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2026 EDITION

EXECUTION MANUAL

Ads that lead to WhatsApp

Meta Ads with AI for beginners: Instagram and Facebook campaigns that start conversations with customers, on a small budget and without wasting money.

WRITTEN BY

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The tools, prices and plans mentioned reflect the time of publication and may change. Always check the current terms on each tool's official website before signing up. Appendix D lists the official links.

This material is educational: it teaches work processes and the judgment to apply them. It does not guarantee sales, clients or financial results: those depend on execution, the market and each person's effort. It is not a substitute for professional legal, accounting or tax advice.

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INTRODUCTION

Before you start

Who this book is for, what you'll have when you finish, and the budget rule I ask you to follow from day one.

There are two ways to lose money with advertising. The first is not doing any and relying on someone finding you by chance. The second, much more common, is tapping “Boost” on a post without knowing what you want to achieve, with whom, or how you'll know if it worked.

This book teaches you a third way: simple Instagram and Facebook campaigns whose only goal is to get interested people to message you on WhatsApp. It isn't the only kind of advertising there is, but it's the most direct for small businesses and professionals who sell through conversation, and the easiest to measure: either they message you, or they don't.

Who it's for

For anyone who sells a service or a product and closes sales through chat: professionals, small brands, shops, freelancers and small agencies that want to offer this service to their clients. If you've never run an ad, you start from zero. If you've run a few and they didn't work, you'll probably find out why here.

What you'll have when you finish

- [ ] Clear criteria to know whether paying for ads makes sense today, or whether something else needs fixing first.

- [ ] Your ad account set up, connected to WhatsApp and protected.
- [ ] An offer and an audience defined for the ad.
- [ ] A test campaign built with the right objective.
- [ ] A method to decide the test budget without risking more than you can afford to lose.
- [ ] Creatives and copy made with AI's help, several of each to compare.
- [ ] A dashboard with the metrics that matter and a procedure to decide what to change.
- [ ] The advertising policies that block the most accounts, so you don't fall foul of them.

How it's organized

Part I is preparation: when yes and when no, the account and the offer. **Part II** is the campaign: structure, budget, creatives and copy. **Part III** is measuring, fixing, scaling and staying on the right side of the policies. At the end, four appendices: the launch checklist, the prompts, the dashboard and the sources.

The budget rule

I ask you to follow it from now on: **your first test budget must be money you can lose without it hurting you.** Not because you'll lose it, but because the first campaign is for learning how your audience responds, and learning costs money.

If that amount is very small today, that's fine: you start small and increase it once you have data. What doesn't make sense is putting in an amount that forces it to work the first time.

A note on scope

Meta often changes the names of menus, options and tools in its ads manager. This book explains the logic behind each decision and tells you where to check the up-to-date detail (appendix D). It also doesn't guarantee results: the cost and number of conversations depend on your industry, your offer, your area, the competition and the timing. What it does give you is a method to spend with judgment and learn from every cent invested.

> **BEFORE YOU TURN THE PAGE**
>
> Write down three numbers: how much a new customer is worth to you (what they leave you on average), how many new customers you could serve per month, and how much money you could invest in a test without worrying about losing it. You'll use them in chapters 1 and 5.

JUDGMENT

01

When yes and when no

Advertising amplifies what already exists. If the offer or the chat doesn't work, ads just make it fail faster and more expensively.

An ad doesn't turn a weak offer into a good one, or a messy chat into one that sells. What it does is bring you more people. If you sell to the people who already message you, an ad can multiply that. If you don't, it'll bring you more people you also won't sell to.

The four conditions

Before investing, check that these four are met:

- [ ] **You have a clear offer:** you can explain what you sell, to whom and how much it costs in a short message.
- [ ] **You've already sold without ads:** even a little, there are people who bought from you through referrals or social media. That shows the offer has demand.
- [ ] **Your chat is ready:** you reply quickly, know how to present the price and follow up. The book *Close Sales on WhatsApp* covers this in detail.
- [ ] **You can serve more customers:** if you're at your limit today, an ad will bring you inquiries you won't be able to take.

If one is missing, fix it first. It's cheaper than paying for ads to discover it was missing.

The math you need to be able to do

There's a simple relationship that decides whether an ad makes sense:

CONCEPT	WHAT IT IS
Customer value	What a new customer leaves you (on the first purchase or over time)
Cost per conversation	What it costs you to get one person to message you from the ad
Close rate	Out of every hundred people who message you, how many buy

With those three figures you calculate how much it costs you to get a customer with ads: **cost per conversation ÷ close rate**. If you pay X for each conversation and close one in ten, each customer costs you ten times X. If that's less than what a customer leaves you, the ad is profitable.

At first you won't know your cost per conversation or your close rate with ads: that's exactly what the test campaign is for. But you can know your customer value in advance, and with that you know the maximum you could pay.

> **AN EXAMPLE WITH MADE-UP NUMBERS**
>
> If a customer leaves you $500 and you close one in ten people who message you, you can pay up to $50 per conversation without losing money on the first sale (not counting your time). If the ad costs you $15 per conversation, there's margin. If it costs $80, there isn't, unless that customer buys again. The numbers are an example: yours come from your industry and from the test.

When not to

- [ ] When the product has never been sold and you don't know if anyone wants it.
- [ ] When the selling price is so low that no conversation can cost little enough for the math to work.
- [ ] When you can't answer messages the same day.
- [ ] When what you want is “followers” or “awareness”, without a concrete offer: that exists, but it's not what this book teaches.
- [ ] When your industry has advertising restrictions you don't know about (chapter 11).

Why WhatsApp as the destination

Some campaigns lead to a website, a form or a store. For businesses that sell through conversation, leading to the chat has three advantages: the person is one tap away from talking to you, you can diagnose and resolve doubts on the spot, and you measure something very concrete (how many conversations started and how many ended in a sale). The downside is that it forces you to attend to the chat. If you can't, choose another destination.

Three cases to practice

The three businesses are made up, and so are the numbers. What matters is the reasoning.

Luna Aesthetics, laser hair removal in a mid-sized city. It has clients through referrals, replies to chats the same day and has gaps in its schedule. Each new client does a treatment of several sessions. It meets the four conditions and the customer value is high: it's a good case for testing ads.

Mateo, private English tutor. His schedule is almost full through word of mouth. He meets three conditions, but not the fourth: he has no capacity.

The payment method and taxes

Depending on your country, ad charges may include taxes or bank surcharges, or local rules on foreign digital services. Find out beforehand, from your bank or your accountant, because the amount you see in the ads manager may not be the total you're charged.

If you work for clients

If you're going to manage other businesses' ads, the right way is for the ad account and payment method to belong to the client, and for them to give you access to their portfolio. That way the account and its history are theirs, they pay Meta directly and you bill for your service separately. Avoid paying for clients' ads with your own card.

REVIEW YOUR SETUP AI

I'm going to start running Instagram and Facebook ads that lead to WhatsApp. This is my situation: **which accounts you have: page, professional or personal Instagram, personal WhatsApp or Business, whether you already have an ad account, who has access**.

Give me an ordered list of steps to get everything connected and secure, marking what I should check in Meta's help center because it may have changed. Include a security checklist.

SHARING YOUR PASSWORD WITH WHOEVER RUNS YOUR ADS

It's the most common way to lose an account or be unable to recover it. If someone helps you, add them with their own user and just the right permission. If they leave, remove their access and that's it.