



Meta Ads Optimization

# Checklist for SaaS & Tech Companies



*“Hello! I’m Vitalii Petukhov, the PPC Manager at Aimers. Regular audits are crucial for the success of your Meta Ads campaigns. Without constant monitoring and fine-tuning, you risk underperforming and wasting resources. Regular audits and strategic adjustments are key to impressive results.*

*Our team has seen how regular audits can significantly improve campaign performance. By identifying and resolving issues early, we’ve helped clients save costs and increase conversion rates.*

*To help you maintain optimal performance, we’ve compiled a comprehensive Meta Ads checklist. It covers critical areas like tracking conversions, setting up audiences, and optimizing ad creatives, with detailed guidance on identifying and solving potential problems.*

*Don’t let overlooked details hold back your success. Start using our checklist today and take control of your Meta Ads performance!*

*Feel free to reach out with any questions.*

*We’re here to help you maximize your advertising efforts.”*

**Vitalii Petukhov**

PPC Manager at Aimers

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# Conversion Tracking

✓ Conversions are being tracked

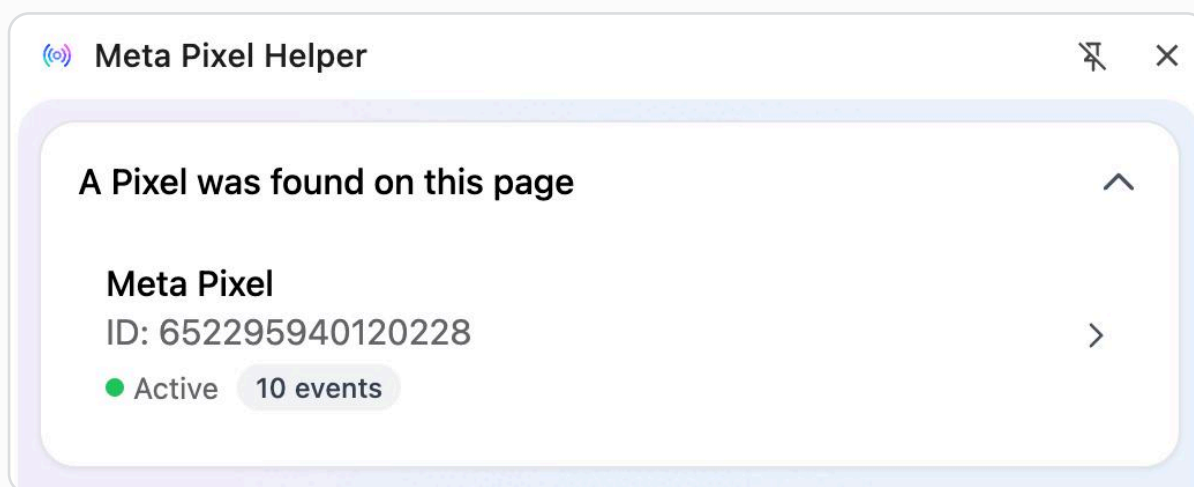
Tracking conversions is crucial for measuring the effectiveness of your ads and understanding how they contribute to your business goals. Without conversion tracking, you won't know which ads are driving actions like purchases, sign-ups, or downloads.

To ensure conversions are being tracked, set up the correct conversion events in Meta Ads Manager and verify that they fire properly through your website or lead flow. Regularly review Events Manager and analytics tools to confirm that conversion data is being recorded accurately.

✓ Pixel is installed and working correctly

The Meta Pixel is a piece of code that tracks visitor actions on your website, providing valuable data to optimize ads and retarget audiences. An improperly installed or malfunctioning pixel can lead to inaccurate data collection and ineffective ad targeting.

To verify the pixel is installed and working correctly, use the Meta Pixel Helper extension in your browser. Check that the pixel fires correctly on key pages and events. Test different user interactions to ensure all relevant data points are captured.



## ✓ Conversions are linked to events, not to page visits

Tracking conversions based on specific events (e.g., button clicks, form submissions) rather than simple page visits provides a more precise understanding of user actions and ad effectiveness. This granularity helps in optimizing ad campaigns for actual user behavior.

To implement this, define and set up event-based tracking in your Meta Pixel settings. Use the Event Setup Tool to configure events like "Add to Cart," "Purchase," or "Lead," ensuring they trigger correctly on your site.

### Event setup

Manage features related to how your events are setup.

Open event setup tool

### Track events automatically without code

Off

Your dataset can find and report on valuable website events, such as purchases or registrations, based on your site traffic, button text and page metadata. This feature can help you set up events without having to install code. You can choose to turn this functionality on or off. [Learn more](#)

## ✓ Custom conversions are set up

Custom conversions allow you to track and optimize for specific actions that are most relevant to your business goals, such as reaching a specific page or completing a unique action. Without custom conversions, you might miss out on critical insights and optimization opportunities.

To set up custom conversions, go to the Meta Events Manager, select 'Custom Conversions,' and define your conversion rules based on URL parameters or specific events.

Conversions can also be implemented by manually coding them into the website, setting up tags in GTM, additional integrations, and by using the offline conversion tracking method. In such cases, it is important to check the settings within these tools to ensure everything is transmitted correctly.

Additionally, it is useful to have more data in the account and to set up the Meta Conversion API. This can be done manually or through additional integrations with just a few clicks, using tools like [stape.io](#) and others.

✓ CRM downstream events are sent back to Meta as offline conversions

For B2B SaaS, optimizing toward form fills alone is not enough. Meta performs best when it receives signals tied to actual revenue – Sales Qualified Leads, opportunities created, demo bookings, and closed-won deals. Without this data, the algorithm finds users who fill out forms, not users who buy.

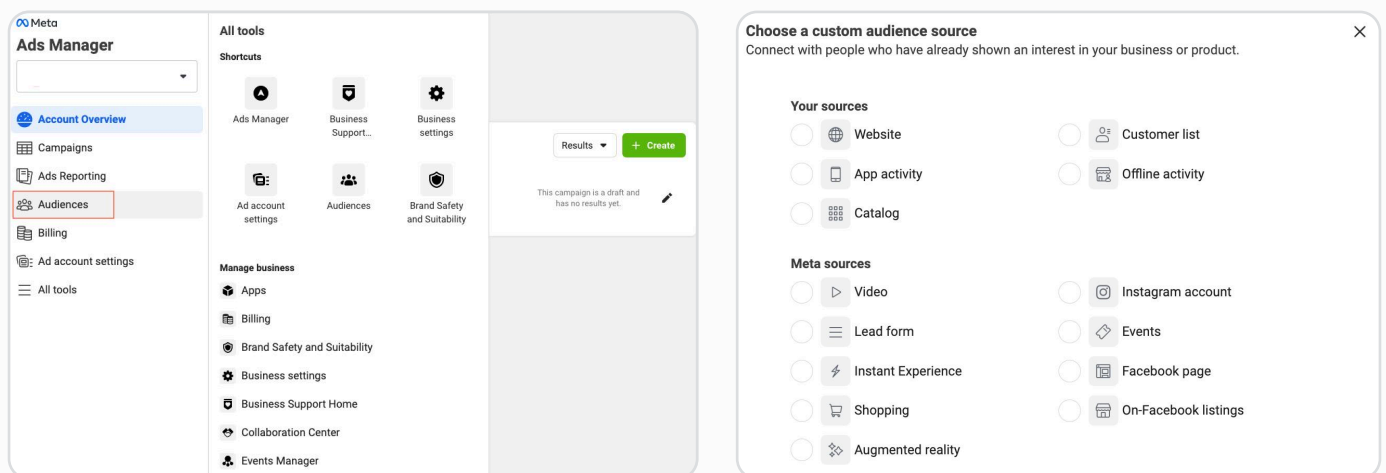
To audit this, check whether your CRM is integrated with Meta and actively sending downstream conversion events back to the platform. This closes the loop between ad spend and pipeline, and gives Meta the quality signals it needs to find more of your best customers.

# Account Structure

✓ Audience signals, exclusions, and remarketing inputs are set up correctly

A strong Meta Ads account structure is built not only around manual audience targeting, but also around the right signals and exclusions. This includes remarketing audiences, customer lists, recent converters, and any exclusions needed to avoid wasted spend and audience overlap.

To audit this, check whether your audience setup supports both prospecting and remarketing, and whether existing customers, leads, and recent conversions are excluded where appropriate.



✓ Targeting automation is used intentionally, not switched off by default

Meta's delivery system now relies much more on automation than it did a few years ago. With technologies such as Advantage+ audience and the Andromeda retrieval engine, Meta can often identify relevant users beyond narrow manual targeting.

To audit this, review whether audience automation is being used deliberately based on campaign goals, funnel stage, and lead quality requirements. Keep the necessary controls and exclusions in place, but avoid over-restricting delivery without clear performance reasons.

### ✔ **Advantage+ audience** ✦

We'll automatically show ads to people most likely to respond. We'll show ads to people matching your suggestion, and other audiences when it's likely to improve performance.

### ✔ **The account structure supports the funnel without over-fragmenting delivery**

Organizing campaigns around TOFU, MOFU, and BOFU is still useful, especially for SaaS and Tech companies. However, the structure should not become so fragmented that campaigns lose volume, overlap too much, or limit Meta's ability to optimize delivery.

To audit this, check whether funnel stages are reflected in messaging, offers, exclusions, and conversion goals, while avoiding unnecessary duplication and overly narrow audience splits.

### ✔ **Account settings do not restrict learning unnecessarily**

A well-structured account should give Meta enough data and flexibility to learn. Too many edits, low-volume ad sets, or overly narrow setups can lead to unstable delivery and "learning limited" issues.

To audit this, review whether budgets, conversion goals, and campaign structure give each ad set a realistic chance to generate enough optimization events and move through the learning phase efficiently.

# Campaign Settings

## ✓ Campaign goal or primary conversion selected correctly

Selecting the correct campaign goal or primary conversion is essential for ensuring your ad objectives align with your business goals. Choosing the wrong objective can lead to suboptimal ad performance and wasted budget.

To verify this, review your campaign settings in Ads Manager and ensure the chosen objective matches your desired outcome, such as sales, leads, engagement, app promotion, traffic, or awareness. Adjust your settings if necessary to reflect the primary action you want users to take.

Create new campaign New ad set or ad

Choose a buying type ⓘ  
Auction

Choose a campaign objective

- Awareness
- Traffic
- Engagement
- Leads
- App promotion
- Sales

**Leads**  
Collect leads for your business or brand.

**Good for:**

- Website and instant forms
- Instant forms
- Messenger, Instagram and WhatsApp
- Conversions
- Calls

About campaign objectives Cancel Continue

## ✓ Bid strategy and performance controls match the campaign goal

Choosing the right bid strategy and performance controls is essential for balancing scale and efficiency. A strategy that works well for growth campaigns may not be the best option for campaigns focused on profitability, lead quality, or conversion value.

To audit this, review whether your bidding approach matches the campaign objective and business goal. Use broader volume-focused delivery when scale is the priority, and apply tighter controls when efficiency, value, or lead quality matters more.

✓ Audience controls and exclusions match the campaign objective

Audience controls should reflect the campaign goal, funnel stage, and lead quality requirements. In some campaigns, broader delivery helps Meta find more efficient conversions, while in others, stricter exclusions and tighter controls are more effective.

To audit this, review whether location, age settings, customer exclusions, and remarketing exclusions are aligned with the campaign objective and whether they support efficient delivery without over-restricting the audience.

✓ Website visitors, form fillers, and current customers are excluded

Excluding website visitors, form fillers, and current customers from certain campaigns prevents ad fatigue and ensures you are not spending budget on users who have already converted. This helps in optimizing your ad spend and reaching new potential customers.

To set up exclusions, create custom audiences of these groups in Audience Manager, then apply these audiences as exclusions in your ad set targeting settings. Regularly update your exclusion lists to keep them accurate and effective.

The screenshot shows the 'Custom audiences' interface in Audience Manager. At the top right, there is a 'Create new' button with a dropdown arrow. Below this, the 'Include' section is active, showing 'Include people who are in at least one of the following' with a search input field containing 'Search existing audiences'. Below the 'Include' section, the 'Exclude' section is highlighted with a red border, showing 'Exclude people who are in at least one of the following' with a search input field containing 'Search existing audiences'.

✓ Audience Network is excluded from B2B lead generation campaigns

Audience Network placements, ads served across third-party apps and websites outside of Facebook and Instagram, typically deliver significantly lower lead quality for B2B SaaS campaigns. Traffic from these placements is harder to qualify and often inflates lead volume without contributing to pipeline.

To audit this, check your placement settings in active lead generation campaigns and confirm that Audience Network is excluded. Facebook Feed and Instagram Feed/Stories remain the strongest placements for B2B audiences.

# Ads Settings

✓ **There is enough creative variety for Meta to optimize delivery**

Meta's delivery system increasingly relies on automation to match ads with the right people. With technologies such as Advantage+ creative and the Andromeda retrieval engine, Meta can evaluate a much larger pool of eligible ads and creative combinations. This means creative variety is no longer just a testing tactic - it is an important input for delivery and performance.

To audit this, check whether each ad set **includes meaningfully different creative angles, formats, hooks, and messages rather than minor variations of the same ad**. Use a mix of images, videos, copy approaches, and offers so Meta has enough combinations to test across audiences and placements.

✓ **Creatives are adapted for placements and flexible formats**

Creative assets should work well across placements, formats, and surfaces within Meta. Proper sizing still matters, but modern ad delivery also depends on whether your creatives are flexible enough for Stories, Reels, Feed, and other placements where Meta may optimize delivery automatically.

To audit this, check whether your ads use suitable aspect ratios, clear visual hierarchy, mobile-first layouts, and creative formats that can perform well across multiple placements. Where relevant, use flexible ad format or creative automation tools to give Meta more options for optimization.

Pay particular attention to Instagram Reels, and rewards content that drives early engagement signals like replays and shares. Reels require 9:16 vertical video, should run 15-60 seconds, and must hook the viewer within the first 3 seconds. For B2B SaaS, Reels work best at TOFU, use them to build awareness and brand familiarity before retargeting with more direct offers.

## ✓ Lead forms collect the information needed to qualify leads

Lead forms should capture the information your sales team needs to assess lead quality and prioritize follow-up. If the form is too generic, Meta may deliver a high volume of leads that are difficult to qualify.

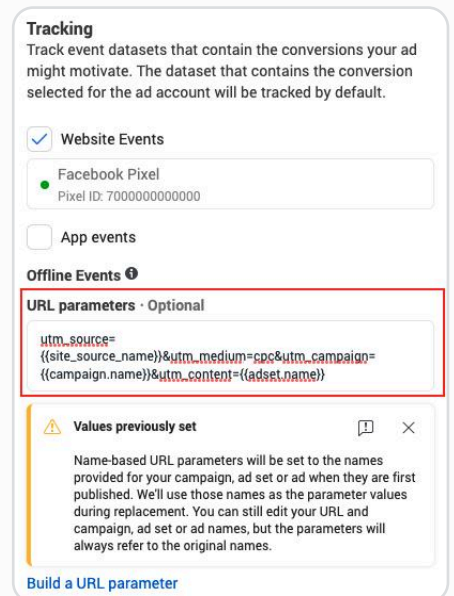
To audit this, check whether your lead forms include the fields that help evaluate fit, such as company size, job title, industry, budget, or service interest, while keeping the form short enough to maintain completion rates.

For B2B campaigns, also check whether your lead forms require a work email address. Meta now offers this as an optional form setting, and enabling it is one of the fastest ways to improve lead quality, personal email submissions typically correlate with significantly lower sales qualification rates.

## ✓ UTM tags are set up

UTM tags help connect Meta Ads performance with external analytics and CRM data. Without them, it becomes harder to understand which campaigns, ads, and messages actually drive qualified traffic and conversions.

To audit this, check whether all ad URLs use a consistent UTM structure with source, medium, campaign, and content parameters that match your reporting framework.



The screenshot shows the 'Tracking' section of a Meta Ads account. It includes options for 'Website Events' (checked) and 'App events' (unchecked). Under 'Offline Events', the 'URL parameters - Optional' field is highlighted with a red box and contains the following code: `utm_source={{site_source_name}}&utm_medium=cpc&utm_campaign={{campaign.name}}&utm_content={{adset.name}}`. Below this, a warning message states: 'Values previously set: Name-based URL parameters will be set to the names provided for your campaign, ad set or ad when they are first published. We'll use those names as the parameter values during replacement. You can still edit your URL and campaign, ad set or ad names, but the parameters will always refer to the original names.' A 'Build a URL parameter' link is visible at the bottom.

## ✓ Creative testing includes different concepts, not just small edits

Strong Meta Ads testing should go beyond minor changes to headlines, colors, or buttons. To find what actually improves performance, test meaningfully different creative concepts, including value propositions, pain points, proof points, offers, CTA styles, and formats.

To audit this, check whether your active tests compare distinct messages and creative approaches rather than cosmetic variations of the same ad.

# Analytics & Reporting

✓ Performance imbalances by GEO, gender, age, and placement are monitored and addressed

Imbalances in your ad performance statistics can indicate that certain demographics or placements are underperforming, leading to inefficient budget allocation. Monitoring and addressing these imbalances ensures your ads are effectively reaching all target segments.

To manage this, regularly analyze your ad performance by geography, gender, age, and placement in Meta Ads Manager. Adjust your targeting and bid strategies to address any significant imbalances, optimizing your ad spend for better overall performance.

✓ Performance is analyzed by meaningful audience segments

Segmenting reporting by audience type helps identify where your performance is strongest and where delivery quality drops. However, this does not always mean every audience needs a separate campaign or ad set.

To audit this, review performance by prospecting, remarketing, customer, demographic, and placement segments where relevant, and use that data to refine messaging, exclusions, and budget allocation without creating unnecessary fragmentation.

# Insights from Aimers

## ✓ Monitor frequency together with signs of creative fatigue

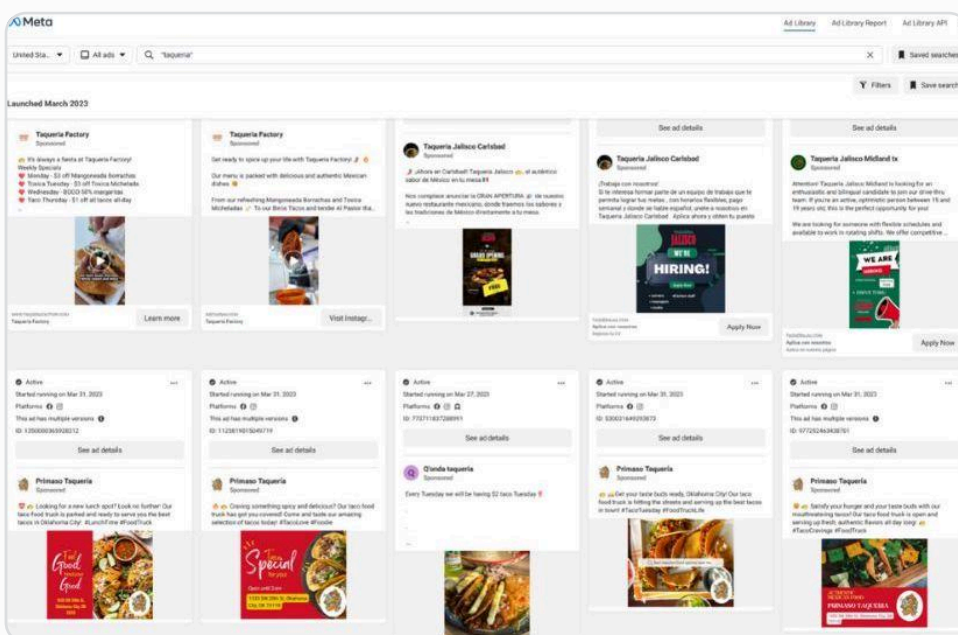
Frequency is an important signal, but there is no universal benchmark that works for every campaign. The right frequency depends on your audience size, funnel stage, sales cycle, and creative rotation.

Instead of judging frequency in isolation, review it together with CTR, CPL or CPA, reach, and signs of creative fatigue. If frequency keeps rising while performance weakens, refresh your creative, broaden your audience, or adjust your campaign structure.

## ✓ Regularly test your ad formats, CTAs, offers, and texts

Testing, testing, and testing again is an important step because it's impossible to accurately determine what will work best; you can only speculate. Test formats (videos, banners, carousels), CTAs, offers, and texts. Only through testing can you find the best combination.

To minimize costs on ineffective approaches, it's useful to use [the Meta Ad Library](#), where you can see what your potential competitors are using in your niche and what options could be effective.



✓ **Analyze attribution settings and compare platform data with CRM results**

Some of the biggest optimization wins come from reporting. One of the most useful tools in Meta Ads Manager is the Breakdown section, which helps identify differences in performance by geography, age, placement, device, and attribution.

It is also important to compare Meta-reported conversions with CRM and sales data. Differences often appear because Meta may credit view-through, click-through, or engage-through conversions differently from your internal reporting.

To audit this, use custom reports and attribution comparisons to understand how reporting changes under different settings, and make sure the attribution window you rely on matches your sales cycle and business reality.

**Attribution settings** ⓘ

**Click-through** ⓘ

7 days ▼

**Engage-through** ⓘ

None ▼

**View-through** ⓘ

None ▼

✓ **Avoid unnecessary edits and maintain delivery stability**

Meta campaigns often perform better when the system has enough time and data to learn. Frequent edits, unnecessary restarts, and constant restructuring can interrupt delivery and keep ad sets in the learning phase longer than needed.

Instead of duplicating campaigns by default, make structural changes only when there is a clear testing or scaling reason. Keep your setup stable long enough to evaluate performance properly.

This means your Meta strategy and your CRM hygiene are directly connected. Clean, consistent, timely CRM data fed back to Meta through the Conversions API is one of the highest-leverage improvements a B2B SaaS account can make – and most accounts haven't done it yet.

✓ **Feed the algorithm quality signals, not just volume**

The most common Meta optimization mistake in B2B SaaS is treating all leads as equal. Meta's delivery system learns from the signals you send back to it, if you optimize only for form fills, it finds people who fill out forms. If you connect CRM data and tell Meta which leads became SQLs, booked demos, or closed as customers, it starts finding more of those people instead.

✓ **Fill out the profile from which you are running ads**

Despite running an advertising campaign, the promotion itself happens under the name of the advertising profile (page), and users often click through to the page from which the ad is running. If your page is filled out, has activity, posts are published, and comments are left, this serves as social proof and generates more trust.

**Ready to Turn Your Meta  
Ads into a Pipeline Machine?**

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