



Meta Ads *Playbook*

2026 **Facebook + Instagram ads**

The five strategies that work on Meta in 2026, **and how to run each one with Claude**, with every prompt written out and every number sourced.

5 strategies

11 Claude prompts

1 setup guide

1 live dashboard

18 pages

YOUR ADS RUN ACROSS

 Facebook

 Instagram

 Messenger

 WhatsApp

 Threads

*“Creative decides who you reach.
Data decides who acts.”*

THE IDEA BEHIND EVERY PAGE OF THIS PLAYBOOK

INSIDE THIS GUIDE

PAGE NUMBERS ON THE RIGHT

01	How Meta picks your ads	03	02	Build fewer, bigger campaigns	04
03	Concepts, not variations	05	04	Feed Meta clean data	06
05	Test by spending, scale by schedule	07	06	Measure what is real	08
07	Connect Claude to Meta	09	08	Ten prompts to paste	12
09	Make it fit your business	15	10	Your command centre in Claude	16
11	The one-page checklist	18			

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RUNS WITH
Claude

NEW TO META ADS? **Start on page 3 →**



BEFORE YOU BEGIN

Start *here*

Three ways to read this guide, what to have ready, and how every strategy page is laid out.

YOU WILL BE
ABLE TO

pick your starting page and have everything ready before you touch your ad account.

THREE WAYS IN

PICK THE ONE THAT FITS YOU

ROUTE A

New to Meta ads

Read pages 3 to 8 in order, then connect Claude on page 9.

ROUTE B

Already spending every month

Connect Claude, run prompt P01, then read the page it names.

ROUTE C

Here for the Claude setup

Connect on page 9, test on page 10, prompts on pages 12 to 14.

HAVE THESE READY

SETUP TAKES ABOUT AN HOUR

- ☐ **A Meta Business Portfolio** with full control of your ad account
- ☐ **The Meta Pixel on your website**, ideally with the Conversions API (page 6)
- ☐ **Your own numbers for 90 days**: spend, orders or leads, revenue

- ☐ **A Claude account**: free plans allow one custom connector (page 10)
- ☐ **One hour** for the connection and the three safety tests
- ☐ **What you sell**, your prices and your main customer groups

HOW EVERY STRATEGY PAGE WORKS

SAME ORDER, EVERY TIME

STEP 1

In plain words

What happens inside Meta.

STEP 2

Do this

The actions, in order.

STEP 3

Watch out

The common mistake.

STEP 4

Claude prompt

The prompt that runs it.

CONTENTS

SECTION · WHAT YOU GET · PAGE

#	SECTION	WHAT YOU GET	PAGE
01	How Meta picks your ads	The three stages every ad passes, and which one is failing	03
02	Build fewer, bigger campaigns	A structure that keeps Meta's automation on and learning	04
03	Concepts, not variations	Ads that reach new people, and which formats to make first	05
04	Feed Meta clean data	Pixel, Conversions API and the double-count test	06
05	Test by spending, scale by schedule	A weekly test routine and five safe ways to scale	07
06	Measure what is real	A five-number scorecard from your own sales	08
07	Connect Claude to Meta	Connect Claude read-only first, then test it	09
08	Ten prompts to paste	Ten long prompts: audits, briefs, reports, scaling	12
09	Make it fit your business	Changes for stores, local, lead gen and WhatsApp	15
10	Your command centre in Claude	A live dashboard of every number, built by Claude	16
11	The one-page checklist	Everything above on one printable page	18

Every number in this guide names its source. Where a popular claim has no source behind it, the guide says so instead of repeating it.

01

How Meta *picks* your ads

Three systems decide who sees your ad, always in the same order. The order tells you what to fix.

YOU WILL BE
ABLE TO

look at an ad that is not working, name which of the three stages is failing, and fix that stage first.

IN PLAIN WORDS

EVERY IMPRESSION PASSES THROUGH ALL THREE STAGES

STAGE 1 · ANDROMEDA

Retrieval

Is your ad even in the running?

Meta cuts tens of millions of ads to a few thousand for each person, based on what the ad is. Since July 2026 a generative model works here too.



STAGE 2 · GEM AND LATTICE

Ranking

Who is likely to act?

Models predict the chance a person clicks, buys or signs up. They learn from the conversions you send back.



STAGE 3 · AUCTION

Auction

Which ad wins the slot?

$\text{Bid} \times \text{estimated action rate} \times \text{ad quality}$.
The highest total value wins, not the highest bid.

Your bid, budget and cost goal only act at stage 3. If your ad is not picked at stage 1, it never reaches the auction, and more budget changes nothing. **A creative problem is a retrieval problem. A conversion-rate problem is a ranking problem.** Fix them at the right stage.

DO THIS

DIAGNOSE BY STAGE BEFORE YOU CHANGE ANYTHING

WHAT YOU SEE	STAGE	WHAT TO DO FIRST
Budget is there, but the ad set barely spends	Retrieval	Add a new concept: a different angle, person or format. More budget will not help.
Plenty of clicks, few sales or leads	Ranking	Check your conversion data (page 6) and your landing page before touching the ad.
Cost per result creeps up week after week	Retrieval and auction	Launch fresh concepts, then check frequency and the calendar: festive weeks cost more.
Every campaign drops on the same day	Platform-wide	Hold still for a week. Meta updates its models for every advertiser at once, and rebuilding now adds a learning reset on top.



Bid is the weakest lever

A bid change moves your score by half or double. Meta's estimate of whether a person will act can differ tenfold between a well-matched ad and a poor one. Put your effort into creative and data.



What is proven, and what is Meta's own account

The order of the stages is published and matches how large recommenders work. The details, and lift figures such as +15.7% Facebook conversions (Q2 2026), are Meta measuring Meta.



Creative decides who you reach. Data decides who acts.

Fix problems in that order: retrieval first, ranking second, auction last.

RUN IT WITH CLAUDE
PROMPT P01 · PAGE 12

Sources · Meta Engineering: Andromeda, 2 Dec 2024; GEM, 10 Nov 2025 · Meta earnings calls: Q1 2026 (Lattice and GEM), Q2 2026, 29 Jul (Meta Generative Recommender, first generative model in ads retrieval) · Ali et al., ACM CSCW 2019.

02

STRATEGY 1 OF 5

Build fewer, *bigger* campaigns

Meta learns from results. Every split you add divides those results, so each part learns slower.

YOU WILL BE
ABLE TO

set up an account that keeps Meta's automation on, learns fast, and still shows you results by audience.

IN PLAIN WORDS

ADVANTAGE+ IS A STATE, NOT A CAMPAIGN TYPE

Since early 2026 every new campaign starts with Meta's automation on. Advantage+ is no longer a type you choose: Meta treats a campaign as Advantage+ when three settings line up, and **one change can switch it off without a warning**.

CONDITION 1

Campaign budget on

Advantage+ campaign budget, or a campaign with a single ad set.

CONDITION 2

Broad audience

Advantage+ audience on, or targeting by location only.

CONDITION 3

Automatic placements

No exclusions at ad set level. Block placements at account level.

DO THIS

THE STARTING STRUCTURE FOR MOST ACCOUNTS

1

One campaign per goal

Sales for online orders, Leads for enquiries. All ad sets in a campaign must share one bid strategy and one optimisation goal, so a new goal needs a new campaign.

2

One ad set, with campaign budget

Meta states that a campaign with one ad set works the same as an ad set budget. You get a clear budget line and Advantage+ stays on.

3

Put fixed limits at account level

Location, minimum age and placement blocks set in Advertising Settings apply to every campaign without switching Advantage+ off.

4

Exclude customers when you want new ones

Custom audience exclusions are the one audience setting Meta always treats as a rule. Upload your customer list and exclude it.

5

Name every campaign the same way

Meta has no labels field, so the name is your only filter. Fixed fields, one separator:

2026-10_SALES_IN_BROAD_DIWALI .

6

Leave Advantage+ settings on unless you have a reason

Turning one off is allowed. Do it on purpose, note why, and compare after two weeks.

WATCH OUT

WHEN TO SPLIT, AND WHEN NOT TO

YOU WANT	DO THIS	WHY
A different goal or bid strategy	A new campaign	Meta allows one of each per campaign
Results by age, gender or region	Use Breakdowns in reporting	Meta's advice: split the report, not the delivery
A fixed budget for one product	One ad set per campaign, campaign budget	Works like an ad set budget and keeps Advantage+ on
A second ad account to keep delivery apart	Don't	Meta states auction overlap reaches across your ad accounts

!

A one-way door at 70 ad sets

Past 70 ad sets on Advantage+ campaign budget, a campaign can no longer change its bid strategy or turn campaign budget off. Stay well below 70.

!

Old shopping campaigns are locked

Since Marketing API v26.0 (29 Jul 2026), legacy Advantage+ shopping and app campaigns cannot be edited. Rebuild them as Advantage+ sales campaigns.

Sources • Meta Business Help Centre: Advantage+ campaign budget; auction overlap; breakdowns • Meta for Developers: Advantage+ campaigns; Marketing API v26.0 (29 Jul 2026) • Run it with Claude: prompt P02, page 12.

STRATEGY 2 OF 5

03

Concepts, *not* variations

Meta's first filter looks at what your ad is. Twenty versions of one idea look like one ad to it.

YOU WILL BE
ABLE TO

plan a batch of ads that reach different groups of people, and know which formats to make first.

IN PLAIN WORDS

A NEW IDEA REACHES NEW PEOPLE. A NEW COLOUR DOES NOT.

Andromeda matches ads to people by what the ad is: its idea, its format, the person on screen. Meta's own guidance says ads that look alike are treated as variations of one creative. **A new angle, a different person or a different format reaches a new group.** Meta also advises three or more formats.

CHANGE ONE OF THESE PER NEW AD	WHAT CHANGES	EXAMPLES
Angle	The reason to buy	A problem solved, a desire, proof, price, something new
Person	Who the ad speaks to	First-time buyer, gift buyer, a repeat customer
Format	How it looks	Reel 9:16, image 4:5, carousel, creator (partnership) ad
Hook	The first three seconds	A question, the result first, the price, a confession

WHAT THE DATA SAYS

MOTION • 550,000+ ADS • SEP 2025 TO JAN 2026

11.6%

Text-only ads

share that became winners

8.75%

Product image + text

share that became winners

7.56%

Creator-style (UGC)

share that became winners

4.57%

Animation

share that became winners

Motion counts an ad as a winner when it spends at least **10× the account's median ad**. The cheapest formats won most often, so **test ideas in cheap formats and spend on production only for the winners**.

\$

Spending under \$10,000 a month?

In the same data, accounts below \$10K a month produced close to zero winners from volume testing. At that size, run three to five strong, distinct concepts and refresh them every few weeks.

%

Judge video against your own account

Hook rate = 3-second plays ÷ impressions. **Hold rate** = plays at 75% ÷ 3-second plays. Compare new ads with your own last 90 days, not with internet benchmarks.

WATCH OUT

"Creative Similarity Score" and "Entity ID" thresholds quoted online (60%, 40%) trace to no Meta source and appear nowhere in Ads Manager.

Advantage+ **creative enhancements** are on by default for Sales, Leads and App campaigns. Meta can rewrite your text and add effects.

DO THIS

Write five concepts with the table above, **one change of angle, person or format each**.

Open each ad's creative enhancements. In health, finance or other regulated categories, **turn off text variations** and keep screenshots of what ran.

#

How many new ads a month do you need?

(Your target monthly spend ÷ the spend one winner absorbs before it tires) ÷ your hit rate. Take all three numbers from your own account, and plan production to match. Report cost per winner, not hit rate alone.

Sources • Motion, Meta ads creative benchmarks (Mar 2026) • Meta for Business: Demystifying creative diversification (16 Dec 2025); holiday creative guide (12 Aug 2026) • Meta Engineering, Andromeda • Run it with Claude: prompts P03 and P04.

04

STRATEGY 3 OF 5

Feed Meta *clean* data

Meta's ranking models learn from the sales you report back. Wrong data teaches them the wrong people.

YOU WILL BE
ABLE TO

set up tracking Meta can learn from, catch double counting, and choose an optimisation event you can reach every week.

IN PLAIN WORDS

TWO REPORTERS, ONE SALE

When a sale happens, the **Pixel** (in the shopper's browser) and the **Conversions API** (from your server) can both report it. Together they recover sales the browser alone misses. Set up without a shared ID, they count every sale twice, and Meta learns from a false picture.

DO THIS

THE BUILD ORDER

1

Treat the Pixel as your dataset

Your Pixel ID is now your Dataset ID. Web, app, offline and messaging events all land in it.

2

Add the Conversions API with a shared event_id

Send the same `event_id` from browser and server. Meta removes duplicates only when both arrive within 48 hours.

3

Clean customer details before hashing

Email trimmed and lowercase. Phone as digits with the country code (91 for India). Then SHA-256, as Meta's docs specify.

4

Check the score

Events Manager shows Event Match Quality. The Dataset Quality API reports event coverage against Meta's published goal of 75%.

5

Send purchase value

Value lets you use value-based bidding and value rules (up to 10 rules, from +1,000% to -90%) for your best customer groups.

2x

The double-count test

Compare Meta's purchase count with your own orders for one day. A ratio near 2.0 means browser and server events are not being matched.

i

What the Conversions API does not do

Reported gains of 15 to 30% after adding it are sales that were already happening and now get counted. Treat them as better measurement, not new revenue.

PICK AN EVENT YOU CAN REACH

THE 50-A-WEEK TEST

THE ARITHMETIC

Daily budget $\times 7 \div$ expected cost per event

Under about 50? Meta will likely flag the ad set Learning limited. Its own fixes, in order: combine ad sets, widen the audience, raise budget, or optimise for a more frequent event, such as add to cart instead of purchase.

WORKED EXAMPLE

Example: ₹3,000 a day

$₹3,000 \times 7 = ₹21,000$ a week. At ₹600 per purchase that is 35 purchases, under 50. Optimise for add to cart until volume grows, or combine ad sets.

W

Selling on WhatsApp? Save the click ID

Click-to-WhatsApp ads pass a `ctwaclid` in the first message. Store it, and send it back through the Conversions API when the sale closes, or Meta never learns which ads sold. For cash on delivery, report **OrderDelivered**.

Sources • Meta developer docs: deduplicate Pixel and server events; customer information parameters; Dataset Quality API; Conversions API for business messaging • Meta Business Help Centre: Learning limited • Run it with Claude: prompt P05, page 13.

05

STRATEGY 4 OF 5

Test by *spending*, scale by schedule

Most accounts cannot afford a true A/B test. Let spend pick the winners, then grow them safely.

YOU WILL BE
ABLE TO

run a weekly testing routine, read the learning phase correctly, and raise budgets without starting over.

IN PLAIN WORDS

SMALL TESTS CANNOT SEE SMALL DIFFERENCES

Worked from Motion's 2026 benchmark figures: **\$10,000 a month split across two test cells can only detect an ad that converts about 35% better**. Smaller real differences stay invisible. So judge ads by where Meta puts the money, at a cost per result you accept.

DO THIS

THE WEEKLY TEST ROUTINE

1 Launch new concepts once a week, in one batch

Each new ad counts as a significant edit, so batching keeps resets to one a week.

2 Wait at least 72 hours at equal budget

Then cut the ads Meta will not spend on, and keep the ones it funds at a cost you accept.

3 Give each winner three to five new hooks

Keep the rest of the ad the same, so you learn which opening works.

4 Track cost per winner

(Production cost + test spend) ÷ number of winners. It tells you whether to make more ads or better ones.

THE LEARNING PHASE, CORRECTLY

WHAT META SAYS, AND WHAT PEOPLE ADD

WHAT META SAYS

About 50 results in a week

Meta says an ad set usually leaves learning after about 50 results in the week after its last significant edit. It is guidance, not a rule you can check.

WHAT RESETS IT

Significant edits

Any change to targeting, creative or optimisation event; adding an ad; changing bid strategy; pausing 7+ days. Big budget or cost-goal changes may count.

**The "20% rule" is not Meta's**

Meta's page on significant edits contains no percentage. Its only example: \$100 to \$101 is fine, \$100 to \$1,000 may reset learning. Raising budgets about 20% at a time is a cautious habit, not a platform rule.

THE SCALING LADDER

TRY THESE IN ORDER

#	MOVE	HOW
1	Budget scheduling for peaks	Up to 8× the daily budget, each period at least 3 hours, reverts on its own. Meta says it does not restart learning: check the Delivery column to confirm.
2	Raise budget at the start of a day	Mid-day increases barely land, because budgets are spread across the day.
3	Loosen a cost or ROAS goal 5 to 10%	Only when budget goes unspent because the goal is too tight.
4	Combine ad sets	More events per ad set, less overlap, faster learning.
5	Check the ceilings	Meta's daily spending limit (Payment settings) and any ad set spending limits.

1 One change per campaign per week

Turn on the **Last significant edit** and **Optimisation events** columns. Never change a cost goal and the budget in the same week: you will not know which one moved the result.

Sources • Meta Business Help Centre: significant edits and learning phase; budget scheduling and high-demand periods (read 21 Jul 2026) • Motion 2026 benchmarks • Run it with Claude: prompts P06, P07 and P08, pages 13 and 14.

STRATEGY 5 OF 5

06

Measure what is *real*

Ads Manager reports what it can link to your ads, not what your ads caused. Check it against your own sales.

YOU WILL BE
ABLE TO

keep a weekly scorecard from your own numbers, and read Meta's reports without being misled by 2026 changes.

WHAT CHANGED IN 2026

MARK THESE DATES ON EVERY REPORT

DATE	CHANGE	WHAT TO DO
12 Jan 2026	7-day view and 28-day view windows removed. Left: 1-day, 7-day and 28-day click, 1-day engaged view, 1-day view.	Re-baseline any report that compares with 2025.
2025, updated 2026	Incremental attribution: counts only sales Meta's model says the ad caused.	Test it on part of the account; it removes window choice.
1 Jun 2026	Political and social-issue ads must disclose photorealistic AI people or events.	Log which tool made each creative.
29 Jul 2026	Marketing API v26.0: Instagram Explore feed placement and poll ads removed; old Advantage+ shopping campaigns locked.	Rebuild old campaigns; update any tool that uses the API.
15 Sep 2026	Creator Marketing Hub goes global; Instagram Live ads roll out from 29 Sep.	Add creator (partnership) ads to your concept mix.

DO THIS

THE WEEKLY SCORECARD • FIVE NUMBERS FROM YOUR OWN SYSTEMS

NUMBER	WHERE IT COMES FROM	WHY IT MATTERS
Total ad spend	Billing, including fees and taxes	The real cost
Orders or leads	Your store, CRM or sheet	Your source of truth
New customers	First-time buyers in your store	Growth, not repeat buyers
Cost per new customer	Total spend ÷ new customers	The number to manage
MER	Total revenue ÷ total ad spend	A health check across all channels

1

Turn on Audience Segments

Advertising Settings > Audience Segments splits results into new, engaged and existing customers. It needs your customer list and purchase audiences to work.

2

Pick one attribution window and keep it

Mixed windows across ad sets make account totals meaningless. Choose one, then hold it across the whole account.

WATCH OUT

A higher ROAS after launching broad campaigns can be **Meta finding your existing customers**, who buy at a far higher rate. Blended numbers hide it.

Meta's own lift figures for its tools are Meta measuring Meta.

ADVANCED MOVE

Prove lift with a holdout. Pause ads in a set of matched regions for three to four weeks and compare sales. Meta's open-source GeoLift package plans the test.

Run incremental attribution on a subset, keep the rest on a click window, and compare both with the holdout.

Sources • Meta attribution settings and Insights API changelog (Jan 2026) • Meta SIEP policy (1 Jun 2026) • Marketing API v26.0 (29 Jul 2026) • Meta for Business, creator news (15 Sep 2026) • Meta Q4 2025 call (incremental attribution) • GeoLift on GitHub • Prompt P09.

PART TWO · RUN IT WITH CLAUDE

07

Connect Claude to *Meta*

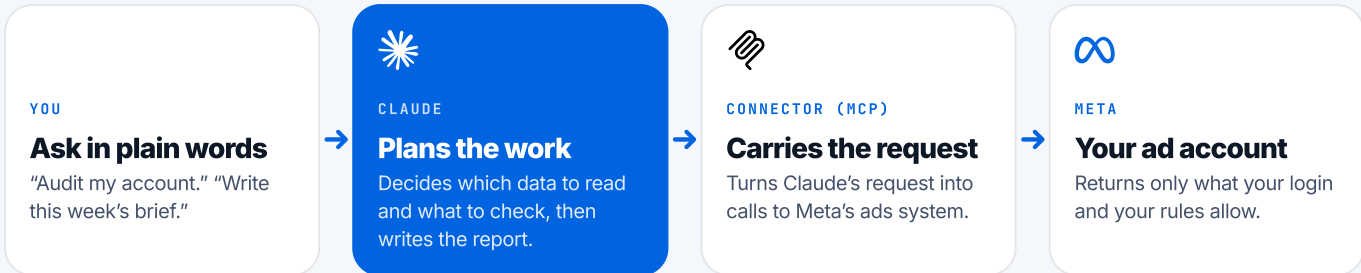
Claude reads your ad account through a connector. You stay the person who approves every change.

YOU WILL BE
ABLE TO

connect Claude to your ad account safely, starting read-only, and know what it can and cannot do.

IN PLAIN WORDS

HOW A REQUEST TRAVELS



MCP (Model Context Protocol) is an open standard that lets Claude use outside tools. A Meta Ads connector is an MCP server: you sign in to Meta through it, and it turns Claude's requests into calls to your ad account. Claude never sees your password.

CHOOSE A CONNECTOR

ALL THREE CHECKED ON 30 SEP 2026

**Meta ads MCP server**
Built by Meta. Address: `mcp.facebook.com/ads`. Sign in with Facebook; no developer app needed. Reads accounts, results, previews and the Ad Library. Can also create ads (always paused), edit them and switch them on.

OFFICIAL · META

**Windsor.ai**
Listed as Anthropic verified in Claude's connector directory, so it installs with one click. Sign-in by OAuth, a free tier for one data source, and Meta data next to 325+ other sources.

IN CLAUDE'S DIRECTORY

**GoMarble (Copilot plan)**
Hosted connector with OAuth sign-in. The Copilot plan is read-only by design, which suits teams that want reports and audits without any risk of changes. Paid plan.

READ-ONLY PLAN

PROOF THE ADDRESS IS META'S OWN

REAL SCREEN · DEVELOPERS.FACEBOOK.COM

Ads MCP Server

Updated: Jul 14, 2026

[Copy for LLM](#) [View as Markdown](#)

The ads MCP server is a Meta-hosted [Model Context Protocol](#) server that lets you manage Meta ads directly from an AI agent. It is one of [Meta's ads AI connectors](#) — a family of integrations that expose Meta business surfaces to third-party AI clients through structured, permission-scoped tools.

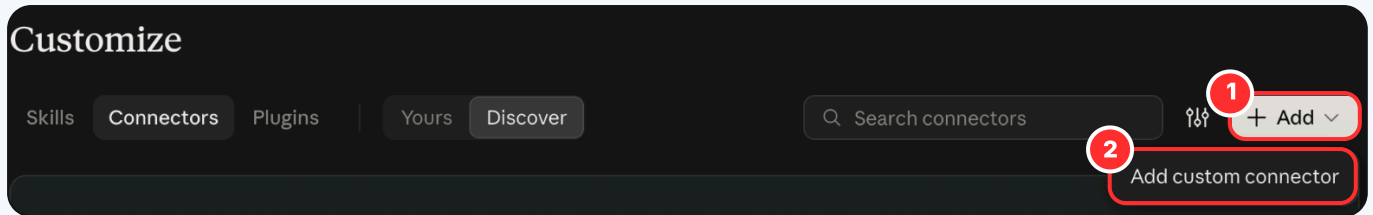
The server is remote-hosted at `https://mcp.facebook.com/ads` and works with any MCP-compatible AI agent.

Who it's for

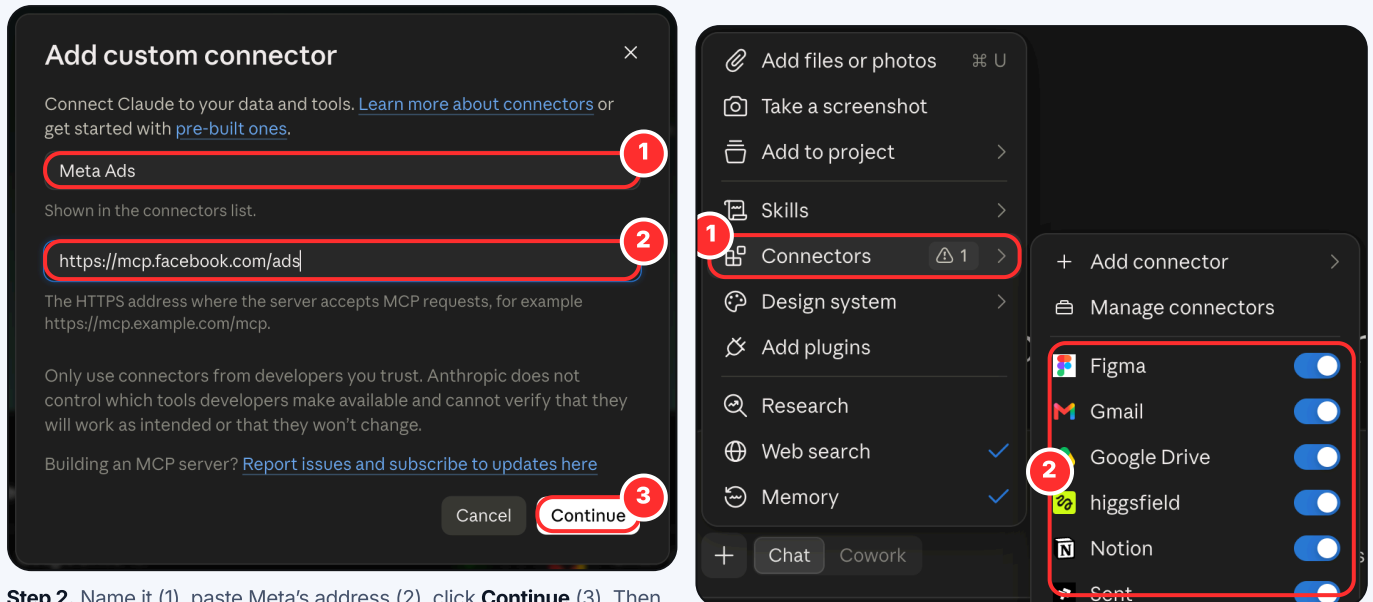
- Advertisers using AI assistants who want to manage Meta ads through a chat interface instead of Ads Manager or code
- Developers building AI-native ad workflows who want structured, permission-scoped access to ads capabilities without wiring up individual endpoints

LEVEL	WHAT CLAUDE CAN DO
Read only	See campaigns, ads, spend, results and the Ad Library. For P01 to P07, P09, P10.
Read and write	Also create paused ads, change budgets, switch ads on. Only P08, after your approval.
Never	Payment methods, user access, business settings.

Meta's documentation, updated 14 Jul 2026: **the server is remote-hosted at `mcp.facebook.com/ads`** and works with any MCP-compatible AI agent.



Step 1. Open **Customize > Connectors**, click **+ Add** (1), then **Add custom connector** (2). Real screen, claude.ai, 30 Sep 2026.



Step 2. Name it (1), paste Meta's address (2), click **Continue** (3). Then sign in on Meta's page and choose your ad accounts.

Step 3. In a chat, click **+ > Connectors** (1) and switch Meta Ads on in the list (2). Your list shows your own connectors.

IN CLAUDE CODE · META'S DOCUMENTED COMMAND, FOR TEAMS WITH THEIR OWN META APP

```
claude mcp add --transport http --client-id <META_APP_ID> meta-ads https://mcp.facebook.com/ads
# then, inside Claude Code: /mcp (sign in through the browser)
```

1

Read test

Ask: "List my ad accounts and each one's spend for the last 7 days." The numbers must match Ads Manager for the same dates.

2

Accuracy test

Pick one campaign and compare spend, results and cost per result with Ads Manager. Beyond small time-zone gaps, check the account and dates.

3

Safety test

With your rules set to block changes, ask Claude to pause one ad. It must be refused. If the ad pauses, fix the rules before you go further.

KEEP IT SAFE

SET THESE BEFORE THE FIRST REAL PROMPT

R**Set Meta's rules first**

In Meta Business Suite settings, the ads MCP server page lets a full-control admin block agent actions per ad account: creating ads, budget increases, targeting and creative changes, switching ads on, or every action. Meta lists rules as limited availability.

**Switching an ad on spends money**

Meta's own description of its activate tool: it "starts spending budget". Keep that action blocked by a rule, or allow it only for P08 after you approve.

SAVE YOUR RULES AS A SKILL

CLAUDE LOADS IT BY ITSELF WHEN THE TOPIC COMES UP

SKILL

meta-ads-operator / SKILL.md

SAVE AS A SKILL · PAGE 11

```
---
name: meta-ads-operator
description: Rules for working on our Meta ad account. Use for any Meta
  Ads audit, report, brief or change request.
---
# How to work on our Meta ads
- Default to READ ONLY. Only prompt P08 may change the account, and only
  after I approve a numbered change list in chat.
- Never touch payment methods, spending limits or user access.
- One change per campaign per week. Never change a cost goal and the
  budget in the same week.
- Label every figure READ (from the account) or ESTIMATE (inference).
- Diagnose in this order: retrieval (creative), ranking (data), auction.
- Campaign names: <YYYY-MM>_<GOAL>_<COUNTRY>_<AUDIENCE>_<THEME>.
- Our business: <what we sell, prices, margins, main customer groups>.
- Our truth source for sales: <store / CRM>. Meta numbers are estimates.
- Write for a business owner: numbers first, short sentences, no jargon.
```

Customize

Skills

Connectors

Plugins

Yours

Discover

Search skills and plugins



+ Add

Upload skill

Create a skill

Create with Claude

From Anthropic

Data

In the Claude app: Customize > Skills > + Add (1) > Upload skill (2), then pick the zip. Real screen, 30 Sep 2026.

CLAUDE APP**Before you upload**

Put the file in a folder named `meta-ads-operator` and zip the folder, not the file. Skills need code execution: on personal plans it is under Settings > Capabilities; on Team and Enterprise plans an admin switches it on.

TERMINAL**In Claude Code**

Save the file as

```
~/claude/skills/meta-ads-operator/SKILL.md
```

Claude Code finds it on its own, in every project.

Sources · Meta for Developers: ads MCP server overview, get started, tools, rules (read 30 Sep 2026); Meta Q1 2026 earnings call (open beta, 29 Apr 2026) · Claude Help Centre: custom connectors (11 Aug 2026), skills (22 Jul 2026) · screens captured in claude.ai on 30 Sep 2026.

08

PART TWO · RUN IT WITH CLAUDE

Ten prompts to *paste*

Each prompt is written to be copied as it is. Fill in the parts in angle brackets first.

YOU WILL BE
ABLE TO

run a full audit, a creative plan and a weekly report on your own account in under an hour a week.

FILL IN

<angle brackets>

Replace these with your own details before you paste.

SAFETY

READ ONLY

Nine of the ten prompts only read. Say it in every prompt anyway.

TRUST

READ vs ESTIMATE

Every figure is labelled, so you know which numbers came from Meta.

P01 Account X-ray

MONTHLY · READ ONLY

Run first, then once a month. The report tells you which strategy page to read.

You are my Meta Ads analyst. Use the connected Meta Ads tools to read my ad account.
READ ONLY. Do not create, edit, pause or delete anything.

Account: <ad account name or ID>

Business: <what we sell, average order value, main goal>

Period: last 30 days, compared with the 30 days before

1. Structure. For every active campaign: objective, budget type, bid strategy, number of ad sets, spend. Mark any campaign that is not in Advantage+ and name the condition that broke: campaign budget, audience, or placements.
2. Learning. List ad sets in Learning or Learning limited. Estimate weekly optimisation events and name the likely cause: small audience, low budget, tight bid or cost goal, auction overlap, rare event, or too many ads.
3. Creative. Group active ads into concepts (same idea = one concept, even if the colour or headline differs). Show spend share per concept.
4. Fatigue. For ads live 7+ days, compare the last 7 days with the 7 before: frequency, click-through rate, cost per result.
5. Tracking. List the conversion events in use and any ad sets whose attribution setting differs from the rest.

Before you start, repeat back the account name, currency and date range.

If a figure is not available through the tools, write NOT AVAILABLE.

Never fill a gap with a guess.

Output: a five-line summary a business owner can read, one table per section, then the three changes that would help most, in order.

Label every figure READ (from the account) or ESTIMATE (your inference).

P02 Structure check

BEFORE ANY LAUNCH

Read my account structure. READ ONLY.

Check each active campaign against these rules and report PASS or FIX:

1. One optimisation goal and one bid strategy per campaign.
 2. Campaign budget on, or a single ad set.
 3. Advantage+ audience on, or location-only targeting.
 4. No placement exclusions at ad set level (account-level blocks are fine).
 5. Fewer than 70 ad sets in any campaign on campaign budget.
 6. Customer-list exclusion present on campaigns meant for new customers.
 7. Campaign names follow: <YYYY-MM>_<GOAL>_<COUNTRY>_<AUDIENCE>_<THEME>.
- For every FIX, say what to change and whether the change resets learning.
Do not suggest splitting an ad set only to see results by age, gender or region; point me to Breakdowns instead.

P03 Concept gap finder

EVERY 2 WEEKS

Pull every ad that spent money in the last 60 days with its creative text, format and spend. READ ONLY.

1. Group the ads into concepts. Tag each concept with:
ANGLE (problem, desire, proof, price, newness), PERSON (who it speaks to),
FORMAT (video 9:16, image 4:5, carousel, creator ad), HOOK (first 3 seconds).
2. Table: concept | angle | person | format | hook | ads in it | spend share |
best cost per result in the concept.
3. Name the combinations we have never tried, and flag any concept holding
over 50% of spend (a single point of failure).
4. Propose 5 new concepts. Each must differ from every current concept on at
least one of angle, person or format. A new colour or headline does not count.

P04 Creative brief: 10 concepts

BEFORE A SHOOT OR A DESIGN BATCH

Write 10 ad concepts for <product>, sold to <customer> at <price>.

What makes it different: <3 facts we can prove>. Claims to avoid: <list>.

For each concept give:

- Angle, person and format (no two concepts may share all three)
- Hook: the first 3 seconds, shot by shot, or the headline for an image
- Body: 2-3 short lines, in plain words
- Proof: which fact backs the claim
- Cheapest way to make it (phone video, product photo + text, screen recording)

Order the list from cheapest to most expensive to produce.

Lay each concept out as a card a designer can work from: headline, visual,
on-screen text, voiceover (if video), call to action, aspect ratio.

No claims about health, money or results that we cannot prove.

P05 Tracking check

AFTER ANY WEBSITE CHANGE

Help me audit Meta tracking. Use the connected tools where they expose
dataset and event data; ask me for anything they cannot reach.

1. List the conversion events firing in the last 7 days, by source
(browser or server), with counts.
2. For Purchase: compare Meta's count for <date> with my order count for the
same day, which is <number>. Report the ratio. Near 2.0 = duplicates.
3. Check that browser and server events share an event_id.
4. Report Event Match Quality per event and which customer details are sent.
5. Check the optimisation event of each active ad set: can it reach about 50
per week at current budget and cost? Show the arithmetic.

Output a fix list in order of impact. Do not change any setting.

P06 Weekly brief

EVERY MONDAY

Compare the last 7 days with the 7 days before, for each active campaign:
spend, results, cost per result, CPM, click-through rate, frequency.

READ ONLY.

Then explain each big change (over 25% either way) by stage:

- RETRIEVAL: delivery or spend fell, fewer new people reached
- RANKING: clicks steady, conversions fell (check tracking and landing page)
- AUCTION: CPM rose across the account (season, competition)
- PLATFORM: every campaign moved on the same day (hold still)

List the significant edits made this week and their dates.

Recommend at most one change per campaign. Write for a business owner:

short sentences, numbers first, no jargon.

End with a three-line summary I can paste into our team chat.

P07 Fatigue watch

EVERY FRIDAY

For every ad live 14+ days with meaningful spend. READ ONLY.

1. Build my baseline: hook rate (3-second plays / impressions) and hold rate (plays at 75% / 3-second plays) for all video ads in the last 90 days. Report the 25th, 50th and 75th percentiles.
2. For each current ad: this week versus its own first week on frequency, click-through rate, hook rate and cost per result.
3. Flag FATIGUED when, versus its own first week, cost per result is up more than <A, start at 30%> and click-through rate is down more than <B, start at 20%>. These are starting points; tune them to my account.
4. For each flagged ad, write 3 new hooks that keep the same body and offer. Use my percentiles, not internet benchmarks.

P08 Scale plan, with approval

WHEN A CAMPAIGN IS READY TO GROW

The only prompt that writes to the account. It needs a connector with write access, and your explicit approval.

Goal: grow <campaign> from <current daily budget> to <target> without breaking learning. Read the account first. Make NO change until I approve.

1. Check the campaign is stable: out of learning, spending its full budget, cost per result within <acceptable cost> for the last 7 days.
2. Build a plan using this ladder, in order:
 - a) budget scheduling for known peaks (up to 8x daily budget, 3+ hours)
 - b) budget increases at the start of the day
 - c) loosen a cost or ROAS goal by 5-10% only if budget goes unspent
 - d) combine ad sets that each get too few events
3. Check the ceilings: Meta's daily spending limit, account spending limit, ad set spending limits.
4. Present the plan as a numbered change list: object, field, old value, new value, date. No more than one change per campaign per week.
5. Ask: "Approve changes 1 to N?" Wait for my reply.
6. After approval, apply one change at a time, read it back, and log it:

date	object	field	old	new	approved by
------	--------	-------	-----	-----	-------------

P09 Reality check

MONTHLY, WITH YOUR OWN SALES EXPORT

I am attaching my order export for <month> (columns: date, order ID, customer ID or email, revenue, first-time customer yes/no). Compare it with Meta's reported results for the same month. READ ONLY.

1. Meta-reported purchases and revenue, by campaign, with the attribution setting used.
2. My actual orders, revenue and new customers for the month.
3. The ratio of Meta-reported purchases to actual orders. Say plainly what it means; above 1.0 means Meta claims more sales than happened in total.
4. Cost per new customer = total ad spend (from billing) / new customers.
5. MER = total revenue / total ad spend.
6. Three sentences on what changed versus last month and why, marking anything you cannot prove from the data as a guess.

P10 Competitor ad scan

QUARTERLY

Use the Meta Ad Library (facebook.com/ads/library) for these competitors: <brand 1>, <brand 2>, <brand 3>. If you cannot open it, I will paste the links or screenshots of their active ads.

For each brand:

1. Count active ads and the date each started running.
2. List the 5 longest-running ads. Long-running ads are the ones a brand keeps paying for, the best public sign of what works for them.
3. Tag each with angle, person, format and hook.
4. Offers and prices they repeat.

Then write: 3 angles all of them use (the category's table stakes), 3 angles none of them use (our openings), and 5 concept ideas for us.

Describe their ads in your own words. Do not copy their copy.

09

PART THREE • MAKE IT YOURS

Make it fit your *business*

The strategies stay the same. The event you optimise for, the set-up and the first angles change.

YOU WILL BE
ABLE TO

adapt the playbook to your kind of business in one sitting, and set a weekly routine that takes under an hour.

D2C AND E-COMMERCE**Online store**

Optimise for: Purchase with value. Add to cart while you are under about 50 purchases a week.

Set up: Sales campaign, one ad set, customer-list exclusion for new customers, catalogue connected.

Angles to start with: Proof (reviews, unboxing), price and offers, newness.

Prompts: P01, P03, P04, P09

RESTAURANT, CLINIC, SALON, GYM**Local business**

Optimise for: Leads or calls; bookings if your booking system reports back to Meta.

Set up: Location radius at account level, one campaign, Instant Form with one qualifying question.

Angles to start with: The place and the people, a limited offer, a result.

Prompts: P02, P04, P06

REAL ESTATE, EDUCATION, B2B SERVICES**Lead generation**

Optimise for: Qualified leads sent back from your CRM through the Conversions API, not raw form fills.

Set up: Lead campaign, higher-intent form (adds a review step), CRM sync within a day.

Angles to start with: Problem solved, proof, a free guide or consultation.

Prompts: P05, P06, P09

COMMON ACROSS INDIA**Sales on WhatsApp**

Optimise for: Conversations to start, then purchases or delivered orders sent back with the ctwa_clid.

Set up: Click-to-WhatsApp ad, instant auto-reply, follow-ups inside the free window.

Angles to start with: Ask a question, see the product live, order on chat.

Prompts: P05, P06, P09

W**WhatsApp: reply inside 24 hours, sell inside 72**

Meta opens a free 72-hour window only if you reply within 24 hours of the customer's message; the 72 hours run from your reply. Set an instant auto-reply, and send offers inside that window. Marketing templates sent later are charged per message.

A**Running many accounts?**

Save the skill on page 11 once per client with that client's details, and run P01 for each account on the first Monday of the month. Keep one approval log per client.

THE WEEKLY ROUTINE

UNDER AN HOUR A WEEK

WHEN	RUN	TIME
Monday	P06 Weekly brief, then make at most one change per campaign	15 min
Wednesday	P03 Concept gap finder every second week, and brief new ads with P04	20 min
Friday	P07 Fatigue watch, and launch the week's new concepts in one batch	15 min
First Monday of the month	P01 Account X-ray and P09 Reality check	30 min

Sources • Meta developer docs: WhatsApp Business Platform pricing (per-message billing since 1 Jul 2025; free entry point window) and Conversions API for business messaging • Meta Business Help Centre: Instant Forms, higher intent.

10

PART THREE • EVERYTHING IN ONE PLACE

Your command *centre* in Claude

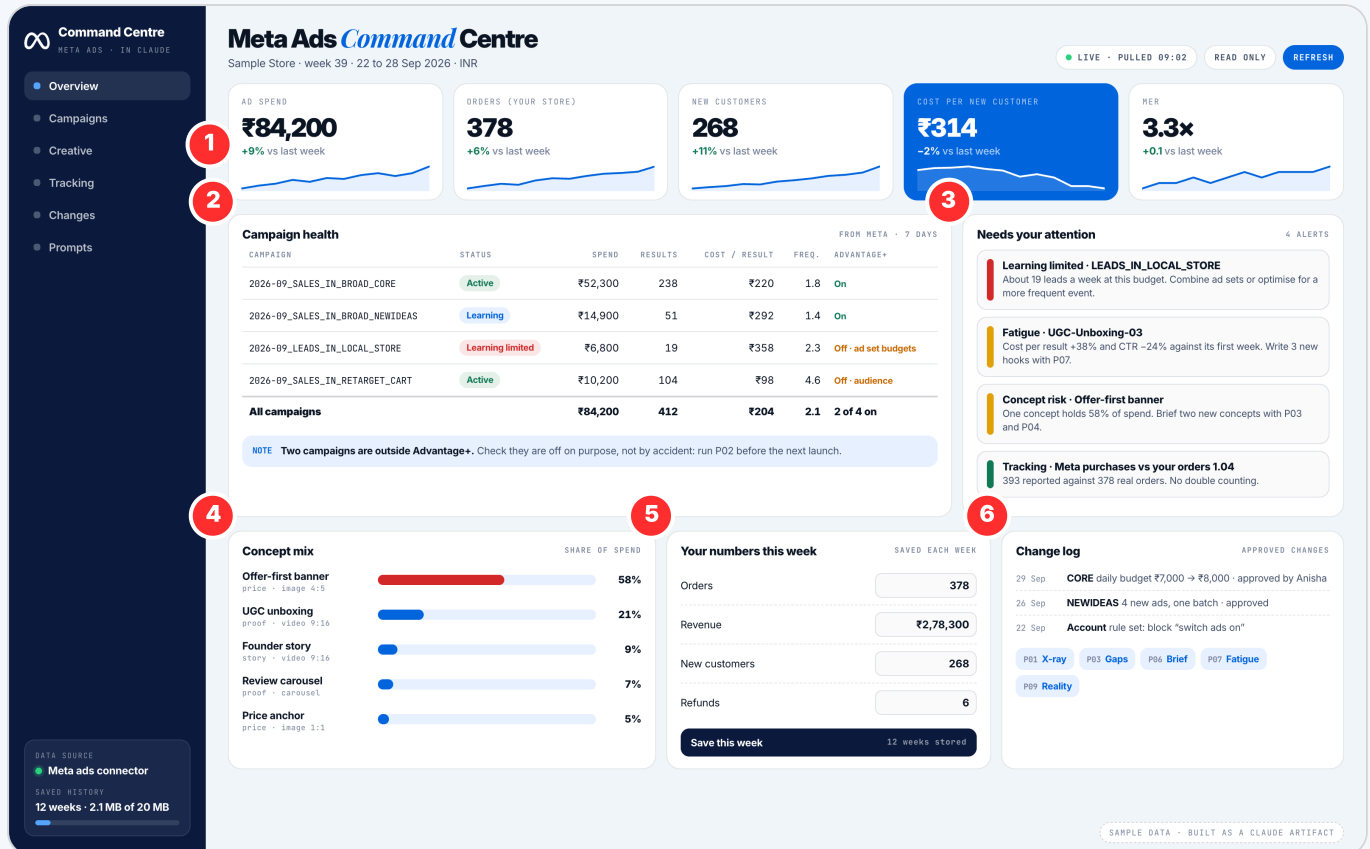
One dashboard that pulls live results through your Meta connector, keeps your own sales numbers, and shows what to fix next.

YOU WILL BE
ABLE TO

have Claude build a working dashboard for your account with one prompt, and know what every panel is for.

WHAT IT LOOKS LIKE

A REAL CLAUDE ARTIFACT • SAMPLE DATA



A real artifact built from prompt P11, shown with sample data. Motion in the live page: numbers roll up, cards arrive in sequence and the lines draw on, built with anime.js.

1

Scorecard

The five numbers from page 8, each with a 12-week line. Cost per new customer is the one to manage.

2

Campaign health

Status, cost and Advantage+ state, with the reason when a campaign has dropped out of it.

3

Needs your attention

The rules from this guide, turned into alerts: learning limited, fatigue, concept risk, tracking gaps.

4

Concept mix

Spend share by idea, so one concept never quietly carries the account.

5

Your numbers

Orders, revenue and new customers from your own store, saved every week.

6

Change log and prompts

Every approved change, plus one-click copies of the prompts you use most.

HOW IT WORKS

THREE THINGS HAPPEN EACH TIME YOU OPEN IT

OPENS

Pulls live data

Through your Meta connector

Read only. Each person who opens it approves access once, and it runs on their own connection.

REMEMBERS

Keeps your numbers

Inside the artifact

Weekly snapshots and your sales inputs stay in the artifact's own storage, up to 20 MB.

FLAGS

Turns rules into alerts

From pages 3 to 8

Learning limited, fatigue, concept risk and tracking gaps, each with the fix.

P11

Build my command centre

ONCE · THEN OPEN IT EVERY MONDAY

Paste into a new chat with your Meta connector switched on. Add your prompt texts at the end.

Build me a dashboard artifact called "Meta Ads Command Centre" for my ad account <account name>. Currency <INR>. Week starts on Monday.

DATA (read only)

- Each time the page opens, pull through my Meta Ads connector: campaigns, ad sets and ads with status, learning stage, spend, results, cost per result, CPM, CTR and frequency, for the last 7 days and the 7 before; plus each campaign's budget type, audience setting and placements.
- Never call a tool that creates, edits, pauses or switches anything on.
- Save one snapshot per week in the artifact's storage. Keep 26 weeks.
- Add a weekly form for my own numbers: orders, revenue, new customers, refunds. Save it with that week's snapshot.

PANELS

1. Scorecard: ad spend; orders, new customers (from my form); cost per new customer = spend / new customers; MER = revenue / spend. Show the change against last week and a 12-week line for each.
2. Campaign health: status, spend, results, cost per result, frequency and Advantage+ state. If it is off, name the condition that broke: campaign budget, audience or placements. Add a totals row.
3. Needs your attention, one line each:
 - an ad set in Learning limited, with the likely cause
 - an ad live 14+ days whose cost per result is up 30% and CTR down 20% against its first week (fatigue)
 - one concept holding more than 50% of spend (concept risk)
 - Meta purchases / my orders outside 0.8 to 1.2 (check tracking)
4. Concept mix: group ads into concepts (same idea = one concept) and show each concept's share of spend.
5. Change log: every change I record, with date, object, old and new value, and who approved it.
6. Prompt buttons for the prompts I paste below. A click copies the text.

DESIGN

Numbers first, plain labels, Meta blue accents, readable on a laptop. Show "Last pulled" with the time, and a Refresh button. Mark any number you infer rather than read as ESTIMATE.

Visuals

Artifacts

Create and publish artifacts from Claude Code and Cowork to a shareable Anthropic-hosted page, and share chat and Cowork artifacts with your organization.

AI-powered artifacts

Build apps and interactive documents that use Claude inside the artifact.

Inline visualizations

Allow Claude to generate interactive visualizations, charts, and diagrams directly in the conversation.

Settings > Capabilities: the artifact switches that let Claude build working apps (1). On Team and Enterprise plans an admin may control them.

**Know the limits**

Dashboards that use connectors need a paid plan (Pro, Max, Team or Enterprise). They stay private, or inside your organisation, and cannot go on a public link.

**Find it again**

Everything Claude builds is saved in the **Artifacts** tab in the sidebar. Open it each Monday, enter your numbers, and read the alerts before P06.

11

KEEP THIS PAGE

The one-page *checklist*

Everything in the playbook, reduced to what you check before launch, every week and every month.

USE IT TO

run your Meta account from this page alone once the setup is done.

BEFORE LAUNCH

☐ Meta's daily spending limit checked (Payment settings)

☐ Pixel and Conversions API share an event_id

☐ Purchases vs own orders ratio near 1.0

☐ Optimisation event can reach about 50 a week

☐ Customer list uploaded and excluded where needed

☐ Campaign budget, broad audience, automatic placements

☐ Names follow the naming pattern

☐ Creative enhancements reviewed on every ad

☐ No legacy Advantage+ shopping campaigns left

EVERY WEEK

☐ P06 brief read; one change per campaign at most

☐ New concepts launched in one batch

☐ Nothing cut before 72 hours at equal budget

☐ Fatigued ads get 3 to 5 new hooks

☐ Cost goal and budget never changed together

☐ Last significant edit column checked

☐ Approval log updated for any change

EVERY MONTH

☐ P01 Account X-ray run

☐ P09 Reality check against your own sales

☐ Cost per new customer and MER recorded

☐ Concepts: none holding over half of spend

☐ Competitor scan (P10) every quarter

☐ Attribution window unchanged

☐ Skill file updated with anything learned

ABOUT THIS GUIDE

EDITION 01 • SEPTEMBER 2026

AUTHOR

Written by Anisha Dogra

Anisha works on performance marketing and AI systems for brands. This playbook is built from a source-checked research base on Meta's 2026 platform, re-checked on 30 September 2026.

METHOD

How the facts were handled

Platform facts come from Meta's own documentation, API and earnings calls. Meta's lift figures are labelled as Meta's. Industry numbers without a traceable source were left out.

Use it freely. Copy the prompts, adapt the skill and share the checklist with your team. Meta changes its platform often: check dates on any setting before you rely on it. Nothing here is financial advice, and results depend on your product, offer and market.



Start with one prompt this week: P01.

Read the report it writes, then turn to the strategy page it points you to.

META ADS PLAYBOOK 2026
ANISHA DOGRA

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