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A MUNRO AGENCY GUIDE

Meta advertising for *B2B agencies.*

How to advertise on Facebook and Instagram, train the pixel on qualified behaviour, and turn cold traffic into booked calls — the gatekeeper method.



THE MUNRO AGENCY LIMITED · GLASGOW

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OUTCOME OF THIS GUIDE

Build a Meta funnel that reliably attracts the right prospects, filters out poor-fit leads, and nurtures intent until prospects book calls and buy.

CHAPTER 1

Why most Meta lead generation fails

Meta needs volume to learn. Booked calls are too low-volume for most B2B budgets, so agencies optimise too deep too early and poison the learning. Interest targeting and lookalikes are increasingly ignored by the algorithm. The result: lots of leads, poor quality, no revenue.

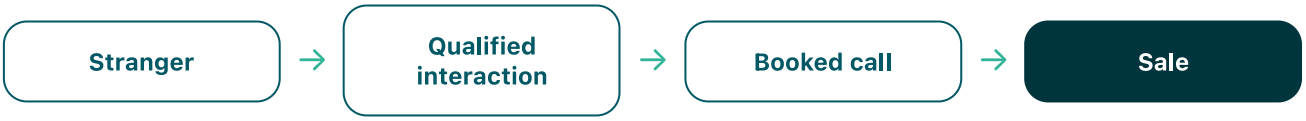
WHAT AGENCIES DO	WHAT META LEARNS
Optimise for clicks	Attracts low-intent traffic; the algorithm learns to find people who click
Optimise for booked calls	Too little data — the algorithm never leaves the learning phase
Send everyone to the conversion event	Noisy, contradictory signals; the wrong patterns are reinforced
Rely on interest stacks and lookalikes	Demographics are not what the pixel learns from

The fundamental principle

You cannot train the algorithm on outcomes you cannot generate at scale.

The pixel only learns from what you allow through. Quality comes from filtering **before** optimisation, not after. Meta's job is to find more people like the ones you define as success — so define success carefully.

The funnel model



The three filters you must control

FILTER	NAME	WHAT IT ANSWERS	CAN IT BE CHANGED?
1	Identity	Who they are — role, company type, geography, size	No. Identity cannot be changed by marketing.
2	Problem fit	What they need solved, and whether you solve it	No. Either you solve it or you don't.
3	Intent	How ready they are to buy	Yes. Intent is developed through trust and nurture.

Most funnels fail because they optimise for the wrong conversion too early. This method separates qualification from selling: first filter for the right people, then build intent, then invite the call.

CHAPTER 2

The funnel architecture

High-level workflow for predictable agency client acquisition. Only qualified signals train the algorithm; unqualified traffic is served but never reported back to Meta.

1 · COLD META TRAFFIC
Facebook and Instagram
Strangers who have never seen you; algorithm-driven reach

↓

2 · PSYCHOLOGICALLY OPTIMISED VIDEO AD
Identity callout · Problem & sub-problems · Core offer as outcome · Benefits · Proof · Low-barrier next step

↓

3 · GATEKEEPER QUALIFICATION LAYER
Role · Problem fit · Timing · Size proxy

✕ Unqualified → not reported to Meta

✓ Qualified leads → Offer Lead event fires

↓

4 · NEXT STEP ASSET
Offer document or "how it works" asset
Immediate value · confirms fit · sets expectations

↓

5 · INTENT AND TRUST DEVELOPMENT
Email nurture · Retargeting video ads · Case studies · Process explanations · Authority content

Low intent → high intent. Intent can be developed; identity cannot be changed.

↓

6 · WARM RETARGETING CAMPAIGN
Repetition builds trust and familiarity — the mere-exposure effect

↓

7 · SALES CALL
Strategy · diagnosis · ROI review
Call happens after trust and intent exist — higher show rate, higher close rate

FEEDBACK LOOP

Only qualified signals — Offer Lead events and booked calls — are reported back. Meta learns from these to find more of the same people in the cold campaign.

MESSAGE DOES THE FIRST FILTER

The ad attracts the right people and repels the wrong ones before the form ever loads.

TWO CAMPAIGNS

Cold (steps 1–3) and warm (steps 5–6) run with separate budgets and measurement so learning is clear.

How Meta learns from funnel signals

Signal quality improves as traffic moves through the funnel, but volume falls. Optimise where volume and intent intersect.

STAGE	WHO IS HERE	SIGNAL QUALITY	OPTIMISE HERE?
All traffic	Broad audience, mixed intent, low buying power	Low and inconsistent	No
Clicks or basic leads	Higher volume, poor intent filtering	Still noisy	No
Gatekeeper filter	Qualification questions applied	Filtering happens here — before optimisation	—
Offer Lead event	Only qualified users reach this stage	**Strong and consistent**	**Yes** — when budget cannot support deeper events
Booked calls and sales	Low volume, high value outcomes	Excellent but too sparse	Only with volume — Meta cannot learn from outcomes it does not see often enough

KEY TAKEAWAY

- The pixel improves when it receives frequent, high-quality signals.
- Gatekeeping controls who is allowed to train the algorithm.
- Optimise where volume and intent intersect.

CHAPTER 3 · STEPS 1–2

Define the offer and the ICP

Step 1: define the core offer

1. Pick one painful business problem you solve.
2. Define the outcome in one sentence — specific and measurable.
3. Define who it is for, and who it is not for.
4. Define deliverables, timeline and boundaries.
5. Define proof: case studies, numbers, examples.

DO	DO NOT
Sell outcomes, not activities	Sell strategy as the main paid product
Keep it narrow and specific	Bundle everything into one vague offer
Watch out: overpromising guarantees you cannot control.	

Step 2: write your ICP as practical filters

FILTER	DIMENSION	WRITE IT AS
1	Identity	Role, company type, geography, size proxy
2	Problem fit	The specific problems you can solve
3	Intent	Where they are in the buying journey

Size proxies that work better than asking budget

They imply budget without forcing a risky or dishonest answer.

- **Team size bands**
- **Monthly revenue bands**
- **Marketing headcount**
- **Operational scale indicators**

CHAPTER 4 · STEP 3

The video ad structure

The ad is the first filter. Its message should attract the right people and repel the wrong ones.

PART	ELEMENT	WHAT IT DOES
01	Identity callout	"If you are X..." — names the person you want and excludes everyone else
02	Problem	The pain and its sub-problems, in their language
03	Offer	One-sentence result — the outcome, not the activity
04	Benefits	What improves and why it matters
05	Proof	Credibility and case studies
06	Next step	Not a call — a low-barrier step aligned to the offer

Key principle: alignment

Your ad promise and your next step must match.

If the ad sells the offer, the next step deepens understanding of the same offer. If you sell a generic freebie, you attract freebie seekers.

What not to do: cold traffic straight to "book a call"

Cold ad → Long landing page → Calendar booking

PROBLEM	WHY IT FAILS
1	Too high a barrier for a stranger
2	Too few conversions for Meta to optimise on
3	Only reaches the tiny "ready now" segment

The gatekeeper and the Offer Lead event

A gatekeeper is a short form at the start of the funnel. No contact details required; low friction, high intent. It is used only to qualify and route traffic — and to decide who is allowed to train the algorithm.

STEP	HOW IT WORKS
1	Ad click goes to a short page with a form
2	The form filters for ICP and problem fit
3	Only qualified submissions are counted as conversions and reported to Meta

Gatekeeper form rules

RULE	RULE	DETAIL
1	Keep it short	One to three questions for a pure qualifier; four to six where the form also routes to an asset
2	Multiple choice only	Avoid yes/no traps and free text
3	No email, phone or booking required	Contact details come after qualification
4	Clear incentive to answer honestly	The asset or offer page is the reward
5	No navigation or exits	One path: answer, then route
6	Conditional logic	Classifies qualified versus not qualified. Everyone can receive the asset; only qualified users train the algorithm

What the gatekeeper qualifies for — and example questions

QUALIFIES	EXAMPLE QUESTION	ANSWER FORMAT
Role or seniority	What best describes your role?	Multiple choice
Problem fit with your offer	What is your primary problem?	Multiple choice
Intent / timing	When do you want to start solving this?	Multiple choice
Buying power (size proxy)	Which best describes your size?	Team size or revenue band
Optional context	What solution have you already tried?	Multiple choice

Each answer maps to pass or fail logic.

Conditional routing logic

✓ Pass route

- Answers meet criteria → access to the offer page
- Offer Lead event fires
- Booking option available

✕ Fail route

- Answers fail → redirect elsewhere
- Never fires training events
- Cannot access booking

The offer page and the key training event

Only qualified users reach the offer page. It contains the offer explanation and a booking option or calendar; reaching it represents high-intent interest.

STEP	OFFER LEAD — THE OPTIMISATION EVENT
01	Create a custom conversion called **Offer Lead**
02	Trigger it only when qualified users reach the offer page or calendar view — never on page load
03	Make it the optimisation event for the cold campaign

Why Offer Lead works: higher volume than booked calls, still strong buying intent, easier to reach thirty to fifty events per week — which lets the algorithm learn patterns faster.

Intent depth vs budget

EVENT	VERDICT
Clicks	Too shallow
Leads	Often too broad
Offer Lead	**Sits at the optimal middle ground**
Booked calls	Too rare

Depth should match budget capacity.

Campaign set-up

SETTING	VALUE
Objective	Conversions
Optimisation event	Offer Lead
Targeting	Broad targeting allowed — let the funnel logic do the filtering
Learning phase	Stability: do not change multiple variables while learning

HOW THE PIXEL ACTUALLY LEARNS

It does not learn from demographics. It learns from behaviour patterns — and you control which behaviours count as success. Filtering improves signal quality.

Next step asset and nurture

Step 5: deliver the next step offer immediately

Send an offer document or "how it works" asset the moment someone completes the gatekeeper.

PURPOSE	WHAT IT ACHIEVES
1	Reduces friction and confirms fit
2	Starts the nurture sequence
3	Sets expectations about process and outcomes

DO	DO NOT
Make it about the offer and the path to the outcome	Send a random lead magnet unrelated to the core offer
Include boundaries and who it is not for	

Watch out: weak assets create form fills without real momentum.

Step 6: nurture to build intent and trust

> **You cannot change who people are. You can change intent by increasing trust and excitement.**
>
> Nurture converts right-fit, low-intent prospects into ready-to-talk prospects.

Email nurture sequence blueprint

Seven to ten emails, daily or every second day. Value-based, not pushy sales.

EMAIL	TOPIC
1	Problem breakdown and sub-problems
2	How the approach works
3	Case studies
4	Your credibility story related to the problem
5	Market trends and timing
6	Mistakes to avoid
7	Call framing — what they get on the call

Retargeting nurture content categories

- Problem–solution videos
- Case study clips
- Differentiators and USP
- Biggest mistakes to avoid
- Behind the scenes: process and standards
- Call invitation framed as value: diagnosis, plan, ROI model

Campaigns, measurement and optimisation

Step 7: run two campaigns

CAMPAIGN	JOB	AUDIENCE
Cold	Attracts new people into the gatekeeper	Broad; optimised on Offer Lead
Warm	Retargets watchers and submitters with nurture content	People who watched 50% of the video or submitted the form

Separate budgets and measurement so learning is clear.

500

Minimum retargeting audience size

Retargeting works when the audience is large enough and high quality. Under-spending leads to false negatives — don't judge the warm campaign before the audience exists.

Step 8: measurement and optimisation order

Fix things in this order. A weak offer cannot be rescued by better creative.

ORDER	WHAT TO CHECK	QUESTION TO ASK
1	Offer clarity and proof	Is the outcome specific, measurable and evidenced?
2	Gatekeeper qualification accuracy	Are the right people passing and the wrong people failing?
3	Ad creative resonance	Does the identity callout stop the right scroll?
4	Nurture content movement to calls	Are qualified leads progressing to bookings?
5	Call conversion and close rate	Are booked calls showing up and buying?

Metrics that matter

METRIC	WHY IT MATTERS
Cost per qualified lead	The real cost of the funnel — not cost per lead
Qualified lead rate	Whether ad and gatekeeper are attracting the right people
Call booking rate from qualified leads	Whether nurture is building intent
Show-up rate	Whether intent is real by the time of the call
Sales-qualified rate and close rate	Whether the filters match who actually buys
Cost per acquisition, payback period, lifetime value	Whether the system is commercially sound

Do not optimise for cheap leads. Lead volume alone is meaningless.

Why this works with smaller budgets

- You generate enough weekly conversions for Meta to learn.
- The pixel trains on qualified behaviour only.
- Learning compounds over time.
- Performance improves without scaling spend.

CHAPTER 8

Failure points, do and do not, checklist

Common failure points

NO.	FAILURE POINT	WHAT IT CORRUPTS
1	Misalignment between ad and asset	Attracts the wrong people; form fills without momentum
2	Gatekeeper too long or too easy to game	Drop-off, or unqualified traffic leaking through
3	Reporting wrong conversions back to Meta	The algorithm learns the wrong pattern
4	Event firing on page load / direct access to offer page	Unqualified users train the pixel
5	Weak proof and no real case studies	Intent never develops
6	Pushing calls too early	Low show rate, low close rate
7	Retargeting too early with too small an audience	False negatives on the warm campaign
8	Inconsistent content volume and repetition	No mere-exposure effect
9	Slow sales follow-up after intent signals	Warm leads go cold

Do and do not summary

DO	DO NOT
One clear offer and one clear ICP	Lead with freebie messaging in the ad
Use a gatekeeper and report only qualified conversions	Send cold traffic to a calendar as the main path
Nurture before pushing calls	Ask budget directly in the first step
Separate cold and warm campaigns	Train Meta on unqualified conversions
Keep variables stable during the learning phase	Rely on interest stacks alone

Implementation checklist

ITEM	ACTION	CHECK
1	Offer statement written in one sentence	
2	ICP filters defined: identity, problem, intent	
3	Video ad script built to the six-part structure	
4	Gatekeeper form built with conditional logic	
5	Offer Lead conversion event tracked and reported correctly (qualified only, not on page load)	
6	Offer document or "how it works" asset created	
7	Email sequence written and loaded	
8	Retargeting creatives produced across content categories	
9	Cold and warm campaigns launched with separate budgets	
10	Weekly review of qualified metrics and pipeline impact	

DECISION POINT

You do not fix Meta targeting with targeting. You fix it with *signal design*.

The funnel trains the algorithm, not the interests. This system succeeds when you commit to it: the question is not whether Meta can work for a B2B agency. The question is whether you will train Meta with qualified data and build intent before the call.

More precise delivery

The pixel learns from qualified behaviour only, so it finds more of the right people.

Better sales conversations

Calls happen after trust and intent exist — higher show rate, higher close rate.

Lower wasted spend

Learning compounds; performance improves predictably without scaling budget.

Want us to build and run this funnel for your agency? Talk to the Munro Agency team.

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