

# How to Generate Quality Finance Leads Through Facebook Advertising

*Tapping in to the newest and best kept secrets of online marketing within the financial services sector*

**18-Page Quick Practical Guide**

## Before we get started on the technical stuff...

As you may be aware, over a billion people per day use Facebook. Facebook has a greater reach into audiences than any TV station, and all newspapers combined.

But until recently it wasn't taken seriously as an effective marketing tool - it was seen as costly and undirected.

Not anymore! As accredited Facebook Marketing Consultants (FMC), we pay close attention to new technical features and ad creative formats as they become available to marketers. Not only do we take note, but we also like to share the information with our readers!

In the following pages, we will provide advice on best practice to ensure you make the most of Facebook advertising and are only generating quality leads for your financial services business!

*“Thanks to the Facebook campaigns managed by AccuraCast, we are way ahead of our marketing objective in terms of leads. We are now convinced that Facebook is a very interesting way to generate qualified leads.”*

Groupe

**Pierre & Vacances**  
*CenterParcs*

Talk to us about improving your results:  
[0800 0196813](tel:08000196813) or [hello@accuracast.com](mailto:hello@accuracast.com)



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AccuraCast is London's leading digital marketing agency and the longest-running independent agency in the UK. We offer multilingual marketing services that are always 100% ethical.

We're also in Madrid! Find out how we can help you.

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## Before we start, a bit about AccuraCast ...















































We specialise in helping our clients optimise their sites to rise to the top of the organic search engine rankings and to draw in buyers using cost-effective advertising and promotional strategies. We help clients to use social media and mobile marketing to build strong brands, loyal customers and healthy sales.

All of our services are multilingual and meet the highest ethical standards of practice.

Our core services include:

- Search Engine Optimisation
- Online Advertising
- Pay Per Click Advertising
- Social Marketing
- Mobile Marketing

# Just a few of our Clients

## What results are AccuraCast clients seeing?

We have a very wide range of clients who are using Facebook Ads.

Here are some of the headline results:

- **Cost per lead between 30% and 40% of Google Ads;**
- **Conversion volume 40% to 50% higher on Facebook compared to Google Ads;**
- **Lead quality matches that of Google Ads when the form has an intro and is set for higher intent.**

Ok, so now for the marketing tips...

**+48%**

Increase in volume of responses

**-69%**

Reduction in cost per response

*“AccuraCast set up Facebook advertising campaigns that have become an invaluable marketing channel for us, outperforming even Google Ads.”*

*- Chase Belgrave, financial consultancy  
for expats*



## Quality > Quantity Is Key!

Leads are the foundation needed to build a profitable business. And, particularly in the finance industry, you simply can't pitch your products if the raw leads don't match your criteria.

Facebook can be one of the most efficient and economical platforms to use for lead generation. But this can mean the quality of leads is not always as good as when generated through a more intent-focused channel, such as Google Search.

What Facebook offers, though, is excellent audience targeting and attractive ad formats. Only by knowing how to use these elements to your advantage - targeting, ad format, ad copy – will you generate the right sort of leads for your business.

*So... how do you ensure your Facebook campaign is delivering quality leads?*

## Which Leads Objective?













Each ad format on Facebook is designed to achieve a particular action. As you can see from the panel on the left, there are 11 major objectives.

For leads, you ideally want either the Lead Generation objective or the Conversions objective.

An experienced marketer can help to determine the best route to the customer and a series of controlled experiments will enable you to optimise your budget to achieve the best campaign efficiency.

This guide will provide the tools needed for the most revenue-generative ad results - generating a lead using known information from the user's Facebook profile.

Let's look at this in a bit more detail...

Awareness	Consideration	Conversion
 Brand Awareness	 Traffic	 Conversions
 Reach	 Engagement	 Catalogue Sales
	 App Installs	 Store Traffic
	 Video Views	
	 Lead Generation 	
	 Messages	

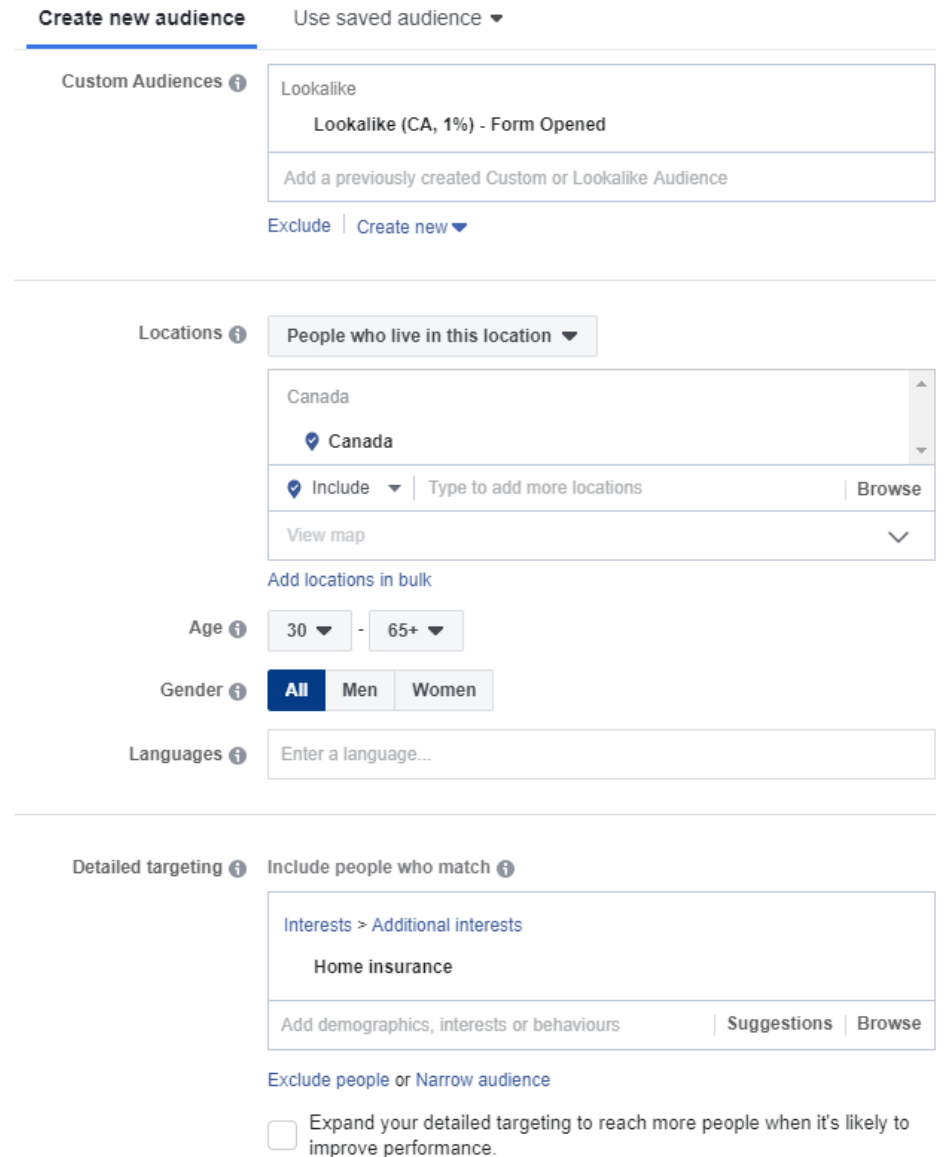
# Reaching Your Audience

Facebook audiences are like salt – a little can go a long way. But sometimes, going broad just isn't right, as the leads you get might not be the right sort of prospects.

A lot of people could be potential leads for a finance business. But only a specific demographic really matters.

To reach an ideal balance between good quality leads and a reasonable CPA you should test broad vs narrow audiences – i.e. compare results between these audiences with the same copy and lead format.

An example of a narrow audience might be to overlay custom audiences with detailed targeting, e.g. an insurance company might use a Lookalike of their previous lead form openers combined with detailed targeting of people interested in “home insurance”.



The screenshot shows the Facebook Ads targeting interface. At the top, there are two tabs: "Create new audience" (which is selected) and "Use saved audience". Below the tabs, there are three main sections:

- Custom Audiences:** A dropdown menu showing "Lookalike" as the selected option. Below it, a specific audience is listed: "Lookalike (CA, 1%) - Form Opened". There is a link to "Add a previously created Custom or Lookalike Audience" and buttons for "Exclude" and "Create new".
- Locations:** A dropdown menu showing "People who live in this location". A list of locations is displayed, with "Canada" selected. Below the list, there are options to "Include" (checked), "Type to add more locations", and a "Browse" button. There is also a "View map" option.
- Age:** A range selector showing "30" and "65+".
- Gender:** Three buttons: "All" (selected), "Men", and "Women".
- Languages:** A text input field with the placeholder "Enter a language...".

Below these sections, there is a "Detailed targeting" section with the following options:

- A toggle for "Include people who match".
- A list of interests, with "Home insurance" selected.
- Buttons for "Add demographics, interests or behaviours", "Suggestions", and "Browse".
- A link for "Exclude people or Narrow audience".
- A checkbox for "Expand your detailed targeting to reach more people when it's likely to improve performance." which is currently unchecked.





## Crafting Your Ad Copy

Your Facebook ad needs to do two things well: clearly explain your offer AND generate engagement.


With that in mind, here are some tips to make sure your ad copy resonates with the right audience:

- Make sure your offering is clear and concise: set out who it is that would benefit from this offer and don't over-promise.
- Use questions: this refines your target audience and can potentially generate a conversation.
- Avoid long chunks of text in the ad – save that for the form. Use short and snappy sentences.
- Give a compelling reason for the user to fill in the form, for example, "Sign up to receive a free investment consultation".






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## Choosing Your Ad Format

Facebook has built up a vast array of ad formats and placements over the years – the choice can be bewildering.

Which format is right for your brand? Do you need creative in landscape, square, and vertical formats?

Financial services regulatory requirements may not always allow the most captivating creative ideas... But our advice? Start with the basics and build from there.

- Choose a video or an image that features people – the demographic you want to target;
- Keep the video short and to the point, with important information at the start;
- Build for square and vertical formats so you can be seen on all mobile placements.





## Qualifying Leads with Chat Bots

The experience interacting with a Messenger bot can now be fully automated, taking much of the pain of lead qualification off your sales team.

If the user has an idea of what they want to buy, the bot acts like a personal assistant:

- Guiding the user through their purchasing decision;
- Ending with a carousel of the top product/service recommendations;
- Can be product-based, but could also help the user solve a problem or ask specific questions before getting in touch.

With the help of a designer and developer, finance marketers can enrich the conversation on Messenger with visual tools and characters that fit in with the brand style and personality.

## Increasing Lead Intent

Lead ads are an extremely effective way to generate leads, because the form filling and submission process is extremely easy. This can lead to prospects submitting forms without fully understanding what they're signing up for.

Whilst lead ads aren't new, Facebook has recently introduced Lead Forms with Canvas Ads to help improve conversion rates and lead quality.

The reason this works so well is that the interactive and informative experience of a Canvas Ad allows advertisers to provide a more comprehensive introduction to their offer, before the user has filled in the form.

Typically this results in higher quality leads as the immersive format better prepares the user for what to expect next.




**Content** | Settings


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**Form type** | ^

Customise your form depending on the goal of your Lead Generation campaign. The options you select may affect the volume of submissions and cost per lead. [Learn more](#)

Options

 **More volume**  
Use a form that's quick to fill in and submit on a mobile device.

 **Higher intent**  
Add a review step that gives people a chance to confirm their information.

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**Intro** (Optional) |  | v

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**Questions** | v

## Lead Form Tip 1: Customise for Higher Intent

Lead Ads eliminate one of the biggest barriers to conversion – form filling. But they do so at the expense of lead quality. Facebook makes it so easy, users often submit forms without realising it!

Adding a review step gives people a chance to confirm their information and gets rid of the rubbish or accidental leads.

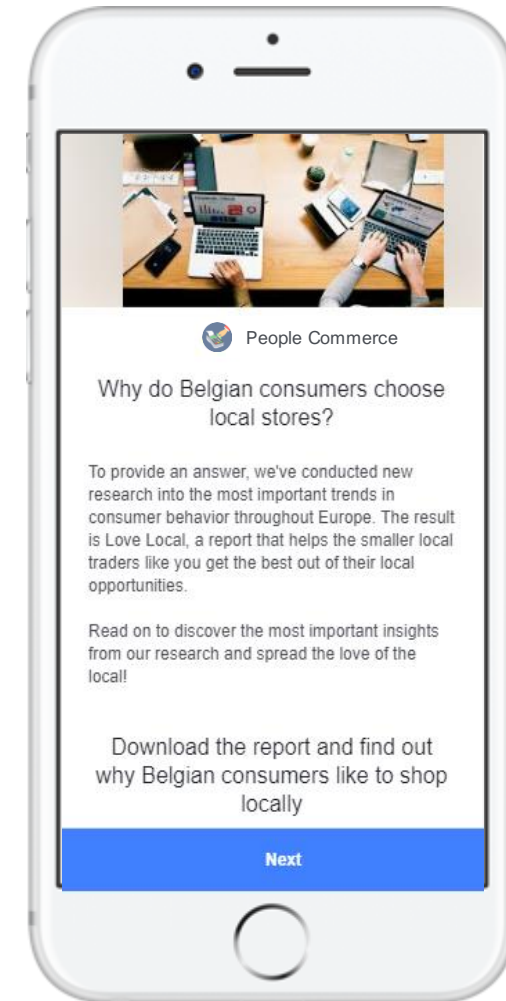
The feature adds an additional page and click to your form. It tells the user exactly what they are signing up for and what they can expect once they hit “Send”.

## Lead Form Tip 2: Include An Introduction

Intro sections are an optional feature on your form. Always use this space to tell users more about your offering and what they can expect by signing up.

Intro section should be short and to the point:

- i. Use bullet points – it's easier for users to scan and read.
- ii. Use a clear call-to-action (CTA) on the button to ensure users know exactly what they are signing up for.





## Lead Form Tip 3: Monitor Lead Quality

In order to determine whether Facebook Lead Ads are truly working well for your business, compare qualified leads against those from other channels.

- Determine a common set of criteria for lead qualification by the sales team
- Calculate the number of leads from each channel that qualifies

If the cost per qualified lead from Facebook is higher than that from other channels, you should use manual bidding and reduce your bid per result.

Also, have a regular process for feeding back lead quality from the sales team to the Facebook marketing team. Being synced up just keeps everyone happy!

## Checklist - Avoiding Bad Facebook Leads

- ✓ Focus on quality over quantity
- ✓ Split test on targeting but focus on audiences both broad and narrow
- ✓ Make your ad copy clear and to the point, with a specific and compelling call-to-action at the end
- ✓ Test new ad formats to help qualify your audience before they get in touch
- ✓ Use all elements of the lead form to get your message across
- ✓ Rigorously monitor ad quality and feedback results from sales teams to marketing

No company wants to waste money generating the wrong sorts of leads. Time to stamp it out!





## How can we help?

We have worked with hundreds of companies over many years and built unrivalled expertise in all aspects of online success.

We provide a bespoke service for each client that starts with clear analysis and ensues with creative communications implemented with scientific rigour.

We are very friendly and happy to discuss your issues and aspirations without obligation.

We look forward to hearing from you.

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