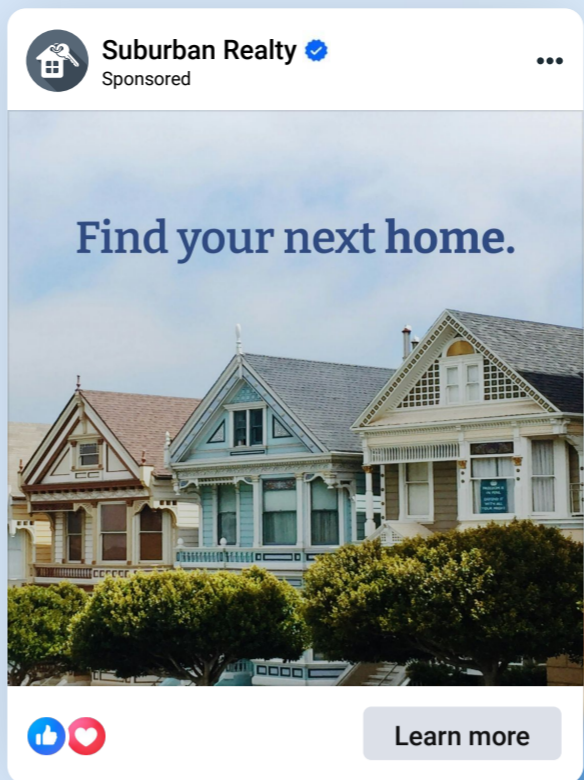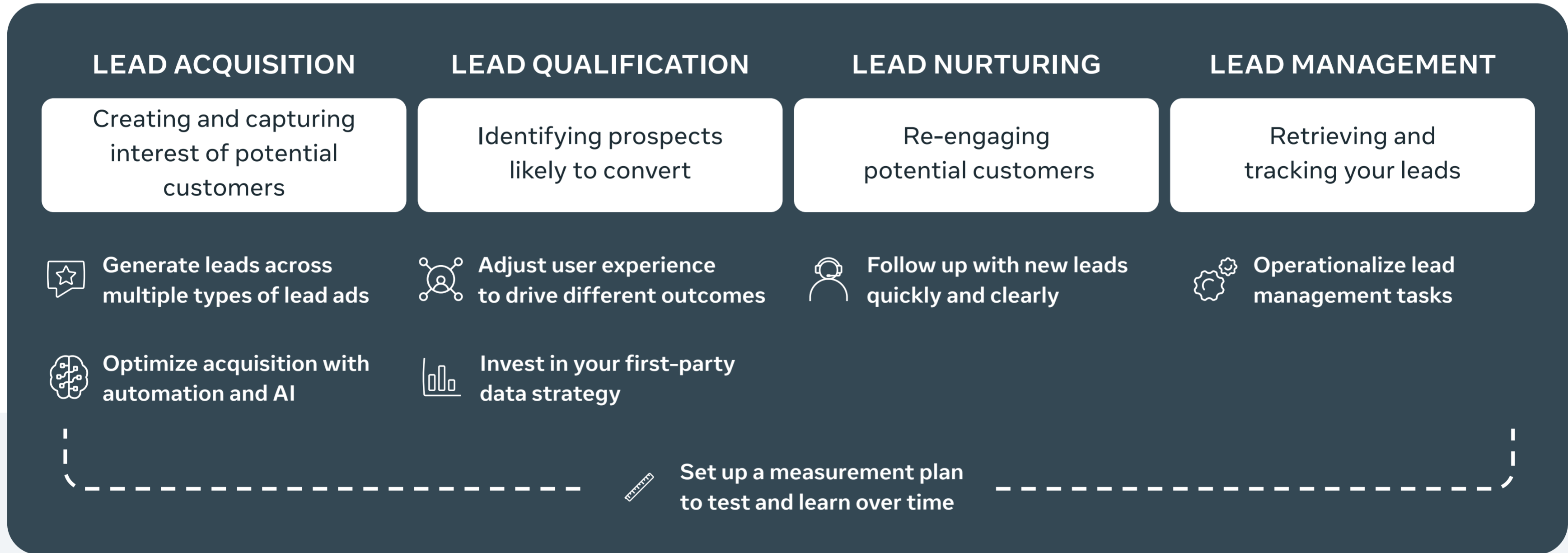# Lead generation best practices for professional services advertisers

Meta lead generation solutions help businesses create demand with high-quality prospective clients, 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 advertisers in services industries, like real estate, fitness and consulting. 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	LEAD QUALIFICATION	LEAD NURTURING	LEAD MANAGEMENT
Creating and capturing interest of potential customers	Identifying prospects likely to convert	Re-engaging potential customers	Retrieving and tracking your leads
Generate leads across multiple types of lead ads	Adjust user experience to drive different outcomes	Follow up with new leads quickly and clearly	Operationalize lead management tasks
Optimize acquisition with automation and AI	Invest in your first-party data strategy		

Set up a measurement plan to test and learn over time

Common challenges for advertisers in the professional services industry:

→ **Targeting:** Effectively reaching customers in a precise area, when word of mouth recommendations is a common method of generating new leads.

→ **Booking appointments:** Challenges integrating between advertising platforms and booking systems hosted on a website.

→ **Trust and credibility:** Leads may be low quality due to unresponsiveness or unverified contact details

→ **Longer consideration cycles:** Services often need deeper consideration before a purchase is made.

∞ Meta

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 professional services:

- **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.
- **Website forms:** Drive people to your website and collect lead information there. Use website forms if your customers benefit from visiting your website, and having access to full product details (e.g. portfolio of previous work, membership options, real estate listings).

OPTIMIZE

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

- **Destination optimization** ("Instant forms and Messenger" conversion location) creates one campaign that will optimize delivery using either an instant form or Messenger chat, based on user preferences. Professional services advertisers can use destination optimization to drive volume within a defined target area, and combine with carousel ad creative with a map card to show store location.
- **Instant form add-on or call add-on:** With website forms, add a frictionless instant form or call now button that shows up on the bottom of your webpage. Use if your product or service requires deeper consideration, or for appointment booking.

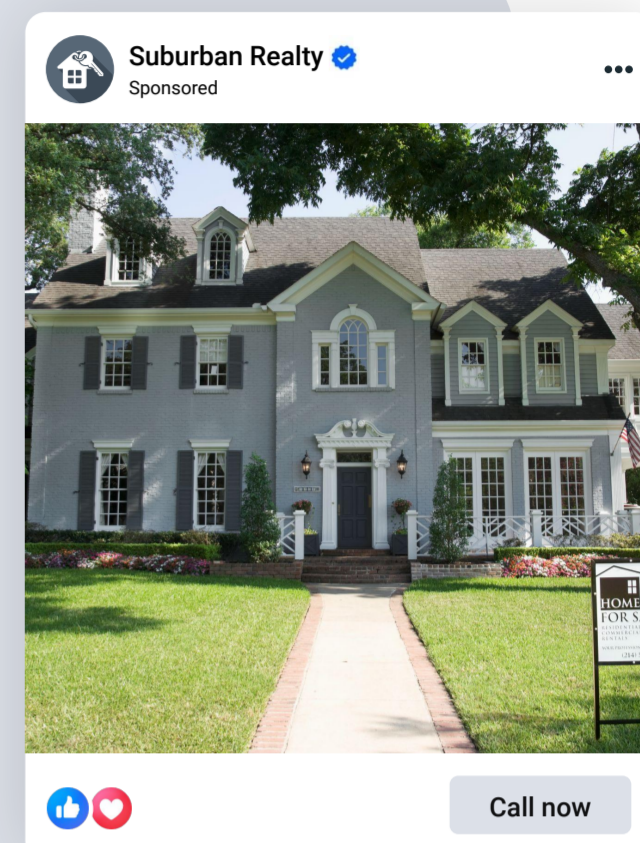Call ads product improvements drove results for professional services advertisers.[1]

22%

median reduction in cost per 60s call

27%

median increase in conversions rate per 60s call

compared to call ad campaigns prior to product improvements.

Suburban Realty
Sponsored

Call now

→ **Visit the 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. Services 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:** Find people most likely to be interested in your business. Use suggestions and controls if you need them, like age, location, interests, demographics, behavior, custom audiences and lookalikes.
- **Advantage+ catalog ads for lead generation:** Use images and details from your catalog, to personalize what each person sees in your ad based on what they are most likely to respond to. For example, a real estate agent can use Advantage+ catalog ads to showcase their available properties. The houses shown to each person will vary based on their interests.

OPTIMIZE

- **NEW** Incorporate video assets for different homes or service offerings to your Advantage+ catalog ads to engage new customers.
- **Adopt additional Advantage+ single step solutions.** Lean into controls only as needed, considering your business's specific constraints.
  - **Advantage+ placements** 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** manages budget across ad sets to get the best results.

Ad sets that use **Advantage+ audience with instant forms** saw

8%

lower cost per lead on average, compared to ad sets that used the original audience experience, for small business advertisers.[2]

→ **Visit the Business Help Center**

- Learn more about Meta Advantage
- Learn more about Advantage+ catalog ads for lead generation

Adjust the customer experience to drive different outcomes

Balancing lead quality and volume can be complex. Meta offers features 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. Add additional context like product descriptions and customer reviews.

OPTIMIZE

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

- **Gated content:** Incentivize prospects to submit a form with a promotional offer or digital brochure, to support a longer consideration process.
- **Conditional logic:** Qualify high-value leads and filter out those who don't fit your criteria with a dynamic Q&A form for different types of customers. For example to further validate leads are from the local area or in the market for what you offer (e.g. the right type of home or apartment, in the right time frame).
- **Use Meta Verified for businesses** to build credibility with new audiences in the absence of word of mouth recommendations. Can be used with any lead gen conversion location.
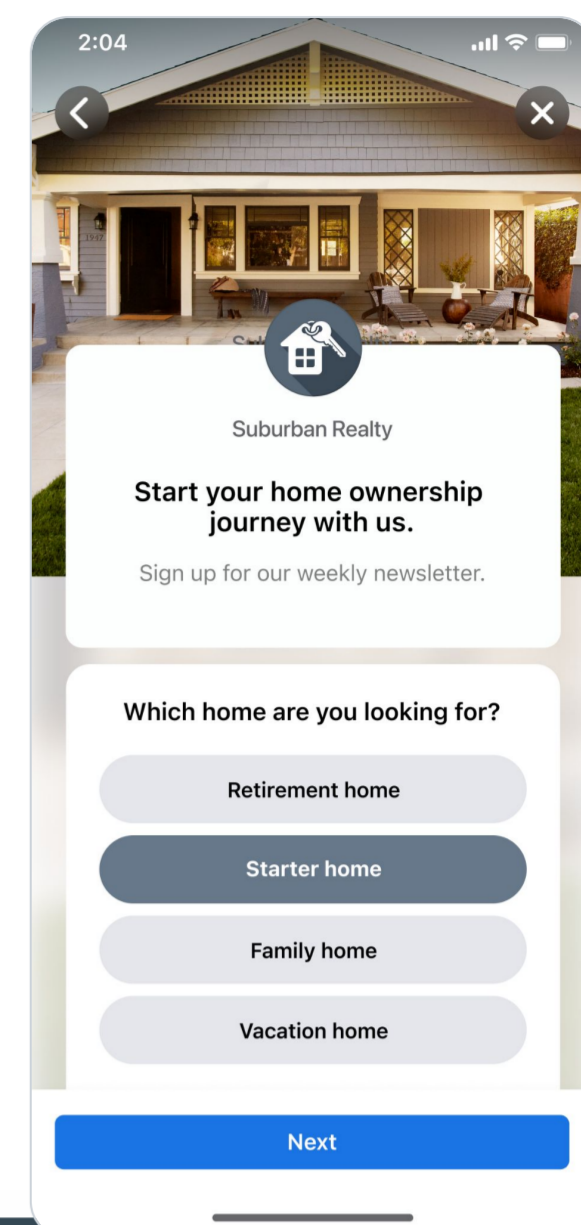
> **⊕ Visit the Business Help Center**
>
> - [Learn more about conditional logic](#)
> - [Learn more about gated content](#)
> - [Learn more about instant form types](#)
> - [Learn more about Meta Verified](#)

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.[1]

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, **professional services advertisers saw 16%** additional conversions.[2]

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

Godrej Properties leveraged Conversions API for CRM with the conversion leads performance goal to reach more qualified leads in the market for real estate.

They generated **12% more leads at a 26% lower cost per "site visit"**.[3]
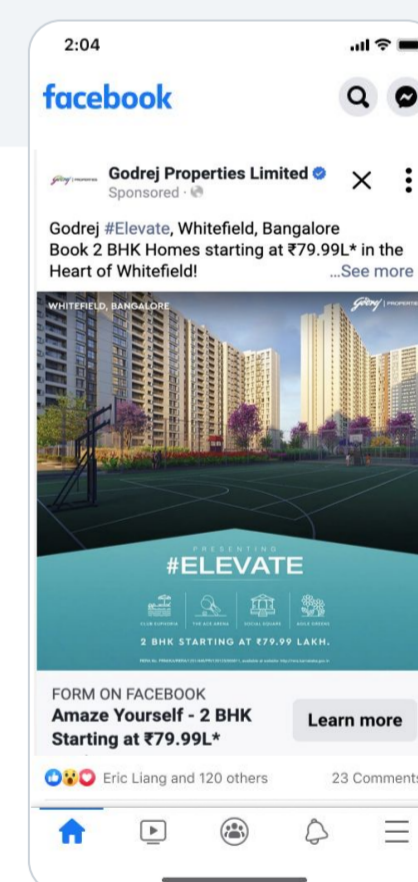
> **⊕ Visit the Business Help Center**
>
> - [Learn more about Conversions API for web](#)
> - [Learn more about setting up a Meta Pixel](#)
> - [Learn more about Conversions API for CRM](#)
> - [Learn more about the conversion leads performance goal](#)

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.

Branded calling

Lead opts in to receive calls when submitting your instant form
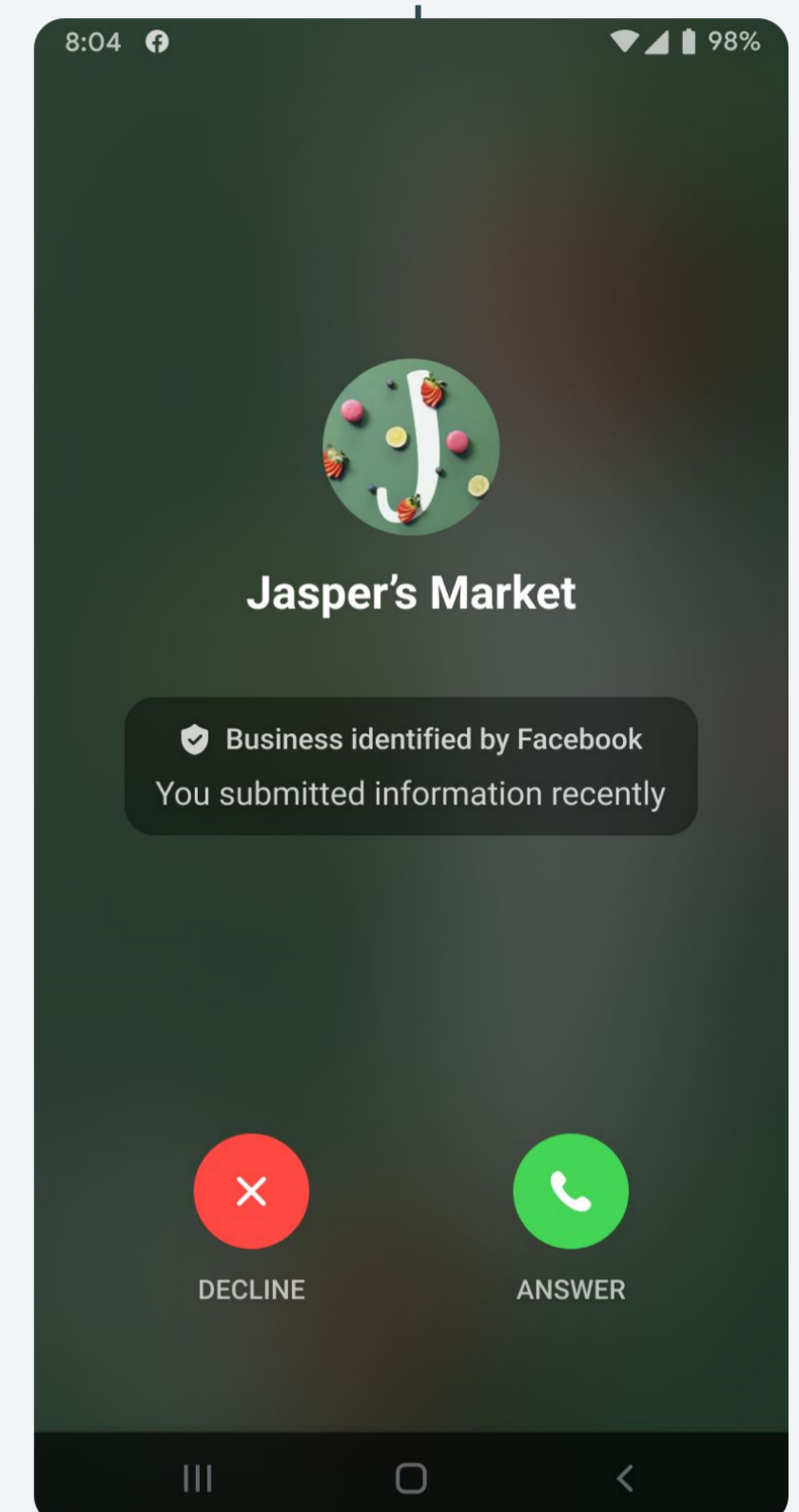
Business name appears on lead's incoming call screen

→ Visit the Business Help Center
- Learn more about branded calling
- Learn more about using messaging for lead generation

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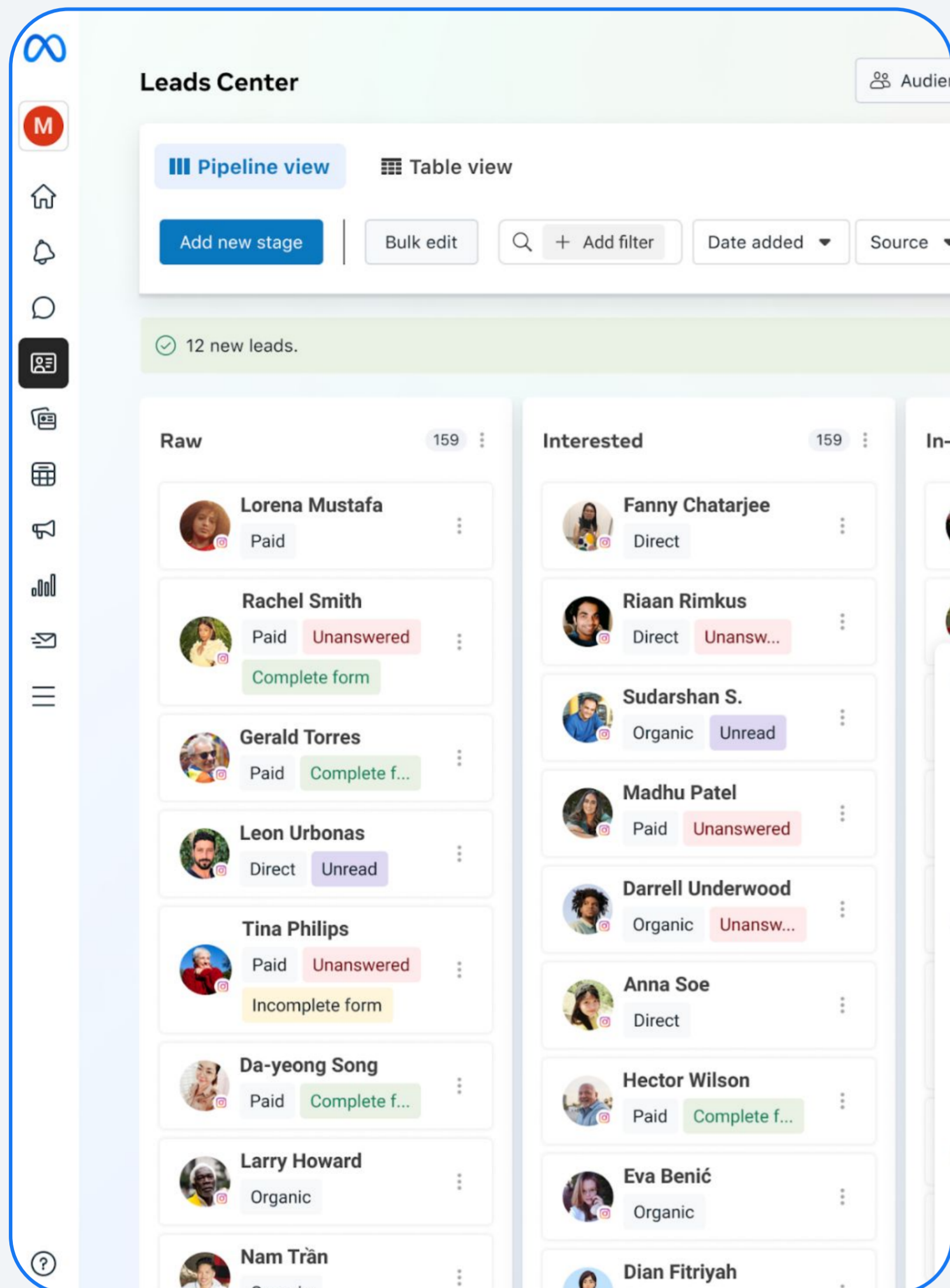
Meta has partnerships, integrations and free solutions that can help you manage and sync leads from Meta Business Suite.

- **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.

Professional services campaign set up overview

	ADS MANAGER	GET STARTED	OPTIMIZE
LEAD ACQUISITION			
Generate leads across multiple types of lead ads	Conversion location	Instant Form	1. Destination Optimization "Instant forms + Messenger"
		Website Form	1. Website form + Instant form add-on 2. Website form + call add-on
	Set up a measurement plan: Test conversion location setup compared to business as usual strategy • **BAU Cell:** Instant Forms | **Test Cell:** Destination Optimization "Instant forms + Messenger" • **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		
Optimize lead acquisition with automation and AI	Audience	Advantage+ audience*	
	Creative	Advantage+ creative Advantage+ catalog ads for lead generation (now compatible with Destination Optimization)	Advantage+ single step solutions from the get started column not already adopted
	Placement	Advantage+ placements	
	Budget	Advantage campaign budget	
	Set up a measurement plan.: Test how adopting Advantage+ features improve campaign performance [Example set up] **BAU Cell:** Website forms without Advantage+ range | **Test Cell:** Website forms with Advantage+ range		
LEAD QUALIFICATION			
Adjust the customer experience to drive different outcomes	Instant form customization	**Feature:** Gated content **Feature:** Conditional logic	**Form type:** rich creative or higher intent **Meta Verified:** to build credibility **Carousel ad creative with a map card:** to show store location
	Instant form performance goals	**Volume:** Leads **Quality:** Conversion leads	
	Set up a measurement plan: Test how using different Instant form features can improve campaign performance **BAU Cell:** Instant forms | **Test Cell:** Instant Forms + feature/form type		
Invest in your first-party data strategy	1. Instant forms with conversion leads performance goal 2. Website forms	1. Conversions API for CRM 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.
	Set up a measurement plan: Test the impact of Conversions API integration for CRM + Instant forms **BAU Cell:** lead ads performance goal | **Test Cell:** conversion lead ads performance goal		
LEAD NURTURING			
Follow up with new leads quickly and clearly	Instant form destination	**Branded calling:** Toggle on 'Display business information to encourage call pick up'	
LEAD MANAGEMENT			
Operationalize lead generation tasks	Automate lead retrieval via your CRM or Google Sheets. If you don't have a CRM, use Lead Center.		