



Better Lead Attribution with UTM Capture

Across Time and Space

Bill Fetter

Principal, UnFettered Marketing



Bill Fetter

Principal and Founder
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Salesforce Marketing Champion

<https://unfetteredmarketing.com/blog>
<https://linkedin.com/in/billfetter>
<https://trailblazer.me/id/wfetter>



Who is this For?



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

Using third party traffic generation to your website:

- Banner Ads

- Pay Per Click

- Remarketing

- Third Party Ad Placements

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...



Pardot (MCAE)
Landing Page



Contact us

| |
|---------|
| Name |
| Email |
| Message |

SEND

Website Page 1



Website Page 2



Website Page 3



Contact us

| |
|---------|
| Name |
| Email |
| Message |

SEND



The Basic Problem

UTMs are only good on the same visit...



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Website Page 3



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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

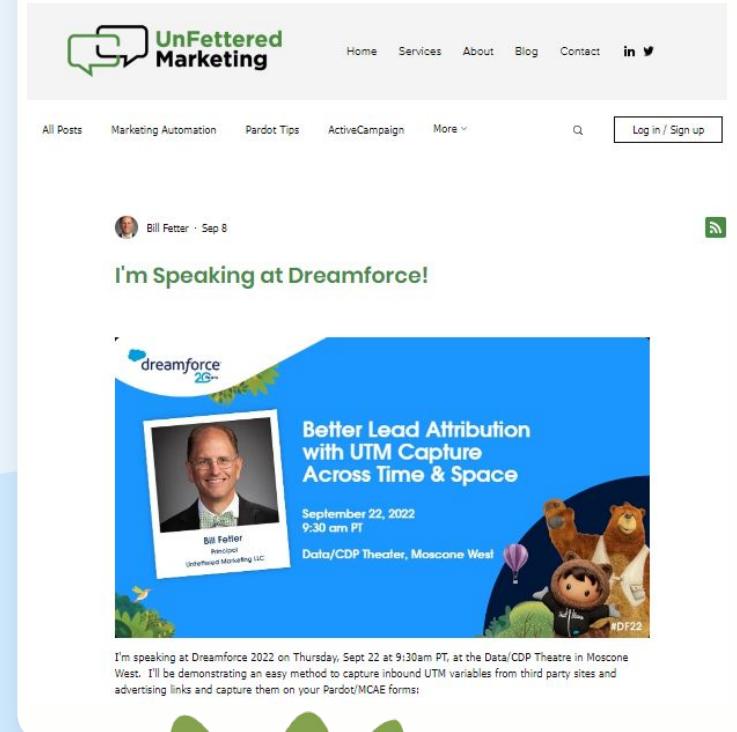
Lead>Contact>
Opportunity

Our Squirrel Trail...

2 Steps from UTM to Form



Blog page with UTMs



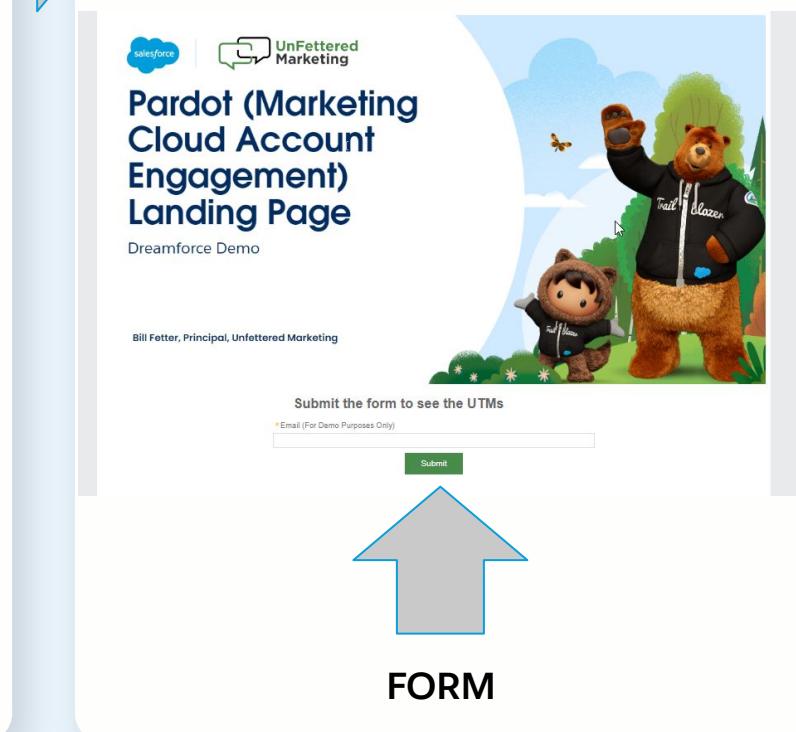
A screenshot of a blog post on the UnFettered Marketing website. The post is titled "I'm Speaking at Dreamforce!" and features a photo of Bill Fetter. Below the photo, there is a large blue banner with text about a lead attribution demo at Dreamforce 2022. The banner includes a photo of Bill Fetter and the text "Better Lead Attribution with UTM Capture Across Time & Space". The post is dated September 22, 2022, at 9:30 am PT, at the Data/CDP Theater in Moscone West.

Website Page



A screenshot of a website page titled "UTM Capture Website Content Page". The page features a background illustration of a forest with a cabin and several cartoon animals (a bear, a squirrel, a fox, and a rabbit). The text on the page includes "dreamforce" and "UnFettered Marketing". It also includes a "Dreamforce Demo Page" link and the name "Bill Fetter, Principal, UnFettered Marketing".

Landing Page



A screenshot of a landing page titled "Pardot (Marketing Cloud Account Engagement) Landing Page". The page features a background illustration of a forest with a large bear and a small character. The text on the page includes "salesforce" and "UnFettered Marketing". It also includes a "Dreamforce Demo" link and the name "Bill Fetter, Principal, UnFettered Marketing". At the bottom, there is a form with a "Submit" button and the text "Submit the form to see the UTMs".

FORM

First Party Cookie: Root Domain

Look: no UTMs in that address!



DevTools - www.unfetteredmarketing.com/dreamforce

Elements Console Recorder Performance insights Sources Network Performance Memory Application Security Lighthouse Breakpoints

Application

- Manifest
- Service Workers
- Storage

Storage

- Local Storage
- Session Storage
- IndexedDB
- Web SQL

Cookies

- <https://www.unfetteredmarketing.com>
- <https://googleads.g.doubleclick.net>
- <https://go.demo.pardot.com>
- <https://www.google.com>
- Trust Tokens
- Interest Groups

Only show cookies with an issue

| 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 | .u... | / | 2022-10-17T20:51:51... |

30 Day Duration

Root Domain

First Party Cookie: Pardot/MCAE Tracker Domain



No UTMs in the address bar here either!

DevTools - go.unfetteredmarketing.com/dreamforce-22

Elements Console Recorder Performance insights Sources Network Performance Memory Application Security Lighthouse Breakpoints

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Cookies

- https://go.unfetteredmarketing.com
- Trust Tokens
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utm

| Name | Value | D... | F... | Expires / Max-Age |
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| utm_term | demo | .u... | / | 2022-10-17T20:51:51... |
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| 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... |

Only show cookies with an issue

30 Day Duration

Form Setup

10 Hidden Text Fields



Contents

Name Dreamforce Demo

Folder  /Uncategorized/Forms

Campaign Dreamforce 2022

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

Link <https://go.unfetteredmarketing.com/l/206401/2022-09-09/2fvth>

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]

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

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 *

Submit Button Text

Above Form Below Form Styles Advanced

Font Size Styles Format Merge Field

```
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

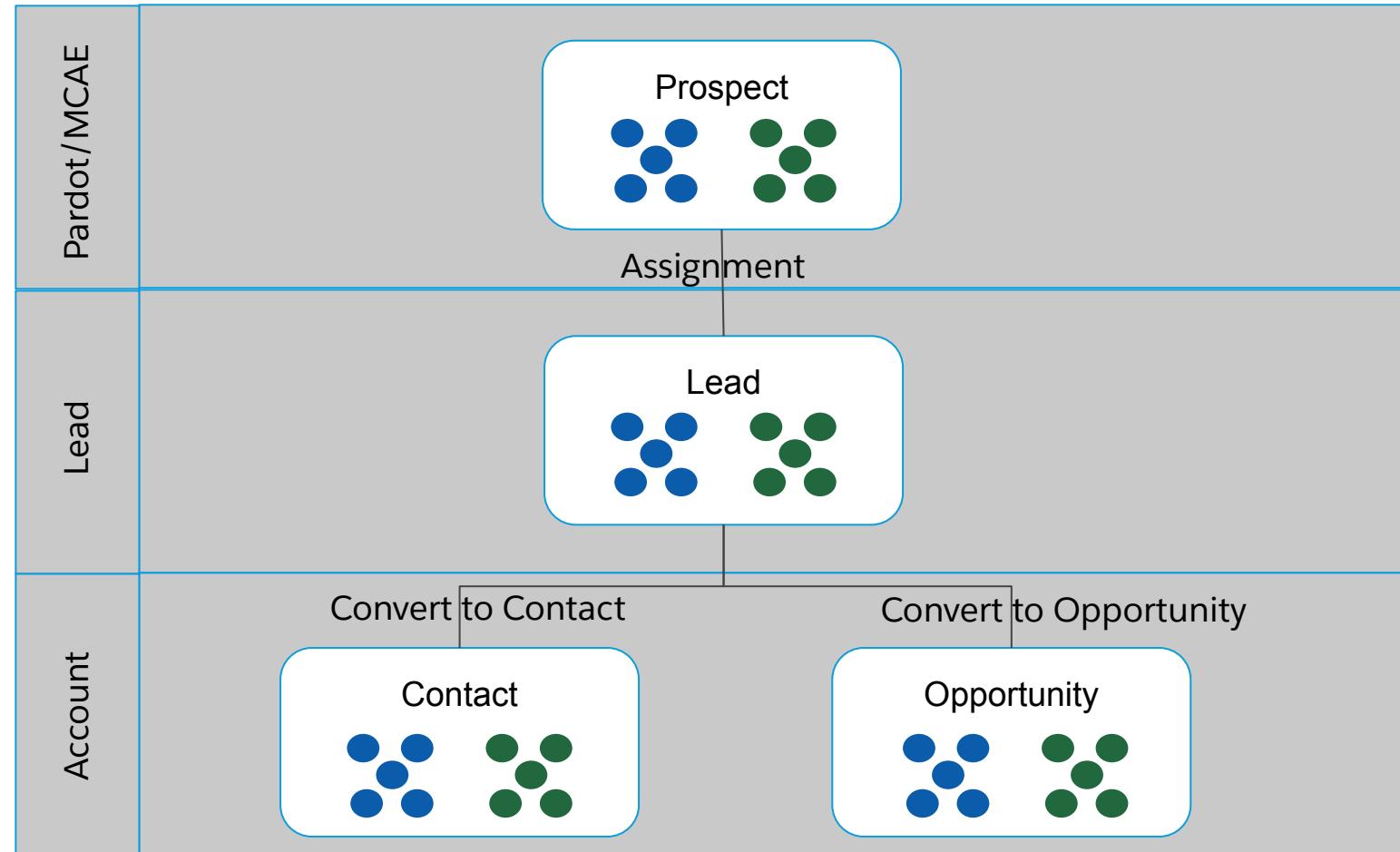
Embed the form with the JS plus the tracking tag in the header.

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

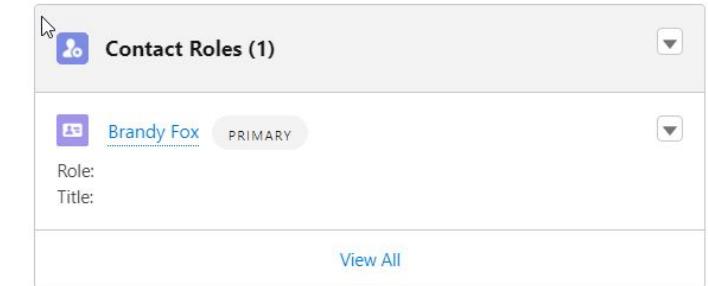
Use the Standard Lead Conversion Process



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 | |
| 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

This only works on a lead conversion...



| ACCOUNT | CONTACT | OPPORTUNITY |
|------------------------|---------|--|
| | |  Lead Fields |
| 18 Digit ID | |  Opportunity Fields |
| 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...

Converted...



Search...

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

Lead
Brandy Fox

first_utm_source

magic-falls

first_utm_medium

link

first_utm_campaign

dreamforce-22-example

first_utm_content

utm-simple-demo

first_utm_term

demo

utm_source

magic-falls

utm_medium

link

utm_campaign

dreamforce-22-example

utm_content

utm-simple-demo

utm_term

demo



Begets this Opportunity



UnFettered Marketing

Search...

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

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



Search...



Pardot

Pardot Dashboard

Prospects

Campaigns

Pardot Campaigns

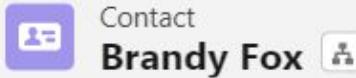
Automations

Landing Pages

Pardot Email

Email Content

Email Template



0034x00001HTiC0AAL

▼ UTM Attribution

first_utm_source

magic-falls

first_utm_medium

link

first_utm_campaign

dreamforce-22-example

first_utm_content

utm-simple-demo

first_utm_term

demo

utm_source

magic-falls

utm_medium

link

utm_campaign

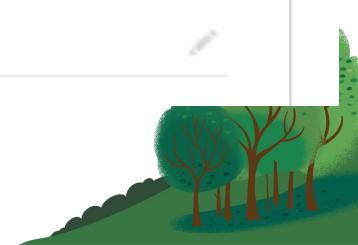
dreamforce-22-example

utm_content

utm-simple-demo

utm_term

demo



Nifty Slack Feature

Conditional Completion Action

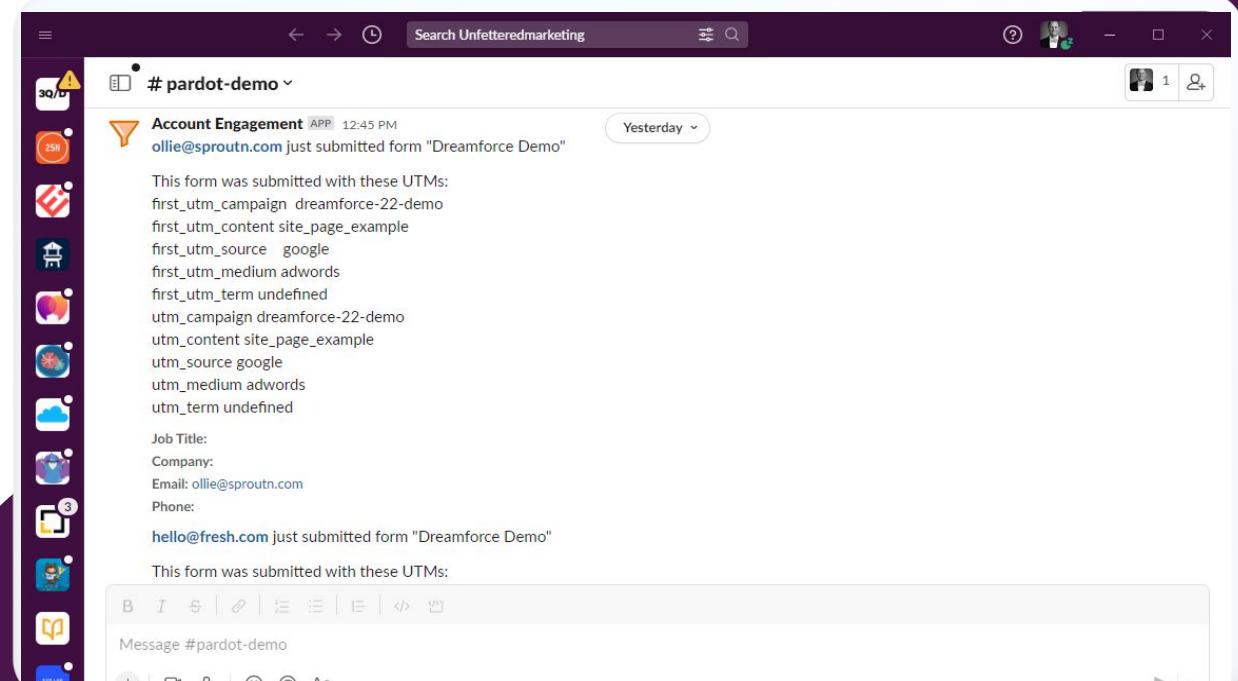


If UTM not blank:

Send Slack Message with Successful UTMs

If Record is Assigned:

@Mention the Owner





Thank you



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](#)

