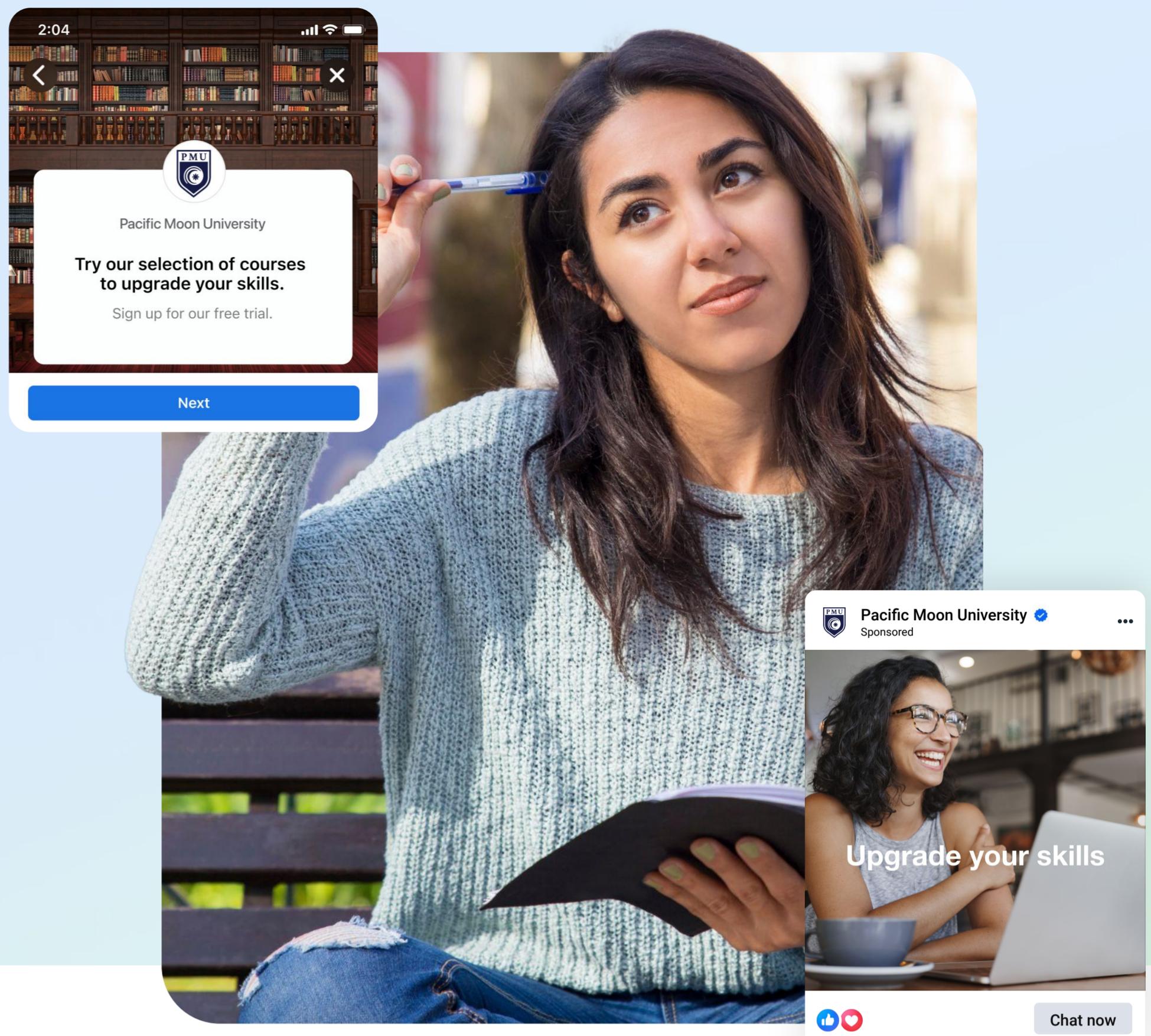


Lead generation best practices for education advertisers

Meta lead generation solutions help businesses create demand with high-quality prospects, and nurture those relationships to drive sales.



Moving leads through the customer journey is a unique process for every business. This guide is tailored to higher education and education technology advertisers. The recommendations throughout are based on the following principles to help you identify the best strategy and combination of tools for your business.

LEAD ACQUISITION

Creating and capturing interest of potential customers

 Generate leads across multiple types of lead ads

 Optimize acquisition with automation and AI

LEAD QUALIFICATION

Identifying prospects likely to convert

 Adjust user experience to drive different outcomes

 Invest in your first-party data strategy

LEAD NURTURING

Re-engaging potential customers

 Follow up with new leads quickly and clearly

 Set up a measurement plan to test and learn over time

LEAD MANAGEMENT

Retrieving and tracking your leads

 Operationalize lead management tasks

Common lead generation challenges for education advertisers:

- **Qualifying leads:** High volume of courses or locations, requiring a higher level of intent from the lead in order to submit important information during acquisition process
- **Seasonality:** Demand is affected by end of school dates and pre-set course start and enrollment dates.
- **Long sales cycles:** Managing extended enrollment cycles that require multiple touchpoints, often both virtually and in-person.
- **Lead nurturing:** Effectively nurturing leads with personalized content and follow-ups while managing a range of communication preferences, i.e. younger skewing digital natives and less savvy digital adopters.



Generate leads across multiple types of lead ads

Lead ad types represent different conversion locations, i.e. where you collect a lead's information after they click on your ad. Using multiple conversion locations can be an efficient way to achieve marketing goals at scale, and accommodate a range of customer preferences, like filling out a form, calling you directly, chatting on a messaging platform. Choose conversion locations that align with how your business operates and where you are resourced to respond quickly to lead submissions.

GET STARTED

Primary conversion location recommendations for education advertisers:

- **Instant forms:** Make it easy for people to fill out a form directly from your lead ad. Instant forms are mobile-first, quick-loading forms that auto-populate answers for the person filling it out, and offer advertisers a variety of customization features.
- **Destination optimization** (“Instant forms and Messenger” conversion location): Create one campaign that will optimize delivery using either an instant form or Messenger, based on user preferences. Use to increase reach and enhance the experience for both digital natives and adopters with different communication preferences.

In a recent study, advertisers who ran **both instant form and website form** campaigns at the same time, compared to only website form campaigns, saw:¹

60% lower cost per lead

125% increase in lead volume

OPTIMIZE

Diversify with a secondary conversion location to help increase reach and lead volume while keeping cost per lead low.

- **Complementary instant form and website form campaigns:** Diversify with two form campaigns, which can lower cost per lead and increase lead volume. For website forms campaigns, enhance your site experience by adding a frictionless instant form or call now button that shows up on the bottom of the page, allowing prospects to browse course details before reaching out.
- **Complementary lead ads that click to Instagram chat campaign:** Reach digital natives on Instagram and DM to collect lead information.

→ In Ads Manager, use [budget scheduling](#) to increase spend during high demand periods like end of school year or before a new course is set to start.

→ Visit the Business Help Center

- [Learn more about instant forms](#)
- [Learn more about destination optimisation](#)
- [Learn more about website forms](#)
- [Learn more about instant form add-on or call add-on](#)
- [Learn more about lead ads that click to Instagram chat](#)



Optimize acquisition with automation and AI

Meta's easy-to-use AI products help businesses improve performance and enable marketers to do more with their time and resources. Education advertisers can take advantage of several Meta Advantage single step solutions to optimize campaigns using the Leads objective.

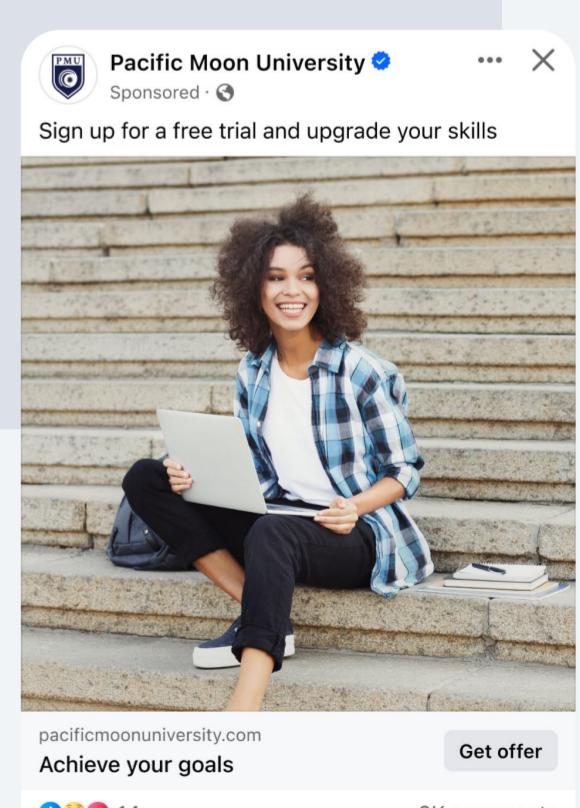
GET STARTED

Adopt one (or more) Advantage+ single step solutions available for Leads campaigns.

Advantage+ audience: Start by automating who sees your ads, to the reach people most likely to respond. Provide suggestions to guide ad delivery around age, gender, interests, demographics, behavior, custom audiences and lookalikes.

Ad sets using Advantage+ audience with instant form had 8% lower cost per lead

on average, compared to ad sets that used the original audience experience, for small business advertisers.²



OPTIMIZE

Adopt additional Advantage+ single step solutions from the get started column. Lean into controls only as needed to respect your specific constraints.

- **Advantage+ placements** automatically finds the most cost-effective placement for your ad. Take advantage by producing creative in multiple formats and dimensions.
- **Advantage+ creative** automatically optimizes your creative. Supply Advantage+ creative with creative components like images, videos and text.
- **Advantage campaign budget** automatically manages your budget across ad sets to get the best results.

→ Visit the Business Help Center

[Learn more about Meta Advantage](#)

Source: 1. Statistical meta-analysis of 22 A/B tests conducted globally from Jan 2023 to April 2024. Median CPA difference from outcomes analyzed between business as usual website form campaigns vs business as usual website form and instant form campaigns (using leads optimization). The results show the mixed campaign strategy outperforms the BAU strategy with 100% confidence. 2. This analysis was based on 9K randomly sampled observations of ad sets from SBG advertisers using Advantage+ audience or the original audience experience that were optimizing for lead generation and quality leads. These observations were from newly created campaigns using oCPM bidding that started between October 13, 2023 and November 9, 2023. Zero lead cases were removed. Double machine learning, an observational causal inference approach, was used to control for potential confounders such as vertical, region, historical spend, campaign, page, and ad attributes. Cost-per-lead is calculated as total ad set spend divided by leads during the period of the analysis.



Adjust the customer experience to drive different outcomes

Balancing lead quality and volume can be complex for education advertisers with long consideration stages. Meta offers features and optimizations that enable you to customize the lead ad experience for a range of use cases and outcomes.

GET STARTED

Choose an instant form template, or form type, in Ads Manager to focus on either volume or quality.

- **More volume:** Make it easy for people to quickly submit the form on a mobile device.
- **Higher intent:** Register leads for in-person events using a review screen to ensure accuracy and improve pre-event communications.
- **Rich creative:** Modify color and imagery to infuse recognizable branding and add more detail about course options or a student testimonials section.

OPTIMIZE

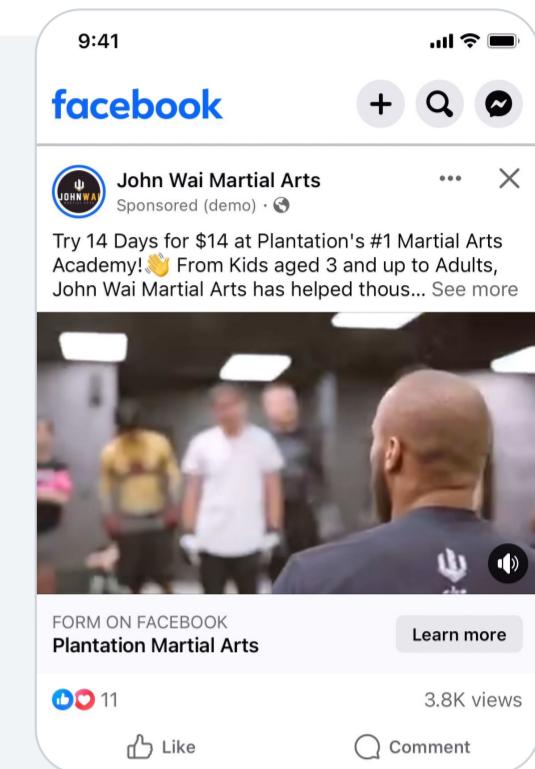
Adopt customization features to filter leads, incentivize submissions and build credibility.

- **Conditional logic:** Identify different course or location criteria about potential students, or personalize a degree or program recommendations based on interest. Or, use conditional logic to build student pipelines for different enrollment periods, e.g. ask about education goals, course interest and when they're interested in starting, to follow up with relevant information.
- **Gated Content:** Provide valuable resources like course brochures, or a free trial offer, after the person completes an instant form or click to message Q&A.

CASE STUDY

John Wai Martial Arts academy used instant forms and the conditional logic feature to **increase its conversion rate from lead to customer by 62%**, compared to instant forms alone.¹

[LEARN MORE](#)



Visit the Business Help Center

- [Learn more about conditional logic](#)
- [Learn more about gated content](#)
- [Learn more about instant form types](#)



Invest in your first-party data strategy

Reach higher quality prospects while keeping cost per quality lead low, by connecting first-party data with the Conversions API to help Meta's delivery system target people most likely to convert.

GET STARTED

Conversions API for CRM: If you use instant forms, share first-party data from your CRM, collected through instant form submissions. Leverage that signal to inform future campaigns.

→ After setup, run instant form campaigns using the conversion leads performance goal to activate your integration. Advertisers who used this setup saw an average **15% reduction in cost per quality lead and 44% increase in rate of converting a lead to a quality lead** compared to the leads performance goal.²

Conversions API for web: If you use website forms, share first-party lead data from your website server and track form submissions and other website actions.

→ To drive the best outcomes for website conversions, use the Conversions API and Meta Pixel together to maximize coverage of website interactions. With this setup, **education advertisers saw 16% additional conversions.**³

OPTIMIZE

Optimize for upper and lower funnel actions with Conversions API for both CRM and web

- **Conversions API for CRM:** Optimize ad set for mid-to lower-funnel "conversion lead" event stage. You can choose more than one, but these stages should be accomplished by 1-40% of all leads (10-30%, ideally).
- **Conversions API for web:**
 - **Lead volume:** Optimize ad set for events that best represent a lead submission (e.g. Lead, Complete Registrations)
 - **Lead quality:** Optimize ad set for the event that best represents a qualified lead (e.g. subscription, appointment booking, purchase)

CASE STUDY

Scaler is a tech-focused upskilling and reskilling platform for tech professionals based in India. Using Conversions API for CRM best practices they saw a **58% increase in prospects passing entrance tests at a 73% lower cost per test.**⁴



Visit the Business Help Center

- [Learn more about Conversions API for web](#)
- [Learn more about setting up a Meta Pixel](#)
- [Learn more about Conversions API for CRM](#)
- [Learn more about the conversion leads performance goal](#)

Source: 1. [Meta case study](#) Sep 4-18, 2023. 2. Results based on A/B tests on 273 advertisers, with ads delivered globally from Jan 11-28, 2024, and included incentives. Results were statistically significant at a 95% confidence level. 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 internal data. Median increase based on the number of conversions from both Conversions API for web and Pixel between Mar 1-7, 2023. 4. Result based on client metrics shared with Meta: Jul 26-Aug 24 2023, India.

Follow up with new leads quickly and clearly

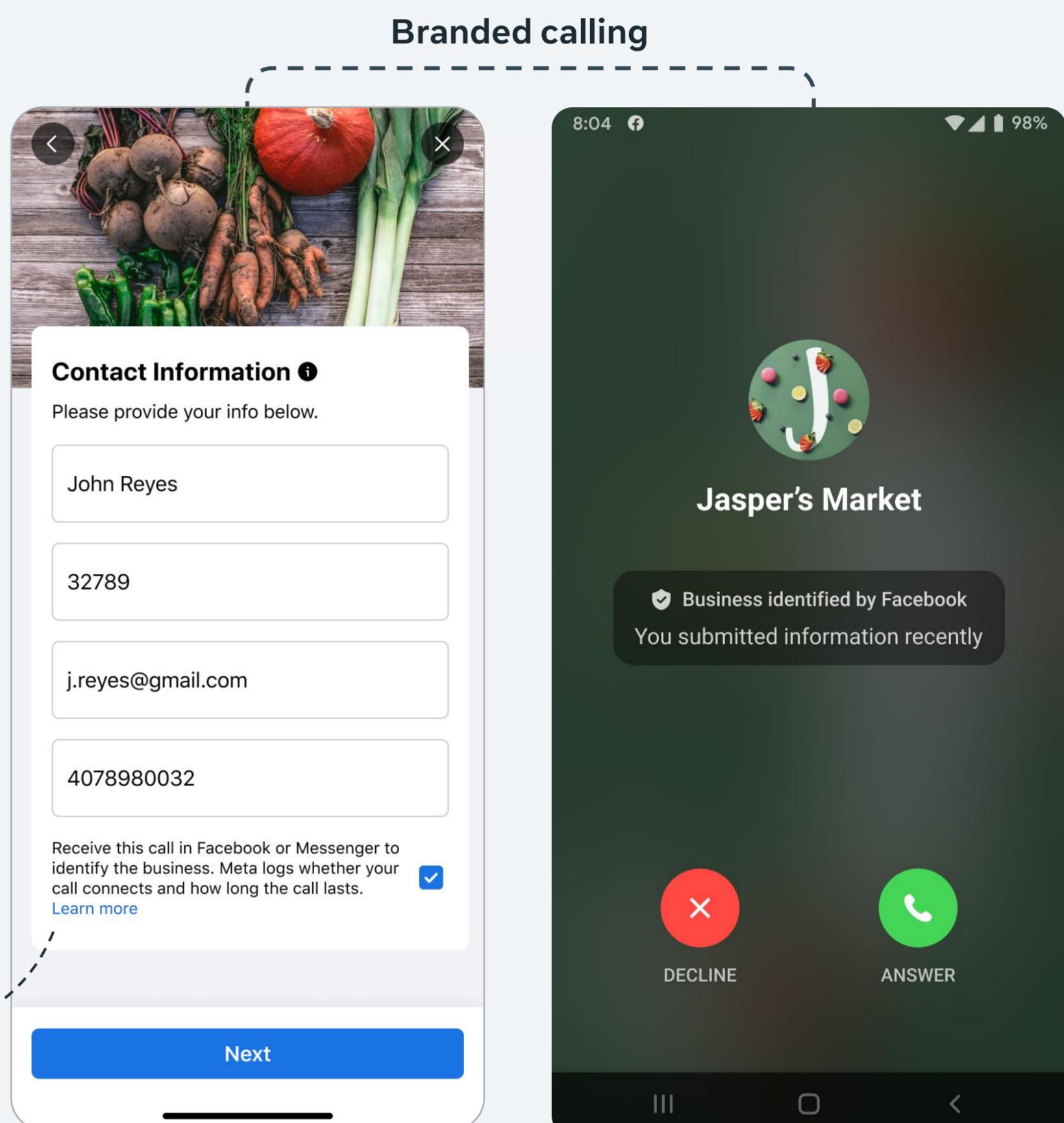
Nurturing a lead requires guiding a qualified potential customer through your sales funnel to conversion. Education advertisers dealing with seasonality and longer consideration cycles may need to engage prospects across multiple touchpoints as they make a final decision.

Meta is continuing to invest in lead nurturing solutions that can help advertisers follow up with interested potential customers quickly and clearly without switching channels, and while building trust. The nurturing solutions you will be able to leverage will depend on the solutions you've adopted in the acquisition and qualification stages.

Nurture instant form leads more effectively by phone

Branded calling adds an opt-in field to your instant form for the lead to receive calls from you in Facebook or Messenger. This allows the person to see your business information (like name and logo) on the incoming call screen when receiving your following up call.

Identifying your business during outbound calls gives people context on who the caller is, which may alleviate spam concerns and encourage pick up to help you achieve a higher connection rate.



Receive this call in Facebook or Messenger to identify the business. Meta logs whether your call connects and how long the call lasts.

[Learn more](#)

Visit the Business Help Center

- [Learn more about branded calling](#)
- [Learn more about using messaging for lead generation](#)

Lead opts in to receive calls when submitting your instant form

Business name appears on lead's incoming call screen

Nurture leads more effectively in Messenger

Lead ads that click to Messenger: Follow up or re-engage leads within an existing messaging thread

- Use Inbox in Meta Business Suite, or a third-party app if you use one, to re-engage leads who started but didn't finish submitting their information with personalized messaging in the same chat thread.
- If you use a third-party messaging app, you can also ask people to opt-in to marketing messages and re-engage them that way





Operationalize lead management tasks

Managing leads using a CRM or another type of lead management platform can help you access, filter and re-engage leads in one central location. Automating workflows like these can help to minimize response time to new leads, save you time, and avoid losing access to leads not downloaded in 90 days.

Meta has partnerships, integrations and free solutions that can help you manage and sync leads from Meta Business Suite.

- **Connect your CRM to Meta Business Suite for automatic lead download.**
Once your CRM is synced, your leads will be automatically downloaded when an instant form or lead ad that clicks to message questionnaire is completed.
- **Google Sheets*** lead management integration now allows you can now sync new leads automatically when an instant form is submitted.
- **Leads Center*** is a free, lightweight CRM system within Meta Business Suite for businesses that generate leads through instant forms or ads that click to message. With Leads Center you can easily manage, track and re-engage leads.

→ Visit the Business Help Center

- [Learn more about integrating your CRM](#)
- [Learn more about how to use Google sheets to manage leads](#)
- [Learn more about Leads Center](#)

*Connecting your CRM to automate lead retrieval is also the first step in setting up Conversions API for CRM

To proceed with that integration, connect your CRM for lead retrieval using one of three methods that **also allows you to share that data back with Meta** as signal for quality optimization in future campaigns.

1. **Connect your CRM directly:** Your CRM may have an integration to connect with Meta Business Suite. [Search available CRM integrations to find out how your system is supported.](#)
2. **Meta Business Partners:** Facilitate your integration without the need for developer resources for tasks like coding.
 - **CRM partners - Hubspot, Zoho, HighLevel:** Function as your CRM platform, and facilitate automatic lead download and Conversions API CRM integration.
 - **Workflow automation partners - Zapier, LeadsBridge, Make, DataHash:** Function as a connector between your CRM and the Conversions API. Meta has partners that can facilitate an integration with most CRM platforms.
3. **Build your own integration:** You can also build a connection using your own developer resources.

Education campaign set up overview

	ADS MANAGER	GET STARTED	OPTIMIZE
Generate leads across multiple types of lead ads	Conversion location	Instant Form	1. Website Form + Instant form ad-on or call add-on 2. Lead ads that click to Instagram Direct
		Destination Optimization (instant form + Messenger)	1. Website Form + Instant form ad-on or call add-on 2. Lead ads that click to Instagram Direct
	<p>Set up a measurement plan: Test conversion location setup compared to business as usual strategy</p> <ul style="list-style-type: none"> • BAU Cell: Instant Forms Test Cell: Destination Optimization “Instant forms + Messenger” • BAU Cell: Instant forms Test Cell: Instant forms campaign + Website forms campaign • BAU Cell: Instant forms Test Cell: Instant forms campaign + Lead ads that click to Instagram Direct campaign • BAU Cell: Destination Optimization “Instant forms + Messenger” Test Cell: Destination Optimization “Instant forms + Messenger” campaign + Website forms campaign • BAU Cell: Destination Optimization “Instant forms + Messenger” Test Cell: Destination Optimization “Instant forms + Messenger” campaign + Lead ads that click to Instagram Direct campaign 		
	Audience	<u>Advantage+ audience*</u>	
	Placement	<u>Advantage+ placements</u>	
	Budget	<u>Advantage campaign budget</u> <u>Budget scheduling</u> to increase spend during high demand periods	Advantage+ single step solutions from the get started column not already adopted
	Creative	<u>Advantage+ creative</u>	
	<p>Set up a measurement plan: Test how adopting Advantage+ features improve campaign performance</p> <p>[Example set up] BAU Cell: Website forms without Advantage+ range Test Cell: Website forms with Advantage+ range</p>		
Optimize lead acquisition with automation and AI	Instant form customization	Feature: Gated content Feature: Conditional logic	Form type: rich creative Form type: higher intent
	Instant form performance goals	Volume: Leads Quality: Conversion leads	
	<p>Set up a measurement plan: Test how using different Instant form features can improve campaign performance</p> <p>BAU Cell: Instant forms or Destination Optimization Test Cell: Instant forms or Destination Optimization + feature/form type</p>		
	1. Instant forms 2. Website forms	1. Conversions API for CRM + conversion leads performance goal 2. Conversions API for web + Meta Pixel	If using instant forms and website forms: optimize for a range of actions across both Conversions API for CRM and Conversions API for web.
<p>Set up a measurement plan: Test the impact of Conversions API integration for CRM + Instant forms</p> <p>BAU Cell: lead ads performance goal Test Cell: conversion lead ads performance goal</p>			
LEAD QUALIFICATION	Instant form destination	Branded calling: Toggle on ‘Display business information to encourage call pick up’	
LEAD NURTURING	Follow up with new leads quickly and clearly		
LEAD MANAGEMENT	Operationalize lead generation tasks	Automate lead retrieval via your CRM or Google Sheets. If you don't have a CRM, use Lead Centre.	