maximize number of calls	<ul style="list-style-type: none">Maximize conversions + Call add-on as destinationMaximize number of link clicks + Call add-on as destination
Budget	Use ad scheduling in the Campaign Budget Optimization to appropriately scale campaigns.	
Audience	Use a Lookalike Audience to reach people with characteristics similar to your current customers.	Create a Website Custom Audience to reach people who visited your website but did not complete the form.
Placements	Use Advantage+ Placements to maximize your budget and help show your ads to more people. Facebook Reels are now part of both Advantage+ Placements and Manual Placements for call ads. Learn more about supported objectives and placement options.	
Reporting metrics	Reporting metrics can offer more insight into high value customers. They include: Customer calls placed. 20-second calls. 60-second calls. Learn more	
<div>Measurement tools</div> <div>Learning agenda for calling placements</div>	If you run Traffic campaigns with a Link Clicks performance goal to get callers, test against call ads with a Leads objective.	If you run Traffic campaigns with a Link Clicks performance goal to get website actions, test against call add-on with a Leads objective.

