RULER /

Offline Conversions:
A Complete Guide

A marketer's guide
to connecting offline
sales to online leads

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About Ruler Analytics

Ruler Analytics is a visitor level multi-touch marketing attribution product for forms, phone calls & live chat, evidencing every step a visitor makes in their journey and matching revenue back to the source.

By closing the loop between sales revenue and marketing activity, Ruler's platform provides a single point of truth to identify which campaigns drive revenue, allowing organisations to make meaningful decisions to optimise marketing spend.

Ruler's technology has been adopted by marketing professionals around the world, serving a wide range of industries including digital marketing services, financial and professional services, travel and hospitality, education, health and beauty and high-value eCommerce.

Ruler integrates with analytics tools, CRM and other products, to 'close the loop' between leads and revenue, providing insight where you need it most.

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Offline Conversion Tracking
A brief introduction

Online leads result in offline conversions. According to eMarketer, 58% of medium-sized businesses say that improving lead quality is a critical aspect of a lead generation strategy.

Improving lead quality will help you improve ROI on your campaigns. But, how do you improve the quality of your leads, and track conversions happening both online and offline?

Better measurement, including online to offline attribution tracking, helps you understand your leads and where to get more of them.

What are offline conversions?

Sometimes, your digital marketing doesn't lead to an online sale. Instead, it starts a customer down a path that leads to a sale in the offline world. These interactions could include, but are not limited to:

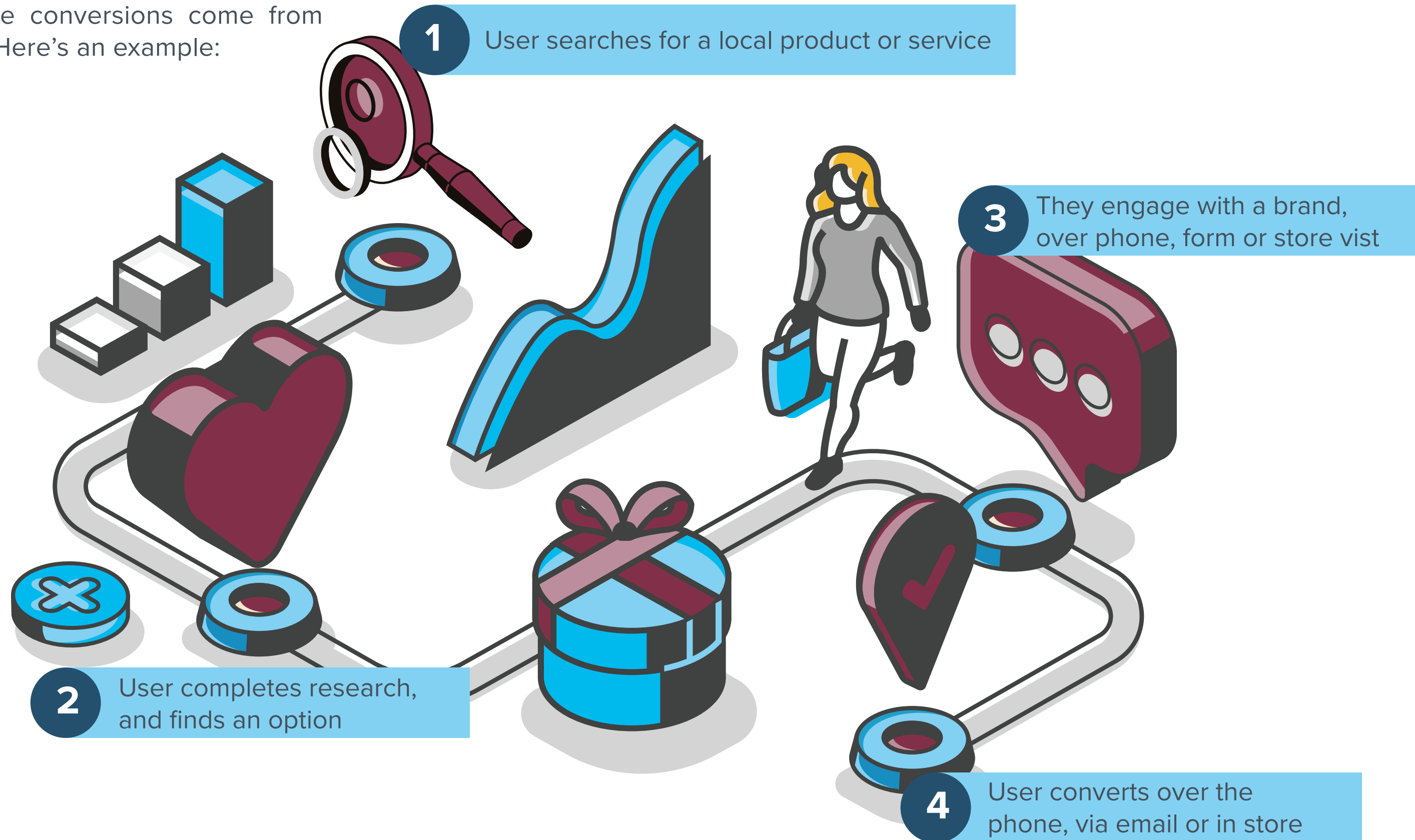|		
PHONE CALL	**FORM SUBMISSION**	**LIVE CHAT**
RADIO/TV ADVERT	**STORE VISIT**	**PRINTED ADVERT**
EVENT/ CONFERENCE	**WEBINAR ATTENDANCE**	**EMAIL CAMPAIGN**

When that happens, how can we track what marketing channel, or advert, sent your customer on that journey? Tracking all of these touchpoints can be tricky, so keep reading to find out how to bring all of these data points together.

The role of Offline Conversions in the buying cycle

Offline conversions can play a crucial role in the buyer's journey. According to Google, 30% of all mobile searches involve local intent to buy.

So how do offline conversions come from online searches? Here's an example:

1 User searches for a local product or service

3 They engage with a brand, over phone, form or store vist

2 User completes research, and finds an option

4 User converts over the phone, via email or in store

Now, we know that this particular customer came from a Google search. But the marketing team of the business may not even have access to offline sales, never mind be able to attribute them.

Why is Offline Conversion tracking so important?

Analysing your marketing efforts is essential to understanding what is, and isn't working. Just like we track conversions online, we should also be tracking offline conversions to:

Get an accurate ROAS
Reduce your Cost Per Lead (CPL) and Cost Per Acquisition (CPA)
Optimise your marketing efforts

By understanding your marketing's impact on your online and offline conversions, and even revenue, you can strategise more effectively.

In the long run, this means more high-quality leads, more sales, and a lower cost per acquisition!

If you rely on a sales team, or your product or service involves a lengthy sales cycle, then you need to implement offline conversion tracking.

Challenges in tracking Offline Conversions

While both offline and online conversion tracking is essential, tracking offline conversions can prove difficult:

Consistency in tracking
While certain channels and tools offer their own offline conversion tracking, what about your other marketing channels? Just tracking offline conversions from Google Ads only gives one small part of the full picture

Real-time data
With most offline conversion tracking, your data isn't real-time. You'll likely have to import data from your CRM or data management system

Revenue data is complicated
While you can upload revenue data to your analytics tools, it's complicated to set up and it can often be difficult to decipher.

How does Offline Conversion Tracking Work?

So, now we know more about it, how does it work in practice?

Well, it depends channel to channel. Currently, you can track offline conversions directly through Facebook, Google and Bing.

All three use tracking data to allow you to connect offline sales to online sessions.

Here's a brief overview of how it works

1. A user clicks on your ad and is sent to your website

2. The tool you created the ad with, will track the user until they convert into a lead

3. Later, when you record a sale in your CRM or data point, the tool will associate that email address or contact information to the lead created via the ad

This means you can see exactly what offline conversions your ads are resulting in. Whether that's a phone call, or even a store visit!

Tracking your Offline Conversions
Tracking Offline Conversions through Facebook

Sometimes, a user clicks on a Facebook ad and goes directly on to make a purchase on your website. But other times, viewing an ad is just the starting point of a lengthy buying journey.
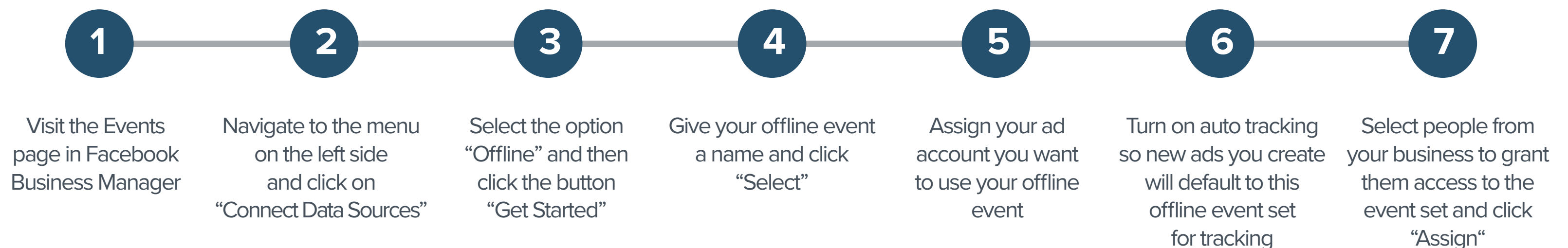
Facebook Offline Conversions measure offline sales by matching data from your CRM, marketing automation tool, call centre software, or point of sale system to your Facebook advertising campaigns.

It looks at identifying information from your sales systems, such as an email address, and uses this to compare data of those who purchased to those who viewed your Facebook ads. If there's a match, it attributes the sale to the specific ad and campaign viewed.

Setting up Facebook Offline Conversions Tracking

Before you can use Facebook's Offline Campaigns feature, you must have a Facebook Ads account, and the user who sets it up must be a Facebook Business Manager.

Once your ad account is set up, you can create an offline event to track your offline conversions:

1	2	3	4	5	6	7
Visit the Events page in Facebook Business Manager	Navigate to the menu on the left side and click on "Connect Data Sources"	Select the option "Offline" and then click the button "Get Started"	Give your offline event a name and click "Select"	Assign your ad account you want to use your offline event	Turn on auto tracking so new ads you create will default to this offline event set for tracking	Select people from your business to grant them access to the event set and click "Assign"

Next, you need to add your offline sales data into the system in order to match sales with Facebook ad campaigns.

There are a few different ways to do this:
1. Add offline sales data manually by uploading a CSV file to Facebook Business Manager.
2. Use a pre-built integration to have data from your POS, CRM, or loyalty program automatically uploaded to Facebook. Find integrations and setup instructions here.
3. Have your development team hook your sales system to Facebook using the Facebook Offline Conversions API to automatically upload sales data to Facebook.

If you choose option one, just keep in mind that you'll need to manually upload data to Facebook regularly in order to connect offline conversions back to Facebook Ads Manager.

Tracking your Offline Conversions
Tracking Offline Conversions through Google Ads

Offline conversion tracking in Google Ads is a powerful solution that allows you to import conversions from other tools (such as your CRM) so that you can see which campaigns are most effective at driving offline sales. You can also track conversions offline with Microsoft Ads, but we'll stick with Google Ads due to its popularity.

There are two different types of conversions in Google Ads:

Conversions from an ad click

When a visitor clicks on one of your ads, Google will generate a unique Google Click ID (GCLID).

Once a visitor completes a form on your website, their form details (name, email address or phone number) are passed onto your CRM, or spreadsheet, along with their GCLID.

When your sales team closes a deal offline, you can upload that data to Google Ads via a spreadsheet or file transfer so that you can match offline conversions with the campaigns that generated them.

Remember, for this to work you'll need to have enabled autotagging on your Google Ads campaigns
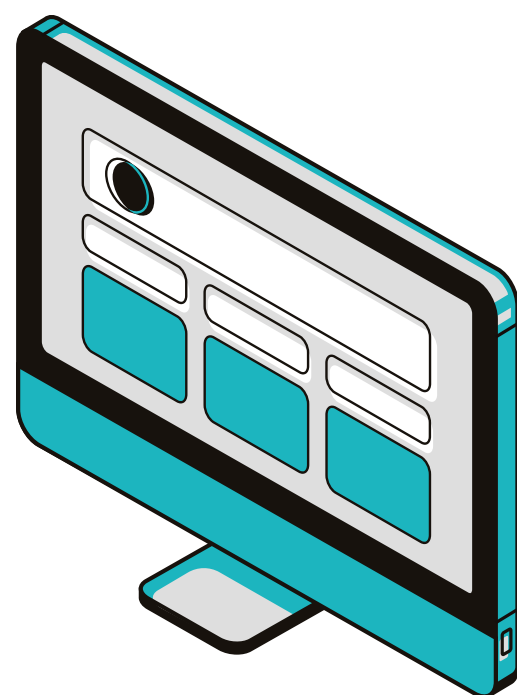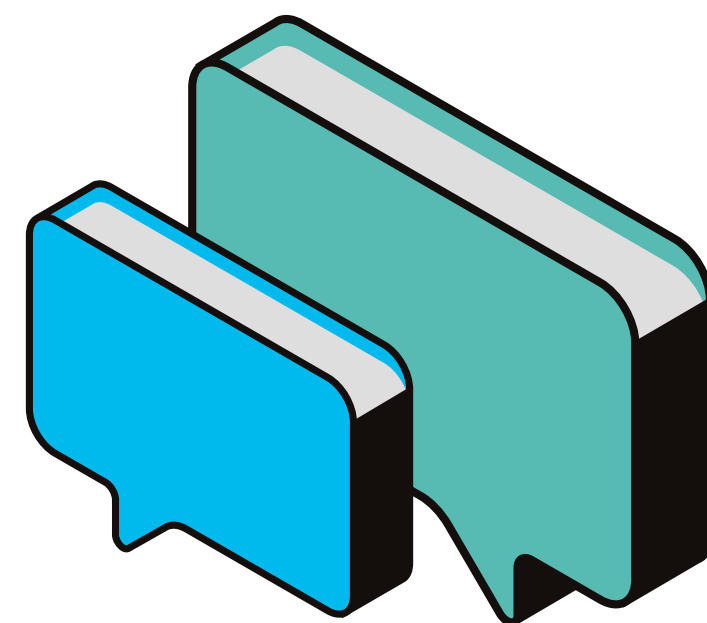
Conversions from calls

Calls can be measured after a user clicks on a mobile call extension or dials a number from a desktop ad.

For conversions that start with a phone call, you will need a Google forwarding number so that you can import your call conversions in Google ads.

Instead of tracking the GCLID, you'll keep track of the caller's number and the time of call.
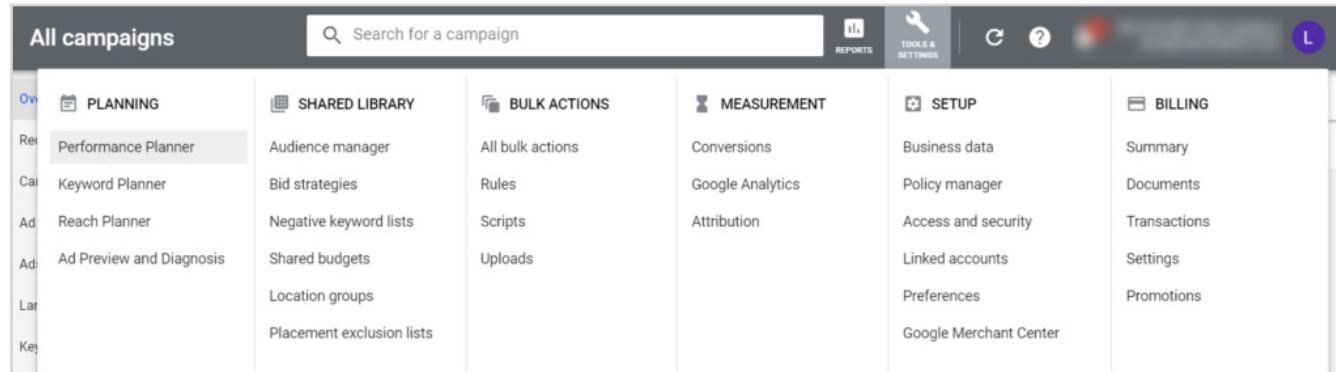
When a call results in a conversion, the data is uploaded to Google Ads, allowing you to connect your call conversion with your campaigns and keywords.
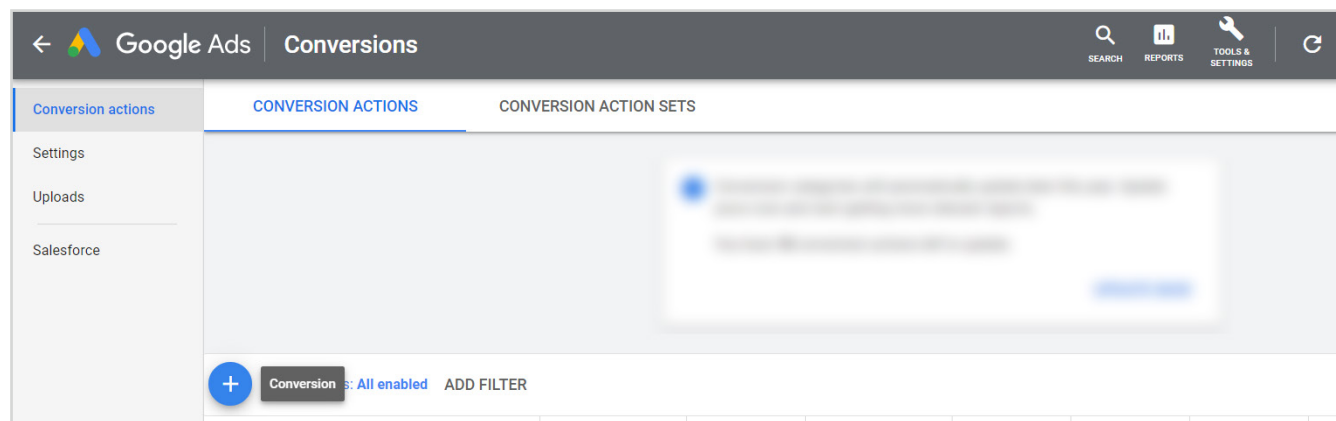
Tracking your Offline Conversions
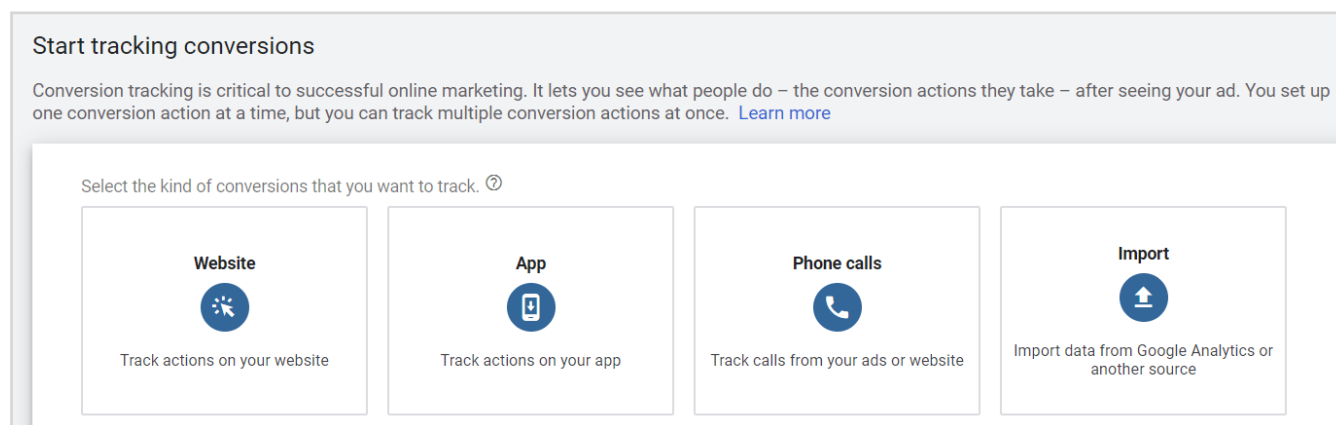## Setting up Google Offline Conversions Tracking

Get started by clicking, Tools and Analysis tab in Google Ads and then select Conversions from the drop-down menu.

You'll be taken to the All conversions page. Click on the conversions tab and then click the +conversion button to create your first conversion.


Click 'website'.

Next to the 'Conversion name', enter a name for the conversion you want to track. This name will be used to identify conversions in reports.

Next to category, select a description. The category is a setting that will allow you to segment your conversions in reports.

Next to value, select how to track the value of each conversion. You can add an amount that reflects the value of the action. Or, you can use real costs to track prices. You'll need to customise your tag to track transaction-specific values.

Next to count, select how to count your conversions. 'One' is best for leads, when only one conversion per ad click adds value for your business, e.g. a sign-up form. 'Every' is best for sales, where every conversion adds value.
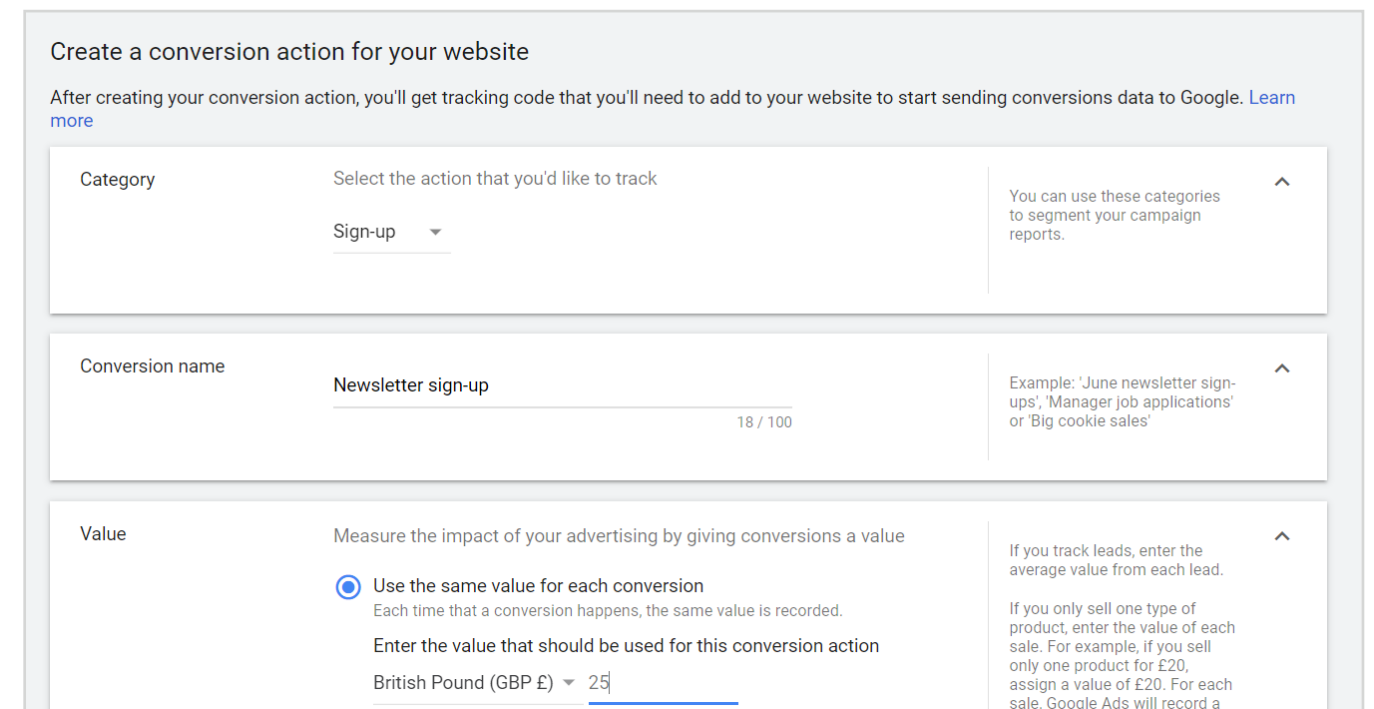
Within click conversion window you can choose how long you want to track conversions for, up to 90 days. Then click view-through conversion window, up to 30 days.

Click to include in 'conversions'. This setting (which is defaulted), lets you decide if you want to include data in your reporting column. Click create and continue. The screen will show you've created your conversion action.

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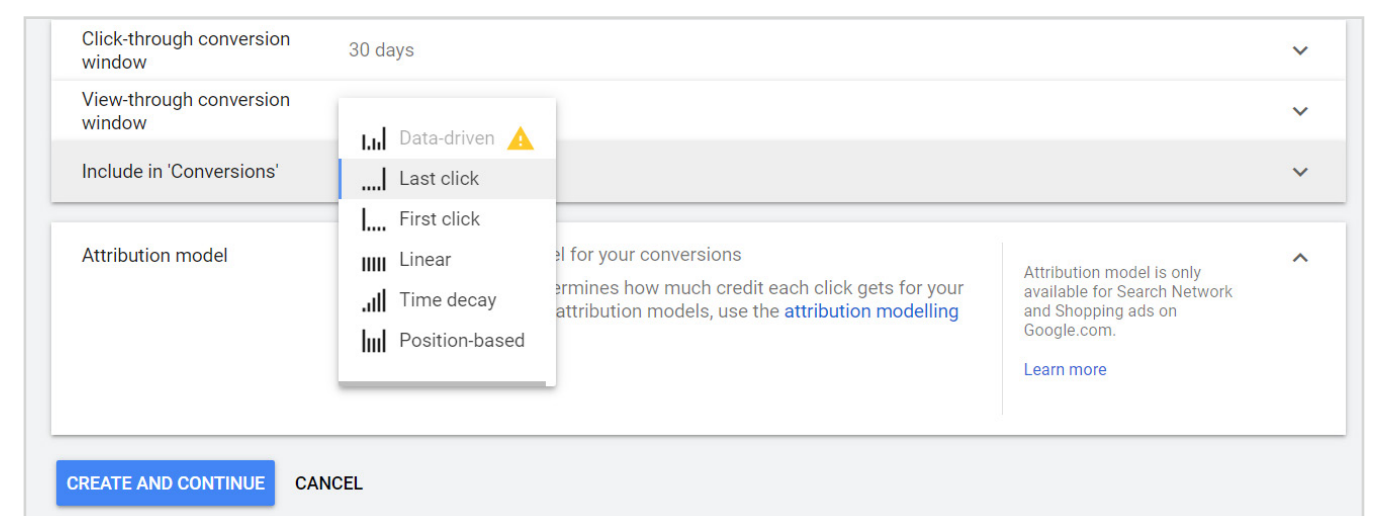
Tracking your Offline Conversions
Setting up Google Offline Conversions Tracking

Set up your conversion tracking tag

Part one - Add code to your website

To set up website conversion tracking for the first time, you'll need to add two code snippets to your website: the global site tag and the event snippet.

There are two ways to install your tags:
Option 1:   Install the tag yourself
Option 2:   Use Google Tag Manager

Part two - Import your conversions from a file

1.   Use the acceptable "format" (Excel, CSV or Google sheet). You can access templates created by Google within Google Ads.

Use the template you downloaded to create your own. When you are done, it is time to import the file.

2. Click on the "tools" icon, "measurement" and then "conversions". Then select "uploads".

3. Click on the "plus" sign to begin the upload.

You can upload a Google sheet document, Excel file or connect to an HTTPS or STFP hosted file.

Attributing revenue to your Google Ads

Incorporating revenue generation into your reporting in Google Ads can be tricky to implement.

You may need web developer and/or CRM administrator support to:

- Add hidden fields to every form on your website to ensure that it captures the GCLID
- Add fields to your sales CRM to match your revenue generated to the GCLID
- Integrate your data sync in and out of your CRM, or set up manual intervention to download and import csv data

Creating a seamless approach to reporting on offline conversions in Google Ads isn't easy.

While impressions and clicks are important to understanding the performance of your adverts, mapping your campaigns against revenue is much more effective.

We'll come onto how you can see all of your revenue mapped against your marketing channels, campaigns and keywords in a later chapter.

Limitations of Offline Conversion Tracking

Offline conversion tracking through Google and Facebook is important to track the impact your ads are having. However, there are limitations to the insight they provide:

Conversion tracking is exclusive to their platform

Conversion tracking in Google Ads is limited to PPC traffic, just how Facebook only reports on its own offline conversion success.

So, if a call is generated by a different source, such as SEO or organic social media, you'd be unable to determine whether or not your campaign played a part in that offline conversion.

Why does this matter? Most businesses use paid advertising as part of a broader marketing mix. If your Google Ads or social advertising play a significant role at the top of the funnel, then it's likely that your advertisement efforts are going unattributed.

Can't determine call quality

A call conversion in Google Ads is triggered based on minimum call duration. Meaning, Google Ads doesn't provide you with an option to determine the quality of your phone enquiries.

Facebook meanwhile, counts clicks-to call. This means you're tracking the amount of times the dialpad with your number was opened. How many actual calls the ad generated can't be tracked via Facebook.

Why does this matter? Just supplying raw numbers and calling it a success is not good enough. Keywords, ads and campaigns all produce different revenue per lead and lifetime values. Without this insight, it's impossible to accurately calculate the ROI of your paid activities and optimise your campaigns accordingly.

Your offline calls aren't 'sales'

When someone calls your business, it's automatically classed as a lead. Generating leads is well and good, but it doesn't mean much if they're not converting into revenue.

Why does this matter? Most leaders want top-level figures on how their business is performing and if their investments are getting a good return. If you want more budget to scale your marketing, then you're going to need to report on more than just the number of leads.
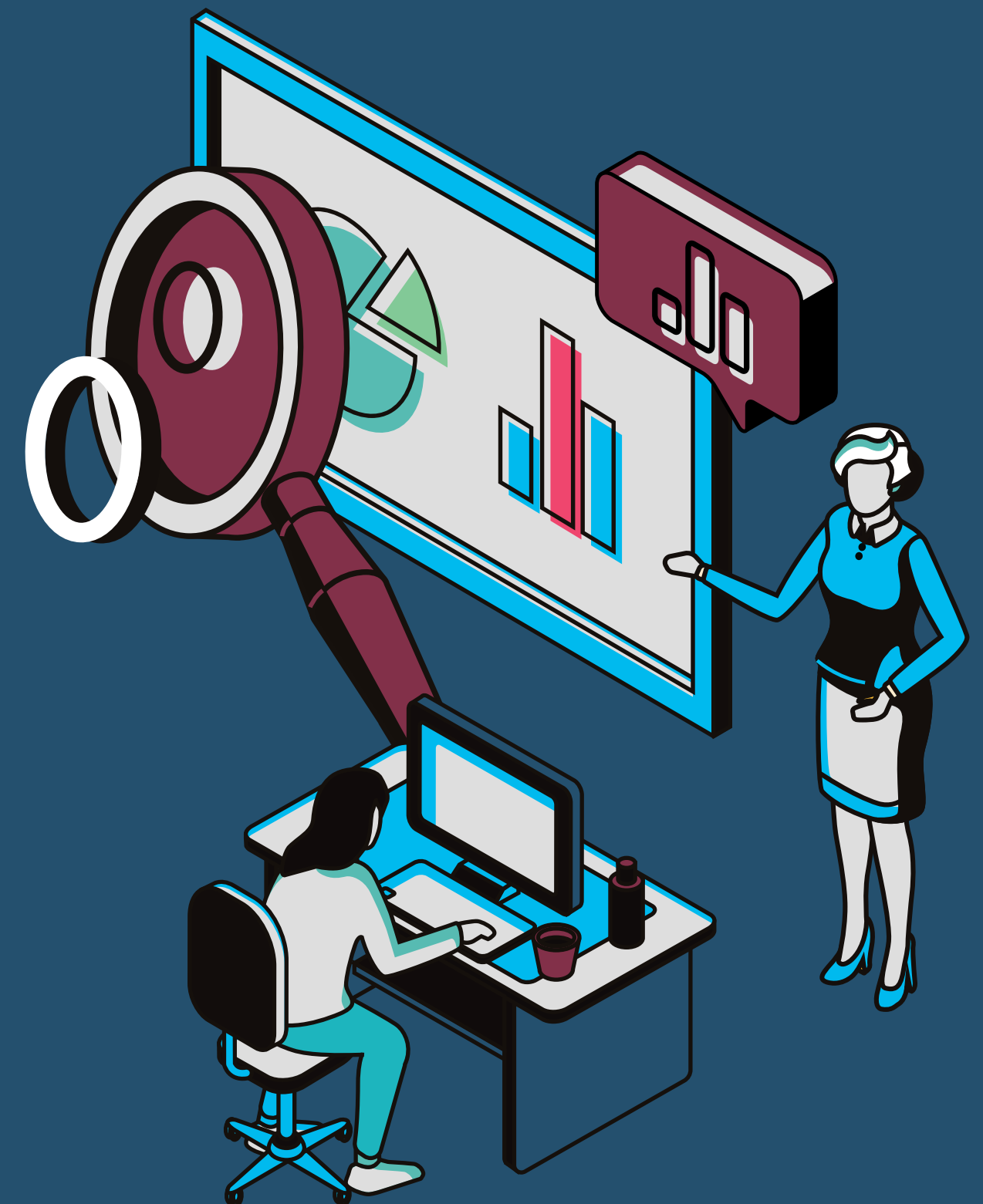
How Ruler Analytics can help connect online leads to offline sales

Imagine if you could view your marketing's impact on your sales across channels, campaigns and even keywords.
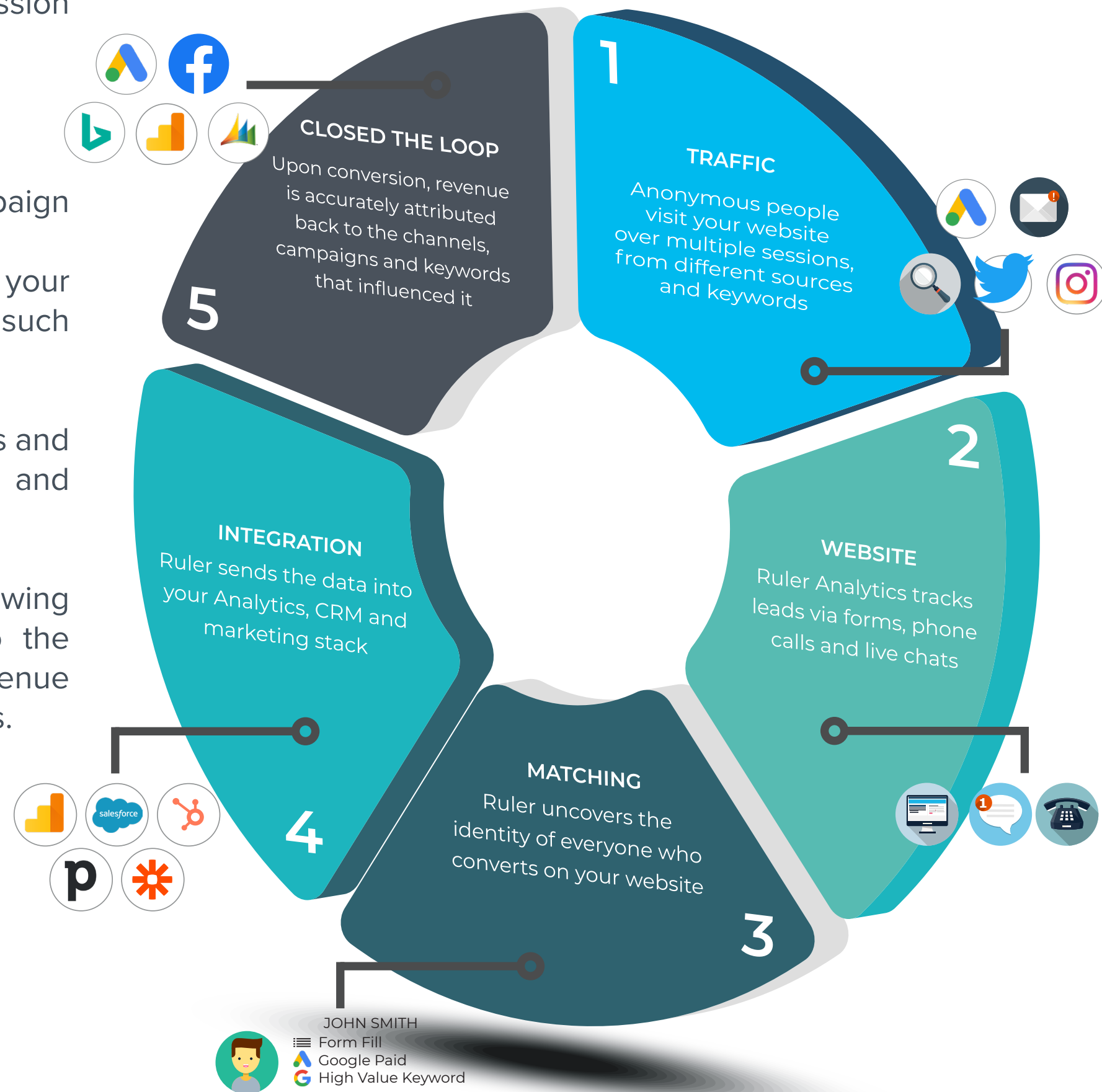
Well, that's exactly what Ruler Analytics does.

We track every touchpoint, from phone call tracking, to form submission and live chat to ensure that every point is measured.

✔ Monitor calls, forms and live chat
✔ Track users throughout their customer journey
✔ Attribute revenue directly to the influencing marketing campaign

Ruler's marketing attribution solution seamlessly connects your visitor, lead and sales data to campaigns in your reporting tools such as Google Ads, Facebook or Microsoft.

Once you successfully close the loop between your offline sales and marketing activity, you can determine which campaigns, ads and keywords are driving the most value.

Inside of Ruler, marketing teams can build detailed reports showing exactly what campaigns prospects interacted with prior to the conversion and — even more exciting — exactly how much revenue each individual marketing campaign generated for the business.

CLOSED THE LOOP
Upon conversion, revenue is accurately attributed back to the channels, campaigns and keywords that influenced it

5

1

TRAFFIC
Anonymous people visit your website over multiple sessions, from different sources and keywords

WEBSITE
Ruler Analytics tracks leads via forms, phone calls and live chats

2

INTEGRATION
Ruler sends the data into your Analytics, CRM and marketing stack

4

MATCHING
Ruler uncovers the identity of everyone who converts on your website

3

JOHN SMITH
Form Fill
Google Paid
High Value Keyword

Ruler's role in the buyer's journey

You want to track your customer at every stage of their journey, right?

Here's how Ruler can help you at each and every step:

DISCOVERY	RESEARCH	ENGAGEMENT	LEAD	OPPORTUNITY	CUSTOMER
User clicks an ad and lands on website	User browses site and learns about product/services	User enquires via form fill, live chat or phone call	User converts to a lead and details passed to CRM	Deal works through sales pipeline	Deal converts as a customer in CRM
Ruler captures GCLID via Javascript	Ruler tracks user activity over multiple sessions	Ruler matches marketing data to the lead	Ruler enriches CRM entry with marketing variables	Ruler pulls opportunity data including stage and forecasted value	Ruler pulls revenue value from CRM
		Ruler pushes lead data to marketing reporting tools		Ruler pushes opportunity data to marketing reporting tools	Ruler pushes revenue data to marketing reporting tools

Why Ruler is the ultimate solution for tracking offline conversions

We know by this point, offline conversion tracking is essential. You can reduce your cost per lead, increase your return on ad spend, and even generate more conversions.

But why is Ruler a better solution for tracking offline conversions?

Well, we put it down to these 3 reasons:

We monitor all your channels

We don't just monitor Google Ads, or Facebook Ads Manager. We track every single user from every single channel.

You can see how your channels are working independently, and holistically, to move users down the marketing funnel.

We're easy to set up

Remember we said how Google Ads offline tracking requires web development and lots of back-end admin time to set up?

Ruler Analytics is simple to set up and starts tracking straight away. This means more time for you to spend on what truly matters; understanding your reports and optimising your efforts.

We track and record every touch point

We're not just talking about tracking and recording calls, live chat and form submissions (though we do that too). We're talking tracking every single user's anonymous sessions, from their first session to when they become a lead.

In fact, we never stop tracking them! This means you can see every individual marketing journey your customers take and use that knowledge to develop your marketing strategy.
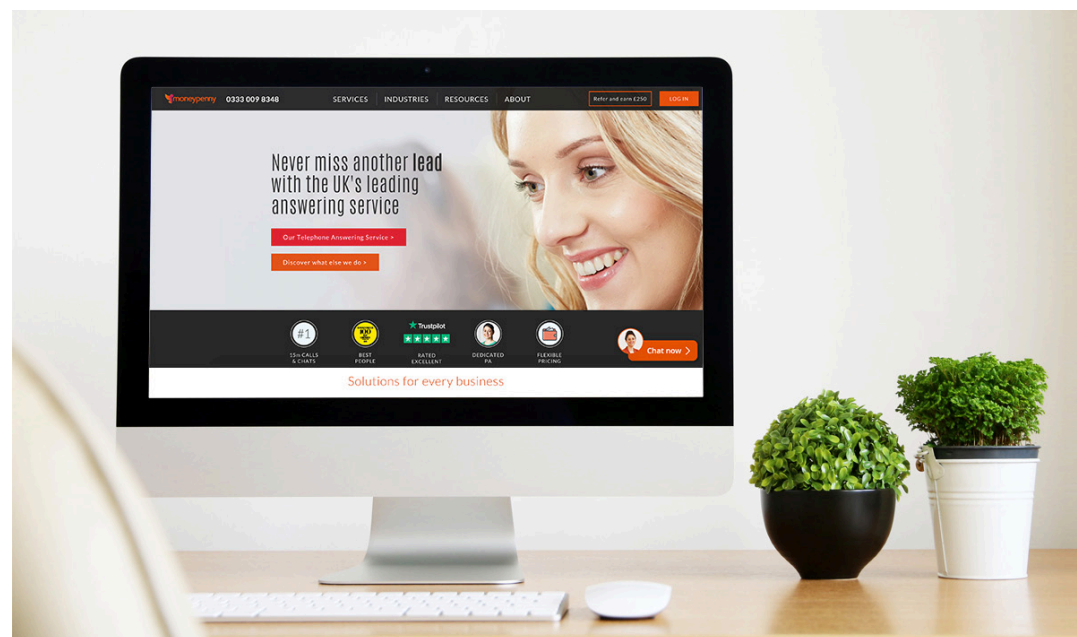
REVENUE

LEADS

Case Study

Moneypenny increase visibility of Google Ad performance and reduce cost per lead by 11%

20%
Increase in leads attributed to phone calls in Google Ads

11%
Reduction in cost per lead

moneypenny

Founded in 2000, the company delivers Telephone Answering, Live Chat, Outsourced Switchboard and multichannel customer services for hundreds of thousands of clients across the UK and USA, handling some or all of their inbound marketing activity and customer enquiries.

> Overall, Ruler Analytics has given us much greater visibility on where our leads are coming from, particularly when it comes to phone calls.
>
> Moreover, the insight that it has provided has allowed us to be much more intelligent with the way we optimise our paid media campaigns, meaning we can drive down CPLs whilst improving lead volumes.
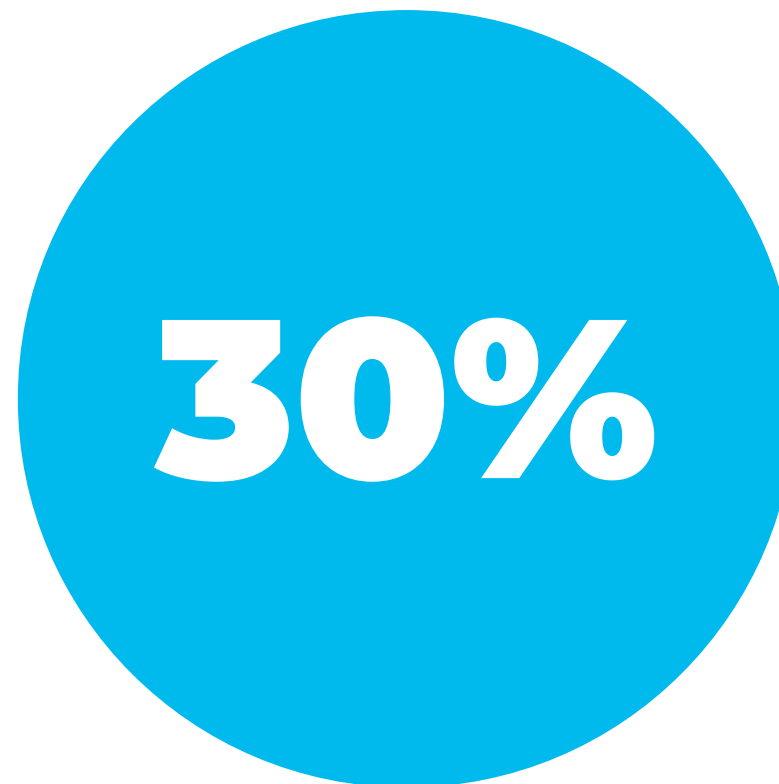>
> I'd thoroughly recommend any lead generation business utilise the Ruler Analytics platform

Daniel Marshall, Digital Marketing Manager, Moneypenny

Case Study

Optionis Group increase MQLs by 10% by optimising towards offline conversions via Ruler Analytics

30%

Increase in call volumes

10%

Increase in Marketing Qualified Leads (MQL)

optionis

A market leader in the financial services industry, Optionis Group provides accountancy, tax and umbrella employment solutions to contractors and small businesses across multiple brands such as SJD Accountancy, Nixon Williams, Clearsky Accounting, Brian Alfred and Parasol.

"Ruler's conversion tracking allows us to monitor if campaigns are driving sufficient call volumes and help better understand which sources have the strongest conversion metrics for both conversion to lead, and conversion to sale.

The data highlighted inefficient spend in a campaign, resulting in our cost per lead coming in over budget. With access to this data we were quickly able to realign messaging and improve conversion rates across all channels."

Chris Shepherd, Senior Digital Marketing Manager, Optionis

How Can Ruler Analytics help you?

Marketers can align sales revenue with marketing activity through Ruler's Marketing Attribution Closed Loop Framework.

Ruler tracks website visitors over multiple touch points and connects the dots once a visitor converts to a lead via form completion, call or live chat conversation.

By integrating this data with your CRM or sales records, Ruler closes the loop between lead and the sale, providing definitive proof of the impact your campaigns have on business growth.

Whether you report via Google Data Studio, Analytics or Facebook Advertising, Ruler's flexible integration options can push data to where you need it most, helping you analyse data cross-channel to get a true understanding of your most valuable customers and optimise campaigns to drive even more return.

Want to find out more?

Book a demo with Ruler's attribution experts today at
www.ruleranalytics.com

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