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B2B ON FACEBOOK AND INSTAGRAM

The Meta Playbook.

Executives are on LinkedIn for forty minutes a week and on Instagram every evening. How to reach them there, what to say, and what changed in Meta's targeting since the last time you tried.

12 pages

14 min read

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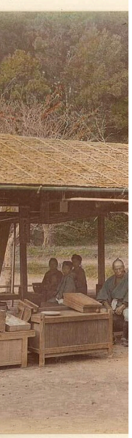
CONTENTS

What’s inside

LinkedIn is where they work.
Instagram is where they think.

B2B budgets go to LinkedIn by default, where the buyer is guarded, busy and expensive to reach. The same buyer spends evenings on Meta’s platforms in a different frame of mind, in an auction almost no B2B competitor has entered.



The off-duty executive

A managing director opens LinkedIn to check a candidate, answer a message and leave. She opens Instagram on the couch, at the airport and in the twenty minutes before sleep. Same person, different posture. On one platform she is filtering pitches; on the other she is open to an idea, provided it does not look like work.

The B2B Playbook makes the case that 95 percent of your market is not buying this quarter, and that the job is to be the name they already know when they are. Meta is the cheapest place to do that job, because the people bidding against you there are selling shoes, not software.

LINKEDIN · PROFESSIONAL CONTEXT

- → Analytical, guarded, time-boxed
- → Every B2B competitor is in the same auction
- → Right for the 5 percent in-market: job-title targeting, direct offers, sales follow-up

META · PERSONAL CONTEXT

- → Relaxed, browsing, receptive to narrative
- → Consumer advertisers set the price; B2B intent is rare and cheap
- → Right for the 95 percent: vision, point of view, a face they will recognise later

WHAT THIS BOOK IS NOT

A way to book demos from cold on a Sunday night. Nobody does that. It is a way to be known by the right two hundred people in your market for the price of a LinkedIn pilot, so that when they do search, ask a peer or take a call, yours is the name that comes up. The demo is booked later, on a weekday, by the retargeting sequence in chapter six.

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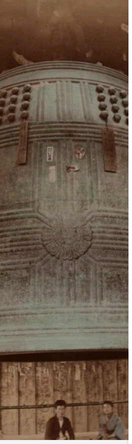


What changed in targeting

Most advice on “Facebook for B2B” was written for an ad platform that no longer exists. Since 2021 Meta has removed thousands of interest categories, lost most of its off-platform tracking on iPhones, and rebuilt its system around machine-learned audiences. The strategy in this book still works; the mechanics are different.

THEN	NOW
Stack interests like The Economist, Bloomberg and luxury watch brands to triangulate executives.	Many of those interests are gone or sparse. Stacking still works as a seed, but Meta expands past it by default (“Advantage detailed targeting”). Treat interests as a hint, not a fence.
Enrich your CRM with personal emails and phone numbers to raise match rates.	Buying personal contact data for people who did not give it to you is a privacy-law problem in Australia, the EU and the UK. Upload what you collected yourself, hashed, with consent. Match rates are lower; the audience is defensible.
Pixel everyone who visits the site and retarget them.	iOS tracking prompts gutted pixel audiences. Build retargeting pools from on-platform engagement instead: video viewers, Instagram profile engagers, lead-form openers. Meta always knows who watched its own video.
A 1 percent lookalike of your customer list is the best audience you can buy.	Lookalikes still exist but Meta’s Advantage+ audience, seeded with your list and left broad, usually beats them. The list tells the system who you want; the creative (chapter five) tells the buyer.

THE ONE-SENTENCE VERSION

Targeting has moved from the audience settings to the ad itself. You still choose who sees the first impression with seeds and lists; after that, the copy does the qualifying and Meta’s system does the finding.

Finding executives without job titles

Job-title targeting on Meta is thin: most people never fill in their employer, and those who do rarely update it. Instead, describe the person by how they live, then let the ad's first line do the rest.

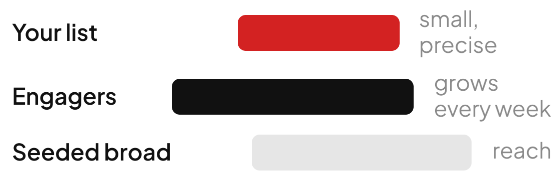
Seed with what survives. Business publications and finance interests where still available; "business decision-makers" and "business page admins" behaviours; Facebook Business Manager users. Small, but they set the direction.

Layer age and geography. 35 to 65, the metro areas and countries you actually sell to. This is the one filter that still works exactly as it says.

Leave expansion on. Meta will find people who behave like your seed. On a B2B budget, restricting it usually starves delivery and raises cost more than it improves fit.

Exclude who you must. Existing customers (unless the goal is expansion), staff, competitors' page engagers if you can identify them, and anyone who already converted.

FIG. 1 · THREE AUDIENCES, ONE CAMPAIGN



The broad set brings people in; the ad qualifies them; the engager pool collects them; the list and the pool get the direct offers.

PLACEMENTS

Instagram Feed, Reels and Stories, Facebook Feed and Reels. Turn off Audience Network and Messenger inbox: cheap, and not where your buyer is. Advantage+ placements are fine once creative is built for vertical.

Your own data

The most accurate audience on Meta is the one you bring. Every B2B company has three lists it is not using: customers, the pipeline, and the people who already engaged with its content on the platform.

Customer and CRM lists

Export emails and mobile numbers from the CRM; Meta hashes them in the browser before upload. Expect a 30 to 50 percent match on business emails. Segment: customers for exclusion or expansion, open opportunities for air cover during the sales cycle, closed-lost for the long game.

Engagement audiences

People who watched 50 percent or more of a video, engaged with the Instagram account, or opened a lead form in the last 90 to 365 days. Built entirely on-platform, so tracking changes do not touch them. This pool is the asset the whole campaign exists to grow.

Website and CAPI

Keep the pixel, but send events server-side too through the Conversions API. It recovers some of what browsers now block, and it is the only way to tell Meta which leads turned out to be qualified (chapter seven).

LOOKALIKES AND ADVANTAGE+

Use your best list (customers with the highest contract value, not all customers) as the seed. Try both a 1 percent lookalike and an Advantage+ audience seeded with the same list; in most accounts we run, the second wins on cost per qualified lead within a month. Keep whichever does.

CONSENT, IN ONE PARAGRAPH

Upload people who gave you their details and a privacy policy that says you may use them for advertising. Do not upload purchased lists or “enriched” personal emails. The Australian Privacy Act, GDPR and UK GDPR all treat that as a use the person did not agree to, and Meta’s own terms require you to have the right to share the data.

Creative that does the targeting

A whitepaper download interrupts someone's evening with homework. It fails on Meta, and it should. What works is content the executive would have stopped for anyway, which happens to come from you. Three patterns.

Name the reader in the first line. "For CEOs of manufacturing firms doing $10M to $50M." It costs you 90 percent of the audience and that is the point: Meta learns who stops, and the ones who do are yours. This is the targeting the settings can no longer do.

Sell the vision, not the feature. Not "cut invoice processing time 12 percent" but "why the finance teams that will look smart in 2027 are restructuring now". Off-duty, executives think about position, risk and legacy, not specifications.

A founder talking to a phone. Vertical, 30 to 60 seconds, one contrarian point, no logo sting. Polished production reads as an ad and gets skipped; a real person with an opinion reads as a post and gets watched. The B2B Playbook's founder-led chapter is the long version.

FIG. 2 · SAME OFFER, TWO OPENINGS

SKIPPED

Download our free guide: 7 ways to improve operational efficiency in 2026.

WATCHED

If you run a logistics business with more than 40 trucks, your biggest cost next year is not fuel. Here's the number nobody puts on the board deck.

HOW MANY ADS

Three to five at launch, all vertical video, all built around a different opinion. Replace the weakest each fortnight. Frequency above three a week to the same person is the signal the pool is exhausted or the creative is tired.

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The low–friction funnel

Nobody books a demo from a Reel on Saturday night. The first ad's job is to be watched; the second's is to be remembered; the third, served on a weekday, is the one that asks. Three steps, three audiences, one account.

1 · Watch
Seeded broad · any day

Founder video with a point of view. Objective: video views or engagement, not leads. Success is a 50 percent-view pool that grows every week at a cost you would pay for a good billboard.

2 · Remember
Engagers · any day

To people who watched: a case story, a customer's face, a second opinion from the founder. Soft conversion optional: a two-minute self-assessment or a calculator. Intent signal, no calendar.

3 · Ask
Engagers + list · Tue to Thu

Direct offer: a 20–minute call, a benchmark, an audit. Ad scheduling limited to working days; Facebook and Instagram Feed placements, where desktop use is highest. Native lead form (next page).

FIG. 3 · WHERE THE POOL COMES FROM, AND WHERE IT GOES

Seeded broad
Watches ≥50 % of a video

→

Engagement audience
365–day rolling pool

→

Weekday offer
Lead form → CRM → sales

WHY THE WEEKDAY MATTERS

The person who watched on a phone at 10 pm is the same person at a desk on Tuesday, and Meta serves to the person, not the device. Schedule step three for business hours and it lands in the frame of mind where diaries get opened. The first two steps run all week; the ask does not.

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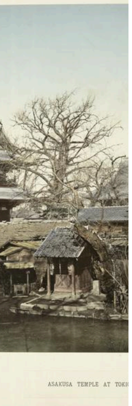


Lead forms and lead quality

Meta's native lead forms pre-fill name, email and phone and convert several times better than sending someone to a landing page. The cost is quality: they are so easy to submit that sales will get people who barely meant to. The fix is in the form and in what you send back to Meta.

"Higher intent" form type. Adds a review step before submit. Fewer leads, better ones.

One qualifying question, mandatory. Company revenue band, headcount, or role. Make it a multiple-choice with the disqualifying answer available; people self-select out.

Conditional logic. If the answer is under threshold, route to a "thanks, here is the guide" ending instead of the "we'll call you" one. Sales never sees them; Meta still learns from them.

Work email only. Turn off the pre-fill for email so they type it, and reject free-mail domains in the CRM.

Into the CRM in under five minutes. Native integration or a connector. A lead called back the same hour is a conversation; the same lead called on Thursday is a stranger.

TEACH META WHAT "GOOD" MEANS

Send qualified-lead and opportunity-created events back through the Conversions API from the CRM, and optimise the campaign for those, not for raw form submissions. It takes a few weeks and roughly fifty events to settle. Afterwards the system stops finding people who fill in forms and starts finding people who buy.

OR SEND THEM TO THE SITE

For high-value offers a landing page with a calendar embed still wins on quality. Build it to the Website Playbook's anatomy; expect a third of the leads at a higher cost, and a shorter sales cycle.

Budget, structure and measurement

This is a small-budget programme by design. The market you are trying to be known by is a few thousand people; the point is to reach them often, for months, without spending what a LinkedIn pilot costs in a fortnight.

Structure

One campaign per funnel step, three in total. Campaign budget optimisation on. One ad set per step (broad; engagers; engagers plus list). Three to five ads in each. Resist the urge to split by interest, city or persona; small ad sets never leave learning and cost more.

Split

Roughly 60 percent to step one, 25 to step two, 15 to step three. Step three is cheap because its audience is small and already warm; starving it is the commonest mistake. Revisit monthly as the engager pool grows.

MEASURE, IN THIS ORDER

Cost per qualified lead, from the CRM, not cost per form.

Size of the engagement pool and its weekly growth. The leading indicator.

Pipeline sourced or influenced, by asking “where did you hear of us” on every form and every first call.

Branded search volume in Search Console, month on month. Awareness shows up here first.

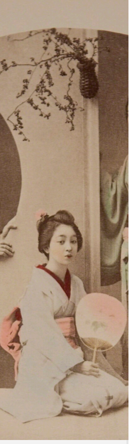
Frequency and 50 percent view rate as health checks, not goals.

DO NOT JUDGE IT IN WEEK TWO

Step three has nobody to talk to until step one has run for a month. Give the programme ninety days before deciding, and compare cost per qualified lead against LinkedIn over the same window. In our accounts it is usually a fraction, and the leads are bigger companies.

WHERE THE LEADS LAND

A lead from a founder video expects to talk to someone who sounds like the founder. Brief sales on the ad they saw. The B2B Playbook’s chapter on pipeline, not leads, is the handover.



The 90-day launch plan

Tick each item as it is done. Nothing in month two works until month one is complete.

MONTH ONE · BUILD

- [ ] Pixel and Conversions API installed and verified
- [ ] Customer and pipeline lists uploaded, hashed, consented
- [ ] Exclusions set: customers, staff, converters
- [ ] Five founder videos shot, vertical, one opinion each
- [ ] First line of every ad names the reader
- [ ] Step one live: seeded broad, video views

MONTH TWO · SEQUENCE

- [ ] Engagement audiences created: 50 % viewers, IG engagers, form openers
- [ ] Step two live: case story to engagers
- [ ] Lead form built: higher intent, one qualifier, conditional ending
- [ ] CRM integration tested end to end
- [ ] Step three live, Tuesday to Thursday, working hours
- [ ] Weakest ad replaced, fortnightly

MONTH THREE · LEARN

- [ ] Qualified-lead events flowing back via CAPI
- [ ] Step three optimised for qualified leads, not submissions
- [ ] Lookalike vs Advantage+ test concluded; loser paused
- [ ] “Where did you hear of us” on every form and first call
- [ ] Branded search volume recorded, month on month
- [ ] 90-day review: cost per qualified lead vs LinkedIn

MONTHLY BUDGET	ENGAGEMENT POOL, DAY 90	COST PER QUALIFIED LEAD
$ ______	______	$ ______

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FINAL WORD

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Be there when nobody else is.

Your competitors are bidding for the same executive, in the same suit, on the same platform, at the same price. She is also on her couch. Describe her by how she lives, say something worth stopping for, and ask on a Tuesday. It is not complicated. It is just not what everyone else does.

START HERE THIS WEEK

01

Record one 45-second vertical video: the founder, one contrarian opinion, the reader named in the first line.

02

Export your customer list and upload it, hashed, as a custom audience. Set it as an exclusion.

03

Launch step one at a budget you can ignore for a month. Watch the 50 percent view pool grow.

Want us to build the sequence?

Book a free strategy session →

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