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STRATEGY CHECKLIST

Offer for Sale
☐ Do you have a concise and detailed Meta business account?
☐ Does your Meta business account a verified account?
☐ Is there a need to improve in your target audience?
☐ Have you decided who the target audience for your Meta business account?
☐ Do you track the entire return on investment of your Meta business account?
☐ Have you made a budget and calculated your expenses and earnings?
Communication
☐ Have you planned at least one or more marketing strategies for your Meta business account campaign?
☐ Have you identified and investigated your competitors' marketing communications and deals?

CREATIVES CHECKLIST

General
☐ Creativity is intended to "pause the scroll" in your prospective customer.
☐ Colors with significant contrast are used in creativity.
☐ The logo is visible.

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| ☐ Copy and landing page creativity are important. |
| ☐ High Quality Creativity (both image and video) |
| ☐ Stories and Audience Network variations (9:16 and 1.91:1) are featured in each creative. |
| ☐ Faces or human figures are present, as is the product offered in the case of products. |
| ☐ It has a "attention-grabbing" text headline that allows the intended audience to relate to the content. |

Video Ads

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| ☐ The video can last up to 90 seconds for the feed and 60 seconds for Stories and Reels. |
| ☐ The video features easily readable subtitles. |
| ☐ The initial three seconds of the video are meant to draw in viewers. |

Copywriting

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| ☐ The ad text "in copy" is written to entice the reader. |
| ☐ Your text is organized into paragraphs and is easy to read. |
| ☐ Your copy has an enticing headline. |
| ☐ There are elements of trust (testimonials, a client list, and professional achievements). |
| ☐ Your copy's final call-to-action directs the user to the next stage of the funnel. |
| ☐ The copy suits the landing page and business proposal. |
| ☐ You employ "evergreen" copy models such as PAS or AIDA. |
| ☐ Do you know how to use artificial intelligence software to learn and get inspired? |
| ☐ Have you checked for grammatical and spelling errors? |
| ☐ Have you written customized copy for your retargeting campaign? |

TRACKING CHECKLIST

Pixel
☐ Have you created and allocated your Pixel to Facebook Ads Account?
☐ Have you installed the pixel (through HTML or C-API) on Facebook Ads Account?
☐ Have you configured the various conversion events?
☐ Have you utilized Facebook Pixel Helper to ensure that your installation is correct?
☐ Have you set up priority events in Event Manager?
☐ Have you validated your domain?
Attributions
☐ Have you configured UTMs for your campaigns?
☐ Are you utilizing Facebook's dynamic UTMs?
☐ Are UTMs reported on an external file in an orderly and legible manner?
☐ Have you created custom reports to help you make strategic decisions based on aggregate data?

CONVERSION CHECKLIST

Landing Page
☐ Does your landing page load quickly?
☐ Have you set up an SSL security certificate?
☐ Has the headline on your landing page been written in a way that is clear and concise?
☐ Does your landing page adequately describe the advantages of your company's product or service?
☐ Does your landing page accurately describe the features of your product/service?
☐ Have you incorporated any Trust or Testimonial elements?

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| ☐ Are there calls to action in each section? |
| ☐ Is your landing page relevant to your business offer? |
| ☐ Is your landing page consistent with the advertisements? |
| ☐ Does the contact form offer an easy-to-use interface? |
| ☐ Does the thank-you page explicitly explain to the user what will happen following conversion? |

Lead Management

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| ☐ Is the contact immediately notified of the conversion? |
| ☐ Do you have a follow-up email workflow set up? |
| ☐ Will the lead be handled in 24 or 48 hours? |
| ☐ Do you manage your contacts in GoogleSheet or in a CRM? |
| ☐ Are you familiar with your sales KPIs utilizing a control grid? |

AD ACCOUNT SETUP CHECKLIST

General

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| ☐ Have you created a Meta business manager with advertising accounts, pages, and other assets? |
| ☐ Have you enabled 2FA on your personal profile and Business Manager? |
| ☐ Is your business manager supported by at least two administrators? |
| ☐ Do you have a backup advertising account? |
| ☐ Have you added a backup payment method to your account? |
| ☐ Are there any previous employees or partners who should be denied access? |

Campaigns

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| ☐ Do you understand Facebook Ads Policies correctly? |
| ☐ Do you understand the objectives of Facebook campaigns? |

- ☐ Do you fully get the distinctions between ABO and CBO?
- ☐ Do you understand the distinction between a delivery algorithm and a testing algorithm?
- ☐ You are familiar with the auction mechanism and the distinction between automatic and manual bidding.
- ☐ Have you created a campaign to test your audience's and your creativity?
- ☐ Have you created a prospecting campaign using the most effective ad/audience combinations?
- ☐ Have you developed a retargeting strategy for warm and hot audiences?
- ☐ Have you created a personalized dashboard to analyze the most critical metrics?

Ad Sets

- ☐ Have you accurately specified the target of your ad sets?
- ☐ Do ad sets have enough money to get out of the learning phase?
- ☐ Are you opting for automated campaign placement?
- ☐ Have you thoroughly defined your target demographic?
- ☐ Do you employ interest-based targeting?
- ☐ Are you capitalizing on Lookalike audiences?
- ☐ Is the audience diverse enough?
- ☐ Do you use Custom Audiences for retargeting?
- ☐ Have you properly configured audience exclusions in your campaigns?

Ads

- ☐ Do you know about dynamic advertisements and do you use them for testing?
- ☐ Are your prospecting initiatives utilizing static post and ad IDs?

Optimization

- ☐ Is there a consistent campaign naming convention in the account?
- ☐ Is there a clear naming convention for ad sets in the account?
- ☐ Is there a defined naming convention for ads in the account?

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| ☐ Is the average frequency of prospecting campaigns healthy? |
| ☐ Is the average frequency of remarketing campaigns healthy? |
| ☐ Is there auction overlap in your top spending ad sets? |
| ☐ Is the funding properly allocated to prospecting, remarketing, and creative testing? |
| ☐ Have you planned a testing process for your creatives? |
| ☐ Have you prepared one or more funnel-side A/B tests to improve performance? |