

Breaking Down Silos to Get the Metrics You Need

Making informed decisions about marketing activities requires information about which marketing activities are turning into leads and sales. Of course, many activities contribute toward leads and sales, so untangling the influences is an involved process.

This information is owned by many groups, from IT through marketing and sales. It takes an interdisciplinary perspective to collect and interpret data. It's a rare organization in which the marketing department already has great data about which of their efforts influences sales and revenue.

Precisely because this is so rare, we believe connecting the dots between your online marketing efforts and sales builds incredible competitive advantage. We walk you through which information is critical to building a feedback loop and why so that you can unlock the key to more sales!

Do More Than Gather Data: Build a Team

We're going to get into the nitty-gritty of the setup and configuration of all sorts of tools and systems to track your data, to connect the dots between marketing and sales. But, proper setup and reporting is just the beginning. Data capture is not understanding; reporting is not analysis.

A customer relationship management (CRM) system does not replace talented salespeople following a consistent process, but it can support them and ease communications between team members. After the initial setup and configuration, only about 20% of your metrics process should be spent generating reports. The other 80% should be analysis and reflection.

A truly comprehensive web analytics program usually requires the participation of multiple groups within the business. The most common obstacle to successful analytics is not technology (as most businesses predict) but rather cross-team integration.

Web Analytics: Types, Purpose, Popular Tools for Each

Now that you've defined your goals and decided which key performance indicators (KPIs) you will measure as part of your metrics-driven marketing practice, it's time to make sure your website is capturing the information you need for decision making.

Knowing how your website will help your business leads to defining which actions you want visitors to take on your website. This describes which actions you need to watch carefully, and should point out key reports you should monitor and key attributes of the website you should emphasize.

Several tools are available to watch your website and its constituent pages and gather aggregate and individual-level data on website visitors and usage patterns. We start with tools suited to websites and pages, logfile and web analytics programs, and then move to page-level and element-level monitoring programs, such as form analytics.

Don't fall into the perfectionist/data quality trap. Web analysts and business users alike, online and at conferences, are known to trade arguments against web analytics programs on the accuracy of data collected, citing numerous technical reasons that prevent tracking.

However, web statistics are still by far the most measurable and accurate source of marketing data available! So, data that is pretty good is much better for decision making in the absence of data.

Logfile Versus Script-Based Analytics Tracking

There are a couple methods to gather data on what your website visitors do on your website: through server logfiles, which record every file request and visit; and through script-based tracking, available through web analytics software services such as Google Analytics, Yahoo! Web Analytics, Adobe SiteCatalyst (formerly Omniture), and others.

One of the main differences between logfile analysis and script-based web analytics programs is the type of data they can gather and the relative ease of access and reporting.

Logfile Analysis: Deep, Less Accessible

Web server logfiles record the files requested by each visitor to the website. Essentially, the web server “logs” every request, including information such as the file requested, the date, and whether the request was successful.

Because the logfiles record data regardless of whether the visitor has cookies enabled, data on visits by search engine spiders is recorded in logfiles, and not recorded in analytics programs. Logfiles usually require a request to the IT team to pull the files from the web server and then IT team time for the analysis.

Logfiles can be more or less information rich, depending on the server’s configuration. The extended log format described in Table 4.1 captures critical information, such as referring URL and user agent (whether it is a spider, a human visitor, or so on).

To get the most out of your logfiles, make sure you have the extended format recording. This data is small enough to store, and not retrievable retrospectively; grab the data while you can, you never know when or why you’ll need it!

Table 4.1 W3C Extended Logfile Format

Field	Description
Date	The date when the activity occurred.
Time	The time, in coordinated Universal Time (UTC), at which the activity occurred.
Time Taken	Duration of time to complete the transaction, in seconds.
Bytes	Size of information transferred, in bytes.
Cached	Indicates whether the cache was used, with 0 indicating no cache access.
Client IP Address	The IP address of the client that made the request.
User Name	The name of the authenticated user who accessed the server. In the case of an anonymous user, this field contains a hyphen.

Table 4.1 Continued

Field	Description
Server IP Address	The IP address of the web server.
Server Port	The server port number on the web server.
Method	The requested action, for example GET.
URI Stem	The target of the action, for example Default.htm.
URI Query	The query, if any, that the client was trying to perform. A universal resource identifier (URI) query is necessary only for dynamic pages.
HTTP Status	The Hypertext Transfer Protocol (HTTP) status code.
User Agent	The browser type that the client used.
Protocol Status	The substatus error code.

Sample Logfile The following is a sample logfile:

```
#Version: 1.0
#Date: 20101119
#Fields: date time cs-method cs-uri
20101119 00:19:15 GET /index.html
20101119 01:57:45 GET /products/index.html
20101119 02:32:12 GET /index.html
20101119 02:32:19 GET /images/image.jpg
```

An upside of logfiles is their completeness; a downside is their format. They are a big long text file recording server transactions.

Imagine staring at the green screen of characters that flowed across the screen in the *Matrix* movies. For those of us without the ability to stare into streams of text data and recognize repeating patterns or without programming skills, logfiles remain difficult to access and use.

Some tools can be used to review and report on logfile data, such as Sawmill, but they are trickier to use and configure than the premade dashboards ready-to-go in web analytics data.

Another difference is timeliness of the data. Logfiles provide a great way to retrospectively review large quantities of web data. Yet, logfile analysis tends to be something done at some frequency (annually, quarterly, monthly), but typically is not done on a daily basis. Although web analytics programs tend to have a several-hour lag, and so by definition are not “real time,” they do provide ongoing reporting on an almost-immediate basis.

Web Analytics: Information Rich Dashboard

Web analytics programs, such as Google Analytics, Urchin, Yahoo! Web Analytics, Omniture SiteCatalyst, and others, provide a wealth of data about visitor behavior on your website. They typically do this through running scripts on pages of the website and storing cookies on the visitor's computer. These cookies are how they distinguish whether the visitor is a new or a returning one, and which page views are part of the same session on the website.

Data on visitors who have cookies disabled, and this includes many kinds of robots and search engine spiders, does not get captured in script-based analytics programs. This information is captured by logfiles.

Google Analytics is widespread and well priced (for example, free after the installation and configuration labor) and is what we use on our website and recommend our clients use. It is the main software and dashboard we reference throughout this book, although many of its features and reports are available within other web analytics packages.

Website analytics packages

- Enable you to set and track specific business goals
- Allow you to compare present data directly to past
- Give you deep demographic insight into users
- Compare website effectiveness by locale
- Visualize funnels
- Show how users maneuver through your website
- Integrate fully with other Internet marketing campaigns, such as AdWords
- Customize your view of data
- Overlay important statistics on the page
- Set up automated report emails and alerts
- Let you export report data
- Allow you to customize access to accounts by user
- Allow you to set intermediate website goals

They do not show you

- Real-time statistics
- Data that corresponds exactly to server data

Who's Out There? Define Your Visitors Web analytics lets you see and monitor trends in the real-world attributes of your visitors such as their location, their primary language, whether they are new to your website or a returning visitor, and what operating system, browser, and screen dimensions they're using.

Analytics cannot tell you anything about the people who are not visiting your website, but you can examine who is coming and check whether you are capturing the right audience.

Metrics tracked about visitors include number of visits, number of unique visitors, location, language, and whether the visitor is new or a returning visitor. Some analytics programs get a little deeper with some basic demographic information.

For instance, Yahoo! Web Analytics does include some demographic data about your visitors, including gender, age, and Yahoo!-specific selections such as interest groups and Yahoo! pages frequented by your visitors (see Figure 4.1). They know this demographic information because some people have shared this kind of data with Yahoo! already and opted in that it can be shared in an aggregate way with users of Yahoo! products, such as its Web Analytics.

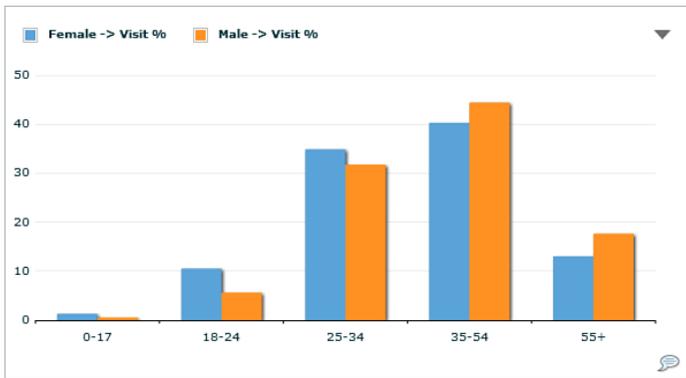


Figure 4.1 Age and gender report from Yahoo! Web Analytics.

Use the data about your website visitors to assess whether you're reaching your target customers. Are they from the locations (see Figure 4.2) and languages (see Figure 4.3) you expect? Do the demographics match your goals? If not, you might need to adjust the marketing you're doing to reach folks not yet included in your website visitors.



Figure 4.2 Map overlay showing locations of website visitors.

	Language	None	Visits ↓	Pages/Visit	Avg. Time on Site	% New Visits	Bounce Rate
1.	en-us		373,073	2.33	00:00:46	94.51%	54.51%
2.	ja		2,708	3.78	00:03:31	70.61%	46.20%
3.	de		2,549	3.05	00:02:27	79.13%	50.49%
4.	fr		2,160	3.44	00:02:46	78.94%	46.48%
5.	zh-cn		1,698	3.44	00:03:37	73.85%	42.82%
6.	en		1,456	1.85	00:01:14	80.63%	68.89%
7.	en-gb		1,226	2.64	00:02:19	74.80%	48.86%
8.	es		1,027	3.23	00:02:50	78.09%	49.66%
9.	pt-br		1,012	2.86	00:02:50	81.23%	47.04%
10.	ko		966	2.47	00:01:20	41.10%	70.39%

Figure 4.3 List of languages of website visitors.

You might possibly find the inverse is true, that folks you didn't anticipate serving are using your website and even becoming leads or making purchases. Use the information in your web analytics to challenge your current definition of a target customer.

For instance, your web analytics may reveal demand for services and demand for translated content in new countries and languages. You might need to fill in more details about the target customer through outreach and interviews, but analytics can give you a place to start.

You can test whether your website is loading and displaying correctly to most of your visitors. Analytics provides you with a ranking of the screen sizes, browser versions, and operating systems used to view your website. You can review how your website looks under all combinations of these criteria to make sure your website is accessible and useful for popular combinations.

If you do not have all of the requisite hardware and software for seeing your website under all the common conditions seen in your web analytics, you can use a service like CrossBrowserTesting.com that shows you how your website looks on each hardware/software combination you choose.

If you've been building out content to attract and retain new visitors, you might want to track progress by measuring changes in Visitor Loyalty, Recency, Length, and Depth of Visit. Yet, a quick visit that results in a lead or a sale should still be considered a successful one, so be careful about assumptions about these statistics in complete isolation from your goals.

How Did They Get Here? Much of the data for managing and optimizing your campaigns will come to you in the Traffic Sources area of your web analytics dashboard (see Figure 4.4). We track sources or channels such as the following:

- **Direct Traffic:** People who come directly to your website via a bookmark.
- **Paid Search:** People who come to your website through clicking a sponsored search link on a search engine page or on another website that features contextual advertising through AdWords or MSN/Yahoo!
- **Organic Search:** People who come to your website through clicking a natural search result.
- **Referral Sites:** Other websites that send visitors to your website not included in other categories.
- **Banner Ads:** Incoming links from banner ads can be tagged to be distinguished in your web analytics.
- **Email Marketing:** Incoming links from email campaigns can be tagged to be distinguished in your web analytics.
- **Paid Directories:** Paid directories such as online yellow pages.

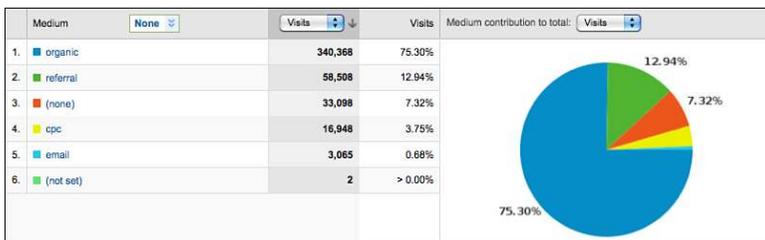


Figure 4.4 Visits by marketing channel: (none) is direct visitors, cpc is paid search.

For the paid and organic search sources, you can dig deeper into the paid and organic keywords that are driving traffic to your website. In addition, you can link Google Analytics to your AdWords account to provide deeper cross-dashboard reporting.

The questions you can answer with data in the traffic dashboard allow you to qualify and better understand your audience. You can see how they're reaching your website and the keywords they used to find you, which gives a clear indication of their intention and goal. You might find surprising things in your keyword lists, and change your search engine optimization (SEO), paid search, or referral strategies based on traffic source data.

For instance, you might notice you have high visibility on surprising terms. At one point, one of the authors noticed she got a lot of organic traffic on a surprising term to her blog, and it turned out she had misspelled the word and ranked high for the misspelling. Apparently, other people also misspelled the term similarly and so found her in searches. She didn't want to appear on the misspelling (although sometimes that's advantageous), so in this case, she used information about organic traffic to correct an on-page typo!

You can also look at the balance of incoming traffic channels and how they perform relative to each other. This may show you which initiatives are paying off, and which attract interest but result in few leads or sales.

This relative contribution to lead or sale generation may allow you to make decisions on relative budget allocation (but see the section on lead attribution later in this chapter before doing anything drastic). For instance, if you are getting qualified leads at a good price through paid search advertising, you may consider shifting budget from a less-well-performing email campaign.

Your list of referring websites may turn up some great performers that could do even better with a little investment of time to build a relationship or build out your content on their website.

Analyze your visitor's expectations by examining search terms. Do the search terms you see surprise you? Do they match the major themes on your website? Are any relevant terms proving ineffective in conversion rates? Are these terms specific enough? Are there keyword variations that are vital to your website focus that are not showing up?

And then, use your findings as input to SEO and paid search optimization. You can insert valuable terms into your page copy, <meta> tags, page titles, and URLs whenever possible. Then, delete ineffective keywords from your paid search campaigns, and add valuable words unique to organic search.

ADVANCED TRAFFIC CONFIGURATION: TAGGING INCOMING LINKS

To provide insight across online marketing efforts, tag all marketing inlinks to the website in a way that can be captured by the web analytics program in use. What follows are descriptions of tags we find particularly useful: Campaign Name, Medium, Source, and Content tags, each of which is discussed here.

These recommendations can be used in conjunction with the link building tool provided by Google (www.google.com/support/googleanalytics/bin/answer.py?answer=55578):

- **Campaign Name (utm_campaign):** The marketing-level effort that takes place across delivery media (i.e., a mainframe campaign message that is delivered via radio, magazine, and booth expo).
- **Medium (utm_medium):** The type of delivery channel, such as a magazine, radio, or search engine. Common Medium tags are “organic,” cpc, referral and (none). In addition to these, socialmedia, email and pressrelease will be useful. Others, such as article, directory, partner, etc., could also be considered, depending on their importance, frequency of use, and the level of detail (and complexity) you’re comfortable with.
- **Source (utm_source):** The specific place where the visitor originated. So, in the medium magazine, the sources could be *The Economist* or *Time*. In the medium organic, the sources could be Bing or Google. In the medium socialmedia, the sources could be Twitter, Facebook, or LinkedIn among many others.
- **Content (utm_content):** Lastly, you may want to include a unique identifier associated with certain efforts, such as the release date of an email or press release.

When tagging incoming links, you might trick the search engines into thinking there are extra copies of your pages available. For example, a web crawler could find a page through an untagged link, and then find it again through a link with Analytics tags appended to the URL, like this:

www.example.com/mypage.html

www.example.com/mypage.html?utm_source=globenewswire&utm_medium=pressrelease&utm_content=july2011&utm_campaign=getreadyfor2012

Although these two URLs return the same page, the search engine might view them as separate, thereby “diluting” the organic strength of the page. This issue is already addressed to some degree by maintaining a complete and accurate sitemap.xml file to guide the web crawlers, but it doesn’t hurt to take the following precaution.

To avoid this duplication, employ the canonical `<link>` tag (`<link rel="canonical" href="INSERT-CANONICAL-URL-HERE"/>`) in the `<head>` section of the page being linked to, to tell web crawlers to ignore the analytics parameters, and index *only* the canonical URL (in the case above, the shorter one!). This extra tagging will help address potential duplicate content concerns.

What Did They Engage With on My Website? You can approach your web analytics data by focusing on content performance, using data on pages viewed, navigation patterns, exit pages, and bounces to identify and address usability issues with specific pages or sections within the website. You can delve into which pages are working to convert visitors to leads and which are not.

Additional insights can be gleaned from reviewing on-site search logs (where you can see what your visitors were searching for in their own words). This data can be pulled into your web analytics program quite easily by configuring your on-site search to follow the conventions needed for tracking by your web analytics program.

You can also track events, such as counting the number of times a video was played on a website.

What Actions Did They Take? Translate your website goals into measurable attributes, and then make sure your analytics program measures them! Within web analytics programs, you can set up specific pages as goals and monitor goal funnels, the paths to these goals.

By monitoring goals and measuring progress toward them, you can drill into conversion rates and abandonment points. Many tracking pitfalls in goal setup are covered in the section “Choosing a Contact Method” in Chapter 3, “Building a Metrics-Driven Practice.”

On a lead-generation website, an important path is from website contents to the contact or request a quote form, and then completing the form. Figure 4.5 shows a typical drop off of only a small proportion of people who search for the website and view the contact form, actually electing to fill it out.

For an e-commerce website, examining the path from viewing a product page to checking out is critical! Figure 4.6 shows the path from shopping basket to sale for an e-commerce website. In these cases, the biggest drop-off is from filling the basket to buying its contents. We all understand this, because shopping baskets are often used to hold items under consideration.

Watching these metrics gives clues into the broken places on your website, within your shopping cart, or in your request for quote process.



Figure 4.5 Sample lead-generation conversion funnel.

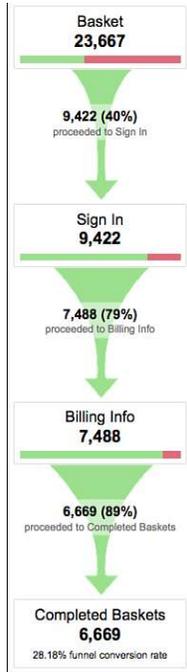


Figure 4.6 The funnel from shopping basket to confirmed sale.

Take a Hybrid Approach to Get the Best of Both Worlds

Each method has its own strengths.

You might choose to review logfile data when

- You need to analyze the website's performance for a prior period.
- You have server space to keep the logfiles going back in time.
- You have specific ideas for how you want to mine the data and want full control over how you segment it.
- You are comfortable programming.

Web analytics dashboards are best when

- Multiple people in your company, organization, and so on will need to analyze the data, each with different needs.
- You have limited time to spend analyzing the data.
- You want the data for the present onward (no past analysis).
- You prefer to use a web interface whenever you can.

When a visitor interacts with a website, both the web server and the visitor's browser track information about the session. So, you can record data in logfiles and have a script-based web analytics program running concurrently.

We recommend this combination, analytics for common use, and logfiles to dig more deeply into questions less easily addressed in web analytics (such as average load times and information about individual visits, such as clickpaths through the website).

Click Analytics

Specialized scripts are available to fill in where web analytics has less resolution, such as the mechanics of an individual page. Vendors such as CrazyEgg and ClickTale provide scripts that watch behavior on individual pages, summarizing aggregate click or mouse movement patterns.

ClickTale also has form analytics to identify which form fields stymie visitors. UserFly goes further by providing visualization and playback of an individual visitor's interaction with one or several pages on the website. These additional tools let you drill into parts of your website and can help you diagnose and fix issues you turn up with web analytics or logfile analysis.

Call Tracking: Why It's Essential and How to Select Granularity Needed

Just as you need to capture web form data and connect it to marketing initiatives, if your business lives by the phone ringing, you need to ensure your phone calls get tracked with the same rigor. Make sure you know whether phone inquiries are up or down, where those phone calls originate, and whether the phone calls are from qualified or unqualified prospects.

Fewer calls from qualified prospects is better than more, worse calls, though too many qualified calls is a great problem to have. Make sure you're logging the data you need to pick these trends out.

Business-to-business (B2B) lead-generation websites and B2B and business-to-consumer (B2C) e-commerce websites can use custom tracking phone numbers to identify the source of each call.

Measuring If the Phone Rings (Memory Doesn't Count)

Are your marketing initiatives driving phone calls? Hard to tell if you aren't counting calls before, during, and after marketing campaigns. CRM systems can provide your customer contact team a place to log phone calls and provide you with dashboards to measure the call volume.

Companies that live by their phone calls may engage with call centers to handle incoming calls professionally and predictably, and these contact management companies will provide standard call count and other metrics for analysis.

It could be as simple as a shared spreadsheet where you tally the number of phone calls and the number of qualified callers. You might engage with a company such as RingCentral that gives you a virtual call center that routes calls to your land lines and provides you with reporting summarizing call count, call length, and other attributes. Or, it could be as automated as a shared dashboard populated by web analytics, phone tracking data, and call center daily reporting.

It is obvious to many that call tracking is the next frontier of metrics-driven advertising on the Internet. New players are emerging, and existing powerhouses are adding new features to support call tracking. One new player is Mongoose Metrics. An existing powerhouse, Google, is also offering solutions.

Google AdWords features "click to call" phone numbers in paid search ads that will be tallied along with clicks and lead conversions in your AdWords dashboard. Plus you can track calls from Google Places listings (discussed in more detail in the "Increase Your Findability via Local Search and Link Building" section in Chapter 8 "It's All About Visibility").

We're happy to say that call analytics are getting deeper and more integrated with existing dashboards, and by the time you are reading this, the call-tracking services available to you will be even better than they are at the time of this writing.

Interpreting trends in your call data gets easier once you have more than a year of data by which to gauge seasonal trends. Maybe calls always crash right before the Fourth of July in the United States, or maybe they go up.

In addition, staffing to provide quality customer service is expensive. So, you need to verify that the calls you are receiving are ones you want! You cannot do this without tracking the number of calls, their sources, and the outcomes.

Selecting the Granularity Needed

Table 4.2 illustrates different ways that you can use to set up custom toll-free phone lines to track your website prospects or customers. Depending on the complexity of your sales process and your business's needs, you can apply the most basic solution, an extremely complex custom solution, or something in between.

Table 4.2 Custom Call to Action Methods, from Simple to Complex

Level of Complexity	What It Entails
Basic (web versus nonweb calls)	A separate toll-free 800 number just for the website, identifying website prospects from offline prospects.
Medium (landing pages versus website)	Multiple email addresses and toll-free numbers for different paid search landing pages (each with its own phone number).
Complex (identify callers by market channel)	Dynamically insert 800 numbers using JavaScript for each marketing channel directing traffic to the website, using a tool from Mongoose Metrics or Who's Calling. Costs depend on your call volume as well as the number of phone numbers required.
Very complex (identify callers by keyphrase)	Dynamically insert 800 numbers using a JavaScript for each person that lands on each page, using a tool from Mongoose Metrics or Who's Calling, that provides custom phone numbers letting you see calls resulting from individual keyphrases. This approach increases your paid search fund by about 10%, so you need to have a solid business reason to justify this level of granularity.

WHEN CALLING GETS COMPLEX

You might wonder how to handle all of this additional data tracking when you've also got a call center to manage in your business model. One client of ours outsources initial follow-up on web form inquiries and fields all incoming calls from marketing activities to a call center. We exchange data with the center daily. They pull our daily web counts into their daily reporting. Our website data helps them project staffing needs as well.

Lead Management: SFA/CRM Integration

Get ready for some acronyms....

Sales force automation (SFA) and customer relationship management (CRM) systems provide shared contact logging and lead tracking for sales and customer contact staff. They provide the functionality behind a call center knowing you called 24 hours previously and can provide status on your request even if you are talking to a different agent.

CRM systems are used for

- **Communication:** In all directions and across different disciplines. They allow tech support people insight into the history of an account, and give the sales team insight into the activities or issues that have come up. When used well, they can reduce phone/email clutter for individual team members and make information easier to locate for all.
- **Reporting:** Data can be analyzed to review individual leads in detail and to show pipeline health and leading indicators for revenue forecasts.
- **Common format:** CRM systems provide common format across all global regions and sales managers, crucial for international organizations.
- **Accountability:** CRM systems share status on opportunities and spotlight any information gaps.

CRM Products

A commonly used SFA/CRM system is Salesforce.com. This is the CRM we use ourselves and that we tend to see our clients use. Its use and gaining buy-in on its use is a book unto itself. *Salesforce.com: Secrets of Success*, by David Taber, from Prentice Hall, provides a comprehensive reference and how-to guide to the political and technical dimensions of implementing Salesforce.com.

Beyond Salesforce.com, there are many SFA/CRM systems that range from streamlined services for small businesses to more feature-rich services for enterprise clients. On the small business end, 37Signals's Highrise and KarmaCRM provide contact and task management.

For enterprise situations, NetSuite, Plex (a Pure Visibility client), Applicor, and SAP include back-office functions such as accounting and enterprise resource management (ERP).

Marketing automation is another category that includes CRM. So, a leads database might be included in your marketing automation software, such as Marketo, Eloqua, or SilverPop. And these systems may be layered on top of each other, with a marketing automation system CRM holding leads until they are nurtured to a state where they belong within the sales team's CRM.

We will not recommend any vendor (no vendor is suitable for all situations), and likely the market will mature in the time between this writing and your reading. Nor will we advocate for CRM sitting within or outside of your ERP or marketing automation system. We're agnostic, as long as the integration is in place to get the reporting you need.

CRM Basics

The CRM is designed to support your marketing and sales process. Just like web analytics or logfiles won't give you a web strategy, neither will CRM data give you a sales strategy or a sales process.

What it will do, if you provide it with the right inputs, is help your team identify which marketing channels, and perhaps which tactics within these channels, are providing you quality leads, letting you refine your activities to gain more of the good leads that turn into sales and fewer of the ones that waste your team's time in follow-up and quotes that do not produce revenue.

We recommend that you plan your marketing and sales process to include tracking such as you can find within marketing automation software, which you can create within a standalone system or purchase out of the box. For our purposes, we focus on how to track your Internet marketing campaigns through from a lead to a sale. Leads from your website should flow into your CRM and data on sales should percolate back into marketing for informed decision making.

Sounds easy, right?

Required Input: Web Form Lead Data

CRM systems can integrate with your website so that web form submissions flow directly (without needing any rekeying) into the system by which your company is

already tracking and monitoring leads and follow-up activities. This should be relatively straightforward; most CRM systems enable you to receive data from your web forms as part of their basic offering.

Required Input: Phone Inquiry Data

For many businesses, the website may generate as many as two to three times the phone inquiries than it does web leads. Without capturing data from phone inquiries in your CRM, and without capturing the marketing channel data with the phone inquiry, you might be leaving as much as 66% to 75% of your lead data “on the table” untracked. Call data is every bit as important as web form data and deserves the same treatment.

Required Input: Marketing Channel Data

CRM basic templates should require lead and contact records to include information about whether your lead originated as a phone call or a web form completion, and maybe even which web form/offer or which phone number. Get beyond the basics to capture the original source of the web visit or phone call.

Do this for web leads by capturing information about how the visitor came to your website and including it with the user-entered data during a website form submission. Do this for phone calls by custom phone numbers. Did they call from the website? A refer-a-friend email?

The short version of how this is done for website form submissions is through tracking parameters attached to the URL links used for different marketing activities. These tracking parameters can be stored in a cookie or otherwise maintained as the visitor peruses the website and then be submitted at the same time as the web form.

Next Steps for Follow-Up

What happens once the web or phone lead data hits your database, from a process perspective, is the interesting part. Ideally, as visitors return to your website or call again for additional information, perhaps signing up for a whitepaper or webinar, their additional activities should be added to or merged with their original contact details.

This lets your team develop an understanding of which marketing channels drive which types of on-site behavior and which resources on the website prime prospects’ interest and which support late-stage inquiries.

Whatever your process, whether you have your call center follow up on web form leads with a callback within 11 minutes or you commit to getting back to a visitor

by email within 24 or 48 hours or within the month via Pony Express courier... the follow-up activities and contact with your prospect should be logged within your CRM.

Lead Scoring

If you're in the enviable situation of being buried in leads and having to sort through to prioritize follow-up activities, you might turn to lead scoring. Your sales team probably is already doing this, either by gut or using a more overt method.

You can use your CRM to automate lead scoring based on attributes of the lead itself such as whether the business is on a target customer list or has revenues above a certain threshold, and based on on-site behavior (number of whitepapers downloaded, attendance at a webinar) you have identified as good signals of a warm prospect.

Lead Nurturing

Marketing does not stop after you have gained someone's contact information. That's just the start of a relationship. People need more time, more information, and a deeper connection with your company to make a purchase.

To grow a relationship over time, consider lead-nurturing activities such as the following:

- Email autoresponder mini-courses.
- Ongoing email marketing newsletters.
- Invitations to local events.
- Invitations to online demos or webinars.
- Initiating and maintaining a relationship with prospects via social media services like LinkedIn, Facebook, or Twitter, depending on what is suitable for your industry or outreach team.
- Maintaining prospects' interest through publishing new and relevant information in the form of a blog on your website or in a forum that attracts your prospects.
- Keeping your company top of mind to people who have already visited your website or expressed interest through remarketing. AdWords and other paid search and display ad vendors offer remarketing programs, where you can show targeted ads to people who have already visited your website or performed a specific action on your website (such as filled out a contact form or downloaded a whitepaper).

Next Steps for Analysis: Quantifying “Assists” Through Lead Attribution

You’ve got data. Now what? What if your analysis turns up that the only sales are coming from searches on your trademark and then you justify a decision to end all banner advertising and paid search on nontrademark terms? Well... you might decide that based on the data, and you might accidentally throttle your sales pipeline and eliminate all incoming leads on trademark queries.

You see, it might be the generalized queries that stimulate the relationships that turn into sales via trademark search terms only after a few months of lead nurturing and exploration.

At its best, lead attribution takes into account different information needs along a complex sales cycle. At its worst, it can be used to prop up underperforming marketing initiatives by claiming they are “assisting” the better performers.

Only a thoughtful hypothesis-driven strategy can separate the alternatives.

Last Click

The basic scenario just described might result in a last-click attribution model, where the last action the user took before a sale would receive the “credit” for the sale. Suppose, for instance, that someone is shopping for winter boots and searches on the term “snow boots” or “winter boots” coming up with some general options browsing through a bunch of e-commerce websites.

In the search shown in Figure 4.7, the person might click a few paid search ads, review the visually prominent product search listings, and maybe browse a few favorite online shoe stores like Zappos or outdoor stores like REI.

Then, after deciding on a particular pair of Sorels, and knowing they’ll get a good price and a good return policy at Zappos, they might go back to Zappos.com via typing the web address into the browser address bar, navigate to the boots, and the credit for the sale might go to a direct visit.

This scenario omits the history and ignores the fact that the person remembered they liked Zappos at all because they saw it in organic or sponsored search results before making the purchasing decision.

While purchasing a pair of shoes is a B2C example, we also see this happening in B2B situations. Before making a final decision on a large B2B purchase, the person invests a lot of time researching products: clicking both ads and organic search listings. The buyer might attend a webinar, download whitepapers, or watch product demos online.

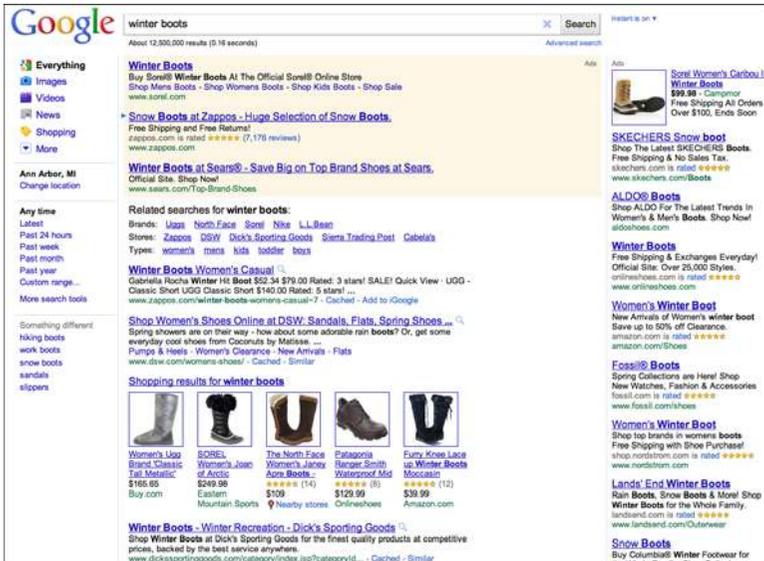


Figure 4.7 Google results page for “winter boots.”

When a final decision is made, the buyer often just clicks an ad with the company’s brand name instead of typing the company’s URL in his or her browser. This last click on the ad gets credit for the final sale.

First Click

An alternative to last-click scenarios is to give 100% of the credit for the sale to the first click. If the buyer ends up buying at Zappos, regardless of the medium that facilitated the visit that produced the sale, the first trip to Zappos would get credit for the sale.

In this scenario, perhaps the first visit sets a cookie on the person’s computer capturing the search terms (if it was search) and the medium used to find the website. This cookie might then be cleared when the purchase is made, or it might persist for a long time, giving credit for the winter boots purchase to the search done for baby booties for a baby shower in some other season.

Limitations of this scenario are that the first click might be in a different browser on the same computer or a different device altogether (think work computer, home computer, smartphone, tablet computer... the list goes on), so your data may be imperfect, but even imperfect first-click attribution might provide better insight into leading influencers than last-click attribution.

Hybrid Approach: Count Assists!

In a lead-generation environment, the search and the decision might be drawn out over time, and there might be several website conversion events that support a sale. It would still be possible to give only the last click credit for the sale, or only the first click credit, but of course that's more clearly an oversimplification than in the two e-commerce examples just discussed.

You might weight the contributions of all touchpoints along the sales cycle, from the first web form submission to download of a whitepaper, through the webinar sign-ups, and then on to the request a quote form submissions that results in a proposal and contract.

But, how to take into account offline media? You might weight the contributions of all “in market” advertising that could possibly have supported the contact. So, a form submission during a month when you're also doing a direct mail piece, a billboard, and a promotion with an industry thought leader might give partial credit to the medium that produced the contact form submission, an assist to the billboard, the thought leader promo, and the direct mail piece.

As you can imagine, the possibilities are endless. And, it might be possible to construct a model that does not reflect the reality of your lead generation but instead reflects a political reality inside your organization. This is the dark side of lead attribution.

Our recommendation? Start simple. Test through adding and eliminating online and offline visibility and monitoring the results. If your sales cycle is long, you might want to run concurrent tests in different geographies (billboards in Tucson, direct mail in Detroit, banners in New York) to evaluate contributions of different activities.

A Case Study in Lead Management

In February 2010, an IT services provider installed scripts to capture online marketing data when a visitor submits a web form through their website. This particular system is “first in;” that is, it identifies the sources that the visitor used to reach the website the first time, even if the visitor submits the form after subsequent visits. This allows a clear link between the earliest introduction of visitors and their ultimate decision to reach out.

The default out-of-the-box values for any submission are

- **Referrer URL:** The full URL of the referrer source
- **Search terms:** The keyphrases used to find the website

- **Landing page:** The first page reached on the website
- **Marketing type:** Referrer, organic search, paid search, or direct

Between June 1 and December 31, 2010, there were 2,490 total leads via web forms. Reviewing leads by source showed that website contacts were much more likely to be promoted to opportunities than leads from other sources, which included purchased contact lists. In the second half of the year, about 7% of all new leads came from the website, but about 14% of the opportunities in the same time period were attributed to website sources.

In addition, we found that form leads from Referrer traffic turned into opportunities well. This underscored the value of having domain experts and industry commentators discuss the company's products and services online, particularly in ways that get the attention of target customers.

The analysis provided a list of industry websites and press release websites that had referred visitors who turned into leads and opportunities, a great list to prioritize for further activities and perhaps some cross-promotions.

Summary

Build a process to get the metrics you need to make informed decisions. To do so, you must start or deepen your company's commitment to web analytics and lead management through call tracking and CRM.

Few individuals have the skills and breadth of experience to aggregate and analyze this information. You need to build a team that spans marketing, sales, and customer service to tie together the rich data that has previously been the province of each department. Those who participate will be rewarded with a richer perspective on your company's activities and the outcome of each.

To establish a mindset for analytics success and track and manage your leads:

- Establish an analytics process.
- Decide how much time you can devote to analysis (and resulting action items) within a given period (week, month, and so on).
- Stick to this schedule, moving through an incremental sequence for improvement:
 - Move through the three major steps in the process (defining visitors, qualifying visitors, and turning visitors into visitors of value) alternately, analyzing the appropriate reports for each on a regular basis, then making changes.

- Reporting is not analysis. Only about 20% of your analytics process should be generating reports. The other 80% should be analysis.
- Use the reports as a jumping off point for action items. Always experiment and test to ensure a “democracy” of ideas, where no idea is favored over another without a good reason.
- Adopt a shared system for tracking lead and customer contacts, such as a CRM system like Salesforce:

Automate the capture of critical marketing data along with contact name, address, and telephone information through web form integration and custom phone numbers.

- Nurture your leads through email marketing, social media, and providing relevant and useful information through blogs, whitepapers, and events.
- Consider how multiple touches may contribute to a lead or a sale, and develop a lead-attribution weight that considers “assists.”