



Better Lead Attribution with UTM Capture

Across Time and Space

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Who is this For?

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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...

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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...

salesforce



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



Required Elements

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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

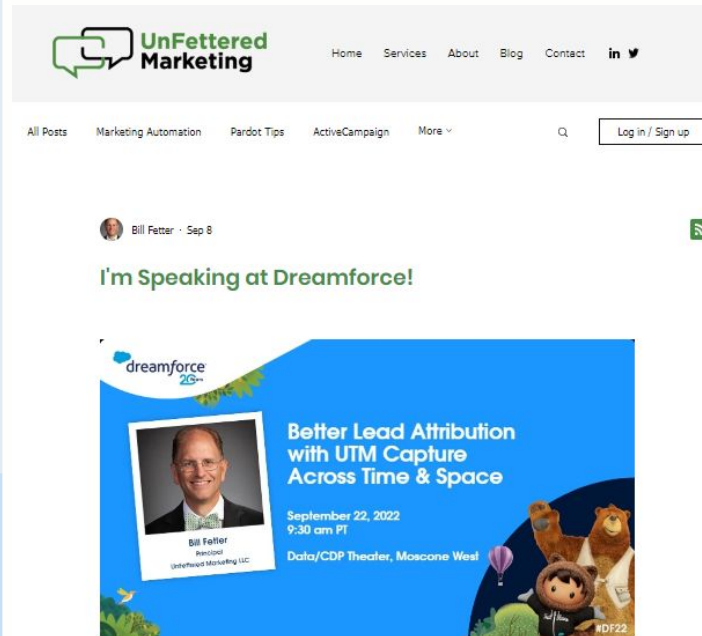
Lead>Contact>
Opportunity

Our Squirrel Trail...

2 Steps from UTM to Form

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Blog page with UTMs



Website Page



Landing Page



FORM

First Party Cookie: Root Domain

Look: no UTMs in that address!

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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

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

Root Domain

30 Day Duration

First Party Cookie: Pardot/MCAE Tracker Domain

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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

Application

- Manifest
- Service Workers
- Storage

Storage

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

Tracker Subdomain

utm_

Name	Value	D...	F	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...

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/206401/2022-09-09/2fvtlh>

Layout Template Standard - V2

Form Fields

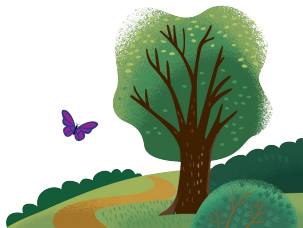
- Email (For Demo Purposes Only) (r) (a) [Default Field: Email]
- utm_campaign (a) [Custom Field: utm_campaign]
- utm_content (a) [Custom Field: utm_content]
- utm_medium (a) [Custom Field: utm_medium]
- utm_source (a) [Custom Field: utm_source]
- utm_term (a) [Custom Field: utm_term]
- first_utm_campaign (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





Embedding Forms

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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

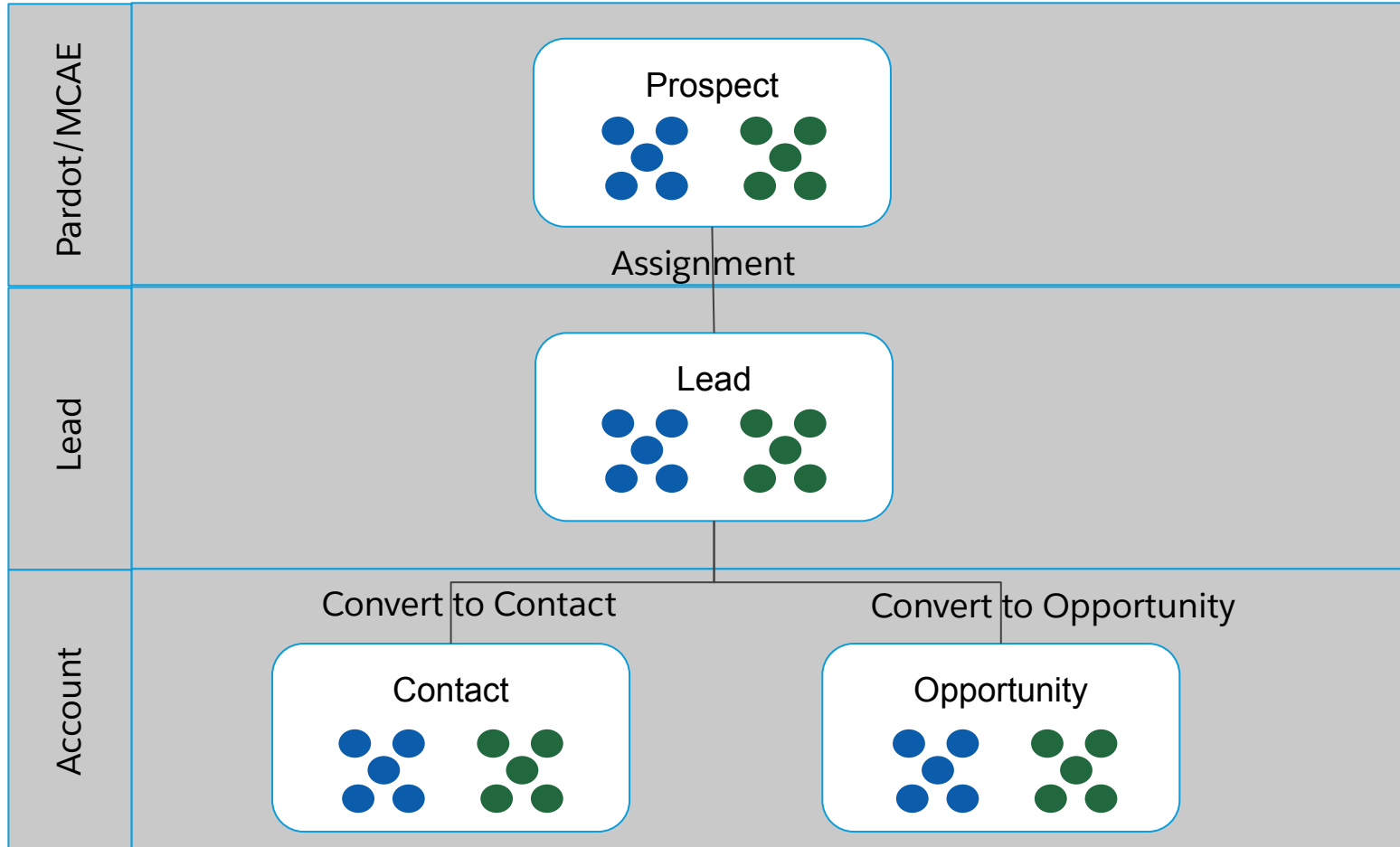
Embed the form with the JS plus the tracking tag in the header.

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

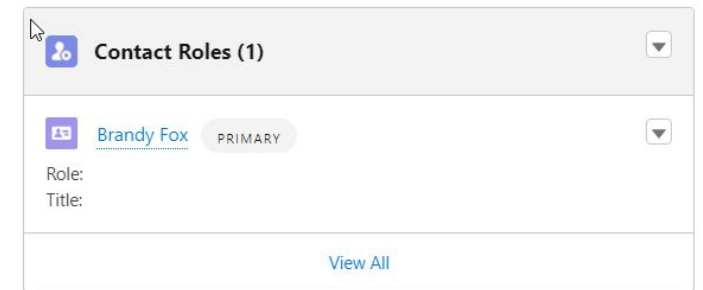
Use the Standard Lead Conversion Process



It's there for a reason...





You also get an automatic Contact Role!

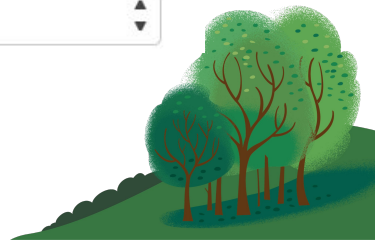


Mapping Lead > Contact

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



This only works on a lead conversion...

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...

Converted...



Search...

Lead

Brandy Fox

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	



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



- + 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	Last Modified By
Bill Fetter, 9/19/2022, 3:25 PM	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



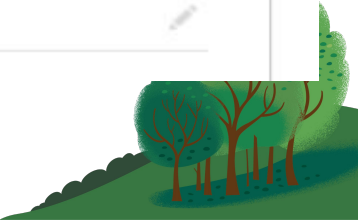
- Pardot
- Pardot Dashboard
- Prospects
- Campaigns
- Pardot Campaigns
- Automations
- Landing Pages
- Pardot Email
- Email Content
- Email Template

Contact

Brandy Fox

0034x00001HTiCOAAL

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	



Nifty Slack Feature

Conditional Completion Action

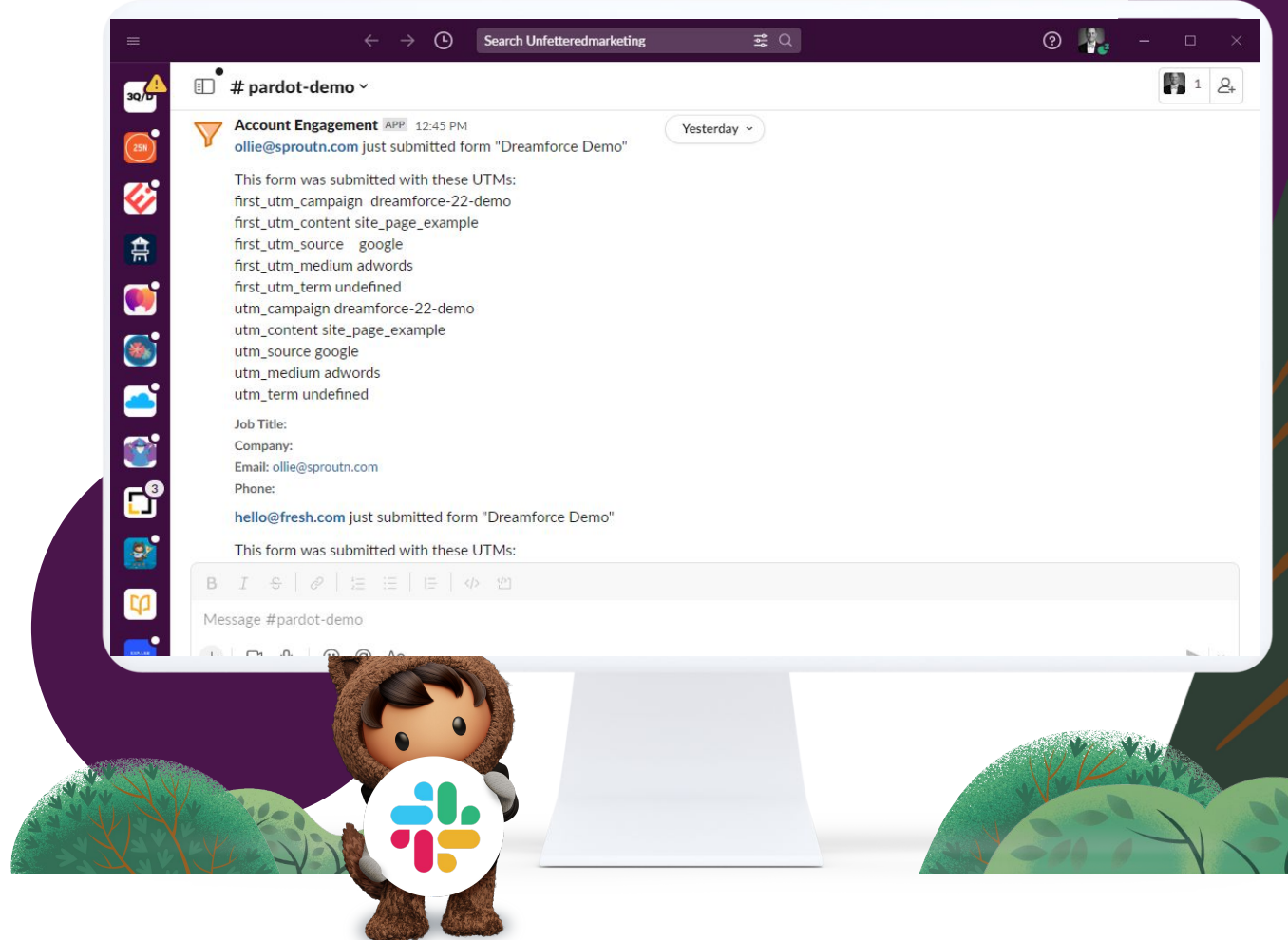
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If UTM not blank:

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](#)

