



The Complete Guide to

# TRACKING LEADS

A lead tracking toolkit for growing  
pest control & lawn care businesses



# Here's your new Lead Tracking Toolkit!

In a perfect world, great leads would fall into your lap.

In real life, it takes a lot of hard work, branding, strategy, and money to bring in the right potential customers.

It can take even more hard work, branding, strategy, and money if you're not properly tracking those leads.

Lead tracking is the not-so-secret sauce behind the highest performing businesses in the industry. Defining a lead and building a system to track them is an essential step in growing your business, helping you understand how your marketing is performing and providing the right details for seamless follow-up.

At Coalmarsh, we've been working with leading pest and lawn industry companies across the country for over 10 years, helping them identify and hit their revenue and growth goals using highly effective digital marketing.

Lead tracking - and the data that accurate lead reporting can provide - is so fundamental to achieving sustainable growth for your business that we've decided to compile some of the resources and processes we typically share with new clients into one toolkit to help you master your lead tracking.



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# What is a Lead?

Put simply, a lead is anyone who has communicated interest in using your product or service.

That's where the common definition starts and ends.

**Every company defines leads differently, and some don't define them at all.**

To succeed, you need sales. And to get sales, you need a structured, consistent, and repeatable process that puts leads into your pipeline. So while these variations may not seem like they mean much, in the context of your sales and marketing strategy, they mean everything.

Every step of the sales funnel works with the others to produce growth and results. But without proper reporting to understand where your efforts and marketing dollars are most efficiently and effectively generating the leads you need in order to hit your sales targets, you'll miss out on your full sales potential.

Disciplined lead tracking means having your finger on the pulse of your business, and is the key to keeping it healthy for the long haul. In short, what you don't know about lead tracking can make or break your business.



# Why Should You Care?

The importance of having a lead tracking system goes deeper than a number of calls or webform submissions. Leads are the lifeblood of your growth strategy, and without them your company will stagnate.

**In the short term**, it's just good business.

Immediate-need services, like pest control, have a short window for decision-making. A potential customer might call or visit your site with the intention of comparing prices or services. If they don't follow up, and you have no way of contacting them, that's a dead lead.

Tracking that outreach and collecting contact information allows you to follow up - and to do it on your own terms.

**In the long term**, it's how you develop your complete database. Keeping records of current customers, customers who haven't returned, and non-customers gives you an active and engaged list of prospects for upselling or retargeting.

No lead is truly "lost" if you've got the information you need to reach out to them in the future.

**On the whole**, a thorough lead tracking system paints a picture of your business's overall health and sets you up for success on three main levels:

1. **As an owner, you will have reliable data in hand that can guide your growth strategy.**
2. **Your sales team will be better equipped to handle leads, and their individual effectiveness will be easier for you to track.**
3. **Your marketing team, whether in-house or hired out, will be able to see what channels are most effective and where your money is best spent.**

# Where Do You Stand?

We've established that the baseline for a lead is anyone who has communicated interest in using your product or service.

The most common variations for lead definition that we've seen among our clients and other players in the industry are:

1. Contact from anyone in their service area, regardless of service requested
2. Contact from anyone in their service area for services they offer
3. Proposal sent or bid submitted
4. Service completed

In some cases, we've even worked with companies who will use all of these definitions at any given time. That's where they run into trouble.

**As a business owner, it is critical to clearly define what counts as a lead for your business, and to make sure that your team is consistently measuring performance against that definition.**

To do that, think through all of the potential lead scenarios that you and your team come across. Let's go through some examples.



# Examples

Example 1




You are a lawn care company. Someone calls to ask about tree trimming, a service you don't offer. They saw your company name when they Googled "landscaping solutions near me."

**DO YOU COUNT THEM AS A LEAD?**

**WHY OR WHY NOT?**

 **YES it's a lead**

 **NO it's not a lead**

Example 2




You are a pest control company. Someone submits a contact form on your website asking for an estimate for your recurring mosquito service package, a service you do provide.

**DO YOU COUNT THEM AS A LEAD?**

**WHY OR WHY NOT?**

 **YES it's a lead**

 **NO it's not a lead**

Example 3



You are a plumbing company that offers 24 hour emergency service. Someone contacts you about a broken pipe in their basement. They request immediate service.

**DO YOU COUNT THEM AS A LEAD?**

**WHY OR WHY NOT?**

 **YES it's a lead**

 **NO it's not a lead**

# Answer Sheet

If you said “no” to any of these scenarios, we have news for you...

**You're leaving valuable data - and money - on the table.**

In Example 1, you've received a call about a service you don't provide.

**Why count them as a lead?**  
**Two reasons.**

1. They found you online when looking for the keywords you want to rank for. That's great! That will help guide your marketing efforts.
2. They could need lawn services in the future. Why not keep them on your contact list for future promotions?

In Example 2, you've received a webform entry requesting a service you do provide.

**Why count them as a lead?**

Because they've directly expressed interest in your services and requested an appointment. Even if they're waiting to be contacted by your team or haven't supplied all of the information for a formal appointment to be made, they have signaled to you that they're interested.

In Example 3, you've received a call about an emergency service.

**Why count them as a lead?**

A lead isn't just someone who has expressed interest and is in the waiting period between contact and service. Even if they immediately become a paying customer, all of their information should be gathered and documented the same as any other lead.



# Ways to Define a Lead

Regardless of whether your marketing team is in-house or an agency, it's essential to the livelihood of your business that you have a clear definition of a lead and firm metrics for your lead numbers and close rate.

As a digital marketing partner, it's crucial for us to understand how our clients have been measuring past success and to make sure our expectations are aligned.

One of the first things we do when we begin working with a new client is collect information about growth goals, past marketing performance, and sales closing rate. We compare what our clients (or their old marketing companies) reported as leads to the information we see in Analytics, so we can set performance goals that will help drive the results needed to achieve growth, but that are also realistic in the context of past performance.

**After working with nearly 100 pest control and lawn care companies around the country, we've narrowed down our definition of a lead into two categories.**

## Creative Lead

A Creative Lead is a non-current customer who contacts a business with the belief that the business provides a service that will address their need, after interacting with the business's brand, either online or offline.

## Generated Lead

A Generated Lead is anyone who expresses an interest in a business's services after having been contacted by a representative or entity of that business.

Notice that both require that a lead becomes a lead as soon as they contact your business about a service. There are no caveats.

If they're out of your service area, or you don't provide the service they're looking for, or even if they're current customers looking for a new service, they're still a lead. Why? Because that still gives you, your sales team, and your marketing team valuable information about your brand recognition and marketing effectiveness.

# Why Tracking Those Leads Matters

## Lead tracking in action

In 2018, the bugman was growing fast and moving up on the PCT Top 100 list - and owner Brian Olson knew that in order to stay there, he had to make some changes and invest in systems that could help him stabilize his growth and invest his budget in the right places.

Coalmarch pulled out all the stops: Designing a high-performance website, showcasing the bugman's stellar reputation in branded advertisements, and launching expertly targeted paid campaigns - but the biggest change for the bugman was the access to valuable data that came from those campaigns.

After years with limited data available and siloed in various platforms, Brian suddenly had access to data about where his top customers were coming from and where his marketing budget was best utilized.

With depth of analysis available with new tracking capabilities, he could see that his PPC campaigns were driving valuable conversions - even in deeply competitive markets.

The Coalmarch team used incoming lead data to optimize Google Ads and Local Services by Google campaigns to perform even more cost-effectively - resulting in a 61% increase in paid leads over last year and skyrocketing the bugman towards achieving their aggressive growth goals.

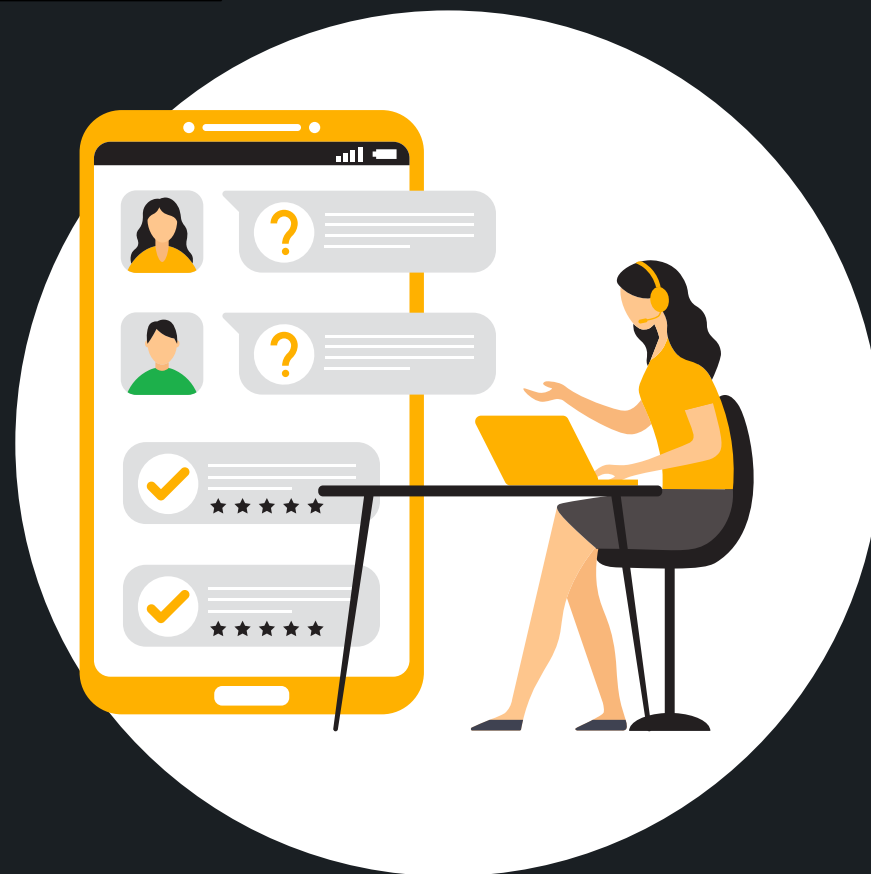


# Can't I Just Ask my Customers?

**NOPE!** Turns out - the customer isn't always right.

Tracking your marketing performance by asking customers how they found you, particularly online, is a mistake for two reasons:

1. **The devil is in the details.** The average person doesn't know the difference between a paid ad, a Local Services ad, or an organic listing. They might know they came in from "Google," but they're going to be unreliable when it comes to delivering data about which campaigns, keywords, or ads brought them there.
2. **The fastest route is always a straight line.** Every piece of information that your sales team or webform requires of your potential clients is a barrier to winning the sale. Don't bog potential customers down with details that only matter to you.



### A note on attribution:

There are a variety of attribution models used in businesses worldwide, but two of the simplest, most commonly used are First Touch and Last Touch.

1. **First Touch:** This measures what first got a lead interested in your brand. The goal is to measure the success of various tactics (SEO, PPC, display advertising, social media, etc.) at raising awareness amongst buyers.
2. **Last Touch:** This measures what gets your leads to convert - in other words, what made them a "lead."

First Touch attribution seems simple, but it can be quite tricky to implement without specific tools and automation to fill in the gaps of data between the first interaction a potential customer has with your brand and the moment they turn into a qualified lead.

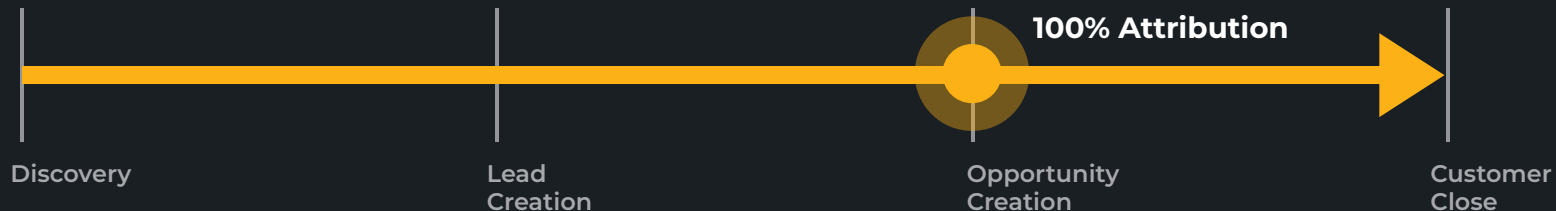
While there's still plenty of valuable insights available about the performance of specific channels in building awareness of your brand, most lead tracking systems are built on a Last Touch model.

Using Google Analytics to track lead performance allows you to see which specific pages on your website, which paid campaigns, and which searches are driving results.

#### FIRST TOUCH MODEL



#### LAST TOUCH MODEL


























# How We Track it

We use a combination of Google Analytics and Call Tracking Metrics to drill down on specific lead sources. This allows us to house lead data consistently in one place, so you can see performance as a whole or broken down, consistently collecting inbound lead data from:

1. Webforms
2. Incoming Phone Calls
3. Incoming text messages



These are the lead sources that we recommend tracking every day:			 New Visitor	 Current Visitor
OFFLINE	ONLINE (OFF-SITE)	WEBSITE TRACKING		
Word of mouth/referral 	Deal Sites ( <i>Groupon, Angie's List</i> ) 	Organic Traffic 		
Door-to-door 	Pre-screened Professionals 	Direct Traffic 		
Direct Mail  	( <i>HomeAdvisor, Amazon Home Services, Thumbtack</i> )	Google Ads Traffic 		
Vehicle 	Facebook 	Local Services by Google traffic 		
Outdoor Advertising 		Referral Traffic ( <i>Yelp, BBB</i> ) 		
Technician Generated 		Social Media  		
Outside Sales Generated 		Email Marketing 		
Inside Sales Generated  				

# How We Track it (Cont'd)

Once you're tracking lead source data, spend, and conversion, it's important to put that data together in a way that allows you to easily see performance.

Starting from scratch? **A simple spreadsheet and some Analytics data can help you crunch the numbers to highlight:**

- CPL by channel
- Conversion rate by channel
- How your lead performance stacks up compared to your goals
- Paid vs. non-paid CPL
- Paid vs. non-paid CPL
- How your lead performance stacks up over last year

Already have tracking set up, but looking to take it a step further?

We break down lead tracking data for our clients on dashboards designed to make it really easy for business owners to get the pulse of their marketing performance.



## **Paid** Google Local Services

Spend YTD **\$20,321**      Leads YTD **354**      Cost Per Lead YTD **\$61.37**

Month ^	Spend	Leads	Cost Per Lead
January	\$584	8	\$73
February	\$680	10	\$68
March	\$1,275	25	\$51
April	\$3,452	73	\$47.29
May	\$6,390	115	\$55.57
June	\$5,677	92	\$61.71
July	\$2,263	31	\$73

*CoalMarch shows our clients how each paid ad platform is performing month to month and year to date.*

## **Paid** Performance

(Google Ads, Microsoft Advertising, Google Local Services)

Ad Spend YTD **\$237,247**      Traffic YTD **10,149**      Leads YTD **1,093**      Conversion Rate YTD **7.76%**      Cost Per Lead YTD **\$203.08**

Month ^	Ad Spend	Traffic	Leads	Cost Per Lead	Cost Per Lead
January	\$10,816	730	62	7.4%	\$174.45
February	\$9,184	577	67	9.88%	\$137.07
March	\$17,992	943	96	7.53%	\$187.42
April	\$36,761	957	160	9.09%	\$229.76
May	\$41,893	1,474	214	6.72%	\$195.76
June	\$81,635	3,789	344	6.65%	\$237.31
July	\$38,966	1,679	150	7.09%	\$259.77

*Total paid lead performance aggregates spend and performance across all paid platforms. Monthly data as demand fluctuates helps you and your marketing team gauge when to scale budget back and when there's an opportunity to spend more.*

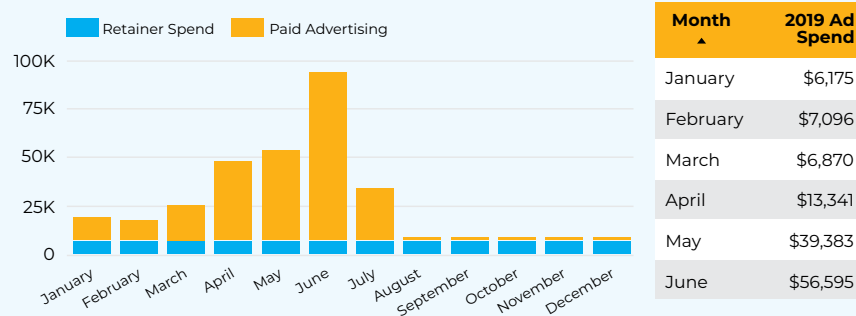
## How We Track it (Cont'd)

There is immense value in being able to dig deeper on how individual organic or paid channels are performing, but if you're only looking at those metrics individually, it's easy to get lost in the details and miss the big picture.

If you've defined what counts as a lead and you're tracking it consistently, bringing together performance across channels for a holistic measure of performance can help you see where you stand compared to your goals.

### Overall Marketing Spend

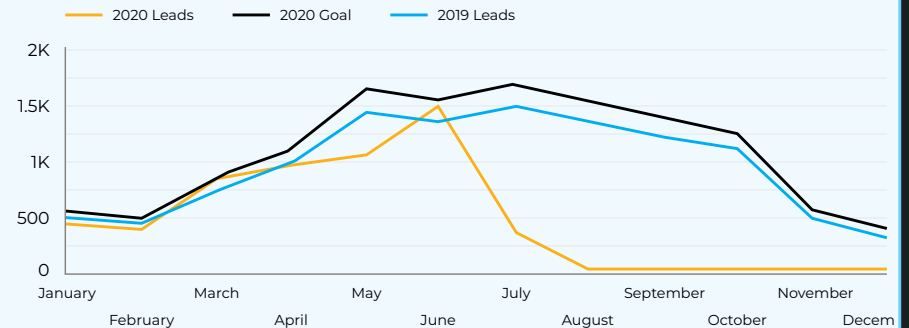
Total Spend YTD **\$293,642**   Paid Spend YTD **\$241,142**   Organic Spend YTD **\$52,500**   Average CPL **\$51.37**



*See the full breakdown of spend and average CPL across all marketing channels.*

### Overall Lead Performance

Leads YTD **5,595**   2019 Leads YTD **6,888**   Current Month **July**   Previous Month **1,473**

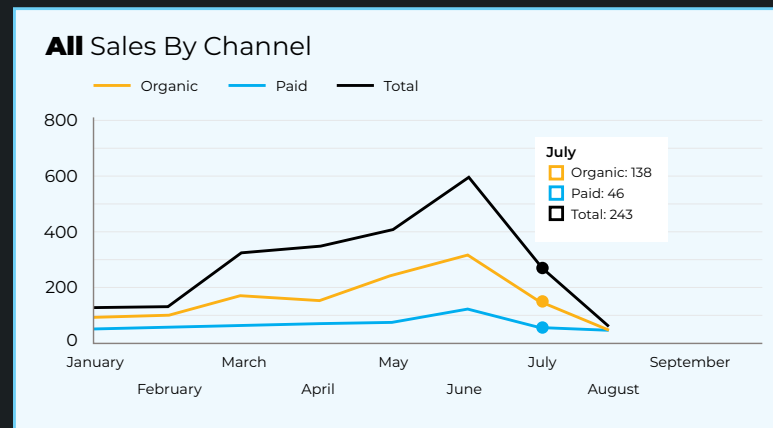


*We show clients in realtime how annual lead performance stacks up against the previous year's performance and the annual lead goal, giving you a consistent benchmark of progress.*

## How We Track it (Cont'd)

Leads are critical to sales, but sales are what get you to your growth goals - so don't stop tracking once the leads have come in! Once you've built a way to track incoming leads and marketing performance, you can work on building metrics to roll up sales performance, including:

- Total sales vs. goal
- Sales by channel (organic vs. paid)
- Cost per sale



*Tracking sales by channel can give you important information about lead quality and CPS.*

Don't forget - accurate sales data is critical to setting ambitious but attainable marketing performance goals, and it is key to running a profitable business.

### **CPS = CPL / Conversion Rate**

Once you determine your CPS, you can determine:

**Lead Performance** = Revenue Generated / Total Paid Leads

**Sales Performance** = Revenue Generated / Total Paid Sales

**Total Sales Needed** = Revenue Goal / Avg. Revenue Per Sale

**Marketing Budget Needed for Growth** = # of Sales X CPS

Looking for more information on how to calculate cost per sale and how that impacts your marketing budget?

[Check out our how-to video here.](#)



# What about Lost Leads?

The smartest business owners don't just track where their leads are coming from - they're also fanatical about collecting data on the leads that didn't close.

Tracking why a customer wasn't able to or chose not to do business with you can help your team identify if there are specific marketing channels or campaigns that are bringing in people from outside your service area or looking for services you don't offer.

Tracking customer cancellations takes it even further - giving you data over time that may identify trends in behavior.

Here are suggestions to help your CSRs determine and consistently rate lost leads or cancelled customers.

## Lead Closing Reasons

Reasons	Examples
COMPETITOR	<ol style="list-style-type: none"><li>1. Lead decided to go with another company</li><li>2. Homeowners association takes care of the service</li><li>3. They have decided to DIY a solution to their problem</li></ol>
DECEASED	<ol style="list-style-type: none"><li>1. The lead died</li></ol>
NO CONTACT	<ol style="list-style-type: none"><li>1. You are unable to contact the lead by phone or by email</li><li>2. You have made numerous attempts to contact the lead with no response</li></ol>
DUPLICATE	<ol style="list-style-type: none"><li>1. The lead is a duplicate</li><li>2. The lead is a junk lead</li></ol>
NO INTEREST	<ol style="list-style-type: none"><li>1. The lead has no interest in the service suggested</li><li>2. The lead only wanted a free inspection/quote</li></ol>
NO PROBLEM	<ol style="list-style-type: none"><li>1. The lead has no problem</li><li>2. The lead's problem has been resolved</li></ol>
PRICE	<ol style="list-style-type: none"><li>1. The service is too expensive compared to other companies</li><li>2. The service is out of the lead's budget</li></ol>
RESPONSE TIME	<ol style="list-style-type: none"><li>1. We did not respond to the lead's request soon enough</li><li>2. We were not able to get the customer on the schedule soon enough</li><li>3. By the time we contacted the customer they had gone with another company</li></ol>
NO SERVICE	<ol style="list-style-type: none"><li>1. The lead is requesting a service that we do not offer</li><li>2. We can't access the problem (requires use of a ladder, can't get in the crawlspace)</li><li>3. Lead is a renter and does not have authority to schedule service</li><li>4. The lead is out of our service area</li><li>5. The lead refuses to give us credit card info for monthly billing</li><li>6. The lead was a previous customer that we cancelled because they caused problems</li></ol>

# Next Steps

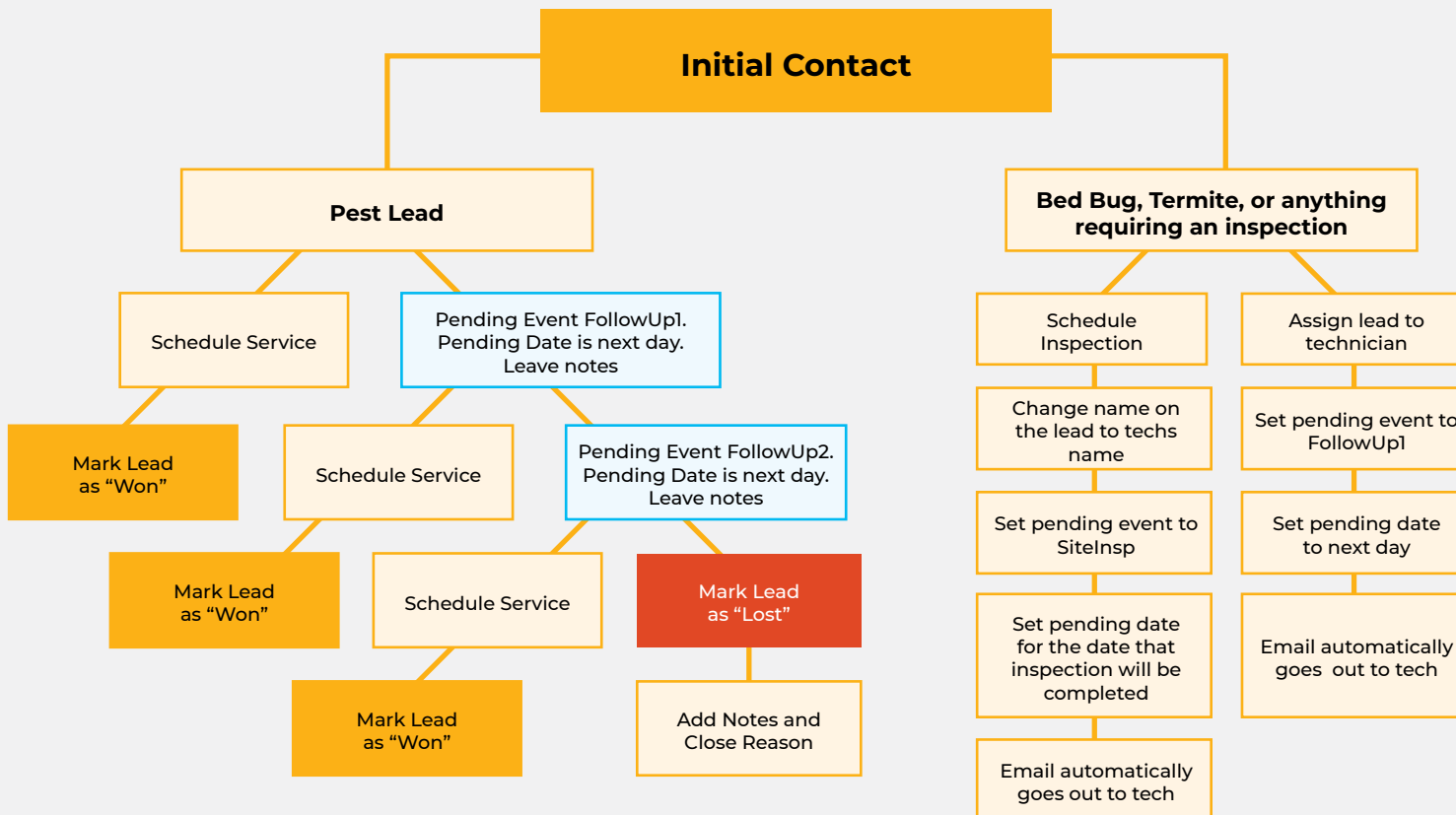
## Creative Lead Management:

If your digital marketing system is doing its job of attracting potential customers to contact you, your office will receive incoming creative leads.

This lead can turn into a sale for a particular service or package, but sometimes requires an inspection before service can be quoted or

performed - and then is passed on to the technician.

Here is a sample flow for management of a creative lead upon initial contact, before it can be considered a won deal.



# Close the Loop:

Get even more out of your data.

“Closing the loop” is a term that describes the joining of marketing and sales data, giving you a more complete picture of performance and revenue potential.

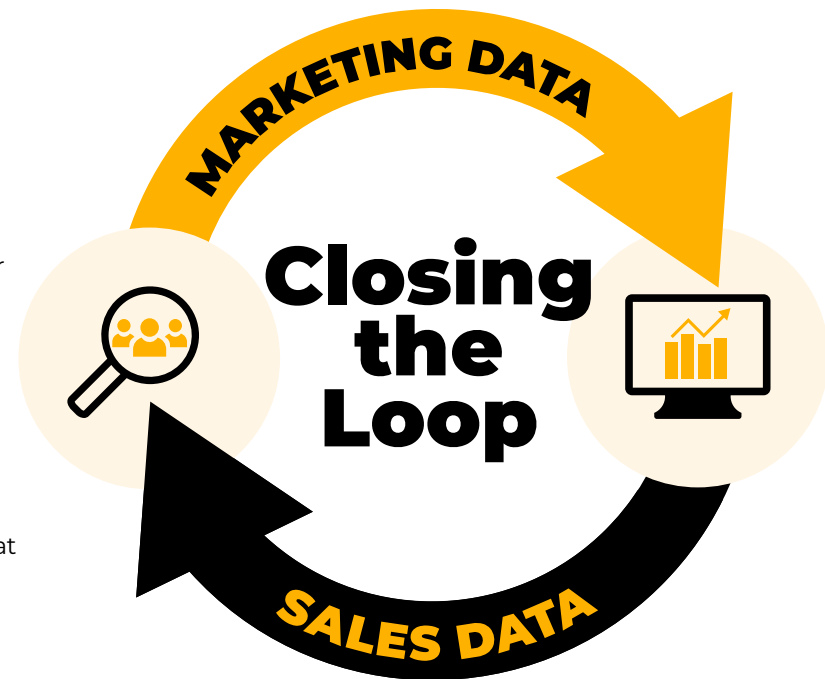
Instead of just tracking your leads back to the source, you can harness sales insights to make your marketing even more effective. Over time, you’ll uncover trends about how your marketing efforts contribute to the lifetime value of your customers.

## For example:

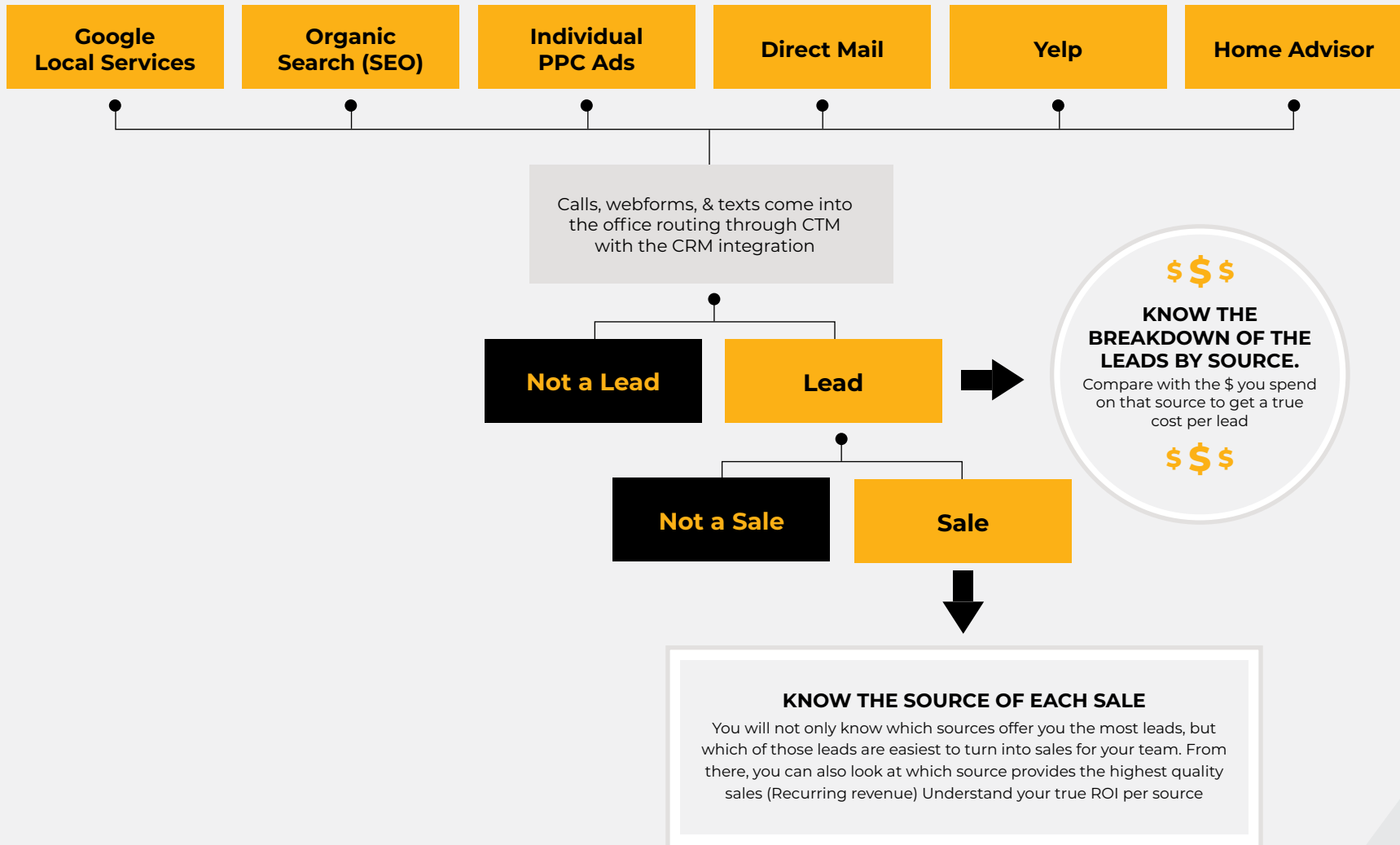
- If your lead tracking shows that Groupon leads have a 50% close rate, but closing the loop shows you that 50% of those customers cancel within the first 6 months, you’ll have greater insight into the true value of that channel and be able to determine how much you’re willing to pay for those leads moving forward.
- You may notice that leads that come from Local Services by Google campaigns are 25% more likely to sign up for a recurring service package than leads from other channels. That recurring revenue might be worth an increase in your CPL for the channel to show your ad more frequently.

When you’re able to connect your CRM data with your lead tracking data, you can make powerful, data-backed marketing decisions to drive success for your business.

[Interested in learning more about closing the loop? Coalmatch can help with that, too!](#)



# Closed Loop Marketing:



# It Ends With You:

It's time for you to take your marketing and sales performance to the next level. After all - The real function of lead tracking is collecting data about marketing that's working, so you can do more of it!

## **We recommend starting out by:**

1. Defining and implementing a clear definition of a lead for your business.
2. Examining the existing system you're using to track leads. What tools are in play? Are you using spreadsheets? Is data housed in different documents or platforms? Are you using call tracking tools or analytics systems to collect lead source info?
3. Can these tools work together to give you the insights you need?
4. Creating a timeline to set up the appropriate infrastructure and processes to consistently track every lead that comes your way.

Remember, this is a process. Developing a system that works for you – something you know you can keep up with and is realistic for your business – may take awhile.

**Need a hand setting up your lead tracking system ... or just need more leads to track?**

## **THAT'S OUR JOB!**

Visit us at [coalmarch.com](https://coalmarch.com) - or reach out to us [sales@coalmarch.com](mailto:sales@coalmarch.com) to learn more about how our digital marketing platform is providing real data and real results to leaders in the pest and lawn industries.

Cheers!

The Coalmarch Team