

Tracking customer touchpoints

A guide to tracking your leads throughout the entire buyer's journey to understand your marketing impact.



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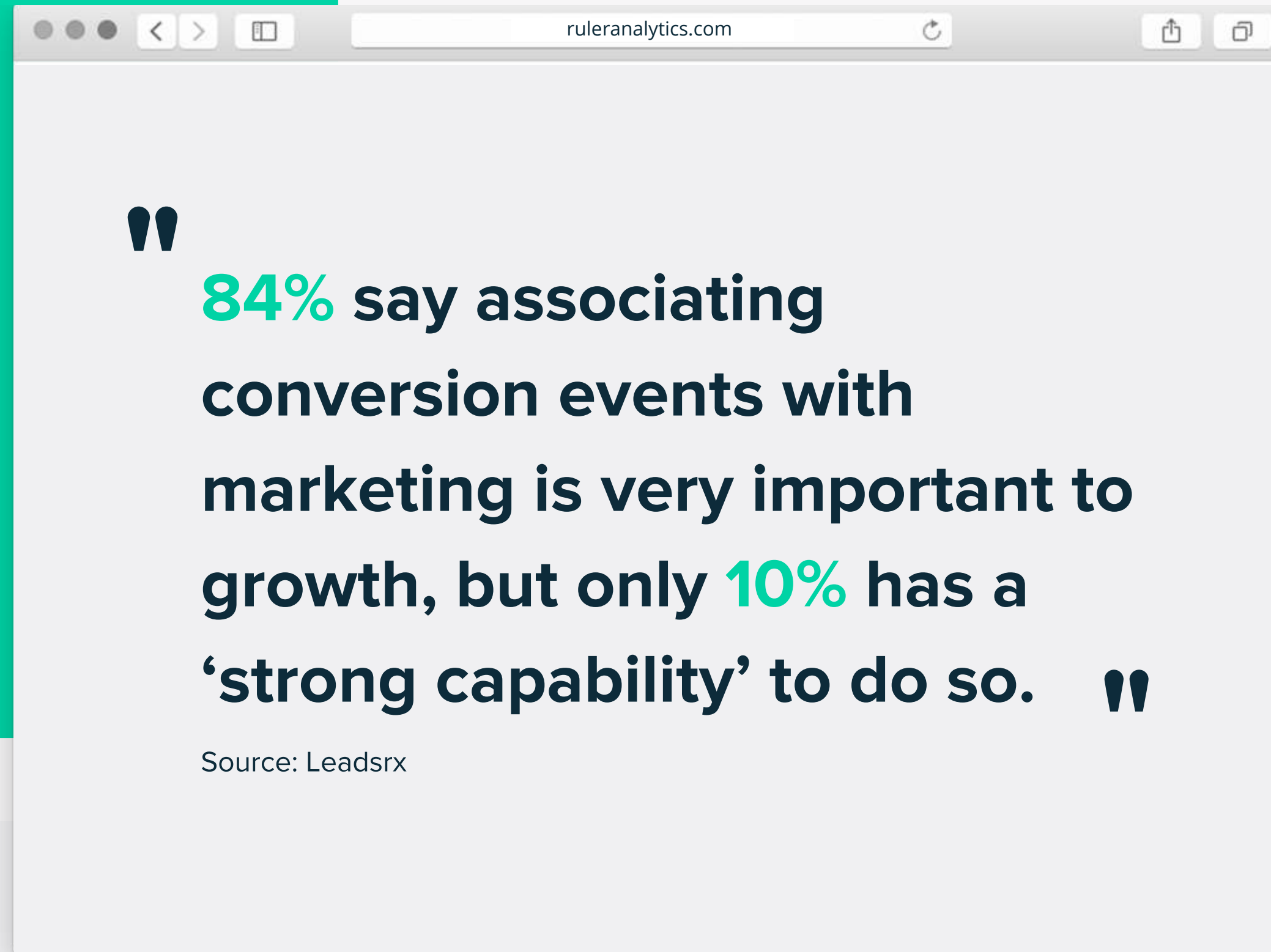
Introduction

Do you struggle to understand how a website visitor moves down the funnel to become a lead and then a customer?

Tracking every step each individual customer takes, and understanding which marketing channel or campaign has influenced them, is hard work.

In this eBook, we walk you through what a buyer's journey is, what touchpoints your customers could be experiencing and to round it off, how to track them all.

Let's get started.



Introduction to the buyer's journey

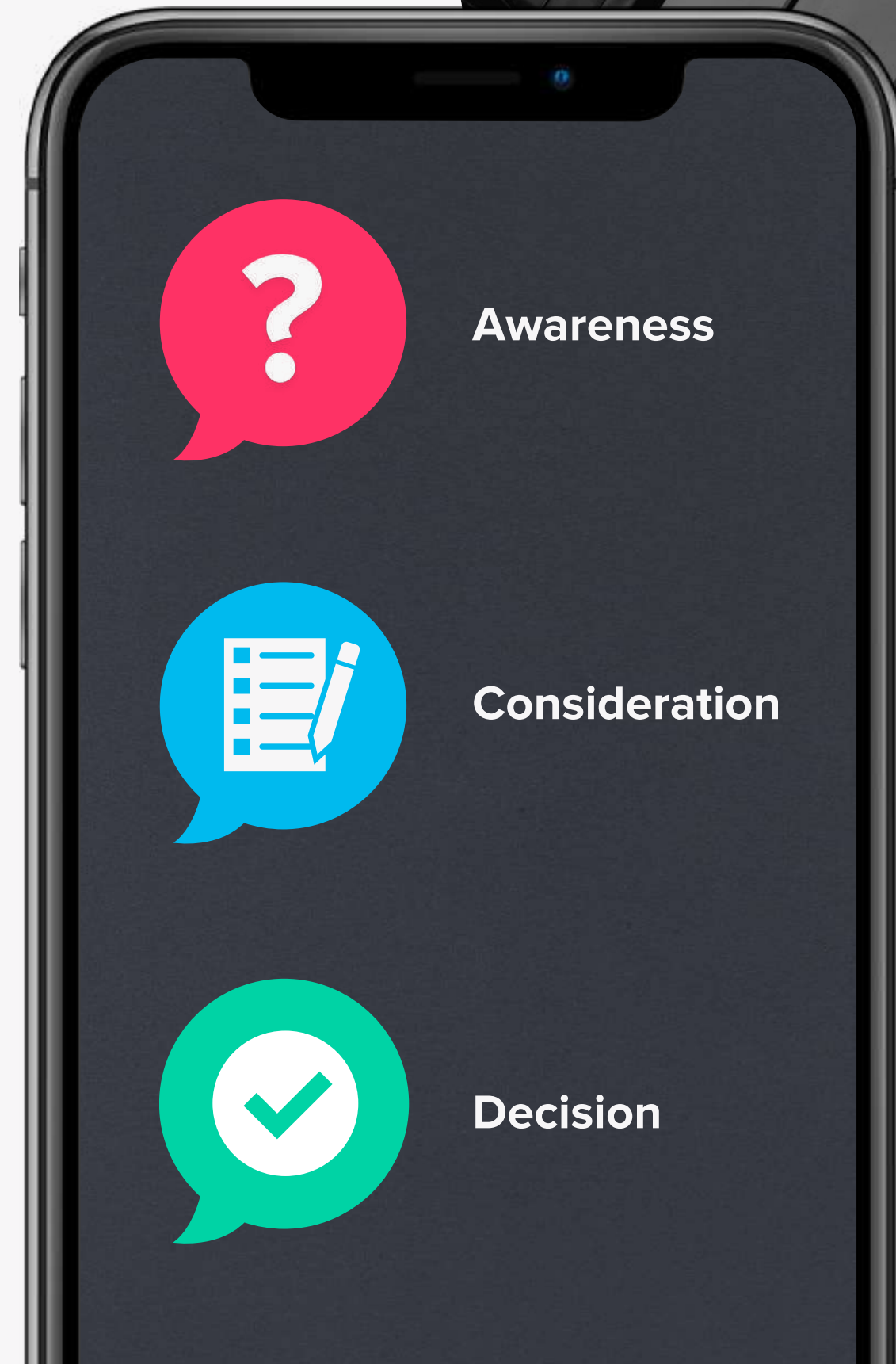
We've all heard of a marketing funnel, right?

Many marketers use a marketing funnel to define their user journey. Website users enter at the top of the funnel. Your job as a marketing professional is to guide that user down the funnel to eventually become a customer.

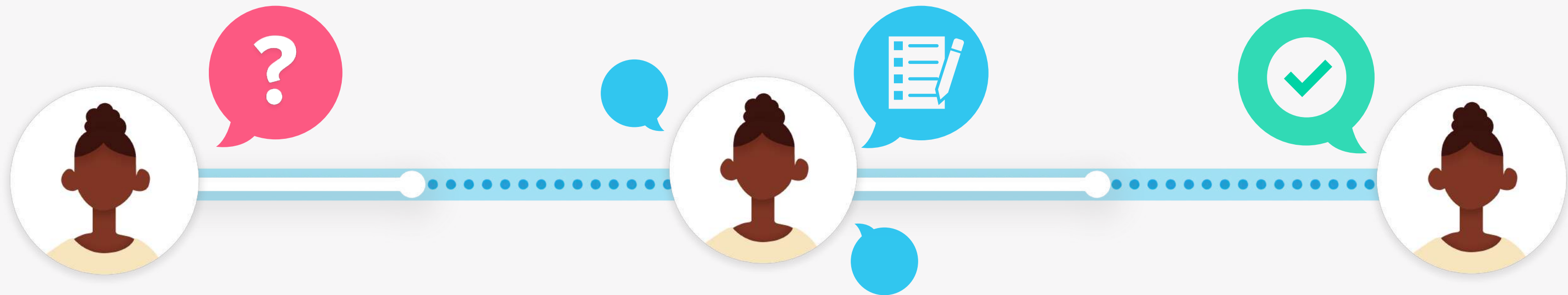
Here at Ruler, we like to look at this journey in a slightly different way.

The buyer's journey still consists of three distinct phases:

- The awareness stage,
- The consideration stage
- The decision stage.



The buyer's journey



01

Awareness stage

Here, a user is looking for a solution to a problem. They might not know what product they are ultimately looking for and so this is purely an information-gathering stage.

02

Consideration stage

The user now knows what product they need to solve their problem. But, they're now considering many different brands all offering the same product or service.

03

Decision stage

Lastly, the user makes a decision on a particular product or brand and so purchases.



What content to use in the buyer's journey?

There are plenty of channels and types of content you can use to be seen within each of these stages.

We generally suggest the following...



SEO content, paid advertising and strong organic social for the awareness stage to get your brand and product out there.



Comparisons, detailed reviews, email marketing and explainer videos for the consideration stage to push your product to front of mind.



Offers and discounts, free trials or even just targeted advertising for the decision stage to promote a sale.



Buyers are most likely to speak to sales during the consideration stage.



Source: Hubspot

How many touchpoints are needed to convert a lead into a customer?

As a consumer yourself, you know that you rarely buy products as soon as you're made aware of them.

And even if you do have prior knowledge of a product or service, you might still want to do further research before committing.

This is where touchpoints come in.

Ok, so we know what a buyer's journey is. It's three stages used by marketers to understand a user's journey from prospect to customer.

But while there are only three stages, each stage could have multiple touchpoints.

What touchpoints can occur in the buyer's journey?

So now we know:

- what the buyer's journey is
- what touchpoints are, and
- how the two work together to move a user from prospect to lead to customer.

But, what touchpoints can occur in the buyer's journey?

Let's take a look.

Touchpoints:



Newsletter subscription



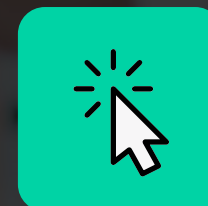
Contact us form



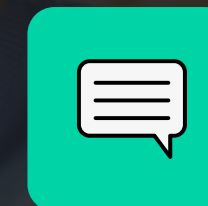
Email



Phone call



Paid Advertisement



Live chat

These are just some of the touchpoints that a user can have with your business.

How do you go about tracking each and every step when there are so many potential steps a user might take?

Now you might be thinking, we can track email open rate.

We can track social media impressions. We can even track phone calls with click-to-call metrics.

But can you understand the role each channel plays both individually and as part of a whole? Probably not.

How to track touchpoints

Why tracking is so important

Without proper reporting, how can you optimise your marketing and understand what sales your team is bringing in?

While tracking vanity metrics that highlight the potential of your marketing is useful - that's clicks, impressions, open rate etc, you need to go beyond that.

And we mean beyond tracking lead generation too. Don't get us wrong, tracking form submissions and phone calls is a must, but it's not enough.

You need to be tracking revenue.

“

89% of marketers ranked improving the ability to measure and analyze marketing impact as a top priority.

Source: Responsify

”



Issues with tracking online conversions

Online conversions are easy to track, right? Wrong. There are two key issues you may still face:

Understanding attribution with long sales cycles

Let's use an example.

You've set up a pay-per-click advertising campaign, and you see it gets 100 clicks and 20 conversions. Not bad right?

But what about people who viewed your ad, but didn't click? Perhaps some of those users returned to your site at a later date and converted then. In this scenario, PPC helped drive the lead, but in acquisition, it would get no credit. And what about those who did click on the ad, but didn't convert?

Again, you have the same problem! They could interact with your business three more times, and have already engaged three times, meaning your attribution for the eventual lead will be wrong.

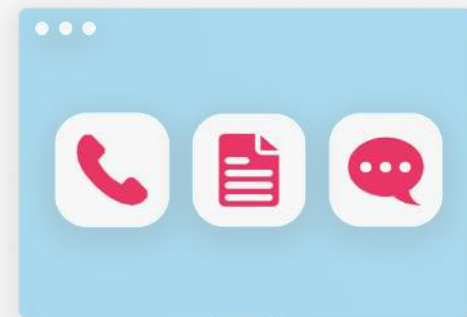
Bypassing the 90 day limitation in analytics dashboards

And we know it's frustrating that Google Ads and Google Analytics (to name but a few) have a 90 day limitation on their analytics.

That means, if a user converts after the 90 days then you won't be able to properly attribute their data even if they purchased directly from your website.

But don't worry, we're going to show you how to solve this problem.

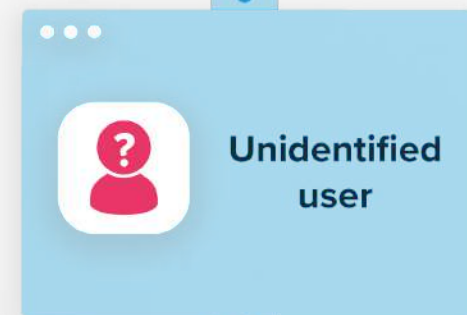




1

Website visit

Traditional analytics only track web conversions ...



2

Unidentified user

... and they don't show you the identity of the user ...



3

Unattributed revenue

... making it difficult to connect revenue to the lead origin.



Issues with tracking offline conversions

And if all that wasn't enough to worry about when it comes to tracking, there are offline conversions too.

We're talking emails, phone calls, store visits.

While it's great your business is getting inbound leads and sales via a variety of mediums, understanding how your marketing is influencing them is impossible without marketing attribution.

And that goes for tricky conversions like live chat and form submissions too.

While you might be able to count for the number of form submissions in Google Analytics, these leads stay anonymous. So, you can't understand which leads are high-quality or not.

And even worse, you can't see which leads go on to bring in revenue

“
**Attribution
provides efficiency
gains of 15-30%**”

Source: Leadsrx



Understanding marketing attribution

What is marketing attribution?

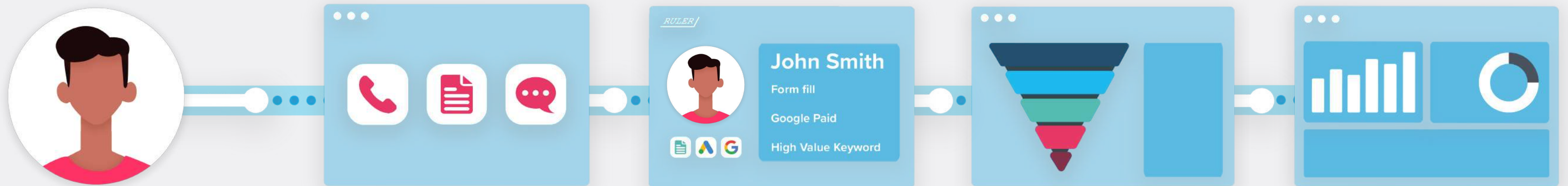
Marketing attribution (MA) is a set of rules that helps you, as a marketer, determine the role channels have played in your lead and sales generation.

Ruler Analytics is a marketing attribution tool which takes all the hard work and guesswork out of reporting.

Lets see how it works...



How Ruler's closed loop works



01

Traffic

Ruler tracks each anonymous visitor to the website over multiple sessions, traffic sources and keywords.

02

Website

When a visitor converts via form, call tracking or live chat on your website, their data is captured.

03

Matching

Ruler matches the real user's details with their marketing touchpoints.

04

Integration

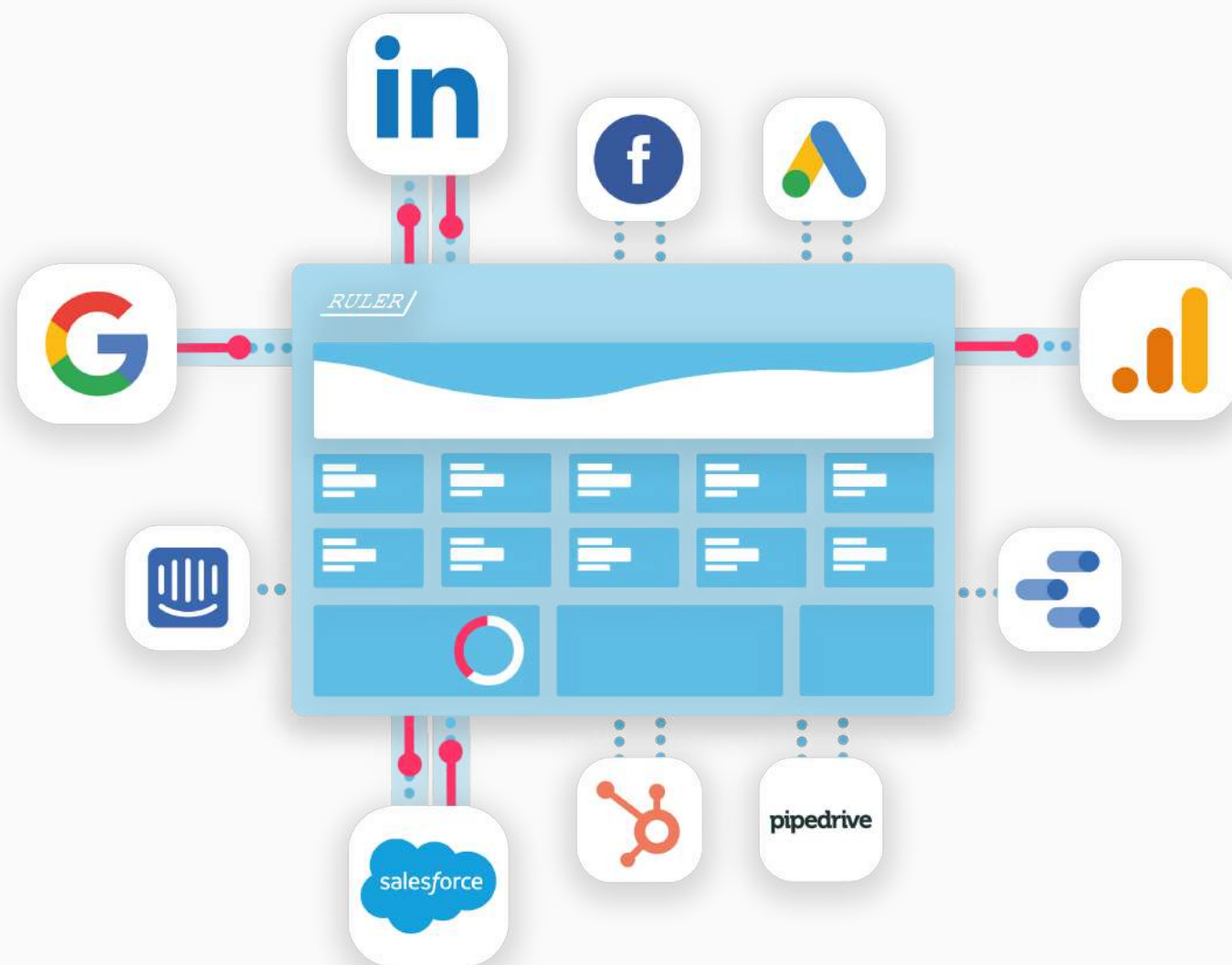
The marketing and conversion data is sent to your CRM or sales tools. Marketing data includes channel, source, campaign, keyword and/or landing page.

05

Close the Loop

Upon conversion, revenue is attributed to the channels, campaigns and keywords that influenced it and can be fired into the marketing apps you choose.

Ruler's dashboard



How Ruler allows you to track the full buyer's journey

So, how does marketing attribution help you understand your buyer's journey?

It's simple.

Ruler tracks every anonymous user, collecting and collating data on website visitors and fires them to your CRM when they convert into a lead.

That means, you can see individual customer journeys directly in Ruler.

From there, you'll get a true understanding of which campaigns and channels are directly affecting lead generation.

But it goes one further. When you update your CRM with revenue data once the sale is closed, Ruler will fire that into your analytics dashboards.

This means that you can now see which leads are staying put as leads, and which are closing. So, you can start to identify micro-conversions that affect your sales. You can see the true role each channel is playing, which is particularly important if you're using paid advertising.



How Ruler takes the manual labour out of reporting

Creating marketing reports isn't fun. That's why they always get left to the last minute.

They feel extra tedious because you spend hours compiling data which is then not used. Your marketing reports should be used to hold you accountable. Your reports should help your business make data-driven decisions.

This is where Ruler can help.

Not only do we track all of your website visitors and update data in your CRM and marketing apps, but also provide the perfect stats for any marketing report.

Want to definitively prove your ROI? With Ruler, now you can. You can say, with confidence, “marketing brought this many sales in last month”.

Take the guesswork out of your marketing reports and use attribution to understand what's truly working.

googleanalytics.com

Searching "Top countries by users"

Sort Type: Default

advanced

	Acquisition			Behaviour			Conversions		
	Users ?	New Users ?	Sessions ?	Bounce Rate ?	Pages/Session ?	Avg. Session Duration ?	Webchat transcripts (Goal 9 Conversion Rate) ?	Webchat transcripts (Goal 9 Completions) ?	Webchat transcripts (Goal 9 Value) ?
	10,372,668 % of Total: 100.00% (10,372,668)	10,216,635 % of Total: 100.01% (10,215,779)	14,863,661 % of Total: 100.00% (14,863,661)	69.80% Avg for View: 69.80% (0.00%)	1.24 Avg for View: 1.24 (0.00%)	00:00:41 Avg for View: 00:00:41 (0.00%)	0.07% Avg for View: 0.07% (0.00%)	9,806 % of Total: 100.00% (9,806)	£9,806.00 % of Total: 100.00% (£9,806.00)
	7,924,011 (75.23%)	7,724,907 (75.61%)	11,578,023 (77.89%)	75.20%	1.15	00:00:32	<0.01%	569 (5.80%)	£569.00 (5.80%)
	1,072,878 (10.19%)	1,032,642 (10.11%)	1,326,803 (8.93%)	31.50%	1.60	00:01:17	0.38%	5,016 (51.15%)	£5,016.00 (51.15%)
	848,005 (8.05%)	800,823 (7.84%)	1,118,323 (7.52%)	60.90%	1.66	00:01:16	0.25%	2,805 (28.60%)	£2,805.00 (28.60%)
	470,494 (4.47%)	474,797 (4.65%)	568,747 (3.83%)	69.70%	1.35	00:00:43	0.10%	586 (5.98%)	£586.00 (5.98%)
	79,845 (0.76%)	54,662 (0.54%)	99,368 (0.67%)	52.43%	1.78	00:01:17	0.47%	466 (4.75%)	£466.00 (4.75%)
	61,666 (0.59%)	58,023 (0.57%)	72,219 (0.49%)	81.99%	1.23	00:00:45	0.20%	148 (1.51%)	£148.00 (1.51%)
	54,751 (0.52%)	52,692 (0.52%)	60,629 (0.41%)	74.41%	1.20	00:00:27	0.23%	142 (1.45%)	£142.00 (1.45%)
	7,495 (0.07%)	6,670 (0.07%)	9,222 (0.06%)	82.39%	1.33	00:00:35	0.00%	0 (0.00%)	£0.00 (0.00%)
	4,956 (0.05%)	4,152 (0.04%)	6,468 (0.04%)	52.10%	1.81	00:01:46	0.63%	41 (0.42%)	£41.00 (0.42%)
	4,554 (0.04%)	3,938 (0.04%)	7,561 (0.05%)	36.91%	1.83	00:02:19	0.16%	12 (0.12%)	£12.00 (0.12%)

Show rows: 10 Go to: 1 1-10 of 15

This report was generated on 06/11/2020 at 09:50:17 - Refresh Report

Marketing attribution and the customer journey

Tracking conversions within a customer journey

To better explain how you're losing data at every intersection, we're going to take you through an example buyer's journey.

Our user, Dan, visits your site from various sources and eventually converts into a sale. Let's dig into the problems you and your business could face in this particular customer journey, and the data you'll lose along the way.

This particular customer journey lasts ten weeks in total.



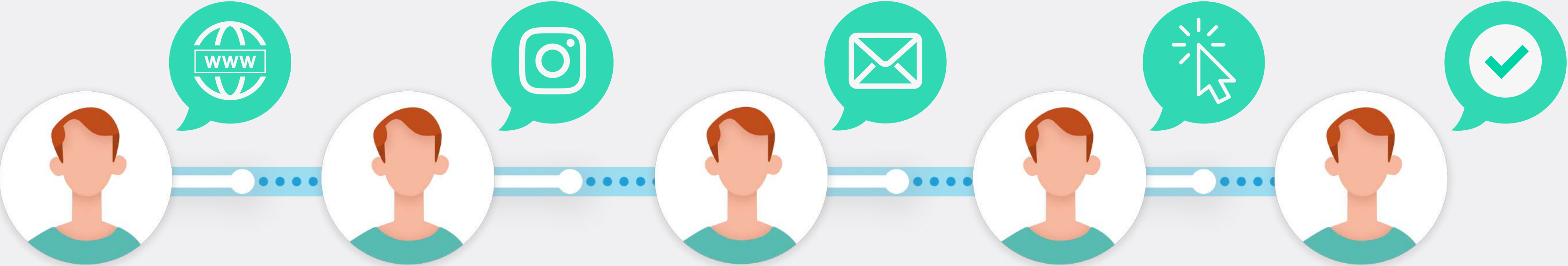
“

78% of marketers plan to adapt or increase use of cross-channel attribution

”

Source: Zoominfo

Customer journey



01

1st interaction

Dan finds your site through organic search

02

3 weeks later

He then revisits your site through social referral and downloads an E-book

03

2 weeks later

Dan revisits your site via an email referral

04

3 weeks later

He is then retargeted with a PPC campaign and clicks but no further action

05

2 weeks later

Dan then revisits your site directly with multiple sessions and converts to a customer

01

Organic referral

Dan finds your website initially via an organic search where an SEO-optimised blog comes up in the top results for his searched key term.

However, Dan doesn't act on this visit.

What data have we lost?

Well, if you're a content marketer, you're not getting oversight that your blogs are leading to anything.

While you might be tracking web sessions, time on page and maybe conversions, that's probably direct on that page. You won't be able to get oversight of how a blog viewer ultimately becomes revenue.

02

Social referral

Dan is browsing Instagram, when a post of yours comes up under a hashtag he follows. He clicks on your account, and through to your website.

The link was organically promoting an eBook you've created, so Dan goes and downloads it.

He is now a lead.

What data have we lost?

Again, as a content marketer, you've spent a long time working on lead magnets. But without closed loop marketing, you won't be able to see whether a download results in a sale.

So, you can't get a true return on investment for the time spent on your eBook. After all, while it's getting contacts into your CRM, is it resulting in revenue?



03

Email referral

Dan downloaded an eBook and as such was entered into an email cadence to try and convert those leads into revenue.

What data have we lost?

As a marketer, you'll be tracking the open rate and click-through rate of this email.

But while you know Dan has clicked on the link in your cadence, unless he converts directly, you won't know (without a lot of digging), that email affected his eventual decision to convert.

04

Retargeted PPC campaign

Dan has been on your website on three occasions now. Your PPC marketer creates a retargeting campaign to try and convert anyone who has visited the pricing page on your website.

Dan is targeted, and clicks through to the site. But, he doesn't convert.

What data have we lost?

While you might be tracking clicks, impressions and perhaps even conversions, this doesn't prove success. And while revenue will be low, as Dan (and many others targeted) won't convert directly, this means you're missing key data on the impact of your ads.

Without marketing attribution, you can't provide a true return on your ad spend as you're not tracking how it impacts further down the journey. Without ROAS, management could stop the budget for paid advertising as it's not "bringing in revenue".



05

Direct session

Dan has visited your website four times now over ten weeks, and now, he's ready to convert. He views a number of different pages on your website, and clicks to call you.

What data have we lost?

Dan converts via a phone call to your business. While you might be tracking click to calls on your website, how do you understand which calls lead to revenue?

If you're not tracking, or recording, your inbound calls, how can you understand what's bringing in revenue and what isn't? And how can you pinpoint how marketing affects your rate of high-quality inbound leads via phone call?



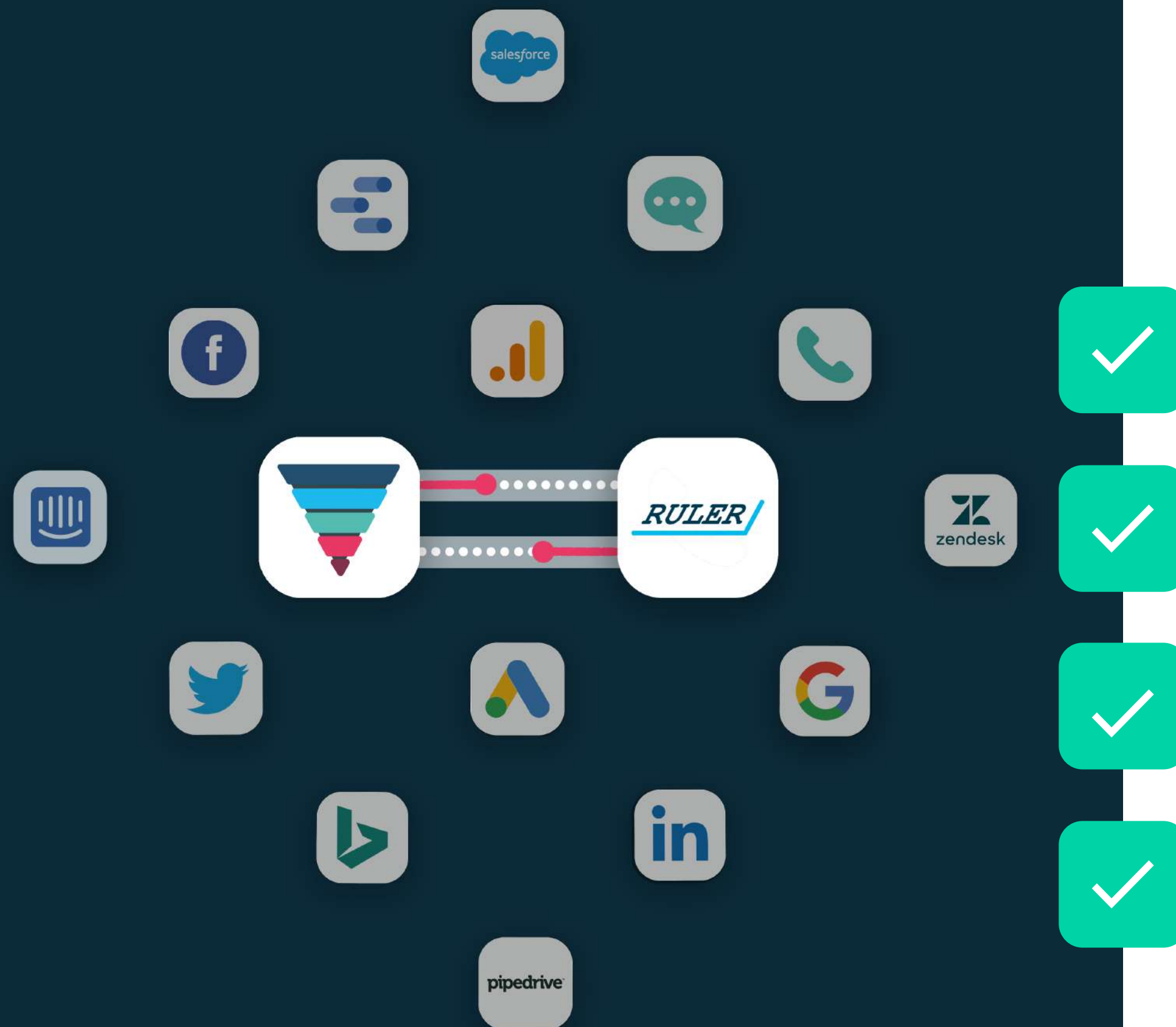
Enter Ruler

Ruler will track every touchpoint a user has with your company, that's when they're anonymous, when they've become a lead, and even after they've converted.

Ruler will fire relevant data on your lead over to your CRM, and it will fire revenue data from closed opportunities back to your analytics software, essentially closing the loop.

And even better, Ruler will build up customer journeys for each of your leads and sales.

So, you can see what journeys are happening often, and identify the channels that are working best for each stage of the customer journey. Not only that, but you can identify micro-conversions that work well to drive that journey even quicker.



What Ruler can do

Ruler can help solve the data gap between your sales and marketing. We can:

Track

Track form submissions, phone calls and live chat, match them to the marketing channel, campaign and keywords which drove the lead.

Enrich your CRM

Enrich your CRM with first-click last-click marketing source variables tracked to individual visitors interaction

Pass through additional variables

Pass through additional variables including marketing source, keyword, campaign, UTMs, GCLID

Integrate with over 1000+ platforms

Ruler can also integrate with over 1000+ other platforms including Google Ads, Google Analytics, Salesforce and more.

Ruler can also integrate marketing data with your products via native integrations, Webhook or SQL.

How can Ruler Analytics help you?

Tracking a full customer journey is hard work. When a potential customer could be engaging with your content hundreds of times, ensuring each touchpoint is tracked requires a lot of guesswork without proper tracking.

Thankfully, Ruler can take away that guesswork, and make it easy. It'll store, record and fire all the data you need, where you need it most.

Book a demo to find out how to implement Ruler's marketing attribution software and help you track full customer journeys.

Want to find out more?

Book a demo with Ruler's attribution experts today at

www.ruleranalytics.com