



How-to-instructions on setting up campaign tracking

Campaigns in SharpSpring allow you to see the end-to-end return on investment (ROI) of your marketing efforts. You can automatically tie your marketing initiatives to revenue goals.

With campaigns, you can track lead conversions from the first interaction all the way through the final sale. This article will detail the different campaign tracking rules available in SharpSpring.

Campaigns Overview

SharpSpring refers to campaigns in a different manner than most users are used to. Many email service providers and marketing automation platforms refer to campaigns as a way to directly reference emails. In SharpSpring, the term refers to the ability to automatically associate leads with a marketing effort, so you can measure the cost per lead and overall ROI of that effort.








When a lead is attributed to a campaign, that person is identified in the system as being a direct result of one of your marketing strategies. When a prospect clicks on an email or fills out a form, SharpSpring uses information on their web and activity history to derive a campaign. You can tie costs to these campaigns, so you can see if you generated enough leads to make the cost of that campaign worth it.

SharpSpring tracks and attributes these campaigns by using any of the following methods:

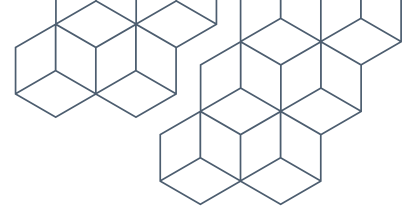
-  Referral URLs
-  Landing pages
-  Urchin Traffic Module (UTM) parameters

Referring URLs

Referring URLs refer to what URL was last visited before accessing the site. To associate leads with campaigns based on a referring URL, do the following:

-  In SharpSpring's top toolbar, click Analytics > Campaigns.
-  Create or edit a campaign.
-  Scroll down to the Tracking section.
-  In the Site drop-down menu, select your website.
-  In the Page, Parameter, or Referring URL field, enter the referring URL for this campaign.
-  Click Add Rule.
-  Click Save Changes.





Landing Pages

Campaign attribution based on a specific landing page visit requires you to put the landing page URL as a rule in your campaign tracking. This type of attribution requires that you already have a tracked website or landing page.

These websites and pages can come from external sources, or they can be through SharpSpring. To track leads that visit your landing page, do the following:

- 📦 In SharpSpring's top toolbar, click Analytics > Campaigns.
- 📦 Create or edit a campaign.
- 📦 Scroll down to the Tracking section.
- 📦 In the Site drop-down menu, select the site to drive traffic to.
- 📦 In the Page, Parameter, or Referring URL field, enter the link information that comes after the backslash (/) in your landing page URL.
- 📦 Click Add Rule.
- 📦 Click Save Changes.

Consider the following example:

- 📦 Your landing page has the address of <https://sharpspring.com/landingpage>.
- 📦 In the Site menu, the site is set to <https://sharpspring.com>.
- 📦 In the Page, Parameter, or Referring URL field, /landingpage is entered as the landing page.

Once saved, when visitors find their way to that landing page, they will be associated with the landing page campaign. The URL for this page would be <https://sharpspring.com/landingpage>, and all leads that visit this landing page will be attributed to this campaign.

Consider the following example:

Another campaign tracking method is using UTM parameters. A UTM parameter is appended to the URL link in order to pass campaign data back into SharpSpring.

Noting the UTM parameter in the campaign builder and appending that to all links will attribute the prospect to the campaign when clicked. That said, when using UTM parameters to attribute to campaigns, make sure you use a campaign's unique identifying UTM parameter in order to avoid conflicts.

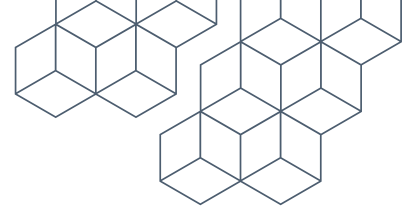
Consider the following example URL:

<https://www.yourwebsite.com/?utm=parameterEX>

In this example URL, www.yourwebsite.com is your own web page address. The UTM parameter is parameterEX.

While utm is the standard value for the parameter, it is not a requirement. You can name this parameter whatever you would like. That said, UTM parameters are case-sensitive.





Examples of UTM parameters include:

utm=PandoraAD1
utm=DecEmail
utm=holidaypromo
utm=twitter

Adding UTM Parameters to Campaigns

To add a UTM parameter to a campaign, do the following:

- 📦 In SharpSpring's top toolbar, click Analytics > Campaigns.
- 📦 Create or edit a campaign.
- 📦 Scroll down to the Tracking section.
- 📦 In the Site drop-down menu, select the site to drive traffic to.
- 📦 In the Page, Parameter, or Referring URL field, insert the UTM parameter without a question mark preceding it.
- 📦 Click Add Rule.
- 📦 Click Save Changes.

With this parameter, tweeting with a link to <https://sharpspring.com/?utm=twitter> link will have SharpSpring identify visitors clicking the UTM parameter as being tied to that specific post. This way, you can post <https://sharpspring.com> on Twitter, Facebook, and LinkedIn, and have separate campaigns for each social media platform.

Note: While multiple strings of UTMs can be placed in a URL, SharpSpring requires there to be only one UTM parameter per each added rule. You can have multiple rules for a campaign, but only one UTM per each rule.

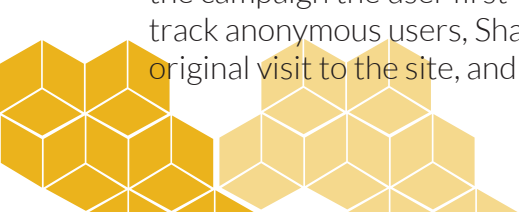
If you have a different UTM parameter (utm=facebook, utm=twitter, utm=linkedin) for three separate campaigns, then you will be able to segment these leads based on what platform they used to click the link to sharpspring.com.

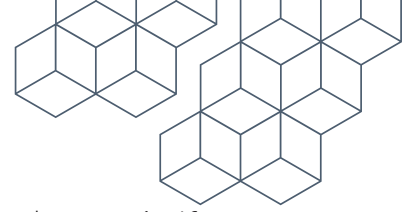
This also works with Google Analytics, as you can also use your UTM parameters from your Analytics campaigns in the SharpSpring campaign builder.

Primary and Manual Campaign Attributions

SharpSpring allows you to choose how to designate a primary campaign to a lead. You can choose either the first campaign a contact participated in, or the most recent. That contact will then have its conversion (as well as any dollar values generated) attributed to that campaign. These methods are chosen on a site-by-site basis.

Using the first campaign option, Always attribute the first campaign the user visits, the original campaign will be attributed to that contact as the Primary Campaign. However, this will not be the campaign the user first visits after becoming tracked. Since SharpSpring uses device IDs to track anonymous users, SharpSpring will go back into that contact's browser history to find the original visit to the site, and use that campaign for attribution.





The last campaign option, Always attribute the last campaign the user visits, will be less static. If a contact returns to your site, their Primary Campaign will be updated to reflect the most recent campaign that brought them there.

To manually attribute contacts to campaigns, do the following:

- 📦 In SharpSpring's top toolbar, click Contacts > Contact Manager.
- 📦 Locate the desired contact.
- 📦 To the right of the contact's name, click Options > Change Campaign.
- 📦 Select the campaign to attribute the contact to.
- 📦 Click Save Changes

When a contact is attributed to multiple campaign tracking rules at once, then the rules will be evaluated in the following order:

- 📦 Google Referrer
- 📦 Google Click Identifier (GCID)
- 📦 UTM Parameters
- 📦 Key-value pair matches
- 📦 Landing page URL matches
- 📦 Other search engine results

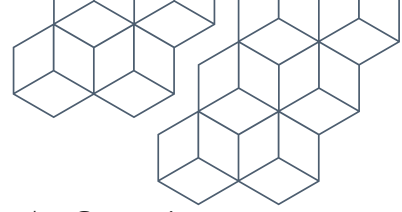
As an example, if a contact were to match with two campaign rules at the same time, with one being a landing page and one being a UTM parameter, then the UTM parameter will be evaluated as the campaign tracking rule due to the order stated above.

Automation-Driven Attribution

If you use automation to apply campaigns to contacts, you can choose to override any tracked campaign with automation-driven attribution. To override tracked campaigns, do the following:

- 📦 In SharpSpring's top toolbar, click Automation > Visual Workflows.
- 📦 Create or edit a visual workflow.
- 📦 Add a trigger to the workflow.
- 📦 In the visual workflow, under an applicable trigger, click + Add > Action.
- 📦 Under Contact Edit Actions, click assign contact to campaign.
- 📦 Enter the desired campaign name.
- 📦 Click the Override existing campaign, if one exists.
- 📦 Click OK.
- 📦 Add other triggers, actions, filters, and delays as necessary to complete the workflow.
- 📦 Set the workflow activity toggle to Active.





The primary campaign associated with the lead will be used to drive reporting. On the Campaign Insights page, you will see a chart of your campaign performance. For leads with multiple attributions, they will only appear in the campaign report for their primary campaign. This is done to keep reporting succinct and to provide you with the most direct information possible.

When a lead converts into an opportunity, SharpSpring will look at the campaign attributions for all contacts associated with that opportunity. The opportunity will take a look at the primary contact on the opportunity and will default to their campaign for attribution purposes. Any Effective Value or Revenue from that opportunity will then be attributed to that campaign on the Campaign Analytics performance chart.

