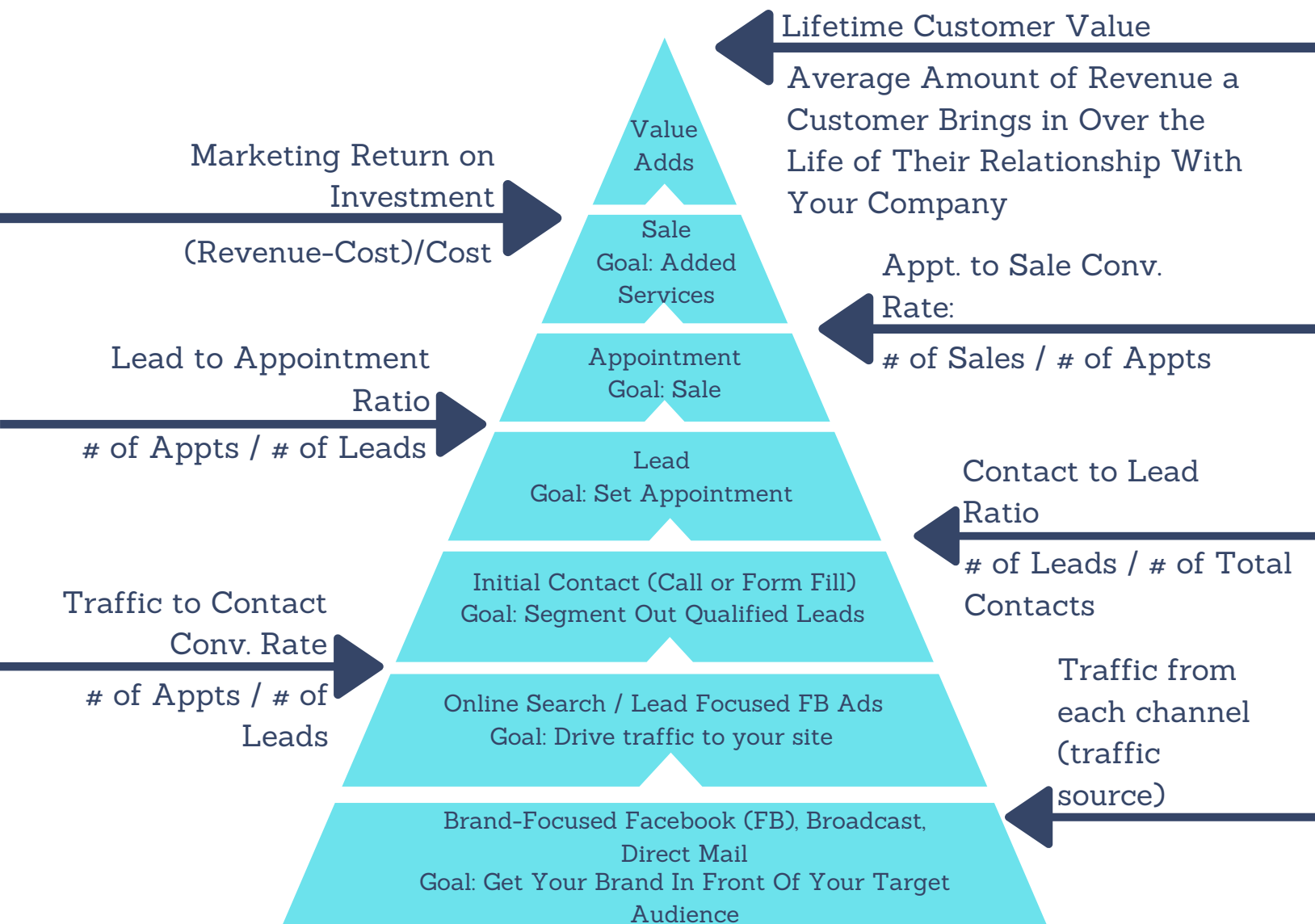


# Tracking Your Marketing Funnel to Improve Leads & Sales

The following is an inverted marketing funnel. These are the metrics you should fill out for each step of your funnel and track monthly. Start at the bottom and work your way up as you fill in the blanks.

After entering each part of the process individually, the information you glean from this will tell you what you need to know about how your funnel is doing as a whole and where improvements can be made to increase sales conversions & revenue.



Book Your Free Digital Marketing Review Call: [ScheduleWithLDM.com](https://ScheduleWithLDM.com)

# 3 Pillars to Understanding How to Get More Leads Online

## Traffic

(Past 90 Days)

How many people have visited your website from:

- Organic traffic through search engines (SEO)
- Paid traffic through search engines (Google Ads or Bing Ads, PPC) via paid search ads or display advertising
- Direct traffic (they typed in your website name directly into the address bar)
- Referral Traffic (other sites & online directories)
- Social Traffic

Web Contacts: How many total people contacted you through your site and online presence?

- Phone calls through a tracked number
- Web form inquiries with name, phone & email completed
- How many came from each traffic channel?
- Website contact conversion rate = total number of contacts from the web / total number of website visitors in your territory

Leads:

- Of the calls and web form inquiries, how many were leads (providing name, email, and phone number) vs. current customers, vendors or non-sales related?
- How many came from each traffic channel?
- Website Lead Conversion Rate = total number of leads from the web / total number of website visitors in your territory

## Conversions

(Past 90 Days)

## Economics

(Past 90 Days)

Appointments

- Of the leads you received from the web, how many appointments did you set?

Sales

- Of the appointments you set from the web, how many turned into sales?
- Calculate your marketing return on investment =  $(\text{Sales Revenue} - \text{Cost of Marketing}) / \text{Cost of Marketing}$





## Expert Tip

This high-level marketing funnel worksheet will reveal where the leaks are, so you can work with your marketing company to fix the areas that are leaking ideal prospects out of your funnel.

However, a great marketing company will be able to identify the leads, appointments, and sales all the way back to the initial online keyword search or ad that hooked them in.

When they have this level of data, they are then able to allocate your budget more towards what works and less towards what doesn't - improving the conversion rate at each step!

**Our team can better help you understand where the leaks are in your funnel & how to fix them.**

**Schedule Your Free  
Strategy Session Today!  
[ScheduleWithLDM.com](https://ScheduleWithLDM.com)**

**Phone: (866) 671-0716**

## Important Phrases & Definitions

### Traffic

- People who visit your website

### Web Contact

- Anyone who contacts you from your web presence (website, social, online directories, etc.)

### Conversion Rate

- The rate at which a prospect takes the next step in your marketing funnel

### Lead

- A person interested in your products and services who provide you their name, email and phone number

### Appointment

- Leads that schedule a time with your team to come to their home

### Sale

- Purchase, rental, or finance of equipment or services from your team

