



CUSTOM OCT

BEFORE

Lead Gen



Background:

- Offline conversion tracking (OCT) allows platforms to optimize towards down funnel events, instead of the standard 'Lead' events. OCT allows optimization towards true ROI metrics, increases lead quality, and increases visibility into performance metrics beyond just 'Leads Generated.' The process involves connecting Specific Ad data to the clients CRM and following the Lead through the sales cycle all the way to a closed won or revenue metric.

The Problem

- We have a robust solution for standard CRM platforms, but many agencies around the world face a significant challenge when clients use non-standard systems—or don't have a CRM at all—which leaves OCT without an effective solution. In the past, agencies would receive lists of quality leads from clients, and team members would spend valuable hours manually uploading them to the correct platforms. This tedious process not only drained productivity but also diverted focus from more impactful work.

DURING

The Solution

We created templated and automatic work flows to send offline conversions without the need for Standard CRMs or manual uploads. These automations and workflows save countless hours and enable our teams to see and optimize towards: revenue metrics, quality lead metrics, and more.

- Odegaard Miller Law
- Bradley / Gombracher
- CJE Restoration
- And more...

AFTER

The Results

- **Solution where previously was thought impossible:** Because of this setup, we open the door for several other clients to setup offline conversion tracking so that we can optimize towards true revenue for our clients.
- **Allow for Platforms to Optimize for actual Revenue/Quality Leads:** On these accounts previously we did not have the visibility in-platform of the quality of leads we were driving. With this setup we not only have the visibility but now can understand the levers required to increase lead quality.
- **Decrease Manual Effort Required for OCT:** Previously, the effort required to manually upload Conversion data was taking valuable time away from our platform specialists. With this new setup, there is little to no manual work required. This saves our team members critical hours during their week.
- **Templated Process to repeat on multiple clients:** With this setup we created templated workflows in our ETL and automation tools in order to onboard clients in a short amount of time.

Custom Automated Lead Scoring

<div>Qualified lead</div> <div>Account default goal: 30 of 50 campaigns</div>			
<input type="checkbox"/> Conversion action	Action optimization	Conversion source	All coins
<input type="checkbox"/> Qualified lead 1*	Secondary	Website (Import from clicks)	13.30
<input type="checkbox"/> Qualified lead 2*	Secondary	Website (Import from clicks)	8.30
<input type="checkbox"/> Qualified lead 3*	Secondary	Website (Import from clicks)	1.00
<input type="checkbox"/> Qualified lead 4*	Secondary	Website (Import from clicks)	0.00
<input type="checkbox"/> Qualified lead 5*	Secondary	Website (Import from clicks)	0.00

https://docs.google.com/presentation/d/1VWcv3enSH6hguEjLa3kjVbdRoqEJyKEkqifsT86c_Cl/edit?slide=id.g2d91e662840_0_0#slide=id.g2d91e662840_0_0