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**MParDreamin' 2022**

# Grab And Hold Those UTM's: Advanced Touchpoint Attribution Techniques



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# Who is this For?

Using “Marketing Cloud Account Engagement powered by Pardot” - Any Edition

Using third party traffic generation to your website:

Banner Ads | PPC | Remarketing | 3rd Party Ads

Using Pardot/MCAE Forms (Examples Given)

Using Pardot/MCAE Landing Pages (Optional)

Using Leads and Opportunities

Looking for a ***Simple Solution for Basic Attribution***



# Where'd the Money Go?

utm\_source=google

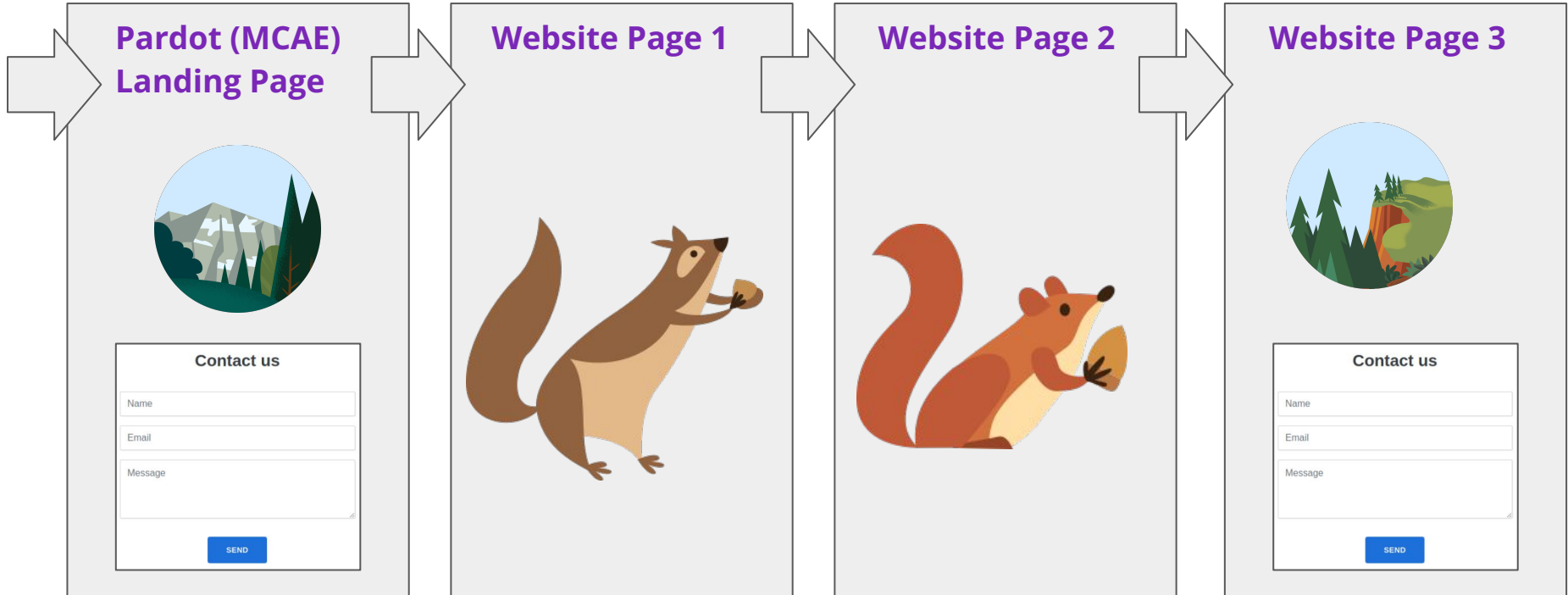
utm\_medium=ppc

utm\_campaign=basically-anything

utm\_content=what-did-they-see

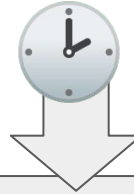
# The Basic Problem

UTMs are only good on the first page...



# The Basic Problem

UTMs are only good on the same visit...



**Pardot (MCAE)  
Landing Page**



**Contact us**

Name	<input type="text"/>
Email	<input type="text"/>
Message	<input type="text"/>
<input type="button" value="SEND"/>	

**Website Page 1**



**Website Page 2**



**Website Page 3**



**Contact us**

Name	<input type="text"/>
Email	<input type="text"/>
Message	<input type="text"/>
<input type="button" value="SEND"/>	

**We need to ignore the default utm capture capability completely and rebuild it with first party cookie capture**



# Required Elements



## Cookies

**UTMSimple.com**

**JS first party cookie.  
Deployable via tag  
manager**

**JS on All site pages  
plus on forms**

## Custom Fields

first\_utm\_source  
utm\_source

first\_utm\_medium  
utm\_medium

first\_utm\_content  
utm\_content

First\_utm\_campaign  
utm\_campaign

first\_utm\_term  
utm\_term

## Forms

MCAE forms with  
our custom fields  
as hidden text  
input

first\_utm\_  
*Does not Change*

utm\_  
*Changes over time*

## Process

**Downstream  
Field Mapping in  
Salesforce**

**Lead>Contact>Op  
portunity**

# Our Squirrel Trail...

## 2 Steps from UTM to Form



### Blog page with UTMs

UnFettered Marketing

Home Services About Blog Contact in

All Posts Marketing Automation Pardot Tips ActiveCampaign More

Log in / Sign up

Bill Fetter - Sep 8

I'm Speaking at Dreamforce!

dreamforce

Better Lead Attribution with UTM Capture Across Time & Space

September 22, 2022 9:30 am PT

Data/CDP Theater, Moscone West

Bill Fetter, Principal, UnFettered Marketing

I'm speaking at Dreamforce 2022 on Thursday, Sept 22 at 9:30am PT, at the Data/CDP Theater in Moscone West. I'll be demonstrating an easy method to capture inbound UTM variables from third party sites and advertising links and capture them on your Pardot/MCAE forms.

### Website Page

UnFettered Marketing

Home Services About Blog Contact in

dreamforce

UnFettered Marketing

UTM Capture Website Content

Dreamforce Demo Page

Bill Fetter, Principal, UnFettered Marketing

### Landing Page

dreamforce

UnFettered Marketing

Pardot (Marketing Cloud Account Engagement) Landing Page

Dreamforce Demo

Bill Fetter, Principal, UnFettered Marketing

Submit the form to see the UTMs

\*Email (For Demo Purpose Only)

Submit

FORM

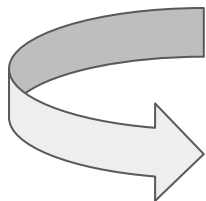


# Here Comes the Demo!

## Links with and without UTMS

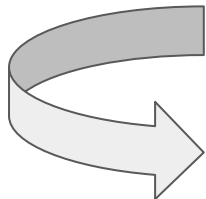
Site page with UTMS

[https://www.unfetteredmarketing.com/post/i-m-speaking-at-dreamforce?utm\\_source=magic-falls&utm\\_medium=link&utm\\_campaign=dreamforce-22-example&utm\\_term=demo&utm\\_content=utm-simple-demo](https://www.unfetteredmarketing.com/post/i-m-speaking-at-dreamforce?utm_source=magic-falls&utm_medium=link&utm_campaign=dreamforce-22-example&utm_term=demo&utm_content=utm-simple-demo)



Site page without UTMS

<https://www.unfetteredmarketing.com/dreamforce>



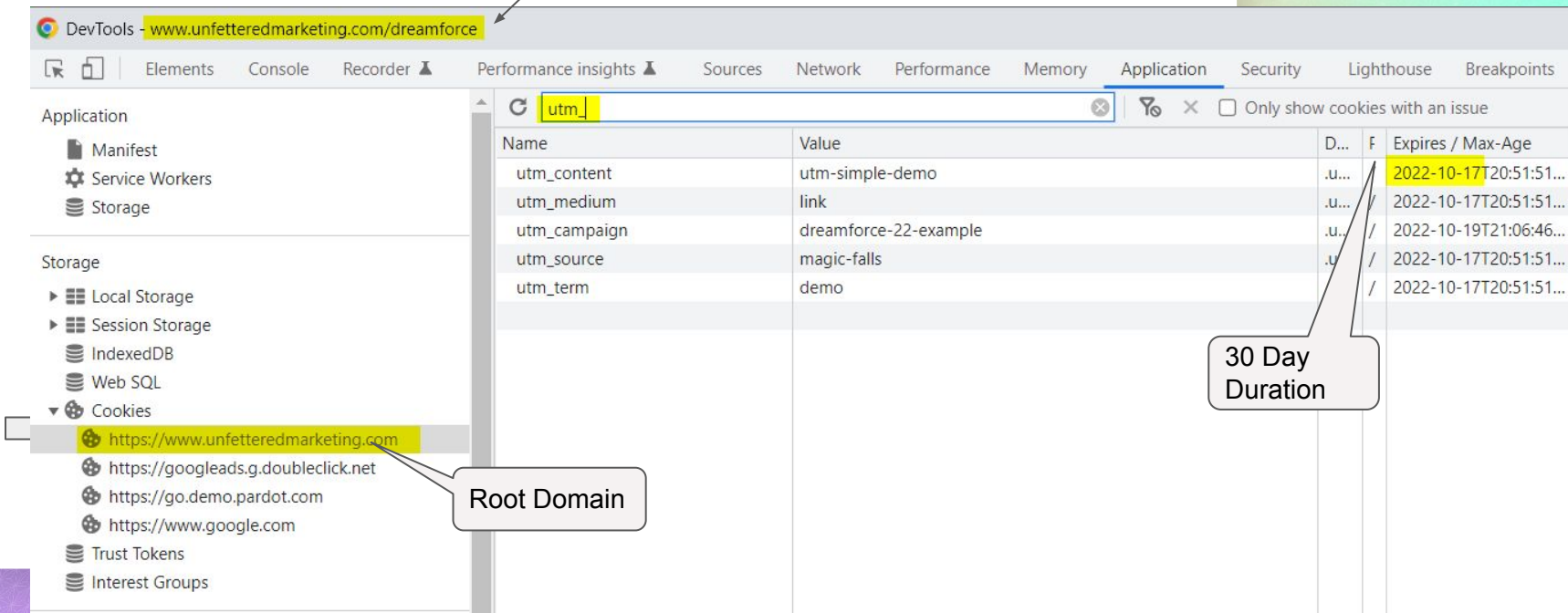
Pardot Landing Page without UTMS

<https://go.unfetteredmarketing.com/dreamforce-22>



# First Party Cookie: Root Domain

Look: no UTMs in that address!



DevTools - [www.unfetteredmarketing.com/dreamforce](http://www.unfetteredmarketing.com/dreamforce)

Application

- Manifest
- Service Workers
- Storage

Storage

- Local Storage
- Session Storage
- IndexedDB
- Web SQL
- Cookies
  - <https://www.unfetteredmarketing.com> (Root Domain)
  - <https://googleads.g.doubleclick.net>
  - <https://go.demo.pardot.com>
  - <https://www.google.com>
- Trust Tokens
- Interest Groups

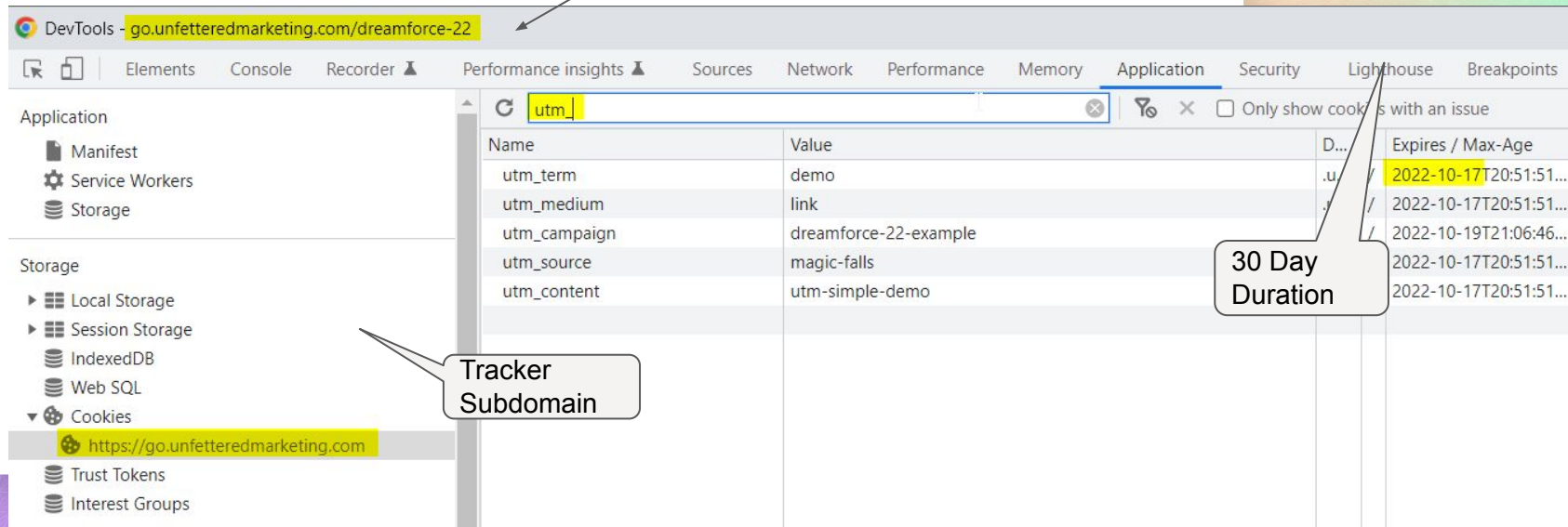
Application tab: [utm\\_](#)

Name	Value	D...	F	Expires / Max-Age
utm_content	utm-simple-demo	.u...		2022-10-17T20:51:51...
utm_medium	link	.u...		2022-10-17T20:51:51...
utm_campaign	dreamforce-22-example	.u...		2022-10-19T21:06:46...
utm_source	magic-falls	.u...		2022-10-17T20:51:51...
utm_term	demo			2022-10-17T20:51:51...

30 Day Duration

# First Party Cookie: Pardot/MCAE Tracker Domain

No UTMs in the address bar here either!



DevTools - go.unfetteredmarketing.com/dreamforce-22

Application

- Manifest
- Service Workers
- Storage

Storage

- Local Storage
- Session Storage
- IndexedDB
- Web SQL
- Cookies
  - https://go.unfetteredmarketing.com
  - Trust Tokens
  - Interest Groups

Cookie Search: utm\_

Name	Value	D...	Expires / Max-Age
utm_term	demo	.u	2022-10-17T20:51:51...
utm_medium	link	.u	2022-10-17T20:51:51...
utm_campaign	dreamforce-22-example	.u	2022-10-19T21:06:46...
utm_source	magic-falls	.u	2022-10-17T20:51:51...
utm_content	utm-simple-demo	.u	2022-10-17T20:51:51...

Tracker Subdomain

30 Day Duration

# Form Setup

For the “First” Fields (First Fill = Set as First Conversion)



## Contents

Name Dreamforce Demo

Folder  /Uncategorized/Forms

Campaign Dreamforce 2022

Tracker Domain Current Primary (<https://go.unfetteredmarketing.com>)

Link <https://go.unfetteredmarketing.com/1/206401/2022-09-09/2fvthl>

Layout Template Standard - V2

### Form Fields

- Email (For Demo Purposes Only) (r) (a) [Default Field: Email]
- utm\_campaign (a) [Custom Field: utm\_campaign]
- utm\_content (a) [Custom Field: utm\_content]
- utm\_medium (a) [Custom Field: utm\_medium]
- utm\_source (a) [Custom Field: utm\_source]
- utm\_term (a) [Custom Field: utm\_term]
- first\_utm\_campaign (a) (m) [Custom Field: first\_utm\_campaign]
- first\_utm\_content (a) (m) [Custom Field: first\_utm\_content]
- first\_utm\_medium (a) (m) [Custom Field: first\_utm\_medium]
- first\_utm\_source (a) (m) [Custom Field: first\_utm\_source]
- first\_utm\_term (a) (m) [Custom Field: first\_utm\_term]

## 10 Hidden Text Fields

- ☒ Always display even if previously completed
- ☐ Do not prefill
- ☒ Maintain the initial value upon subsequent form submissions

## For the “Normal” Fields (Floats for Last Touch)

- ☒ Always display even if previously completed
- ☐ Do not prefill
- ☐ Maintain the initial value upon subsequent form submissions



# Form Setup



JS below form: UTM Simple + Setting Variables to Populate Hidden Fields

## Look and Feel

Layout Template \*

Standard - V2

Choose

Submit Button Text

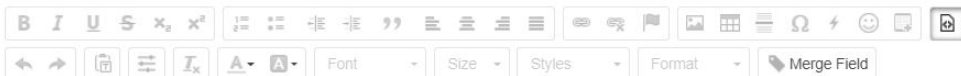
Submit

Above Form

Below Form

Styles

Advanced



```
1 <!-- Global site UTM Simple Tracking Start--><script>
2 var handl_custom_params=['wj_name','wj_email','wj_phone']
3 var handl_js = document.createElement("script");
4 handl_js.setAttribute("src", "https://track.utmsimple.com/utm.js?license=c87f03b0151011ec82f0d93155d4aaf6"), document.head.appendChild(handl_js),
5 handl_js.onload = function() {
6     // Parse the URL
7     function getParameterByName(name) {
8     return HandL.getAll()[name]
9     }
10    // Give the URL parameters variable names
11
```

# Embedding Forms



You can use the same form on your site and your landing pages

## IFrame Embed

Make sure UTM Simple tracking tag is on all your site pages.

add: class="utm-src"  
after opening <iframe in your embed code.

**Note: Your mileage may vary depending on your CMS...**

## Pardot/MCAE Landing Page

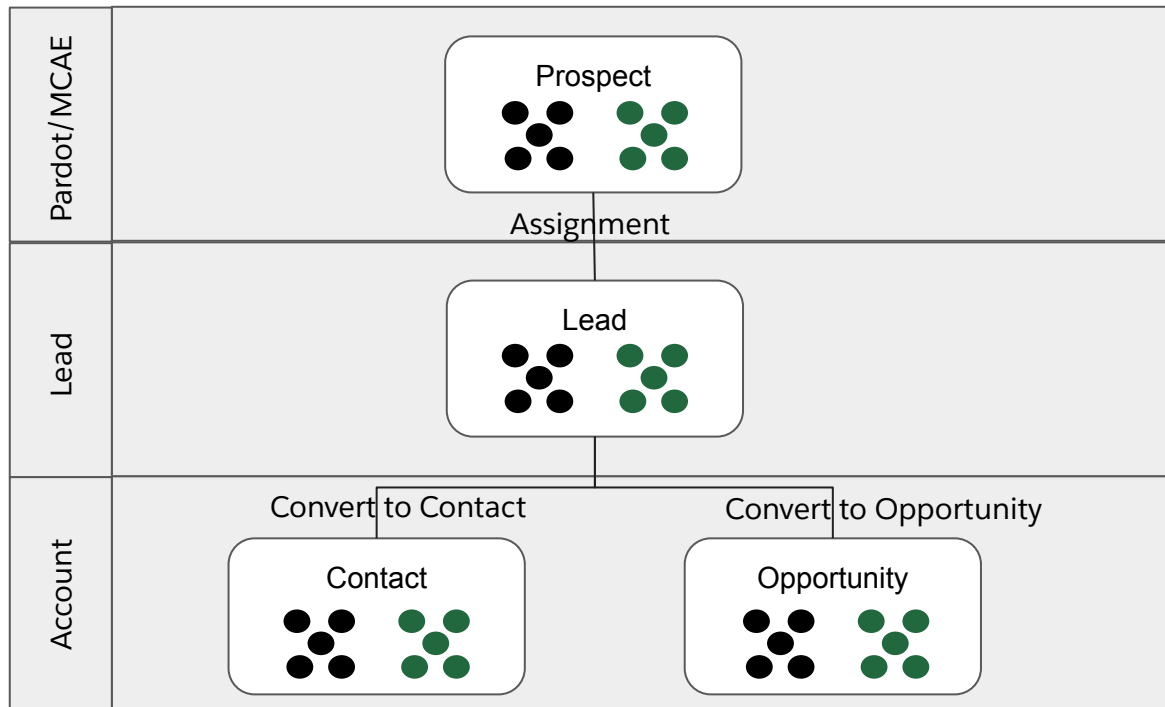
Embed the form with the JS plus the tracking tag in the header.

Remember if using new LP builder to embed your CSS *in the form* in the "above form" section.

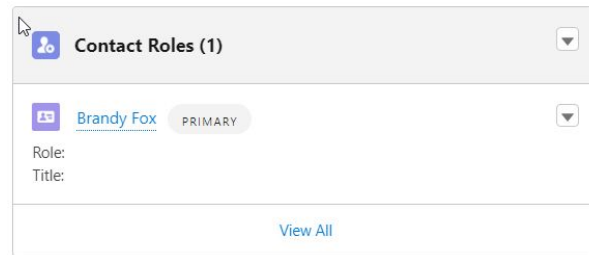
# Use the Standard Lead Conversion Process



It's there for a reason...





You also get an automatic Contact Role!



# Mapping Lead > Contact



Make sure those API names are the same!

ACCOUNT	CONTACT	OPPORTUNITY
 Lead Fields	 Contact Fields	
18 Digit ID	None	
Conversion Object Name	None	
Current Generator(S)	None	
First_utm_campaign	first_utm_campaign	
First_utm_content	first_utm_content	
First_utm_medium	first_utm_medium	
First_utm_source	first_utm_source	
First_utm_term	first_utm_term	



# Mapping Lead > Opportunity



ACCOUNT	CONTACT	OPPORTUNITY
Lead Fields		Opportunity Fields
18 Digit ID		None
Conversion Object Name		None
Current Generator(S)		None
First_utm_campaign		first_utm_campaign
First_utm_content		first_utm_content
First_utm_medium		first_utm_medium
First_utm_source		first_utm_source
First_utm_term		first_utm_term

# The Lead...

[Pardot](#)[Pardot Dashboard](#)[Prospects](#)[Campaigns](#)[Pardot Campaigns](#)[Automations](#)[Landing Pages](#)[Pardot Email](#)[Email Content](#)[Email Tem](#)

Lead

**Brandy Fox**

first\_utm\_source

magic-falls



utm\_source

magic-falls



first\_utm\_medium

link



utm\_medium

link



first\_utm\_campaign

dreamforce-22-example



utm\_campaign

dreamforce-22-example



first\_utm\_content

utm-simple-demo



utm\_content

utm-simple-demo



first\_utm\_term

demo



utm\_term

demo



# Begets this Opportunity



Search...



Pardot Pardot Dashboard Prospects Campaigns Pardot Campaigns Automations Landing Pages Pardot Email Email Content Email Templates CMS Workspaces Content \*Salesforce- More



Opportunity  
Salesforce-

+ Follow New Case New Note Clone

Tracking Number

## UTM Attribution

first_utm_source	utm_source
magic-falls	magic-falls
first_utm_medium	utm_medium
link	link
first_utm_campaign	utm_campaign
dreamforce-22-example	dreamforce-22-example
first_utm_content	utm_content
utm-simple-demo	utm-simple-demo
first_utm_term	utm_term
demo	demo

Created By  
 [Bill Fetter](#), 9/19/2022, 3:25 PM

Description

[Delivery Status](#)

Last Modified By  
 [Bill Fetter](#), 9/19/2022, 3:25 PM

## Contact Roles (1)

[Brandy Fox](#)

PRIMARY

Role:

Title:

[View All](#)

## Partners (0)

## Stage History (1)

Stage: Prospecting  
Amount: \$0.00  
Probability (%): 10%  
Expected Revenue:  
Close Date: 9/30/2022  
Last Modified By: [Bill Fetter](#)

# And this Contact



Pardot   Pardot Dashboard   Prospects   Campaigns   Pardot Campaigns   Automations   Landing Pages   Pardot Email   Email Content   Email Template

Contact  
**Brandy Fox**

0034x00001HTiC0AAL

## UTM Attribution

first_utm_source	magic-falls	utm_source	magic-falls
first_utm_medium	link	utm_medium	link
first_utm_campaign	dreamforce-22-example	utm_campaign	dreamforce-22-example
first_utm_content	utm-simple-demo	utm_content	utm-simple-demo
first_utm_term	demo	utm_term	demo



# Nifty Slack Feature



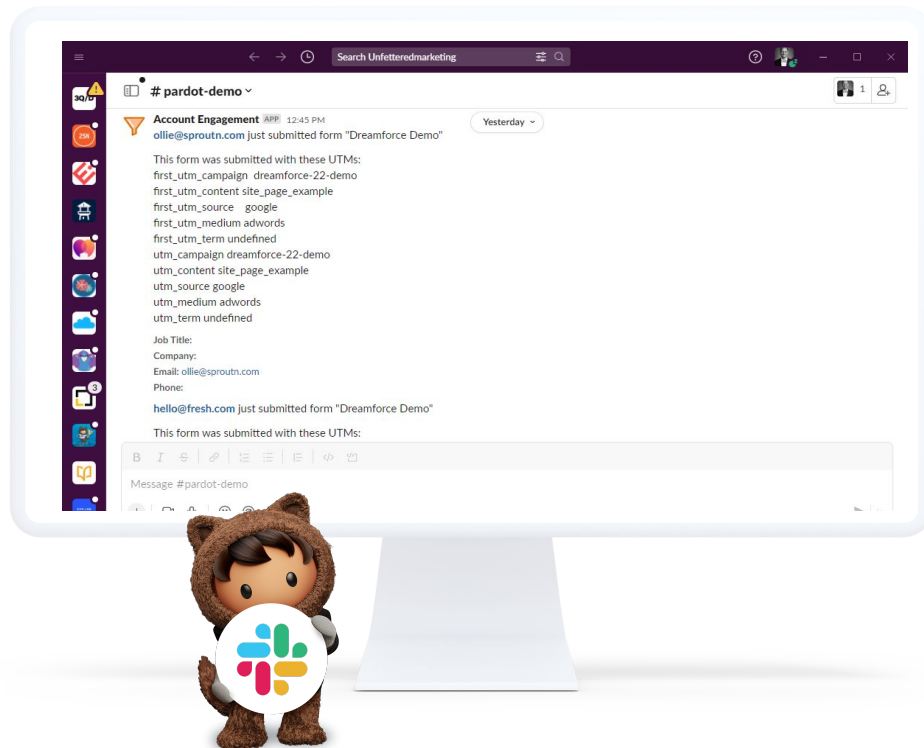
## Conditional Completion Action

### If UTM not blank:

Send Slack Message with Successful UTMs

### If Record is Assigned:

@Mention the Owner



# Resources



## Tips and Tools Mentioned in this Talk

<https://UTMSimple.com>

First Party UTM Cookie Setting. CMS platform agnostic.

<https://UTMGrabber.com>

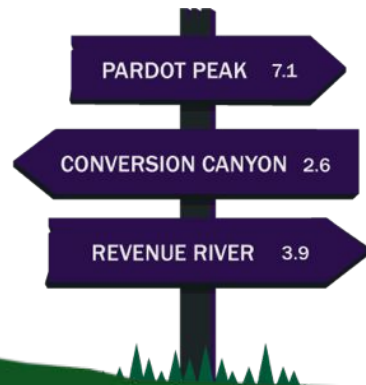
Wordpress plugin equivalent to UTMSimple. Will not work with a Pardot/MCAE landing page.

<https://docs.utmsimple.com>

UTMSimple Knowledge Base

[UTM Capture Javascript Example](#)

[Slack Markdown Tips for Pardot/MCAE Connector](#)



# Special Thanks To Our Sponsors



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THE SPOT  
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 GREENKEY

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# Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

**Bill Fetter**

[Bill@UnFetteredMarketing.com](mailto:Bill@UnFetteredMarketing.com)



# Branding



## Assets

Please use the following assets as you see fit through your presentation.



PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

