

Instagram Ads Targeting Worksheet

Plan an Instagram ad audience on paper, with your controls, interest themes, custom audiences and a first test.

Meta treats most targeting settings as suggestions and only a few as hard limits. This worksheet puts every setting in the right place, turns your customer into interest themes and gives you a simple test plan, so the first campaign teaches you something.

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How to use this worksheet

Fill it in before you open Ads Manager, so the campaign is planned before you start building it.

- 1 **Describe the customer first.** The snapshot page keeps every later choice tied to real buyers.
- 2 **Sort each setting into controls or suggestions.** Controls are hard limits. Suggestions are where Meta starts.
- 3 **Brainstorm interests from the customer's world.** Start with what they buy and what they follow.
- 4 **Group interests into themes.** One theme describes one kind of customer.
- 5 **List the custom audiences you can build.** They are the strongest suggestions and the only way to exclude people.
- 6 **Plan one test.** Two audiences, the same ad and the same budget.
- 7 **Run the pre-launch checklist.** Then build the ad set.

CONTROLS FIRST

Anything that must be true, like your delivery area or keeping existing customers out, goes in audience controls. Meta treats everything else as a starting point.

Customer snapshot

One page on who buys from you. Every targeting choice should trace back to it.

QUESTION	YOUR ANSWER
Who buys from you, in one sentence	
Why they buy	
What almost stops them	
Where they live, or where you deliver	
Age range of most buyers	
Languages they use	
Anyone who must never see the ads	
What the ad asks them to do	

Controls and suggestions planner

Meta never delivers outside your controls. It starts with your suggestions and looks further when it expects better results.

SETTING	TYPE	YOUR CHOICE
Location	Control	
Minimum age	Control	
Languages	Control	
Excluded custom audiences	Control	
Age range	Suggestion	
Gender	Suggestion	
Interest theme	Suggestion	
Custom audiences	Suggestion	
Lookalike audiences	Suggestion	

EXCLUSIONS ONLY WORK AS CONTROLS

A customer list added as a suggestion points Meta toward people who already bought. To keep them out, add the list under excluded custom audiences.

Interest brainstorm

Write down what your customers already follow and do. Then check each idea in the detailed targeting box and tick the ones Meta offers.

BRANDS THEY BUY	WHAT THEY READ OR WATCH	TOOLS AND PRODUCTS THEY USE	HOBBIES AND ACTIVITIES

Interest themes

Group a few related interests into a theme that describes one kind of customer. Test themes, not single interests.

THEME	INTERESTS IN IT	ALL IN ADS MANAGER?	AUDIENCE ESTIMATE

Custom audience plan

Custom audiences are made of people who already know you. Use them as suggestions, as lookalike sources or as exclusions.

AUDIENCE	WHERE IT COMES FROM	USE IT AS	BUILT?
Website visitors	Meta pixel or Conversions API	Suggestion or exclusion	
Instagram engagers	Your Instagram account	Suggestion	
Video viewers	Your videos on Facebook or Instagram	Suggestion	
Customer list	Emails or phone numbers you upload	Exclusion or lookalike source	
Lookalike audience	A source audience you choose	Suggestion	

Test plan

- Change one thing per test, and keep the ad and the budget the same
- Aim for about 50 results per ad set in a week, which is roughly what Meta needs to leave the learning phase
- Leave the ad sets alone during the test, since big edits restart learning
- Pick the winner on cost per result, not clicks or reach

TEST	AUDIENCE A	AUDIENCE B	BUDGET EACH	WINNER AND WHY

Pre-launch checklist

- ☐ The campaign objective matches the result you want
- ☐ The location covers only the areas you serve
- ☐ A minimum age is set if the product needs one
- ☐ Existing customers are excluded in controls, if the campaign is for new customers
- ☐ One interest theme or custom audience is added as a suggestion
- ☐ Placements are chosen on purpose, all of them or Instagram only
- ☐ The estimated audience size isn't flagged as too narrow
- ☐ A Special Ad Category is declared if the ad is about housing, jobs, financial products or social issues
- ☐ The Meta pixel or Conversions API records the result you're optimizing for
- ☐ The test plan is written down before the ads go live

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