



Adestra Conversion Tracker Configuration & Consultation



Agenda

1. Conversion Tracker overview
2. Our process
3. Set-Up & Configuration Steps
4. Exercise



1

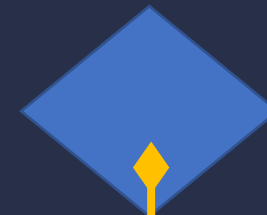
Conversion Tracker Overview



A decorative pattern of white-outlined cubes in the top-left corner.

What is a conversion?

- Transaction-based
- Action-based
- Ecommerce component
- Payment-driven
- Any activity that results in measurable value to your organization



A member, customer, or prospect **taking action** on your goal.

A decorative pattern of white-outlined cubes in the bottom-right corner.


A decorative pattern of white-outlined cubes in the top-left corner.

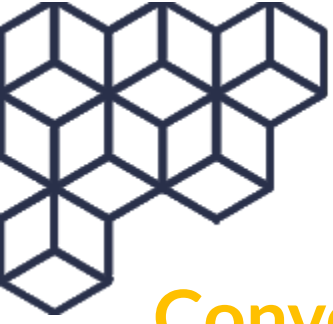
What is conversion tracker?

A blue diamond shape with a yellow line extending downwards from its bottom vertex.

Conversion Tracker

Is a method of tracking the journey when a customer, member, or prospect takes the desired action and attributes the conversion back to the email send.

A decorative pattern of white-outlined cubes in the bottom-right corner.



Conversion examples:

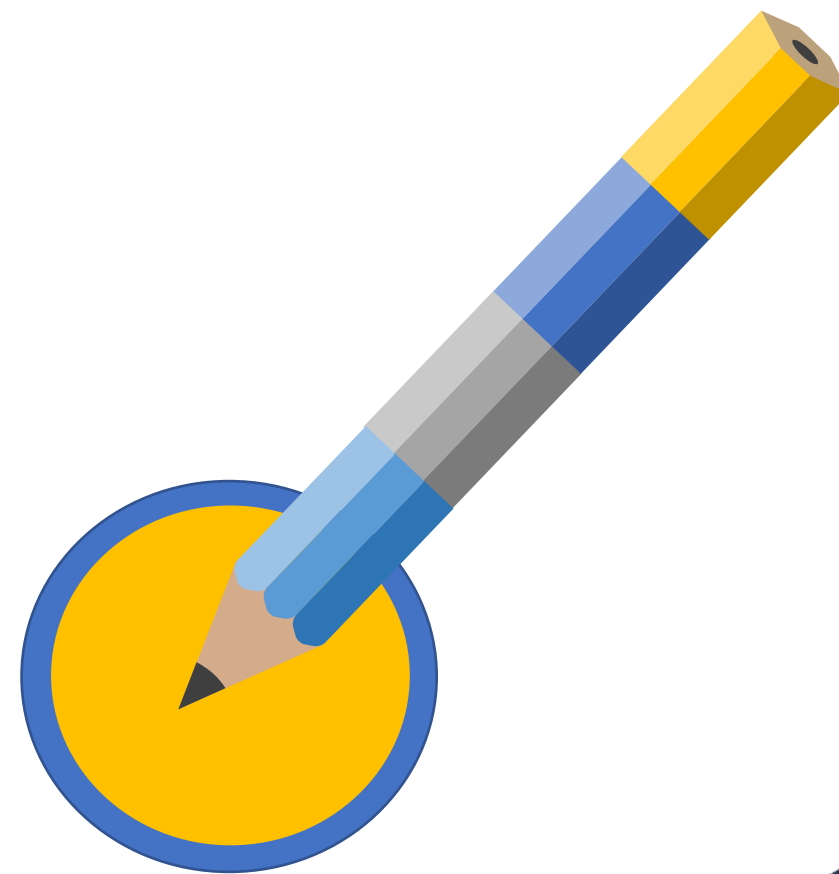
- Membership renewal or Member join
- Townhall & Zoom meetings
- Signature Events (Conferences)
- Seminars (Virtual & In-Person)
- CPE Courses
- 24/7 On-Demand CPE Courses subscription
- Form Fill (Prospects)
- Form Fill (Volunteering)
- Scholarship
- Certifications





Ways to use the Conversion Tracker Data

- Run an Export Manager report on the overall email program at a regular cadence to attribute X dollars (ROI) to your email promotions
- Automation program scenario: Because you clicked from my emails and made it 50% of the way through the journey on my website (but didn't convert) then I want to nurture you to in one of my warm leads drip campaigns
- Automation program scenario: Because you clicked from my emails and made it 100% of the way through the journey on my website (but didn't convert) then I want to nurture you to in one of my warm hot drip campaigns



Conversion Tracker

How it works.



Webinar Promotional Email
\$100 per registration



Opens and clicks on links

- Webinar Summary Page
- Webinar Details Page
- Webinar Check Out Page



www



Page 1:

Main
Storefront

25%

completion



Page 2:

Featured
Webinar

50%

completion



Page 3:

Add
to Basket

75%

completion

CONVERSION



100%

completion



Tracker vs. Capture

Tracker

- Customer took an action
- Originates from an email
- Valuable for Attribution & Analytics
- Further automation is required



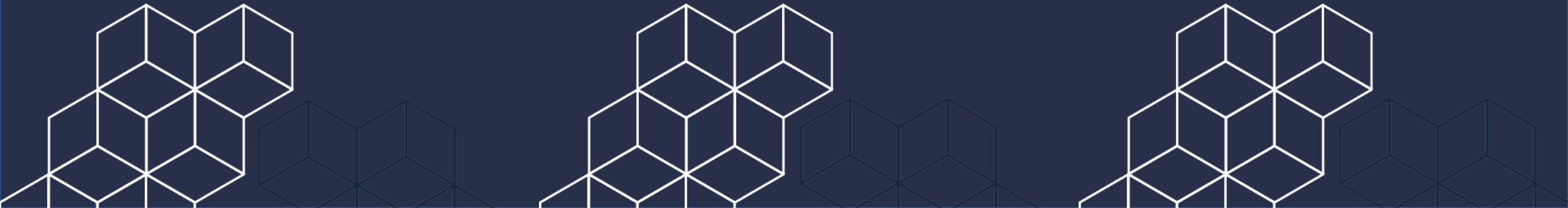
Capture

- Customer didn't take an action
- Originates from outside email
- Valuable for recovering abandoned carts
- Triggers timely, personalized emails when a customer fails to check out



2

Our process



What HRS will do

- Activate Conversion Tracker in workspace
- Develop web code based on requirements collected
- Provide training and support on Conversion Tracker and Reporting

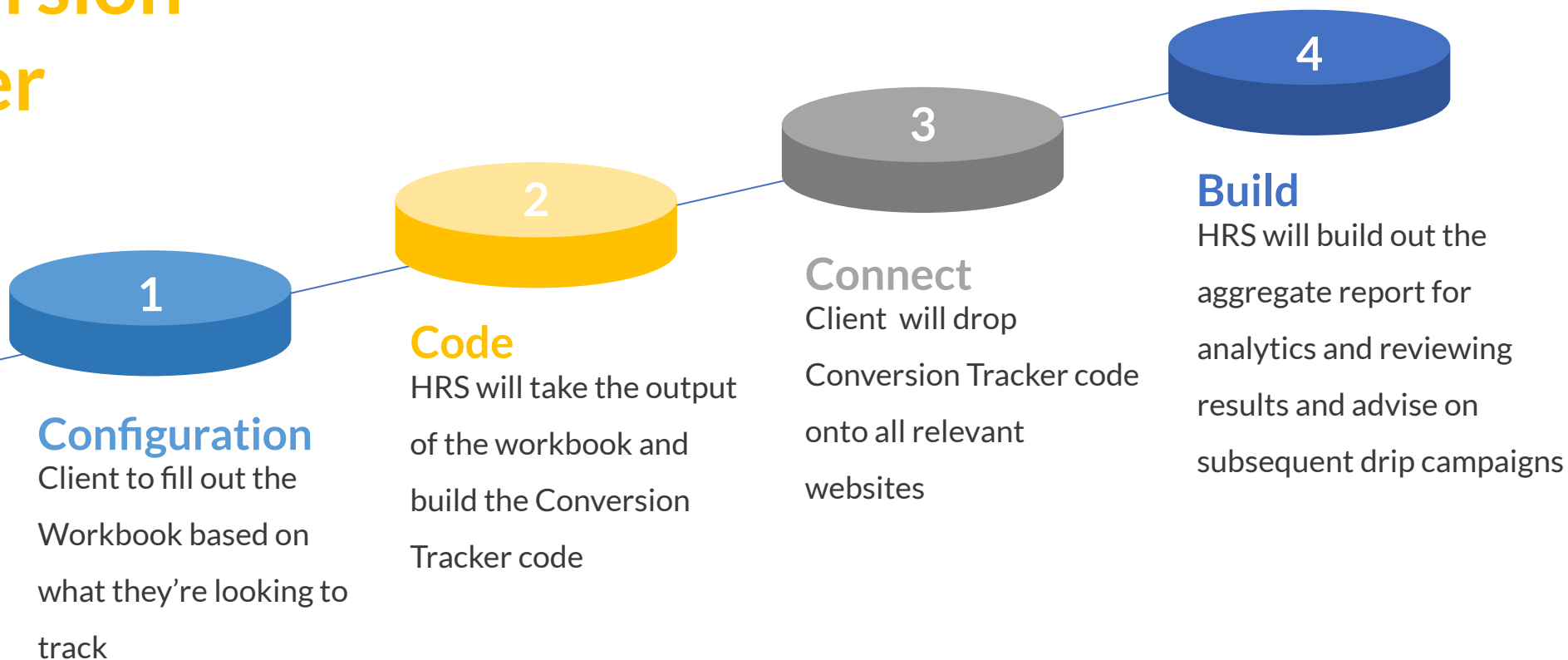


What Client will do

- Complete Conversion Tracker Workbook
- Drop web code on website and tag the page types (ie event page, product page) identified as steps in the journey



Conversion Tracker Steps



the what: marketing

the how: tech



3

Set-Up



What reporting you'll start to see



Conversions

[Back to EDWEB121320WOW](#)

Summary Links Inbound Conversion Social Timeline Heatmap Email Clients Geo Tracking Saved Reports

 Your account has a data retention period of 24 months. Because of this, only conversions occurred during the last 24 months are included here.



Showing data for launches between 01 Dec 2020 00:00 and 6 seconds ago. [Clear filter](#)

Subject: Webinars of the Week









Total: 11,147

Delivered: 10,603

Opened: 2,089

Clicked: 197

Conversion Summary

Conversion Tag	Contacts	Conversions	Quantity	Value	Average
01 course search	51 	155	155	15.50	0.10
01 landing page	3 	6	6	0.90	0.15
02 course description	103 	213	213	53.25	0.25
03 login	25 	54	54	18.90	0.35
04 cart	33 	78	78	39.00	0.50
05 checkout/payment	33 	59	59	44.25	0.75
06 thank you	30 	49	49	2393.00	48.84
default	121 	397	397	0.00	0.00



Organized by Conversion Tag



ROI written back at 100% completion of journey (i.e. 10 Confirmation)



Incomplete journeys still show value


What your report might look like



B	D	E	F	G	K	L
first_name	member_type	birthday	gender	campaign_name	conv_page_tag	conv_value
Russell	Member - Fellow	1953-07-29	Male	2020 - Top Picks - Pub Prac & Industry	10 confirmation	289
Paul	Member - Fellow	1948-02-28	Male	2020 - Law and Ethics - Sept - Dec	10 confirmation	149
Frank	Member - Fellow	1984-11-12	Male	2020 - Membership+ - Dec email	10 confirmation	0
John	Member - Fellow	1950-08-22	Male	2020 - Membership+ - Dec email	10 confirmation	0
Victoria	Former Member	1969-02-08	Female	2020 - Law and Ethics - Dec	10 confirmation	149
Maureen	Member - Fellow	1960-06-30	Female	2020 - B&I State of Profession - 1	10 confirmation	149
Alan	Member - Fellow		Male	2020 Holiday Card - Members	10 confirmation	49
Maryana	Member - CPA Candidate	1985-11-29	Female	2020 - CPA Exam Prep #2	10 confirmation	0
Maureen	Member - Fellow	1959-05-11	Female	2020 Holiday Card - Members	10 confirmation	149
Mary	Member - Fellow	1957-07-30	Female	2020 - Law and Ethics - Nov - Dec	10 confirmation	0
Thomas	Member - Fellow	1955-11-24	Male	2020 - Top Picks - Pub Prac & Industry	10 confirmation	289
Tina	Member - Fellow	1960-09-10	Female	2020 - B&I State of Profession - 2	10 confirmation	0
Dawn	Member - Fellow		Female	2020 - Annual Tax #2	10 confirmation	99
Tina	Member - Fellow	1960-09-10	Female	2020 - B&I State of Profession - 2	10 confirmation	0
Stephen	Member - Fellow	1961-06-10	Male	2020 Holiday Card - Members	10 confirmation	49
Daniel	Member - Fellow		Male	2020 - B&I State of Profession - 1	10 confirmation	0
Cynthia	Member - Fellow	1964-11-09	Female	2020 - Membership+ - Nov email	10 confirmation	0
Stephen	Member - Fellow	1961-06-10	Male	2020 Holiday Card - Members	10 confirmation	0
Harry	Member - Fellow		Male	2020 - AOI Updates Request - 1	10 confirmation	75
						\$118,006.40

 30 day report

 \$118k ROI

 Ability to sort by project, campaigns, include other demographic information



Definitions:



Tag: This defines the page and information you want to record.



Value: You can add a value when you are recording transactional data.



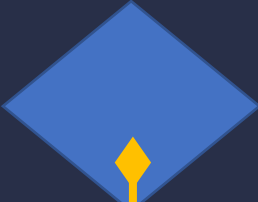
Quantity: A quantity can be added for processes that involve multiple buys or downloads.



Order: For transactional processes visitors may be given order numbers which can also be recorded.



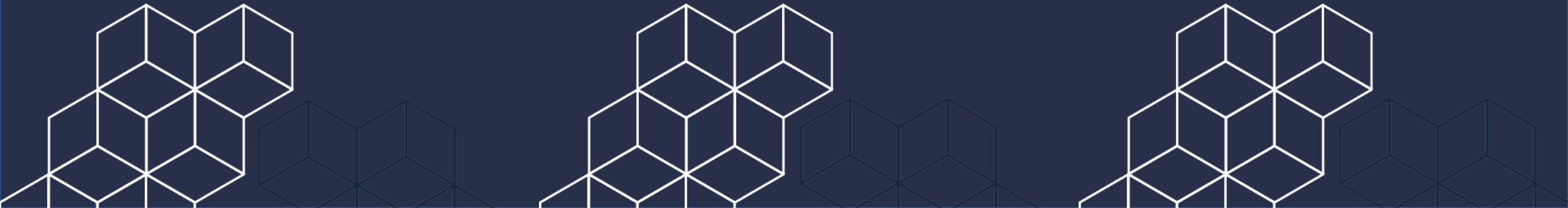
Your script might look like this:



```
<script  
src="https://apps4.highroads  
olution.com/clients/CLIENT/  
scripts/CLIENT_tracker.js"><  
/script>
```

4

Exercise





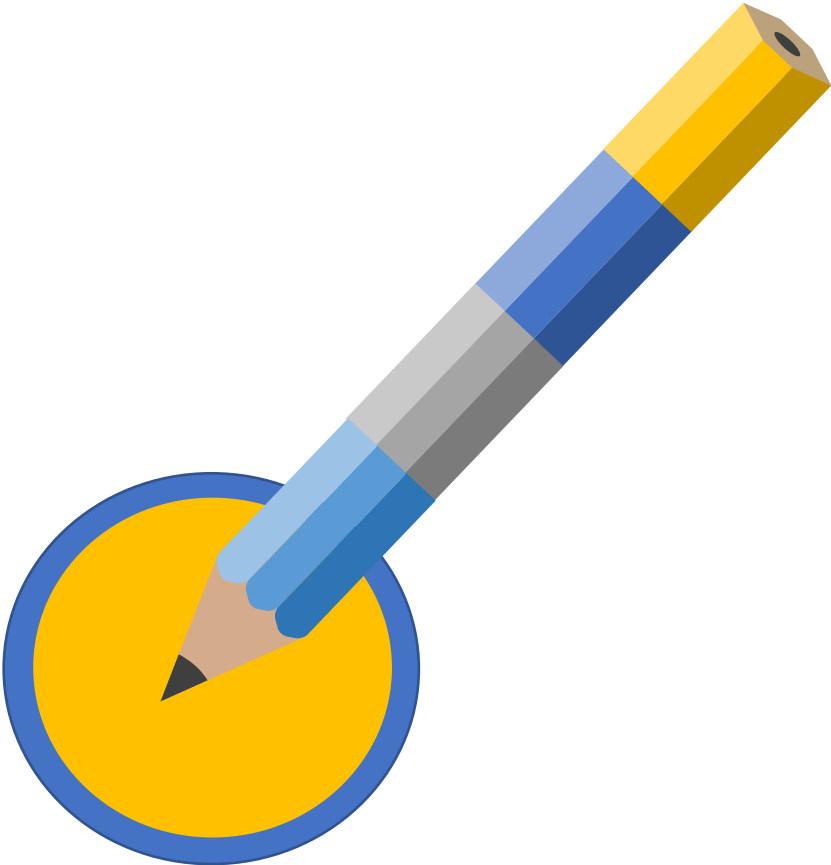
Exercise Workbook

Conversion Tracking Journey .XLSX ☆ 📄 🔄

File Edit View Insert Format Data Tools Help Last edit was 1 hour ago

100% \$ % .0 .00 123 Default (Ca... 11 B I S A 🔍 📊 📈 📉 📊 📈 📉 📊 📈 📉 📊 📈 📉

	A	B	C	D
1	CONVERSION TRACKING JOURNEY MAP			
2				
3	Examples			
4	Annual Conference Registration			
5	Goal of conversion: Event registrations			
6				
7	Example Links:	Shorthand Page Name	Value	
8	https://www.examplesite.org/Events/2019/2019-Tax-Forum	01 Main	25%	
9	https://www.examplesite.org/Events/2019/2019-Tax-Forum#Hotels	02 Hotels	40%	
10	https://www.examplesite.org/Events/2019/2019-Tax-Forum#Schedule	Schedule	50%	
11	https://www.examplesite.org/Events/2019/2019-Tax-Forum#Rates	Rates	70%	
12	https://portal.examplesite.org/eweb/DynamicPage.aspx?WebCode=LoginRequired&expires=yes&Site=NACUBO	Login	75%	
13	https://portal.examplesite.org/eweb/DynamicPage.aspx?WebCode=NACUBOEventLanding&ivd_notes=event	Individual v Group	79%	
14	https://portal.examplesite.org/eweb/DynamicPage.aspx?Action=Add&ObjectKeyFrom=1a83491a-9853-4c8	Reg Info	83%	
15	https://portal.examplesite.org/eweb/DynamicPage.aspx?webcode=COE&ivd_notes=event&Site=NACUBO	Cart	88%	
16	https://portal.examplesite.org/eweb/DynamicPage.aspx?WizardKey=eed9b75-891d-4928-888f-56903e011	Payment	92%	
17	(can't get to without paying)	Confirmation	96%	
18	(can't get to without paying)	Thank You	100%	
19	** Process is the same for all events			
20				
21				



Next Steps

- Fill out Conversion Tracker Workbook by **XXX**

