

The Meta Ads Checklist for 2026

1. Account foundation

- ☐ Set up Business Manager with the Ad Account, Page, and Pixel connected
- ☐ Add a payment method and set a daily or lifetime spend limit
- ☐ Verify your domain in Business Manager
- ☐ Secure admin access with 2-factor authentication and least-privilege roles

2. Tracking

- ☐ Install both the Meta Pixel and Conversions API (CAPI) for tracking redundancy
- ☐ Configure Aggregated Event Measurement with up to 8 prioritised events
- ☐ Confirm events are deduplicated between Pixel and CAPI
- ☐ Test that key conversion events fire correctly before spending
- ☐ Check your event match quality score and raise it with hashed email, phone, and click ID

3. Campaign structure

- ☐ Decide deliberately whether to run Advantage+ or a manual campaign, rather than accepting the default
- ☐ Match the campaign objective (Sales, Leads, Traffic, App) to your actual funnel goal
- ☐ Decide deliberately between Campaign Budget Optimisation (CBO) and ad set budgets
- ☐ Consolidate thin ad sets into fewer, better-funded ones so each can exit the learning phase
- ☐ Separate prospecting campaigns from retargeting campaigns
- ☐ Leave budgets stable for at least 3 to 4 days instead of editing daily

4. Audiences & targeting

- ☐ Build custom audiences from website visitors and CRM lists
- ☐ Build lookalike audiences from your best existing customers
- ☐ Test Advantage+ Audience against your manual interest targeting rather than assuming either wins
- ☐ Set exclusions for existing customers and recent converters
- ☐ Check for excessive audience overlap between ad sets

5. Creative

- ☐ Provide multiple ad formats and creatives per ad set for the algorithm to test
- ☐ Submit enough genuinely distinct creatives for retrieval to have real candidates to choose from
- ☐ Vary the hook, format, and angle, not just the colour or headline
- ☐ Supply 9:16 vertical assets for Reels and Stories placements
- ☐ Send every ad to a message-matched landing page
- ☐ Refresh creative before frequency climbs and performance fatigues

6. Measurement & optimisation

- ☐ Monitor frequency and CPM trends by campaign
- ☐ Compare Meta-reported conversions against GA4 or CRM-verified numbers
- ☐ Judge results on a fixed attribution window rather than switching between them
- ☐ Reallocate budget away from ad sets with rising cost per result
- ☐ Review creative performance weekly and retire fatigued ads on a schedule

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