

LEAD TRACKING

Cheatsheet

What is lead tracking?



Lead tracking is the process of determining the source of leads, actively monitoring where leads are in the sales and marketing funnel, and pursuing the appropriate actions to move the lead to the next stage and close the sale.

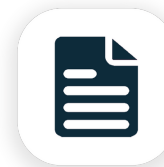
Where can leads come from?



Live chat



Phone calls

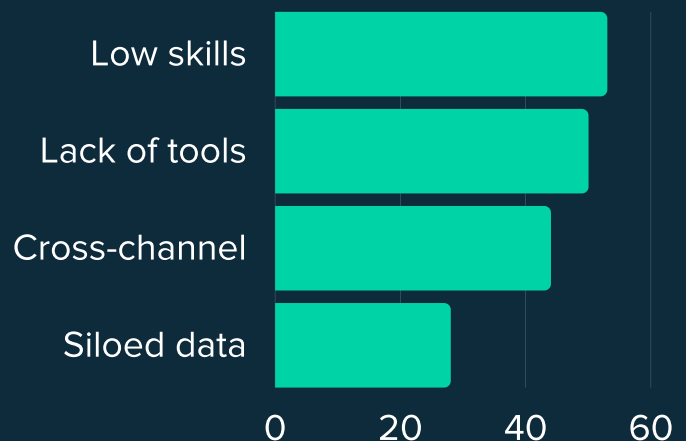


Form fills

Challenges with lead tracking

We asked marketers why they struggled with lead tracking.

From lack of tools to siloed data stuck in CRMs, websites and other apps, it's clear marketers have difficulties tracking leads through the full customer journey.



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How to track leads



Live chat

Live chat tools mostly have built-in reporting functions. But these will only show you so much. With attribution, you can track every chat and link it to a particular user so you can see chat as part of their full customer journey.



Phone calls

Call tracking tools allow you to log and record every inbound call and credit it back to the referring channel source. With an attribution tool, you can then view this call as part of a full customer journey.



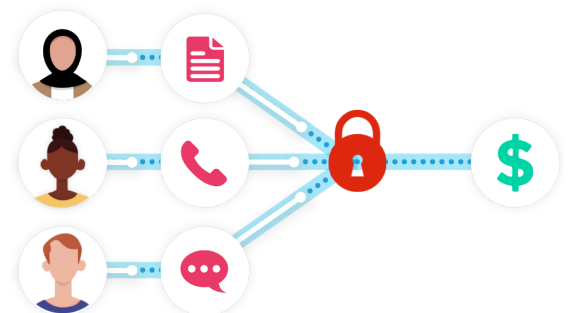
Form fills

You can track form submissions using Google Analytics or Google Tag Manager. By setting up a goal, you can track the count of form fills. With attribution, you can credit these form fills to your marketing and view them as part of a full journey.

Determining lead quality

While you might be able to track individual leads in terms of volume, it's important to remember that a lead doesn't guarantee a sale.

Tracking leads through the full customer journey is essential. With this, you can link your leads to closed sales and determine how much revenue they close into.



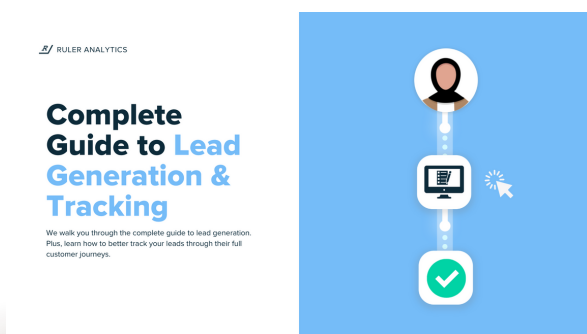
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Further resources

- ✓ [What is Lead Tracking \(+ 11 Tips on How to Get Started\)](#)
- ✓ [Best Lead Management and Tracking Software](#)
- ✓ [How to Track The Value of Your Leads](#)
- ✓ [What is Lead Source and Tips From 30+ Experts](#)
- ✓ [Lead Conversion Metrics You Need to Track](#)
- ✓ [Marketing Leads: 6 Ways to Track Where Leads are Coming from](#)

Take your lead tracking to the next level



[Guide to Lead Tracking & Generation](#)



[Guide to Closed-Loop Attribution](#)