



HOW TO TRACK AND VALIDATE WEBSITE SALES LEADS BY MARKETING CHANNEL

*A technical, step-by-step instruction manual to
dramatically improve lead generation marketing ROI.*

Faulty Online Lead Management Is Ruining Your Business — Here Is How To Fix It

If your company is like most, you base financial, marketing and conversion optimization decisions on seriously flawed conversion data. Does your company:

- 1. Track phone calls that originate from your website?**
- 2. Label ALL form and phone conversions from your website as web leads?**
- 3. Know the marketing source of EVERY form and phone conversion?**
- 4. VALIDATE web conversions to confirm they are, in fact, leads?**

How Did You Score?

If you answered no to ANY of these questions, please review this presentation carefully. It will enable you to:

- Accurately evaluate the ROI of your online marketing investment**
- Accurately determine how well online campaigns (SEO, PPC, etc.) are performing**
- More quickly and economically optimize campaigns to produce more and better sales leads**

Tracking Code Implementation

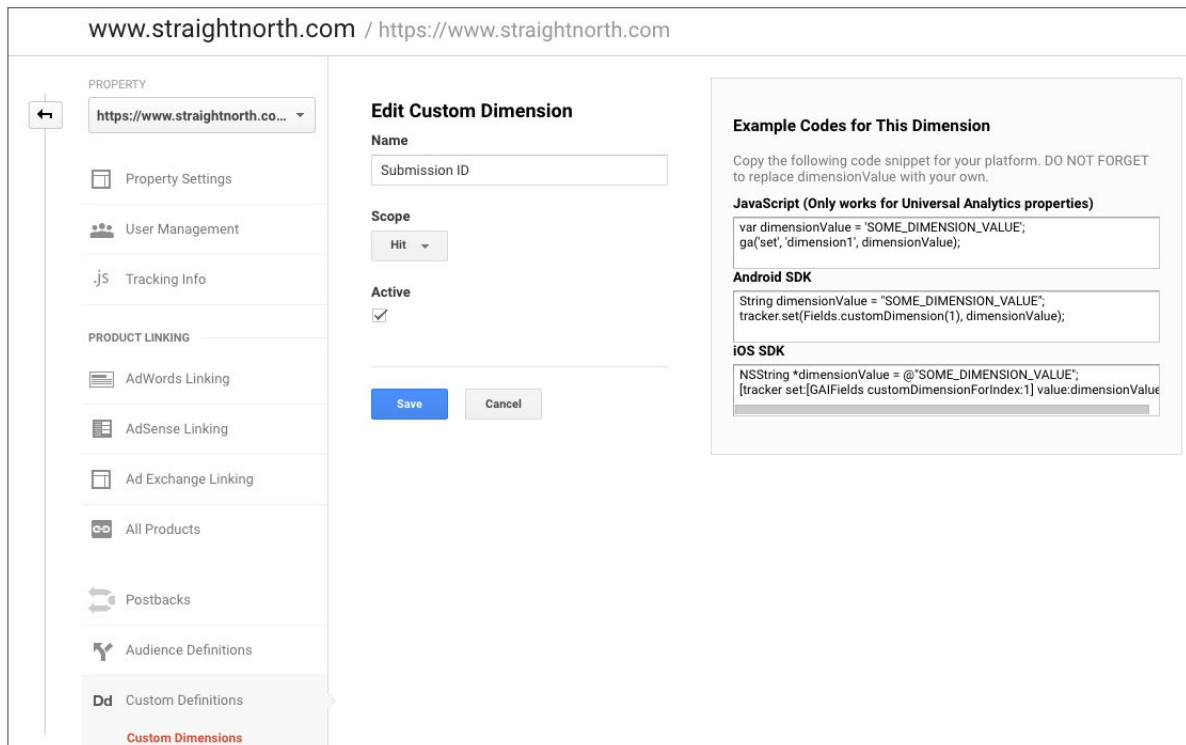
The first step is to have your web developer make modifications to your website so that you can properly track form submissions and phone calls back to a marketing channel.



Form Submissions

- 1. Confirm that the primary contact form on your website has a “Comments” field** and that it is a required field.
- 2. Confirm that your website is running Google Analytics.**
- 3. Confirm your website is running on a content management system (CMS) that stores each form submission in a table with a unique ID assigned to it.** Many content management systems do this by default, but it’s possible you’ll need to configure your website to make this happen. If your site does not store submissions in a database, a unique ID can be generated in a hidden field on the form and then sent along with the form submission email.
- 4. Modify your Google Analytics code** to pass the form submission ID to Google Analytics using a custom dimension.

- a. The first step requires configuring Google Analytics to hold a submission ID. You will do this by setting up a custom dimension from within your account dashboard. A custom dimension is data you feed into Google Analytics by modifying the Google Analytics tracking code on your website — this is data that Google Analytics does not automatically track. More info regarding setting up custom dimensions can be found here: <https://support.google.com/analytics/answer/2709829?hl=en>



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PROPERTY
[https://www.straightnorth.co...](#)

- Property Settings
- User Management
- Tracking Info

PRODUCT LINKING

- AdWords Linking
- AdSense Linking
- Ad Exchange Linking
- All Products
- Postbacks
- Audience Definitions
- Custom Definitions**

Edit Custom Dimension

Name

Scope

Active

Example Codes for This Dimension

Copy the following code snippet for your platform. DO NOT FORGET to replace dimensionValue with your own.

JavaScript (Only works for Universal Analytics properties)

```
var dimensionValue = "SOME_DIMENSION_VALUE";
ga('set', 'dimension1', dimensionValue);
```

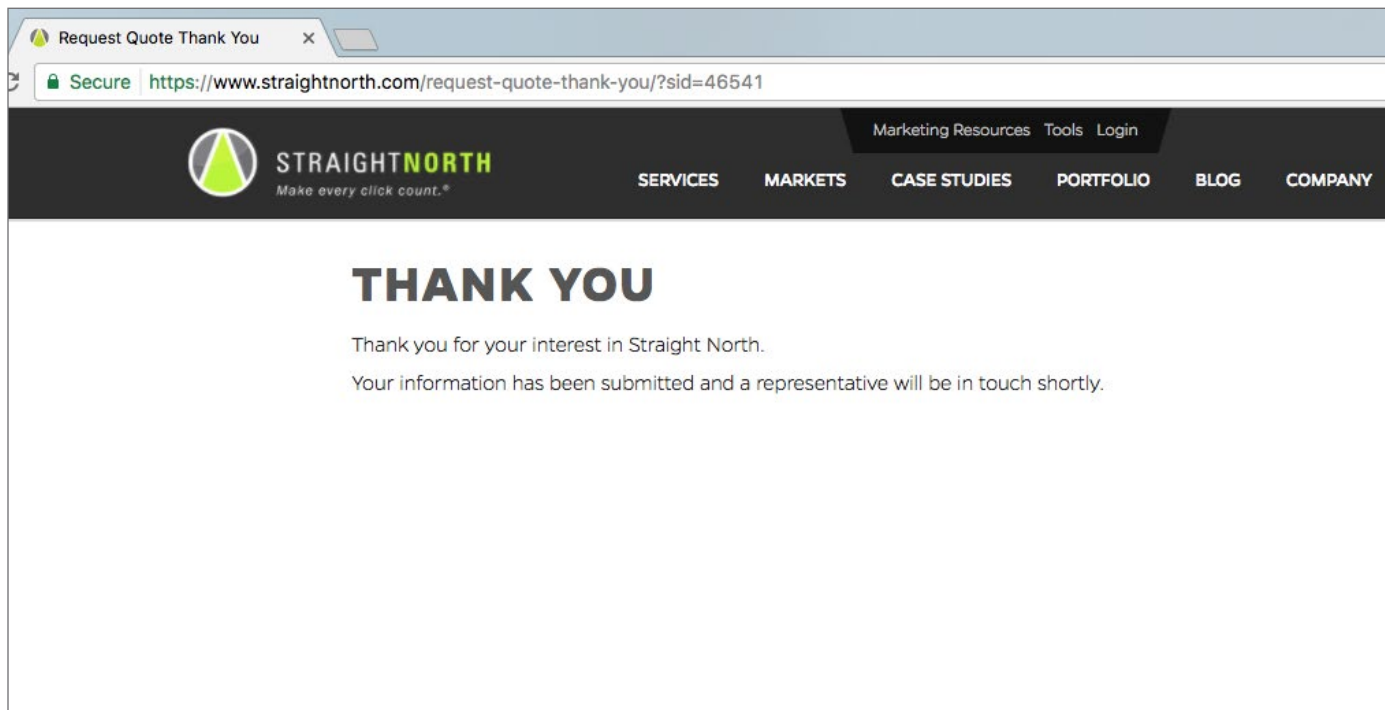
Android SDK

```
String dimensionValue = "SOME_DIMENSION_VALUE";
tracker.set(Fields.customDimension(1), dimensionValue);
```

iOS SDK

```
NSString *dimensionValue = @"SOME_DIMENSION_VALUE";
[tracker set:[GAIFields customDimensionForIndex:1] value:dimensionValue];
```

- b. After your custom dimension has been added, the next step is to send the submission ID from your website to Google Analytics. On the “Thank You” page of your form, you will need to modify your Google Analytics code to add the name of your custom dimension and your form submission ID. This relies on the submission ID being set as a variable on the “Thank You” page and then included in the GA code snippet. We recommend passing the submission ID in the URL to make it easily accessible. The result would look something like this: `domain.com/thank-you?submission=11111`



c. Update your GA code snippet to include a few new lines similar to this:

- `var dimensionValue = 'SUBMISSION_ID';`
- `ga('set', 'dimension1', dimensionValue);`

* SUBMISSION_ID will need to be replaced with the actual submission ID

d. Detailed instructions for modifying your Google Analytics code to send custom dimensions can be found here: <https://developers.google.com/analytics/devguides/collection/analyticsjs/custom-dims-mets>

```
110 <script type="text/javascript">
111 <!--//--><![CDATA[//><!--
112 (function(i,s,o,g,r,a,m){i["GoogleAnalyticsObject"]=r;i[r]=i[r]||function(){(i[r].q=i[r].q||
113 []).push(arguments)},i[r].l=1*new Date();a=s.createElement(o),m=s.getElementsByTagName(o)
114 [0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)})(window,document,"script","//www.google-
analytics.com/analytics.js","ga");ga("create", "UA-3930217-2",
{"cookieDomain":"auto"});ga("set", "dimension1", "46541");ga("send", "pageview");
113 //--><![ ]>
114 </script>
```

Phone Calls

1. Find a call tracking vendor that can track each phone call back to a specific marketing source.

Be sure to find a provider that:

- a. Generates an audio recording of tracked phone calls
- b. Provides a referral URL for each phone call (when one can be obtained)
- c. Includes the referral URL in downloaded spreadsheet reports
- d. Provides a dashboard that allows you to listen to each call and tag the calls (through a customizable dropdown or a text field)



2. Implement the call tracking vendor's code on your website to start tracking phone calls.

This will allow you to track marketing sources for your phone calls.

3. Your phone call vendor should be able to provide you with a single tracked phone number that you can hardcode on your website to replace your business phone number. This tracked phone number will forward all calls to your business phone number. This will allow you to track direct phone calls from visitors who found the phone number on your website, but didn't come through a marketing source.

Configuration

Once your lead tracking has been implemented and is working properly, the next step is to do some configuration to prepare for lead validation.



Form Submissions

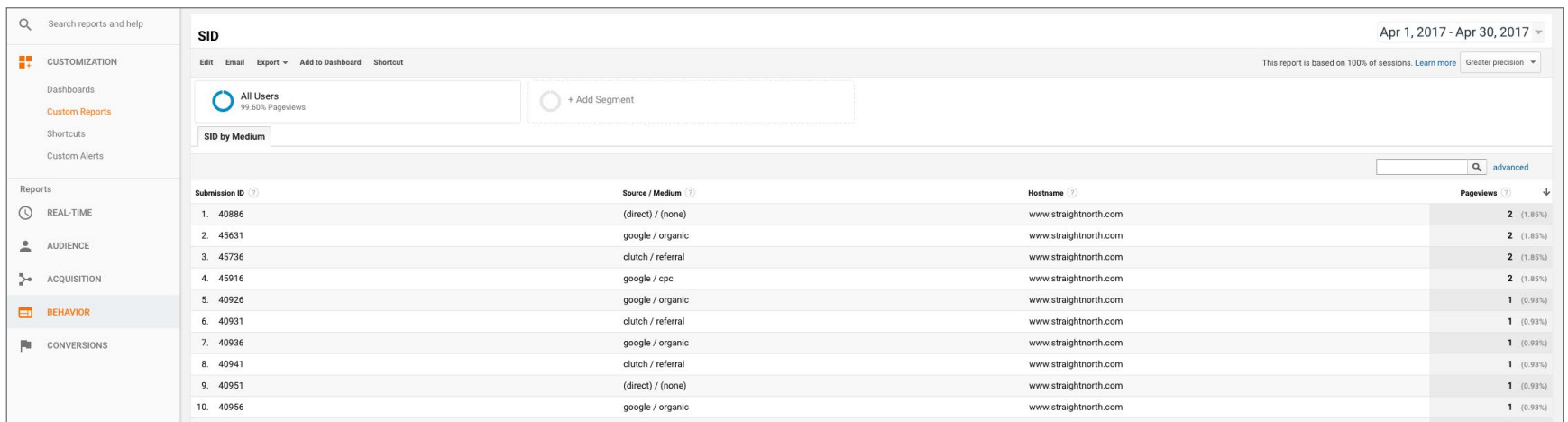
- 1. Log in** to your Google Analytics account.
- 2. Create a Custom Report** as follows:
 - a.** The first step is to click on the “Customization” tab in the upper left-hand corner of your Google Analytics account.
 - b.** The second step is to click on “+New Custom Report”.
 - c.** Once you are on the new custom report page, name the report. Do this by entering a value in the “Title” form field.
 - d.** Next, name the report content, you will do this by entering a value in the “Name” form field under the “Report Content” section.
 - e.** Next, select “Flat Table” from the list of three options for “Type”.
 - f.** Next, select the dimensions you want in this report. The dimensions to select are the following, in this order:
 - Submission ID
 - Source/Medium
 - Hostname
 - g.** Next, select the metric for the report; select “Pageviews”.

h. Next, add a filter to the report. The filter to create is:

- Select “Include” from the “Filters” dropdown.
- Once you select that, choose “Hostname” as the dimension for the filter.
- Once “Hostname” is selected, chose “Exact” from the dropdown menu directly next to the “Hostname” dimension.
- Next, in the open field directly to the right of “Exact”, enter your hostname (domain name — www.domain.com).

i. Once you have set up the filter in the report, you have an option to associate this new report with all views in your Google Analytics account or a select view.

j. Once you have selected your “Views” option, click “Save” and the report will be created.



The screenshot shows a Google Analytics report titled "SID" for the period "Apr 1, 2017 - Apr 30, 2017". The report is based on 100% of sessions. The table below shows the data for the report, sorted by Medium.

Submission ID	Source / Medium	Hostname	Pageviews
1. 40886	(direct) / (none)	www.straightnorth.com	2 (1.85%)
2. 45631	google / organic	www.straightnorth.com	2 (1.85%)
3. 45736	clutch / referral	www.straightnorth.com	2 (1.85%)
4. 45916	google / cpc	www.straightnorth.com	2 (1.85%)
5. 40926	google / organic	www.straightnorth.com	1 (0.93%)
6. 40931	clutch / referral	www.straightnorth.com	1 (0.93%)
7. 40936	google / organic	www.straightnorth.com	1 (0.93%)
8. 40941	clutch / referral	www.straightnorth.com	1 (0.93%)
9. 40951	(direct) / (none)	www.straightnorth.com	1 (0.93%)
10. 40956	google / organic	www.straightnorth.com	1 (0.93%)

- 3. Log in** to your website CMS.
- 4. Export your form submissions** into an Excel spreadsheet.
- 5. Open that Excel spreadsheet** and save this as your master form tracking spreadsheet.
- 6. Choose your start date** and remove the rows of data prior to your start date.
- 7. Add columns** to the beginning of the spreadsheet:
 - a. Lead
 - b. Source/Medium

	A	B	C	D	E	F	G	H	I	J
1	Lead	Source/Medium	Submission ID	Submission Date	IP Address	Name	Email	Phone	Website URL	Comments
2			4303	4/24/17	105.26.1.541	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
3			4304	4/24/17	236.458.45.2	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
4			4305	4/24/17	25.84.75.32	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
5			4306	4/25/17	954.325.125.262	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
6			4307	4/25/17	21.88.47.62	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
7			4308	4/26/17	524.36.8.1	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
8			4309	4/26/17	854.621.395.125	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
9			4310	4/26/17	95.64.85.12	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
10			4311	4/26/17	58.135.48.16	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
11			4312	4/27/17	465.13.79.4	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
12			4313	4/27/17	105.26.1.541	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
13			4314	4/28/17	236.458.45.2	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
14			4315	4/28/17	25.84.75.32	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
15			4316	4/28/17	954.325.125.22	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
16			4317	4/28/17	21.88.47.62	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
17			4318	4/28/17	524.36.8.1	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
18			4319	4/29/17	854.621.395.41	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
19			4320	4/29/17	95.64.85.12	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
20			4321	4/29/17	58.135.48.16	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information
21			4322	4/30/17	465.13.79.4	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with more information

Phone Calls

1. **Log in** to your call tracking provider’s dashboard.
2. **Navigate** to the screen where you can review each phone call.
3. **Listen** to each phone call and then tag the call as:
 - a. Yes = It is a sales lead (someone interested in the services/products that you sell)
 - b. No = It is not a sales lead

Campaigns		Calls		SPC Debug Report		Statements		Payments		Account		Beta Reports		
Keyword Summary Report				Keyword Debug Report		Keyword Detail Report		Call Detail Report						
Call Detail Report for 'Straight North - AccuTrack SPC'														
View Call Logs From 2017-04-1 To 2017-05-1 View														
Show all records Reset Filter Showing - 1 to 20 of 76 Export Call Details Export To XML View Recorded Calls														
Call Date	Trackable #	Incoming #	Destination #	Call Status	Duration (hh:mm:ss)	Dest. Route Type	Caller Zip	Caller State	Caller Timezone	Keyword	Raw Search	Source	Keyword Type	Custom1
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Answer	Above 0 Sec.	All	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	None	<input type="text"/>
05/19/2017 10:22	(855) 637-0909	7325600900	6308242181	ANSWER	00:01:19	default	08880	NJ	-5	Not Provided		www.forbes.com	Organic	Lead - Yes
05/19/2017 10:03	(855) 636-2660	4128253550	6308242181	ANSWER	00:02:23	default	15642	PA	-5	Not Provided		www.forbes-com.cdn.ampproject.org	Organic	Lead - Yes
05/19/2017 06:00	(855) 636-2571	2107744536	6308242181	ANSWER	00:01:25	default	78215	TX	-6	Not Provided		www.bluepay.com	Organic	Lead - Yes
05/18/2017 13:59	(855) 636-2660	4128253550	6308242181	ANSWER	00:01:07	default	15642	PA	-5	Not Provided		www.google.com	Organic	Lead - No
05/18/2017 13:57	(855) 625-0627	9735700730	6308242181	ANSWER	00:13:02	default	07416	NJ	-5	top seo companies		google	PPC	Lead - Yes

Reporting Validated Leads by Marketing Channel

Form Submissions

Using your master form tracking spreadsheet, you will now be able to report on the total number of form submissions that are validated leads. You will also know the marketing source for each validated lead.

Phone Calls

By logging in to your call tracking provider's dashboard and downloading the call data, you will now have a spreadsheet holding data on each call that was tracked along with the marketing source and your custom tag noting. By doing a sort based on your tag column, you will see all sales leads (marked "Yes") and all non-sales leads (marked "No").

FORM

	A	B	C	D	E	F	G	H	I	J
1	Lead	Source/Medium	Submission ID	Submission Date	IP Address	Name	Email	Phone	Website URL	Comments
2	Yes	Direct	4303	4/24/17	105.26.1.541	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
3	Yes	Organic	4304	4/24/17	236.458.45.2	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
4	No	Organic	4305	4/24/17	25.84.75.32	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
5	Yes	Referral	4306	4/25/17	954.325.125.262	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
6	No	Direct	4307	4/25/17	21.88.47.62	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
7	No	Direct	4308	4/26/17	524.36.8.1	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
8	Yes	Referral	4309	4/26/17	854.621.395.125	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
9	Yes	Organic	4310	4/26/17	95.64.85.12	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
10	Yes	Referral	4311	4/26/17	58.135.48.16	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
11	No	Referral	4312	4/27/17	465.13.79.4	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
12	Yes	Referral	4313	4/27/17	105.26.1.541	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
13	No	Direct	4314	4/28/17	236.458.45.2	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
14	No	Direct	4315	4/28/17	25.84.75.32	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
15	No	Referral	4316	4/28/17	954.325.125.22	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
16	No	Organic	4317	4/28/17	21.88.47.62	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
17	Yes	Organic	4318	4/28/17	524.36.8.1	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
18	No	Direct	4319	4/29/17	854.621.395.41	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
19	Yes	Organic	4320	4/29/17	95.64.85.12	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
20	No	Referral	4321	4/29/17	58.135.48.16	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
21	No	Direct	4322	4/30/17	465.13.79.4	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r
22	Yes	Direct	4323	4/30/17	21.88.47.62	Prospect Name	prospect@gmail.com	888-888-8888	http://www.domain.com	Please call me with r

PHONE

	A	B	C	D	E	F	G
1	Lead	Caller Date/Time	Call Duration	Call Type	Caller Zip	Caller State	Message
2	Yes	5/19/17 10:22	0:01:19	Organic	8880	NJ	ANSWER
3	Yes	5/19/17 10:03	0:02:23	Organic	15642	PA	ANSWER
4	Yes	5/19/17 6:00	0:01:25	Organic	78215	TX	ANSWER
5	No	5/18/17 13:59	0:01:07	Organic	15642	PA	ANSWER
6	Yes	5/18/17 13:57	0:13:02	PPC	7416	NJ	ANSWER
7	Yes	5/18/17 12:44	0:00:30	Organic	L7E 5S1	ON	ANSWER
8	No	5/18/17 12:38	0:00:48	Organic	15642	PA	ANSWER
9	No	5/17/17 18:17	0:00:24	Organic	91505	CA	ANSWER
10	No	5/17/17 14:37	0:00:49	PPC	33394	FL	ANSWER



MATT CANNON
DIRECTOR OF WEB SERVICES

After studying Mechanical Engineering at Southern Illinois University, Matt followed his passion for Internet technology, joining Whoast Inc. to oversee project management and client services. As Straight North's Director of Web Services, he manages all web development activities, making sure that current development standards and techniques are applied to every project.

When away from the computer, Matt follows the Chicago Bulls, Bears, Cubs and all forms of domestic and international soccer with the same enthusiasm he puts into his work.

ABOUT STRAIGHT NORTH

Straight North is an Internet marketing agency that helps growth-minded firms generate online sales leads and e-commerce revenue. With an in-house team of over 100 full-time marketers, we have the depth and breadth to manage complex, multifront campaigns that deliver continuously improving results.

Services include SEO, PPC, display advertising, email marketing and responsive websites.

www.straightnorth.com