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Tracking UTM values into Salesforce Campaigns

Intermediate | Admin

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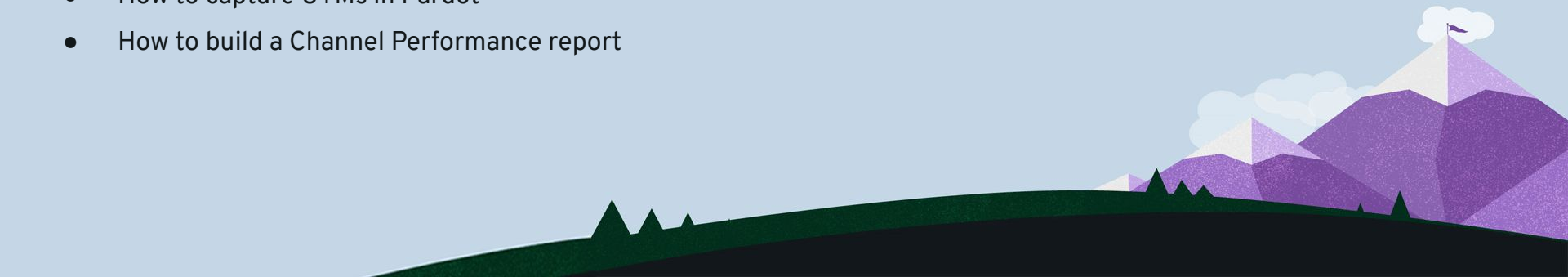
MODERN

Tracking UTM values into Salesforce Campaigns

What to expect in this session:

- Understanding UTMs
- The value of tracking UTMs in Salesforce Campaigns
- How to get UTMs into Salesforce
- How to capture UTMs in Pardot
- How to build a Channel Performance report



Why is this important?

What can you see now in Pardot?

- Pardot “Source” field
- Google Analytics UTM data

Why isn’t this good enough?

- Both capture first-touch
- Rely on Pardot/Google Analytics to populate
- Doesn’t appear on Campaign Member records

What will you see by adding custom UTMs?

- Consistent capturing of UTM data for last touch and/or first touch
- Detail of where Prospects came from
- Customizable to your business needs
- Track UTMs through to specific campaigns

Understanding UTMs

What are UTMs?

UTMs (Urchin Tracking Module) are parameters in a URL that identify the campaign that is referring traffic to a specific website, and attributes the browser's website session and the sessions after that until the campaign attribution window expires.

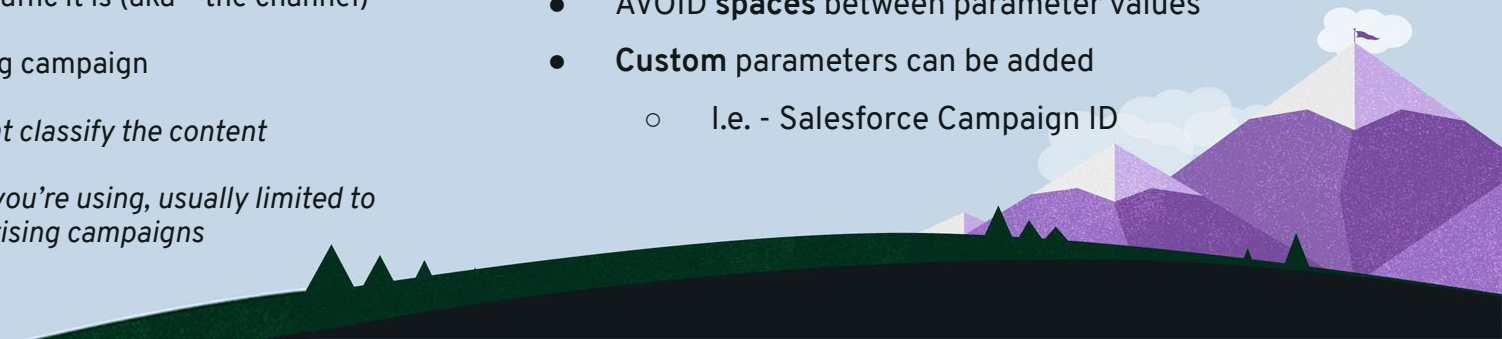
https://go.pardot.com/demo-landing-page/?utm_source=google&utm_medium=ppc&utm_campaign=campaign_name&utm_content=ad1&utm_term=utm_tracking

UTM Parameters

- **Source**
  - The website the traffic has come from
- **Medium**
  - The type of traffic it is (aka – the channel)
- **Campaign**
  - The marketing campaign
- *Content*
  - *How you might classify the content*
- *Keyword/Term*
  - *The keyword you're using, usually limited to Search advertising campaigns*

UTM Best Practice tips

- These are **unique** to each company
- ALWAYS use **lowercase**
- AVOID **spaces** between parameter values
- **Custom** parameters can be added
  - I.e. - Salesforce Campaign ID



Audience participation time!

Don’t panic

Please go to the following link and submit the form:

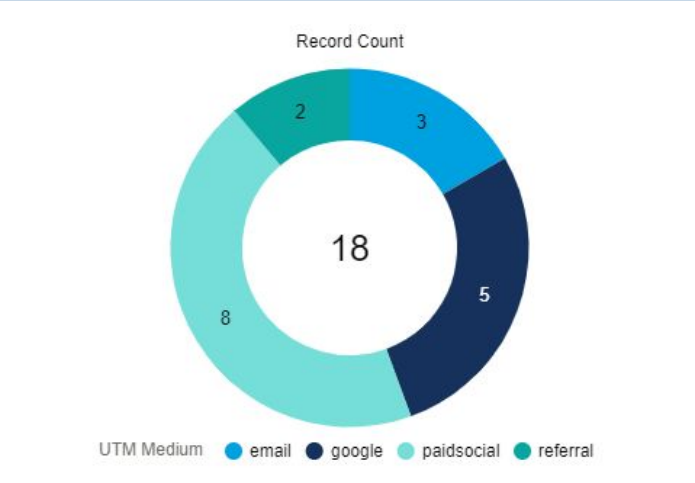
- First name starts with **A-H**:
  - bit.ly/pardreamin-utm1
- First name starts with **I-P**:
  - bit.ly/pardreamin-utm2
- First name starts with **Q-Z**:
  - bit.ly/pardreamin-utm3

The value of tracking UTMs in Salesforce Campaigns

Salesforce Campaigns by Channel

ers

What this means for your reporting



- Create reports in Salesforce and see how your Campaign Members were acquired
- Can leverage this information in B2B Marketing Analytics

Talk to your Salesforce and Web admins

Getting buy-in early on will help!

Do they have capacity to support you?

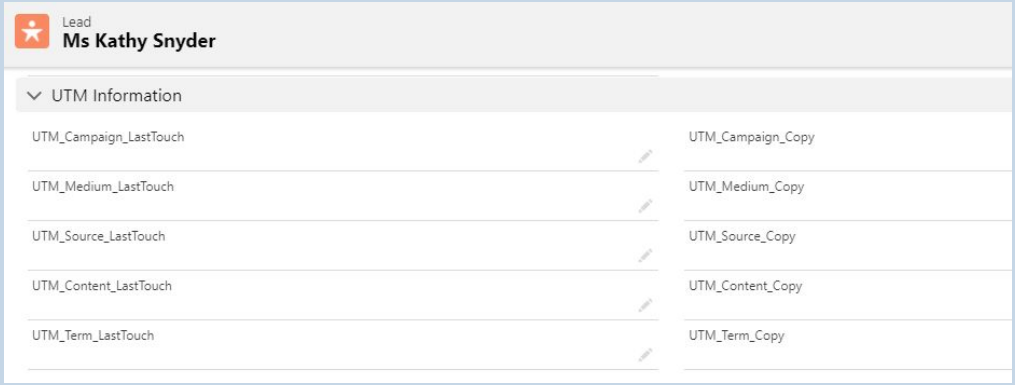
Are there current configurations that could be impacted by this?

Are there platforms limitations that require a different approach?

They will give you realistic timelines, making it a smooth solution to implement :)

UTM fields in Salesforce

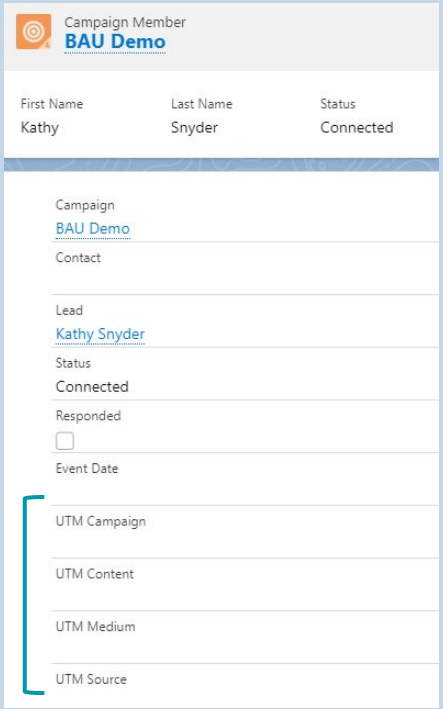
UTM Fields on Leads and Contacts



Normally these are hidden

- You will need two sets of fields: visible and hidden
- Some considerations:
  - Do you also want to see First Touch? You'll need another set of UTM fields

UTM Fields on Campaign Members



- Only one set of fields required
- No need to distinguish between "first touch" or "last touch"

UTM fields in Pardot

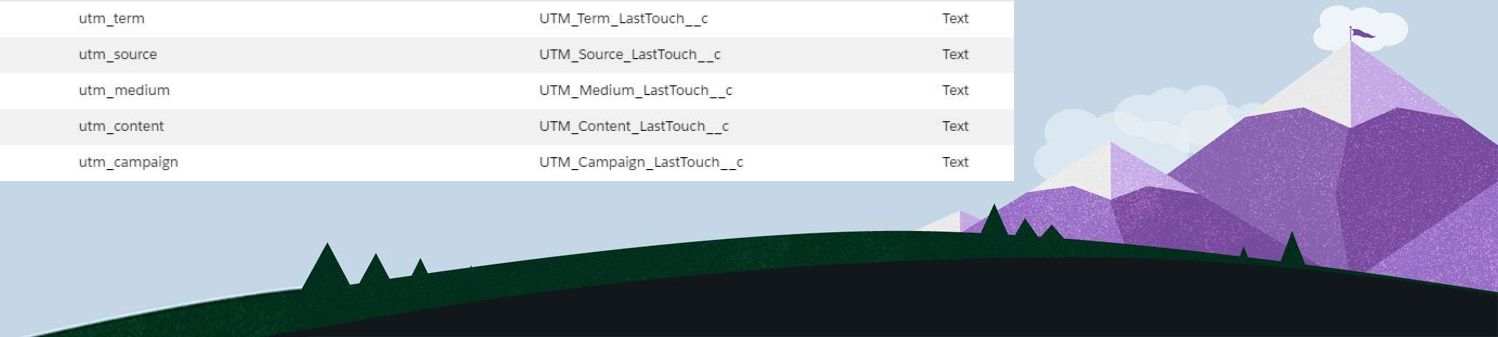
UTM Fields on Prospects

- Create custom UTM fields in Pardot on the prospect record
  - **TOP TIP:** Field label (aka API label) is in lowercase and uses an underscore

Custom Fields

Filter:

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
utm_term	utm_term	UTM_Term_LastTouch__c	Text
utm_source	utm_source	UTM_Source_LastTouch__c	Text
utm_medium	utm_medium	UTM_Medium_LastTouch__c	Text
utm_content	utm_content	UTM_Content_LastTouch__c	Text
utm_campaign	utm_campaign	UTM_Campaign_LastTouch__c	Text



Passing UTMs into Pardot

Heads up: Talk to your website admin before you start implementing this solution

Form on website

- Need to add Javascript to the form to help pass the values into Pardot due to iframe
- *Usually need to add Javascript to your website too*
- UTM fields added as “hidden” fields on form

Form handler

- Need to add Javascript to your landing page/website to help pass the values into Pardot
- UTM fields added as “hidden” fields on form

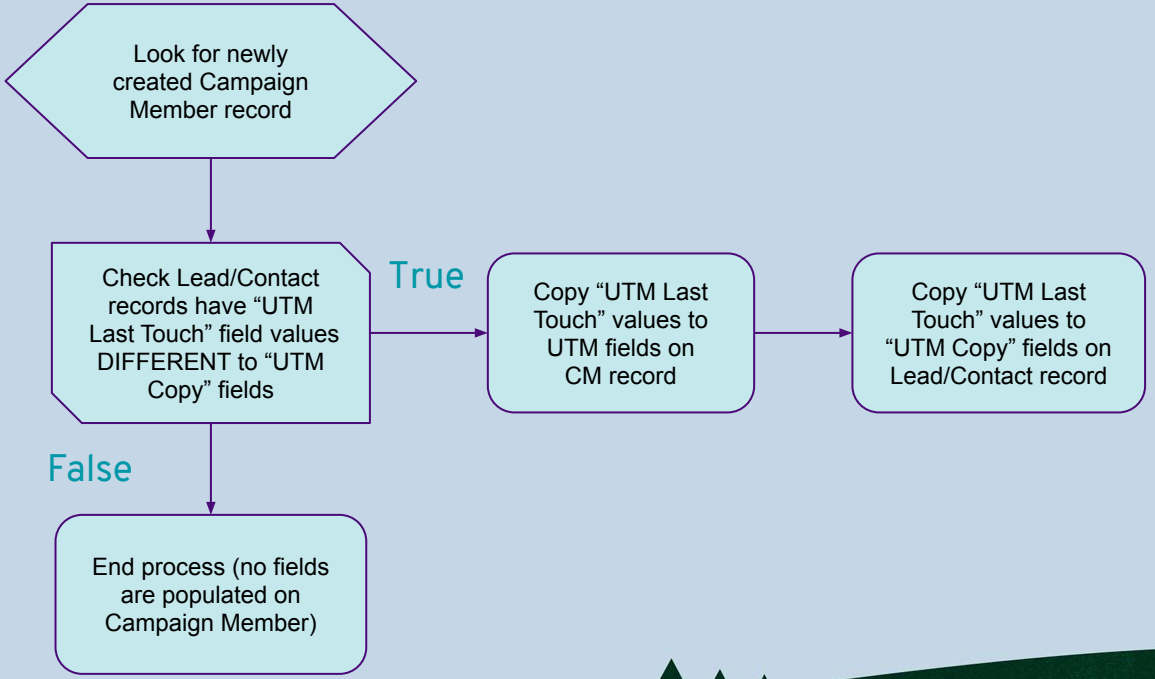
Form on Pardot LP

- No Javascript needed
- UTM fields added as “hidden” fields on form

Code source: Jenna Molby
https://jennamolby.com/the-ultimate-guide-to-capturing-utm-parameters-in-pardot/

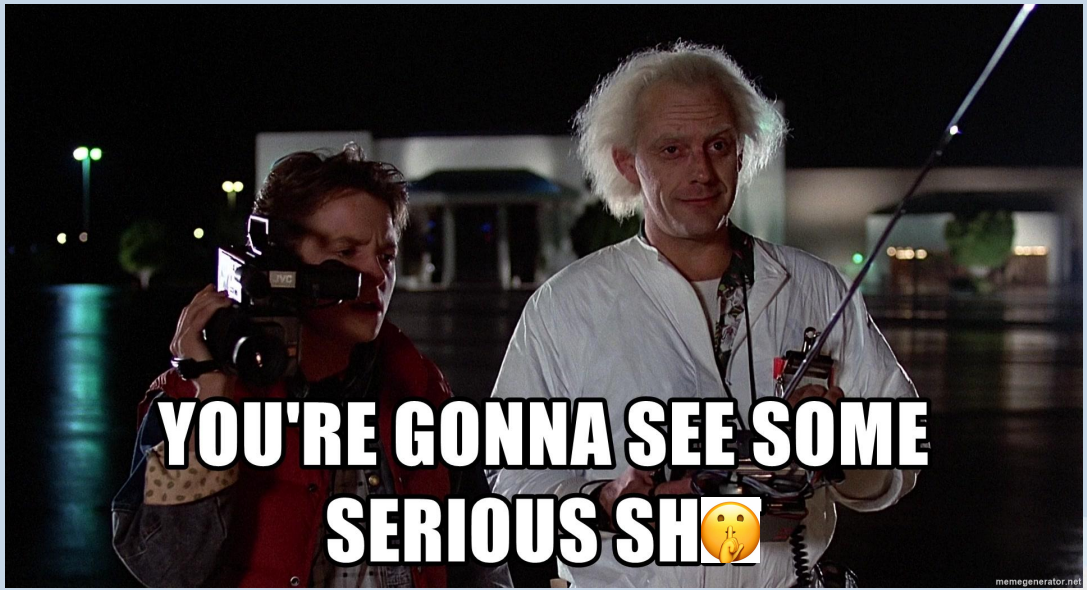
Automating the data flow

“Stamping” UTM values



- Advise using a Flow as Process Builders are going to be retired at some point
- Only 5 Active Flows allowed with Pro version of Salesforce

Let's see it all in action!



Test and test again!

- Are the UTM values being captured correctly in Pardot?
- Are they passing through to lead and contact records?
- Are they being applied to the Campaign Member record?
- What if a single user does multiple engagements?
- Are the UTMs also reflected correctly in Google Analytics?

Thanks for listening!

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