Intro to CallTrackingMetrics: Part 1
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COURSE REQUIREMENTS

COMPUTER RECOMMENDATION

- Log into your CallTrackingMetrics account
- If you have two monitors, you can show our screen on one and your CTM account on another
- Supported browsers: The latest version of Google Chrome or Firefox
- Have pop-ups enabled

ZOOM SETUP

- For audio issues, call in via phone line
- Attendees are in listen-only mode
- Enter questions in the Questions Box
- Questions will be addressed throughout the course
- Missed questions will receive a follow-up email response

GETTING STARTED
ACCOUNT ASSUMPTIONS

Create an account or subaccount to work in.

New to CTM?

Visit: https://www.calltrackingmetrics.com/plans now and sign up if you are not yet a customer.

Current Customer?

Log into your CTM account.
If you are an agency administrator, visit https://app.calltrackingmetrics.com/accounts/new and create a new sub-account “Academy” for this training class to work in.

Have Agency or Administration access with the ability to purchase tracking numbers.
PART ONE: INTRO TO CTM

SECTION 1
- Tracking Code
- Tracking Numbers
- Receiving Numbers
- Target Numbers
- Tracking Sources

SECTION 2
- Buying Numbers
- Porting Numbers
- Vanity Numbers
- Working Session
- DNI Swapping
- Working Session - Let’s put it all together and build something!
- Resources

AGENDA
HELLO!

I’m Jessica Michaels
Google Guru & Product Coach
SECTION ONE: CORE CONCEPTS
Core Concepts

A good way to think of the core concepts is like the puzzle pieces needed to configure your calltrackingmetrics account. Like putting together a puzzle, isn’t not necessarily the order in which you put it together that matters, what matters is that all the pieces are lined up and connected.
Tracking Numbers
Tracking Numbers

Tracking Numbers are most commonly used to track and attribute activities such as phone calls, text messages, form submission and online chats to individual marketing campaigns but are also assigned to individuals as personal or direct lines.
How Many Tracking Numbers do I Need?

In order to determine how many tracking numbers you need to accurately track and attribute your ctm activities (Calls, Text, Forms and Chats).

First, You’ll need a quick lesson on Tracking Sources. Tracking numbers are assigned to tracking sources and there are two types of tracking sources, offline and onsite.
OFFSITE TRACKING SOURCES

These sources include TV, Print, Radio, Billboards and flyers.

For each advertising channel you can use 1 Tracking Number. For example, you can assign a tracking number to a specific billboard or a tracking number to a specific ad that airs on a particular radio station.

An easy way to think about offline sources is anywhere that’s not on your website, so even places like social media and online listings like Yelp are offline sources.

EXAMPLE:

John Doe has one Radio ad and one print ad. He buys and assigns one tracking number for Radio ads and one tracking number for his print ad.
These sources include onsite advertising channels such as Google Ads, Google Organic, Bing Organic, Facebook, Facebook Paid, AdRoll, Email Marketing etc.

These sources are where the tracking number will dynamically appear on your website when a visitor accesses it through an onsite source.

For onsite tracking we recommend 1 tracking number for every 20 daily visitors to your website from each individual source.

Example:

Jane Doe averages 2,000 daily visitors to her website via Google Ads ads and an additional 400 visitors to her webpage through links in email campaigns. She buys and assigns 100 tracking numbers for Google Adwords ads and 20 tracking numbers for her email campaigns.
Likelihood scores refer to how confident we are that a particular website visitor made each phone call. We recommend the guidelines for online sources to have as close to 100% accuracy as possible.
You’re a marketing professional looking to add call tracking to your marketing tool kit. To get started you need to determine what advertising channels you want to track and then determine how many Tracking Number will you need to purchase for both your offline and online advertising channels.

You and your team determine that you want to track the following advertising channels:
### Advertising Channels

<table>
<thead>
<tr>
<th>ADVERTISING CHANNEL</th>
<th>Average Daily Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed Flyers</td>
<td></td>
</tr>
<tr>
<td>Radio Ads</td>
<td></td>
</tr>
<tr>
<td>Google Organic</td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
</tr>
<tr>
<td>Billboards</td>
<td></td>
</tr>
<tr>
<td>TV Ads</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADVERTISING CHANNEL</th>
<th>Average Daily Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Ads</td>
<td>5,000</td>
</tr>
<tr>
<td>Microsoft Ads</td>
<td>550</td>
</tr>
<tr>
<td>Facebook Ads</td>
<td>1,500</td>
</tr>
<tr>
<td>Website</td>
<td>10,000</td>
</tr>
<tr>
<td>Google Organic</td>
<td>4,000</td>
</tr>
<tr>
<td>Facebook</td>
<td>3,400</td>
</tr>
</tbody>
</table>
Target Numbers
Target Numbers

Target numbers are the phone numbers on your website that can be dynamically swapped to a tracking number. If you want to be able to replace multiple numbers on your website, you will need to add a target number for each phone number on your site.
Two types of Target Numbers

PHONE MATCH

Phone Match: this target number type will look for the number you enter, and should be able to read that number in any common format, like the following:

- 555-123-4567
- (555) 123-4567
- 555.123.4567
- 555 123 4567

EXACT MATCH

Exact Match: this target number type will look for the exact string that you enter in the field. If you have a vanity number you need to replace, like 555-123-CARS, you will need to use an exact match target number.
Tracking Sources
Tracking sources are the marketing channel that the tracking numbers will be attributed too. In some cases tracking sources are used for non-marketing attribution purposes like personal lines.
Onsite Call Tracking
Preset Tracking Sources

We have many commonly used tracking sources already pre-configured for you, such as Google Organic, Ads, Bing Paid, Facebook, etc. These sources are configured to look for either a referring or landing URL pattern so that we can identify that type of visitor and show them a specific tracking number.

Custom Tracking Sources

If you find that the source you want to track does not already exist in CTM, then you will need to create a new custom source. Tracking sources have three main components:

1. Name
2. Source type: On- or off-site
3. Source trigger (referring or landing URL pattern)
Two types of Tracking Sources

**Onsite**
ONSITE tracking source are used for tracking numbers that will be dynamically appearing on your website when visitors come to your site from the source you are setting up.

**Offsite**
OFFSITE tracking source are used when no number swapping will occur. Examples would be a number hard coded on your website or ad campaigns on TV, radio or print where the number is static. (Offsite is the default settings when creating a custom source)
Tracking Source Conditions

If you choose Onsite as the type, you will then need to tell the system how to identify visitors from this source; either through information in the Referring URL field or the Landing URL of those visitors. In general, you want to identify a source using landing URL when you control the ad destination URL (i.e. in most online advertising situations). You would use referring URL when you do not control the URL that your visitors are coming in on.
In order to prevent overlapping rules the tracking source position will determine the order the sources are prioritized. The lower the number, the higher the priority.
Position Examples

**GOOGLE ADS**
An online source, configured to look for the landing page URL pattern of: gclid=.* and the position is 1.

**GOOGLE ORGANIC**
An online source, configured to look for the referring page of Google's SERP, which uses regular expression and looks like this:

```regex
(google.([^-/]{2,3})|google.com?.([^-/]{2}))
```
and the position is 3.
Tracking Source Attribution Models

**FIRST TOUCH**
Report on the original way the caller came to the website.

**LAST TOUCH**
Report on the most recent referring or landing page source that the caller came through.
Routing Options
(Flows)
Routing Options

- Receiving Numbers
- Voice Menus
- Call Queues
- The Softphone
- Smart Routers
Explore Numbers

(Numbers > Tracking Numbers)
Formatting and labeling purchased numbers

(Numbers > Target Numbers)
Formatting target numbers: exact match, and phone match.

(Numbers > Tracking Sources)
Tracking sources

(Numbers > Receiving Numbers)
Dialing extensions, adding schedules, and no answer routing on receiving numbers
The tracking code is the script that sits on your website that tracks the visitors to your website and swaps the phone number to a tracking number. It watches where people are coming from, matches them to advertising sources you are tracking in your CTM account.
WHAT IT IS

What does it do?
- The tracking code looks for the target number indicated and changes it to a tracking number if a visitor is coming through one of your sources
- It collects data about your visitors and stores for reporting

Where is it located?
- Numbers > Tracking Code

What does it look like?
- `<script async src="/91251.tctm.co/t.js"></script>`
- Each account/sub-account has its own unique code

Where does it go in the web page?
- After the `<head>` tag on each of your web pages
- The code should go on all pages of your site
HOW WE USE IT

COOKIES
- By default the tracking code remembers the history of the visitor for 30 days
- You can adjust this here: Numbers > Tracking Code

IMAGES
- The code cannot change phone numbers in images
- Instructions for custom coding to give your developer to handle swapping images on your site with tracking numbers

MATCH TYPE
- Phone match vs. exact match
- Exact match only needs to be used for special formats

FIRST TOUCH vs. LAST TOUCH SOURCES
- Last touch sources will override any previous sources associated to a visitor.
SECTION TWO: PORTING
Porting Numbers
Guide to Porting Numbers

CallTrackingMetrics

CallTrackingMetrics
CONFIGURING PORTED NUMBERS

- Porting existing numbers (Numbers > Port Numbers > Port New Numbers)
- Buying numbers (Numbers > Buy Numbers)
- How to search by country, local, toll free, etc.
- Defining “vanity numbers”
- How to place special orders on numbers, or vanity numbers that are “out of stock” (Numbers > Buy Numbers > Request a Number)
CORE CONCEPTS QUIZ
SECTION THREE: WORKING SESSION
Working Session

- Receiving Number
- Target Number
- Tracking Sources
- Install the Tracking Code
- Buy Tracking Numbers
QUESTIONS?
Thank you!