

Free Platform Selection Worksheet

The Complete Framework for Choosing Between Facebook and Google Ads

A comprehensive decision-making tool from Navu Marketing

How to Use This Worksheet

This worksheet provides a systematic approach to choosing the right advertising platform for your business. Complete each section honestly and use the scoring system to make data-driven decisions rather than guessing or following generic advice.

Time Required: 30-45 minutes **Best Used:** Before starting any paid advertising or when evaluating current platform performance **Goal:** Clear recommendation on which platform to prioritize based on your specific business needs

Section 1: Business Profile Assessment

Your Business Information

Company Name: _____

Industry: _____

Primary Product/Service: _____

Target Market: B2B / B2C / Both (circle one)

Annual Revenue:

- ☐ Under \$500K
- ☐ \$500K - \$1M
- ☐ \$1M - \$5M
- ☐ \$5M - \$10M
- ☐ Over \$10M

Current Marketing Budget (Monthly): \$_____

Current Advertising Spend (Monthly): \$_____

Customer Profile

Average Customer Lifetime Value: \$_____

Average Order Value: \$_____



Typical Sales Cycle Length:

- ☐ Immediate (same day)
- ☐ Short (1-7 days)
- ☐ Medium (1-4 weeks)
- ☐ Long (1-3 months)
- ☐ Extended (3+ months)

Primary Customer Demographics:

- Age Range: _____
- Income Level: _____
- Geographic Location: _____
- Gender Split: _____

Section 2: Customer Journey Mapping

How Customers Find Solutions

When your ideal customer has the problem you solve, what do they typically do first?

- ☐ Search Google for specific solutions
- ☐ Ask friends/colleagues for recommendations
- ☐ Browse social media and discover options
- ☐ Visit websites they already know
- ☐ Call businesses directly
- ☐ Other: _____

Rate how often your customers use these discovery methods (1-5 scale):

Discovery Method	Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Always (5)
Google Search	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Media Browsing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Word of Mouth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct Website Visits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Purchase Urgency Assessment

How urgently do customers typically need your solution?

- ☐ Emergency (needed immediately)
- ☐ Urgent (needed within days)
- ☐ Important (needed within weeks)
- ☐ Planned (researched and scheduled)
- ☐ Aspirational (wanted but not essential)

What triggers the purchase decision?

- ☐ Specific problem occurred
- ☐ Regular maintenance/replacement cycle
- ☐ Budget became available
- ☐ Saw compelling offer
- ☐ Seasonal/event-driven need
- ☐ Competitor recommendation

Customer Research Behavior**How much research do customers typically do before purchasing?**

- ☐ Impulse purchase (little to no research)
- ☐ Quick comparison (under 1 hour research)
- ☐ Moderate research (1-5 hours)
- ☐ Extensive research (5+ hours)
- ☐ Committee/group decision process

Where do they conduct this research?

- ☐ Google search results
- ☐ Company websites
- ☐ Social media posts and reviews
- ☐ Industry publications
- ☐ Peer recommendations
- ☐ Professional networks

Section 3: Platform Fit Scoring System**Google Ads Fit Assessment**

Rate each statement for your business (1-5 scale): 1 = Strongly Disagree, 5 = Strongly Agree

Statement	1	2	3	4	5
Customers actively search when they need our solution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our service addresses emergency or urgent situations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We serve local/geographic markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our customers have high lifetime value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People search for specific terms related to our business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our sales process is consultative/professional	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We prefer direct, results-focused advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Google Ads Total Score: _____ / 35

Facebook/Meta Ads Fit Assessment

Rate each statement for your business (1-5 scale): 1 = *Strongly Disagree*, 5 = *Strongly Agree*

Statement	1	2	3	4	5
Our product/service is highly visual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We target broad consumer markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our customers make emotional/lifestyle-driven decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We can produce quality images/videos regularly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our target audience is active on social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand awareness is important for our business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have patience for longer sales cycles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Facebook/Meta Ads Total Score: _____ / 35

Platform Recommendation Based on Scores

If Google Ads score is 5+ points higher: Start with Google Ads **If Facebook/Meta score is 5+ points higher:** Start with Facebook/Meta Ads **If scores are within 4 points:** Use additional factors below to decide

Section 4: Resource and Capability Assessment

Budget Analysis

Current monthly advertising budget: \$_____

Minimum effective monthly spend per platform:

- Google Ads: \$2,000-\$3,000 minimum recommended

- Facebook/Meta Ads: \$1,000-\$2,000 minimum recommended

Can you commit adequate budget to one platform for 6 months?

- ☐ Yes, with room for optimization
- ☐ Yes, but budget is tight
- ☐ Maybe, depending on early results
- ☐ No, budget is too limited

Creative Resources

Rate your capability in each area (1-5 scale):

Creative Capability	Poor (1)	Fair (2)	Good (3)	Strong (4)	Excellent (5)
Writing compelling ad copy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating visual content (images)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Producing video content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Graphic design and layouts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Landing page creation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Google Ads Requirements: Strong copywriting (4+), basic design (2+) **Facebook/Meta**

Requirements: Strong visual/video (4+), consistent content production

Management Capacity

Who will manage your advertising campaigns?

- ☐ Internal team member (dedicated)
- ☐ Internal team member (part-time)
- ☐ External agency/freelancer
- ☐ Business owner (yourself)
- ☐ Undecided

How much time can you dedicate to campaign management weekly?

- ☐ 1-2 hours
- ☐ 3-5 hours
- ☐ 6-10 hours
- ☐ 10+ hours

Your experience level with paid advertising:






- ☐ Complete beginner

- ☐ Some experience with one platform
- ☐ Moderate experience with both platforms
- ☐ Advanced user of one platform
- ☐ Expert level with both platforms

Section 5: Competitive Landscape Analysis

Google Ads Competition

Search for your main 3-5 keywords and evaluate:

Keyword	# of Ads Showing	Competition Level (1-5)	Estimated CPC
_____	_____		\$_____
_____	_____		\$_____
_____	_____		\$_____
_____	_____		\$_____
_____	_____		\$_____

Average Competition Level: ____ / 5

Facebook/Meta Ads Competition

Research your top 3 competitors' Facebook ad activity:

Use Facebook Ad Library (facebook.com/ads/library) to research competitors:

Competitor	Currently Running Ads?	Ad Types	Estimated Frequency
_____	Yes / No	_____	_____
_____	Yes / No	_____	_____
_____	Yes / No	_____	_____

Market Saturation Assessment:

- ☐ Low (few competitors advertising)
- ☐ Medium (some competitive activity)
- ☐ High (heavy competitor advertising)
- ☐ Saturated (everyone is advertising)

Section 6: Business Goals and Priorities

Primary Advertising Objectives

Rank your top 3 goals (1 = highest priority):



Goal	Rank
Generate immediate sales/leads	_____
Build brand awareness	_____
Drive website traffic	_____
Compete with specific competitors	_____
Launch new product/service	_____
Expand to new geographic markets	_____
Increase market share	_____
Support seasonal promotions	_____

Success Metrics

What metrics matter most to your business?

Metric	Critical	Important	Nice to Have	Not Important
Cost per acquisition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Return on ad spend (ROAS)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand awareness metrics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Website traffic volume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lead quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales volume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Timeline and Expectations

When do you need to see results?

- ☐ Within 1 month
- ☐ Within 3 months
- ☐ Within 6 months
- ☐ 6+ months is acceptable

What constitutes success for you?

- ☐ Break-even on ad spend
 - ☐ 2:1 return on ad spend
 - ☐ 3:1 return on ad spend
 - ☐ 5:1+ return on ad spend
-

Section 7: Platform Decision Matrix



Scoring Summary

Transfer your scores from previous sections:

Assessment Category	Google Ads Score	Facebook/Meta Score
Platform Fit (Section 3)	____ / 35	____ / 35
Creative Resources (Section 4)	____ / 25	____ / 25
Competition Level (Section 5)	____ / 5	____ / 5
Goal Alignment (Section 6)	____ / 15	____ / 15
TOTAL SCORES	____ / 80	____ / 80

Goal Alignment Scoring Guide

For Google Ads, score high (4-5) if your top goals include:

- Generate immediate sales/leads
- Drive website traffic
- Compete with specific competitors
- Support seasonal promotions

For Facebook/Meta Ads, score high (4-5) if your top goals include:

- Build brand awareness
- Launch new product/service
- Expand to new geographic markets
- Increase market share

Creative Resources Scoring

Google Ads Creative Requirements:

- Writing compelling ad copy: ____ / 5
- Landing page creation: ____ / 5
- Basic design capability: ____ / 5
- **Google Creative Score:** ____ / 15

Facebook/Meta Creative Requirements:

- Creating visual content: ____ / 5

- Producing video content: ____ / 5
- Graphic design capability: ____ / 5
- **Facebook Creative Score:** ____ / 15

Competition Level Scoring

Google Ads Competition:

- Low competition (1-2): Score 5
- Medium competition (3): Score 3
- High competition (4-5): Score 1

Facebook/Meta Competition:

- Low saturation: Score 5
- Medium saturation: Score 3
- High saturation: Score 1

Section 8: Platform Recommendation

Primary Platform Recommendation

Based on your total scores:

If Google Ads score is 10+ points higher: ☒ Start with Google Ads

- Focus 100% effort and budget on Google Ads
- Master Google campaigns before considering expansion
- Timeline: 6-12 months to achieve proficiency

If Facebook/Meta score is 10+ points higher: ☒ Start with Facebook/Meta Ads

- Focus 100% effort and budget on Facebook/Meta
- Master social advertising before considering expansion
- Timeline: 6-12 months to achieve proficiency

If scores are within 10 points:  Use tie-breaker factors:

Tie-Breaker Decision Factors

Choose Google Ads if:

- ☐ You need results within 30-60 days
- ☐ You have limited creative production capacity
- ☐ Your customers actively search for solutions
- ☐ You prefer data-driven, logical optimization
- ☐ Your industry has clear search demand

Choose Facebook/Meta Ads if:

- ☐ You have strong visual content creation abilities
- ☐ You can wait 3-6 months for optimization
- ☐ Your product benefits from demonstration
- ☐ You're building a lifestyle or aspirational brand
- ☐ Your target audience is highly active on social media

Recommended Action Plan**Month 1-3: Foundation Phase**

- ☐ Set up campaigns on chosen platform
- ☐ Establish baseline performance metrics
- ☐ Complete initial optimization cycles
- ☐ Develop creative testing protocols

Month 4-6: Optimization Phase

- ☐ Refine targeting based on performance data
- ☐ Expand successful campaigns
- ☐ Optimize underperforming elements
- ☐ Build conversion tracking systems

Month 7-12: Mastery Phase

- ☐ Implement advanced optimization strategies
- ☐ Scale successful campaigns systematically
- ☐ Achieve predictable performance and ROI
- ☐ Document best practices and learnings

Year 2: Strategic Expansion

- ☐ Evaluate expansion to second platform
- ☐ Maintain excellence on primary platform
- ☐ Apply lessons learned to new platform testing
- ☐ Gradually shift budget based on performance

Section 9: Agency Evaluation Framework



Current Agency Assessment

If you're working with an agency, evaluate their platform recommendations:

Red Flags (Check any that apply):

- ☐ Recommended both platforms immediately
- ☐ Couldn't explain why they chose specific platforms
- ☐ Used generic "best practices" without business-specific analysis
- ☐ Platform recommendations coincidentally matched their service offerings
- ☐ Pressured you to "test everything" or adopt "omnichannel" approach
- ☐ Unable to provide specific success criteria for each platform
- ☐ Cross-platform attribution reports that seem too good to be true

Green Flags (Check any that apply):

- ☐ Asked detailed questions about your business model
- ☐ Recommended starting with one platform
- ☐ Provided specific reasoning for platform choice
- ☐ Discussed potential challenges and realistic timelines
- ☐ Focused on your business goals rather than their capabilities
- ☐ Recommended against platforms where they lacked expertise
- ☐ Provided clear measurement and optimization plans

Agency Interview Questions

If you're considering hiring an agency, ask these questions:

1. **"Why do you recommend [platform] specifically for our business?"**
 - Good answer: Specific reasons based on your customer journey and business model
 - Bad answer: Generic benefits or "best practices"
2. **"What would have to be true for the other platform to be better for us?"**
 - Good answer: Specific scenarios and business model differences
 - Bad answer: Inability to articulate or vague responses
3. **"How will you measure success on each platform independently?"**
 - Good answer: Platform-specific metrics and clear attribution methods
 - Bad answer: Cross-platform attribution that obscures individual performance

4. "What's your expertise level on the platform you're recommending?"

- Good answer: Specific experience, certifications, and results with similar businesses
- Bad answer: General experience or "we work with all platforms"

5. "How does adding a second platform impact the attention our account receives?"

- Good answer: Honest discussion of resource allocation and management complexity
 - Bad answer: Claims that more platforms don't reduce focus or quality
-

Section 10: Budget Allocation Worksheet

Single Platform Budget Planning

Recommended minimum monthly budgets:

Google Ads Budget Breakdown:

- Minimum monthly ad spend: \$2,000
- Management (if outsourced): \$750-\$1,500
- Landing page optimization: \$500-\$1,000 (one-time)
- **Total monthly investment:** \$3,250-\$4,500

Facebook/Meta Budget Breakdown:

- Minimum monthly ad spend: \$1,000
- Management (if outsourced): \$750-\$1,500
- Creative production: \$500-\$1,500/month
- **Total monthly investment:** \$2,250-\$4,000

Multi-Platform Budget Analysis

If considering both platforms (NOT recommended initially):

Split Budget Approach:

- Total available budget: \$_____
- Google Ads allocation (70%): \$_____
- Facebook/Meta allocation (30%): \$_____
- Combined management costs: \$_____

Warning: Split budgets typically deliver 30-50% lower ROI than focused approaches.

ROI Calculation Worksheet



Expected Performance Metrics:

Platform	Est. CPC	Est. Conversion Rate	Est. Cost Per Conversion	Break-even CPA
Google Ads	\$_____	_____%	\$_____	\$_____
Facebook/Meta	\$_____	_____%	\$_____	\$_____

Monthly ROI Projections:

Platform	Monthly Spend	Expected Conversions	Revenue Per Conversion	Expected Monthly Revenue
Google Ads	\$_____	_____	\$_____	\$_____
Facebook/Meta	\$_____	_____	\$_____	\$_____

Section 11: Implementation Checklist

Pre-Launch Setup

Account Setup:

- ☐ Business Manager/Google Ads account created
- ☐ Conversion tracking installed
- ☐ Analytics integration configured
- ☐ Audience lists uploaded (if available)

Creative Assets Prepared:

- ☐ Ad copy variations written
- ☐ Images/videos created and sized correctly
- ☐ Landing pages optimized for chosen platform
- ☐ Call-to-action buttons and forms tested

Campaign Structure Planned:

- ☐ Campaign objectives defined
- ☐ Audience targeting parameters set
- ☐ Bidding strategy selected
- ☐ Budget allocation determined

Launch Phase Checklist

Week 1:

- ☐ Launch initial campaigns
- ☐ Monitor for technical issues
- ☐ Verify conversion tracking
- ☐ Document baseline metrics

Week 2-4:

- ☐ Gather sufficient performance data
- ☐ Identify top-performing ads/audiences
- ☐ Pause underperforming elements
- ☐ Begin optimization tests

Optimization Schedule**Daily Tasks:**

- ☐ Monitor budget pacing
- ☐ Check for disapproved ads
- ☐ Review conversion data
- ☐ Respond to any technical issues

Weekly Tasks:

- ☐ Analyze performance by campaign
- ☐ Adjust budgets based on performance
- ☐ Launch new ad creative tests
- ☐ Review and optimize targeting

Monthly Tasks:

- ☐ Complete performance analysis
- ☐ Report on ROI and KPIs
- ☐ Plan next month's optimizations
- ☐ Evaluate expansion opportunities

Section 12: Success Measurement Framework**Key Performance Indicators (KPIs)****Primary KPIs (Track these regardless of platform):**

- Cost per acquisition (CPA): \$_____

- Return on ad spend (ROAS): _____:1
- Monthly lead/sales volume: _____
- Customer lifetime value: \$_____

Platform-Specific KPIs:

Google Ads:

- Cost per click (CPC): \$_____
- Click-through rate (CTR): _____%
- Quality Score: _____/10
- Search impression share: _____%

Facebook/Meta Ads:

- Cost per 1,000 impressions (CPM): \$_____
- Click-through rate (CTR): _____%
- Frequency: _____
- Relevance score: _____/10

Performance Benchmarks

Month 1 Goals:

- ☐ Campaigns launched successfully
- ☐ Conversion tracking verified
- ☐ Baseline performance established
- ☐ Technical issues resolved

Month 3 Goals:

- ☐ CPA within 150% of target
- ☐ ROAS of at least 1.5:1
- ☐ Campaign optimization systems in place
- ☐ Creative testing protocols established

Month 6 Goals:

- ☐ CPA at or below target
- ☐ ROAS of 3:1 or better
- ☐ Predictable scaling ability

☐ Platform mastery demonstrated



Month 12 Goals:

- ☐ Consistent positive ROI
 - ☐ Advanced optimization strategies implemented
 - ☐ Market share growth demonstrated
 - ☐ Ready for strategic expansion consideration
-

Your Platform Selection Summary

Recommended Platform: _____

Key Reasons:

1. _____
2. _____
3. _____

Timeline:

- Months 1-3: _____
- Months 4-6: _____
- Months 7-12: _____

Success Criteria:

- Month 1: _____
- Month 3: _____
- Month 6: _____
- Month 12: _____

Budget Allocation:

- Monthly ad spend: \$_____
- Management/optimization: \$_____
- Creative/content production: \$_____
- Total monthly investment: \$_____

Next Steps:

-
1.

 2.

 3.

-

Bonus: Agency Red Flags Checklist

► Immediate Red Flags (Find a new agency):

- ☐ Recommends all platforms without analysis
- ☐ Cannot explain platform selection reasoning
- ☐ Pushes cross-platform packages immediately
- ☐ Claims proprietary or "secret" optimization techniques
- ☐ Requires long-term contracts for platform management
- ☐ Cannot provide references for similar business types

⚠ Warning Signs (Ask tough questions):

- ☐ Generic strategy presentations
- ☐ Emphasis on vanity metrics over ROI
- ☐ Reluctance to provide transparent reporting
- ☐ Platform recommendations that match their certifications
- ☐ Pressure to increase budgets without performance justification
- ☐ Cross-platform attribution that seems overly favorable

✅ Positive Indicators (Good agency fit):

- ☐ Business-specific platform recommendations
- ☐ Clear explanation of platform selection criteria
- ☐ Focus on one platform mastery before expansion
- ☐ Transparent performance reporting
- ☐ Willingness to admit platform limitations
- ☐ Results-focused conversations over feature discussions

Additional Resources

Recommended Tools for Platform Research

Google Ads Research:

- Google Keyword Planner (keyword volume and CPC estimates)
- SEMrush or Ahrefs (competitor analysis)

- Google Trends (search trend analysis)

Facebook/Meta Research:

- Facebook Audience Insights (demographic analysis)
- Facebook Ad Library (competitor ad research)
- Social media analytics tools

Educational Resources

Google Ads Learning:

- Google Ads Help Center
- Google Skillshop (free certification courses)
- WordStream PPC University

Facebook/Meta Ads Learning:

- Facebook Blueprint (free certification courses)
- Meta Business Help Center
- Social Media Examiner resources

Need Help With Your Platform Decision?

This worksheet provides a comprehensive framework, but every business situation is unique. If you'd like personalized guidance on your platform selection decision, Navu offers **free Platform Selection Consultations**.

What's Included:

- Review of your completed worksheet
- Personalized platform recommendation
- Strategic implementation roadmap
- Direct consultation with our founders

No sales pressure. No generic recommendations. Just honest analysis based on your specific business needs.

Schedule your free consultation: [Click Here](#)

