VIBELETS AGENCY PLAYBOOK

Run every client's Facebook ads account with a clear plan, every week

Four guides and three templates for agencies running Meta ads for ecommerce and DTC brands: audit an account, run a clean creative test, report to the client, and check an AI ads tool.

Inside

1. How to audit a client's Facebook ad account
2. How to run a clean Facebook ad creative test
3. How to report Facebook ads results to a client weekly
4. How to tell if an AI ads tool is real AI or just rules

Templates

- Client ad account audit (Google Sheets): opens a copy in your own Google account
- Weekly client report (Google Sheets): opens a copy in your own Google account
- Client approval agreement (Google Docs): opens a copy in your own Google account

Use them with or without Vibelets. Free to copy and adapt. www.vibelets.ai/for/agencies

GUIDE 1 OF 4

How to audit a client's Facebook ad account

Most agencies inherit a client's Facebook ad account and find the problems a month later, after they own the results. The tracking was half broken, six ad sets were stuck in learning, and an ad that stopped working in spring was still taking a fifth of the budget.

An audit before you sign, or in the first week, fixes that. It tells you what you are walking into, gives you a list of quick wins for the first 30 days, and gives you a baseline the client agreed to before your name was on the account.

This guide is the audit we would run: six checks, in order, each with where to look in Ads Manager or Events Manager and what "bad" looks like. You can do it in about an hour with view access to the account.

Key takeaways

- Check tracking first. If the Pixel and Conversions API aren't both sending clean, deduplicated events, every other number in the account is suspect.
- Look for ad sets stuck in learning. Meta says an ad set usually exits after about 50 results in the week after its last significant edit.
- List every ad set that has spent well past the client's target CPA with zero conversions. That is the fastest money you can save.
- Find ads that have run for weeks while cost per result climbs, and check what Meta's Delivery column says about them.
- Finish with pacing and objectives: is the money landing where the plan says, and is each campaign optimizing for what the client actually sells?

Before you start: set up the hour

Ask the client for partner access to the ad account and to the dataset (the Pixel) in Events Manager. View access is enough for an audit. Ask for two numbers too: their target CPA or target ROAS, and the orders or revenue their store recorded for the last 30 days.

In Ads Manager, set the date range to the last 30 days, then compare against the last 90 for context. Budget your time roughly like this: 15 minutes on tracking, 10 on structure, 10 on wasted spend, 10 on creative, 15 on pacing, objectives and writing it up.

Check 1: Tracking

Do this first because every other check reads conversion numbers. If those are wrong, your audit will be too.

Where to look

Open Events Manager, pick the client's dataset, and click View details on the Purchase event (or Lead, for a lead-gen client). Meta's server event details view has tabs for Event overview, Event coverage, Event matching, Event deduplication and Data freshness. Go through them in that order.

- **Both sources firing.** Meta recommends a redundant setup: the same events sent from the Pixel in the browser and from the Conversions API on the server.
- **Event coverage.** Meta's guidance is to aim for a 75% ratio of Conversions API events to Pixel events.
- **Deduplication.** When both sources send the same event, Meta deduplicates it when the event name and event_id match (or, as a fallback, the event name and external_id or fbp).
- **Event Match Quality.** Meta scores it from 0 to 10 per web event sent through the Conversions API, using the last 48 hours of data. Email and click ID are the two parameters Meta lists as high priority.

What bad looks like

Purchase comes only from the browser, with no server events. Coverage sits well under 75%. The deduplication tab shows events without an event_id. Event Match Quality on Purchase is low and the event sends no email. Or the simplest test fails: Ads Manager reports more purchases in the last 30 days than the store recorded orders. That usually means double counting, and it makes the account look better than it is.

Check 2: Structure and the learning phase

Meta says an ad set exits the learning phase once it delivers stably, which usually happens after about 50 results in the week after its last significant edit. Budget spread across too many ad sets keeps them all in learning.

Where to look

At the ad set level in Ads Manager, read the Delivery column. Add the Last significant edit and Optimization events columns through Columns, then Customize columns. Count how many active ad sets show "Learning" or "Learning limited".

What bad looks like

Most of the spend sits in ad sets marked Learning limited. Meta lists the usual causes: small audiences, low budget, a low bid or cost control, high auction overlap, an infrequent optimization event, or too many ads at once.

Do the maths. Say the client's target CPA is $40. Fifty purchases a week costs about $2,000, or roughly $286 a day per ad set. If the account runs $300 a day across six ad sets, each one gets $50 and can expect around nine purchases a week. None of them will leave learning.

Also check the Last significant edit dates. Meta counts changes to targeting, creative, the optimization event or bid strategy, adding a new ad, and pausing for 7 days or more as significant edits. Large budget changes can count too. If the previous team edited every few days, the account never had a chance to settle.

Check 3: Spend with no return

Where to look

At the ad set level, last 30 days, sort by Amount spent. Add the Results column for the client's conversion event. Then do the same at the ad level.

What bad looks like

Ad sets or ads that have spent well past the client's target with zero conversions. Pick a threshold and write it down. Say the target CPA is $40 and you flag anything that spent three times that, $120, with no purchase. Add up what those lines spent. "$1,800 of last month's spend bought zero orders" is the sentence that wins pitches, as long as Check 1 shows the tracking can be trusted.

Check 4: Creative age and fatigue

Where to look

At the ad level, note when each active ad started running and add the Frequency and Cost per result columns. Compare the last 7 days with the first weeks the ad ran. Then read the Delivery column. Meta shows Creative limited when an ad's cost per result is higher than the ads you ran before but under twice as much, and Creative fatigue when it is twice as much or more. Meta only offers this for some setups, mainly ad sets with one creative, so don't treat a missing label as a clean bill of health.

What bad looks like

An ad that has run for six weeks or more, with frequency rising and cost per result climbing week over week, still taking a large share of spend. Or no new creative launched in the last 30 days at all. Note which ads are holding up too: they seed your first tests.

Check 5: Budget pacing and objectives

Budget pacing

Meta paces spend across the ad set's schedule, and daily budgets flex. Per Meta's daily budget rules, it may spend up to 75% over the daily budget on a given day, but no more than 7 times the daily budget in a Sunday to Saturday week. So a $500 daily budget can spend $875 on Tuesday and still be on plan.

Judge pacing against the client's monthly plan, not single days. Bad looks like month-to-date spend far ahead of or behind plan, ad sets that consistently spend well under budget (often a cost control set too low or an audience too small), or budget sitting in campaigns the client doesn't care about.

Objectives

Check each campaign's objective and each ad set's performance goal. Meta notes these can differ: a Sales campaign can still optimize for link clicks. Bad looks like an ecommerce client paying for Traffic or Engagement campaigns while judging you on orders, or Sales campaigns optimizing for clicks or landing page views with no stated reason. Optimizing for add to cart can be a deliberate choice when purchases are too few to exit learning. Ask before you call it a mistake.

Copy-ready audit checklist

Paste this into the client doc and fill in one line per check.

1. Tracking: Pixel and Conversions API both sending Purchase? Coverage vs Meta's 75% guide? Deduplicated by event_id? Event Match Quality on Purchase (0 to 10)? Ads Manager purchases vs store orders, last 30 days. Finding: ___
2. Structure: number of active ad sets. How many are Learning or Learning limited? Share of spend in them. Last significant edit dates. Finding: ___
3. Spend with no return: threshold used (for example 3x target CPA). Ad sets and ads over it with zero conversions, and their total spend. Finding: ___
4. Creative: age of each top-spending ad, frequency trend, cost per result trend, any Creative limited or Creative fatigue status. Last new ad launched on: ___
5. Budget pacing: month-to-date spend vs plan. Ad sets underspending their budget. Finding: ___
6. Objectives: objective and performance goal per campaign vs the client's business goal. Mismatches: ___
7. Top 3 fixes for the first 30 days: ___

Where Vibelets fits

Vibelets audits each client's Meta ad account once it is connected and the 14-day trial starts. Each week it writes a plan of what to pause, test and launch, with the reason for each proposed change, and it runs only the changes your team approves. Several client accounts sit in one workspace, each with its own audit and plan. It covers Meta only and never promises a ROAS or CPA. See Vibelets for agencies.

FAQ

How long does a Facebook ad account audit take?

About an hour for a typical ecommerce account with a handful of campaigns, if you have view access and the client's store numbers ready. Accounts with many brands or countries take longer.

What access do I need from the client?

View access to the ad account and to the dataset in Events Manager, shared to your business as a partner. You don't need edit rights for an audit, and asking for less makes it an easier yes before a contract is signed.

Should I share the audit with a prospect before they sign?

Share the findings, not the full fix plan. The tracking result, the wasted spend total and the learning phase count show you know the account. The plan for fixing them is what they hire you for.

What if tracking is broken?

Then that is the first fix, and the other five checks become directional. Say so in the write-up, fix the events, and rerun Checks 2 to 4 once a couple of weeks of clean data has come in.

Sources

1. Meta Business Help Center: About the learning phase
2. Meta Business Help Center: Significant edits and learning phase
3. Meta Business Help Center: About learning limited
4. Meta Business Help Center: Best practices for Conversions API
5. Meta Business Help Center: About event match quality
6. Meta Business Help Center: About deduplication for Meta Pixel and Conversions API events
7. Meta Business Help Center: View server event details in Meta Events Manager
8. Meta Business Help Center: About creative fatigue recommendations in Meta Ads Manager
9. Meta Business Help Center: About pacing
10. Meta Business Help Center: About daily budgets
11. Meta Business Help Center: About performance goals

GUIDE 2 OF 4

How to run a clean Facebook ad creative test

Most creative tests on client accounts don't teach anyone anything. Three new ads go live with different hooks, different footage and different offers, a week later one has a lower CPA on a handful of purchases, and nobody can say why it won.

A clean test is slower to set up and much faster to learn from. You change one thing, you decide what you expect before you spend, and you read the numbers in an order that tells you where the ad broke: did people stop, did they click, did they buy.

This is the full version of the creative test checklist from the Vibelets agency playbook: the five steps, a worked example, when to use Meta's A/B test tool, and a brief you can paste into a client doc.

Key takeaways

- Change one variable per test, and for video that is usually the hook: the first line and first few seconds.
- Pick 3 hooks from the account itself: the top ad's opening line, the customers' biggest objection and one proof point.
- Write down which hook you expect to win, and why, before launch.
- Launch together to the same audience, agree the impressions each needs, then read hook rate and link CTR before CPA.
- Put new hooks on one proven video before you pay for new footage, and check every AI-made ad for anything that looks AI generated.

Step 1: Change one variable, usually the hook

Meta's best practices for A/B testing say results are more conclusive when the versions are identical except for the variable you test. If the hook, the footage and the offer all change at once, a win tells you nothing you can reuse on the next brief.

For video ads, the hook is usually the right variable to test first. It decides whether anyone sees the rest of the ad, and it is the cheapest part to change. Keep everything after the opening, plus the offer, landing page, primary text and headline, the same.

For static ads the same logic applies to the headline or the first line on the image. Hook rate doesn't apply to statics, so you read link CTR first instead.

Step 2: Pick 3 hooks before you brief anyone

Three is enough to learn something and few enough that each version gets real spend.

The top ad's opening line

Sort the account by amount spent over the last 90 days and take the opening line of the ad that has carried the most spend at an acceptable CPA. This is your control.

The customers' biggest objection

Read the client's reviews, support tickets and ad comments for the reason people give for not buying: too expensive, won't work for my skin type, takes too long to arrive. Turn it into an opening line that answers it head on.

One proof point

A specific, checkable fact about the product: a review count, a guarantee, a test result, a press mention. It must be true, and the client signs it off.

Step 3: Write down which hook you expect to win, and why

Meta's A/B testing guidance recommends starting with a measurable hypothesis. Write one line per hook before launch, for example: the objection hook will get the highest link CTR, because comments show price is the main reason people leave.

If you are right, you have a reason to reuse in the next brief. If you are wrong, you have learned something about the customer. Either way the client gets a clear story for the weekly report: what we expected, what happened, what we do next.

Step 4: Launch the ads together, to the same audience, with enough impressions

Results shift with day of week, season and auction pressure, so last week's ad and this week's ad are not a fair comparison. Same start date, same audience, same placements, same optimization event.

Option A: Meta's A/B test tool

Meta's A/B test feature, which you can create in Ads Manager or in the Experiments tool, splits your audience so nobody sees more than one version. Meta says you can test up to five ad variants, and that informal testing, such as turning ad sets on and off by hand, can lead to overlapping audiences and unreliable results. Tests run 1 to 30 days, and Meta recommends at least 7, longer if customers usually take over a week to convert.

The tool calls the winner on the lowest cost per result for the key metric you choose, so you still need to read hook rate and link CTR yourself to know why it won. And Meta advises not using the test audience for any other campaign running at the same time, so check for overlap before you launch.

Option B: one test ad set

The quicker, cheaper route is separate ads in one test ad set. Know the trade-off: Meta says that when an ad set has multiple ads, it shows the ad most likely to get the lowest cost per optimization event for each person, so the ads won't necessarily be delivered the same number of times. Read rates, not totals.

Don’t drop test ads into the client’s best ad set to save time. Meta lists adding a new ad as a significant edit, which sends the ad set back into the learning phase. Use a separate test ad set or campaign.

Decide what enough impressions means before launch

Meta’s best practices ask for a test budget that produces enough results to pick a winner, but they don’t set an impression number for you. Set your own and write it in the brief: say, no version gets judged before 5,000 impressions. The exact number matters less than agreeing it before launch, so nobody calls a winner on day two.

Step 5: Read hook rate and link CTR before CPA

Read in this order, because each number shows where the ad lost people.

- Hook rate: 3-second video plays divided by impressions. Meta counts a play once the video runs at least 3 seconds, not counting replays. Ads Manager has no hook rate column, so build it once as a custom metric and save it to your reporting.
- Link CTR: Meta’s CTR (link click-through rate), which is link clicks divided by impressions.
- CPA: cost per purchase or lead. Read it last: it rests on far fewer events than the first two.

A worked example

Say the client’s target CPA is $40, and each hook spent about $100 for 5,000 impressions.

- Hook A, the top ad’s opening line: 1,250 3-second plays (25% hook rate) and 40 link clicks (0.8% link CTR).
- Hook B, the objection: 1,750 plays (35% hook rate) and 60 link clicks (1.2% link CTR).
- Hook C, the proof point: 1,000 plays (20% hook rate) and 55 link clicks (1.1% link CTR).

At $100 each, even an on-target hook has only 2 or 3 purchases, so CPA can’t separate them yet. The earlier numbers can. Hook B stops the most people and sends the most clicks, so it is the one to scale. Hook C is the interesting one. It stops fewer people, but it gets 55 link clicks from 1,000 plays, about 5.5 per 100 viewers, against about 3.4 for Hook B. The proof point persuades. It just doesn’t stop the scroll. The next test writes itself: Hook B’s opening line with Hook C’s proof point in the first five seconds.

If a hook wins on hook rate and loses on link CTR, it is probably grabbing attention the body of the ad can’t pay off. If link CTR is strong and CPA is weak across every version, look at the landing page and offer before you blame the creative.

Before you shoot new footage, and before anything ships

New hooks on one proven video first

When a client’s video ad starts to fatigue, don’t book a shoot first. Take the video that has already carried spend, keep everything after the opening, and cut three new hooks onto it. It is cheaper and faster, and with the body held constant it is a clean hook test by design. Book new footage once fresh hooks stop beating the control.

Check AI-made ads for anything that looks AI generated

Review every AI-made hook or ad before the client sees it. Look for hands, faces and text on packaging, products that don't match the real one, voices that sound synthetic and captions that don't match the audio. One ad that looks fake can cost you the client's trust in every test after it.

Copy-ready creative test brief

Paste this into the client doc and fill it in before launch.

- Client and product:
- Variable being tested (one only):
- Held constant: footage after the hook, offer, landing page, primary text, headline, audience, placements, optimization event
- Hook A, top ad's opening line:
- Hook B, biggest customer objection:
- Hook C, proof point (client approved):
- Hypothesis, which hook wins and why:
- Test method: Meta A/B test tool, or separate test ad set
- Start date and end date (same start for every version):
- Minimum impressions per version before anyone reads results:
- Read order: hook rate, then link CTR, then CPA
- AI check done by, and date:
- Result and what we test next:

Where Vibelets fits

Once a client's Meta ad account is connected and the 14-day trial starts, Vibelets audits it, and each week it writes a plan of what to pause, test and launch, with the reason for each proposed change. Creative Studio builds image and video ads from the client's own best ads, a competitor's ad in the Meta Ad Library, or a product. Vibelets runs only the changes your team approves, new campaigns start paused, and the activity log records each change and who approved it. See Vibelets for agencies.

FAQ

How many hooks should I test at once?

Three is a good default for most client budgets. Meta's A/B test tool allows up to five variants, but every extra version splits the same budget thinner, so each one takes longer to reach the impressions you agreed on.

How long should a creative test run?

Meta recommends at least 7 days for its A/B tests and allows up to 30. If you run hooks in a single test ad set instead, set an impression minimum per version and a fixed end date in the brief, and don't call it

early.

Why not just pick the ad with the lowest CPA?

Because early CPA often rests on a few purchases, and a couple of lucky ones can flip the ranking. Hook rate and link CTR are built on thousands of impressions, and they also tell you where an ad failed, which is what the next brief needs.

Sources

1. Meta Business Help Center: About A/B testing
2. Meta Business Help Center: Best practices for A/B testing
3. Meta Business Help Center: Viewing and understanding A/B test results
4. Meta for Business: A/B testing ads on Facebook and Instagram
5. Meta Business Help Center: About ad delivery
6. Meta Business Help Center: Significant edits and learning phase
7. Meta Business Help Center: 3-second video plays
8. Meta Business Help Center: CTR (link click-through rate)
9. Meta Business Help Center: About custom metrics in ads reporting

GUIDE 3 OF 4

How to report Facebook ads results to a client weekly

Most weekly client reports are a screenshot of Ads Manager with some notes underneath. The client sees ROAS go up or down, doesn't know whether that is good for their business, and starts to wonder what the retainer is buying.

The fix is not a longer report. It is a report that ties every week to one number the client already cares about, follows the same order every time, and ends with one clear decision for the client to make.

This guide gives you that structure: how to agree the number, the 5 parts to report in order, how to handle numbers that don't match Ads Manager, and a template you can paste into your client doc today.

Key takeaways

- Agree the client's business number first, such as closed sales or revenue, and report against it every week.
- Use the same 5 parts in the same order: results against target, what changed, creatives holding or fatiguing, tests running, next week's plan and the one decision you need.
- Add MER when the client shares total revenue. It does not depend on any attribution setting.
- When your numbers differ from Ads Manager, name the attribution setting you read.
- Write each section so it survives being pasted into a chatbot: one number, one reason, one ask.

Agree the business number before the first report

Ads Manager will give you dozens of columns. The client cares about one or two things: how many sales closed, and how much revenue came in. Pick that number with them on the kickoff call and write it at the top of the report doc.

For a store, it is usually revenue or orders from their own platform, such as Shopify. For a high-ticket or lead-based client, it is closed sales, not leads. Then agree a target for it, and the spend you have to hit it.

Say the client wants 400 orders a month on $16,000 of Meta spend. That is a $40 cost per order. Now every weekly report has a yardstick: roughly 100 orders a week at about $40 each. Purchases, CPA and ROAS from Ads Manager still go in the report, but as the explanation, not the headline.

Ask one more question at kickoff: will they share total revenue each week? If yes, you can report MER.

What MER is, in one line

MER (marketing efficiency ratio) is the client's total revenue divided by their total marketing spend, across every channel, for the same period. If the store made $60,000 last week and spent $15,000 on all marketing, MER is 4.

MER is useful because it does not care which channel gets the credit. Ads Manager ROAS counts only the purchases Meta attributes to your ads. MER counts the whole business. When Meta ROAS looks great but MER is falling, the client is right to ask questions, and you want to be the one who raised it first.

Report in the same order every week

A fixed order means the client knows where to look, and you can't bury a bad week at the bottom. Use these 5 parts.

1. Results against the target, plus MER

Lead with the agreed number against the target, then spend, then MER if you have it. One line each. "92 orders against a target of 100. Spend $4,000, so about $43 per order. MER 3.8, down from 4.1." If the week missed, say so in the first sentence.

2. What changed last week, and why

List each change your team made: budget moved, ad sets paused, new ads launched. Give each one its reason. "Moved $50 a day from the prospecting ad set to the retargeting ad set because its cost per purchase was $30 against $55." Include the changes you chose not to make. A client who sees what you turned down understands what the retainer pays for.

3. Which creatives are holding up and which are fatiguing

Name the ads, not "creative performance was mixed". For each ad that is still working, name the hook, why you think it works, and the test that would prove it. For each ad that is slipping, say what you see: cost per result climbing week on week, or click-through falling.

Ads Manager can help here. For eligible ad sets, the Delivery column can show "Creative limited" when cost per result is higher than the advertiser's past ads but less than twice as much, and "Creative fatigue" when it is twice as much or more. If you quote that status, say it is Meta's label, not yours.

4. Which tests are running

For each test: what is being tested, what you expect to win and why, and when you will read it. "Testing 3 hooks on the bestseller video. We expect the objection hook to win. Reading results next Thursday." If a test finished, give the result in one line, even if it lost.

5. Next week's plan, and the one decision you need

Say what you will pause, test and launch next week. Then ask for one decision, with a date. "Can we raise daily spend from $500 to $650 from Monday? Please reply by Friday." If you need 3 decisions, the client will make none. Pick the one that moves the number most.

Name the attribution setting when numbers don't match

Your report and the client's Shopify or analytics numbers will rarely match Ads Manager. That is normal. What hurts trust is a number with no label on it.

Meta reports off-ad actions, such as a purchase on the client's site, based on the attribution setting chosen at the ad set level. For website conversions, Meta's standard settings count events within 1 or 7 days after a link click, within 1 day after an ad impression (view-through), and within 1 day after a non-link engagement such as a 5-second video play (engage-through). A purchase can count for the ad in Ads Manager and for email or organic search in the client's own analytics.

So whenever you quote a Meta number, add the setting in brackets: "118 purchases (7-day click, 1-day view)". If the client's store shows 100 orders from paid social, explain the gap in one sentence instead of hiding it.

Three more things to check before you send:

- Ad sets on different attribution models. Meta says results can't be compared in the same table across standard and incremental attribution. Use the Compare attribution settings feature instead.
- Events Manager counts. Events Manager shows most events received, while Ads Manager shows only events attributed to ads, so Events Manager will usually be higher.
- Third-party tools. Meta lists cross-device tracking, view-through credit, ad blockers and different metric definitions as reasons other tools may not match.

When leads arrive but sales don't, ask about follow-up

For clients who sell through a call or a quote, a common week looks like this: leads are on target, cost per lead is fine, closed sales are down. The reflex is to change the ads. Don't, yet.

First ask how fast the client follows up, and who does it. A lead who waits two days for a call has often moved on. If the answer is "whenever sales gets to it", put that in the report as the finding and the decision you need. Say the ads delivered 80 leads at $25 each and only 6 closed. The useful line is "leads are on target; can someone call new leads within the hour this week so we can see if close rate moves?", not a new set of creatives.

Write it so it survives a chatbot

Your client may paste your report into ChatGPT, Claude or Gemini and ask "is my agency doing a good job?". Plan for that. Vague lines like "performance stabilized as the algorithm optimized" read as filler to a person and to a model.

Write each section so it stands on its own: one number, one reason, one ask. "Orders were 92 against 100 because the top ad is fatiguing. We need approval for 3 new hooks by Friday." If that sentence is pasted alone, it still says what happened, why, and what you need.

A few habits help: write the full metric name the first time, put the date range at the top, label every Meta number with its attribution setting, and never refer to "the chart above".

Copy-ready weekly report template

Paste this into the client doc and fill it in each week.

- **Week:** [dates]. **Business number:** [closed sales or revenue]. **Target:** [number].

- **1. Results:** [actual] against [target]. Spend [amount], [cost per result]. MER [x], last week [x]. Meta numbers read at [attribution setting].
- **2. What changed and why:** [change] because [reason]. Considered but not done: [change] because [reason].
- **3. Creatives:** Holding: [ad name], hook [hook], why [reason], test to prove it [test]. Fatiguing: [ad name], [what you see], next step [action].
- **4. Tests running:** [what is tested], expected winner [hook] because [reason], read on [date].
- **5. Next week:** Pause [x]. Test [x]. Launch [x].
- **The one decision we need:** [question], by [date].

Where Vibelets fits

Once a client's Meta ad account is connected and the 14-day trial starts, Vibelets audits it. Each week it writes a plan of what to pause, test and launch, with the reason for each proposed change, so parts 2 and 5 of your report have reasons you can quote. It runs only the changes your team approves, and the activity log records each change and who approved it. See Vibelets for agencies.

FAQ

What is a good MER?

It depends on the client's margins, so there is no universal number. Work out with the client what MER they need to stay profitable after product costs and overheads, set that as the floor, and report the trend against it each week.

Should I report ROAS or MER?

Both, if the client shares revenue. ROAS from Ads Manager shows how Meta credits your ads under a given attribution setting. MER shows whether the business as a whole got more efficient. Lead with the one tied to the agreed business number.

Why don't my Meta purchases match Shopify?

Meta counts purchases that happen within the attribution window after a click, a view or an engagement, while the store or analytics tool may credit the same order to another channel. Name the attribution setting next to every Meta number and explain the gap in one line.

How long should a weekly report be?

Short enough to read in 2 minutes. If a section runs past a few lines, cut it to one number, one reason and one ask, and move the detail to a linked appendix.

Sources

1. Meta Business Help Center: About attribution models and attribution settings
2. Meta Business Help Center: About actions attributed to your ad
3. Meta Business Help Center: Differences between event counts in Meta Ads Manager, Ads Reporting and Events Manager

4. Meta Business Help Center: About conversion count differences between Meta Ads Reporting and third-party reporting tools
5. Meta Business Help Center: About creative fatigue recommendations in Meta Ads Manager

GUIDE 4 OF 4

How to tell if an AI ads tool is real AI or just rules

Every ads tool now says it uses AI. For an agency, that claim is hard to check from a demo. The demo account is clean and the recommendations sound sharp.

The real question is simpler: is the tool reading this client's account, or is it running the same fixed rules on every account and writing the output in nicer sentences? Rules have their place. But if you are paying for judgment, you should be able to see judgment.

This guide gives you a five-step test you can run on any AI ads tool, a one-week side-by-side trial against your own team, and a scorecard you can paste into a client doc or a vendor review.

Key takeaways

- Test the tool on a client account you know well, so you can tell a good read from a lucky one.
- A real read names the ad set, the creative, what changed and why now. A rule names a metric and a threshold.
- Run it on a second account. The calls should differ where the accounts differ.
- Ask what it chose not to do, and why. Restraint with a reason is a strong sign of a real read.
- Generic "raise budget" or "pause" advice, with nothing tied to the account, is a rule with a new label.

Why rules give every account the same advice

Start with what a rule is, because Meta already gives you one for free. Automated rules in Ads Manager check your campaigns, ad sets and ads, then take an action or notify you. You choose the criteria that trigger the rule, the action it takes and what it applies to. Meta's own examples include pausing a low-performing ad when it hits a specific metric, or raising budget based on ROAS.

Meta calls those criteria conditions, and an ad set must meet all the conditions on a rule to trigger it. That is the whole mechanism: if this number crosses that line, do this.

Say you set a rule: if cost per purchase is above $60 over the last 3 days and spend is above $200, pause the ad set. That rule will say the same thing to a skincare brand in its best month and a furniture brand in a slow week. It does not know that one ad set just had its budget doubled, or that the top creative has run for six weeks. It only knows the threshold.

Plenty of "AI" tools are that same logic with a chat window on top.

Steps 1 and 2: Use an account you know, and check for specifics

Step 1: Run the tool on a client account you know well

Pick the account your team understands best: its history, its seasonal swings, the creative that carried last quarter. On an account you don't know, a confident but wrong read looks the same as a correct

one.

Before you open the tool, have the account lead write down the three things they would change this week and why. This is your answer key.

Step 2: Check that it names the ad set, the creative and what changed

Read each recommendation and ask four questions. Which ad set or ad? Which creative? What changed? Why now, and not last week?

Here is the difference, with hypothetical numbers. Say the client's target CPA is $40.

- **Rule output:** "CPA is above target on 2 ad sets. Consider pausing underperformers."
- **A real read:** "The broad prospecting ad set went from about $38 to about $61 CPA after its daily budget doubled last Tuesday. Its Delivery column reads Learning again. Hold the budget and judge it after it has gathered more results, rather than pausing it now."

The second one is tied to a date, a change and a reason you can check in Ads Manager. It also lines up with how Meta describes the learning phase: an ad set usually exits learning after about 50 results in the week after its last significant edit, and Meta recommends avoiding frequent budget changes that can send an ad set back into learning. A rule watching CPA alone would have paused it.

Step 3: Run it on a second account and compare the calls

Now run the same tool on a second client with a similar target but a different story. Say client B also has a $40 target CPA and also saw CPA climb to about $60. But here, nothing was edited. The top video has run for seven weeks, and its cost per result has risen week after week while the newer ads hold steady.

A real read should land somewhere different on each account. On client A, the call is "hold budget, wait for learning." On client B, it is "the top video is fatiguing, brief new hooks on the same footage." Same symptom, different cause, different action.

If both accounts get "pause ad sets above target CPA," you are looking at a threshold. Lay the two lists side by side. Where the accounts differ, the advice should differ.

Steps 4 and 5: Ask what it chose not to do, and spot the relabeled rule

Step 4: Ask what it chose not to do, and why

This is the most revealing question you can ask. A rule cannot answer it, because a rule has no options it weighed. It either fired or it didn't.

A real read can say something like: "I did not raise budget on the retargeting ad set, even though ROAS is above target, because it has only about 20 results since its last significant edit and a budget change could restart learning." That is restraint with a reason, and it should match what your account lead would have said.

Step 5: Treat generic advice as a rule with a new label

Some phrases should make you look closer: “raise budget on winners,” “pause underperformers,” “refresh creative,” “test new audiences.” None of these are wrong. They are just true of every account, which is why they tell you nothing about this one.

If you can remove the client’s name from a recommendation and it still makes sense for any other client, it is a rule. If the tool only ever produces “raise” or “pause,” with nothing tied to an ad set, a creative or a date, you have your answer.

A one-week side-by-side trial: your team vs the tool

Keep it to one week and one account, and judge the quality of the read, not the results. One week is too short to credit a tool with a better ROAS or CPA, and some changes need time in learning before they show anything.

- **Day 1:** Pick the account from step 1. The account lead writes their own read first: top three changes, the reason for each, and one thing they would not touch. Seal it. Note the date range and the attribution setting you used.
- **Day 1, later:** Connect the tool to the same account. Give it read access, or make sure nothing runs without your approval. Collect its recommendations using the same date range and attribution setting.
- **Day 2:** Compare the two lists line by line. Mark each tool item as: matched the team, found something the team missed, or wrong. Check every “missed” and “wrong” item in Ads Manager.
- **Days 3 to 5:** Run the account as you normally would. Each day, log what the tool recommends and whether your team would act on it. Ask it step 4’s question at least twice.
- **Day 4:** Run the tool on a second account for step 3. Compare its calls across the two clients.
- **Day 7:** Fill in the scorecard below with the account lead and one other person on the team. Decide: extend the trial, use it as a helper, or drop it.

Copy-ready scorecard

Paste this into your vendor review or client doc. Score each line 0 (no), 1 (sometimes) or 2 (yes, consistently).

- **Specific:** names the exact ad set, ad or creative. Score: __
- **What changed:** says what moved, and when. Score: __
- **Why now:** explains why this week, not last week. Score: __
- **Different accounts, different calls:** advice differs where the two accounts differ. Score: __
- **Restraint:** says what it chose not to do, and why. Score: __
- **Checks out:** each reason can be verified in Ads Manager, and it matched or beat the team’s sealed read. Score: __
- **Total (out of 12):** __. 10 or more: worth a longer trial. 6 to 9: a helper, not a decision maker. Under 6: rules with a new label.

Test account: ____. Second account: ____. Date range and attribution setting: ____. Scored by: ____.

Where Vibelets fits

Vibelets audits each client's Meta ad account once it is connected and the 14-day trial starts, so you can run this test on an account you know. Each week it writes a plan of what to pause, test and launch, with the reason for each proposed change, which gives you something concrete to score. Several client ad accounts sit in one workspace, each with its own audit and plan, and the All accounts view shows them side by side for the second-account check. It runs only changes your team approves, and the activity log records each change and who approved it. See Vibelets for agencies.

FAQ

Are Meta's automated rules a bad idea?

No. Rules are good at simple, known limits, like turning off ads on a schedule or alerting you when spend passes a line. Meta itself says you should still monitor overall performance when using them. The problem is only when a tool sells rules as judgment.

Should the tool be allowed to make changes during the trial?

Not without your approval. The point of the trial is to grade its read against your team's. If it changes the account mid-week, you can no longer tell whether results came from the tool, your team or normal swings.

What if the tool disagrees with my account lead?

That is useful. Ask for its reason and check it in Ads Manager. If the reason holds up, it found something your team missed. If it doesn't, mark it wrong on the scorecard.

Is one week enough to judge an AI ads tool?

It is enough to judge whether the tool reads an account like a person who knows it. It is not enough to judge performance. If it passes the scorecard, extend the trial before you credit it with any change in CPA or ROAS.

Sources

1. Meta Business Help Center: About automated rules in Meta Ads Manager
2. Meta Business Help Center: About conditions for automated rules
3. Meta Business Help Center: About the learning phase