

Meta Ads Onboarding Questionnaire

Facebook & Instagram Advertising | Please complete before your onboarding call

Business Name:		Date:	
Website URL:		Industry:	
Primary Contact:		Email:	

SECTION 1 -- Business & Brand Overview

Q1. Describe your business, products, and/or services.

Q2. Who is your ideal customer? Describe your target audience in detail.

i Include age range, gender, location, interests, income level, behaviours, and pain points.

Q3. Which locations should your ads target?

Specific City/Cities State / Region All India International

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Q4. What are your top 3 competitors? (Please list their Facebook/Instagram pages or website URLs)

Q5. What is your Unique Selling Proposition (USP)? Why should people choose you over competitors?

SECTION 2 -- Campaign Goals & Objectives

Q6. What is the primary goal of your Meta Ads campaign?

- Lead Generation Sales / Conversions Brand Awareness Traffic to Website
- App Installs Page Likes / Engagement Event Promotion Other

Q7. What action do you want users to take after seeing your ad?

- Fill a form / enquiry Make a purchase Call your business Visit your store

Q8. Do you have a landing page or specific URL for the campaign?

- Yes -- existing landing page Yes -- need a new one No -- using homepage Not sure

Q9. What does success look like for you? Define your KPIs.

i Examples: cost per lead, ROAS, number of purchases, reach, etc.

SECTION 3 -- Budget & Timeline

Q10. What is your monthly Meta Ads budget? (ad spend only, excluding management fees)

- Under Rs.10,000 Rs.10,000-30,000 Rs.30,000-75,000 Above Rs.75,000

Q11. Is your budget fixed or flexible based on performance?

- Fixed budget Flexible -- scale if performing well Not sure yet Need your recommendation

Q12. When do you want to launch your first campaign?

- As soon as possible Within 2 weeks Next month Specific date -- see below

Q13. Are there any seasonal peaks, promotions, or events we should plan campaigns around?

SECTION 4 -- Ad Creative & Content

Q14. Do you have existing creative assets (images, videos, graphics) for ads?

- Yes -- ready to use Yes -- need editing No -- need to create from scratch Partially available

Q15. What type of ad creative do you prefer or have available?

- Static image ads Video ads Carousel ads Stories / Reels

Q16. Describe your brand tone and voice. How should your ads communicate?

- Professional & formal Friendly & conversational Bold & energetic Luxury & premium

Q17. Do you have brand guidelines (logo, colours, fonts) we should follow?

- Yes -- will share Partially -- some assets available No -- please suggest Not sure

Q18. Are there any messages, claims, or visuals we should AVOID in your ads?

SECTION 5 -- Meta Account & Technical Setup

Q19. Do you have an existing Meta Business Manager / Ad Account?

- Yes -- active account Yes -- inactive account No -- need to set up Not sure

Q20. Is the Meta Pixel installed on your website?

- Yes -- verified and working Yes -- but not sure if working No Not sure

i If not installed, we will need website access to install it before launching campaigns.

Q21. Do you have a Facebook Business Page and Instagram account?

- Yes -- both Facebook only Instagram only Neither -- need to create

Q22. Do you have a product catalogue set up in Meta (for e-commerce / retargeting)?

- Yes No Not applicable Not sure

Q23. Have you run Meta Ads before? If yes, what worked and what did not?

- No -- first time Yes -- ran ourselves Yes -- via another agency Yes -- via freelancer agency

SECTION 6 -- Audience & Targeting

Q24. Do you have a Custom Audience (existing customer list, website visitors, app users)?

- Yes -- customer list available Yes -- website traffic (Pixel data) No Not sure

Q25. Are you interested in Lookalike Audiences to reach new people similar to your existing customers?

- Yes No Not sure -- explain the benefit

Q26. List any specific interests, behaviours, or demographics you want to target.

i Examples: fitness enthusiasts, new parents, small business owners, age 25-44, etc.

Q27. Are there any audiences or demographics you want to EXCLUDE from your ads?

SECTION 7 -- Access Checklist

Please share the following access before or during your onboarding call:

- Meta Business Manager -- add our email as Admin or Ad Account access
 - Facebook Business Page -- add our email as Editor or Admin
 - Instagram Account -- connected to the Business Manager
 - Website access -- for Pixel installation (if not already set up)
 - Brand assets folder -- logos, images, videos, brand guide (Google Drive / WeTransfer)
 - Existing customer list -- CSV file (name, email, phone) for Custom Audience creation
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Client Signature

Date

Thank you for completing this form. We will use your answers to craft a Meta Ads strategy built for your business goals.
