

Retargeting & Audience Nurturing — Workbook

This workbook turns the course into a working retargeting system. Section by section you will verify your tracking, inventory and segment your warm audiences, plan a sequential creative journey across Meta, Google, and LinkedIn, and stand up frequency, suppression, and measurement. Fill the worksheets and templates with your own numbers and leave every total, rate, and calculated cell blank until you work it out yourself — an empty cell beats a wrong one.

Tracking and Audience Foundations

Confirm your pixel and server-side tracking fire correctly and inventory every warm audience you already own.

Checklist: Tracking verification pre-flight

- Meta Pixel installed and firing on every page (confirmed with Meta Pixel Helper)
- Meta Conversions API live with shared event_id so purchases deduplicate (confirmed in Test Events)
- Meta Event Match Quality reads Good or Great on key events
- Google tag or GTM live, Enhanced Conversions on, conversions visible in Tag Assistant and GA4 DebugView
- LinkedIn Insight Tag status shows Active in Campaign Manager
- A consent banner is wired to the tag manager and Google Consent Mode v2 is configured for EEA traffic

Worksheet: Warm audience inventory

List every source of warm signal you already have so nothing retargetable goes unused. Complete one row per source.

Source name (e.g. cart abandoners, webinar registrants)

Type (website / platform engagement / CRM list / lookalike seed)

Platform(s) it can be built on (Meta / Google / LinkedIn)

Membership rule (URL, event, or list)

Estimated size

Above platform minimum? (Y / N / unknown)

Exercise: Map your funnel to warm signals

Using your own product, trace the path a buyer takes and mark where each warm signal is captured. Do this before building any audience.

- What are the 4 to 6 key steps in your funnel, from first touch to purchase?
- Which pixel event or page URL marks each step (e.g. /pricing view, add-to-cart, purchase)?

- Which steps also have a no-website signal you can use (video view, lead form, post engagement)?
- Which single CRM list will you use mainly for suppression rather than targeting, and why?

Segmenting Audiences by Window and Intent

Turn one warm pool into a ladder of non-overlapping audiences split by recency window and behaviour.

Worksheet: Recency window stack

Define your recency bands and the exclusion that makes each one non-overlapping. Fill one row per band.
Band name (e.g. 4 to 14 day product viewers)

Membership rule

Target audience duration (days)

Audience to exclude (the hotter, narrower band)

Temperature (hot / warm / cooling / cold)

Relative budget (high / medium / low)

Exercise: Build your intent-by-recency grid

Lay out the grid from the course (intent ladder rows, recency columns) and decide which cells you will actually run.

- List your intent ladder rows for your business (e.g. cart abandon, pricing view, feature view, blog read).
- List your recency columns (e.g. 0 to 3, 4 to 14, 15 to 30, 31 to 90 days).
- Which cells clear the platform size minimum and carry enough intent to be worth running?
- Which single cell is your hottest (most valuable), and what budget priority will it get?

Worksheet: Custom and matched list plan

Plan the first-party lists you will upload and how each is used. Complete one row per list.
List name

Platform (Meta Custom Audience / Google Customer Match / LinkedIn matched)

Use (target / suppress / lookalike seed)

Refresh cadence (manual date / auto-sync)

Matched size

Meets minimum to serve? (Y / N)

Checklist: Audience and overlap hygiene

- Each hotter band is excluded from the next colder band so a person sits in one cell
- Recent converters are excluded from every acquisition and mid-funnel audience
- Lookalikes are seeded from buyers or high-value customers, not all visitors
- Audience sizes were checked against platform minimums (Meta ~100, Google 100 Display / 1,000 Search, LinkedIn 300)
- The Meta Audience Overlap tool was used to spot pairs that share too many people

Sequential Creative and Cross-Platform Journeys

Plan a multi-touch creative journey that changes by stage and temperature and assign each platform its role.

Worksheet: Four-touch sequence plan

Plan the message for each touch in your sequence so each ad advances the story instead of repeating it. Fill one row per touch.

Touch number and role (reminder / proof / objection / offer)

Audience that sees it

Audience excluded (e.g. those who advanced or converted)

Core message or angle

Format (image / carousel / video / UGC)

Call to action

Exercise: Write three creative angles to test

Write three distinct ad concepts for the same offer so your refresh pipeline starts full and the algorithm has variety.

- Proof angle: which testimonial, result, or rating will you lead with, and what is the CTA?
 - Objection angle: what is the single biggest hesitation (price, risk, time), and how does the ad answer it?
 - Offer angle: what is the direct, time-bound call to action, and which hot cell gets an incentive?
 - Which platform gets each angle first (Meta visual, YouTube video, LinkedIn B2B), and why?
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Checklist: Cross-platform coordination

- The journey (stages, message per stage, offer) is defined once before any platform build
- Each stage is assigned to the platform best suited to deliver it
- Core value proposition, visual identity, and offer are consistent across all three platforms
- A shared frequency philosophy and staggered budgets prevent bombarding one person everywhere at once
- A creative refresh backlog of three or four ready concepts exists so refreshes never stall

Frequency, Suppression, and Measurement

Cap exposure, suppress the people who should stop seeing ads, and measure retargeting with more than last-click.

Worksheet: Frequency cap and suppression decisions

Record the cap and the suppression lists applied to each campaign so nothing is left uncapped or un-suppressed. Fill one row per campaign.

Campaign name

Audience temperature

Frequency cap (impressions per user per day or week)

Suppression lists applied (converters, customers, internal, etc.)

Upsell or win-back handled in a separate campaign? (Y / N)

Date frequency or suppression last reviewed

Exercise: Design a simple incrementality test

Plan a holdout test so you learn whether retargeting adds incremental sales rather than claiming credit for sales you would have made anyway.

- Which verifiable backend conversion event will you measure?

- What is your holdout (random percentage of the warm audience, or a matched set of regions)?

- How long must the test run to cover a full buying cycle and gather enough conversions?

- If the exposed group does not beat the holdout, what will you cut or change?

Checklist: Suppression and measurement discipline

- Recent purchasers are excluded from all acquisition and re-sell campaigns
- Existing customers are excluded from new-customer and free-trial offers
- Attribution windows are set deliberately and kept consistent week over week
- Click-through, view-through, and assisted conversions are reviewed together, not in isolation
- Platform-reported conversions are cross-checked against your own backend numbers

Your Action Plan

1. Install and verify pixel plus server-side tracking on Meta, Google, and LinkedIn, and wire consent before any pixel fires
2. Inventory every warm source you own (website, engagement, CRM, lookalike seeds) and note which clear platform minimums
3. Build recency bands (3, 14, 30, 90 day) and make them non-overlapping by excluding each hotter band from the next
4. Layer the intent ladder onto recency to form a grid, then activate only the cells with enough size and intent
5. Upload segmented CRM lists as Custom Audiences, Customer Match, and matched audiences for targeting and suppression

6. Seed one lookalike or similar audience from your buyers, not from all visitors
7. Plan and build a four-touch sequence (reminder, proof, objection, offer) and start each temperature at the right step
8. Set frequency caps per audience and use the Audience Overlap tool to remove campaigns competing with each other
9. Apply suppression lists (converters, existing customers, internal traffic) at the structure level so they cannot be forgotten
10. Set consistent attribution windows, review click, view-through, and assisted conversions together, and run a holdout test to confirm incremental lift before scaling

