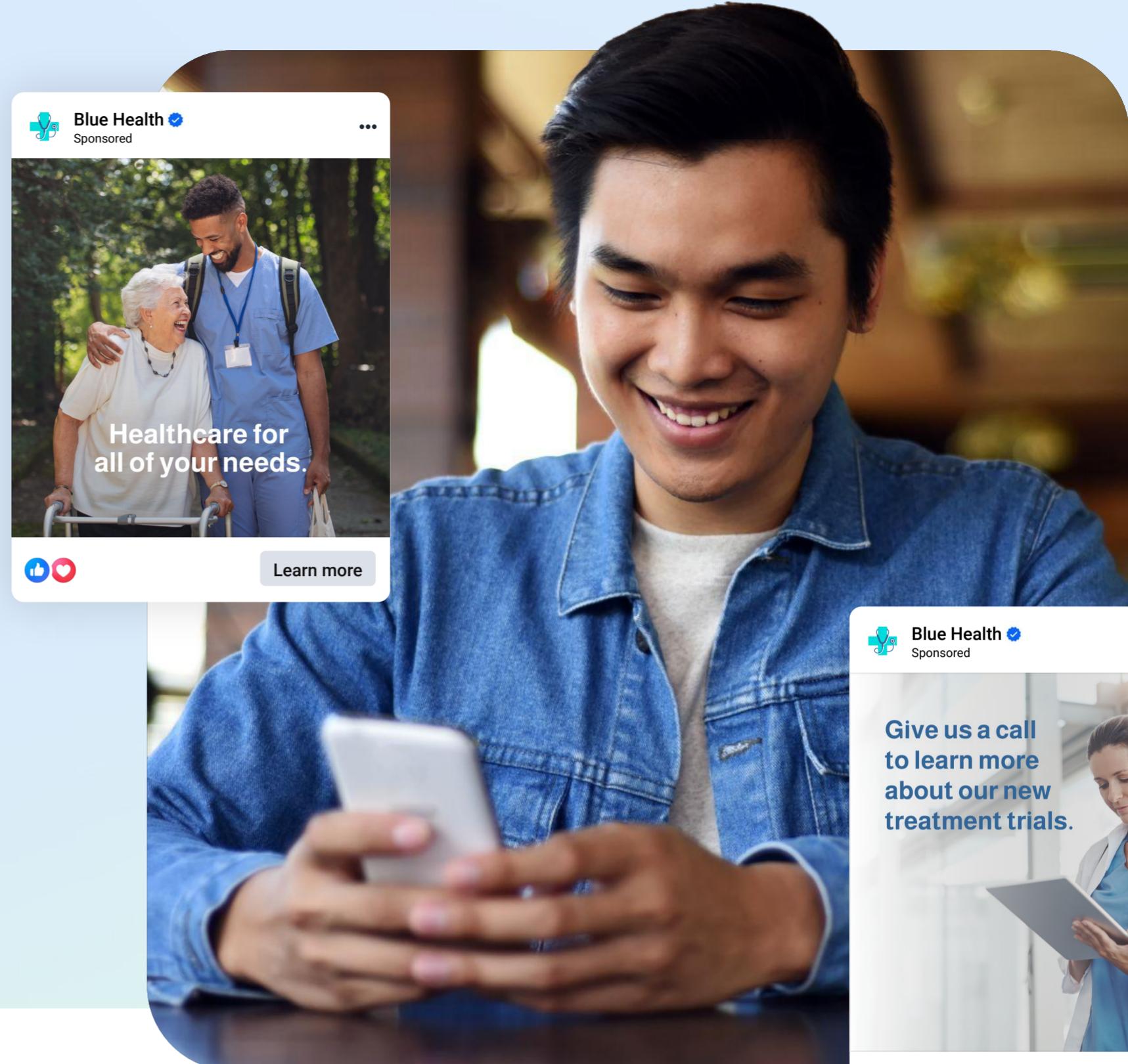


Lead generation best practices for healthcare advertisers

Meta lead generation solutions help businesses create demand with qualified patients and healthcare professionals, and nurture those relationships to drive action.



Moving leads through the customer journey is a unique process for every business. This guide is tailored to healthcare, biotech, and pharmaceutical 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 challenges for advertisers in the healthcare, biotech and pharmaceuticals, industries:

- **Lead qualification:** Effectively qualifying leads to identify high-value prospects
- **Trust and credibility:** Building relationships with potential patients or providers and driving patient loyalty program sign up.
- **Consumer education:** Educating consumers about treatments and services, which can often be complex and sensitive.
- **Data privacy:** Protecting customer data and adhering to policy restrictions, which can limit marketing strategies and make it difficult to collect accurate contact information.



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 is resourced to respond to lead submissions.

GET STARTED

Primary conversion location recommendations for healthcare advertisers:

- **Website forms:** Drive people to your website and collect lead information there. Use website forms if you need to ask questions restricted by Meta policies (e.g. patient health information) which cannot be asked via instant forms.
- **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.

OPTIMIZE

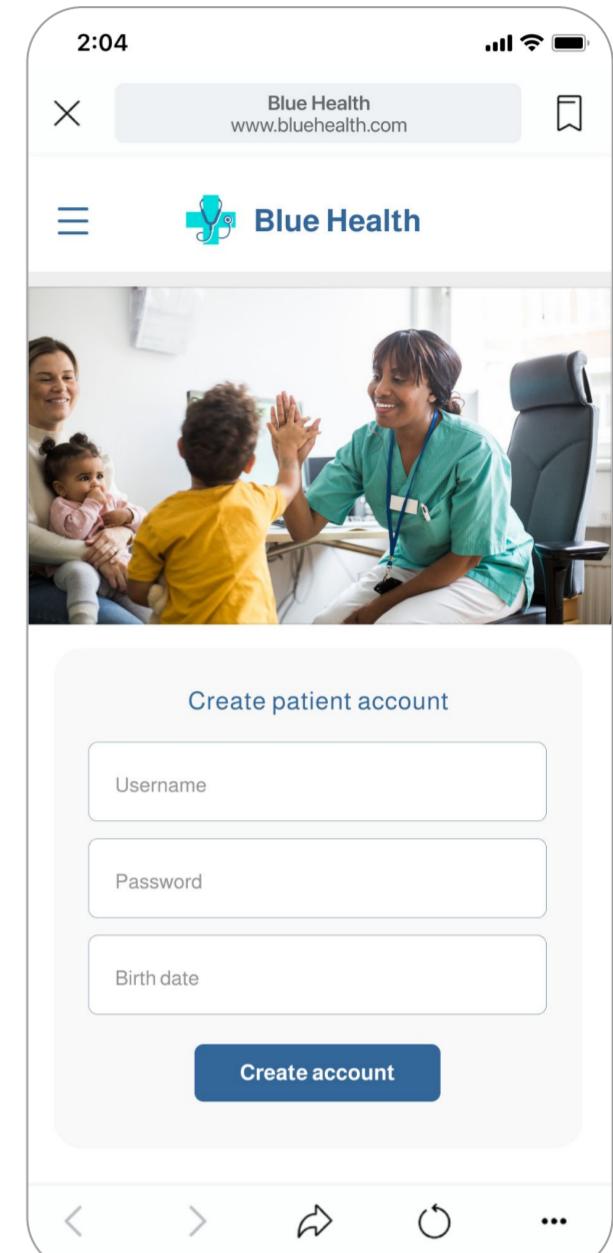
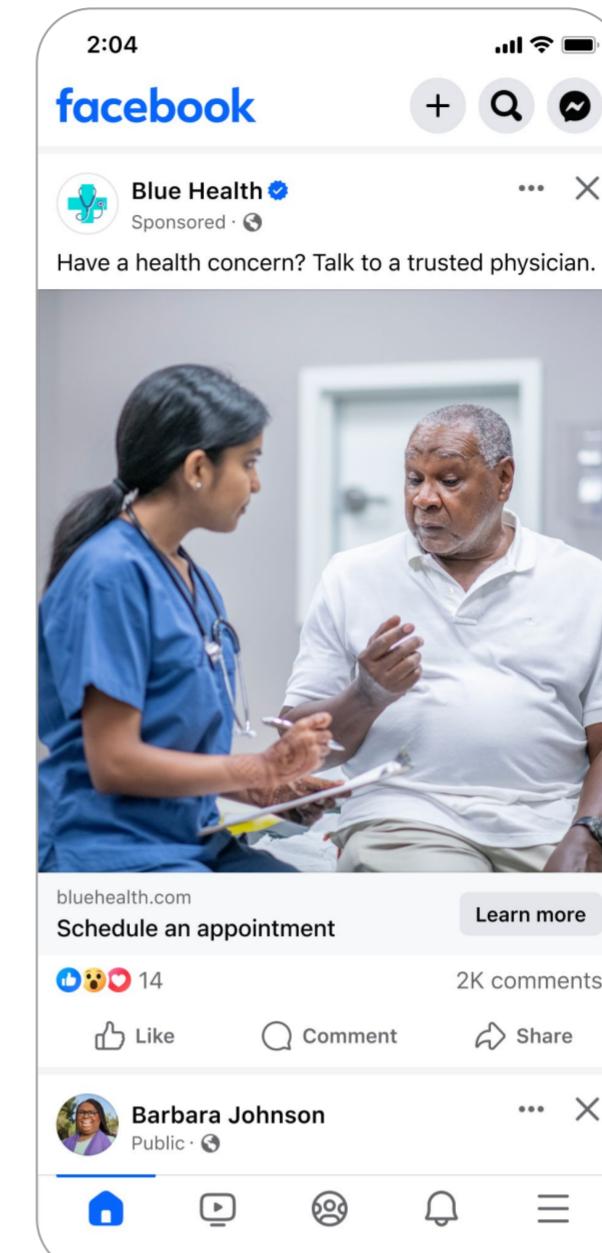
Diversify with a secondary conversion location to help increase reach and lead volume while keeping cost per lead low.

- **Instant form add-on or call add-on:** With website forms, enhance your website experience by adding an easy-to-fill-out instant form or call now button that shows up on the bottom of the page.
- **Complementary website form and instant form campaigns:** Diversify with both higher intent (website form) and lower intent (instant form) form campaigns, which can lower cost per lead and increase lead volume.
- **Destination optimization** (“Instant forms and Messenger” conversion location): Create one campaign that will optimize delivery to using either an instant form or Messenger, based on user 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, saw¹

60% lower cost per lead

125% increase in lead volume



Website form

⇒ Visit the Business Help Center

- [Learn more about website forms](#)
- [Learn more about instant form add-on](#)
- [Learn more about call add-on](#)
- [Learn more about instant forms](#)
- [Learn more about destination optimization](#)



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. Healthcare 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+ audiences** automatically shows your ads to people most likely to respond. Provide suggestions to guide ad delivery around age, gender, interests, demographics, behavior, custom audiences and lookalikes.
- **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.



Some pharmaceutical advertisers may not have access to Advantage+ audiences yet. Alternatively, leverage existing options to broaden targeting including demographic targeting and increasing Lookalike sizes.

OPTIMIZE

Adopt additional Advantage+ single step solutions. Lean into controls only as needed to respect your business's specific constraints.

⇒ Visit the Business Help Center

[Learn more about Meta Advantage](#)



Adjust the customer experience to drive different outcomes

Balancing lead quality and volume can be complex for healthcare advertisers. 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:** Add a review step that gives people a chance to double check contact information is accurate before submitting.
- **Rich creative:** Modify color and imagery to infuse recognizable branding. Include about us, product details and customer review sections.

OPTIMIZE

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

- **Gated content:** Incentivize completed forms by sharing a resource or call to action (e.g. exclusive health insights) after the lead submits an instant form.
- **Conditional logic:** Qualify high-value leads and filter out those who don't fit your criteria with a dynamic form for different types of customers. For example, you can ask about demographic information and determine whether a patient qualifies for a clinical trial. Or, experiment with proxy questions as a substitute for policy-restricted topics.

If using call ads as a conversion location, try giving leads the option to **request a callback** at a specific time, to allow flexibility for caretakers or patients unable to call right away.



CASE STUDY

UCLA Health used call ads with the request a callback feature to increase new patient acquisition and make it as easy as possible for patients or their caregivers to take action, resulting in **9x the volume of leads generated at 89% lower cost per lead**, compared to campaigns with a Traffic objective, optimizing for website link clicks.¹

Visit the Business Help Center

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



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: 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: Share first-party lead data from your website server and track website form submissions along with 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, **healthcare advertisers saw 14% 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 represents 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

MIRA Clinic, a cosmetic dentistry and plastic surgery clinic, **increased qualified leads by 48% while lowering cost per lead by 36%**, after setting up Conversions API for CRM and adopting the conversion leads performance goal for instant forms, compared to the leads performance goal.⁴

LEARN MORE

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](#)

Follow up with new leads quickly and clearly

Nurturing a lead means guiding a qualified potential customer through your sales funnel to conversion. Depending on your business, the timeframe from first seeing your ad, to making a purchase can vary quite a bit. 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.

CASE STUDY

Irvine Clinical Research, a drug trial patient recruitment center, used branded calling with its instant forms campaign to schedule screening appointments over the phone. The campaign delivered a **13.7% lower cost per lead and increased the phone call connection rate with patients by over 30%.**¹

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](#)

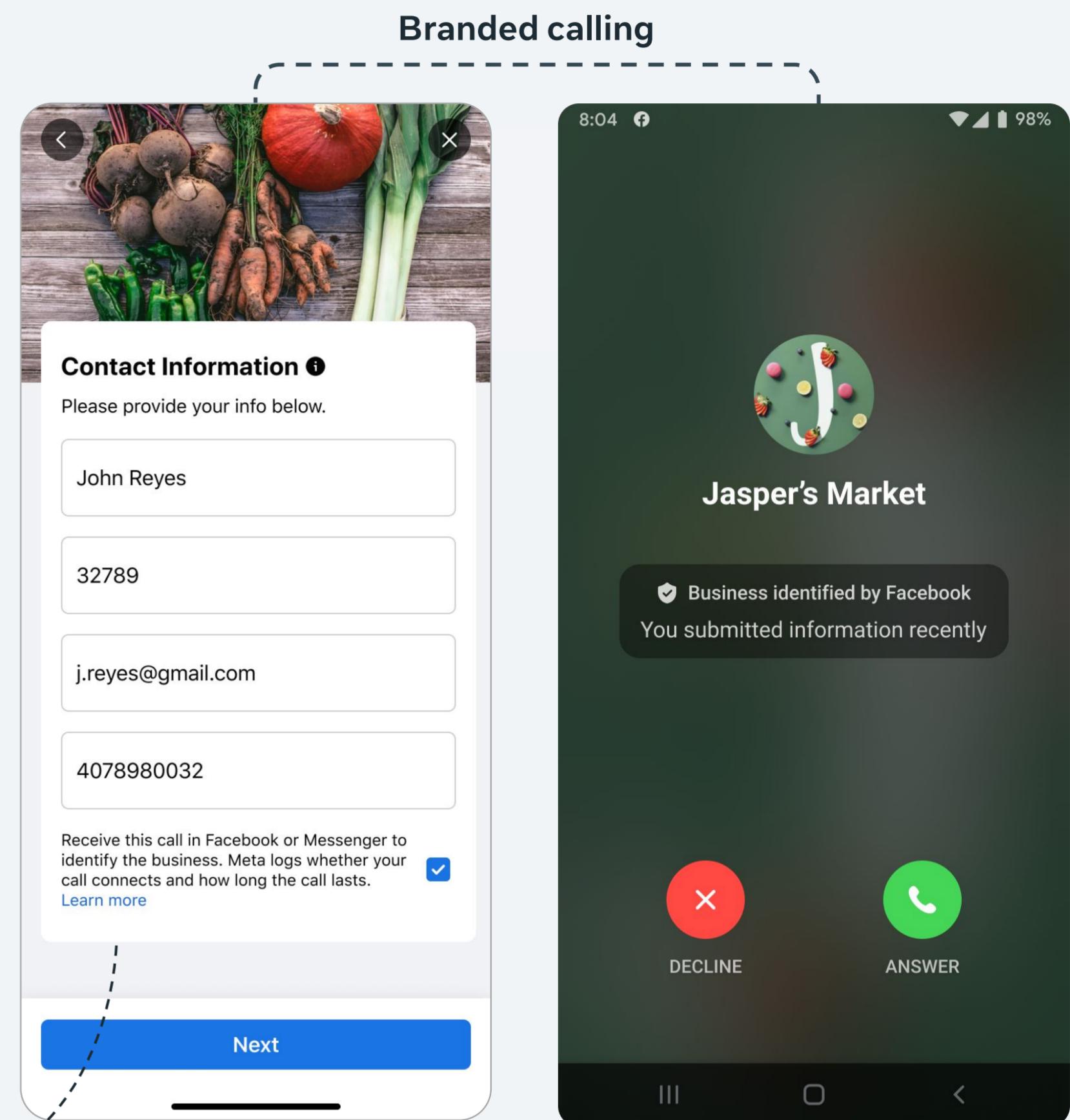
Visit the Business Help Center

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

To nurture leads more effectively in Messenger

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

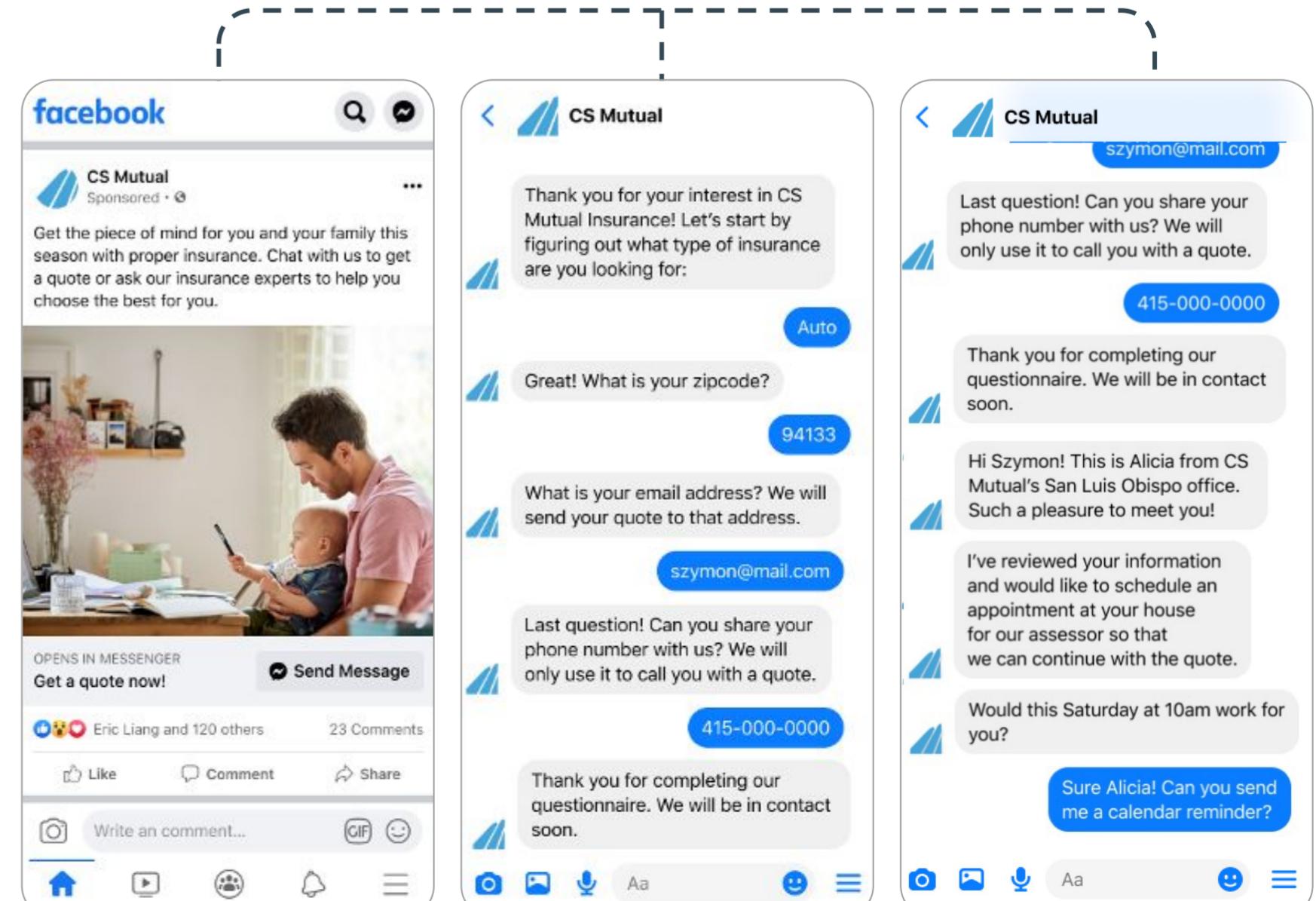
- Use Inbox in Meta Business Suite, or a third-party app if you use one, to re-engage leads who started but didn't finish submitting their information with personalized messaging in the same chat thread.
- If you use a third-party messaging app, you can also ask people to opt-in to marketing messages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



Lead opts in to receive calls when submitting your instant form

Business name appears on lead's incoming call screen

In-thread nurturing with lead ads that click to Messenger





Operationalize lead management tasks

Managing leads using a CRM or another type of lead management platform can help you access, filter and follow up with 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.

Healthcare campaign set up overview

| LEAD ACQUISITION | ADS MANAGER | GET STARTED | OPTIMIZE | | |
|---|---|---|---|--|--|
| | Conversion location | Website form Instant form | <ol style="list-style-type: none"> 1. Website form campaign with instant form add-on 2. Website form campaign with call add-on 3. Website form campaign + instant form campaign <ol style="list-style-type: none"> 1. Instant form campaign + website form campaign 2. Destination Optimization “Instant form + Messenger” | | |
| Generate leads across multiple types of lead ads | <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: Website forms Test Cell: Website Forms + Instant form add-on or call ad add-on • BAU Cell: Website forms Test Cell: Website Forms campaign + Instant form campaign • BAU Cell: Instant Forms Test Cell: Destination Optimization “Instant forms + Messenger” | | | | |
| Optimize lead acquisition with automation and AI | Audience Placement Budget Creative | <u>Advantage+ audience*</u> <u>Advantage+ placements</u> <u>Advantage campaign budget</u> <u>Advantage+ creative</u> | Advantage+ single step solutions from the get started column not already adopted <small>*If you do not have access to Advantage+ audiences, leverage campaign budget, placement and creative solutions to broaden targeting including demographic targeting and increasing lookalike sizes.</small> | | |
| <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> | | | | | |
| LEAD QUALIFICATION | Instant form customization | Form type: rich creative or higher intent | Feature: Gated content Feature: Conditional logic | | |
| | Instant form performance goals | Volume: Leads Quality: Conversion leads | | | |
| Adjust the customer experience to drive different outcomes | <p>Set up a measurement plan: Test how using different instant form features can improve campaign performance</p> <p>BAU Cell: Instant forms Test Cell: Instant Forms + feature/form type</p> | | | | |
| Invest in your first-party data strategy | 1. Instant forms 2. Website forms | <ol style="list-style-type: none"> 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 NURTURING | Instant form destination | Branded calling: Toggle on ‘Display business information to encourage call pick up’ | | | |
| | Follow up with new leads quickly and clearly | | | | |
| LEAD MANAGEMENT | Automate lead retrieval via your CRM or Google Sheets. If you don't have a CRM, use Lead Center. | | | | |
| | | | | | |