

Microsoft (Bing) Ads — Workbook

This workbook turns the course into a launched, measured Microsoft Advertising account. Work through one section per module: set up and import, build keywords and bids, layer LinkedIn and audience targeting, then measure and scale. The exercises, worksheets, and checklists are built to be done inside your real account, and the templates give you trackers you can keep using long after the course ends.

Why Microsoft Advertising, and Getting Set Up

Define your audience hypothesis, install UET, and import cleanly from Google Ads.

Exercise: Write your Microsoft buyer hypothesis

Before spending anything, write a one-paragraph hypothesis about who you reach on the Bing network and why they are worth buying. You will test this against conversion data later, so be specific about device, role, and decision stage.

- Who is my single ideal Microsoft Advertising buyer, described in one sentence including their likely device and job context?

- Which course-cited trait of the Bing audience (older, higher-income, corporate-desktop, DuckDuckGo privacy users) best matches my offer, and why?

- What is the one lower-CPL opportunity I expect to find here that I cannot get on Google?

Checklist: Pre-launch UET and conversion setup

- Created exactly one UET tag for my domain in Tools
- Placed the UET tag on every page, ideally via Google Tag Manager
- Verified the tag status reads Recording using the UET Tag Helper extension
- Defined at least one conversion goal (destination URL, event, or duration)
- Attached an estimated value to each conversion goal so reports show cost per acquisition
- Fired a test conversion and confirmed it appeared in the UI

Worksheet: Post-import correction log

Run the Import from Google Ads tool, then complete this worksheet 48 hours later with fresh eyes. Record the current state and the corrected state for each item so nothing the import got wrong slips through.

Import date

Sync policy chosen (one-time or scheduled)

Conversion tracking repointed to UET goals? (Y/N)

Imported bids reviewed and lowered for Bing CPCs? (Y/N)

Bid strategies re-confirmed per campaign? (Y/N)

Negative keyword lists and shared budgets audited? (Y/N)

Bing-unsupported features or irrelevant campaigns paused? (Y/N)

Date of 48-hour review reminder

Keywords, Match Types, and Smart Bidding

Build a tightly themed keyword engine and choose a bid strategy that matches your data maturity.

Worksheet: Ad group and keyword plan

Plan one tight, single-theme ad group at a time. Use the built-in Keyword Planner for Bing-specific volume and bids, and flag terms where you know Google competition is fierce as lower-CPL opportunities.

Ad group theme (one idea)

Exact-match keywords (square brackets)

Phrase-match keywords (quotation marks)

Broad-match keywords to test later

Negative keywords for this ad group

Bing monthly volume estimate

Suspected cheaper-than-Google? (Y/N)

Exercise: Diagnose a low Quality Score

Pick one ad group with a Quality Score of 6 or below. Use the three Microsoft inputs to diagnose the cause before you change anything, then make exactly one fix.

- Which of the three inputs is lowest: expected click-through rate, ad relevance, or landing-page experience?
 - If expected CTR is low, which two headlines will I rewrite around the keyword?
 - If ad relevance is low, how will I split this ad group into tighter themes?
 - If landing-page experience is low, what specific promise mismatch or speed issue will I fix?
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Exercise: Choose your starting bid strategy

Decide the right bid strategy for your current conversion volume, using the course guideline of roughly 15 to 30 conversions in 30 days before trusting Target CPA or Target ROAS.

- How many conversions did this account record in the last 30 days?
- Given that number, is manual CPC, Maximize Clicks, Maximize Conversions, Target CPA, or Target ROAS the honest starting choice?

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- What daily budget can I afford to lose for a full week while gathering data?
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- What is my trigger to graduate to a conversion-based strategy, stated as a specific conversion count?
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Checklist: Responsive search ad build

- Wrote 8 to 10 genuinely different headlines, not minor rewordings
- Included the primary keyword in two or three headlines
- Varied angles across price, proof, urgency, and benefit
- Avoided over-pinning so the testing engine has room to work
- Added sitelinks, callouts, structured snippets, and call extensions
- Reached an Ad Strength of Good or Excellent before setting live

Audience Targeting and the LinkedIn Advantage

Layer audiences in observation mode, then exploit Microsoft's exclusive LinkedIn targeting.

Worksheet: Audience observation tracker

Add each audience in observation (bid-only) mode first. After one to two weeks, record performance and decide on a bid adjustment before ever switching to targeting mode.

Audience name

Audience type (remarketing, in-market, similar, Customer Match)

Mode (observation or targeting)

Conversions in window

Cost per lead

Bid adjustment applied (%)

Decision (keep observing, adjust bid, switch to targeting)

Exercise: Design your LinkedIn targeting test

Plan how you will use Microsoft's exclusive LinkedIn company, industry, and job-function targeting without collapsing your reach. Start with one dimension in observation mode.

- Which single LinkedIn dimension will I start with: company, industry, or job function, and why that one?
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- Which specific industries or job functions map to my best customers?
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- What positive bid adjustment range (for example plus 20 to plus 50 percent) will I apply to converting segments?
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- What impression drop would tell me I have over-targeted and need to loosen back to bid-only?
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- Do I need a separate account-based campaign targeting named companies exclusively? List the target companies.
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Checklist: Bid adjustment discipline

- Pulled the dimension report and sorted by conversions and cost per lead, not clicks
- Confirmed each audience or LinkedIn segment is in the intended mode (observation vs targeting)
- Applied only one category of adjustment (device, location, schedule, demographics) this week
- Tested stronger desktop bids given Bing's desktop-heavy traffic
- Excluded regions I cannot serve and raised bids on regions that convert
- Recorded each change so next week's results are cleanly attributable

Measuring, Optimizing, and Scaling

Prove cost per lead, run a weekly pruning routine, and scale only the campaigns that win.

Worksheet: Weekly performance snapshot

Each week, export the core numbers per campaign and reconcile platform conversions against your CRM. Focus on cost per acquisition; treat click-through rate and impression share as diagnostics only.

Week ending

Campaign name

Spend

Conversions (platform)

Conversions (CRM)

Cost per acquisition

Conversion rate

One bid lever changed this week

Exercise: Reconcile your tracking

Before optimizing on cost per lead, prove your tracking is honest by comparing Microsoft's recorded conversions to your CRM or form-submission count for the same period.

- What is the platform conversion count versus the CRM lead count for the last 7 days?

- What is the percentage gap, and is it within the normal 10 to 20 percent cross-device range?

- If the gap is zero, one, or steadily growing, what part of the UET tag will I check first?

- What test conversion will I fire to confirm the goal still records correctly?

Exercise: Pick your scaling move

Identify campaigns that hit target cost per lead with budget to spare, then choose how to scale them along a dimension that is already working rather than just raising spend everywhere.

- Which campaigns are limited by budget yet still hit target cost per lead?

- Which proven ad group can I expand with new long-tail or close-variant keywords?

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- Which winning campaign can I duplicate into a new geography or LinkedIn segment?
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- Which automated rule (pause on cost-per-conversion breach, scheduled budget raise, email alert) will protect this scale-up?
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Checklist: Weekly 30-minute optimization routine

- Reviewed the search terms report and added irrelevant queries as negatives
- Promoted at least one cheap, converting search term to its own exact-match keyword
- Scanned Quality Scores and flagged any ad group at 6 or below
- Made exactly one bid adjustment justified by cost per lead
- Checked that automated rules and budget caps are still in place
- Exported the weekly report and noted the trend in cost per acquisition

Your Action Plan

1. Write your one-paragraph Microsoft buyer hypothesis and name the lower-CPL opportunity you expect to find.
2. Create one UET tag, place it via Google Tag Manager, and verify at least one valued conversion goal is Recording.
3. Run Import from Google Ads, choose a deliberate sync policy, and book a 48-hour post-import review.
4. Complete the post-import correction log: repoint conversions to UET, lower Bing bids, and audit negatives and budgets.
5. Build tightly themed ad groups and responsive search ads that reach Ad Strength Good or Excellent.
6. Choose a bid strategy that matches your conversion volume; start manual or Maximize Clicks until you have 15 to 30 conversions in 30 days.
7. Add audiences and one LinkedIn dimension in observation mode, then apply bid adjustments to segments that convert.
8. Reconcile platform conversions against your CRM and confirm your cost-per-lead numbers are trustworthy.
9. Run the weekly 30-minute routine: search terms, negatives, Quality Score checks, and one justified bid change.
10. Identify budget-limited winners that hit target cost per lead and scale them with budget, keywords, geographies, and automated rules.

