Lead Attribution ⚙

This article applies to:

Keap is now automatically capturing any utm_parameters you have on your links to Public Forms, Checkout Forms, and the New Landing Pages. They are being recorded on the contact record, AND you can even start searching through your contacts by utm_parameters so you can get an idea of how your marketing funnel is performing.

Said differently, at the end of the day, you want to know what your Return on Ad Spend (ROAS) is. Knowing which efforts are generating 2X, 3X or 10X the revenue is SUPER IMPORTANT to any business.

Using utm_parameters is essentially like getting the keys to Scrooge McDucks money bin… well maybe not that big, but it enables you to see where you should be spending your advertising dollars and marketing efforts.

Keep reading to understand more.

What the heck is a utm_parameter and why should I care?

As a small-business owner who wants to optimize how they are spending their marketing dollars, you're a detective trying to solve a mystery. You want to know where your website visitors are coming from and which marketing efforts are bringing them to your site.

UTM parameters are like clues or tags that you add to the end of your website links to help you track and identify different places (or sources) of your web traffic; think of things like social media posts, email campaigns, or online ads.

When someone clicks on a link you send them with UTM parameters attached, those parameters are sent back to your website and tracked by tools like Google Analytics.

By using UTM parameters, you can easily see which specific marketing activities are generating the most traffic and which ones are not as effective. It's like having a magnifying glass to examine the footprints left behind by your visitors. You can tell if they came from a Facebook post, a newsletter, or a banner ad.

Even more exciting than seeing where your traffic is coming from is being able to make smarter decisions as a marketer.

You can focus your efforts on the channels that bring in the most traffic and adjust your strategies for the ones that are not performing well. It's like being a detective who knows which clues are leading to the best leads and which ones are just a dead end.

Ultimately, by using UTM parameters whenever you are sending out links, you can become a super sleuth marketer, gathering valuable information about your audience and making informed decisions to improve your marketing strategies.

The most commonly used UTM parameters

Below we have listed the MOST COMMON utm_parameters the marketers use. Again, if you are using Google Analytics or other website analytics tools, this may seem familiar:

- utm_source: This parameter identifies the specific source of the traffic, such as a website, search engine, or social media platform.

- utm_medium: It indicates the marketing medium or channel that brought the traffic, such as email, CPC (cost-per-click) ads, or organic search.

- utm_campaign: This parameter tracks a specific campaign or promotion associated with the link.

- utm_term: It is used for paid search campaigns to track the keywords or search terms associated with the ad.

- utm_content: This parameter allows for tracking different versions or elements of a marketing campaign, such as different ad variations or call-to-action buttons. This is super helpful if you want to A/B test in your marketing

Let's look at some examples of how this can help you make decisions on your marketing based on the return on investment (ROI) you are getting from your efforts.

A practical example of using utm_parameters in marketing efforts

Initial Scenario:

Let's say that you are the owner of Leafy Green Landscaping Service. You are excited about the upcoming spring season, and want to promote your landscaping services to attract new customers. Your end goal is to have new prospects request a bid for your services. You are promoting a monthly service that is priced at $165 per month.

You plan to launch a marketing campaign to your local area using Facebook, Instagram, and Google AdWords.

As you will be spending money on ads in each of the platforms, you would want to create separate links to track the performance of their campaign.

You can use UTM parameters to add relevant information to the links you put in your ads. The bid request will direct potential customers to a specific page on the Leafy Green Landscaping website, where they can request a quote for their landscaping needs.

Here are the three separate links with UTM parameters for the bid request:

- Facebook (Meta):
    - Website: https://www.leafygreenlandscaping.com/bid-request
    - UTM Parameters:
        - utm_source=facebook
        - utm_medium=social
        - utm_campaign=spring-campaign

- Final Link:

    https://www.leafygreenlandscaping.com/bid-request?
    utm_source=facebook&utm_medium=social&utm_campaign=spring-
    campaign

- Instagram:
  - Website: https://www.leafygreenlandscaping.com/bid-request

  - UTM Parameters:
    - utm_source=instagram

    - utm_medium=social

    - utm_campaign=spring-campaign

  - Final Link:

 https://www.leafygreenlandscaping.com/bid-request?
utm_source=instagram&utm_medium=social&utm_campaign=spring-campaign

- Google AdWords:

  - Website: https://www.leafygreenlandscaping.com/bid-request

- UTM Parameters:

  - utm_source=google-adwords

  - utm_medium=social

  - utm_campaign=spring-campaign

  - utm_term=spring+cleaning

- Final Link:

 https://www.leafygreenlandscaping.com/bid-request?utm_source=google-
adwords&utm_medium=social&utm_campaign=spring-
campaign&utm_term=spring+cleaning

By using these separate links with specific UTM parameters, you will be able to track the effectiveness of their marketing efforts on each platform.

They can analyze the anonymous web traffic data in Google Analytics or other analytics tools to measure the number of bid requests generated from Facebook, Instagram, and Google AdWords, and you get a huge piece of the puzzle. You get an understanding of where your traffic is coming from.

Now remember, your analytics tools like Google Analytics (GA or GA4) only let you see anonymous traffic. That means you'll have no idea WHO actually came to you.

Many businesses will say "Hey, I have leads coming in, and I know I am advertising on these 3 platforms, so it must be working. That's good enough for me."

If that is you… totally good (no judgment).

However, If you want to optimize your marketing spend, AND want to be able to make informed marketing decisions based on the traffic sources that are most profitable, keep reading.

The other side of the story

So, your ads have been running at $75/day for 4 weeks now.

Using your analytics tools (looking at the anonymous traffic), you can see the following - we will use $1,000 per channel for easy math:

Channel	Spend	Impressions	Click Rate (CTR)	Visits		Leads/Opt-ins		Customers	
Facebook (Meta)	$1,000	100,000	0.9%	900	$0.90	15	$66	1	$1,000
Instagram	$1,000	25,000	2%	1,150	$0.87	20	$50	4	$250
Google Adwords	$1,000	2,000	5%	100	$20	8	$125	6	$166

Based on these initial numbers you would say… "I am going to double down on Google AdWords," but keap reading… we don't have enough to make an informed decision.

Most of the time, small businesses are frustrated because they have traffic, but really small conversion.

Have you ever thought… "How can I be worried about my [plan for my spring lawn service] if I am getting 2,300 people per month to my website. People should be knocking down my door, but for some odd reason, they aren't"

Let's understand why.
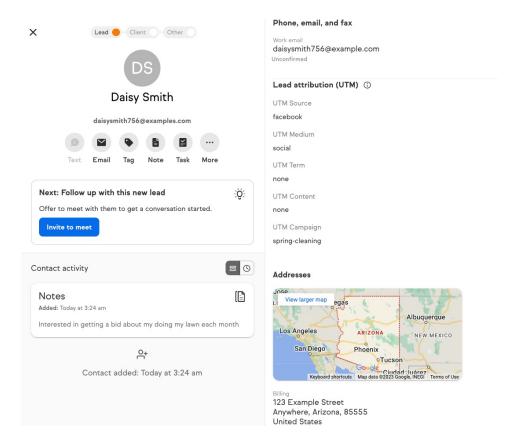
Using Keap Lead Attribution To Get Specifics

Prior to launching your campaign you created your "Bid Request Form" asking for a Name, Phone Number, and an Address.

You then allowed your prospects to schedule a time with you using Keap Appointments so you could be sure they were at the house when you went by to make them a bid and pitch them on your $165/m service.
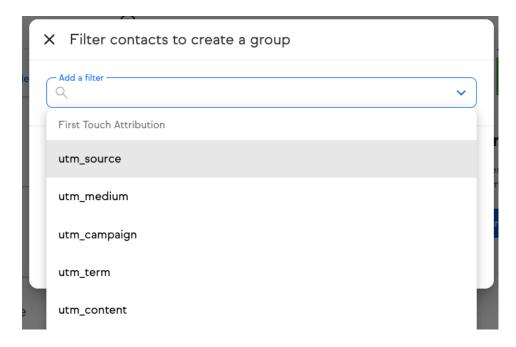
Here is the fun part…

Because you used the UTM parameters in your links, you didn't even have to make any changes to your bid request form… the contacts you have coming into Keap will already have lead source information attributed to them!
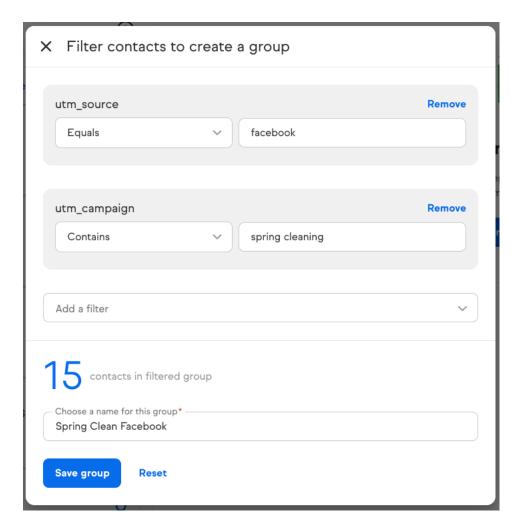
This is an example of what you saw in your Keap Contact Records

Excited to see what you have showing up in your CRM, you go to the contact search and create a group for each of the lead sources.
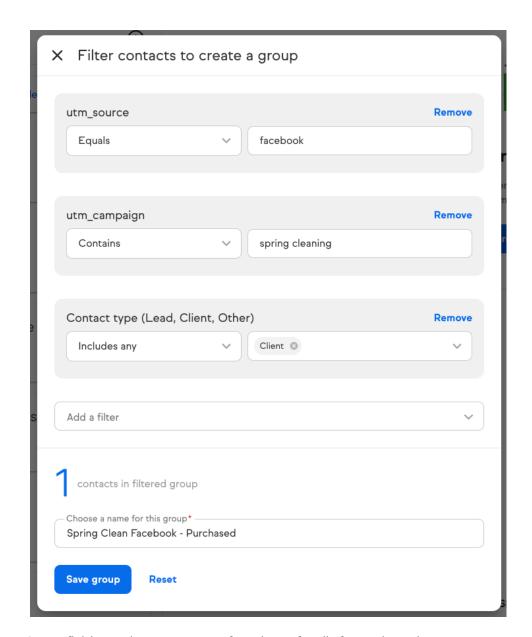

Then you ad a utm_source and utm_campaign name so you know which of your leads came from these specific marketing efforts.

After you have groups built for Facebook, Instagram and Google you can fill in the next part of your chart.

Channel	Spend	Impressions	Click Rate (CTR)	Visits		Leads / Opt-ins		Customers	
Facebook (Meta)	$1,000	100,000	0.9%	900	$0.90	15	$66	1	$1,000
Instagram	$1,000	25,000	2%	1,150	$0.87	20	$50	4	$250
Google AdWords	$1,000	2,000	5%	100	$20	8	$125	6	$166

Now you want to see how many became customers, and so you create a new contact search for each of the channels and include "Person Type is Client" lead type to understand how many customers you got from your campaign.

Filter contacts to create a group

utm_source — Remove

| Equals ∨ | facebook |

utm_campaign — Remove

| Contains ∨ | spring cleaning |

Contact type (Lead, Client, Other) — Remove

| Includes any ∨ | Client ⊗ ∨ |

| Add a filter ∨ |

1
contacts in filtered group

Choose a name for this group*

Spring Clean Facebook - Purchased

Save group Reset

As you finish creating your groups of purchases for all of your channels you start to see the full funnel picture.

Channel	Spend	Impressions	Click Rate (CTR)	Visits		Leads / Opt-ins		Customers	
Facebook (Meta)	$1,000	100,000	0.9%	900	$0.90	15	$66	1	$1,000
Instagram	$1,000	25,000	2%	1,150	$0.87	20	$50	4	$250
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So you learn that at first you were thinking that instagram was your best lead source because your cost per visit was the lowest.

In reality, it looks like that your cheapest Cost per Customer was Google AdWords.

However there is 1 more step, and that is looking at the REVENUE you generated.

With the $165/m product you are selling:

Channel	Spend	Cost Per Customer		Revenue Over 12 Months	Return on Ad Spend (ROAS)	
Facebook (Meta)	$1,000	1	$1,000	$1,980	$0.98	1X
Instagram	$1,000	4	$250	$7,920	$6.92	7X
Google Adwords	$1,000	6	$166	$11,880	$10.88	11X

Based on what you know by being able to use Lead Attribution in Keap to show you the rest of your marketing funnel you can now make an informed decision.

Yes, each of these campaigns is positive.

For every dollar you spend on facebook you make $0.98 back. We would never say no to making money for your business.

What if you could take the $1,000 on facebook spend and split it across Instagram and Google AdWords?

What would that mean for your revenue!?

You are now a Marketing SUPER SLEUTH!!

The moral of the story

- With existing analytics tools you can only see anonymous visitors and you don't get the full picture of how your marketing spend is performing

- Using Keap Lead Attribution, you can track your leads and determine which sources are actually performing the best

- Keap will automatically capture this information and report on it for you if you add utm_parameters to any New Landing Pages, Public Forms, or Checkout Pages.