



The Conversion Disconnect

Why Ad Platform Data Misguides You in Lead Gen

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Who this?

Hello!

The name is **Erika Schmidt**
Data Analysis is my game

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LET'S KICK IT OFF WITH A QUESTION

Are you integrating your marketing data with a CRM?



A man with a full beard and a woman are sitting at a table, looking at each other. The man is wearing a dark suit and a red tie. The woman is wearing a white top and a necklace. They appear to be in a meeting or discussion.

We've all been there...

We aren't seeing any sales come through. How do we know if PPC is driving qualified leads?

And this is our response..

ಽ_(ツ)_/

Great question! Let me follow up.

So what's your point?

Do we know often our leads turn into sales?

Are the leads even qualified?



Half the money I spend on advertising is **wasted**; the trouble is **I don't know** which half.

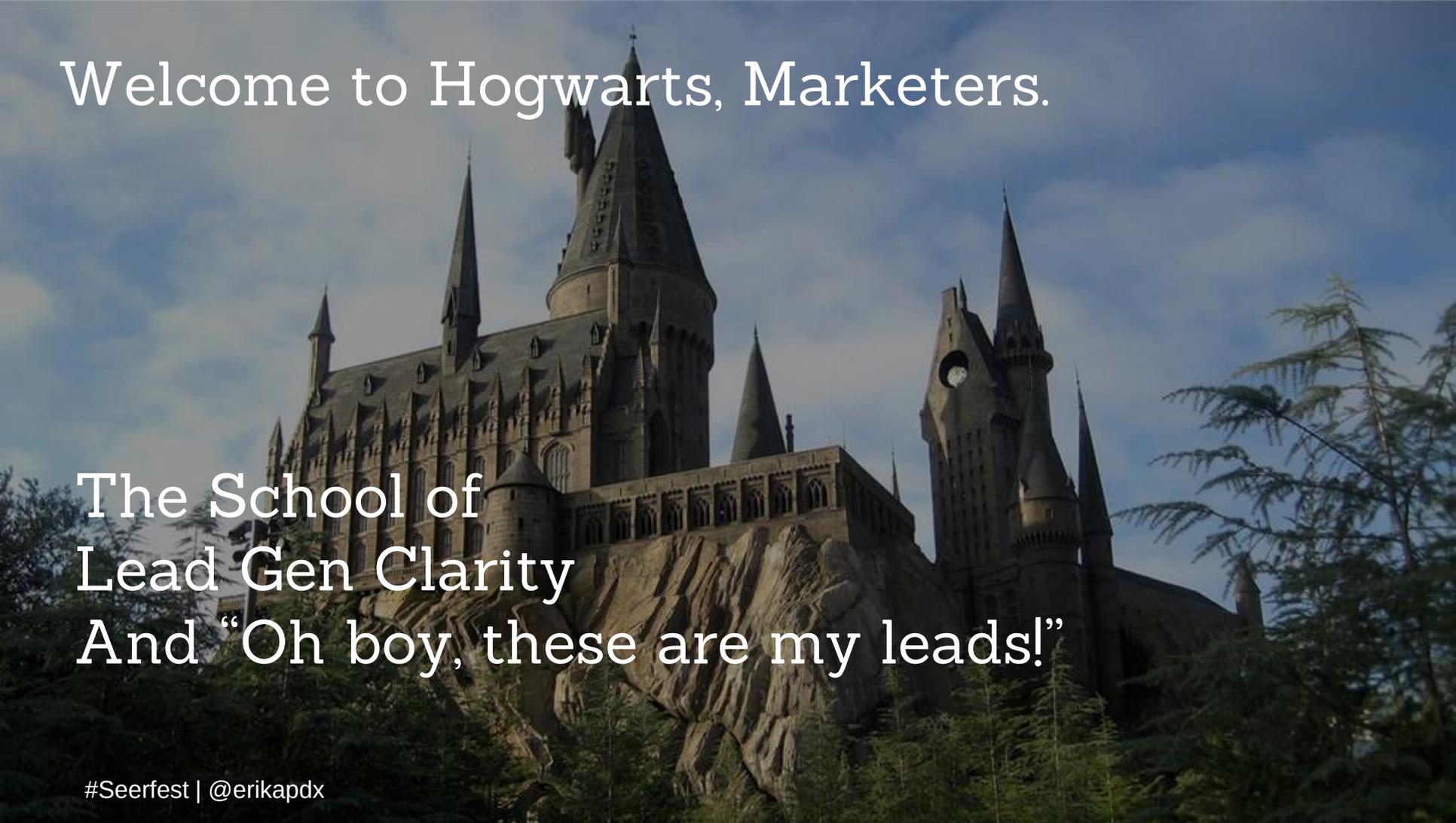
- John Wanamaker



We will touch on:

1. Campaigns
2. Landing Pages
3. Sales Process



A photograph of the Hogwarts Castle from the Harry Potter series, built on a rocky cliffside. The castle features several tall, dark spires and a prominent clock tower on the right. The sky is a clear, bright blue. In the foreground, there are green trees and bushes, some of which are slightly out of focus.

Welcome to Hogwarts, Marketers.

The School of
Lead Gen Clarity
And “Oh boy, these are my leads!”

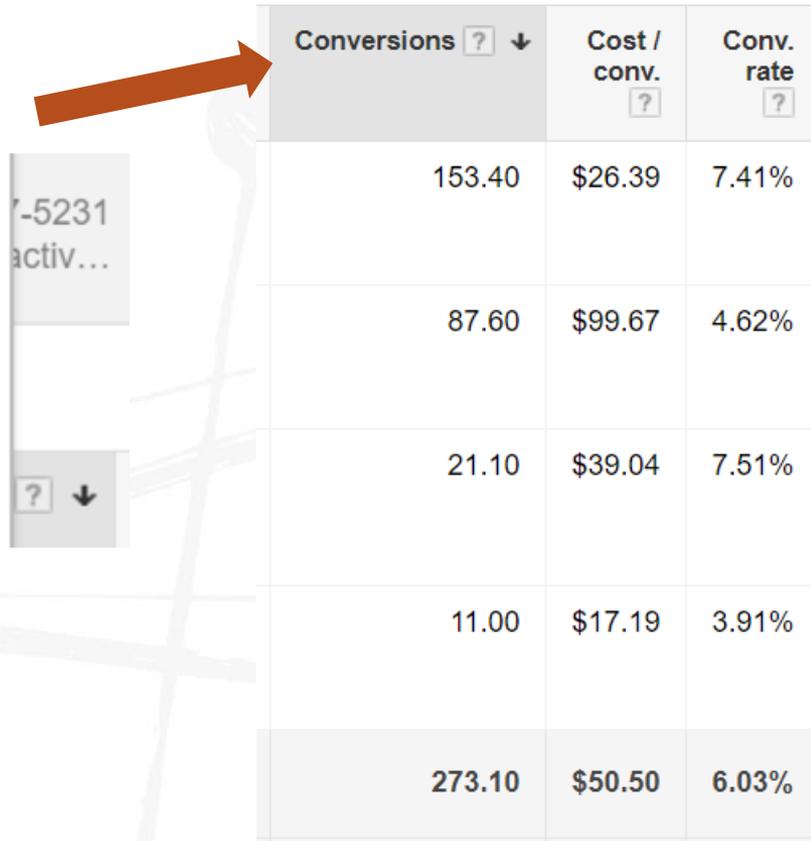
Campaigns



The Problem with Ad Platforms

The Conversions column reports total conversions, across those conversion actions you've chosen to include.

What it means: See how many times your ads led customers to an action you've defined as valuable, such as sales or leads.



Conversions <input type="text" value="?"/> ↓	Cost / conv. <input type="text" value="?"/>	Conv. rate <input type="text" value="?"/>
153.40	\$26.39	7.41%
87.60	\$99.67	4.62%
21.10	\$39.04	7.51%
11.00	\$17.19	3.91%
273.10	\$50.50	6.03%



The Google logo is centered on the page, rendered in its characteristic multi-colored font: blue 'G', red 'o', yellow 'o', blue 'g', green 'l', and red 'e'.

what is a lead in marketing?



This tells us **noothing** about the lead quality.



In **marketing, lead** generation is the **initiation** of consumer interest or enquiry into products or services of a business. **Leads** can be created for purposes such as list building, e-newsletter list acquisition or for sales **leads**.

[Lead generation - Wikipedia](https://en.wikipedia.org/wiki/Lead_generation)

https://en.wikipedia.org/wiki/Lead_generation



About this result



Feedback



Example Time



Meet Client X

2017 Engine Metrics				
Campaign	Cost	Conversions	CPA	CVR
Brand Search	\$3,627	138.5	\$26	3.96%
Non-Brand Display	\$4,479	140.0	\$32	3.09%
Non-Brand Display	\$3,255	11.0	\$296	0.16%
Non-Brand Search	\$37,706	405.5	\$93	5.67%
Non-Brand Search	\$3,818	98.1	\$39	6.11%
Non-Brand Search	\$29,825	1,091.9	\$27	6.29%
Non-Brand Search	\$198	-	\$0	0.00%
Non-Brand Search	\$4,727	305.0	\$15	7.88%



Meet Client X's Top-Performing Campaign



2017 Engine Metrics

Campaign	Cost	Conversions	CPA	CVR
Brand Search	\$3,627	138.5	\$26	3.96%
Non-Brand Display	\$4,479	140.0	\$32	3.09%
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Non-Brand Search	\$198	-	\$0	0.00%
Non-Brand Search	\$4,727	305.0	\$15	7.88%

\$15 7.88%



Buuuut...



...if you tie in qualified lead data

2017 Engine Metrics					Qualified Lead Metrics		
Campaign	Cost	Conversions	CPA	CVR	Qualified Leads (QL)	Cost Per Qualified Lead (CPQL)	Qualified Lead Rate (QLVR)
Brand Search	\$3,627	138.5	\$26	3.96%	13	\$279	0.37%
Non-Brand Display	\$4,479	140.0	\$32	3.09%	-	\$0	0.00%
Non-Brand Display	\$3,255	11.0	\$296	0.16%	-	\$0	0.00%
Non-Brand Search	\$37,706	405.5	\$93	5.67%	24	\$1,571	0.34%
Non-Brand Search	\$3,818	98.1	\$39	6.11%	4	\$955	0.25%
Non-Brand Search	\$29,825	1,091.9	\$27	6.29%	37	\$806	0.21%
Non-Brand Search	\$198	-	\$0	0.00%	-	\$0	0.00%
Non-Brand Search	\$4,727	305.0	\$15	7.88%	-	\$0	0.00%



...if you tie in qualified lead data

2017 Engine Metrics

Campaign	Leads	Cost	CPA	Leads	Cost	CPA
Brand Search						0.37%
Non-Brand		\$0				0.00%
Non-Brand		\$0				0.00%
Non-Brand	24	\$1,571				0.34%
Non-Brand	4	\$955				0.25%
Non-Brand	37	\$806	6.29%			0.21%
Non-Brand		\$0	0.00%			0.00%
Non-Brand	305.0	\$15	7.88%			0.00%

Oh boy, these are my leads!





HOLD UP

How did you do that?

First off, you need CRM data.



What are my options?

- AdWords and Salesforce Integration
- Export CRM Data
- Closed Loop Analytics
- Google Analytics 360 and Salesforce Integration



What are my options?

- **AdWords and Salesforce Integration**

- Export CRM Data

- Closed Loop Analytics

- Google Analytics 360 and Salesforce Integration



Pros

Whoop, whoop! CRM data right in AdWords!

Cons

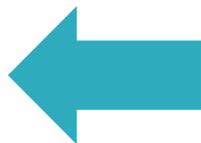
- Just AdWords...
- Just Salesforce...
- Head banging set up process...



What are my options?

- AdWords and Salesforce Integration

- **Export CRM Data**



Pros

Export CRM data when you want it

Cons

- Need CRM access for exports
- Manual data process to clean, pivot, and analyze data

- Closed Loop Analytics

- Google Analytics 360 and Salesforce Integration



What are my options?

- AdWords and Salesforce Integration

- Export CRM Data

- **Closed Loop Analytics**

- Google Analytics 360 and Salesforce Integration



Pros

View CRM data right in GA!

Cons

Lengthy set up time for this custom integration.



What are my options?

- AdWords and Salesforce Integration

- Export CRM Data

- Closed Loop Analytics

In development by Google!



- **Google Analytics 360 and Salesforce Integration**



Steps

1. Export campaign-level data from the ad engine
2. Export spreadsheet from your CRM with:
 - Email
 - Lead Status
 - Converted Date
 - Campaign or Ad ID (Custom Hidden Fields)

Tip! Make sure you use the same date range for both exports.

Tip! Use Google Inspect (CTRL+Shift+I) on your form to see what fields are already available to you.

```
Elements Console Sources Network Performance Memory Application Security Audits
<input type="hidden" name="C_SFDCLastCampaignStatus" value="Responded" >
<input type="hidden" name="C_Document_Download__Most_Recent1" value="FAQs">
<input id="hdnRedir" type="hidden" name="redir_URL">
<input id="hdnAdId" type="hidden" name="C_Ad_ID__Most_Recent1">
<input id="hdnKeyCat" type="hidden" name="C_Keyword_Category__Most_Recent1">
<input id="hdnKey" type="hidden" name="C_Keyword__Most_Recent1">
<input id="hdnVisLoc" type="hidden" name="C_Visitor_Location__Most_Recent_1">
<input id="hdnAdNet" type="hidden" name="C_Ad_Network__Most_Recent1">
<input id="hdnSeaTyp" type="hidden" name="C_Search_Type__Most_Recent1">
<input id="hdnKeyDet" type="hidden" name="C_Keyword__Detailed__Most_Recent1">
<input id="hdnAdGroup" type="hidden" name="adGroup">
```



Steps

3. Merge the two data sets into a single spreadsheet
4. Remove duplicate entries based on email
5. Pivot the data for the metrics you want to analyze

Tip! You can sub campaign out with any attribute that's available between the CRM and ad engine for another type of analysis. 

PivotTable Fields

Choose fields to add to report:

Drag fields between areas below:

 FILTERS

Lead Status

 COLUMNS

Σ Values

 ROWS

Campaign

Σ VALUES

Cost

Conversions

CPA

CVR

Lead Status



Steps

6. Add in formulas for:

- Cost Per Qualified Lead (CPQL) = IFERROR(Cost / QL),0)
- Qualified Lead Rate (QLVR) = IFERROR((QL / Clicks),0)

2017 Engine Metrics					Qualified Lead Metrics		
Campaign	Cost	Conversions	CPA	CVR	Qualified Leads (QL)	Cost Per Qualified Lead (CPQL)	Qualified Lead Rate (QLVR)
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Recap of Steps

1. Export campaign-level data from the ad engine
2. Export spreadsheet from your CRM with:
 - Email
 - Lead Status
 - Converted Date
 - Campaign or Ad ID (Custom Hidden Fields)
3. Merge the two data sets into a single spreadsheet
4. Remove duplicate entries based on email
5. Pivot the data for the metrics you want to analyze
6. Add in formulas for:
 - Cost Per Qualified Lead (CPQL) = $\text{IFERROR}(\text{Cost} / \text{QL}, 0)$
 - Qualified Lead Rate (QLVR) = $\text{IFERROR}((\text{QL} / \text{Clicks}), 0)$



You can do this
same analysis as a:

- Geo Analysis
- Dayparting Analysis
- Device Analysis
- Ad Group Analysis
- Keyword Analysis



GREAT SCOTT



THERE ARE SO MANY OPTIONS



A close-up photograph of a person's hands writing on a white notepad with a yellow and black marker. The person is wearing a blue shirt and a black wristband. The background is blurred, showing a desk and another person's arm.

Key Takeaways

Use a CRM to find campaigns, ad groups, and keywords that drive qualified leads and sales. Then allocate more optimization time and budget to these areas to increase sales further.



Landing Pages



QUICK QUESTION

Are more leads always better?





LEADS

Sales

PPC'er

LEADS EVERYWHERE

50%

of sales time is wasted on unproductive prospecting



Quality over quantity.

Unqualified leads cost you **time, customers,**
and can harm the team **relationship.**



How do we fix this?

Communicate. Figure out what Sales needs to pre-qualify prospects.
Do they need:

Zodiac Sign
Message
Phone Number
Job Title
Last Name
Company
First Name
State
Email
Intended Use
Full Name
Social Security Number
Number of Employees



Form Growth can be Scary

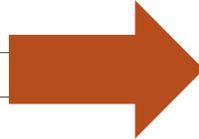
* NAME

COMPANY

* EMAIL

* PHONE

MESSAGE



But there is a Balance

* NAME

COMPANY

* EMAIL

* PHONE

MESSAGE



...and A/B Testing!

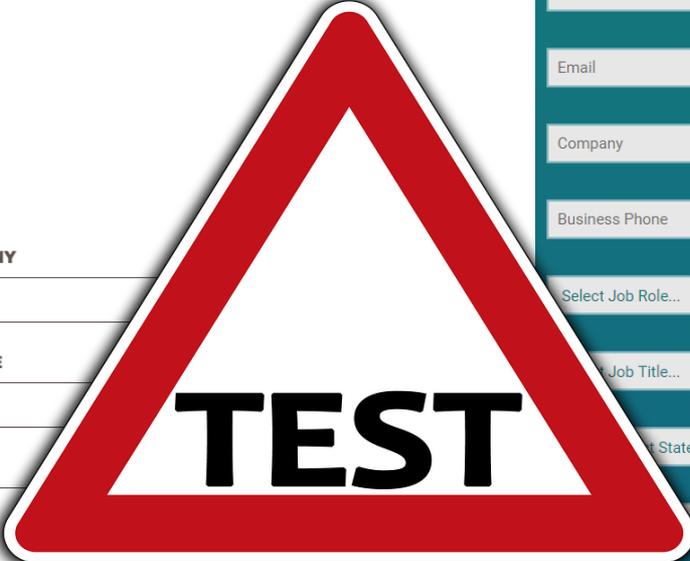
*** NAME**

COMPANY

*** EMAIL**

*** PHONE**

MESSAGE



First Name

Last Name

Email

Company

Business Phone

Select Job Role...

Job Title...

State/Province...

Country...

SUBMIT





Key Takeaways

Connect with the sales team to discuss what they need to be on the landing page(s) to pre-qualify the consumer.

Adequate information will enable the sales team to prioritize leads and focus their time on more qualified leads.



Sales Process



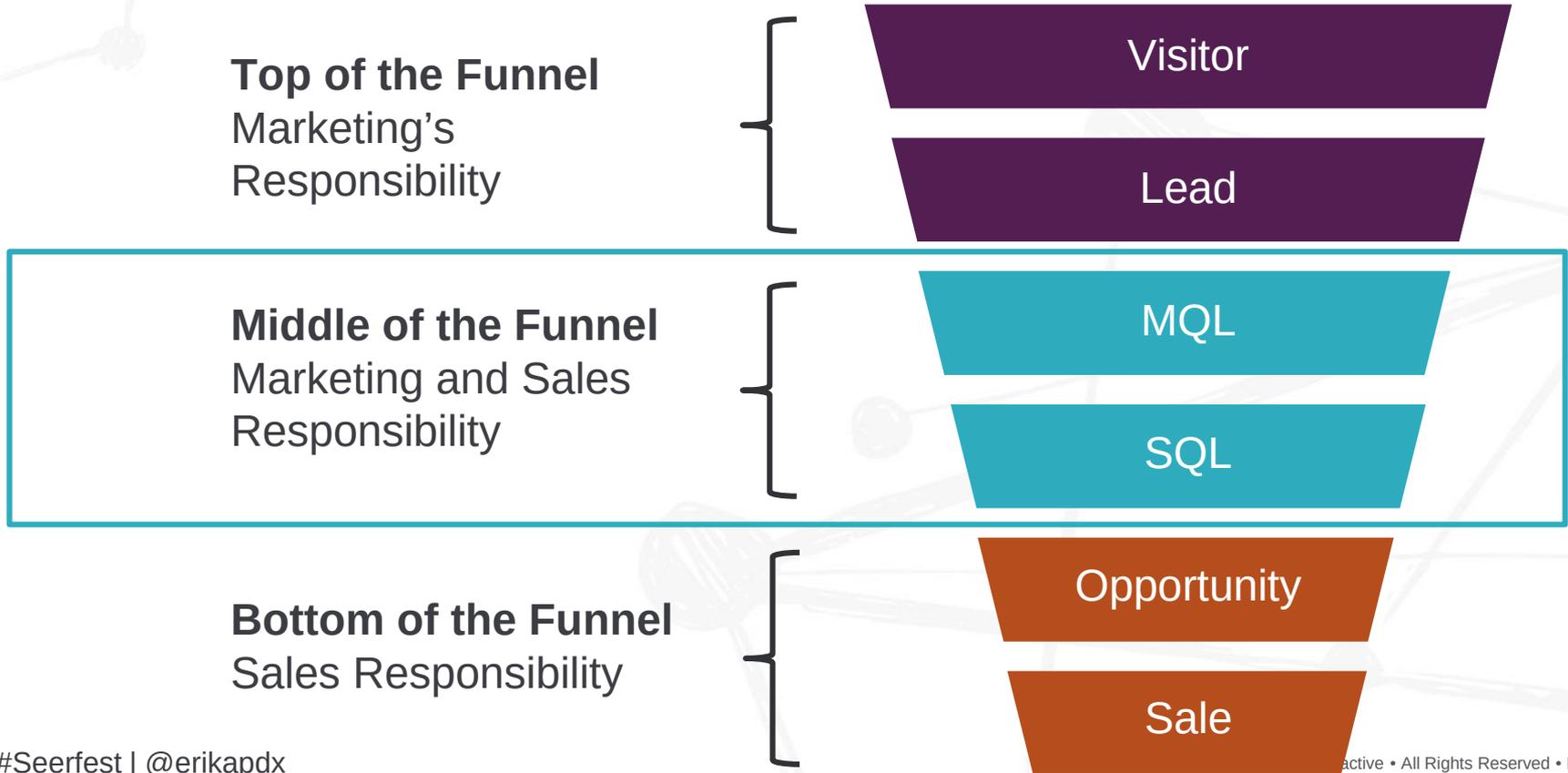
Sales and marketing alignment can
help your company become

67%

better at closing deals



Marketing and Sales Funnel



How can Marketing and Sales work together?



Meet Client Y

Time Lag Analysis: Measures how long it took for a lead to be determined qualified.

Time Lag Analysis

2017 Lead Time Lag	
Days from Lead Creation to Qualification	Qualified Leads
<24 Hours	28
1	13
2	7
3	5
4	1
5	3
6	5
7	3
8	2
9	4
10	1
11	4
12	1
15	1
17	2
19	1
24	1
26	1
28	2
29	2
42	1
43	1
52	1
53	1
57	1
85	1
118	2
123	1
162	1
168	1
176	1
213	1

118	2
123	1
162	1
168	1
176	1
213	1



Meet Client Y

Time Lag Analysis: Measures how long it took for a lead to be determined qualified.

Time Lag Analysis

2017 Lead Time Lag	
Days from Lead Creation to Qualification	Qualified Leads

<24 Hours	28
1	13
2	7
3	5
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6	
7	
8	
9	
10	
11	
12	
13	
14	
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38	
39	
40	
41	
42	
43	
44	
45	
46	
47	
48	
49	
50	
51	
52	1
53	1
57	1
85	1
118	2
123	1
162	1
168	1
176	1
213	1

Oh boy, these are my leads!

	2
	1
162	1
168	1
176	1
213	1



How do I perform a Time Lag Analysis?

1. Export spreadsheet with these attributes:
 - Email
 - Lead Status
 - Lead Created Date
 - Qualified Date
2. Remove duplicate entries based on email
3. In the raw data, create a new **Time Lag** column with this formula:
 - = Qualified Date - Lead Created Date
4. Pivot the data into a table for analysis

The screenshot displays a spreadsheet with the following data:

Created Date	Qualified Date	Time Lag	Lead Status
4/23/2017	11/22/2017		213 Qualified
3/27/2017	9/19/2017	=F3-E3	Qualified
4/24/2017	10/9/2017		168 Qualified
5/10/2017	10/19/2017		162 Qualified
7/15/2017	11/15/2017		123 Qualified
8/23/2017	12/19/2017		118 Qualified
5/11/2017	9/6/2017		118 Qualified

The field list below the spreadsheet shows the following fields:

- Email
- State/Province
- Created Date**
- Converted Lead Created Date(Original Form Submis...
- Time Lag**
- Lead Status**

Drag fields between areas below:

FILTERS	COLUMNS
Lead Status	

ROWS	VALUES
Time Lag	Qualified Leads



Have you ever stepped back and thought...



MAYBE PPC ISN'T THE PROBLEM?



THE LEADS COULD BE QUALIFIED

Meet Client Z

Not Attempted: A lead that the Sales Team has not reached out to yet.

2017 Lead Quality		
Month	Not Attempted	Not Attempted Rate
January	3	1.7%
February	3	1.3%
March	1	0.5%
April	3	1.6%
May	7	4.6%
June	3	5.2%
July	6	8.5%
August	46	20.5%
September	49	27.1%
October	12	15.4%
November	14	21.9%
December	33	68.8%



Meet Client Z

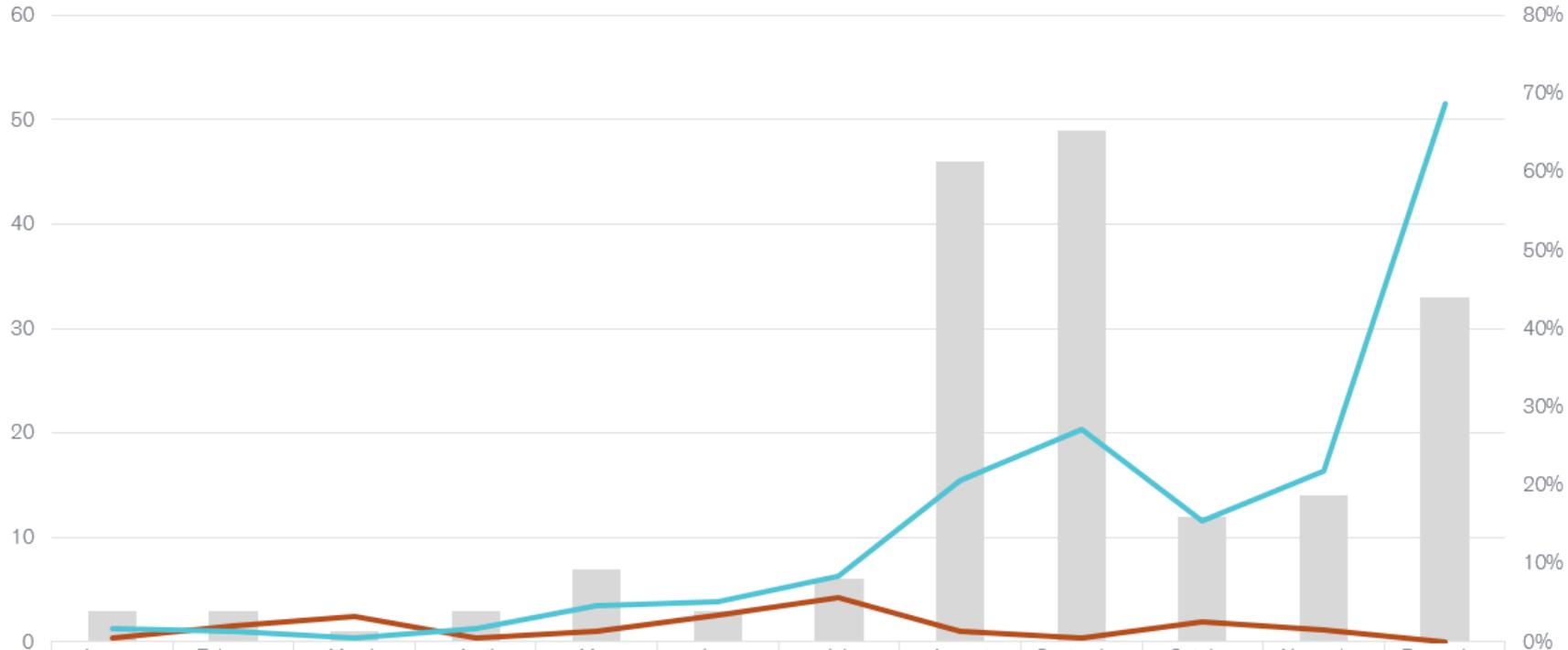
Not Attempted: A lead that the Sales Team has not reached out to yet.

Oh boy, these are my leads!

July	3	1.6%
August	46	20.5%
September	49	27.1%
October	12	15.4%
November	14	21.9%
December	33	68.8%



Not Attempted Rate vs. Qualified Rate



	January	February	March	April	May	June	July	August	September	October	November	December
Not Attempted	3	3	1	3	7	3	6	46	49	12	14	33
Qualified Rate	0.6%	2.1%	3.2%	0.5%	1.3%	3.4%	5.6%	1.3%	0.6%	2.6%	1.6%	0.0%
Not Attempted Rate	1.7%	1.3%	0.5%	1.6%	4.6%	5.2%	8.5%	20.5%	27.1%	15.4%	21.9%	68.8%



Meet Client Z's Sales Team

2017 Lead Quality			
Sales Contact	Not Attempted	Total Leads	Not Attempted Rate by Individual
	11	384	2.9%
	26	303	8.6%
	14	164	8.5%
	14	43	32.6%
	38	42	90.5%
	2	35	5.7%
	14	21	66.7%
	4	19	21.1%
	12	18	66.7%
	5	13	38.5%
	10	11	90.9%
	2	10	20.0%



What do I need to perform these analyses?

1. **FIRST!** You must define a **Not Attempted** lead value for lead status
2. If you are doing a:

Not Attempted Rate Analysis

- Export spreadsheet with:
 - Email
 - Lead Status
 - Lead Created Date

Sales Team Analysis

- Export spreadsheet with:
 - Email
 - Lead Owner
 - Lead Status
 - Lead Created Date

3. Remove duplicate entries based on email
4. Pivot the data into a table for analysis

PivotTable Fields

Choose fields to add to report:

- Team
- Lead ID
- Lead Owner**
- First Name

Drag fields between areas below:

▼ FILTERS

||| COLUMNS

Lead Status ▼

≡ ROWS

Σ VALUES

Lead Owner ▼

Lead Created Date ▼



Key Takeaways

Utilize the CRM to identify factors for **why leads aren't turning sales.**

PPC may not always be the reason, but further analysis can reveal insights that lead to cross-team strategies to order to increase sales.



LEAD GEN CRM INTEGRATION

SO HOT RIGHT NOW



Your Mission

1. If you don't have access to CRM data, then make a case to get it!
2. Run analyses to determine what campaigns are driving qualified leads and pivot strategy accordingly
3. Talk to the Sales Team to understand what they need to pre-qualify prospects
4. Use your newfound insights to work with the client to strengthen the sales process
5. Continually pivot strategies, test, and analyze



That's all fellow Marketers

THANK YOU

You all rock!

