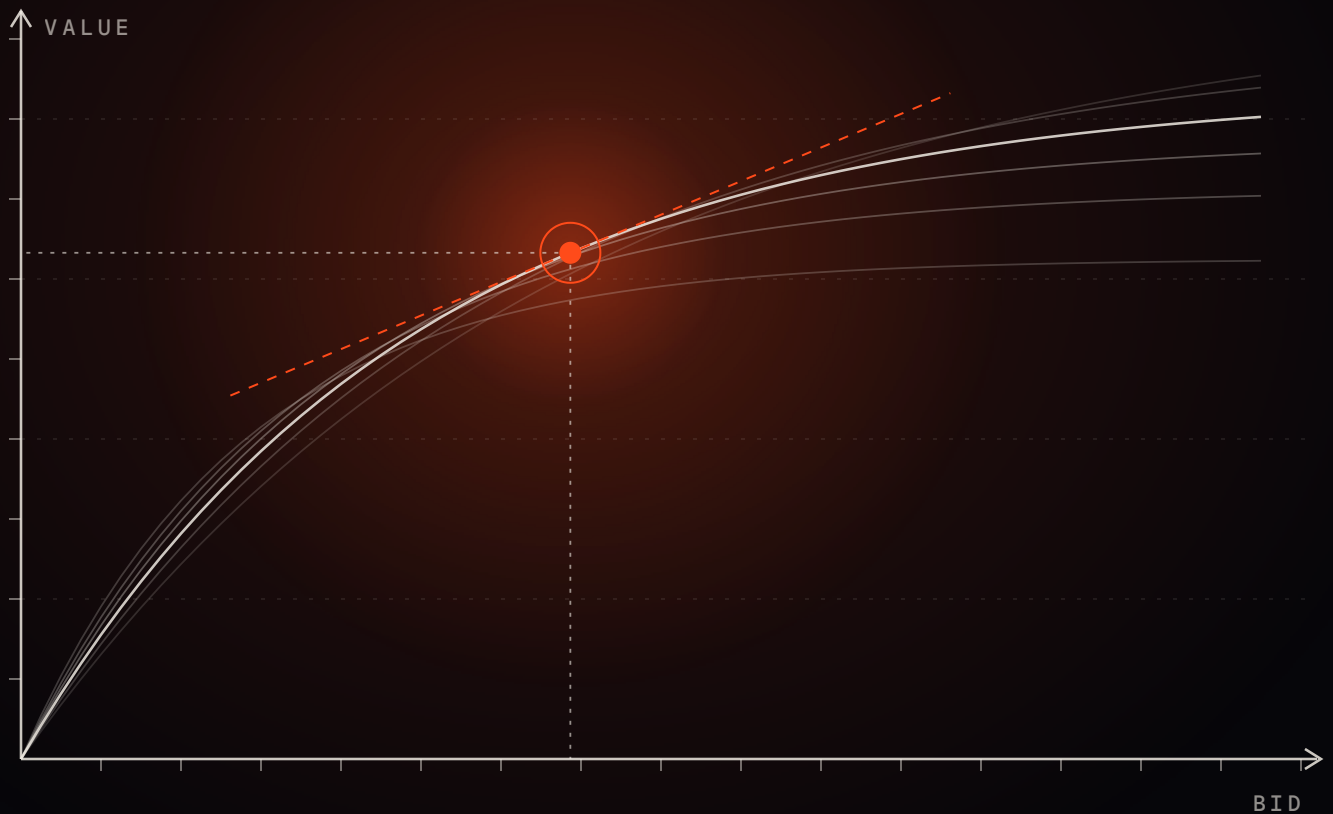




PPC Advertising *Mastery*

Work out what a click is worth to you, run Google Search, Local Services and Meta lead campaigns you control, prove which clicks became customers, and check it all in 30 minutes a week.

Digital Ingenuity

FIRST EDITION, OCTOBER 2026

BEFORE YOU BEGIN

Read this first

Paid ads are the fastest way to reach someone who wants what you sell today, and the fastest way to spend money with nothing to show for it. The difference is rarely the ad. It is the math before you start, the page and phone after the click, and a short weekly routine. Every rule here was checked against the platforms' own pages in late September 2026; they change often, so each rule links to its source.

-
- | | |
|-----------|--|
| <i>01</i> | Do the math first: write down your break-even cost per lead and per click, and budget from the customers you want. |
| <i>02</i> | Ads buy attention. Your phone, your form and your follow-up turn it into money. Fix those first. |
| <i>03</i> | Build Search campaigns around service, place and promise, with one page per promise. |
| <i>04</i> | Fence your money keywords with exact and phrase match and a three bucket negative list. Open the funnel only when your tracking tells the truth. |
| <i>05</i> | Automated campaigns (Performance Max, AI Max, Smart) need guardrails that you set on day one. |
| <i>06</i> | Local Services Ads charge per lead, not per click: verify, set honest hours and job types, answer every call, log every lead. |
| <i>07</i> | On Facebook and Instagram, the form and the callback matter more than the audience. |
| <i>08</i> | Close the loop: send booked and sold jobs back to Google and Meta inside their time limits, with consent handled. |
| <i>09</i> | Review for 30 minutes every week, audit once a month, and chase invalid clicks with evidence inside 60 days. ¹ |
-

Short on time? Take the scorecard at the back first. Your lowest scores tell you which chapter to open.

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Do the *math* before you spend

Before you spend a dollar, you can know the most you can pay for a click and still make money. Settle two things here: whether paid ads fit your business now, and the price ceiling you will put in writing.

1.1

Five gates before the first dollar

Run this test before you open an account. All five gates must be green.

METHOD

The Green Light Test

01

Demand. People already search for what you sell, where you sell it. If not, your first dollars belong in creating demand (Chapter 6).

02

Permission. You may advertise the service, within any verification or targeting limits your category carries (see the rule below).

03

Margin. The Break-Even Ladder below clears the price of a click in your market.

04

Response. A person answers calls and forms within minutes during every hour the ads run. Otherwise you pay for the click and a competitor gets the job.

05

Patience. You can fund a learning period: Google says a bid strategy typically needs one to two conversion cycles to calibrate after a change.² Money you need back this week is the wrong money for ads.

A red gate is a job, not a verdict. Fix it first, or spend the money somewhere it works today.

TABLE 1.1 5 ROWS

IF THIS IS TRUE TODAY	WHY ADS DO NOT FIT YET	DO THIS FIRST, OR INSTEAD
Nobody answers calls and forms in some of the hours ads would run	You pay for leads that reach voicemail	Cover those hours (Chapter 8), or run ads only when someone answers
You cannot tell which calls and forms came from ads	You cannot judge results, and automated bidding chases the wrong things	Set up the four tracking pieces in Chapter 8 before you launch
Your working ceiling sits below the price of a click	Every click loses money at today's rates	Raise your lead and close rates, or try Local Services Ads, which charge per lead (Chapter 5)
The crew is booked for weeks	Ads bring work you cannot take	Hold the budget until you have room, and use the time to build the page and tracking
You are new, with few or no reviews	Local Services Ads rank partly on rating and review count, ³ and visitors have little proof to go on	Ask every customer for a review, then start Search on your most urgent service

1.2

Check that you are allowed to advertise

Some categories need extra steps before an ad can run, or limit who you may target. Check yours first: verification can take longer than building the campaign.

§ RULE

Categories with extra steps on Google

Locksmiths and garage door repair. In the United States, Google Ads for these services require advanced verification before they can run.⁴

Housing, employment and consumer finance. In the United States and Canada, these ads cannot target by gender, age, parental status, marital status or ZIP code.⁵ In practice that reaches real estate, recruiting and lending ads.

CONTINUED

Health. Google treats health as a sensitive category, including invasive procedures such as cosmetic surgery and injections. Health advertisers can use Google's predefined audiences but not their own remarketing lists or customer lists.⁶

Licensed professions. Lawyers answer to their state bar, and doctors, dentists and real estate agents to their state board or commission, which may have their own rules on advertising claims, testimonials, “free” offers and past results. Check yours before you publish.

This guide describes platform rules and laws as general information, not legal advice. Open the linked source before you act on a rule, and ask your attorney about your own situation.

1.3

Climb the Break-Even Ladder

You need four numbers. Three come from your records: what a new customer is worth in first-year gross profit (not revenue), your close rate from lead to customer, and your lead rate from click to call or form, which Google Ads calls the conversion rate. The fourth is the market price of a click. The ladder turns them into the most you can pay for one click.

Gross profit is what a job brings in minus what it costs to do: labor, materials, parts and travel. Average it over the new customers of the last 12 months, and count the repeat work each bought in their first year. If customers stay for years, such as patients on recall visits or homeowners on a maintenance plan, you may use a longer period; write down which one you chose.

For line I, Keyword Planner in Google Ads estimates searches and the average cost for an ad to show on a keyword; it needs billing information before it shows keyword ideas.⁷ Treat it as a starting point: you often pay less than your maximum bid, because you only pay what it takes to clear Google's thresholds and beat the advertiser just below you,⁸ and Google says higher quality ads can often lead to lower costs per click.⁹

METHOD

The Break-Even Ladder

01

Start with profit. Write down the average first-year gross profit from a new customer (A).

02

Choose your share. Decide what share of it you will spend to win one customer (B). What you do not spend must still cover overhead and profit; the examples use a third and a quarter.

03

Price a customer. $A \times B$ is your allowable cost per customer (C).

04

Price a lead. $C \times \text{your close rate (D)}$ is your break-even cost per lead (E).

05

Price a click. $E \times \text{your lead rate (F)}$ is your break-even cost per click (G).

06

Set a working ceiling. $G \times 0.7$ is your working ceiling (H), leaving room for bad weeks and wrong guesses. Change the 0.7 if you like, but write it down.

EXAMPLE

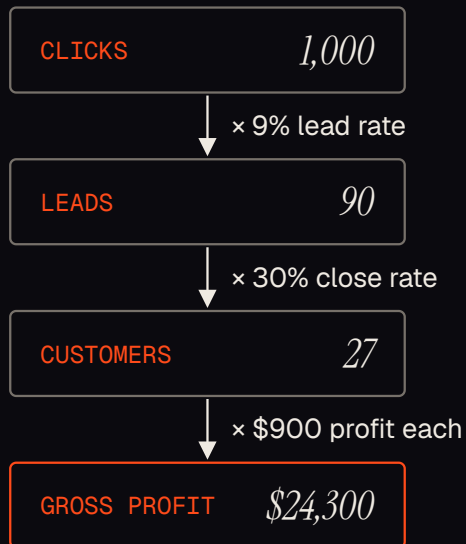
A three truck plumbing company in Frisco

Numbers invented for illustration. A new customer brings \$900 of first-year gross profit, and the owner will spend a third to win one: \$300. Three in ten leads become customers, so a lead is worth up to \$90. Nine in a hundred clicks become a call or form, so a click is worth up to \$8.10, with a working ceiling of \$5.67.

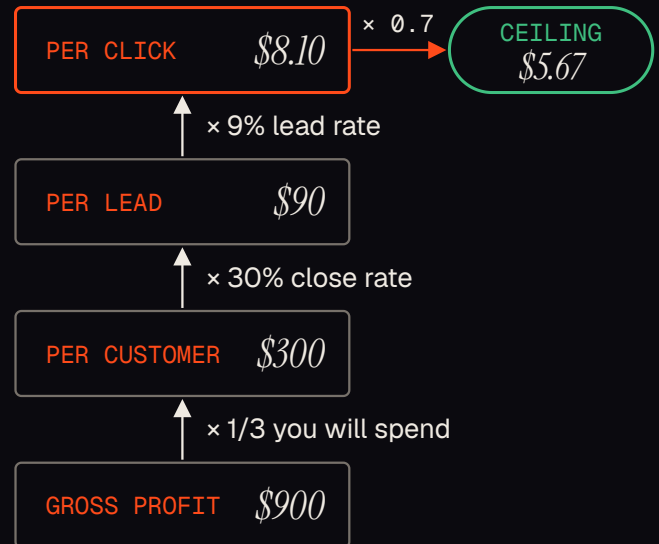
In the planner, drain cleaning and water heater searches sit below \$5.67: green. Emergency searches sit between \$5.67 and \$8.10: yellow, so they get their own ad group, tight negatives and an emergency page. One broad search sits above \$8.10: red, so it stays out.

EXAMPLE NUMBERS: A PLUMBING COMPANY

READ DOWN: WHAT CLICKS BECOME



CLIMB UP: WHAT A CLICK IS WORTH



Check: 1,000 clicks at \$8.10 cost \$8,100, which is exactly 27 customers × \$300.

FIG. 1.1

Customer value and two conversion rates set the most you can pay for a click: read down to see what clicks become, climb up to see what one click is worth.

Your Break-Even Ladder

Use a pencil: you will redo it after 30 days of real results.

LINE	WHAT IT IS	HOW TO GET IT	YOUR NUMBER
A	First-year gross profit per new customer	12 months of jobs: revenue minus labor, materials, parts and travel	
B	Share you will spend to win one	Your decision	
C	Allowable cost per customer	$A \times B$	
D	Close rate	Customers $\div$ leads, last quarter	
E	Break-even cost per lead	$C \times D$	
F	Lead rate (Google Ads: conversion rate)	Calls and forms $\div$ clicks	
G	Break-even cost per click	$E \times F$	
H	Working ceiling	$G \times 0.7$	
I	Planner estimate for your core searches	Keyword Planner	
J	Verdict	Green if I is below H, yellow if I is between H and G, red if I is above G	

EXAMPLE

A solo estate planning practice in Plano

Invented numbers again. A new client brings \$1,800 of gross profit and the attorney will spend a quarter to win one: \$450. One in five consultations becomes a client, so a lead is worth up to \$90. The site turns 5 in 100 clicks into an inquiry, so a click is worth up to \$4.50. The planner shows core searches well above that: red.

Red is not the end, because the rates multiply. A focused page that lifts the lead rate to 8 in 100, and faster intake that lifts the close rate to one in four, move the break-even click from \$4.50 to \$9.00. Fix the page (Chapter 7) and intake (Chapter 8, The first five minutes) first, then rerun the ladder.

1.4

Pay per click or pay per lead

Local Services Ads charge for each valid lead instead of each click.¹⁰

They are open to many categories beyond the trades, from lawyers and dentists to tutors and auto repair.¹¹ If your ladder is yellow or red and your category is eligible, start there (Chapter 5).

CHECKLIST

6 ITEMS

- ☐ Pull 12 months of jobs and work out gross profit per new customer.
- ☐ Count last quarter's leads and how many became customers.
- ☐ Look up estimated costs for your 10 core searches in Keyword Planner.
- ☐ Confirm your category has no extra verification step, or start it today.
- ☐ Write your break-even cost per lead and per click on one line and give it to whoever runs your ads.
- ☐ Enter the working ceiling in Google Ads as your bid limit (Chapter 9, rung 1).

CHAPTER 1 · IN SHORT

“*Ads do not fix a business that cannot answer the phone. They make it louder.*”

-
- 01 Fix any red gate in the Green Light Test before you spend.
-
- 02 Break-even cost per click = gross profit × share × close rate × lead rate.
-
- 03 Spend below a working ceiling, and raise it by improving your rates.
-

02

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Build the Search *account* right

A Search account is three layers of settings, and wasted money hides in the defaults. Here is the layout for a local or multi location business as Google Ads works today, and what to change before the first click.

2.1

Three layers, in plain words

The **account** holds billing, users, conversion goals and a shared library. Two account settings apply across your campaigns by themselves: account-level negative keywords, up to 1,000,¹² and account-level IP exclusions.¹³ Shared negative keyword lists do not. Each list works only in the campaigns you attach it to, so attach every list to every campaign, including each new one.¹² A **campaign** holds the budget, locations, networks, schedule and bid strategy. An **ad group** holds one tight theme: its keywords, its ads and the one page they send people to.

METHOD

The Service, Place, Promise Grid

01

List services. Write down the services that deserve their own budget: emergency repair and new installs, yes; two kinds of drain cleaning, no.

02

List places. Write down the markets that need their own budget, hours or message. Each gets a page with its own address, phone and photos, and every campaign gets the same negative lists attached.

03

Test each cell. Draw services down and places across, and ask of each cell: would I set a different budget, schedule or offer here? Yes makes a campaign; no merges it with its neighbor.

04

Split by intent. Inside each campaign, make ad groups for each kind of search: emergency, cost, near me, a specific problem.

05

One promise, one page. Give each ad group one promise in its ads and one landing page that keeps that promise.

EXAMPLE

The grid for a three truck plumbing company in Frisco

SERVICE	FRISCO	PLANO	MCKINNEY
Emergency repair	Own campaign: the 24 hour crew is based here	Own campaign: shorter hours, its own schedule	Merge with Plano: same hours and offer
Water heaters	One campaign for all areas: same install offer and budget everywhere	Merge	Merge
Drain cleaning	One campaign for all areas	Merge	Merge

Nine cells become four campaigns, plus one for the brand. The diagram below shows three of them, and the first one split by intent.

2.2

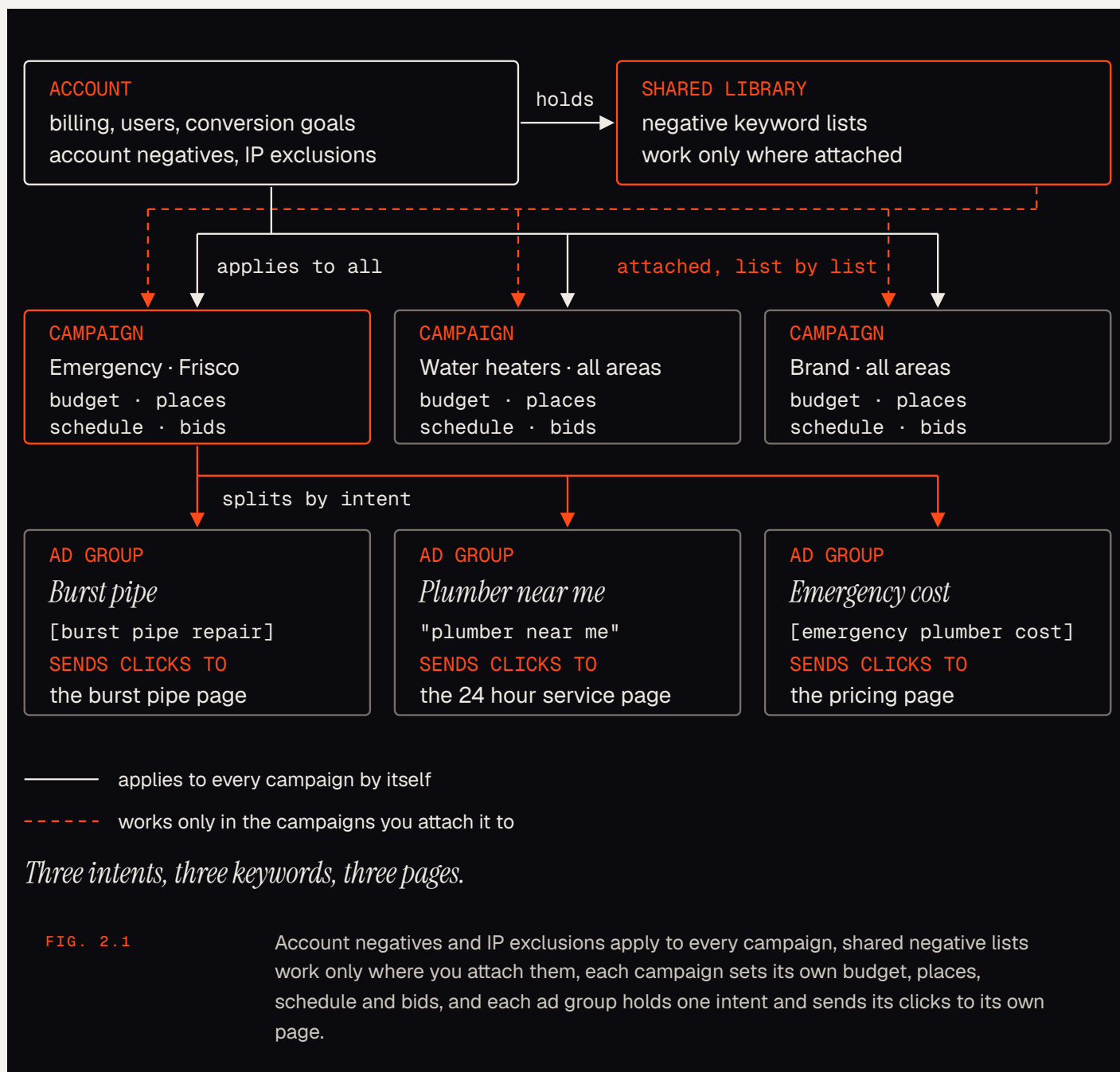
Change these defaults on day one

TABLE 2.1 3 ROWS

SETTING	THE DEFAULT	WHAT A LOCAL BUSINESS USUALLY WANTS
Location option	Presence or Interest: people in, regularly in, or showing interest in your locations, which Google calls the default and recommended option ¹⁴	Our advice for a service area business: test Presence, people in or regularly in your locations, which Google says to consider when you only want people in specific places, and compare cost per lead ¹⁴
Search partners	Included in new Search campaigns. Search partners are other sites that show Google search ads ¹⁵	Compare their cost per lead, and opt out in campaign settings if they do not pay ¹⁵
AI Max	On for new Search campaigns ¹⁶	Each feature reviewed and set by you (see below)

Draw the service area in the campaign's locations: a radius around an address, or a list of cities or ZIP codes, and exclude places you do not serve.¹⁷ Google calls its location targeting a best effort from many

signals, not 100% accurate,¹⁷ so the Not here negative list in Chapter 3 still earns its place.



Two more choices: an ad schedule that matches the hours someone answers the phone, and a separate brand campaign for searches of your business name, so cheap brand clicks never flatter your service campaigns.

2.3

AI Max: decide each switch yourself

AI Max is a set of features inside a normal Search campaign, on by default for new ones. Search term matching reaches searches beyond your keywords, text customization writes ad text from your site and ads, and Final URL expansion sends people to another page on your site that Google judges more relevant to the search. You keep brand and URL inclusions and exclusions and can switch each feature off, with one link: Final URL expansion needs text customization, so switching text customization off also switches Final URL expansion off.¹⁶ Your negative keywords still apply.¹⁸

Two details trip people up. Search term matching does not work with manual CPC (cost per click) bidding, where you set the most you will pay for a click, and when text customization and Final URL expansion are both on, pinned headlines are not respected.¹⁸ Until your conversions are real (Chapter 8), keep search term matching and Final URL expansion off.

! WARNING

The broad match setting is turning into AI Max

Starting in September 2026, Google is automatically upgrading campaigns that use the campaign-level broad match setting to AI Max.¹⁹ Open each campaign's settings this week and see which features are on.

2.4

Ads that earn the click

A responsive search ad takes up to 15 headlines of 30 characters and 4 descriptions of 90 characters.²⁰ Google tests combinations to find what works for each search.²¹ It does not recommend pinning for most advertisers; if you must, pin two or three options to the same position.²⁰ Write headlines in five groups so any mix reads well: service and place, offer, proof, speed, and trust (license, insurance, warranty).

Then add assets, the extra lines and buttons that can show with your ad. Adding them costs nothing, and a click on one costs the same as a click on the ad.²² ²³ Four matter most to a local business. A call asset puts a call button on the ad and can show only in the hours someone answers.²² A location asset, linked to your Business Profile, can show your address, distance and a call button.²⁴ Sitelinks send people to your main service pages, with 25 characters of link text each,²⁵ and callouts add short facts such as “Licensed and insured” or “Same-day service”, also 25 characters.²³ Put your number in a call asset, not in the ad text, where it can get the ad disapproved.²²

§ RULE
Call-only ads are retiring

Google removed the option to create new call-only ads in February 2026, and all existing call-only ads stop receiving impressions in February 2027. The replacement is a responsive search ad with a call asset.²¹ If you still run call-only ads, rebuild them now, while you can compare old and new side by side.

2.5

Build your first keyword list

☐ CHECKLIST

6 ITEMS

- ☐ List every service you want more of, in the words customers use, not trade terms.

- ☐ Read a week of forms and listen to a week of calls, and write down the phrases people used.

- ☐ Add the job types your Local Services leads ask for, if you run them.

CONTINUED

- ☐ Run Keyword Planner for more ideas and cost estimates, and keep only searches you would pay for at your working ceiling.⁷

- ☐ Group them one intent per ad group: emergency, cost, near me, a named problem.

- ☐ Enter each as exact [] or phrase " " match; Chapter 3 explains why, and what happens if you type neither.

EXAMPLE

A two location dental practice in Allen and McKinney

Three campaigns. Emergency dental covers both offices on one budget, because a patient in pain goes to whichever office can see them first; its schedule matches front desk hours. Implants gets a campaign per office, because each has its own consult calendar and page. Brand covers the practice name.

Google's health policy for personalized ads covers invasive procedures such as surgery, so the practice treats implant ads as covered: no remarketing or patient lists, only Google's predefined audiences.⁶ Search intent does the work instead: exact and phrase keywords such as “dental implants allen”, a page per office and a consult offer.

CHECKLIST

7 ITEMS

- ☐ Location option chosen, and Presence tested against Presence or Interest on cost per lead.

- ☐ Service area drawn by radius, cities or ZIP codes, with the places you do not serve excluded.

- ☐ Search partners kept only if their cost per lead pays.

- ☐ Each AI Max feature reviewed and set.

- ☐ No call-only ads left; call, location, sitelink and callout assets added.

- ☐ Every ad group has one landing page and as many distinct headlines as you can write well, up to the 15 Google allows.²⁰

- ☐ Brand searches in their own campaign, and an ad schedule that matches answered hours.

Account Build Sheet

One row per campaign. If two rows share the same budget, schedule and offer, merge them.

SERVICE	PLACE	DAILY BUDGET	AD GROUP THEMES	LANDING PAGE AND ITS ONE PROMISE

NOTES

CHAPTER 2 · IN SHORT

“*Split campaigns when money or place differs. Split ad groups when intent differs.*”

-
- 01 Campaigns hold money and place; ad groups hold intent and one page each.
-
- 02 Review the defaults: location option, search partners and each AI Max feature.¹⁶
-
- 03 Replace call-only ads with call assets before February 2027.²¹
-

03

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Match types and *negatives*

Match types decide which searches can trigger your ad. Negative keywords decide which ones cannot. Between them they decide what you pay for, so both get a weekly routine.

3.1

What each match type reaches today

TABLE 3.1 3 ROWS

MATCH TYPE	HOW YOU WRITE IT	WHAT IT CAN MATCH	USE IT WHEN
Exact	[water heater repair]	Searches with the same meaning or intent	Always, for your money searches
Phrase	"water heater repair"	Searches that include the meaning of your keyword	Always, for your money searches
Broad	water heater repair	Searches related to your keyword	Conversions are real and you bid with Smart Bidding

Broad is the default: a keyword typed without brackets or quotes runs as broad match.²⁶ Check every keyword you enter. Broader types reach every search a narrower type would, plus more, and Google says it is critical to use Smart Bidding, its automated bidding that aims for conversions or conversion value, with broad match.²⁶ Without truthful conversion data, broad match finds searches you never meant to buy.

3.2

How negative keywords really work

A negative keyword stops your ad showing on searches that contain it. Four facts from Google decide how you write them.²⁷

5,000

negative keywords one shared list can hold, with up to 20 lists per account

SOURCE 12

TABLE 3.2 4 ROWS

WHAT GOOGLE SAYS	WHAT YOU DO
Negatives do not match close variants or other expansions	Add singular, plural and synonyms yourself: job, jobs, career, careers, hiring
Negatives do account for casing and misspellings	Skip the typos
Negative broad, phrase and exact block in different ways	Broad blocks all the words in any order, phrase blocks the words in that order, exact blocks that search only
An ad can still show if the negative word comes after the 16th word of a long search	Expect a few odd long searches and block them as they appear

Account-level negatives are capped at 1,000.¹² Shared lists scale further, and one edit fixes every campaign they are attached to, and only those.¹²

3.3

The search terms report is your source of truth

Keywords are what you bid on; search terms are what people typed. The report lists the searches that triggered your ads, but leaves out terms with too little activity, for privacy.²⁸ You will never see everything, so write your negative list before launch, not only from the report.

METHOD

Fence and Funnel

01

Fence the money searches. Start with exact and phrase keywords for the services you sell, and load a starter negative list before launch. Attach every list to every campaign, including each new one.

02

Keep the funnel closed. Leave broad match and AI Max search term matching off while your conversions are unproven.

03

CONTINUED

Read the report every Monday. Every search term that spent money gets one decision: promote, block or leave.

04

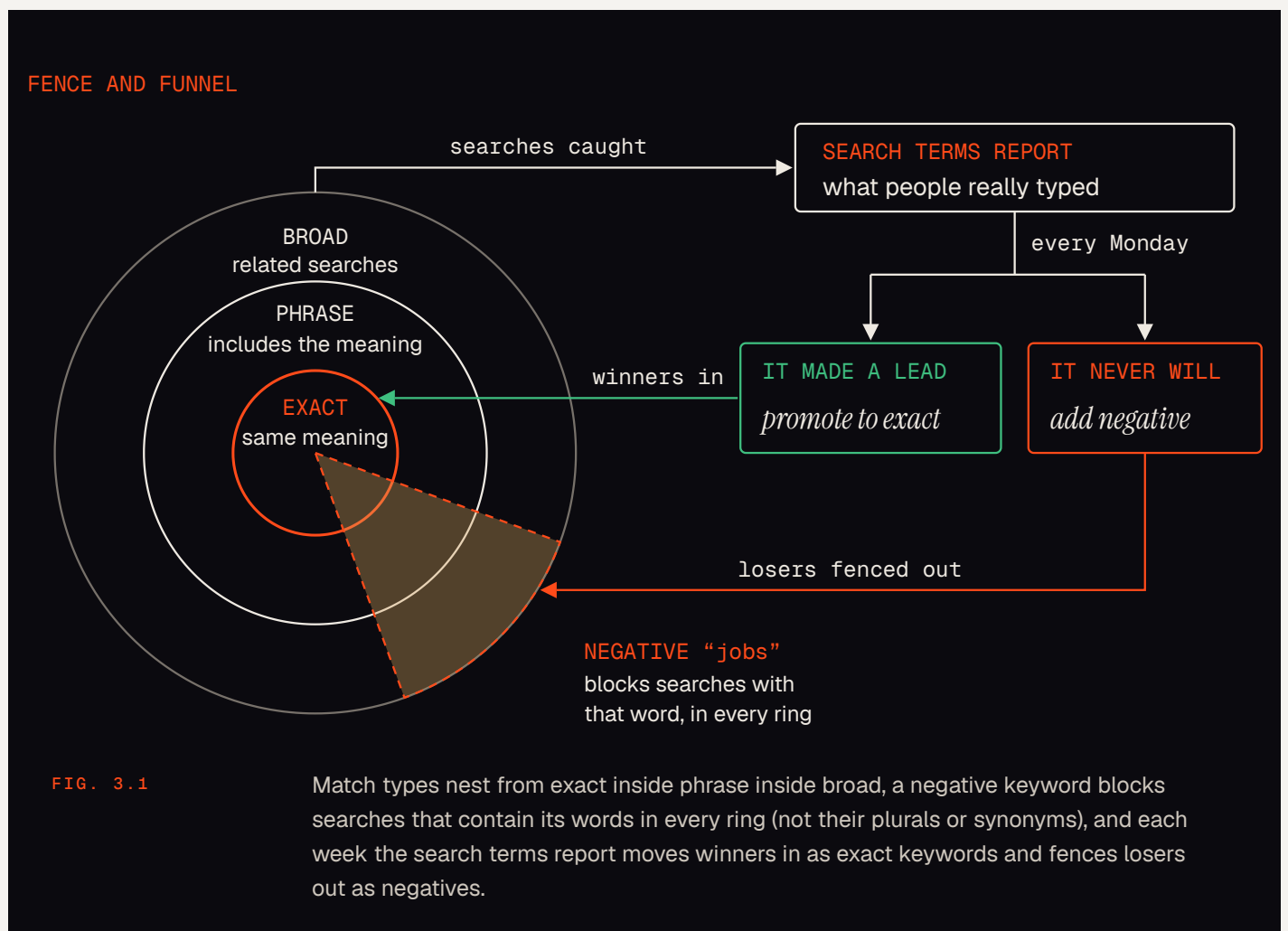
Promote winners. A search that produced a qualified lead becomes its own exact keyword.

05

Block losers. A search that will never buy becomes a negative, with its plural and synonyms.

06

Open the funnel last. Add broad match or AI Max search term matching only when qualified conversions are real and you bid with conversion-based Smart Bidding, and keep reading the report weekly.^{16, 26}



3.4

The Three Bucket Negative List

Write your starter list in three buckets, save each bucket as a shared list, and attach each list to every campaign.

TABLE 3.3 3 ROWS

BUCKET	WHAT IT BLOCKS	STARTER TERMS
Never	Searches from people who will never hire you	jobs, careers, salary, hiring, DIY, how to, training, course, school, used, parts, manual
Not us	Services and brands you do not handle	The jobs you turn down, the brands you do not service, commercial if you are residential only
Not here	Places you do not serve	Cities, counties and neighborhoods outside your service area

! WARNING

Delete any term you sell

The starter terms are common wastes, not rules. A private school sells school and course, a used car lot sells used, and an auto shop may sell parts. Delete every starter term that describes what you sell. The same goes for “free”: a roofer who offers free inspections wants the search “free roof inspection”, so block specific searches such as “free roof repair program” as exact negatives instead of the word.

Pick the match type of each negative by what it should block. A single word that never buys, such as jobs, goes in as negative broad, which blocks any search containing it. A phrase such as “how to” goes in as negative phrase, which blocks those words in that order. One wasted search, word for word, goes in as negative exact.²⁷

Starter Negative List

Aim for ten lines per bucket before launch, with plurals and synonyms on their own lines.

BUCKET	TERM	MATCH TYPE	APPLIES TO	REASON

NOTES

EXAMPLE

A garage door company reads one week of search terms

The company passed Google's advanced verification before its first ad could run.⁴ Six of the twenty lines it read one Monday, with invented results:

SEARCH TERM	THIS WEEK	DECISION	WHY
garage door spring repair plano	3 calls	Promote to exact	Proven buyer search
emergency garage door repair near me	2 calls	Promote to exact	Proven, and urgent
garage door repair jobs	4 clicks, no leads	Negative: jobs, job	Never bucket
how to fix garage door spring	6 clicks, no leads	Negative: how to	Never bucket
commercial overhead door repair	2 clicks, no leads	Negative: commercial	Not us: residential only
garage door repair denton	3 clicks, no leads	Negative: denton	Not here: outside the area

Two lines with one click each and no pattern yet were left alone, noted to check next Monday.

CHECKLIST

5 ITEMS

- ☐ Start with exact and phrase keywords on your core services.
- ☐ Load a starter negative list from all three buckets before launch.
- ☐ Add the singular, plural and synonyms of every negative.
- ☐ Attach every list to every campaign, including each new one.
- ☐ Keep account-level negatives under 1,000 and put the rest in shared lists.

CHAPTER 3 · IN SHORT

-
- 01 Exact and phrase fence your money searches; broad match waits for real conversions.
-
- 02 Negatives ignore close variants, so write plurals and synonyms yourself.²⁷
-
- 03 Every Monday, promote winners to exact and block losers in three buckets.
-

NEXT · CHAPTER 4

*Automated campaigns: know what you **control***

32

04

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Automated campaigns: know what you *control*

Performance Max, AI Max and Smart campaigns make many decisions for you. They can work for a local lead business once you know which levers you still hold. Sort every lever into three piles, and set the guardrails before launch.

4.1

Performance Max in one paragraph

Performance Max is a goal-based campaign type that reaches all Google Ads inventory from one campaign: YouTube, Display, Search, Discover, Gmail and Maps.²⁹ You give it a budget, a goal, your text, images and videos, and hints about your customers. It decides where to show, to whom, and with which mix of your material.

4.2

No longer a black box

Older advice says you cannot steer Performance Max. That is out of date.

10,000

campaign-level negative keywords now allowed in Performance Max, up from 100

SOURCE 30

Google has also added negative keyword lists, device and age controls, search terms reporting for all Performance Max campaigns, and up to 50 search themes per asset group.³¹ Brand exclusions and placement exclusions are available, and Final URL expansion can be switched off.^{29, 32}

Know the limits, though. Negative keywords in Performance Max apply to Search and Shopping inventory only, not to YouTube, Display, Gmail or Discover.³³ Audience signals are suggestions: Performance Max may show ads to people outside them when it predicts they will convert.³⁴ Final URL expansion is on by default.³² And IP exclusions reach Performance Max only through the account-level list.¹³

METHOD

Set, Suggest, Surrender

- 01 **List the levers.** Budget, goal, locations, searches, negatives, landing pages, ad text, channels, brand traffic and audiences.
- 02 **Sort each one.** Set is a hard limit you control, Suggest is a hint the system may go past, and Surrender means Google decides. Use the matrix below.
- 03 **Question every surrender.** For each lever under Surrender, ask: can I afford to lose control of this?
- 04 **Move what you cannot afford to lose.** Switch off Final URL expansion, attach your negative lists, add brand exclusions, and count only qualified leads.
- 05 **Launch, then look.** After two weeks, read the search terms and where the money went, and move any surprise back under Set.

4.3

Smart campaigns

Smart campaigns are the simplest type. You choose keyword themes instead of individual keywords, and the ads can show across Google Search, Google Maps, YouTube, partner websites and the Display Network. You can create them only in Smart Mode, Google Ads' simplified account view.³⁵ They suit an owner with little time and a small budget who wants to start. Move to a standard Search campaign when you want to choose exact searches, write negatives line by line and send each ad group to its own page.

WHO HOLDS EACH LEVER

	STANDARD SEARCH	SEARCH + AI MAX	PERFORMANCE MAX
Budget and goal	SET	SET	SET
Locations	SET	SET	SET
Which searches match	SET keywords + match types	HINT keywords seed it	HINT search themes
Negative keywords	SET	SET still respected	SET Search, Shopping only
Landing page	SET	SET if URL expansion off	SET if URL expansion off
Ad text	SET you write, Google mixes	SET if customization off	GOOGLE mixes your assets
Channels	SET Search, partners if on	SET Search, partners if on	GOOGLE six Google channels
Your own brand name	SET brand campaign	SET brand exclusions	SET brand exclusions
SET a hard limit you control HINT a suggestion it may go past GOOGLE decided for you			

FIG. 4.1 Who holds each lever in each campaign type: in Performance Max the searches, the ad text mix and the channels move out of your hands unless you set the controls that remain.

4.4

Which type, when

TABLE 4.1 6 ROWS

TYPE	WHERE IT SHOWS	USE IT WHEN	NOT YET IF
Search	Google Search, and search partners if on ¹⁵	It is your first campaign: you choose the searches, the ads and the page	Nobody can answer the phone in ad hours
Local Services Ads	Google Search, for eligible categories, paid per lead ¹⁰	Clicks are expensive and your category qualifies (Chapter 5)	Verification is not finished
Performance Max	YouTube, Display, Search, Discover, Gmail and Maps ²⁹	Search is profitable and you want more reach at the same cost per lead	Qualified conversions are few each month, or you do not trust your tracking
Demand Gen	YouTube, including Shorts, Discover, Gmail, Maps and the Display Network; Display campaigns are moving into it ³⁶	You want to show finished work to people before they search	Search does not pay for itself yet
Video	YouTube and Google video partner sites ³⁷	You want people in your area to know your name	You need leads this month
Smart	Search, Maps, YouTube, partner sites and Display, from keyword themes ³⁵	You have little time and want to start	You want to pick exact searches and pages

The “not yet” column is the test for Performance Max in particular. It learns from your conversions, so it needs a steady flow of qualified ones and tracking you would bet money on. Until then, put the budget into Search.

4.5

The lead generation trap

Automated bidding chases whatever you call a conversion, the action you count as a result: as many as possible, or as much value as possible, within your budget.³⁸ If a page view, a spam form or a ten second call

counts, the system will find you more of them, cheaply. Before you launch anything automated, make sure only a qualified lead or a booked job counts as a primary conversion (Chapter 8).

☐ CHECKLIST

6 ITEMS

- ☐ The conversion goal is a qualified lead or booked job, not every form view.

- ☐ Brand exclusions are on if you run a separate brand campaign.

- ☐ Your negative keyword lists are attached.

- ☐ Final URL expansion is off, or URL exclusions fence off pages that should never get ad traffic.

- ☐ Account-level placement and IP exclusions are reviewed.

- ☐ Search terms and results are read after the first two weeks.

EXAMPLE

A four location auto repair group adds Performance Max

The group already runs Search campaigns for brakes, diagnostics and its brand. Before launching Performance Max beside them, it attaches its shared negative lists, excludes its own brand so it does not pay twice for customers who already know it, and turns off Final URL expansion so every click lands on a service page, never on the careers page.

It counts only booked appointments as conversions. After two weeks it reads the search terms, blocks a batch of parts and DIY searches, and leaves the campaign alone for the rest of the month.

Set, Suggest, Surrender

Fill one sheet per automated campaign before launch. Any “no” in the last column is a control to switch on first.

LEVER	SET	SUGGEST	SURRENDER	OK TO SURRENDER?
Conversion goal				
Searches matched				
Negative keywords				
Landing pages				
Ad text				
Channels				
Audiences				
Brand traffic				

NOTES

CHAPTER 4 · IN SHORT

“Automation finds more of whatever you count. Count only what you want more of.”

-
- 01 Sort every lever into Set, Suggest or Surrender before launch.
-
- 02 Performance Max now takes negatives and shows search terms, but negatives cover Search and Shopping only, and audience signals are hints.^{33, 34}
-
- 03 Feed automation only qualified conversions.
-

05

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Local Services Ads: pay per *lead*

Local Services Ads (LSA) charge for leads, not clicks, which can make them a safer first step when clicks in your market are expensive. Find out whether they fit your business, and how to run them so more of what you pay for turns into work.

5.1

How they differ from Search

You are charged for each valid lead: a message or email, a voicemail or callback request, an answered call with a conversation, a missed call you return, or a booking request in the United States and Canada. Message leads are usually priced lower than phone leads.¹⁰

They are not only for trades. Google lists eligible categories in home services; business services such as lawyers, accountants and real estate agents; health, such as dentists and optometrists; learning, such as preschools and tutors; care; wellness; beauty; and automotive, such as repair and body shops.¹¹ Check your exact category and ZIP codes on Google's sign-up page before you plan around them.

TABLE 5.1 4 ROWS

COMPARE	LOCAL SERVICES ADS	SEARCH ADS
You pay for	A valid lead ¹⁰	A click ⁸
You control	Job types, service area, hours, budget and bid mode ^{10, 39, 40}	Keywords, negatives, ads, pages, schedule, bids
Speed to start	After verification, which takes paperwork ⁴¹	As soon as your ads pass review
Best for	Verified businesses in eligible categories with a phone that is always answered	Choosing the searches, the page and the offer yourself

If you qualify, run both: Local Services Ads for steady calls, Search for the services and places you want to push.

5.2

The badge and the guarantee, today

§ RULE

One Google Verified badge, no money back guarantee

Local Services Ads now use a single Google Verified badge for all advertisers. Google discontinued the Money Back Guarantee that came with the old Google Guarantee badge; it covered only services booked through Local Services Ads before December 7, 2025, with claims due within 30 days of the job's completion.⁴² Take any mention of a Google guarantee out of your ads, your website and your sales scripts.

5.3

Getting verified

Screening varies by category and location and can include background, business registration, insurance and license checks. With accelerated verification you get the badge quickly, then have 14 days to finish the remaining steps to keep your ad serving.⁴¹ Gather licenses, insurance certificates and the names of everyone who needs a check before you apply.

5.4

What decides where you show

Google ranks Local Services Ads on your bid, your responsiveness, your profile quality and your relevance to the search. Missed calls can hurt responsiveness, and profile quality includes your rating, review count, response time, images and verification checks.³ In plain terms: answer the phone, reply fast, collect reviews and fill every field.

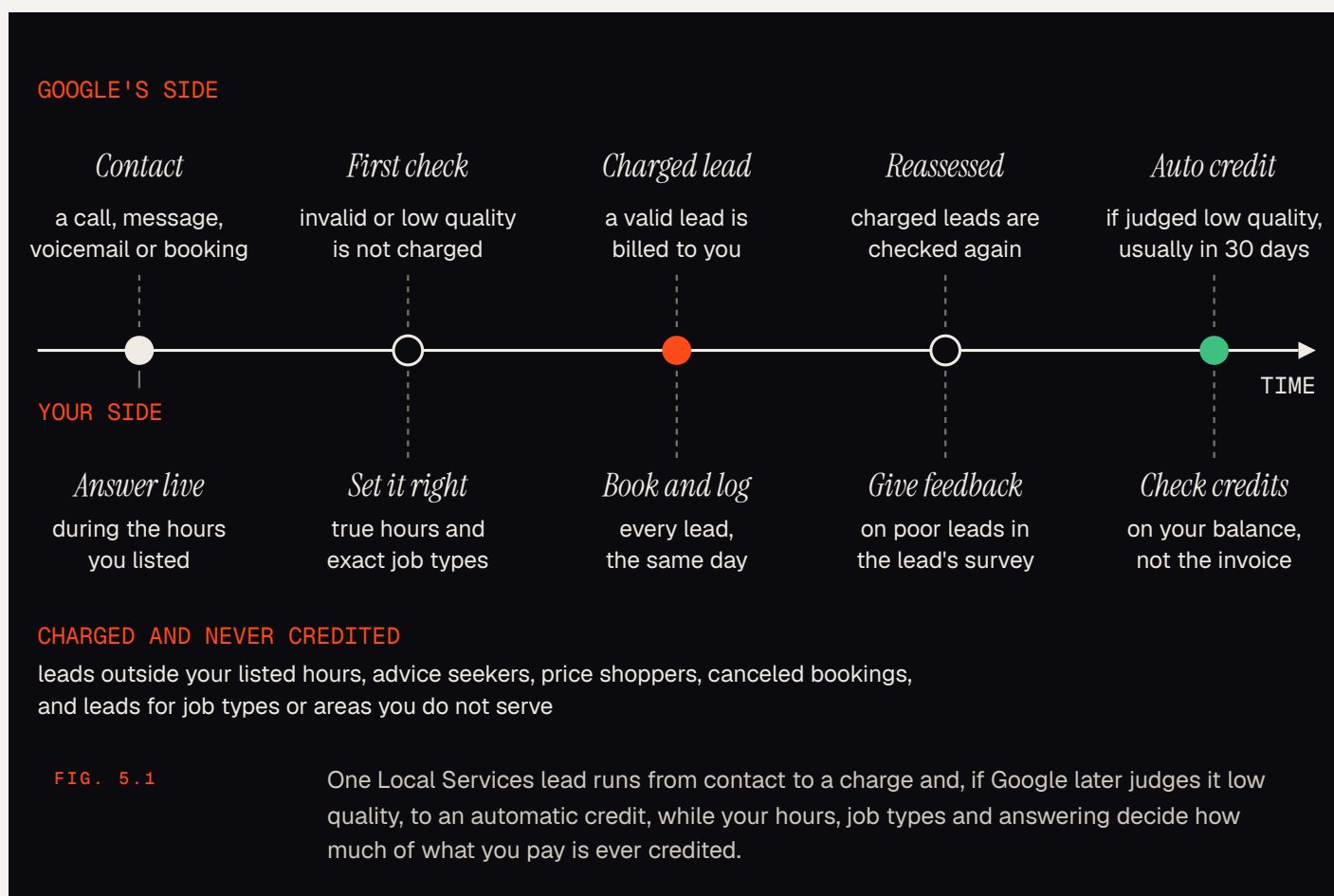
5.5

Bidding

There are three bid modes: Maximize leads, Target cost per lead and Max per lead. Google recommends Maximize leads, suggests a weekly budget of at least 10 leads for it, and says accurate results take about 2 weeks.³⁹ Size the weekly budget to the jobs you can take, and do not judge a change for two weeks.

5.6

What you still pay for



Some valid leads are never credited. Google's examples include contact outside your business hours, a customer who only wanted advice, a canceled booking, price research, a customer who did not answer your

follow-up, and a specific job you do not do inside a general service type you listed.¹⁰ Credits are now automatic: Google checks each lead at first contact, does not charge those it judges invalid or low quality, and may credit charged leads later. It no longer credits “job type not serviced” or “geo not serviced” leads, gives no lead credits to health care verticals, tax specialists or advertisers in Europe, the Middle East and Africa, and applies most credits within 30 days, while the original charge stays on your invoice.⁴⁰ A dentist, optometrist or other health provider should not expect automatic credits at all.

So list only the hours someone answers and only the jobs you want. For a poor lead, tell Google through the lead's feedback survey:¹⁰ open Leads from the menu, then Rate this lead.⁴⁰

METHOD

The LSA Loop: Verify, Fill, Answer, Rate

01

Verify. Start verification early, gather every document, and finish the remaining steps inside the 14 day window if you use accelerated verification.⁴¹

02

Fill. Complete the profile: services, job types, service area, hours, photos and bio. List only the jobs and places you want.

03

Answer. Answer every call live during your listed hours, and return any missed call within the hour.

04

Rate. Log every lead the same day: in area or not, booked or not. Send feedback on poor leads, and check each month which ones were credited.

CHECKLIST

6 ITEMS

- ☐ Job types and service area match exactly what you do.

- ☐ Business hours match the hours someone answers.

- ☐ Every call answered, or returned within the hour.

CONTINUED

- ☐ Every lead logged the same day, with feedback sent on poor ones.
- ☐ Photos, bio and reviews kept current.
- ☐ Weekly budget sized to the jobs you can take, and at least 10 leads a week if you use Maximize leads.

EXAMPLE

A roofing contractor in Collin County

The contractor's profile listed 24 hour availability, but after 6 p.m. calls went to a voicemail box nobody checked until morning. Those evening leads were valid and charged, and few were ever booked. The profile also listed gutter installation, which the contractor hands to a partner, so those leads were charged too.

The fix took one afternoon. Hours now match when the office answers. Gutter installation is gone from the job types. The bid mode moved to Maximize leads, the weekly budget matches the crews' capacity, and the owner waits two weeks before judging the change.³⁹

WORKSHEET

LSA Lead Log

One line per lead, filled in the same day. At month end, compare the last column with your credits.

DATE AND LEAD TYPE	JOB TYPE	IN AREA?	BOOKED?	FEEDBACK SENT, CREDITED?

NOTES

CHAPTER 5 · IN SHORT

“*In Local Services Ads, your hours and job types are money settings.*”

-
- 01 You pay per valid lead; credits are automatic, and the money back guarantee is gone.^{40, 42}
-
- 02 Answer every call: missed calls can hurt your ranking.³
-
- 03 List only true hours and wanted job types, because mismatches are charged, not credited.
-

06

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Meta ads for *local* leads

Facebook and Instagram reach people before they search. That makes Meta good at creating demand and risky for lead quality, because a form is easy to fill in with one thumb. Set up a lead campaign that brings real people, and learn the rules that trip up regulated advertisers.

6.1

What Meta is for

Search catches people who already want you. Meta shows your work to people who were not looking yet, like a homeowner scrolling past a new roof two streets away. The lead is colder, so quality comes from two places you control: the form, and how fast a person calls back.

6.2

Campaign setup today

An Advantage+ leads campaign turns on Advantage+ budget, audience and placements by default, each adjustable, and supports instant forms, website forms, calls and messaging; Meta notes it may not be in every account yet.⁴³ Audience controls such as locations, minimum age, excluded custom audiences and languages are hard limits; audience suggestions only guide delivery.⁴⁴ Put your service area in the controls, and leave “Reach more people likely to respond to your ads” unchecked, or Meta may deliver beyond it.⁴⁴

Detailed targeting exclusions are gone: Meta removed them from Ads Manager starting March 31, 2025 and from boosted posts starting June 10, 2025. Custom audience exclusions remain.⁴⁵ To keep current customers out, exclude a custom audience of them, except in a Special Ad Category, where exclusion targeting is limited.⁴⁶ Medical and dental practices should read Chapter 8's privacy section before uploading any patient list.

§ RULE

Special Ad Categories and personal attributes

Housing, employment and financial products and services ads must run under a Special Ad Category. Since January 21, 2025, US advertisers must use the Financial products and services category for financial ads; it replaced the old Credit category. These categories limit or remove targeting by age, gender and ZIP code, along with exclusion targeting and lookalike audiences, and city or pin locations use an expanded radius.⁴⁶ They also cannot use Advantage+ audience.⁴⁴

CONTINUED

Separately, Meta ads must not assert or imply personal attributes, including physical or mental health conditions and vulnerable financial status.⁴⁷ “Tired of your back pain?” speaks to the reader's condition; “Back pain care, same week visits” describes your service. Write the second kind.

6.3

Instant forms: type and questions

Instant forms open inside Facebook or Instagram. There are three types: More volume, the default; Higher intent, which adds a review screen where people confirm their details and delivers only in mobile Facebook and Instagram feeds; and Rich creative.⁴⁸ Start with Higher intent. The extra tap costs some volume and saves your team from chasing accidental taps.

! WARNING

Questions you may not ask

Instant forms may not ask for health information, insurance information, financial information, government ID numbers or criminal history, among others, and forms that do will not run.⁴⁹ A dental office that asks “Do you have dental insurance?” on the form is likely to be flagged, because insurance information is on the list. The safest place to ask is the callback.

Leads expire: instant form leads can be downloaded for up to 90 days after submission.⁵⁰ Connect the form to your CRM, the system where you keep lead and customer records, so leads arrive in minutes.

6.4

Form, page, call or message?

A Meta lead campaign can end in an instant form, your own website form, a call or a message.⁴³ Pick by how your customers like to reach you, and by who will answer.

TABLE 6.1 4 ROWS

WHERE THE LEAD HAPPENS	BEST WHEN	WATCH OUT FOR
Instant form inside Facebook or Instagram	You want volume and can call back within minutes	Accidental taps: use Higher intent and call back fast
Your own landing page	You already have a page that turns visitors into leads	Meta must see the form sent, through the Meta Pixel on your site or the Conversions API ^{51, 52}
A call	Urgent jobs a person can take live	Run it only in the hours someone answers
A message	Customers who want to ask a question first	Someone must reply within minutes, every hour the ads run

6.5

Teach Meta who buys

Lead ads can aim for the number of leads or for qualified leads. Beginning April 2026, the qualified leads goal needs a Conversions API integration for new campaigns, and existing campaigns are affected starting August 2026.⁵³ Meta's CRM integration sends each lead's stage back, and its requirements are specific. You need at least 200 leads a month. You upload stages at least daily. Leads must reach your target stage within 28 days. Between 1% and 40% of leads must reach that stage.⁵⁴

So pick your branch. **Under 200 leads a month:** optimize for leads, use a Higher intent form, and rate lead quality by hand every Monday. **At 200 or more:** connect the CRM integration and test the qualified leads goal.

Meta's help page describes the goal for instant and website forms, but its developer page describes the integration for instant forms only, so plan on instant forms and check Ads Manager before relying on a website form.^{53, 54}

6.6

Budget and the learning phase

Meta may spend up to 75% over a daily budget on a good day, but a week's spend, Sunday to Saturday, will not pass seven times it. With ad set budget sharing on, those limits rise to 210% a day and 8.4 times a week.⁵⁵ An ad set usually leaves the learning phase after about 50 results in the week after its last significant edit, and editing restarts it.⁵⁶ So one ad set needs roughly $50 \times$ your expected cost per lead each week to learn quickly. If that is out of reach, run fewer ad sets and leave them alone.

METHOD

Hook, Form, Callback, Feedback

01

Hook. A real photo or short video of real work, and one clear offer. Three hooks suit local work: a finished job in a named neighborhood, a before and after, or a plain question about the job, never about the reader.

02

Form. A Higher intent form with one qualifying question that the rules allow.

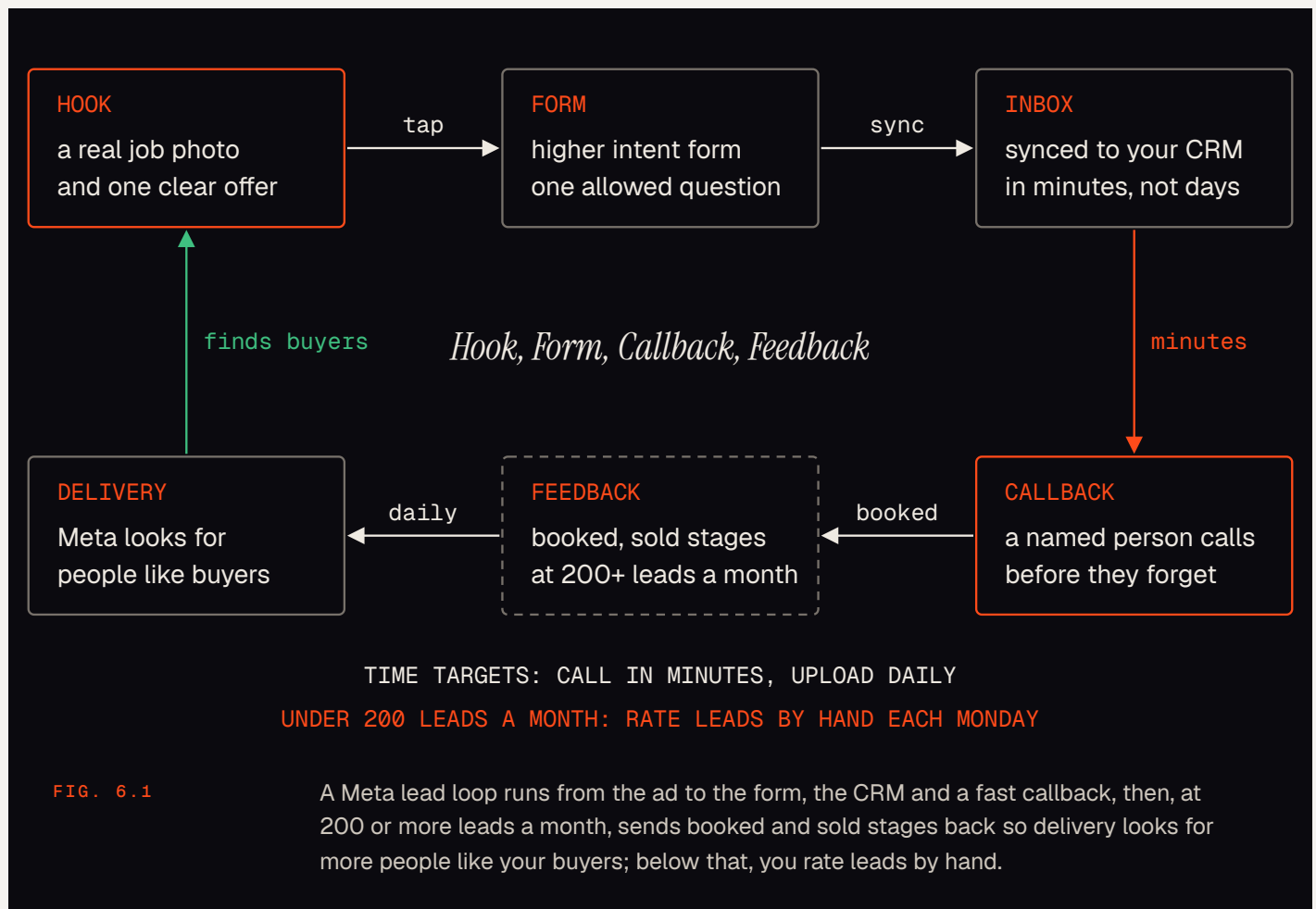
03

Callback. A named person calls every lead within minutes during the hours ads run.

04

Feedback. At 200 or more leads a month, booked and sold stages go back to Meta daily, so delivery learns who became a customer. Below that, rate every lead by hand each Monday.

An offer is a reason to act this week that costs you little to keep: a free inspection, a same-week visit, a fixed-price first service. Name one, state its limit, and make sure the team can deliver it the day the ad runs.


☐ CHECKLIST

6 ITEMS

- ☐ Special Ad Category chosen if the ads are for housing, employment or financial products.
- ☐ Ad text checked for wording that asserts or implies a personal attribute.
- ☐ Higher intent form with one allowed qualifying question.
- ☐ Leads synced to your CRM, not downloaded by hand.
- ☐ A named callback owner for every hour the ads run.
- ☐ Weekly budget sized against about 50 results per ad set.

EXAMPLE*A roofing company tests a Higher intent form*

The ad shows a crew finishing a roof in a named neighborhood, with one offer: a free inspection this week. The form asks one question, “Is the roof leaking now?”, and a person calls every lead within ten minutes during business hours. Leaks go to the front of the line; everyone else gets an inspection slot.

EXAMPLE*A real estate team in the Housing category*

The team selects the Housing Special Ad Category and loses age and ZIP code targeting. Instead of narrowing the audience, it narrows the message: each ad names one neighborhood and one listing or market report, so the right people pick themselves.

Instant Form Builder

Draft each screen of the form here, then check every question against Meta's list of prohibited questions before you publish.

SCREEN	WHAT IT SAYS	FIELD OR QUESTION	ALLOWED?	WHY WE ASK
Intro				
Questions				
Contact details				
Privacy and consent				
Review screen				
Thank you				

NOTES

CHAPTER 6 • IN SHORT

“*On Meta, the form and the callback decide lead quality more than the audience does.*”

-
- 01 Put your service area in audience controls, and use the right Special Ad Category.⁴⁴
-
- 02 Higher intent form, allowed questions only, callback within minutes.
-
- 03 At 200 or more leads a month, send lead stages back through the Conversions API so Meta learns who buys; below that, rate leads by hand.
-

07

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One page, one *offer*

A click is only a visitor; the page decides whether that visitor calls. Here is what a paid landing page must do in its first five seconds, and why a better page also lowers your cost per click.

7.1

The page changes your price

Google's Ad Rank weighs your bid alongside the quality of your ad and landing page, among other factors, and Google says higher quality ads can often lead to lower costs per click.⁹ So the page is a cost lever as well as a sales lever: rerun the ladder in Chapter 1 and see what a better lead rate does to the price you can afford.

Google also sets a floor: the page must work on common browsers and devices, be the website the ad shows, be open to Google's crawler, be reachable where you target, be easy to navigate and offer original content.⁵⁷ Treat that as the minimum; keeping the ad's promise on the page is your job, not Google's rule.

METHOD

The Five-Second Page: Match, Offer, Form, Proof, Phone

01

Match. The headline repeats the words of the search. Someone who searched “water heater repair frisco” reads “Water heater repair in Frisco, today” and knows they are in the right place.

02

Offer. One offer, stated plainly: a free estimate, a same-day visit, a consultation. Try the page without the site menu, so the only ways forward are the form and the phone, and test it (below).

03

Form. The form sits in the first screen on a phone. Ask only what you need to call back: name, phone and one question.

04

Proof. Right under the form: real reviews used with permission, your license number, and photos of real jobs and real people.

05

Phone. A tap-to-call number on a tracked line, so you know which calls came from ads.

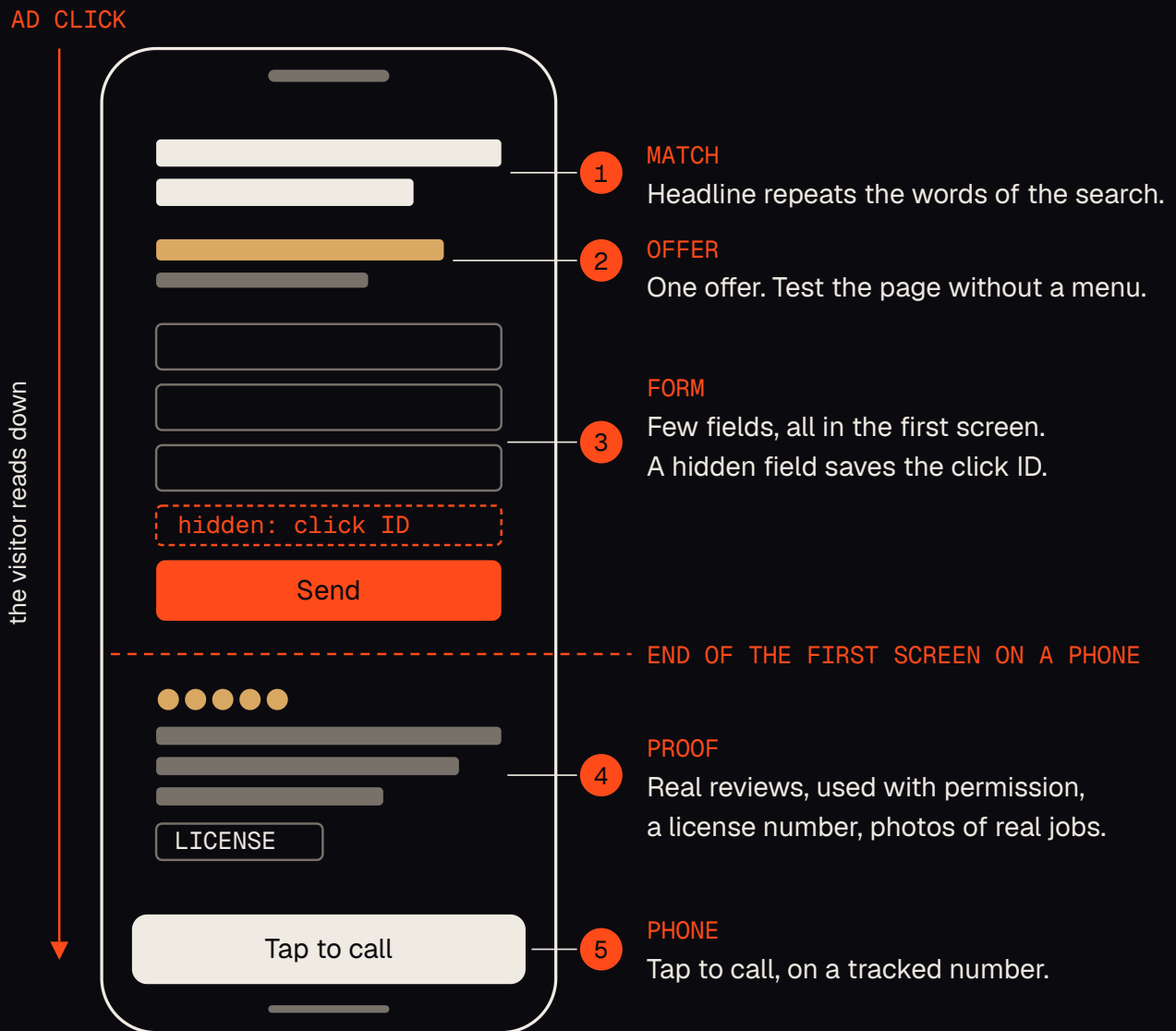


FIG. 7.1

A paid landing page on a phone: the visitor reads from a headline that matches the search to one offer and a short form in the first screen, with proof below and a tracked call bar always in reach.

Removing the menu, in the Offer step, is a rule of thumb, not a law. Test it, and any other big change, the same way. Run the same ads and budget to one version of the page for a few weeks, then the other for the same number of weeks, and compare leads per hundred clicks. Do not call a winner on a handful of leads; wait until each version has dozens.

7.2

Speed that counts

Google's Web Vitals guidance calls a page good when its main content loads within 2.5 seconds (Largest Contentful Paint), it responds to a tap within 200 milliseconds (Interaction to Next Paint) and its layout barely shifts (Cumulative Layout Shift of 0.1 or less), at the 75th percentile of page loads. PageSpeed Insights and Search Console's Core Web Vitals report measure these from real visits.⁵⁸ Test the paid page on a phone.

7.3

The form, and the one field nobody sees

Keep the visible fields few, and add one hidden field that captures the Google click ID from the page address and stores it with the lead.⁵⁹ Chapter 8 shows why that field makes every later measurement possible.

TIP

A sample consent line

Put one plain sentence right above the submit button, for example: “By sending this form, you agree that [business name] may call or text you about your request. Message and data rates may apply. You can opt out at any time.” This is a sample for your attorney to review, not legal advice. Chapter 8 explains the calling and texting rules behind it.

When the form sends, take the visitor to a thank you page with its own address, such as /thank-you. It tells the person what happens next and who will call, and it gives Google Ads a page load to count as the conversion, set up by the page's address with no extra code.⁶⁰ Keep it out of your menus and site search, so only people who sent the form see it.

If you use Google's lead form asset instead of your own page, you must link a privacy policy, and you can download only the last 30 days of leads, while Google Ads keeps them for 60 days.⁶¹ Connect it to your

CRM, or download weekly.

§ RULE

Reviews and testimonials must be real

The Federal Trade Commission's rule on consumer reviews and testimonials took effect October 21, 2024. It prohibits fake reviews and testimonials and rewards that depend on a review saying something positive or negative, and it allows civil penalties for knowing violations.⁶²

The rule does not require a customer's permission before you quote a real review. Ask anyway; it avoids surprises. Keep a record of where each review came from.

7.4

One page per ad group, or let Google choose?

With Final URL expansion on, Google may send people to another page on your site that it judges more relevant; in Performance Max that can be any page you have not excluded, and Google warns it can lead to unintended pages.^{16, 32} For lead generation, keep one page per ad group, and use URL exclusions to fence off pages that should never get ad traffic.³²

☐ CHECKLIST

8 ITEMS

- ☐ The headline repeats the ad group's core search words.
- ☐ One offer, and the page tested with and without the site menu.
- ☐ The form is visible without scrolling on a phone.
- ☐ The phone number is tap-to-call and tracked.
- ☐ Reviews are real and used with permission.

CONTINUED

- ☐ The page passes Core Web Vitals on mobile.
- ☐ A privacy policy is linked from the form, and a consent line sits above the button.
- ☐ A thank you page says what happens next and counts the conversion.

EXAMPLE

A personal injury firm rebuilds its paid page

Before: every click went to the home page, with a menu of twelve practice areas and a contact form four screens down.

After, zone by zone. Match: “Car accident lawyer in Dallas. Free case review.” Offer: one free case review, no menu. Form: name, phone and “When did the accident happen?”, plus the hidden click ID, all in the first screen. Proof: client reviews quoted with written permission and the attorneys' bar admissions. Phone: a tracked tap-to-call bar fixed to the bottom of the screen. The firm judges the change on leads per hundred clicks over the next month, not on looks.

Page Score

Score each line 0 (missing), 1 (partly there) or 2 (done). Anything under 2 gets a fix, an owner and a date.

CHECK	SCORE	FIX	OWNER	DATE
Headline matches the search				
One offer, menu tested				
Form in the first screen				
Three or four fields				
Hidden click ID field				
Proof under the form				
Tracked tap-to-call number				
Core Web Vitals good on mobile				
Privacy policy and consent line by the button				
Thank you page counts the conversion				

CHAPTER 7 · IN SHORT

“*Ask only for what you need to call back. Everything else can wait for the call.*”

-
- 01 Match, Offer, Form, Proof, Phone: the first screen does the selling.
-
- 02 Add a hidden click ID field to every paid form.⁵⁹
-
- 03 Use only real reviews,⁶² and ask before you quote a customer.
-

08

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Tracking that tells the *truth*

A lead is worth what happens in its first few minutes, and every automated bid rests on counting the right conversions. Answer fast, count calls and forms, send booked and sold jobs back to Google and Meta, and handle consent along the way.

8.1

The first five minutes

The close rate in your Break-Even Ladder is set here, not in the ad account. Before you count anything, make sure someone answers.

CHECKLIST

5 ITEMS

- ☐ Name who answers calls, forms and messages for every hour the ads run, including lunch and Saturdays.
- ☐ For the hours nobody can cover, pause the ads with an ad schedule or pay for live answering.
- ☐ Return every missed call and form within minutes, not the next morning.
- ☐ Text back only with the consent your form collected (see the rule later in this chapter).
- ☐ Give every lead an outcome the same day.

TIP

A three line call script

One: "Thanks for calling [business], this is [name]." Two: "What's going on, and where are you?" Three: "I can have someone there [day and time]. Shall I book that?" If you cannot book on the call, say when you will call back, and do it.

Use the same outcomes in your CRM stages, so the counting later in this chapter has something true to count: booked, quote sent, not a fit, no answer, wrong number, spam. Booked is the first result you send back to the platforms; sold follows later from the same record. Wrong number and spam tell you where to set your minimum call length and your form's spam check.

Speed to Lead by Source

Fill in one line per source for one week. Any source where replies take hours is where your close rate leaks.

LEAD SOURCE	WHO ANSWERS	MINUTES TO FIRST REPLY	BOOKED THIS WEEK	OUTCOME TO FIX
Search calls				
Search forms				
Local Services leads				
Meta forms and messages				

NOTES

8.2

Decide what counts

Primary conversion actions appear in the Conversions column and are used for bidding; secondary actions are for watching.⁶³ Make a qualified lead or booked job primary. Keep page views, button clicks and short calls secondary, or untracked.

Until your CRM uploads run, a qualified lead means a call over your minimum length or a form that passes your spam check; make those primary for the first 30 days. Once booked jobs flow back, make booked primary and move calls and forms to secondary, so nothing is counted twice.

8.3

Calls

Google Ads can count calls from your ads, calls to a Google forwarding number on your website, taps on a phone number on your mobile site, and imported calls. For calls from ads and website calls, you set a minimum call length, and every call at least that long counts.⁶⁴ Set it to a real conversation in your business, not a wrong number.

§ RULE

Google Ads call recording is on by default

Call recording is now on by default so Google can qualify leads with AI, unless you turned it off before or your business was identified as healthcare or financial services. Callers hear a short message that the call will be recorded. It works only for US and Canadian numbers through a Google forwarding number.⁶⁵ Decide on purpose: use recordings to learn what callers ask, or switch recording off. If you leave it on, you accept Google's call ads terms and confirm you have told your own staff that calls are recorded. Calls from location assets are not recorded.⁶⁵

8.4

Forms

A form counts only if something tells Google Ads it was sent. Ask your web person for four things, and check each one yourself.

TABLE 8.1 4 ROWS

ASK FOR	WHAT IT DOES	HOW YOU CHECK IT
The Google tag on every page	Lets Google Ads measure what people do after the click ⁶⁶	Google Ads finds it when you scan your site while creating a conversion ⁶⁰
A conversion that counts the thank you page	Counts a form each time the thank you page loads, set by its address ⁶⁰	Send a test form; the conversion's Status column shows it working ⁶⁰
A hidden field that saves the click ID	Stores the GCLID with the lead, so a later sale can be matched to its click ⁵⁹	Your test lead reaches the CRM with a long code in that field
Tracked call numbers	A Google forwarding number counts calls over your minimum length ⁶⁴	Call from a mobile phone, talk past the minimum, and look for it the next day

Turn on auto-tagging so Google adds the click ID, the GCLID, to each ad click; the hidden field then passes it into your CRM with the lead.⁵⁹ Every lead then carries the ID of the click that produced it. If you have never set up offline imports, Google now recommends starting with enhanced conversions for leads, which matches your uploads by hashed contact details and still uses the GCLID when you have it; keep the hidden field either way.^{67, 68}

8.5

Send results back

When a lead becomes a booked job or a sale, you import that result into Google Ads, matched by the click ID or, with enhanced conversions for leads, by hashed contact details such as an email address.⁶⁸ Two clocks run from the last click. Offline conversions uploaded more than 90 days after it are not imported. For enhanced conversions for leads, the limit is 63 days.⁶⁷ Upload weekly and you will never be close.

63 days

after the last click: the deadline for enhanced conversions for leads uploads (90 days for offline conversions by click ID)

SOURCE 67

If software sends your uploads automatically, check one thing: starting June 15, 2026, Google moved these uploads from the Google Ads API to the Data Manager API.⁶⁸ Confirm yours moved too, or results may have stopped arriving unnoticed.

The default click-through conversion window is 30 days, adjustable from 1 to 90 depending on the source;⁶⁹ if sales take six weeks, a 30 day window drops real sales. Google Ads now offers only data-driven and last click attribution, with data-driven the default for most actions; first click, linear, time decay and position-based are gone.⁷⁰

On Meta, the CRM integration does the same job, matching stages by the Meta lead ID or by click ID, phone or email.⁵⁴

METHOD

The Closed Loop: Capture, Connect, Qualify, Return

- 01** **Capture.** Save the click ID in a hidden form field, and route calls through tracked numbers.
- 02** **Connect.** Store the click ID or caller details on the lead's CRM record.
- 03** **Qualify.** Move each lead through stages your team really uses: booked, sold, value.
- 04** **Return.** Send stages back inside the time limits: weekly or better for Google, daily for Meta.

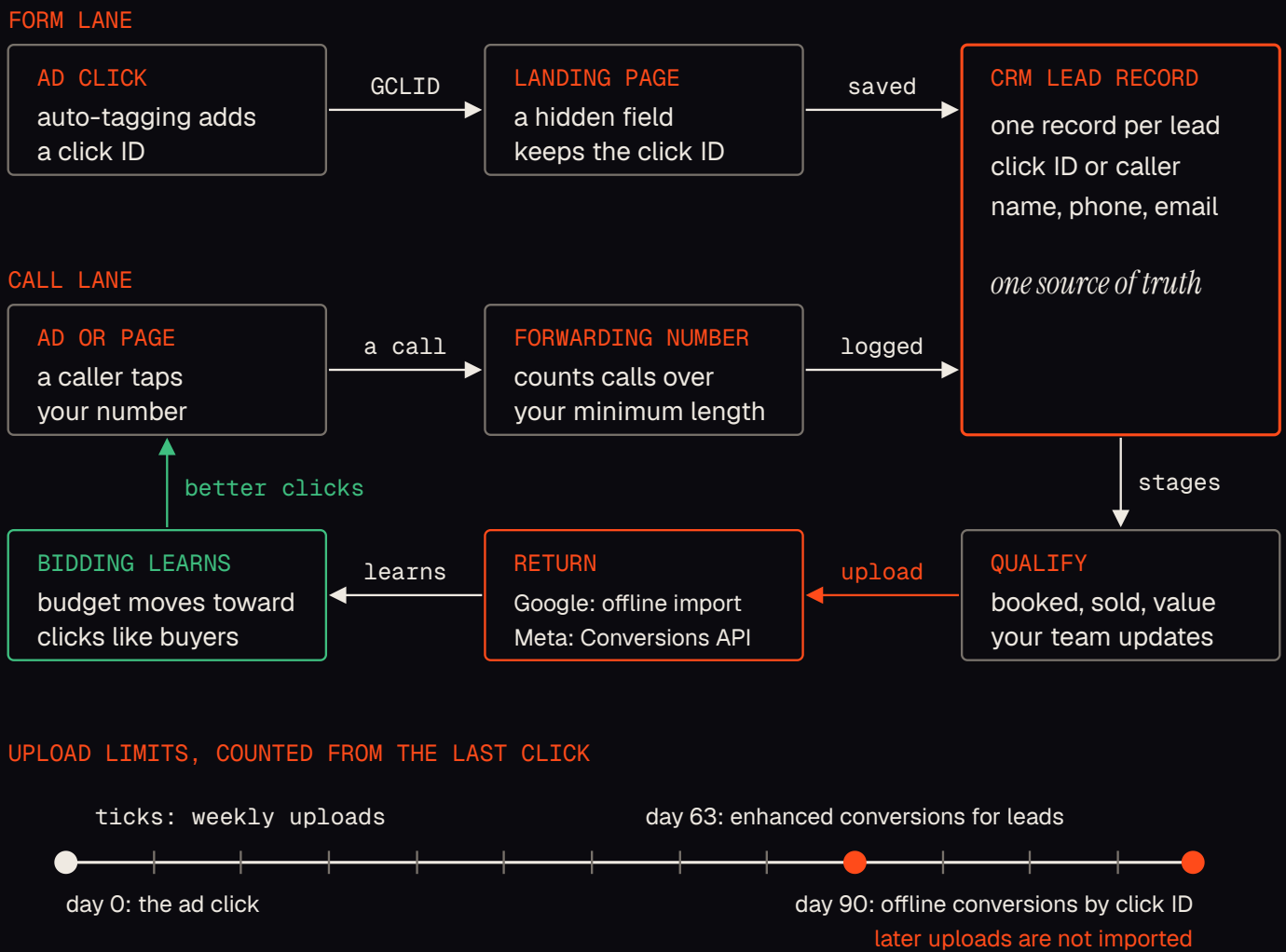


FIG. 8.1

Forms and calls feed one CRM record, your team marks booked and sold, and the results go back to Google and Meta inside the upload limits so bidding learns which clicks become customers.

8.6

Consent and privacy

§ RULE**What the platforms and the FCC require**

Google. If you send customer data for measurement, tell customers you share it with third parties for ad measurement, and get consent where the law requires it; never upload conversion data related to sensitive categories.⁷¹ In applicable US states, when Google receives a Global Privacy Control signal it turns off ads targeting and applies restricted data processing; you remain responsible for your own compliance.⁷²

Meta. Limited Data Use is a data processing option for US state privacy laws that you must switch on yourself, and Texas is among the covered states.⁷³

Calling and texting leads back. FCC rules require consent before autodialed or prerecorded calls or texts to a wireless number.⁷⁴ When those calls or texts market something, which covers promotional texts and prerecorded sales calls, the consent must be written.⁷⁵ People may withdraw consent at any time, in any reasonable way.⁷⁴ Put a plain consent line by the submit button (Chapter 7 has a sample), honor every opt-out at once, and have a person make the first callback.

! WARNING**Medical and dental practices**

On June 20, 2024, a federal court vacated the part of HHS's tracking technology guidance that said HIPAA applies when a tool links a visitor's IP address to a visit to a public page about specific health conditions or providers, and HHS said it is evaluating next steps. HHS still says tracking on pages behind a login, such as patient portals, generally has access to protected health information, and that public pages for booking appointments or checking symptoms may too.⁷⁶

Add Google's limits on health audiences⁶ and Meta's data source categories, which can restrict what a health site sends,⁷⁷ and the safe rule is: no ad tags on patient portals or booking steps, and counsel reviews any tag on a health page. Meta also bars sending health information through its

pixel.⁵¹ Google's customer data policy treats health or medical information, such as purchases of medical services, as a sensitive category whose conversions can't be uploaded for enhanced conversions, so a medical or dental practice should not upload booked or sold patient results without counsel's sign-off.⁷¹

☐ CHECKLIST

7 ITEMS

- ☐ Primary conversions: qualified calls and forms for the first 30 days, then booked jobs; everything else secondary.

- ☐ Minimum call length chosen, and call recording on or off by your decision.

- ☐ Google tag on every page, a thank you page conversion, and the hidden click ID field live and tested.

- ☐ Booked and sold stages uploaded at least weekly, well inside 63 days.

- ☐ Automated uploads confirmed on the Data Manager API.

- ☐ Privacy policy discloses measurement sharing; Limited Data Use and Global Privacy Control handled.

- ☐ Medical and dental: no tags on portals or booking steps without a legal review.

EXAMPLE

An HVAC company in McKinney closes the loop

The company counts form fills and calls over a minimum length it chose after listening to a week of recordings. Every night its CRM uploads two stages to Google Ads: booked and sold. Booked is primary, because it happens within days of the click and gives bidding a steady signal. Sold stays secondary until there are enough sales each month to steer by.

Conversion Action Inventory

List every conversion action in your account. If you cannot say why a line is primary, make it secondary.

ACTION	SOURCE: CALL, FORM OR IMPORT	PRIMARY OR SECONDARY	VALUE	UPLOAD SCHEDULE

NOTES

CHAPTER 8 • IN SHORT

“*If you cannot tell which click became a customer, every automated bid is a guess.*”

-
- 01 Answer every lead within minutes; that is where the close rate is set.
-
- 02 Only a qualified lead or booked job should be primary.⁶³
-
- 03 Capture the click ID, and upload results weekly, inside the 63 and 90 day limits.⁶⁷
-
- 04 Disclose measurement sharing, honor consent, and keep tags off health portals.
-

09

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Budgets, bidding and *pacing*

Start from the customers you want, not from a round number. Then learn how each platform spends a daily budget, which is an average, not a limit; which bid strategy fits each stage; and how to read spend so the month holds no surprises.

METHOD

Budget from the Goal

01

Customers. Decide how many new customers a month you want from ads, and can serve.

02

Leads. Divide by your close rate (line D in Chapter 1) to get the leads you need.

03

Price. Estimate the cost per lead: the planner's cost per click divided by your lead rate (line F). If that is above your break-even cost per lead (line E), fix your rates before you spend.

04

Budget. Leads needed $\times$ cost per lead is the monthly budget. Divide it by 30.4 for Google's average daily budget.⁷⁸

05

Check. Hold the number against three months of cash and the jobs your crew can take, then split it across campaigns with the Service, Place, Promise Grid (Chapter 2).

Respect two platform floors. Google suggests a budget of at least 10 leads a week for Local Services Ads on Maximize leads,³⁹ and a Meta ad set learns fastest at about 50 results a week (Chapter 6).⁵⁶ If your goal math gives less than a floor, put the money into one campaign or ad set instead of spreading it thin.

EXAMPLE

A two truck garage door company budgets from its goal

Invented numbers. The owner wants 20 new customers a month from ads, and the crews can take 25 more jobs. Four in ten leads become customers, so the company needs 50 leads. The planner shows about \$7 a click and one in ten clicks becomes a lead, so a lead costs about \$70, under the \$120 break-even. The budget is $50 \times \$70 = \$3,500$ a month, about \$115 a day.

CONTINUED

Three months of that is \$10,500, which the owner can carry. The grid splits it: \$2,600 a month to emergency spring repair, about \$86 a day, and \$900 to new door installs, about \$30 a day.

9.1

How Google spends a budget

On a given day a Google Ads campaign can spend up to twice its average daily budget, and in a billing period you are never charged more than 30.4 times the average daily budget.⁷⁸ So the number to plan around is the monthly ceiling: daily budget $\times$ 30.4. An ad schedule does not lower that ceiling: Google still paces toward 30.4 times the daily budget, so a weekday-only schedule spends more on each active day, up to twice the daily budget.⁷⁹

30.4 $\times$ *your average daily budget: the most Google charges a campaign in a billing period*

SOURCE 78

9.2

How Meta spends one

Meta may spend up to 75% over a daily budget on a good day, but a week's spend, Sunday to Saturday, will not pass seven times the daily budget. If you turn on ad set budget sharing, one ad set can take up to 210% of its daily budget on a day and 8.4 times it in a week, borrowed from your other ad sets.⁵⁵ Plan Meta by the week: daily budget $\times$ 7, or $\times$ 8.4 for an ad set that shares.

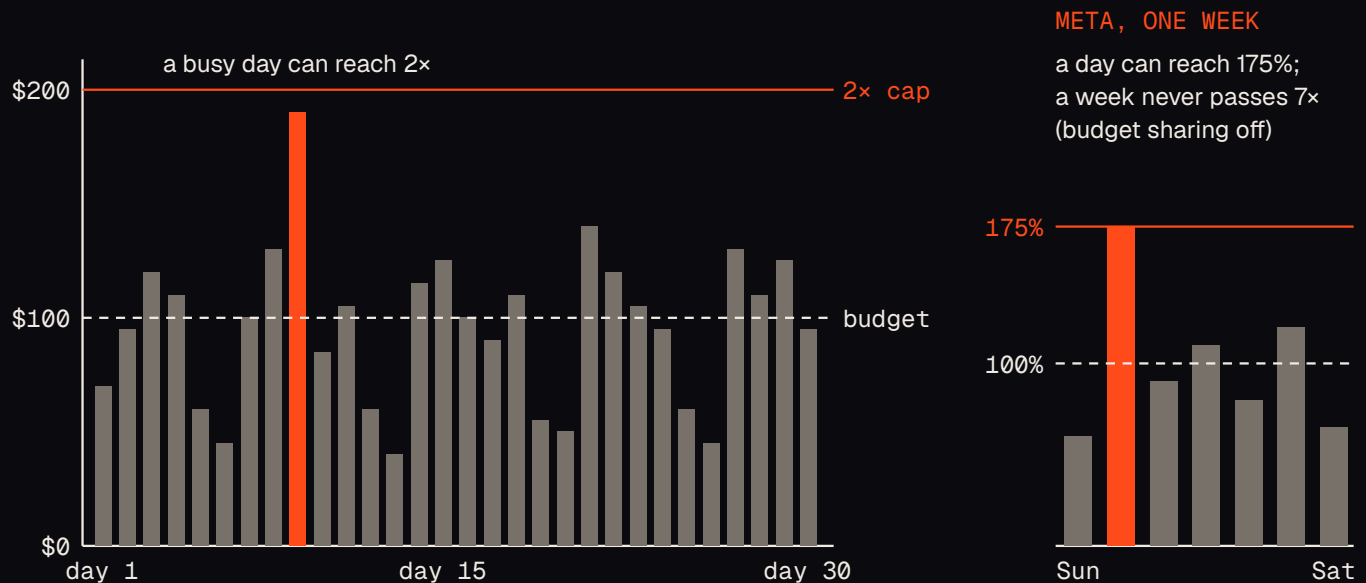
Budget from the Goal

Redo it every quarter, and whenever your close rate or lead rate moves.

LINE	WHAT IT IS	HOW TO GET IT	YOUR NUMBER
1	New customers a month from ads	Your goal, capped by capacity	
2	Leads needed	Line 1 ÷ close rate	
3	Expected cost per lead	Planner cost per click ÷ lead rate	
4	Monthly budget	Line 2 × line 3	
5	Google average daily budget	Line 4 ÷ 30.4	
6	Three months of cash	Line 4 × 3, checked against the bank	

NOTES

EXAMPLE MONTH: \$100 AVERAGE DAILY BUDGET



The month can never pass $30.4 \times \$100 = \$3,040$. This example: \$2,880.

FIG. 9.1

Google lets one day run up to twice the daily budget but caps the month at 30.4 times it, and Meta, with budget sharing off, lets one day run to 175% but caps the week at seven times it, so plan by the month and the week, not by the day.

9.3

Pick your bid strategy

Google's strategies are Maximize conversions or Target CPA (cost per action, the average you pay for a conversion), Maximize conversion value or Target ROAS (return on ad spend, the conversion value you get back for each dollar), Maximize clicks and Target impression share, plus manual CPC.³⁸ Target impression share suits a brand campaign more than a lead campaign. Enhanced CPC is gone for Search and Display since the week of March 31, 2025.⁸⁰

9.4

Target CPA after August 17, 2026

Google recommends starting Target CPA at your average cost per conversion over the last 30 days, adjusted for conversion delays; some conversions will cost more than the target and some less.⁸¹ On August 17, 2026, Google changed target-based bidding for budget-limited campaigns: those beating their Target CPA or Target ROAS now trend toward the target you set. Google's own example: a \$10 target that was getting \$5 conversions will now trend toward \$10.⁸²

So the old advice to set a loose target and let the system beat it is now wrong. Set the target you actually want to pay; Google's Bid Target Adjustment Tool helps you review them.⁸²

METHOD

The Bidding Ladder

- 01 **Rung 1: control.** Until tracking proves itself, use manual CPC with your working ceiling (line H) as your bid, or Maximize clicks with H as its maximum CPC bid limit; AI Max search term matching does not work with manual CPC.^{18, 83} Each Monday, compare the average cost per click with H.
- 02 **Rung 2: volume.** Maximize conversions once qualified conversions are counted and steady.
- 03 **Rung 3: price.** Target CPA, set at your real average cost per conversion from the last 30 days.⁸¹
- 04 **Rung 4: value.** Maximize conversion value or Target ROAS, once sold job values flow back from your CRM.
- 05 **One rung at a time.** After each move, wait one to two conversion cycles before judging.²

9.5

Learning periods

After a bid strategy change, expect one to two conversion cycles of calibration (manual CPC has no learning period).² A Meta ad set usually leaves learning after about 50 results in a week,⁵⁶ and Local Services Ads take about 2 weeks to show accurate results.³⁹ Log the date of every change, and do not judge it, or change anything else, until its learning period has passed.

9.6

Is more budget worth it?

Search lost impression share (budget) is the share of time your ads did not show because the budget ran out; lost impression share (rank) is the share lost to low Ad Rank.⁸⁴ Add money only to campaigns losing to budget whose cost per lead is under your ceiling. A campaign losing to rank needs a better ad, page or bid.

For a promotion, a new Search, Performance Max or Shopping campaign can use a campaign total budget for 3 to 90 days: Google paces it to spend by the end date, with no daily spending limit, and never charges more than the total. You choose it when you create the campaign, and an existing campaign cannot switch.⁸⁵

☐ CHECKLIST

6 ITEMS

☐ A monthly budget set from the goal, and checked against cash and capacity.☐ A monthly ceiling written for every Google campaign (daily $\times$ 30.4).☐ A weekly ceiling written for every Meta campaign (daily $\times$ 7).☐ Target CPA reviewed since the August 17, 2026 change.☐ Lost impression share (budget) checked before any budget increase.☐ No bid strategy change during a learning period.

EXAMPLE

A three location HVAC company moves money

Invented numbers. The Plano campaign loses 40% of its impressions to budget at \$70 a lead, under a \$90 break-even. The Allen campaign loses half to rank at \$110 a lead. The owner moves \$20 a day from Allen to Plano and rebuilds Allen's landing page instead of adding money.

In September, Plano's cost per lead drifts up toward the loose \$120 Target CPA set last spring: the August 17 change at work. The owner resets the target to \$75, near the real 30 day average, and waits one to two conversion cycles before judging.

Monthly Budget and Pacing

Straight-line pace = monthly ceiling × days passed ÷ days in the month.

CAMPAIGN	MONTHLY CEILING	SPEND TO DATE VS PACE	LOST IS: BUDGET, RANK	ACTION

NOTES

CHAPTER 9 · IN SHORT

-
- 01 Budget = customers wanted $\div$ close rate $\times$ cost per lead, checked against cash and capacity.
-
- 02 Plan Google by the month (daily $\times$ 30.4) and Meta by the week (daily $\times$ 7).^{55, 78}
-
- 03 Climb the Bidding Ladder one rung at a time, and set Target CPA at your real cost.⁸²
-
- 04 Add budget only where share is lost to budget and cost per lead is under your ceiling.
-

10

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The weekly *review* and clean clicks

A healthy account is kept, not built: 30 minutes a week and an hour a month. What people call click fraud, Google calls invalid traffic. Here are both routines, what Google, Meta and Local Services Ads credit for invalid clicks and leads, and how to build evidence when something looks wrong.

METHOD

The 30 Minute Monday

- 01 **Pace, 5 minutes.** Compare spend to date with the straight-line pace toward each monthly ceiling (Chapter 9).⁷⁸
- 02 **Search terms, 10 minutes.** Decide every line with spend: promote to exact, add as a negative, or leave on purpose.²⁸
- 03 **Leads, 10 minutes.** Listen to three calls, read five forms, and log every Local Services lead. Ask one question: would I want more of these?
- 04 **Invalid clicks, 3 minutes.** Read the Invalid clicks column and look for spikes in clicks without leads.¹
- 05 **Page and form, 2 minutes.** Load each paid landing page on a phone and send one test form. Confirm it arrived with its click ID.

METHOD

The Month-End Five

- 01 **Uploads, 10 minutes.** Booked and sold stages are current and well inside the 63 and 90 day limits.⁶⁷
- 02 **Credits, 10 minutes.** Note invalid click credits from Google and automatic lead credits from Local Services Ads against your own logs.^{1, 40}
- 03 **Impression share, 10 minutes.** Compare share lost to budget with share lost to rank for every campaign.⁸⁴
- 04 **Targets, 10 minutes.** Compare each Target CPA with the real cost per lead of the last 30 days.^{81, 82}
- 05 **Changes and verdicts, 20 minutes.** Reread the help pages for fast-changing features (AI Max, Performance Max, Meta lead goals, Local Services credits), rerun the Break-Even Ladder, and decide scale, hold or cut for each campaign.



10.1

Invalid clicks, plainly

Google removes invalid traffic it finds before the end of your billing cycle from your metrics and your bill, and credits invalid traffic it finds after you are invoiced, where appropriate and possible. The Invalid clicks column shows what it filtered. If you suspect more, you can request an investigation for activity within the last 60 days, with your server logs, IP addresses, click IDs and lead details.¹

60 days

how far back Google will investigate invalid traffic you report

SOURCE 1

Meta treats accidental, repeated and bot or fake account clicks as invalid, reviews suspicious activity it detects or is alerted to, and says you will not be charged for clicks it finds invalid.⁸⁶ Its page does not describe a request form, so keep the same evidence and ask Meta's business support, checking the Meta Business Help Center for the current route. Local Services Ads credit low quality leads automatically, usually within 30 days.⁴⁰ Expect no more than that: a click that did not become a lead is not, by itself, invalid.

10.2

What you can do yourself

☐ CHECKLIST

5 ITEMS

- ☐ Test the Presence location option, which leaves out people outside your area who only showed interest in it.¹⁴
- ☐ Compare search partners' cost per lead, and keep them only if they pay.¹⁵
- ☐ Exclude repeat IP addresses: up to 500 per campaign, and through the account-level list for Performance Max. An exclusion blocks only the addresses you list, and one address can appear in more than one version, so list each.¹³
- ☐ Add a spam check to your forms, and never count spam as a conversion.
- ☐ Keep server logs, and store the click ID with every lead, so you have evidence when you need it.¹

A click monitoring tool, the kind that watches for repeat clicks and adds IP exclusions for you, can spot and document patterns you would miss. It cannot get money back on its own: only the platform's review can, inside

its time limit, and the tool still works within the platform's exclusion limits.^{1, 13} Start with the free steps above.

10.3

Where the settings live

These are the paths Google's own help pages give in September 2026. Google and Meta move menus often; if a path has changed, search for the setting's name in the platform's Help Center.

TABLE 10.1 12 ROWS

SETTING	WHERE TO FIND IT IN GOOGLE ADS
Search terms report	Campaigns, then Insights and reports, then Search terms ²⁸
Invalid clicks column	Campaigns, then the Columns icon; search for “Invalid clicks” ¹
Impression share columns	Campaigns, then the Columns icon, then Competitive metrics ⁸⁴
Negative keyword lists	Tools, then Exclusion lists, then the Negative keywords lists tab, then Apply to campaigns ⁸⁷
Account-level negatives and IP exclusions	Admin, then Account settings ^{12, 13}
Call recording	Admin, then Account settings, then Call ads ⁶⁵
Search partners	Campaigns, then the gear icon beside the campaign, then Networks ¹⁵
Conversion actions, primary or secondary	Goals, then Conversions, then Summary ^{60, 63}
Call, location, sitelink and callout assets	Campaigns, then Assets ²²
Bid strategies	Tools, then Bid strategies ⁸³
Keyword Planner	Tools, then Keyword planner ⁷
Local Services lead feedback	In Local Services Ads: the menu, then Leads, then Rate this lead ⁴⁰

EXAMPLE

A plumbing company sees an evening spike

On a Tuesday evening, clicks on one campaign jump to several times their usual level, with no calls and no forms. On Wednesday the owner opens the Invalid clicks column: Google has already filtered part of the spike. The server logs show the same few IP addresses clicking again and again.

The owner adds those addresses to the account-level exclusion list, saves the logs with their click IDs, and files an investigation request that week, well inside the 60 day window.¹, ¹³ Every step goes into the incident log, and the result is checked at month end.

WORKSHEET

Weekly Review Log

One line every Monday. The log is also your evidence when you ask a platform to investigate.

DATE	SPEND VS PACE	NEGATIVES ADDED, TERMS PROMOTED	LEADS REVIEWED, INVALID CLICKS	ACTIONS AND CHANGES

NOTES

Open a line the day something looks wrong. The request must go in within 60 days of the activity.

DATE RANGE AND CAMPAIGN	WHAT LOOKED WRONG	EVIDENCE KEPT	REQUEST SENT	OUTCOME

NOTES

[illegible]

CHAPTER 10 · IN SHORT

“*Thirty minutes every Monday beats a rescue project every quarter.*”

-
- | | |
|----|---|
| 01 | Run the 30 Minute Monday weekly and the Month-End Five monthly. |
| 02 | Google filters and credits invalid traffic itself; you can ask for a review of the last 60 days. ¹ |
| 03 | Keep logs and click IDs: they are your evidence. |
-

TOOL · PLAN

Your 30, 60, 90 day plan

START DATE _____

Work in order, and start the 30 Minute Monday in week one. Each line ends with who does it and our rough guess at the hours.

DAYS 1 TO 30

Measure and fence

- ☐ Do the Break-Even Ladder and the Green Light Test (Chapter 1). You, 2 hours.
- ☐ Name who answers each hour the ads run (Chapter 8). You, 2 hours.
- ☐ Build pages for your top two services (Chapter 7). Web person, 6 to 10 hours.
- ☐ Install the four tracking pieces (Chapter 8). Web person, 3 to 5 hours.
- ☐ Set the budget from your goal and launch fenced Search (Chapters 2, 3 and 9). Ads person, 5 hours.
- ☐ Start Local Services Ads verification if eligible (Chapter 5). You, 1 to 2 hours.

DAYS 31 TO 60

Connect and qualify

- ☐ Upload booked jobs weekly and make booked primary (Chapter 8). CRM person, 4 hours.
- ☐ Move Search to Maximize conversions when steady (Chapter 9). Ads person, 1 hour.
- ☐ Test a Meta Higher intent form with fast callbacks (Chapter 6). Ads person, 3 hours.
- ☐ Turn on Local Services Ads and log every lead (Chapter 5). You, 2 hours.
- ☐ Run your first Month-End Five (Chapter 10). You, 1 hour.

DAYS 61 TO 90

Steer and scale

- ☐ Set Target CPA at your real recent cost (Chapter 9). Ads person, 1 hour.
- ☐ Open the funnel only on profitable campaigns (Chapter 3). Ads person, 1 hour.
- ☐ Add Performance Max after Set, Suggest, Surrender (Chapter 4). Ads person, 4 hours.
- ☐ At 200 or more Meta leads a month, connect your CRM (Chapter 6). CRM person, 4 hours.
- ☐ Run the second Month-End Five: scale, hold or cut (Chapter 10). You, 1 hour.

TOOL · SCORE

Score yourself

Give each line 0 if it is not true, 1 if it is partly true and 2 if it is true. Be strict.

Then add up the column.

	STATEMENT	SCORE		
01	My break-even cost per lead and cost per click are written down.	0	1	2
02	Someone answers every call and form within minutes during the hours ads run.	0	1	2
03	My location option and my search partners setting are deliberate choices.	0	1	2
04	Each ad group lands on one page with one offer and the form in the first screen on a phone.	0	1	2
05	I read the search terms and added negatives in the last 7 days.	0	1	2
06	Only a qualified lead or booked job is a primary conversion.	0	1	2
07	Calls are tracked, with a minimum length that means a real conversation.	0	1	2
08	Booked and sold jobs flow back to every ad platform I use, inside its time limits.	0	1	2
09	My automated campaigns have brand exclusions, negatives and landing page controls.	0	1	2
10	My Local Services hours and job types are exact and every lead is logged (score 2 if you do not run them).	0	1	2
11	I check impression share lost to budget before I change any budget.	0	1	2
12	I check invalid clicks and credits monthly and keep my logs.	0	1	2

Total, out of 24

YOUR TOTAL SAYS

20 to 24.

You are steering well. Keep the Monday routine and rerun the ladder each month.

12 to 19.

You are leaking money in known places. Fix your lowest scores first, one a week.

0 to 11.

Pause new spend and work through Days 1 to 30 of the plan.

WORDS

Glossary

Actual CPC

What you really pay for a click, often less than your maximum bid.⁸

Ad Rank

The score that decides whether and where an ad shows, weighing the bid, ad and landing page quality and other factors.⁹

Advantage+

Meta's automated settings for budget, audience and placements, on by default in an Advantage+ leads campaign.⁴³

AI Max

A set of features inside a Search campaign: search term matching, text customization and Final URL expansion.¹⁶

Break-even cost per click

The most you can pay for a click before ads lose money: $\text{profit} \times \text{share} \times \text{close rate} \times \text{lead rate}$ (Chapter 1).

Close rate

The share of leads that become customers: $\text{customers} \div \text{leads}$ (Chapter 1).

Conversion

An action you count as a result of an ad, such as a qualified call, a form or a booked job. Primary conversions steer bidding.⁶³

Conversions API

Meta's way to receive events, including website events and CRM lead stages, from your own systems.^{52, 54}

CPA

Cost per action: what you pay on average for one conversion. Target CPA bids toward the one you set.³⁸

CPC

Cost per click. With manual CPC bidding you set the most you will pay for a click.⁸

CRM

Customer relationship management: the system where you keep every lead and customer record and its stage.

Enhanced conversions for leads

A way to send offline results to Google matched by hashed contact details, such as an email address.⁶⁸

Final URL expansion

A setting that lets Google send clicks to pages other than the one you chose.³²

GCLID

The Google click ID added to each ad click, so a later sale can be matched to it.⁵⁹

Impression share

The impressions your ads received divided by the impressions they were eligible to receive.⁸⁴

Instant form

A Meta lead form that opens inside Facebook or Instagram, in More volume, Higher intent or Rich creative types.⁴⁸

Invalid click

A click that does not reflect genuine interest, such as an accidental, repeated or automated click. Often called click fraud.^{1, 86}

Lead rate

The share of clicks that become a call or form: leads ÷ clicks. Google Ads calls it the conversion rate (Chapter 1).

Learning period

The time a bid strategy or ad set needs to calibrate after a change: one to two conversion cycles on Google, about 50 results on Meta, where it is called the learning phase.^{2, 56}

Local Services Ads

Google ads for local service providers that charge per valid lead and carry a Google Verified badge.^{10, 42}

Match type

The setting that controls how closely a search must relate to your keyword: broad, phrase or exact. Broad is the default.²⁶

Negative keyword

A word or phrase that stops your ad from showing on searches that contain it.²⁷

Performance Max

A Google campaign type that reaches all Google Ads channels from one campaign.²⁹

Primary conversion

A conversion action used for bidding; secondary actions are only watched.⁶³

ROAS

Return on ad spend: the conversion value you get back for each dollar of ads. Target ROAS bids toward the one you set.³⁸

Search partners

Other websites that show Google search ads, included in new Search campaigns unless you opt out.¹⁵

Search terms report

The list of actual searches that triggered your ads.²⁸

Smart Bidding

Google's automated bid strategies that aim for conversions or conversion value.³⁸

Special Ad Category

Meta's label for ads about housing, employment or financial products and services, which get limited targeting, and ads about social issues, elections or politics, which need authorization and a "Paid for by" disclaimer.⁴⁶

Target CPA

A bid strategy that aims for an average cost per conversion that you set.⁸¹

EVIDENCE

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Every source below is a primary page from the platform, regulator or standards body itself. Each was read on September 29, 2026. Help pages move and change; if a link has moved, search for its title on the publisher's site.

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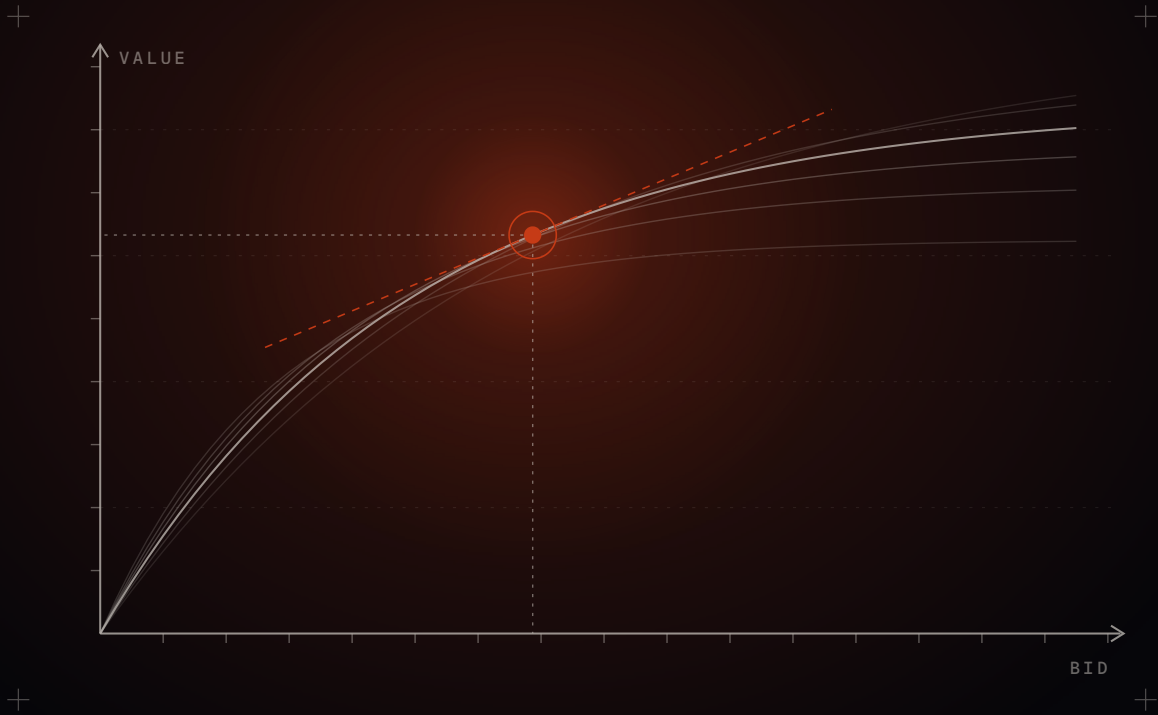
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