

# Free Platform Selection Worksheet

## The Complete Framework for Choosing Between Facebook and Google Ads

*A comprehensive decision-making tool from Navu Marketing*

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### 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

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### 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"/>				
Social Media Browsing	<input type="radio"/>				
Word of Mouth	<input type="radio"/>				
Direct Website Visits	<input type="radio"/>				
Email Marketing	<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

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## 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

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Statement	1	2	3	4	5
Customers actively search when they need our solution	<input type="radio"/>				
Our service addresses emergency or urgent situations	<input type="radio"/>				
We serve local/geographic markets	<input type="radio"/>				
Our customers have high lifetime value	<input type="radio"/>				
People search for specific terms related to our business	<input type="radio"/>				
Our sales process is consultative/professional	<input type="radio"/>				
We prefer direct, results-focused advertising	<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"/>				
We target broad consumer markets	<input type="radio"/>				
Our customers make emotional/lifestyle-driven decisions	<input type="radio"/>				
We can produce quality images/videos regularly	<input type="radio"/>				
Our target audience is active on social media	<input type="radio"/>				
Brand awareness is important for our business	<input type="radio"/>				
We have patience for longer sales cycles	<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"/>				
Creating visual content (images)	<input type="radio"/>				
Producing video content	<input type="radio"/>				
Graphic design and layouts	<input type="radio"/>				
Landing page creation	<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
_____	_____	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	\$ _____
_____	_____	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	\$ _____
_____	_____	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	\$ _____
_____	_____	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	\$ _____
_____	_____	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	\$ _____

Average Competition Level: \_\_\_\_\_ / 5

### Facebook/Meta Ads Competition

Research your top 3 competitors' Facebook ad activity:

Use Facebook Ad Library ([facebook.com/ads/library](https://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
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## 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
<b>TOTAL SCORES</b>	<b>_____ / 80</b>	<b>_____ / 80</b>

### 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
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## 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

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## 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
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## 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

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## **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
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**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:**

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1.

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2.

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3.

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## 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
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## 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
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## **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](#)

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© 2025 Navu Marketing. This worksheet is designed to help businesses make informed advertising platform decisions based on their specific needs rather than generic industry advice.

