

. Conversion Tracking Guide

Supplement to: Dynamic Four – Align Your Marketing & Build Your Brand

Purpose

This guide helps you track whether your marketing efforts are actually converting into leads, customers, and revenue. Measuring the right numbers ensures you spend time and money on what works.

Step 1: Define What “Conversion” Means for Your Business

A “conversion” is when someone takes a meaningful action that moves them closer to becoming a customer.

Examples for SMBs:

- Filling out a contact form
- Booking an appointment
- Completing a purchase
- Signing up for a free trial or consultation
- Calling your business directly

□ Write your primary conversion(s) here:

Step 2: Identify Key Conversion Metrics

Track the numbers that actually matter for growth:

1. Website Conversions
 - Contact form submissions
 - Online purchases
 - Newsletter signups
2. Social Media Conversions
 - Clicks from posts to website/landing page
 - Lead magnet downloads
 - Direct messages that turn into sales calls
3. Email Conversions
 - Click-through rates on links
 - Responses to promotions or campaigns
 - Scheduled consultations booked via email

4. Offline Conversions

- Calls mentioning an ad or promotion
- Coupon redemptions
- Walk-ins after a specific campaign

Step 3: Set Up Simple Tracking Tools

You don't need enterprise software—start simple:

- Google Analytics / GA4 → Track website form fills, purchases, and clicks
- UTM Links → Add codes to links so you know which campaign brought traffic
- CRM or Spreadsheet → Record leads, their source, and whether they converted
- POS or Booking System → Tag where new customers came from

Step 4: Calculate Conversion Rates

Formula: $\text{Conversion Rate} = (\text{Conversions} \div \text{Total Visitors or Leads}) \times 100$

Example: 1,000 website visitors → 50 purchases = 5% conversion rate

□ Track your rates here:

- Website: _____%
- Social Media: _____%
- Email: _____%
- Offline: _____%

Step 5: Analyze & Refine

Ask yourself:

- Which channels bring the highest conversion rate?
- Are we spending most of our budget on those channels?
- Which messages or offers generated the most leads?

□ Pro Tip: Don't just track clicks. A Facebook ad that gets 500 likes but zero calls is less valuable than an email that gets 20 opens and 3 booked consultations.

Step 6: Review Monthly

- Track conversions by channel
- Compare results to last month
- Adjust campaigns based on what worked best
- Share results with your team

Quick Action Plan

1. Pick one primary conversion goal this month (e.g., book consultations).
2. Track it with a simple tool (spreadsheet, Google Analytics, or CRM).
3. Review results every 30 days.
4. Double down on what works—adjust or drop what doesn't.

