Meta Advertising Audit: Ad Account and Funnel Inspection

What the account buys, what it should buy, and what stands in between.

Sample deliverable, identifying details redacted

Prepared for	[redacted]
Ad account	[redacted]
Review window	2 April to 1 October 2026 (183 days)
Spend in the window	$39,816.59
Tier	Inspection (ad account and funnel)
Prepared	October 2026

The account buys the cheapest lead it can find, and apart from a 3-day test in July, Meta has not been asked to find the leads that qualify. An instant form lead costs $2.63 and asks one yes-or-no question. Meta credits the form ads with First Call updates from Salesforce equal to 46% of those leads, and Converted updates equal to 0.7%. A completed website assessment costs $4.79 and asks for 13 answers first, but what happens to those leads afterwards never reaches Meta. Whether the account meets the $5 target per qualified lead can't be judged until Salesforce counts qualified leads by source. That count is the first change.

About this sample. This is an audit of a real ad account, anonymised for publication. The company's name, website and ad account, its campaign and ad names, its ad image, and its competitors' names and websites are blacked out or left out; the text calls the company "the company". Quotes long enough to search for are shown as descriptions in square brackets. Most other details that could be checked against public pages, ads or free tools are left out, described in general terms, rounded, or given as a limit that stays true, and the site's claims are counted rather than listed. A few are kept because they are findings: how long the website assessment is and what it asks first, its "you qualify for" message and $0.00 result, the site presenting its maximum as a minimum, Google's ratings for how fast the home and assessment pages load and how much they jump, and what the main ad's label and headline do. Every account figure is exactly as computed from the account, apart from a few dates given less precisely (when ads were launched, when the exclusion list was made, when old connections were last used); no finding in the diagnostic summary has been softened or removed, and some supporting detail about the company's offer and its competitors is given only in general terms.

All amounts are Canadian dollars, as the ad account reports them. Figures come from read-only access to the ad account's reporting, the live website, Meta's Ad Library and public pages, read on 19 October 2026.

Summary

$2.63
per instant form lead. The form asks one yes-or-no question before the contact details.

$4.79
per completed website assessment, after 13 answers over 3 steps.

46%
First Call updates per form lead, as far as Meta can see.

23%
First Call updates per form lead bought from 13 July to the pause on 27 July, against 61% from launch to 22 June.

The audit in one paragraph

Over the window the account spent $39,816.59: 47% on an instant form campaign and 53% on campaigns that send people to the website assessment. Both are set up to buy the cheapest completed form, not a qualified lead. The instant form is set to collect volume and asks only whether the person pays income tax, so it produces leads at $2.63, against $4.79 for a website assessment. Salesforce sends form leads' progress back to Meta, and those updates show First Calls falling behind leads: Meta has 244 First Call updates for the 1,068 form leads bought from 13 July to the pause on 27 July, 23%, against 61% from launch to 22 June. The website assessment asks far more qualifying questions, but once someone finishes it, nothing more about that lead reaches Meta: Salesforce sends updates for form leads only, and the site doesn't keep the code Meta adds to each ad click, which ties a lead to its ad. Meanwhile the assessment tells people they qualify before anyone has reviewed their case, its results screen shows $0.00 to anyone who has had their condition for more than 10 years, and the page jumps as it loads on phones.

5 key changes

1. **Count qualified leads by source, every week, in Salesforce**, and judge the $5 target on that count. Sections 2, 7 and 8.
2. **Rebuild the instant form to qualify**: Meta's "Higher intent" form type, which adds a review screen before submitting, with the condition, years and province questions the website asks, plus whether income tax was paid. Then have Meta optimise it for the Salesforce stage the company counts as qualified. Sections 2 and 14.
3. **Send website outcomes back to Meta**: store the code Meta adds to each ad click on each website lead in Salesforce, and send it back with the person's email and phone in the scrambled (hashed) form Meta can match. Have the website's server, not just the visitor's browser, tell Meta when an assessment is complete. Section 7.
4. **Buy only as many leads as the team can call within 1 working day**, and track the First Call rate weekly. Sections 2 and 6.
5. **Fix the results screen, the page jump and the claims**: the $0.00 result, the estimate table that stops at an old tax year, the jump on phones, the promise that someone qualifies before anyone has reviewed them, and the main ad's news label and maximum shown without "up to", and the site's pages that present that maximum as a minimum. Sections 10 to 13.

Where this leaves the account

The account is cheap to run and Meta finds people willing to fill in a form. The problem sits after the form: the cheaper lead is the least screened, First Calls fell behind leads in July, and the website's leads tell Meta nothing once the assessment is done. None of that is fixed by spending more. It is fixed by measuring qualified leads by source, asking the instant form to qualify, buying only as many leads as the team can call, website leads included, and closing the loop from Salesforce back to Meta for website leads, as it already is for form leads. With that in place, the $5 target can be judged, and set, for each source.

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15	**Competitors** Who advertises, published fees, and positions nobody holds.	Review
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Each section is tagged with its tier. The Review tier covers the ad account (sections 1 to 10 and 15); the Inspection tier adds the website, the lead forms and the offer (sections 11 to 14).

REVIEW TIER

1 Scope and method

What was examined, how the numbers were produced, and what to keep in mind when reading them.

What was examined

- **The ad account**, with read-only access to its reporting: 183 days from 2 April to 1 October 2026, 4 campaigns, 8 ad sets and 19 ads with spend, by day, month, age, placement, device and province. The same months of 2025 and 2024 for comparison, and monthly spend as far back as Meta still reports it, which starts in September 2023.
- **The change log** of campaigns and ad sets in the window, for budget, status and targeting changes. We did not look at who made each change.
- **Meta's event data**: what Meta's tracking code on the website (the pixel) and Salesforce report back to Meta, for the 27 days to 19 October 2026, and the lead form library and its connections.
- **The website**: the home page and the free assessment, read live, including the assessment's own code and the tag rules that tell Meta an assessment is complete. Speed was measured with Google PageSpeed Insights, 3 runs per page and device.
- **The instant form** the ads used from May, read in the form library preview.
- **The market**: 8 searches of Meta's Ad Library for ads active in Canada, and the fee and offer pages of 4 competitors.

How figures are stated

- **Cost per lead** is spend divided by leads. A **form lead** is a submitted instant form. A **completed assessment** is the website event Meta calls CompleteRegistration, which fires when someone reaches the results screen after the third step.
- **Qualified lead** is the company's term. The company hasn't yet said which Salesforce stage it means, so this report shows the cost of each stage Meta can see.
- **Salesforce stages** (Lead, First Call, Unqualified Lead, Converted Lead) are updates Salesforce sends to Meta about each form lead. Meta credits them to the campaign that produced the lead and reports them on the date of the ad impression behind the lead, not the date of the call. They are Meta's counts, not a Salesforce report.
- **CPM** is the cost of 1,000 impressions. **Link CTR** is link clicks divided by impressions.
- Every figure was calculated from the exported data in code and checked against the totals (appendix A). Amounts are shown to the cent, or to the dollar where cents add nothing, and shares to the nearest whole per cent unless shown with a decimal. Terms used are explained at the end of the appendix.

What to bear in mind

- **Lead quality by source lives in Salesforce.** Meta sees Salesforce stages for form leads only, so this report compares the sources on what Meta can see and says what a Salesforce report by source will settle (section 2).
- **The two sources are counted on different terms.** The form ad sets credit a lead to an ad only within 1 day of the click; the website ad sets allow 7 days after a click or 1 day after a view. Section 7 explains what that does to the comparison.

REVIEW TIER

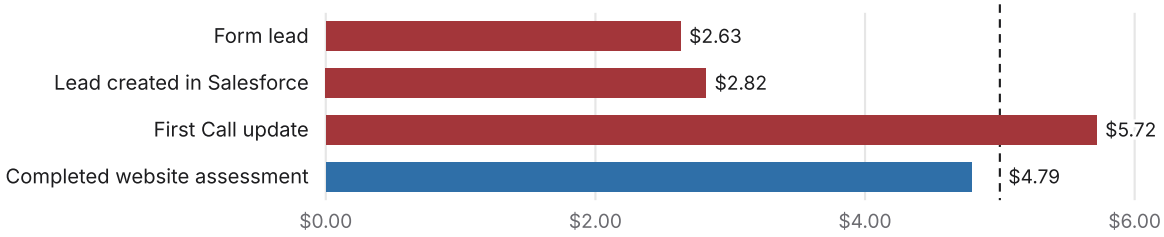
2 Primary finding: the account buys the form fill, not the qualified lead

Both sources are set up to buy the cheapest completed form. The cheaper source asks one question, which states the answer it wants. First Calls fell behind leads in July. The source with more questions can't tell Meta which of its leads were good.

The two sources side by side

	Instant form	Website assessment
Spend	$18,835.79	$20,980.80
Share of spend	47%	53%
Link CTR	2.72%	2.04%
Cost per link click	$0.52	$0.84
Leads or completed assessments	7,157	4,379
Cost per lead or assessment	$2.63	$4.79
Answers asked before the lead counts	5	13
Answers about the person's situation	1	8
What Meta is told to find	Leads	Completed assessments
Salesforce stages visible to Meta	Yes	No

The instant form asks one question, *[A line saying people are eligible only if they pay income tax, then asking whether they are eligible]*, and then the name, email and phone number Meta fills in for the person. The website asks for contact details and then the condition, how long the person has had it, the province, how it affects them and how much, their main source of income, their household income, and whether they are applying for someone else. A completed assessment costs 1.8 times as much as a form lead, and the company reports that website leads convert better, which is what the difference in questions would predict.



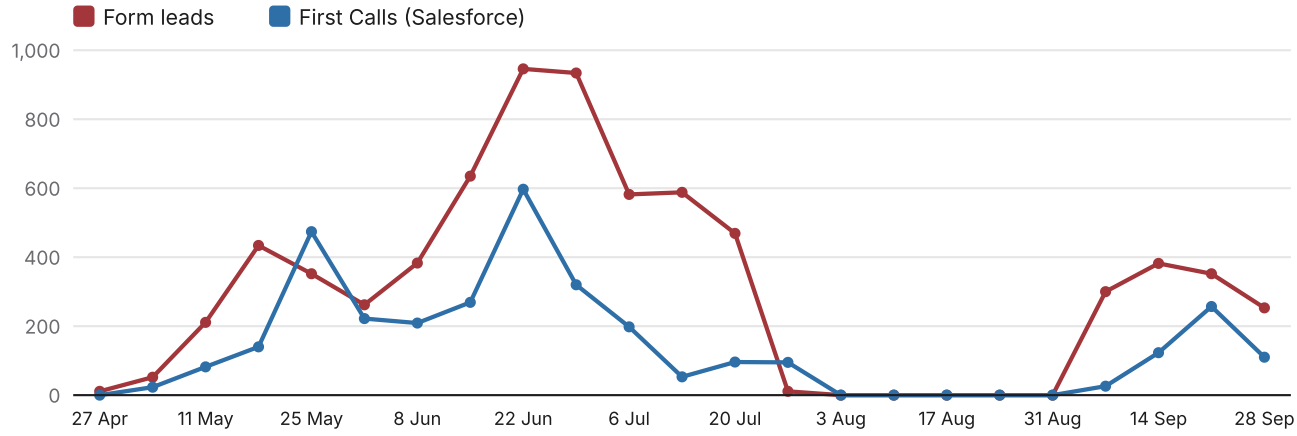
What each step costs. Form figures use the Salesforce updates Meta credits to the form campaign. The dashed line is the $5 target. A Converted Lead costs $384, off this scale.

What happened to the form leads

Salesforce stage credited to the form campaign	Events	Per form lead	Form spend per event
Form lead (Meta)	7,157		$2.63
Lead created in Salesforce	6,678	93.3%	$2.82
First Call	3,294	46.0%	$5.72
Unqualified Lead	902	12.6%	$20.88
Converted Lead	49	0.7%	$384.40

If "qualified" means a lead that reaches Salesforce, the form meets the target at $2.82. If it means a lead the team got on the phone, it misses: $5.72 per First Call update, and more per lead reached. If it means a converted lead, each Converted update cost $384. For the form to reach $5 per qualified lead, 53% of its leads would have to qualify. For the website, 96% of completed assessments would have to qualify, because each one already costs $4.79.

First Calls stopped keeping pace with leads



Form leads and First Calls by week (weeks start on Monday). Meta reports each First Call on the date of the ad impression behind the lead, so each week's First Calls are credited to that week's form ads, counted up to 19 October. Weeks the form didn't run, such as August, have nothing to report.

Period (weeks start on Monday)	Weeks	Form leads	First Calls	First Calls per lead
Launch to 22 June	9	3,286	2,016	61%
29 June and 6 July	2	1,516	518	34%
13 July to the pause on 27 July	3	1,068	244	23%
Restart on 10 September to 1 October	4	1,287	516	40%
All weeks the form ran	**18**	**7,157**	**3,294**	**46%**

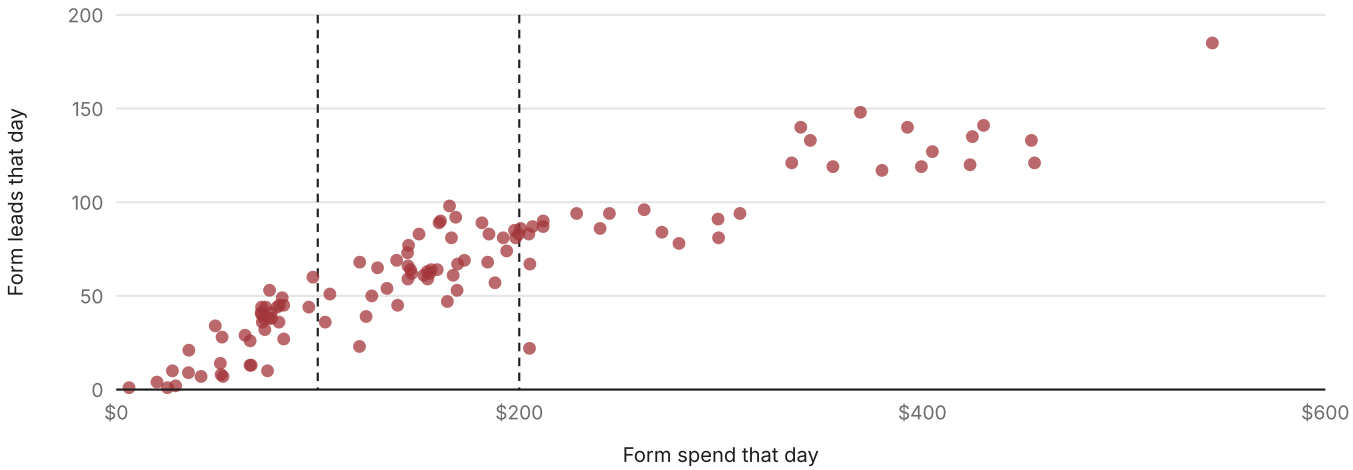
Every week the form ran is in one of these rows. From launch to 22 June, Meta has First Call updates equal to 61% of form leads, including the busiest week of the window (22 June: 946 leads, 63%). In the next 2 weeks that fell to 34%, and for the leads bought from 13 July to the pause on 27 July to 23%. These counts run to 19 October; if Meta credits late updates, even the last July leads have had 84 days. After the September restart the rate was 40%; the last of those leads had only 18 days to be called, so it may still rise. The first restart week, 7 September, had 26 on 300 leads, as low as the week of 13 July (53 on 588).

Meta can't show why. The July leads may not have been called, the calls may not have been logged as First Call, Salesforce may not have sent the stage for them, or the calls may have come too late to count: Meta doesn't say whether the form's 1-day click setting also applies to Salesforce updates, and if it does, a call logged more than a day after the click isn't counted here. The company can check all of this in Salesforce. Whatever the reason, the form kept buying leads until both running campaigns were switched off on 27 July, and its thank-you screen told each of those people that someone would be in touch shortly.

Each extra form lead cost more as daily spend rose

Form spend that day	Days	Spend a day	Leads a day	Cost per lead	Cost of each extra lead
Under $100	37	$62.69	27.89	$2.25	
$100 to $200	42	$156.75	66.79	$2.35	$2.42
$200 and over	31	$320.40	107.06	$2.99	$4.06

Every day the form campaign spent



Spend against leads, one dot a day. The dashed lines are the band edges in the daily-band table.

The cost of each extra lead is the change in spend a day divided by the change in leads a day, against the row above. Above $200 a day, each extra form lead cost $4.06. That is under the target only if more than 81% of the extra leads qualify. At the form's overall First Call rate of 46%, it comes to $8.83 per extra First Call update.

The one test that asked Meta for quality

One ad set in the form campaign was optimised for qualified leads, which uses the Salesforce stages to find people like those who progress. It was created on 24 July, 3 days before both running campaigns were switched off, and was paused when the form campaign came back on 10 September. It spent $156.48, 0.8% of the form budget, and produced 28 leads at $5.59. That is too little to judge it. Meta's own recommendations for the account estimate 24% lower cost per qualified lead from this setting. That is Meta's estimate, not a result, and it is the test this account never ran long enough to read.

How firm this is

- **The Salesforce stages are Meta's counts.** Meta only counts a stage it can match to a form lead from these ads. Salesforce itself may show more of each stage, and a different pattern; a Salesforce report settles it.
- **The weekly counts aren't one lead to one call.** In some weeks Meta reports more First Calls than leads, so a lead can carry more than one First Call update or be matched to another week's ad. Both ends of the comparison hold such a week: 25 May (474 First Calls on 352 leads) and 27 July (95 on 11). Without them the rates are 53% and 14%, so the drop is not overstated.
- **The daily bands are partly different months.** 26 of the 37 low-spend days were in May, and 27 of the 31 high-spend days in June and July. The rising cost of each extra lead fits what Meta does as a budget rises, but the bands don't prove cause.
- **The website's lead quality is the company's statement.** It is consistent with the questions the assessment asks, but it isn't measured here.

> **What settles it**
>
> One Salesforce report: every lead created from 2 April to 1 October 2026, with its source (instant form or website), the stage it reached and whether it qualified, without personal details. With it, the website's cost per qualified lead sits next to the form's, and the $5 target can be applied to each source.

REVIEW TIER

3 Diagnostic summary

Every finding, ranked by how much it costs or risks. The section numbers point to the evidence.

Rank	Finding	Section
CRITICAL	Both sources are set up to buy the cheapest completed form, not a qualified lead, and the target is judged on a count that doesn't exist yet.	2
CRITICAL	Salesforce sends Meta nothing about website leads, and the assessment doesn't keep the code Meta adds to each ad click. The source the company trusts more never tells Meta which of its leads were good.	7
HIGH	The instant form runs on Meta's "More volume" setting, built for the most submissions, with one yes-or-no question that states the answer it wants, so it is unlikely to screen out many before the lead is counted.	14
HIGH	First Call updates fell from 61% of form leads to 23% for the leads bought from 13 July to the pause on 27 July, and the form kept buying leads until both running campaigns were switched off.	2
HIGH	The results screen shows a zero refund to anyone who has had their condition for more than 10 years, and its estimate table stops at an old tax year.	12
HIGH	The main ad and the site make claims a regulator or Meta could object to: a news label, the maximum without "up to" or as a minimum, and "you qualify" before any review.	13
HIGH	Real visitors on phones see the assessment page jump as it loads, moving buttons under the thumb.	12
MEDIUM	Above $200 a day, each extra form lead cost $4.06, against $2.42 between $100 and $200.	2
MEDIUM	The qualified-lead test ran for 3 days before both running campaigns were switched off and wasn't resumed.	2
MEDIUM	The two sources count results on different terms (how long after a click or view a result is credited), which flatters the website's cost per assessment.	7
MEDIUM	Budgets changed often, and both running campaigns went dark for most of August; large changes and restarts put Meta back into its learning period.	4
MEDIUM	The form and website versions of one image took most of the spend; only one video ran.	10
MEDIUM	The website asks for name and phone before any question about the person's situation, while the ad promises a quick check of whether they qualify.	11
MEDIUM	The ad sells a quick check; on the website it is 13 answers over 3 steps.	10
MEDIUM	Past leads were only excluded from mid-September, with a list that needs regular refreshing.	9
MEDIUM	The home page is slower than Google's mark for real visitors on phones, and both pages are slow in the lab test of a weak connection.	12
MEDIUM	6 claims on the website and the results screen are out of date, inconsistent with each other, or stated as fact with no basis given.	13
MEDIUM	The completed-assessment event is sent from the browser only, with no event ID or customer details.	7
LOW	2 old lead form connections show errors alongside the live one.	7
LOW	On the assessment page, half the tap targets are smaller than a thumb needs, and the code is unoptimised and much larger than it needs to be.	12
LOW	No lookalike audience is built from clients who were approved and paid.	9
LOW	Audience Network spent a small amount at a click rate typical of accidental taps.	5
LOW	Meta estimates 20% lower cost per assessment from combining 4 similar ad sets.	4
LOW	The main ads don't use the no-fee-unless-approved promise, the strongest line the company has.	13

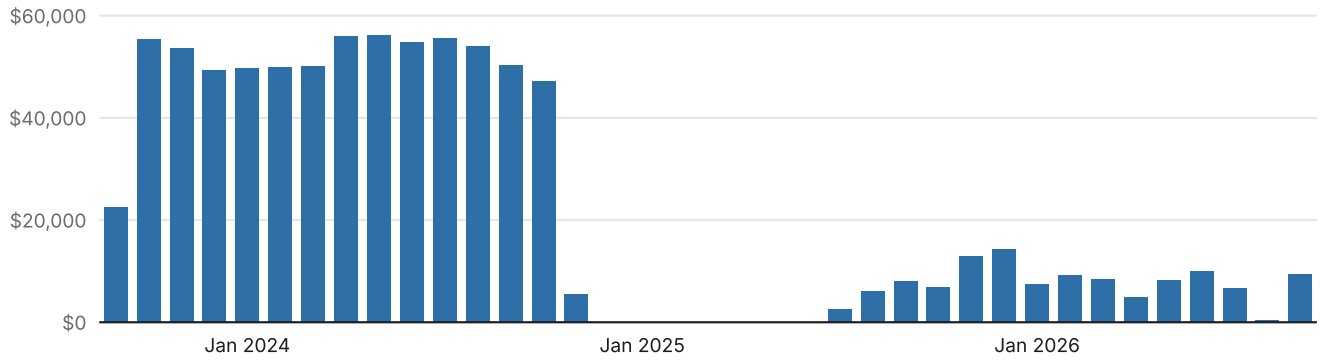
The 5 key changes

Change	Implemented when	Baseline	How the result is read
1. Count qualified leads by source in Salesforce, every week. Agree which stage counts as qualified, report it weekly for form and website leads, and judge the $5 target per source.	A weekly report shows qualified leads and cost per qualified lead for each source.	Not measurable today. Nearest proxy: 46% First Call updates per form lead, at $5.72 per First Call update.	Cost per qualified lead for each source, against the target, over 4-week periods.
2. Rebuild the instant form to qualify, then optimise it for the qualified stage. "Higher intent" form type with the website's condition, years and province questions, plus whether income tax was paid (section 14). The form campaign shows as paused on 19 October, so this starts by restarting it.	The new form is live at an equal budget to the current one.	$2.63 per form lead; 46% First Call updates and 0.7% Converted updates per form lead.	Qualified leads per dollar, not cost per lead. The new form's leads will cost more and should qualify more often; the test shows by how much.
3. Send website outcomes back to Meta. Store Meta's click code on each website lead, send it back with the hashed email and phone, confirm assessments from the website's server, and send the qualified stage (section 7).	Meta's event data shows the qualified stage for website leads, matched to ads.	No Salesforce stages for website leads reach Meta. Cost per completed assessment: $4.79.	Weekly qualified website leads in Meta against the Salesforce count; when they agree closely, the website ad sets can optimise for that stage.
4. Buy only as many leads as the team can call within 1 working day. Set the form budget from the team's call capacity, less the website leads it also calls, and track First Calls per form lead weekly (section 6).	An agreed weekly lead ceiling, and the First Call rate on the weekly report.	First Call updates per form lead: 61% from launch to 22 June; 23% from 13 July to the pause on 27 July; 40% after the restart.	The weekly First Call rate holds at the level agreed with the team while volume grows.
5. Fix the results screen, the page jump and the claims. The $0.00 result, the table that stops at an old tax year, the jump on phones, "you qualify for", the news label, and the maximum shown without "up to" or as a minimum (sections 10 to 13).	Phone checks 2 and 3 in section 12 pass, step 2 reads "you may be eligible for up to", no page or form presents the maximum as a minimum, and the new ad image is live.	Not measurable from Meta today. Salesforce holds the First Call and qualified rates for website leads.	First Call and qualified rates for website leads in the 4 weeks before and after the fix.

REVIEW TIER

4 Account health and history

A large account in 2023 and 2024, switched off for 7 months, and restarted in mid-2025 at a fraction of the spend.



Spend by month from September 2023, the earliest month Meta still reports (shown in part), to September 2026. The highest month was May 2024 at $56,109.

	2 Apr to 1 Oct 2026	Same months 2025	Same months 2024
Spend	$39,817	$16,925	$326,817
CPM	$15.49	$15.73	$12.47
Link CTR	2.39%	1.95%	0.92%
Cost per link click	$0.65	$0.81	$1.35
Form leads	7,157	1,629	32,121
Completed assessments	4,595	1,089	2,129
All spend per form lead	$5.56	$10.39	$10.17

The account spent nothing from December 2024 to June 2025, so the 2025 column only has spend from July. Completed assessments here are account totals, including those credited to the form campaign. "All spend per form lead" divides total spend by form leads, so it mixes in the website campaigns; it is shown only to compare years.

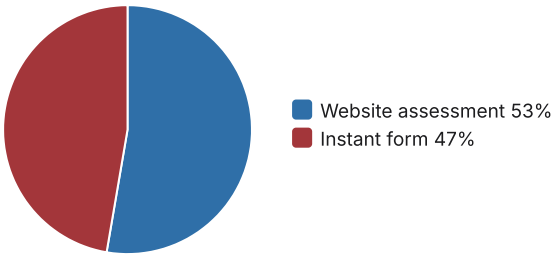
Against the same months of 2024, the account spends 12% as much, pays 24% more for 1,000 impressions, and gets a far higher click rate. People click; the question this audit keeps returning to is what happens after.

Structure and changes

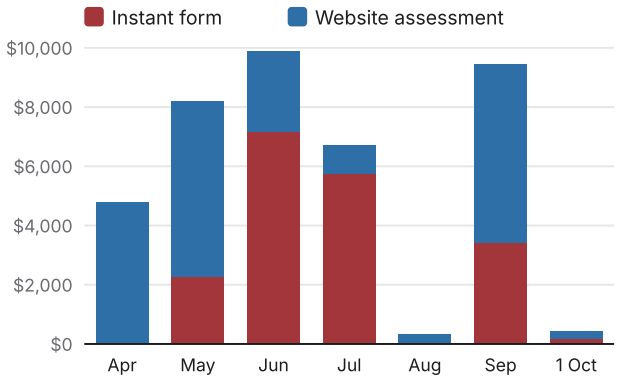
- **4 campaigns, 8 ad sets and 19 ads** spent in the window. Every ad set targets Canada outside Quebec, ages 35 and over, narrowed by interests, with Meta's option to show ads beyond those settings switched off. Meta's own recommendations estimate 20% lower cost per assessment from combining 4 similar ad sets.
- **The account was dark for 27 of the 183 days**, 23 of them in August, after both running campaigns were switched off on 27 July. The website campaign came back on 24 August and the form on 10 September. Each restart puts Meta back into its learning period, the stretch after a launch or a large change when it is still working out who to show the ads to and costs usually run higher.
- **Budgets changed 86 times on 35 days.** Large or frequent budget changes can restart Meta's learning; at this spend, 1 change a week per ad set is enough.
- **Past leads and clients were only excluded from mid-September**, when an exclusion list of 39,500 to 46,500 people was added to 5 ad sets. Before that, the ads could reach the same people again and count them as new leads.

REVIEW TIER

5 Where the spend went



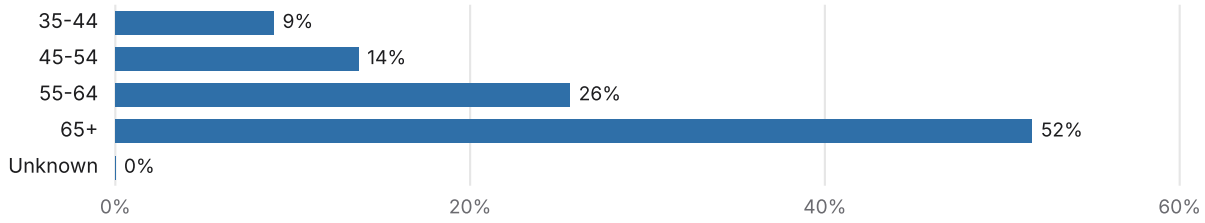
Spend by source.



Spend by month and source. The window starts on 2 April and ends on 1 October.

Campaign	Sends people to	Status 19 Oct	Spend	Share	Cost per result
[redacted] Instant form campaign	Instant form	Paused	$18,835.79	47.3%	$2.63
[redacted] Website campaign A	Website assessment	Active	$18,477.84	46.4%	$4.65
[redacted] Website campaign B	Website assessment	Paused	$1,934.49	4.9%	$5.08
[redacted] Website campaign C	Website assessment	Paused	$568.47	1.4%	$21.86

Campaign names are blacked out; the labels beside them are descriptions written for this sample. Results are form leads for the form campaign and completed assessments for the others.



Share of all spend by age.

- **People aged 65 and over** took 70% of form spend and 35% of website spend. That fits the conditions the ads feature, but a refund depends on tax having been paid, and some retirees pay little or none; it is one more reason to ask about income tax before the lead counts.
- **Facebook Feed** took 60% of spend. **Phones** took 83%, Android phones alone 46%, so the website has to work on a mid-range Android phone first (section 12).
- **Ontario** took 42%, then British Columbia 17% and Alberta 16%. Quebec is excluded in every ad set. Among the 8 provinces with at least $500 of form spend, the cost per form lead only ranges from $2.41 (Manitoba) to $2.71 (Ontario), so the province makes little difference to the cost of a form lead. Meta doesn't report website assessments by province.
- **Audience Network** (ads shown inside other companies' apps) spent $666.62 at a link CTR of 7.7%, a click rate typical of accidental taps.

REVIEW TIER

6 The funnel, step by step

From the ad to a qualified lead: where each source loses people, and where the account stops being able to see them.

Instant form

Step	Count	Of the step before
Impressions	1,344,978	
Link clicks	36,524	2.7%
Form leads	7,157	19.6%
Lead created in Salesforce	6,678	93.3%
First Call	3,294	46.0% of leads
Converted Lead	49	0.7% of leads

Website assessment

Step	Count	Of the step before
Impressions	1,225,322	
Link clicks	24,968	2.0%
Landing page views	19,892	79.7%
Completed assessments	4,379	22.0%
Lead created in Salesforce	Not visible	
First Call, Converted	Not visible	

The Salesforce rows are the updates Meta credits to the form campaign, divided by form leads. They compare totals over the window rather than following each lead through.

What the funnel shows

- **The two sources finish at a similar rate.** About one in five people who click the form ad submit it (20%), and about one in five who land on the website complete the assessment (22%), even though the website asks for 13 answers against the form's 5. People who give 13 answers have shown more intent. The form's single tax question lets through people who don't qualify: Meta counts 902 Unqualified Leads against 3,294 First Calls (27%). The question also tells people which answer makes them eligible, so few are likely to tap No.
- **One website click in five never becomes a recorded page view.** 80% of link clicks reach a loaded page. The rest left before the page loaded, clicked by accident, or weren't recorded because of ad blockers or privacy settings.
- **The biggest loss is after the lead.** Meta has First Call updates for no more than 46% of form leads, so at least 54% have none that Meta can see. Some will be people who didn't pick up; Salesforce can show how many were never tried.
- **The website funnel goes dark after the results screen.** The assessment sends the answers to the website's server at each step, so the company's records show which website leads progressed. Meta's don't (section 7).

> **Run the account to the team's call capacity**
> Ask the team how many new leads it can call within 1 working day, set the form budget so that form leads plus website leads stay within that, and track First Calls per form lead every week. If the rate drops below the level agreed with the team, cut the form budget before buying more leads.

REVIEW TIER

7 Measurement and tracking

The form's Salesforce updates reach Meta. Nothing tells Meta what happens to website leads after the assessment, and the website is the source the company trusts more.

What Meta receives

Signal	How it arrives	27 days to 19 Oct	Comment
Page views	Visitor's browser	18,833	No server copy.
Completed assessment	Visitor's browser, on the results screen	2,711	No server copy (0 events), so ad blockers lose some.
Lead	Salesforce	695	Form leads only.
First Call	Salesforce	1,074	
Unqualified Lead	Salesforce	315	
Converted Lead	Salesforce	15	

All events Meta received in the 27 days to 19 October 2026, from any visitor or lead: page views and assessments include visitors who didn't come from an ad, and First Calls include calls on leads from earlier weeks. They show how signals arrive, not what the ads produced.

Findings

- **Nothing about website leads goes back to Meta.** Salesforce sends stages for form leads only. And when someone submits the assessment, the site passes UTM tags (labels in the ad's link) and other ad platforms' click IDs on with the lead. It doesn't pass fbclid, the code Meta adds to each ad click. So Meta can only learn from the results screen, which everyone who finishes reaches.
- **The completed-assessment event comes from the visitor's browser only.** It is a one-line tag in Google Tag Manager that sends no event ID (the label that lets Meta merge a browser and a server copy of one event) and no customer details, and Meta shows no match-quality score for it.
- **The lead form's connections need a tidy-up.** Zapier is connected and last pushed a lead on 5 October 2026; the form's 2 older direct connections, to Salesforce and to LeadsBridge, show an error and were last connected years ago; if Zapier is how leads now reach Salesforce, they can be removed.
- **The two sources count results on different terms.** Form ad sets credit a lead to an ad only within 1 day of a click. Website ad sets credit an assessment within 7 days of a click or 1 day of a view, and one also counts engaged video views. Some website assessments are credited to people who only saw an ad, which flatters the website's cost per assessment. When the website ad sets move to the qualified stage, count both sources on clicks only.

Close the website loop

1. Read fbclid from the page address when the assessment is submitted, and store it with the click time on the Salesforce lead.
2. Send the completed assessment from the website's server too, with the same event ID on both copies and the person's email and phone, hashed.
3. Have Salesforce send the qualified stage for website leads to Meta with the stored fbclid and hashed contact details, as it does for form leads.
4. Once Meta gets a steady flow of qualified website leads (Meta's guidance is 50 a week per ad set), optimise the website ad sets for that stage.

REVIEW TIER

8 What a qualified lead is worth

$5 is low next to the fee the company earns from one paying client. The risk is not the $5; it is paying it for leads that never sign.

The company charges a contingency fee, a share of each refund. At the fees this market charges (section 13), a refund of $5,000 brings in more than $1,000, enough for more than 200 qualified leads at $5 each.

Even 100 qualified leads per paying client, $500 of ads, cost less than half that fee. Meta counts 49 Converted updates from the form, at $384.40 each. If "Converted" means a signed client with a refund of $5,000 or more, that cost is well under the fee, which would be affordable. Whether it is depends on what Converted means in Salesforce and how many converted clients are approved and paid, and neither is visible from Meta.

What the company needs to supply

- The definition of a qualified lead in Salesforce, and how the $5 target was set.
- From the qualified leads of a past period: how many signed, how many were approved, and the average fee collected.
- The same, split by instant form and website.

With these, the target can be set from the value of a lead, and it can differ by source.

REVIEW TIER

9 Retargeting and past leads

The account holds tens of thousands of past leads and uses them only to exclude people, and only since September.

Audience	Created	Size Meta reports	Used in the window
Exclusion list, September 2026	Sep 2026	39,500 to 46,500	Excluded from 5 ad sets from mid-September
All leads (file upload)	12 Jul 2024	50,000 to 58,800	No
Existing clients (file upload, 2 copies)	29 Aug 2025	1,000	No

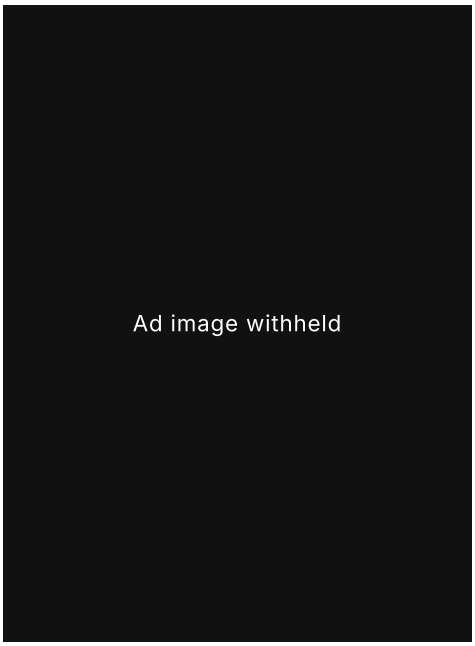
The account holds 117 audiences, 87 of them lookalikes, and Meta marks 15 as active. Meta reports 1,000 as the size of any audience below that, so the client lists may be smaller. A live audience of recent website visitors also exists and is unused.

- **Keep the exclusion list current.** It was created in mid-September. New leads arrive every week, and anyone not on the list can be bought again as a new lead. Refresh it monthly from Salesforce, or connect Salesforce so it updates itself.
- **Build a lookalike from paying clients.** The account's 87 lookalikes date from 2020 to 2023, are all inactive, and none is built from clients. Seed one from clients who were approved and paid, which points Meta at people like them. If there are fewer than a few hundred, add converted leads from Salesforce.
- **Don't retarget people who started the assessment.** It is tempting, but many of those people will have seen an estimate and a call promise already. Calling them is cheaper than buying them again. Retargeting belongs only to people who visited without starting, with a different message.

REVIEW TIER

10 Creative

One image does most of the work, and its headline leads with the maximum, without "up to".



The image used by the largest form ad and the largest website ad, withheld in this sample.

- **The same image ran on both sources.** The 2 largest ads, the form and website versions of it, took 63% of all spend.
- **The headline sets the wrong expectation.** It leads with the company's advertised maximum refund, shown without "up to"; the site's own estimate never comes near it (section 11). Someone who arrives expecting the headline figure and hears a fraction of it on the call is harder to sign.
- **A label makes the ad look like a news story.** It isn't one. Canada's Competition Act looks at the overall impression an ad gives, and Meta's advertising standards don't allow misleading content; a news label on a paid offer is the kind of detail a complaint would point to (section 13).
- **The check is sold as quick.** The image and the ad's text say so. That is true of the form. On the website it is 13 answers over 3 steps.

Ads with the most spend

Ad	Source	New	Spend	Share	Results	Cost per result	Link CTR	Frequency
[redacted] Main image A, second ad	Form	Yes	$16,919	42.5%	6,773	$2.50	2.7%	3.6
[redacted] Main image A	Website	No	$8,034	20.2%	1,836	$4.38	2.0%	2.8
[redacted] Main image B	Website	No	$3,818	9.6%	788	$4.85	1.7%	2.8
[redacted] Video	Website	Yes	$3,595	9.0%	755	$4.76	2.5%	2.3
[redacted] Image C	Website	Yes	$3,031	7.6%	593	$5.11	2.1%	2.4
[redacted] Image D	Website	No	$1,931	4.9%	381	$5.07	1.6%	2.3
[redacted] Main image A, first ad	Form	Yes	$1,213	3.0%	175	$6.93	2.6%	1.7
[redacted] Main image B, second ad	Form	Yes	$353	0.9%	141	$2.51	2.9%	1.4

Ad names are blacked out; the labels are descriptions written for this sample. Main image A and B are 2 versions of the main image; a second ad is a later form ad with the same image as a first one, in the same ad set. New means the ad was launched in the review window. Results are form leads for form ads and completed assessments for website ads, so form and website costs per result aren't comparable with each other. Frequency is the average number of times each person reached saw the ad.

The account ran one video ad in the window ("Video" in the table), with 9% of spend. Meta ranks each ad against ads competing for the same people on quality, engagement and conversion rate. Of the website ads Meta assessed, the video is the only one with enough data for a ranking: average for quality, above average for engagement and for conversion rate. More videos, with a typical refund figure rather than the maximum, are a cheap creative test.

INSPECTION TIER

11 From the ad to the page

The ad promises a quick check of whether someone qualifies. The website asks for their name and phone number first.

What the ad promises	What the person meets next
A free, quick check	**Instant form:** one question and pre-filled contact details, so the promise holds. **Website:** 13 answers over 3 steps, starting with contact details.
A check of whether the person can get a refund	**Website:** once the condition, years and province are chosen, step 2 shows *[A line saying that, on the answers so far, the person qualifies for]* followed by an amount, before anyone has looked at the person's taxes or doctor.
The advertised maximum refund, without "up to"	**Results screen:** an estimate from the site's own table that is under half the advertised maximum for every answer, and the same amount for several different answers (section 12).

We couldn't see which page the website ads link to: they use dynamic creative (ads Meta assembles from several images and texts), which doesn't show the link through read-only access. Their copy points to the free assessment, which is the page reviewed here. The team should confirm the ads link straight to the assessment rather than to the home page, which runs to more than 7 phone screens.

What to change

- **Put the qualifying questions before the contact details.** Someone who clicked to find out whether they qualify expects to be asked about their situation first. The current order does keep a phone number from people who stop after step 1, because each step is saved as it is completed; whether those partial leads are worth calling is a Salesforce question. Test the order rather than switch outright (section 14).
- **Replace "you qualify for" with "you may be eligible for up to".** The step 2 message states eligibility as a fact. The CRA decides eligibility after a medical practitioner certifies the form; the page can't know it yet.
- **Make the ad's number and the page's number the same kind of number.** If the ad leads with the maximum, it should say "up to", no page or form should present it as a minimum, and the page should give the typical range next to the estimate.

INSPECTION TIER

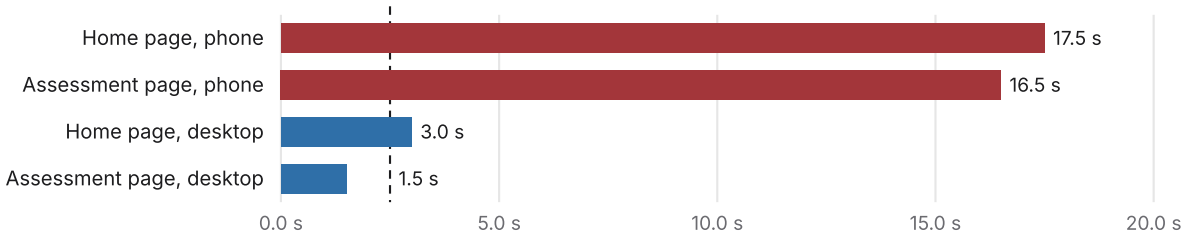
12 The website on a phone

For real visitors the assessment page shows its content at about Google's mark. What goes wrong is that it jumps as it loads, and the results screen has 2 bugs.

Measure	Home page	Assessment page	Google's "good"
Time until the main content shows, real visitors on phones	Needs improvement	At the mark	2.5 s
How much the page jumps as it loads, real visitors on phones	Good	Poor	0.1
Time until the main content shows, lab test of a slow phone connection	17.5 s	16.5 s	2.5 s
How much the page jumps, lab test on desktop	Good	Poor	0.1

Google rates each measure good, needs improvement or poor; real-visitor ratings go by three in four visits. This sample gives Google's rating (or "at the mark" where a value sits on Google's line), and lab times to the nearest half second, instead of the exact measurements.

- **Real visitors on phones see the assessment jump.** Google rates it poor, the worst of its 3 ratings. On a form, a jump moves the button or the answer someone is about to tap. The phone lab test doesn't reproduce it, but the desktop lab test does. It likely comes from something only the assessment page loads late, such as the step animation or a banner.
- **The home page is slower than the assessment.** On phones, Google rates real visits to the home page "needs improvement" for how soon the main content shows; the assessment is at about the mark. In the lab test of a slow connection both pages take far longer, which matters for visitors on weaker mobile data.
- **The page carries a lot.** The assessment page loads dozens of script files, many of them from other companies. The assessment's own code is an unoptimised build meant for developers, usually several times larger than the finished build of the same code.
- **Half the tap targets are small.** On a phone 390 pixels wide, half of the page's tap targets are under 44 pixels in height or width, the usual minimum for a thumb. The first form field is visible without scrolling, which is good.



Time until the main content shows in Google PageSpeed Insights' lab test, median of 3 runs per page and device on 19 October 2026, rounded to the nearest half second. The phone test simulates a mid-range phone on a slow mobile connection, so it reads slower than real visits; the dashed line is Google's "good" mark.

2 bugs on the results screen

- **Anyone who answers "More than 10 years" is shown $0.00.** The estimate table has no row for it, the estimate comes back empty, and the screen prints it as a dollar amount: $0.00, as the most the person could get. These are people who can claim the full 10 years back, shown nothing when their claim may be largest.
- **The estimate table has no rows for the last few tax years.** So the shortest answers to the years question all land on its most recent year and show the same amount, and recent tax years are missing from every estimate.

Both were found by running the site's own estimate code. Both look small to fix.

3 checks for the team, on real phones

1. Open a live website ad on an Android phone over mobile data, tap through, and time how long until the first field can be typed in. Over 2.5 s is slow.
2. Complete the assessment once with "More than 10 years" and once with "1", and check the amounts shown on step 2 and on the results screen.
3. Watch the page for a jump while it loads, especially near the buttons, with any pop-up both open and closed.

INSPECTION TIER

13 The offer and the claims around it

The offer is competitive and its no-fee-unless-approved promise is real. Several claims around it are stale, inconsistent or stated as fact without support.

The company charges a share of the refund, nothing up front and nothing if the claim isn't approved. Its fee is typical for the market: the competitors that publish one charge from about a quarter to about a third of the refund (section 15). The no-fee-unless-approved promise is the strongest line the company has, and the main ads don't use it.

Claims to fix

Where	What it says	Why it matters
Ad image	A label that makes the ad look like news, and a headline that leads with the advertised maximum	A news label on an ad, and a maximum shown without "up to".
Assessment, step 2	"you qualify for" an amount	Eligibility stated before any review. The CRA decides it.
Website and results screen	7 more claims that are inconsistent with each other, out of date, or stated as fact with no basis given	Each needs a source, an update or removal. The full list went to the company; the claims are only counted here because they would identify it.

Exposure

- **Canada's Competition Act** judges an ad by its general impression as well as its literal words. A paid ad that looks like news, a maximum shown without "up to" or as a minimum, or "you qualify" before any review are the kinds of impression it looks at. Since 20 June 2025, private parties can also ask the Competition Tribunal for permission to bring deceptive-marketing cases, on public-interest grounds.
- **The Disability Tax Credit Promoters Restrictions Regulations** came into force on 15 November 2021 and would cap what firms like the company may charge at $100 for an eligibility request and $100 per tax year for a reassessment. A court injunction has suspended them pending litigation, and the CRA's page still describes them as suspended until further notice. If the suspension ends, the cap would apply to the company and its competitors alike.
- **Meta's advertising standards** don't allow misleading claims. The account's error list already includes 2 older ads disabled after a rejected review. Rejections cost delivery, and repeated ones can restrict the account.

This is a marketing audit, not legal advice. Anything in this box that matters to the business should go to a lawyer who knows Canadian advertising law.

INSPECTION TIER

14 The lead forms and what to test

The instant form is set up to be easy, and it is. The fix is to make it ask what the website already asks.

Instant form as it ran from May

- **Form type:** "More volume", Meta's setting for the most submissions. The alternative, "Higher intent", adds a review screen before submitting.
- **Questions:** one, *[A line saying people are eligible only if they pay income tax, then asking whether they are eligible]*, with a Yes or No answer.
- **Contact details:** first name, last name, email and phone, filled in by Meta from the person's profile.
- **Thank-you screen:** says someone will be in touch shortly, with a link to the website.

Website assessment

- **Step 1:** contact details.
- **Step 2:** condition, years with it, province, then the "you qualify for" estimate.
- **Step 3:** what the condition affects and how much, main income source, household income, and whether the person is applying for someone else.
- **Results screen:** the estimate, the call promise, and the completed-assessment event for Meta.
- Each step is saved to the website's server as it is completed, so partial leads are kept too.

3 tests and a fix, in order

	Change	How	Judged on
1	Test a qualifying instant form	New form, "Higher intent", with the website's step 2 questions plus whether the person or a supporting family member paid income tax in the years with the condition. A polite ending for people who clearly can't get a refund. Run it against the current form at equal budgets.	Qualified leads per dollar from Salesforce, not cost per lead. The new form's leads will cost more.
2	Test optimising for the qualified stage	Once the qualifying form produces a steady weekly flow of qualified leads, move it to Meta's qualified-lead goal, using the Salesforce stage the company names as qualified.	Cost per qualified lead over 4 weeks, after the learning period.
3	Test the question order on the website	Split-test the assessment: questions first and contact details last, against the current order.	Completed assessments per page view, and qualified leads per assessment.
4	Fix the results screen and reword step 2	Fix the 2 bugs, change "you qualify for" to "you may be eligible for up to", and show the typical range.	A fix for everyone, not a split test. Watch First Call and qualified rates for website leads before and after.

REVIEW TIER

15 Competitors

A crowded field with near-identical offers. One competitor runs far more ads than the company, and nobody yet holds the positions the company could own.

Active ads in the sample

Advertiser	Active ads
The largest advertiser	35
The other 10, the company included	42
Total, 11 advertisers	**77**

From 8 keyword searches of Meta's Ad Library for ads active in Canada on 19 October 2026. They returned 265 distinct ads from all advertisers, 77 of them from 11 disability-credit advertisers. Counts are what the searches returned, not full totals.

What competitors' pages show

- Fees, where given, from about a quarter to about a third of the refund.
- Every firm that shows an amount leads with a maximum, and none says what a typical claimant receives.

From the fee and offer pages of 4 competitors, read on 19 October 2026. Details of each competitor are left out of this sample.

Positions nobody holds

- **The typical number.** Competitors that show an amount lead with a maximum, and none of their pages read for this audit says what a typical claimant receives. Leading with a typical figure sets an expectation the call can meet.
- **A call-back promise kept.** Promising in the ads to call within a set time, and keeping it, is a position no competitor page read for this audit holds. It gives people a reason to choose the company.
- **Saying early who can't get a refund.** A refund needs income tax to have been paid, and the instant form already asks. Saying it in the ad turns those people away before they cost a lead.

Appendix

A. How the numbers reconcile

Check	Result
Form campaign plus website campaigns equals account spend	$18,835.79 + $20,980.80 = $39,816.59
Account spend minus the sum of ad-level spend	$0.00
Form leads summed by day equal the window total	7,157 = 7,157
First Call events summed by day equal the window total	3,294 = 3,294
Days in the daily bands equal days the form campaign spent	37 + 42 + 31 = 110
Account history: sum of ad-level spend minus account total	$0.01

Daily and monthly sums of spend were also checked against the window total in code, to the cent. Account-level completed assessments (4,595) include 216 that Meta credits to the form campaign, from people who clicked a form ad and also finished the website assessment; section figures for the website use the website campaigns only.

B. How results were classified

- **Instant form:** the instant form campaign (its name is withheld in this sample). Its result is Meta's lead count. Its 2 ad sets include the qualified-lead ad set.
- **Website assessment:** the other 3 campaigns. Their result is the CompleteRegistration event from the website ad sets, every one of which is optimised for it.
- **Salesforce stages:** the custom events "Lead", "First Call", "Unqualified Lead" and "Converted Lead (Salesforce)", read from Meta's conversions field for each campaign and day, as Meta reports them: on the date of the ad impression behind the lead.

C. Campaign switches in the window

Date	Campaign	Change
4 May 2026	[redacted] Website campaign C	Active to Inactive
15 May 2026	[redacted] Website campaign B	Active to Inactive
26 May 2026	[redacted] Website campaign A	Active to Inactive
1 Jun 2026	[redacted] Website campaign A	Inactive to Active
27 Jul 2026	[redacted] Website campaign A	Active to Inactive
27 Jul 2026	[redacted] Instant form campaign	Active to Inactive
24 Aug 2026	[redacted] Website campaign A	Inactive to Active
10 Sep 2026	[redacted] Instant form campaign	Inactive to Active

D. Attribution settings

Ad sets	Counts a result within
Instant form	1 day of a click
Website assessment	7 days of a click or 1 day of a view; one ad set also counts 1 day after an engaged video view

E. Sources

- **Meta Ads connector** (read-only access to the ad account's reporting), on 19 October 2026: campaign, ad set, ad and account figures by day, month and breakdown; the change log (read without the names of who made changes); Meta's event data and match quality; audiences; Meta's recommendations; Ad Library searches.
- **Meta Business Suite**, read-only: the instant form's preview and lead integrations. No leads were opened or downloaded.
- **The website**, read on 19 October 2026: the home page, the free assessment and its code, the tag rules in Google Tag Manager, the FAQ, the other pages about the offer and the privacy policy. Nothing was submitted.
- **Google PageSpeed Insights**, 3 runs for each page and device on 19 October 2026.
- **Competitors' own sites**: the fee and offer pages of 4 competitors, read on 19 October 2026 (names and addresses withheld in this sample).
- **Canada Revenue Agency**, questions and answers on the Disability Tax Credit Promoters Restrictions Regulations (canada.ca).
- **Osler**, on private access to the Competition Tribunal coming into force (osler.com).
- **Meta Business Help Center**, on how conversions are attributed: Ads Manager reports them on the date of the ad impression (facebook.com/business/help).

F. Terms used

Completed assessment	Someone reached the results screen of the website assessment; Meta records it as CompleteRegistration.
First Call	A Salesforce stage, sent to Meta, that the team logs when a first call with a lead happens. Its exact definition is the company's.
Qualified lead	The company's term, not yet defined for this audit. The target applies to it.
Attribution	Meta's rules for crediting a result to an ad: how long after a click or a view a lead or assessment still counts.
Optimisation goal	The result Meta's delivery tries to get more of for the money, such as leads, completed assessments or qualified leads.
fbclid	Meta's click ID, a code added to the page address when someone clicks an ad. Stored with a lead, it lets later Salesforce stages be matched to the ad.
UTM tags	Labels added to an ad's link that name the source, medium and campaign, so the website can record where a visitor came from.
Event ID	A label sent with an event so Meta can tell that a browser copy and a server copy are the same event and count it once.
Hashed	Scrambled one way before sending, so Meta can match an email or phone to a person without receiving it in readable form.
Match quality	Meta's rating of how well it can tie the events it receives to people on Facebook and Instagram.
Learning period	The stretch after a launch or a large change when Meta is still working out who to show an ad to; costs usually run higher.
Audience Network	Meta's ads shown inside other companies' apps.
How much a page jumps	Google's layout shift score: how much visible content moves while a page loads. Google's "good" mark is 0.1 or less.
Time until the main content shows	Google's largest contentful paint: how long until the biggest piece of content on screen appears.
Lookalike	An audience Meta builds of people similar to a list the advertiser provides.