

Facebook Leads Campaign Setup

Complete step-by-step guide to build, test, publish, and check your first roofing lead-generation campaign.

Beginner-friendly for U.S. roofing businesses. Follow every step exactly.

GUIDE MAP

- 1. Create the Leads campaign
- 2. Set up the Homeowners ad set
- 3. Choose the correct Instant Form
- 4. Upload the first two or three creatives
- 5. Complete the ad copy and settings
- 6. Duplicate ads for a clean creative test
- 7. Publish and confirm delivery
- 8. Respond to leads quickly

Before you begin

Complete the Foundations Guide and Instant Form setup first. You should already have a verified Business Manager, a Facebook Page, and a completed Instant Form ready to select.

PART 1 — CREATE THE LEADS CAMPAIGN

Step 1: Start a New Campaign

Inside Meta Ads Manager, click the green **Create** button.

Step 2: Keep the Buying Type as Auction

Under Buying Type, keep **Auction** selected. Do not change this setting.

Step 3: Choose the Leads Objective

Under Campaign Objective, select **Leads**, then click Continue.

Step 4: Name the Campaign

Use a clear name that identifies the service and conversion method.

Example: Roofing Leads – Lead Forms

Step 5: Confirm the Campaign Settings

- Buying Type: Auction
- Campaign Objective: Leads

Step 6: Use Campaign Budget

Keep **Campaign Budget** turned on. This lets Meta distribute the budget if you add more ad sets later.

Step 7: Set the Daily Budget

For a local U.S. roofing campaign, start with **\$25 to \$50 per day**. Choose an amount you can maintain while the campaign gathers data.

Step 8: Keep Highest Volume

- Campaign Bid Strategy: **Highest Volume**

- Cost per Result Goal: Leave blank
- Budget Scheduling: Leave off
- Special Ad Categories: Leave blank

Review the settings, then click **Next**.

PART 2 — SET UP THE HOMEOWNERS AD SET

Step 1: Name the Ad Set

Include the target location, starting age, and audience group.

Example: San Antonio / 25+ / Homeowners

Step 2: Choose the Conversion Location

Under Conversion Location, open the drop-down menu. Select **Single**, then choose **Instant Forms**.

Step 3: Select the Correct Facebook Page

Choose the official Facebook Page for your roofing business.

Step 4: Accept the Meta Lead Ads Terms

Click **View Terms** when the prompt appears. Accept the terms, then return to the ad set setup.

Step 5: Keep the Conversion Settings

- Performance Goal: **Maximise Number of Leads**
- Cost per Result Goal: Leave blank
- Value Rules Enabled: No
- Advantage+ Catalogue: Do not change anything

Step 6: Leave Budget and Schedule Unchanged

The budget is already set at the campaign level. Do not change it here.

Step 7: Enter the Target Location

Enter the city, ZIP code, or service location. Select the correct result and check the map.

Step 8: Choose a Practical Radius

Use a radius that matches how far you are willing to travel for inspections and jobs (for example: 10, 15, 25, or 30 miles).

Step 9: Turn Off Location Expansion

Below the map, find **Reach more people likely to respond** and **untick** it. Leaving it on may show ads outside your selected service area.

Step 10: Set the Audience

- Minimum age: **25**
- Maximum age: **60 or 65+**
- Gender: **All Genders**

Step 11: Add the Homeowners Interests

Under Detailed Targeting, click the pencil icon. Add the closest available versions of these interests **inside the same audience group** (this matches Audience Group 1 from the Targeting document):

- Homeowners
- Homeowners Association
- Home Improvement

- Home and Garden
- Renovation
- Construction
- Home Repair
- Starter Home
- First-Time Home Buyer
- New House
- Maintenance, Repair and Operations
- Home Construction

Meta may rename or remove interests. Select the closest relevant option available in your account.

Step 12: Review and Continue

- Correct Page selected
- Instant Forms selected
- Correct location and radius
- Location expansion turned off
- Age and gender correct
- Homeowners interests grouped together

Click **Next**.

PART 3 — SET UP THE ADS

Step 1: Name the First Ad

Use a name that makes the format and creative easy to identify later.

Example: Ad 1 / Image / Before and After Roofing

Step 2: Confirm the Identity

Select the correct Facebook Page. If Instagram is connected, select the correct Instagram profile.

Step 3: Check the Ad Setup

- Ad Setup: **Create Ad**
- Format: **Single Image or Video**
- Multi-Advertiser Ads: Keep on for now

Step 4: Select the Correct Instant Form

Under Destination, choose **Instant Forms** and select the form you created in the Foundations / Letter-Offer guide. Check the form name carefully.

Step 5: Upload a Creative

Under Ad Creative, find Media and click **Set Up Creative**. Choose an image or video.

For the first test, use **two or three different creatives** while keeping everything else the same:

- Real before-and-after roofing image
- Before-and-after or project video
- Offer image with a genuine starting price
- Customer testimonial
- Team or worker image that builds trust

Use real project content whenever possible. The image does not need to look professionally produced, but it must be clear and genuine.

Step 6: Add the Ad Copy

Complete Primary Text, Headline, and Description. Make sure the copy matches the image and the Instant Form offer (use the Letter-Offer Templates PDF).

Step 7: Choose the Call to Action

Select **Learn More**.

Step 8: Turn Off Automatic Creative Changes

Keep features off when they could change your original ad:

- AI-generated images
- Automated videos
- Visual touch-ups
- Text rewrites
- Creative variations
- Image overlays
- Add Music to Reels
- Automatic translations
- Text or media translation

Step 9: Remove Related Media

Confirm your chosen file appears under Uploaded Media. Delete unnecessary items under Related Media so Meta does not use old account images.

Step 10: Review the Preview

Check Facebook and Instagram previews. Confirm the creative, copy, Page identity, CTA, and Instant Form are correct.

PART 4 — DUPLICATE ADS FOR A CLEAN CREATIVE TEST

Step 1: Quick Duplicate the First Ad

Click the three dots beside the ad and choose **Quick Duplicate**.

Step 2: Turn Off Music Recommendations

If Meta recommends Add Music to Reels, untick it, then click Duplicate.

Step 3: Rename the Duplicate

Remove the word “Copy” and use a descriptive name (example: Ad 2 / Image / Offer Graphic).

Step 4: Change Only the Creative

Change **only the image or video**. Keep the same Primary Text, Headline, Description, CTA, Instant Form, audience, location, and age range.

Step 5: Remove Related Media Again

Make sure only the intended new creative is selected.

Clean-test rule

During the first creative test, only the image or video should change. This lets you see which creative is responsible for the leads. This matches the Testing Groups Map (Phase 1–3).

PART 5 — PUBLISH AND CONFIRM DELIVERY

Step 1: Preview to Publish

Review the campaign, ad set, form, and ads one final time.

Step 2: Publish

Click **Publish**. Meta will send the campaign for review.

Step 3: Confirm Everything Is Turned On

- Campaign toggle is on
- Ad set toggle is on
- Each intended ad toggle is on

Step 4: Check Again After 5 to 10 Minutes

Return to Ads Manager. The campaign may show “In Review” before it becomes Active.

Step 5: Confirm Impressions

Once the campaign is active and receiving impressions, people are seeing the ads.

Step 6: Give the Campaign Time

Do not expect many leads in the first few hours. A new campaign needs time to gather data. Leads may begin arriving later that day or the next day.

Step 7: Respond Quickly

Contact every lead as soon as possible through Messenger, phone, SMS, WhatsApp, or email. Slow follow-up increases the chance that the lead forgets the enquiry or contacts another roofer. (This part is on your side — the course does not cover sales scripts.)

FINAL PRE-PUBLISH CHECKLIST

Tick every box before you hit Publish. This is your last quality gate.

Campaign Settings

- Campaign objective is Leads (not Traffic, Engagement, or Sales)
- Buying Type is Auction
- Campaign Budget and daily budget are correct (\$25–\$50 recommended start)
- Bid strategy is Highest Volume
- Special Ad Categories is blank

Ad Set & Conversion

- Conversion Location is Instant Forms
- Performance Goal is Maximise Number of Leads
- Correct Facebook Page is selected
- Correct location and service radius are selected
- “Reach more people likely to respond” / location expansion is turned OFF
- Age (25+) and gender (All) are correct
- Homeowners interests are grouped together in one audience

Ads & Creative

- Correct Instant Form is selected
- Two or three ads use different creatives but the exact same copy
- Related Media has been removed
- CTA is Learn More
- AI enhancements, music, and translations are OFF
- Campaign, ad set, and all ads are turned ON

Ready for Leads

- Someone is ready to respond to leads immediately (Messenger / phone)

Remember the testing order

1. Start with Homeowners audience + 2–3 creatives only.
 2. Let it run 2–3 days before making changes.
 3. Pause weak creatives, keep winners, add new creatives.
 4. Only test new audiences (from Audience Packs) after creative testing stabilizes.
- This matches your Testing Groups Map exactly.