

The ultimate pre-launch Checklist for your Facebook Campaigns



Using spreadsheets to create a pre-launch Facebook campaign checklist



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Introduction

As a Facebook advertiser and a PPC professional in general, you know the importance of Excel. Although typically you use spreadsheets for analysing your campaigns' performance, there are more ways of using spreadsheets and creating a checklist is one of them.

It gives you a birds view on all the tasks you need to cross off your list prior to hitting **LAUNCH**.

By following this guide you will be able to create a checklist with all necessary Facebook Campaign-related tasks organised in task groups that you can tick off one by one as you implement your Facebook strategy.

This guide is the first part of the How to use Spreadsheets in Facebook PPC, and will assist you in creating a Pre-launch Facebook Campaign checklist. As a bonus, you will get a link to the excel sheet created that you can copy and edit to tailor to your needs.

Creating your pre-launch checklist

Whether you own an e-shop or a website offering services or even a blogger you will find checklists really useful. You can set up all Facebook-related tasks as checklist items with a checkbox next to them. Before taking your campaign live be sure to go through the listed tasks and check the items that you have implemented.

Creating checklists with spreadsheets is quite easy. If you are using Microsoft's spreadsheet software, Excel, you first need to activate the Developer Tab in your Microsoft Excel workbook. If you are working with Google Sheets, you can insert checkboxes via the Insert menu.

Level of Excel needed: Basic

Formulas and "elements" needed: IF and checkboxes

Organising tasks into groups

The first thing you will want to do is identify the tasks you need done and then organising them into groups. Be sure to contact any relevant department evolved with any aspect of Facebook Ads creation. Such departments can be the copywriters, the graphic designers, the head of the marketing department or client if you are in an agency.

Below are the group of tasks that need to be performed every time you start a Facebook Campaign.

- 1. Facebook Assets and configuration**
- 2. Creative (banners, images, video)**
- 3. Ad copy**
- 4. Basic Facebook Pixel Events and configuration**
- 5. Dynamic Product Ads- related events and configuration**
- 6. Audience Creation**
- 7. Budget**

1. Facebook Assets and configuration

If it's the first time creating Facebook campaigns you need to have an Ad Account, a Facebook Page and a Payment Method set up. If you will be working with an agency, in addition to the previous, you need to have a Business Manager in place. Each of these tasks may serve as an item on your checklist that you can cross-off once you implement them.

Facebook Assets and configuration checklist	Do you have an Ad Account in place?	<input type="checkbox"/>
	Do you have a Facebook Page in place?	<input type="checkbox"/>
	Do you have a payment method setup?	<input type="checkbox"/>
	Do you have a Business Manager in place?*	<input type="checkbox"/>

2. Creative (banners, images, video)

Creatives play a very important aspect to your Facebook Ad's success. Whether you are using videos, images, gifs etc. you need to make sure that you have the right specifications. The last thing you want is to find out that your creatives are incompatible to the ad formats you chose. This may mean that you have to postpone launching your campaigns.

One important thing to have in mind is the amount of text used in your Facebook Ad creatives. Although Facebook does allow images with more than 20% text, you may want to be cautious with that since too much text will lead to low to none delivery of your ads.

Facebook has a great tool that helps you see whether your images adhere to the 20% text rule which you can find [here](#).

Creative (banners, images, video) checklist	Are your creatives in the right size?	<input type="checkbox"/>
	Do your creatives meet the 20% text restriction?***	<input type="checkbox"/>

3. Ad copy

Another aspect of a successful Facebook Ad; the Ad copy. Besides crafting engaging copy that will help convince your target audience into taking the desired action (conversion) you need to be mindful of not only what you say, but how you say it. Often times, the wording used in your ads may cause them to get disapproved by Facebook.

Be sure to check [Facebook's rules](#) in regards to ad copy to ensure their compliance.

Ad copy checklist

Is your ad copy compliant with Facebook's rules?



4. Basic Facebook Pixel Events and configuration

Facebook Pixel is a piece of code that you place on your website that lets you measure, optimise and build audiences for your advertising campaigns. Facebook helps track actions on your site that you care about (aka conversions), these events can be later used when optimising your campaign's delivery. Depending on the type of website you have and your marketing needs you will need to implement different events.

After implementing the events on your website do take a test tour to make sure that all desired events fire as expected. One great tool that can help you with this is Facebook Pixel Helper. It is a Google Chrome extension that helps you verify that the events fire up correctly and that the right information is passed on. You can find more information on Facebook Pixel Helper along with common troubleshooting errors [here](#).

Basic Facebook Pixel Events and configuration checklist	Do you have a Facebook Pixel set up?	<input type="checkbox"/>
	PageView	<input type="checkbox"/>
	Lead***	<input type="checkbox"/>
	CompleteRegistration***	<input type="checkbox"/>
	ViewContent	<input type="checkbox"/>
	AddToCart	<input type="checkbox"/>
	InitiateCheckout	<input type="checkbox"/>
	Purchase	<input type="checkbox"/>
	Have you confirmed that the pixel is installed properly?	<input type="checkbox"/>

5. Dynamic Product Ads-related events and configuration

If you are an eshop then chances are that you are running Dynamic Product Ads. Dynamic Product Ads, aka DPAs, require a special set of Facebook Pixel events to be implemented (usually ViewContent, AddToCart, Purchase etc.) in order to personalise the ad shown to your target audience and increase conversion rate.

Before running DPAs you will need to:

- a. **Create a product catalogue and include a list of the products you want available for ads.**
- b. **Connect your Facebook Pixel to the Product Catalogue**
- c. **Check that the Facebook Pixel events show up in your Ads Manager.**

Although Facebook's product catalogue is intended for E-commerce, Travel (including hotels, flights and destinations), Real estate and Auto, if you are creative, you can use them in any industry no matter the product you sell.

Dynamic Product Ads-related events and configuration checklist	Have you set up your product catalogue(s)? ****	<input type="checkbox"/>
	Have you connected your pixel with the product catalogues?	<input type="checkbox"/>
	Do the events show up in Ads Manager?	<input type="checkbox"/>

6. Audience Creation

You may have crafted the best ad copy and designed the most thumb-stopping creative but the truth of the matter is that these won't guarantee a successful ad if you are targeting the wrong audience. Do take your time to list the audiences you need to target your ads to. Ideally you will want to use your customer lists and create Lookalike Audiences based on them. For your remarketing campaigns, you can create Website and Engagement Custom Audiences. These people are lower in your funnel, they already know you and have already been to your website. This means that they need less "convincing" than people in your cold audience.

Audience Creation checklist	Have you uploaded your customer/subscriber list to Ads Manager?	<input type="checkbox"/>
	Have you created your Website Custom Audience and/or Engagement Custom Audience?	<input type="checkbox"/>
	Have you created Lookalike Audience based on the above lists/audiences?	<input type="checkbox"/>

7. Budget

Budget has a very big impact on the results your Facebook Campaigns get. You may have everything set up correctly, created the perfect ads and target the right audience but your campaign's performance gets stumped by your budget. Do take some time to look at any past data, if you have any, or decide how much a conversion is worth to you.

Budget checklist	Have you confirmed the budget you'll be allocating to the campaigns?	<input type="checkbox"/>
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Optimise your checklist for greatness

Now that you created your checklist you can take it to the next level by having a column that will link to all the resources you and your team needs to ensure that you set your best foot forward.

We added a notes column, next to the column with the check-boxes. The end results looks like this:

Pre-launch Facebook campaign checklist

Facebook Assets and configuration checklist	Do you have an Ad Account in place?	<input type="checkbox"/>	Please set up an Ad Account
	Do you have a Facebook Page in place?	<input type="checkbox"/>	Please set up a Facebook Page
	Do you have a payment method setup?	<input type="checkbox"/>	Please check the section: Add a payment method to your ad account
	Do you have a Business Manager in place?*	<input type="checkbox"/>	Please set up a Business Manager
Creative (banners, images, video) checklist	Are your creatives in the right size?	<input type="checkbox"/>	Please make sure your creative's specs meet the requirements
	Do your creatives meet the 20% text restriction? **	<input type="checkbox"/>	Please make sure your creatives meet the <20% restriction
Ad copy checklist	Is your ad copy compliant with Facebook's rules?	<input type="checkbox"/>	Please check the section: It is not only WHAT you promote, but also HOW at the How not to get you ad disapproved by Facebook
Basic Facebook Pixel Events and configuration checklist	Do you have a Facebook Pixel set up?	<input type="checkbox"/>	Please set up a Facebook Pixel
	PageView	<input type="checkbox"/>	Please set up a Facebook Pixel
	Lead***	<input type="checkbox"/>	Please set up a Facebook Pixel
	CompleteRegistration***	<input type="checkbox"/>	Please set up a Facebook Pixel
	ViewContent	<input type="checkbox"/>	Please set up the necessary pixel events
	AddToCart	<input type="checkbox"/>	Please set up the necessary pixel events
	InitiateCheckout	<input type="checkbox"/>	Please set up the necessary pixel events
	Purchase	<input type="checkbox"/>	Please set up the necessary pixel events
Dynamic Product Ad-related events and configuration checklist	Have you confirmed that the pixel is installed properly?	<input type="checkbox"/>	Please install Pixel Helper
	Have you set up your product catalogue(s)? ****	<input type="checkbox"/>	Please set up your product catalogue(s)
	Have you connected your pixel with the product catalogues?	<input type="checkbox"/>	You need to connect your pixel to the product catalogue
	Do the events show up in Ads Manager?	<input type="checkbox"/>	Please make sure that the events are showing
Audience Creation checklist	Have you uploaded your customer/subscriber list to Ads Manager?	<input type="checkbox"/>	Please make sure that you have uploaded your customer and/or subscriber lists
	Have you created your Website Custom Audience and/or Engagement Custom audience?	<input type="checkbox"/>	Please make sure that you have created the necessary custom audiences
	Have you created Lookalike Audience based on the above lists/audiences?	<input type="checkbox"/>	Please make sure that you have created the necessary Lookalike audiences
Budget checklist	Have you confirmed the budget you'll be allocating to the campaigns?	<input type="checkbox"/>	Please make sure that you have calculated the budget you want to allocate to your campaigns
Total items checked		You got 0 out of 23 checked	
Am I ready to LAUNCH my awesome campaigns?		Eeeeh! You should consider fixing the issues above 😞!	
* Necessary for: Running Dynamic ads or working with an agency	** Necessary for: ensuring that you don't limit your ad's delivery	*** Necessary for: when someone signs up for a trial or completes a subscription respectively	**** Necessary for: Dynamic ads, Collection ads or Product tagging for Facebook Pages

I have set up the following formula: **=if(B4=true,"Great","You need to set up a pixel <https://developers.facebook.com/docs/ads-for-websites/pixel-events/v3.0>")**

This formula checks if the checkbox is checked (has a value of "TRUE"). If yes, then it displays the message "Great", if no, then it informs you of the resources you need to check in order to complete this task along with a link to it.

This can be great if there are working with, say, a programmer (or any other team member) because it allows you to send them the link to the events you need implemented!

Bonus

This guide showed you how to create a pre launch checklist for your Facebook campaigns taking into account all the necessary tasks required prior to launching your ads.

You can view and download the excel file [here](#).

