WEB GROWTH HUB

FREE META ADS CHECKLIST

YOUR ADS.
FULLY CONNECTED.

Meta Instant Form Ads

A clear, step-by-step guide to launch, connect your CRM, and understand what happens after a lead submits.

THE SYSTEM YOU ARE BUILDING

01 Attract the right person

02 Capture and follow up with the lead

03 Measure meaningful outcomes

START HERE

Your setup roadmap

THE OBJECTIVE

Launch Meta Instant Form ads that collect inquiries inside Facebook or Instagram, deliver them into Web Growth Hub, and trigger a dependable follow-up process.

WHAT YOU NEED BEFORE STARTING

- A Facebook Page and access to its Meta Business Portfolio
- An ad account with billing configured
- A Web Growth Hub account and your privacy policy URL

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STEP 01 / META ACCESS

Connect your business assets

Your Meta business portfolio, Page and ad account establish who owns and runs the ads.

WHAT IT IS

A Business Portfolio groups assets such as Pages, Instagram accounts and ad accounts.

WHY IT MATTERS

Correct access prevents connection failures and protects business ownership.

WHERE TO GO

business.facebook.com > Settings / Business settings

SETUP CHECKLIST

- [ ] Confirm the correct Business Portfolio and Facebook Page.
- [ ] Connect an Instagram professional account if used.
- [ ] Check ad account permissions, billing and Page lead access.

QUICK QUESTION / Can I use my personal Facebook profile?

Your profile is used to sign in, but ads should run from the business-owned assets.

STEP 02 / CAMPAIGN SETUP

Build the lead campaign

Choose the audience and tell Meta what action you want people to take.

WHAT IT IS

A Leads campaign using Instant Forms lets someone submit details without leaving Meta.

WHY IT MATTERS

The ad finds interested people; the form captures their information for your team.

WHERE TO GO

adsmanager.facebook.com > Create > Leads

SETUP CHECKLIST

- [ ] Select Instant Forms as the conversion location.
- [ ] Set location, audience, placements, schedule and budget.
- [ ] Choose the correct Page, creative and call to action.

QUICK QUESTION / Do I need a website for this?

No. Instant Forms collect submissions inside Facebook or Instagram.

STEP 03 / INSTANT FORMS

Create a useful lead form

Collect enough information to follow up, without making the form unnecessarily long.

WHAT IT IS

An Instant Form is the short questionnaire people see after tapping your ad.

WHY IT MATTERS

Good questions help identify fit; too many questions may reduce completions.

WHERE TO GO

Ads Manager > Ad > Instant Form > Create

SETUP CHECKLIST

- [ ] Ask for name and a reliable contact method.
- [ ] Add 1-3 qualification questions where useful.
- [ ] Add your privacy policy URL and review the thank-you screen.

QUICK QUESTION / Should I use more questions?

Only ask what helps you qualify or contact the lead. Balance volume with quality.

STEP 04 / CRM CONNECTION

Send leads to Web Growth Hub

Make each new submission appear in your contact database without manual exports.

WHAT IT IS

The Facebook integration syncs Instant Form responses into Web Growth Hub.

WHY IT MATTERS

Without a reliable sync, paid leads can sit unseen in Meta and miss follow-up.

WHERE TO GO

Web Growth Hub > Settings > Integrations > Facebook

SETUP CHECKLIST

- [ ] Connect the correct Facebook Page and authorize access.
- [ ] Open Facebook Form Field Mapping and map each field.
- [ ] Submit a test lead and confirm the contact is created.

QUICK QUESTION / Why does field mapping matter?

It puts phone numbers, emails and answers in the correct CRM fields so automations can use them.

STEP 05 / FOLLOW-UP

Automate the next step

Capture is only half the job: your team needs a clear process to respond.

WHAT IT IS

A workflow starts when a new Facebook lead is received and performs selected actions.

WHY IT MATTERS

Quick, consistent follow-up helps prevent leads from being overlooked.

WHERE TO GO

Web Growth Hub > Automation > Workflows

SETUP CHECKLIST

- [ ] Use the Facebook Lead Form Submitted trigger.
- [ ] Add an internal notification, owner assignment and pipeline stage.
- [ ] Configure consent-appropriate messages and test the workflow.

QUICK QUESTION / Will every lead get the same message?

You can filter by Page or form and personalize messages with captured fields.

STEP 06 / QUALITY SIGNALS

Track outcomes beyond the form

Learn which campaigns produce appointments and customers, not just submissions.

WHAT IT IS

Conversions API can send supported CRM outcomes back to Meta, when configured.

WHY IT MATTERS

Later-stage feedback can help measure lead quality and support optimization.

WHERE TO GO

Web Growth Hub > Automation > Workflows / Meta CAPI action

SETUP CHECKLIST

- [ ] Define meaningful stages such as qualified, booked and won.
- [ ] Confirm supported dataset, event mapping and match identifiers.
- [ ] Test event delivery in Meta Events Manager before relying on it.

QUICK QUESTION / Is a Pixel required for Instant Forms?

No website Pixel is needed to collect Instant Form leads. CRM conversion feedback is a separate, advanced step.

FINAL STEP

Test the full journey

Before spending your budget, follow the same path a real customer would take.

- [ ] Check the correct ad account, Page, budget and geography.
- [ ] Open the ad destination or Meta Instant Form on mobile.
- [ ] Submit a test lead using permitted test information.
- [ ] Confirm the contact appears in Web Growth Hub.
- [ ] Verify assignment, notifications and follow-up workflow.
- [ ] Confirm relevant events appear in Meta Events Manager.
- [ ] For website ads, also check GA4 traffic and UTM reporting.

THE BIG PICTURE

The ad creates interest. Your form or website captures it. Web Growth Hub organizes the lead and follow-up. Tracking helps you understand what happened next.

Need help connecting the pieces? webgrowthhub.com