Full Circle INSIGHTS®

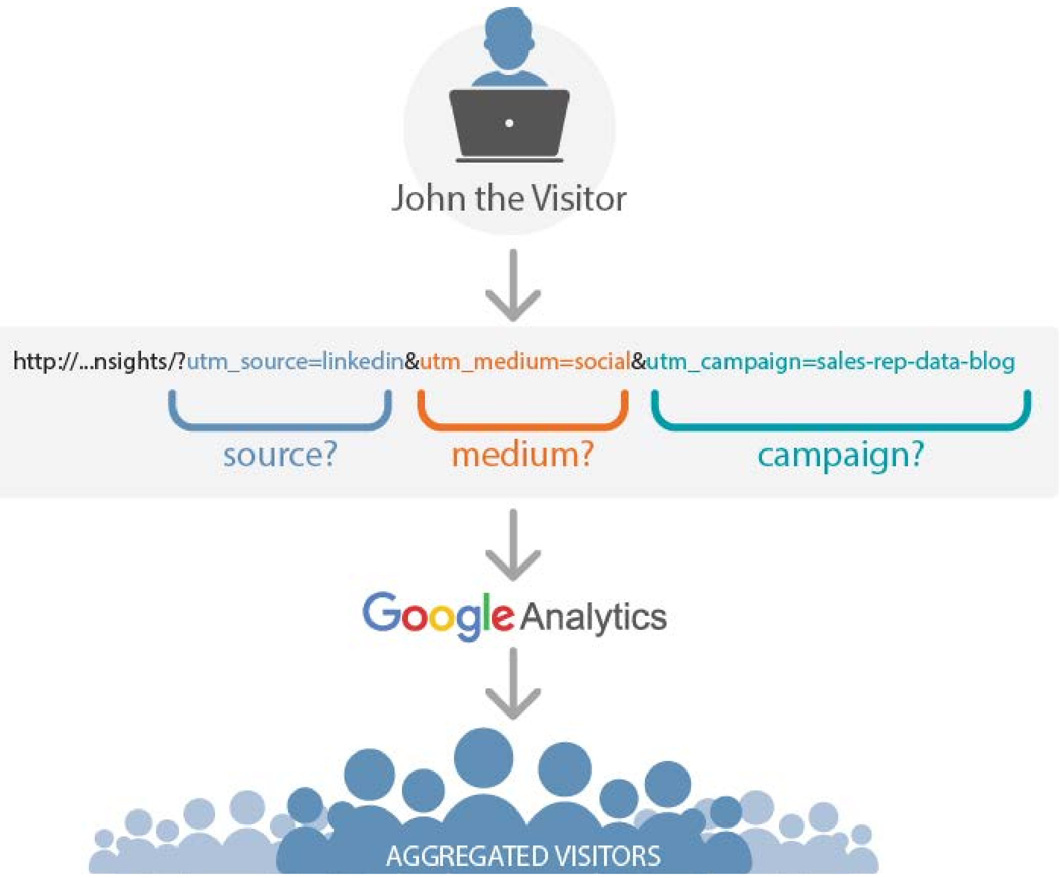
The Definitive Guide to Tracking UTM Parameters in Salesforce

Full Circle Insights
FullCircleInsights.com
650.641.2766
877.834.4001

Full Circle Insights is providing this how-to guide on UTM Parameters, including the why and the how of tracking them in Salesforce. We split this guide into three parts: 1) intro to UTM codes, 2) tracking UTM Parameters in Salesforce, and 3) how Full Circle Insights solves data gaps and turbocharges UTM Parameter tracking in Salesforce. If you have any questions, feel free to reach out to a marketing analytics expert at http://fullcircleinsights.com/contact-us/.

What are UTM Parameters?

UTM Parameters, otherwise known as Google's Urchin Tracking Module, allows marketers to track and measure the success of various dimensions of their online marketing campaigns. Let's say you have a whitepaper on your website that you want to promote via various channels across the web. You'd like to understand not only how much traffic each referral link is bringing to your website, but whether certain channels, mediums, search terms, etc. are resulting in greater revenue for your company. Armed with this knowledge you can more safely invest and predict how much revenue your campaigns can bring in.



Information provided by UTM Parameters

UTM Parameters allow marketers to track all this information without having to create separate landing pages for each referral link. By appending information about the specific promotion in the URL that directs to your landing page, you can have a single landing page and track all of the channels driving to that page dynamically. So, what specifically can you track?

utm_source: Used to describe where the traffic is coming from. For example, the name of the website, newsletter name, or social media outlet.

utm_medium: Used to describe the medium of the element or type of source such as cpc, email, banner, social, etc.

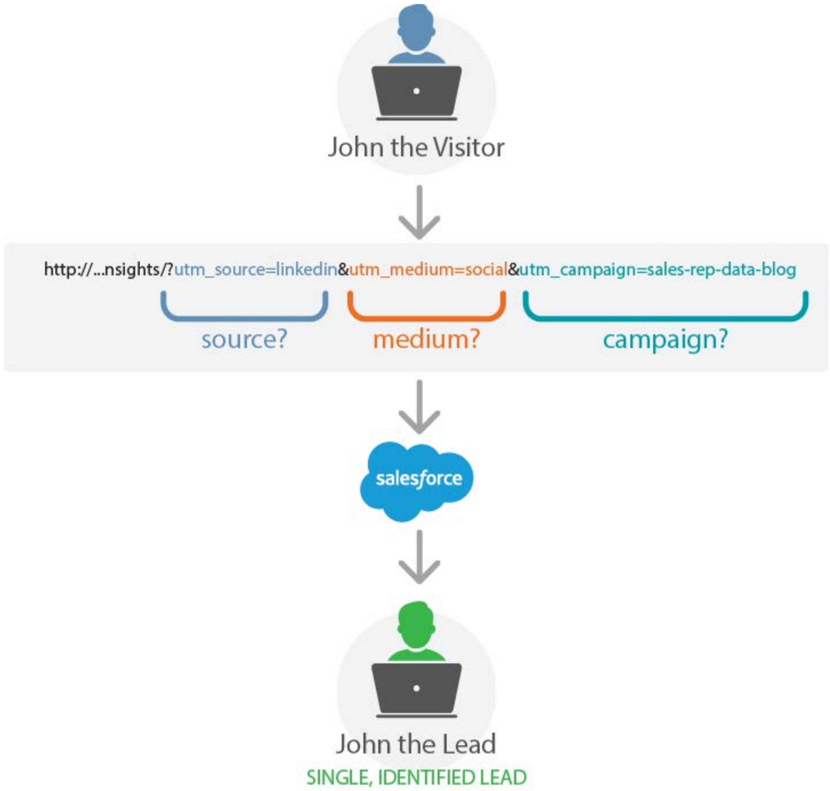
utm_campaign: Used to describe the overall campaign you are running. For example, XYZ Whitepaper, 0516-XYZ-Webinar, etc.

utm_term: Used to tag paid keywords. For an ad for "Campaign Attribution," this might be "campaign-attribution."

utm_content: Used for a/b testing calls to action (CTAs). For example if you have a newsletter with a link to your whitepaper in the footer and the sidebar, you would have "utm_content=footer-link" and "utm_content=sidebar-link" to differentiate between the two links.

Why track UTM Parameters in Salesforce?

If you are familiar with UTM Parameters already, you know that Google Analytics offers very rich reporting on conversion tracking. So, why would you need to also pull this data into Salesforce? The main reason is that the conversions Google Analytics track are related to Goals that you set which are generally whether or not the user gets to the thank-you page after landing on your website and not whether or not that person converts to become a customer (those that have e-commerce websites can more readily track conversions to customer since it's all done on the website, but those B2B companies with long sales cycles may not be able to track this exclusively using Google Analytics).



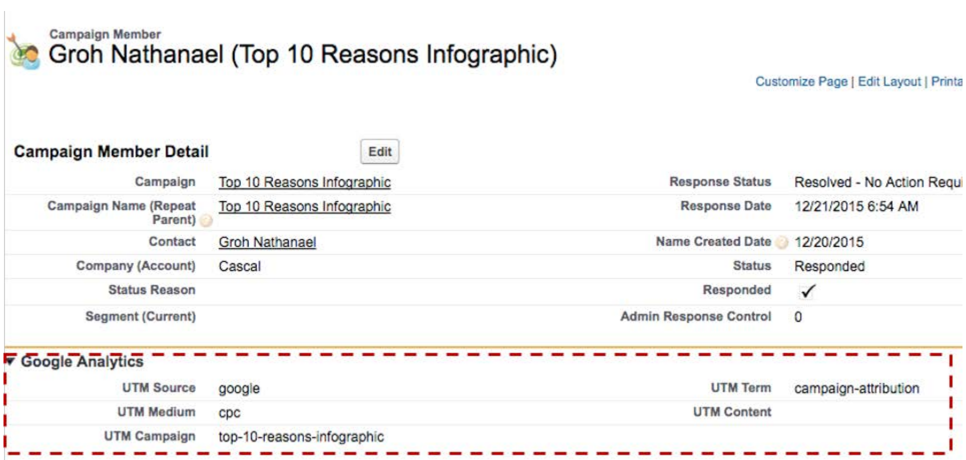
The information about customer conversion lives in Salesforce as Opportunity records. You'll want to tie UTM Parameter information to your Opportunities in Salesforce in order to arrive at the holy grail of marketing analytics, your return on marketing investment (ROMI). Moreover, there are additional metrics that Google Analytics isn't capturing that Salesforce does such as those Leads generated from your Campaigns that end up Disqualified due to lack of budget, purchasing from a competitor, junky data, etc. All of these data points are important dimensions you should be tracking in order to make data-driven marketing decisions.

How to track UTM Parameters in Salesforce

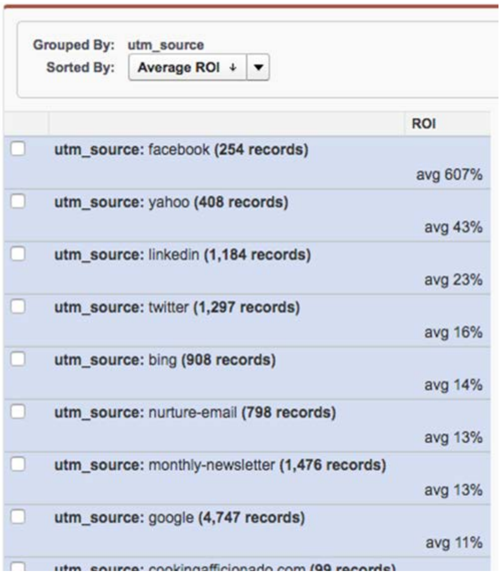
How you pull this data into Salesforce will depend on how the data is being pushed to your Marketing Automation platform (MAP). Some MAPs have the native ability to grab the parameter from the URL string and populate a hidden field on the form, and subsequently push that data to the corresponding Lead/Contact record in the system or in some cases (Eloqua) even the corresponding Campaign Member in the system. With other MAPs you may have to put some javascript on your landing page to grab the parameters and push the data into hidden fields on your form.

Once the data is in your MAP, you can then push the data to Salesforce either through the native Lead/Contact sync, or for those platforms that can write to the Campaign Member object, directly to the Campaign Member. Depending on whether this data lives on your Lead/Contact or Campaign Member will depend on how this data gets associated to Opportunities: **Direct to Campaign Member**, or **Direct to Lead/Contact**.

Direct to Campaign Member



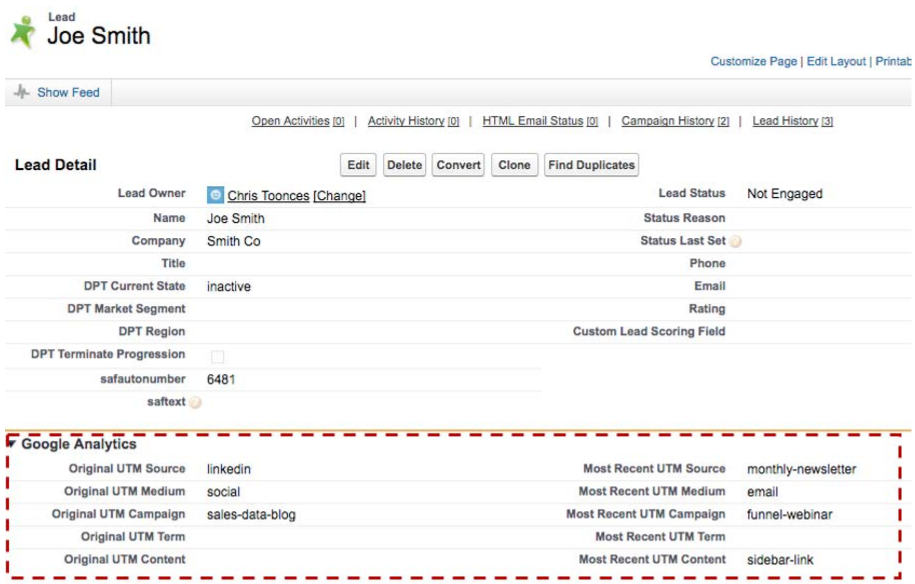
Some MAPs, such as Eloqua, will allow you to post data from a form fill to a custom data object and have that custom data object integrate with the Campaign Member object in Salesforce. Once the data is in Salesforce, you can then run standard Salesforce ROI and Campaign Influence reports to better understand the sources, mediums, search terms, etc. that are turning prospects into customers.



Sample ROI Report using utm_source.

Sample Campaign Influence Report using utm_medium.

Direct to Lead/Contact



Many MAPs do not allow for direct access to custom Campaign Member fields. In order to track UTM parameters in these environments, you can write the data directly to Lead/Contact fields. The question you will want to ask yourself then becomes, if a Lead/Contact responds to multiple Campaigns, will I overwrite the utm fields on the Lead/Contact or keep the original? Some organizations may choose to have two fields for each parameter, an original and a most recent, in order to track multiple engagements.

The fields on the Lead/Contact can then be mapped to the Opportunity when created, to better understand ROI. Influence is a bit trickier in this scenario since there is no one-to-many relationship between Opportunities and Campaign responses like the Direct to Campaign Member option. By having both original and most recent UTM parameter values, you can track the amount of revenue your lead generation Campaigns have generated as well as the amount of revenue generated by your last touch before Opportunity Creation. Keep in mind that both of these examples are attributing the entire Opportunity amount to each Original/Most Recent UTM parameter.

Grouped By: Original utm_medium
Sorted By: Sum of Count ↓

	Count	Amount
Original utm_medium: organic **(283 records)**	283	$34,305,805.00
Original utm_medium: social **(102 records)**	102	$11,115,805.00
Original utm_medium: cpc **(89 records)**	89	$11,462,480.00
Original utm_medium: referral **(71 records)**	71	$8,307,623.50
Original utm_medium: email **(38 records)**	38	$3,987,335.00
Original utm_medium: banner **(14 records)**	14	$2,182,030.00
Original utm_medium: - **(3 records)**	3	$600,000.00
Grand Totals (600 records)	**600**	**$71,961,078.50**

Sample Opportunities Report showing Revenue Generated based on original utm_medium.

Grouped By: Most Recent utm_medium
Sorted By: Sum of Count ↓

	Count	Amount
Most Recent utm_medium: organic **(250 records)**	250	$28,657,430.00
Most Recent utm_medium: cpc **(105 records)**	105	$13,859,345.00
Most Recent utm_medium: social **(96 records)**	96	$11,376,005.00
Most Recent utm_medium: referral **(67 records)**	67	$8,137,382.50
Most Recent utm_medium: email **(66 records)**	66	$7,664,386.00
Most Recent utm_medium: banner **(13 records)**	13	$1,666,530.00
Most Recent utm_medium: - **(3 records)**	3	$600,000.00
Grand Totals (600 records)	**600**	**$71,961,078.50**

Sample Opportunities Report showing revenue generated based on most recent (last touch) utm_medium.

Gaps with these native methods

The standard ROI, Campaign Influence, and Opportunity reports available in Salesforce leave marketers with a few key data gaps: **multi-touch attribution**, **data overwrites**, and **process misalignment**.

1) Multi-Touch Attribution

Some MAPs, such as Eloqua, will allow you to post data from a form fill to a custom data object and have that custom data object integrate with the Campaign Member object in Salesforce. Once the data is in Salesforce, you can then run standard Salesforce ROI and Campaign Influence reports to better understand the sources, mediums, search terms, etc. that are turning prospects into customers.

Campaign ROI Reports (using the "Direct to Campaign Member" method) are driven off the "Primary Campaign Source" field. The "Primary Campaign Source" by default is the last touch prior to Opportunity Creation (if, and only if, the Opportunity was created by Lead conversion OR directly from the Contact). This method discounts the value other Campaigns the Lead/Contact may have engaged with as well as other related influencers on the Opportunity. When it comes to tracking UTM Parameter data in ROI reports, only the UTM parameters associated with the Campaign Member of the "Primary Campaign Source" are given attribution credit.

Opportunity Reports (using the "Direct to Lead/Contact" method) are able to pull in UTM Parameter data from the Lead/Contact if the Opportunity is created on conversion or if the Opportunity was created off the Contact, but these data points are usually just the original source or the most recent source, so these reports miss all the touches in between. Not to mention it's only pulling the data from the originating Contact, so we miss all the touches related to other influencers on the Opportunity.

Campaign Influence Reports (using the "Direct to Campaign Member" method), unlike ROI and Opportunity reports, can provide marketers with a multi-touch solution in that any Campaign Member created during the influence timeframe related to a Contact on the Opportunity can be considered influential. However, there isn't a way to split out the revenue across all the related touches. Instead the Total Opportunity Amount is attributed to each touch, bloating the actual revenue amount that marketing has influenced. In order to track UTM Parameter data in these reports, your MAP must also allow for direct access to custom Campaign Member fields. These limitations make assigning attribution to Campaigns unreliable, and thus make it more difficult for marketers to predict performance and allocate budget accordingly.

In summary, the out-of-the-box methods can provide marketers with a high-level view of the Campaigns that are driving revenue, but more advanced analytics require a more robust solution.

2) Data Overwrites

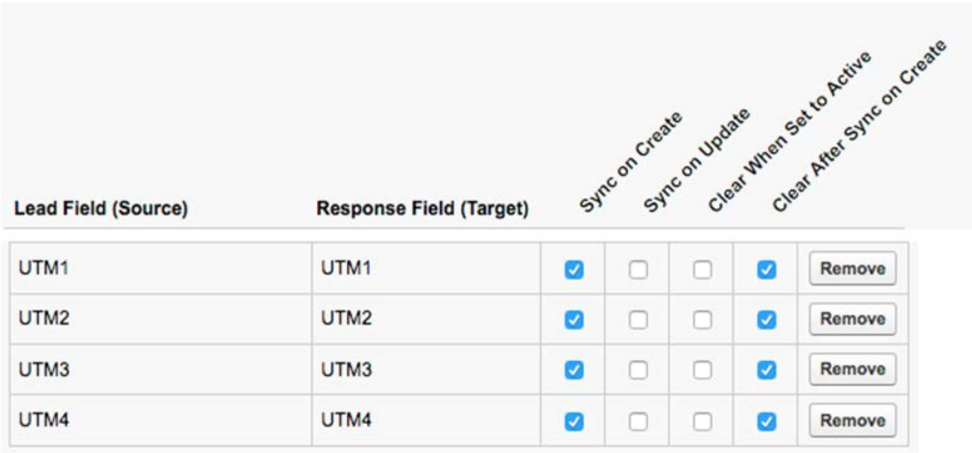
Using the Direct to Lead/Contact method, the UTM parameter data in the "most recent" fields can get overwritten as the Lead/Contact engages with more Campaigns. While this method can give marketers a good snapshot of the Campaigns that generated the Lead and the most recent interaction, data is lost on all the touches in between.

3) Process Misalignment

All of these methods assume that your sales team follows a strict process of only creating Opportunities during Lead conversion or off an existing Contact. Creating Opportunities off the Account, cloning an existing Opportunity, or creating an Opportunity through Quick Create, will leave you without any attribution. If your sales team isn't aligned with your marketing team in agreeing on the importance of creating Opportunities off Leads/Contacts, your marketing team will be left with gaps in attribution.

How Full Circle turbocharges UTM Parameter tracking

Using Full Circle Response Management, marketers can resolve the data gaps caused by the native methods. Specifically, with Response Management, UTM Parameter data can live at the Campaign Member level regardless of whether the MAP your team uses has the ability to write to custom Campaign Member fields. The Response Management configuration has an option to allow marketers to sync fields from the Lead/Contact onto the Campaign Member when the Campaign Member is created and then clear them on the Lead/Contact once synced.



Lead Field (Source)	Response Field (Target)	Sync on Create	Sync on Update	Clear When Set to Active	Clear After Sync on Create	
UTM1	UTM1	☑	☐	☐	☑	Remove
UTM2	UTM2	☑	☐	☐	☑	Remove
UTM3	UTM3	☑	☐	☐	☑	Remove
UTM4	UTM4	☑	☐	☐	☑	Remove

For those marketers lucky enough to have a MAP that writes directly to the Campaign Member this setup isn't necessary. However, there are still additional steps that can be taken to resolve the data gaps left by native methods.

Once this is set up, Full Circle Response Management can resolve the aforementioned data gaps: **multi-touch attribution**, **data overwrites**, and **process misalignment**.

1) Multi-Touch Attribution

Full Circle's weighted attribution models allow marketers to distribute the revenue for an Opportunity across all the relevant Campaign touches (whether related to Contacts on the Opportunity or Contacts at the Account the Opportunity is associated with). Once you've set up Response Management to sync UTM parameter data to the Campaign Member, this same data can then be synced to the Campaign Attribution Detail object (this object is used by the weighted attribution model to derive attribution calculations):

Campaign Influence Detail Field Synchronization

Response Field	Campaign Influence Detail Field	
Segment (Current)	Segment	Remove
utm_medium	utm_medium	Remove
utm_source	utm_source	Remove

Having this data on the Campaign Attribution Detail object allows marketers to attribute Opportunity revenue to specific UTM Parameters.

	Closed Op Revenue Model1	Closed Op Revenue Model2	Closed Op Revenue Model3
Campaign: Campaign Name: Tech Tips Webinar **(93 records)**	$20,861.1204	$5,357.1429	$4,504.6958
utm_medium: cpc **(21 records)**	$4,379.2897	$0.0000	$692.8342
utm_medium: email **(17 records)**	$3,562.1904	$0.0000	$1,552.8211
utm_medium: organic **(47 records)**	$11,959.5215	$5,357.1429	$1,975.7071
utm_medium: referral **(8 records)**	$960.1187	$0.0000	$283.3333
Campaign: Campaign Name: Terminal Comparison Guide **(267 records)**	$103,817.0591	$92,813.9633	$32,962.4175
utm_medium: banner **(16 records)**	$6,348.3767	$0.0000	$3,201.9197
utm_medium: cpc **(47 records)**	$11,299.1422	$15,000.0000	$6,312.0457
utm_medium: email **(3 records)**	$4,812.2953	$11,273.3333	$0.0000
utm_medium: organic **(52 records)**	$13,346.6671	$3,795.4545	$2,729.7739
utm_medium: social **(149 records)**	$68,010.5778	$62,745.1754	$20,718.6783

Sample Campaign Attribution Report showing Attribution on utm_medium by Campaign.

	Closed Op Revenue Model1	Closed Op Revenue Model2	Closed Op Revenue Model3
Opportunity: Opportunity Name: Acme-5 **(12 records)**	$42,857.1429	$0.0000	$44,117.6471
utm_medium: email **(2 records)**	$7,142.8571	$0.0000	$5,882.3529
utm_medium: referral **(1 record)**	$3,571.4286	$0.0000	$2,941.1765
utm_medium: social **(9 records)**	$32,142.8571	$0.0000	$35,294.1176
Opportunity: Opportunity Name: Al's Coffeee Shop-20 **(17 records)**	$8,125.3704	$0.0000	$8,125.3704
utm_medium: banner **(6 records)**	$2,867.7778	$0.0000	$2,867.7778
utm_medium: organic **(3 records)**	$1,433.8889	$0.0000	$1,433.8889
utm_medium: social **(8 records)**	$3,823.7037	$0.0000	$3,823.7037
Opportunity: Opportunity Name: Al's Coffeee Shop-46 **(1 record)**	$1,750.0000	$0.0000	$1,750.0000
utm_medium: social **(1 record)**	$1,750.0000	$0.0000	$1,750.0000

Sample Campaign Attribution Report showing Attribution on utm_medium by Opportunity.

	Opportunity: Count	Influence Conversion	Influence Amount Conversion	Influence Weighted Conversion (Model1)
Deal Size: Small **(12,299 records)**	414	49.76%	52.49%	49.78%
utm_source: facebook **(37 records)**	35	37.14%	33.33%	30.61%
utm_source: google **(7,332 records)**	318	50.31%	54.09%	52.74%
utm_source: linkedin **(856 records)**	259	57.92%	64.41%	57.29%
utm_source: monthly-newsletter **(1,558 records)**	229	45.85%	51.64%	40.22%
utm_source: twitter **(2,516 records)**	284	52.46%	57.86%	62.52%
Deal Size: Medium **(1,615 records)**	62	74.19%	74.34%	73.68%
utm_source: google **(1,003 records)**	52	75.00%	75.00%	67.71%
utm_source: linkedin **(98 records)**	38	97.37%	96.98%	79.11%
utm_source: monthly-newsletter **(170 records)**	29	79.31%	82.01%	67.87%
utm_source: twitter **(344 records)**	45	80.00%	80.83%	87.08%

Sample Campaign Attribution Report showing Conversion rates of utm_sources by Deal Size.

2) Data Overwrites

Through the synchronization method described above, there is no risk of losing data on all the Campaign touches your Leads/Contacts are engaging with. Each and every touch and related UTM Parameters will be tracked to the Campaign Member.

3) Process Misalignment

Response Management can require sales reps to always create an Opportunity off of a Contact. For those organizations that have a different Opportunity creation process (creating Opportunities off Accounts, etc.) and do not want to enable this requirement, Campaign Attribution can still be calculated on Contacts at the Account the Opportunity is associated with. This Account-based attribution model fills in any gaps your sales team leaves behind in terms of adding all the appropriate influencers to the Opportunity.

Conclusion

Utilizing and tracking UTM Parameters in Salesforce is essential for any marketer, providing the ability to drill into specific Campaign characteristics to find what channels are converting Leads into Customers. While native methods provide marketers a high-level view of Campaign performance, to have more definitive answers on the sources, mediums, keywords, etc. that are driving revenue, a more robust solution that allows for weighted multi-touch attribution is necessary.

About Full Circle Insights

Full Circle Insights delivers marketing performance measurement solutions that provide actionable intelligence with funnel analytics and attribution data to optimize the marketing mix and drive more revenue. Our cloud-based products are built 100% on the Salesforce App Cloud and are compatible with the leading marketing automation solutions.

Founded by former Salesforce executives and implementation veterans, CRM product managers, and marketing automation specialists, Full Circle Insights comprises industry pioneers and thought leaders who know what it takes to run a successful marketing organization. The team is passionate about giving marketers the answers they need to uncover a marketing campaign's impact to the business, plan with confidence, and grow revenue. Learn more at www.fullcircleinsights.com.

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