

THE NEXA SOLUTIONS

AI Automation · AI Agents · Websites · Digital Marketing

Paid Ads Budget Planning Sheet

A simple, fillable worksheet for allocating a first ad budget across channels — before you spend a single dollar.

A free worksheet from The Nexa Solutions · thanexasolutions.com

Plan Before You Spend

The most common paid ads mistake isn't picking the wrong platform — it's spreading a budget too thin across too many channels before any single one has enough spend to actually learn what works. This worksheet walks through setting a realistic goal, choosing where to focus first, and allocating a budget deliberately rather than evenly.

Fill this out before opening an ads account. If you're working with an agency or freelancer, this is exactly the input they need from you to build an effective first campaign.

A rule of thumb worth knowing

Most ad platforms need a minimum volume of spend and conversions before their algorithms optimize well — often a few weeks at a meaningful daily budget. Splitting a small budget across four channels usually means none of them ever reach that threshold.

SECTION 1

Total Budget & Goals

1. What's the total monthly budget available for paid ads?

Include ad spend only — platform fees or agency fees can be noted separately below.

2. What's the single primary goal for this spend?

e.g. leads for a sales team, direct e-commerce sales, app installs, brand awareness for a launch

3. What's a realistic target cost per result (per lead, per sale, per install)?

If you don't know yet, estimate from your average deal size and typical close rate — revisit after the first month of real data.

SECTION 2

Which Channels Fit Your Goal

Use this as a starting filter, not a rulebook — the right mix always depends on your specific audience and product.

Google Search	Capturing existing demand — people already searching for what you offer	\$1,000+/mo
Meta (Facebook/Instagram)	Building awareness and demand among a defined audience that isn't actively searching yet	\$500+/mo
LinkedIn	B2B targeting by job title, industry, or company size	\$1,500+/mo (higher CPCs)
Google Shopping / Performance Max	E-commerce with a product catalog	\$1,000+/mo
YouTube	Awareness and consideration through video, at lower cost per view than most platforms	\$500+/mo

A practical starting rule

With a limited first budget, pick one primary channel that matches your goal (see above) and put 70–80% of the budget there. Use the rest to test a secondary channel at a small scale, not to spread evenly across several.

SECTION 3

Your Budget Allocation

Fill in your actual planned allocation across channels.

Channel	% of Budget	\$ Amount	Primary Goal

Total (should equal your Section 1 budget):

SECTION 4

Cost Assumptions Per Channel

Estimate these before launch (use platform benchmark tools or industry averages), then come back and fill in the “Actual” column after your first few weeks of real data.

Channel	Est. CPC	Est. Conv. Rate	Est. Cost/Result	Actual (Week 4)

SECTION 5

Tracking Setup Checklist

Confirm each of these before spending a meaningful budget — untracked spend is money spent blind.

- ☐ Conversion tracking (pixel or conversion action) is installed and verified as firing correctly
- ☐ UTM parameters are added to every ad's destination URL for clean attribution in analytics
- ☐ A dedicated landing page exists for each campaign, matched to that campaign's specific offer
- ☐ Analytics (GA4 or equivalent) is connected to the ad platform for cross-referencing results
- ☐ A shared tracking sheet or dashboard exists for reviewing spend and results weekly

SECTION 6

Review & Reallocation Plan

4. How often will spend and results actually be reviewed?

Weekly is typical for a first campaign — daily is usually too soon to see meaningful patterns.

5. What result would trigger increasing budget on a channel?

e.g. "cost per lead under target for 2 consecutive weeks"

6. What result would trigger pausing or reallocating budget away from a channel?

e.g. "cost per lead more than 50% over target after 3 weeks of consistent spend"

SECTION 7

First 30/60/90 Day Plan

Milestone	What We Expect to Learn	Decision Point

How The Nexa Solutions can help

We plan, launch, and manage paid ad campaigns across Google, Meta, and LinkedIn for growing businesses — including the tracking setup most first campaigns skip. Visit thanexasolutions.com/contact to book a free consultation and walk through your completed worksheet.