90% of Marketers Don't Follow UTM Management Best-Practices
And It's Costing Them Millions Each Year

A Best Practices Guide to Good UTM Structure -
How to Structure, Create, Store, and Track the Performance of UTM Links Across
Multiple Channels to Understand Which Campaigns Work Best

June 2019

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INTRODUCTION

It's a common question: Which paid ad performed best, and why?

Marketers face this question every day and it's important to know with certainty what your answer is. Nonetheless, marketers (from Fortune 100 companies to specialist digital agencies) struggle to get to a concise answer. Why is this the case? The reason might shock you: it's because 90% of marketers don't have the right infrastructure to answer that question. And without the right infrastructure that supports data accuracy and best-practice tracking methodologies marketers will never be able to confidently say: Ad A over Ad X.

Factivate interviewed over 500 participants to understand the scope of their Campaign Management structure to find out why answering this basic question was so difficult. Participants ranged from Fortune 500 marketers to boutique digital agencies to help us understand if either a company type or a management position type were more pre-disposed to answer the question with a high level of confidence.

When posed with questions about their infrastructure, i.e., how are you managing your UTM campaigns, 90% of the respondents identified using a UTM builder to generate a link but had no enforceable structure or foundation to building the links, storing the UTM parameters, or even compiling and tracking their data across their paid media channels UTM performance analysis.

This white paper explores the digital marketing processes that are available to understand which campaigns work and which don't work. It defines UTM tags (or Campaign links) to give you an understanding of their importance in marketing analytics. It explain how the campaign link building and analysis process has become so fragmented and broken that it is almost impossible to arrive to a good conclusion. Lastly, it will show you how to overcome these obstacles using some of the available software solutions so that you can measure a campaign (or link's) performance in a contextual manner (and not just report on clicks)

By the end of the paper, should you implement our recommendations, you will feel comfortable telling your team: "We need to look beyond Facebook to analyze an ad's success. No longer are we going to consider Facebook clicks as a measure of success. Instead, when we realize that the Ad had a bounce rate of 95% and a time on site of less than 20 seconds, we're going to consider it a failure."

If you are determined to maximize your digital marketing ROI by gaining better control of your link to engagement customer journey, please read on.

What is a UTM Link in Digital Marketing

When a visitor comes into a site that has an Analytics tracking code installed (let's assume it's Google Analytics in this case), Google is able to capture information via data cookies: i.e., where do they come from (source), what path they used to get here (organic, referral), did they come from a campaign, what Ad set belonged to the campaign, etc… UTM Link are used to overwrite the default generic information put in by Google Analytics with your own custom information so that you can be specific with what Google should report.

Users can set up campaigns using "query parameters" that you add to links in your paid or unpaid marketing campaigns. When you do this correctly, Google Analytics will display when traffic comes to your site via these specific links.

UTM Links append these parameters to your URL so that you can track the traffic from that particular source. These "tracking" URLs are essential to correctly calculate the customer engagement within your site (impressions, visits, time on site, bounce rate, demographics, etc) from your marketing campaigns.

They make your links look like below:

> http://factivate.com/?utm_source=Whitepaper&utm_medium=link&utm_campaign=WhyUTMs

Why do we need to use UTM links?
There are plenty of resources you want to use UTM links for. These include:
- UTM Link building/tagging consolidates all campaign data in a set of campaign reports. With these reports, you can often find real insights when you break down the data by segments.
- If you're running paid search campaigns outside of Adwords, these visits can also show up as organic or referrals if you don't use UTM links (and give you a massive migraine).
- If you're running campaigns on social sites, Analytics will also display this as referral traffic.
- If you're running a campaign via a social site, their Pixel-tracked "conversions" might be considered different from your Analytics definition of "conversions" or leads. This can skew your data drastically.

If you're running email campaigns, campaign UTM links are critical. This is because traffic from email will be grossly under-reported if you don't tag all links pointing back to your site. There are three primary causes for this:
- Visits from desktop email clients (ie Outlook) will show up in analytics as "direct" or medium = "(none)"
- Visits from webmail providers (such as Gmail) don't pass referrer data.
- Visits from mobile show up as "direct" because of restrictions in passing referrer data.

Suffice it to say that when you're analyzing traffic in some way, you want to make sure you track everything correctly. This helps you accurately prove the value you're providing as a marketer and optimize all of your campaigns using a common analytics language.

The Costliest Problem to Digital Marketing Insights:
IT'S ALL ABOUT THE UTM LINK

The only way for marketers to run more successful campaigns is to know which ads work and which ads aren't working. In a world with millions of dollars being spent on ad technologies, you would think it's simple to figure out which ads are working/not working. But it's not.

While every marketer is capable of reading about their ad's success on a per platform level (i.e., "I know my Facebook ad generated 10,000 clicks so it performed best"), **90% of survey respondents were unable to draw insights from their ads throughout the customer's journey (**i.e., "the aforementioned Facebook ad has a time on page of 20 seconds and a bounce rate of 95%. It's probably my worst ad in the campaign"). Why is this happening?

We surveyed over 500 digital marketers to tell us how confident they felt in determining which ads worked best in the last two weeks. Our sample size ranged from marketers working for companies with more than 5,000 employees to smaller companies of less than 25 (from CMOs to Analysts). Here's the unfortunate circumstance: less than 10% of marketers displayed a level of high confidence in knowing which ads were working and which ads they needed to stop.

Consequently, we realized that the processes and structures used to analyze their data had a direct correlation on their level of confidence in their insights. And, it all stemmed from bad UTM processes.

> **90% of our survey respondents said that they had no enforceable structure in how their teams build, store, and draw insights from their UTM links**

In fact, we were surprised that 90% of our survey respondents said that they had no enforceable structure in how their teams build, store, and draw insights from their UTM links.

The top reasons why this happens:

"There are too many people building UTM links in different ways. This makes all our data suspect when we analyze it in GA".

Enforcing naming conventions is critical to cleaning up and getting good insights. Marketers that do not do this correctly put their team and organization at risk of :

1. Bad Data Accuracy
2. Making Marketing Data Analysis nearly impossible.

Without an enforceable naming convention, your team is now open to the preferences by all stakeholders in how they build the links. Consequently, one user can write a Campaign Source as FB while another writes it as "facebook", Google Analytics will identify these as two different sources and make your data analysis even harder.

In some cases, this lack of control even manifested itself with companies even using the source naming conventions for MEDIUM; further complicating analysis.

In this image, we see the number of ways the company identified Facebook as a Medium even after identifying it as a Source, leading to further confusion in trying to analyze the traffic from their paid Facebook links.

With these kinds of problems being common, marketers cannot trust their Analytics reporting and will have to ignore their Google Analytics and instead go into their media channels to try to answer the question: which ads performed best? The problem with this approach is that it provides an incomplete picture of the link's performance and can lead to some very wrong conclusions; further risking your marketing effectiveness.

"It takes too much time effort to store and pull of the analytics data together into one place even if we understand how valuable it can be".

Of the people who tried to enforce a UTM naming structure, they built a highly manual process like the sheet below:

Figure 1: UTM Library in Excel

During the last 5 years, we've seen a wide number of these spreadsheets pop up because they "FIX" the naming convention problem. Here are a few of the ones we've tried over the years and then abandoned:

Amazee Metrics	URL Builder Spreadsheet
Link to Sheets	URL Builder Spreadsheet
Hallam Internet	URL Builder Spreadsheet
Cardinal Path	URL Builder Spreadsheet
Hollini	URL Builder Spreadsheet
AnnieLytics	URL Builder Spreadsheet

THE PROBLEM WITH URL Builder Spreadsheets: Even when Sr. Marketers forced their stakeholders to use this document, other team members (whether it was the agency or different managers) would inadvertently forget to "add a new line" or go into the document altogether. Then, they would then have to try to match links that weren't in the document with those reported by GA. This process also does not scale. As you build more and more links from which you then try to track their performance, you will quickly abandon your spreadsheet and search for something better because it's too complex, error-prone, and unreliable.

"It takes too much time and it's too complex to bring together all of that data into one place."

Of the participants who admitted to trying to compile their marketing data on a per link basis who spent more than $3,000 per month on digital ads, they said it would cost them anywhere from 40 to 60 hours of manual work to pull together the KPI performance metrics from their paid media channels and then match them with their Google Analytics data.

Consequently, these same marketers decided that it was simpler to just take the KPIs from one platform to make a decision and "hope" they're doing the right thing. Unfortunately, they then go back to relying on a siloed approach to their marketing analytics.

This "UTM link" problem cost marketers millions of dollars in bad ads and missed opportunities in 2018. For one of our survey companies alone, this issue cost them over $200,000 in bad ad spend. Standard UTM management practices need to be implemented by digital marketers or this will continue to be a problem plaguing the industry.

> **UTM Link best practices need to be enforced. If marketing teams cannot enforce a naming convention for link uniformity, they will never be able to draw the appropriate insights necessary to determine which campaign works best. It doesn't stop there though. Marketers need an automated process to store and measure the performance of their UTM links in a contextual manner or the analysis will be biased to the platform in which the link was launched.**

Best Tools for UTM Management
Automatically Build, Store and Track Your UTM Activities

Up until now, the process to build, store, and track UTMs has required a significant manual effort. Best practices now suggest that most of this process needs to be automated to reduce the number of errors and improve the insights for each marketing team. This is why we've put together a number of different tools that we've tested to help you automatically build and track the performance of your UTM campaign links. Below is a summary of these platforms and our takes on each one.

Factivate **Smart UTM Manager**

- **UTM Builder:** YES
- **UTM Storage:** YES
- **UTM Performance Tracker:** YES (with Advanced Insights that scale beyond UTM tracking)

This UTM link builder/ manager is the mother of all UTM managers as it combines smart UTM builder capabilities with Business Intelligence value all into one. Company users include marketers from organizations like Proctor & Gamble and Merck just to name a few.

PROS: The Smart UTM's Smart Manager's focus on helping marketers gain good insights is clearly helping teams evolve into marketing analytics 3.0 teams.

They start off with custom-building every UTM Builder per client. This means that they work on a personal level with each company to ensure that clients receive a client-branded UTM form that conforms to their naming conventions and practices. Each client also gets a custom URL to share with their entire team and their respective agencies. Users, scalability, personalized campaign alerts, and a host of additional features make this a great UTM management alternative but **Factivate's Smart UTM Manager really shines in the UTM performance tracking (or insights).**

The Smart UTM Manager provides contextual views of the Campaign Link's performance (thus providing real UTM KPI performance tracking). This functionality is unlike any other UTM Builder tool available.

> **The ability to understand an Ad's KPIs in the paid media platform (ie Facebook) and then gain insights of the entire click-journey (from Facebook relevance score to Analytics Time on Page) has already saved our team thousands of dollars in potentially bad decisions that we would have taken when we had focused on a clicks only measurement.**

The Executive Dashboard and Analyst views further provide really valuable insights into your ad's segmentation on a per-platform basis that you can't even get with some of the most popular dashboards in the marketplace.

INSIGHTS								
You published 287 UTM links this period. Compared to 387 UTM links published last month.	**TOP PERFORMING CAMPAIGNS**							
	TOP 15 BEST UTM CAMPAIGNS (By Entrances high-low) THIS PERIOD							
	CAMPAIGN NAME	CAMPAIGN STATUS	PAID LINK CLICKS	ENTRANCES	BOUNCE RATE	AVG CTR	GOAL COMPLETIONS	TOTAL SPEND
	BluthWorldCup	GOOD	2,015.00	1,773.20	28.00%	1.82%	32.27	$2,256.80
There were 29 Ads launched in Facebook and 27 UTM links created using your form. Check ASAP that your team changes the links for the Ads: BlueTech_button, and BlueTech_image	SummerClearance2019	DANGER	1,889.00	1,662.32	95.00%	2.00%	33.25	$2,153.46
	Mywaydeals	OK	1,193.00	1,049.84	44.90%	0.29%	3.01	$1,300.37
	Bluthsruletheworld	GOOD	1,982.00	1,744.16	28.00%	3.00%	52.32	$2,457.68
	SummerCampSales	GOOD	1,615.00	1,421.20	19.00%	4.40%	62.53	$1,582.70
	SummerSolsticeCamp	GOOD	1,102.00	969.76	29.33%	6.80%	65.94	$1,102.00
You're mis-spending money on sub optimal campaigns totaling $5998.11 This is equal to 26% of your spend. See below for recommended areas for improvement.	JoiningForces	OK	1,008.00	887.04	61.00%	1.90%	16.85	$1,008.00
	JoiningForcesBtest	OK	996.00	876.48	66.00%	2.10%	18.41	$1,444.20
	JoiningForcesNorth	OK	863.00	759.44	69.00%	2.50%	18.99	$1,311.76
	JoiningForcesSouth	DANGER	597.00	525.36	88.00%	1.10%	5.78	$883.56
	WhowillYouBe	OK	487.00	428.56	55.00%	1.99%	8.53	$993.48
	BucketListEnds	OK	337.00	296.56	59.00%	0.19%	0.55	$370.70
	BucketListBeginnings	GOOD	229.00	201.52	30.00%	4.90%	9.87	$299.99
	Bringingittoyou	DANGER	111.00	97.68	79.00%	3.70%	3.61	$160.95
	July4thpresales	GOOD	98.00	86.24	29.12%	2.10%	1.81	$120.54
			14,522.00	12,779.36	52.02%	2.59%	333.74	$17,446.1!
	Total of ALL UTM Activities		92.00%	81.00%	82.81%	80.00%	61.92%	75.83%

OPTIMIZATION OPPORTUNITIES				
CONSIDER YOUR FACEBOOK ADS SEGMENTS	ARE MY FACEBOOK CAMPAIGNS RELEVANT?	ARE MY INSTAGRAM CAMPAIGNS RELEVANT?	AM I SPENDING MONEY ON 3rd PAGE RESULT!	
Your Facebook / Instagram Demographic with the highest CTR:	ATTENTION! You've wasted $2,894.75	ATTENTION! You've wasted $1,498.44	ATTENTION! You're spending $876.47	

The fact that you can also add your own benchmarking to track the performance of the ad is our favorite feature and truly makes this the best UTM performance tracking tool out there (see below).

Scorecard Benchmarks
Per Platform

Facebook Platform	🔴	⚠️	💚
Targetting Benchmarks	Danger (less than)	OK	Good (more than)
Relevance Score	3		6
Likes / Ad	18.00		50.00
Shares / Ad	10.00		20.00
Comments / Ad	7.00		15.00
CTR	2.00%		4.00%
Conversion Funnel	Danger (more than)	OK	Good (less than)
Bounce Rate	70.00%		50.00%
$ / Link Click	$2.50		$1.50
Avg. Daily Spend	$200.00		$100.00

Instagram	🔴	⚠️	💚
Targetting Benchmarks	Danger (less than)	OK	Good (more than)
Relevance Score	3		6
Likes / Ad	18.00		50.00
Shares / Ad	10.00		20.00
Comments / Ad	7.00		15.00
CTR	2.00%		4.00%
Conversion Funnel	Danger (more than)	OK	Good (less than)
Bounce Rate	70.00%		50.00%
$ / Link Click	$2.50		$1.50
Avg. Daily Spend	$200.00		$100.00

Google Adwords			
	Danger (more than)	OK	Good (less than)
Avg Page Position	21		8
$ / Link Click	$1.20		$1.50

CONS: There are a lot of insights available with this Smart UTM Manager and they provide a breakdown of demographic insights as well to help you improve your marketing efficiency. This will require a little patience to go through but within an hour, you will begin to see the incredible value in those insights.

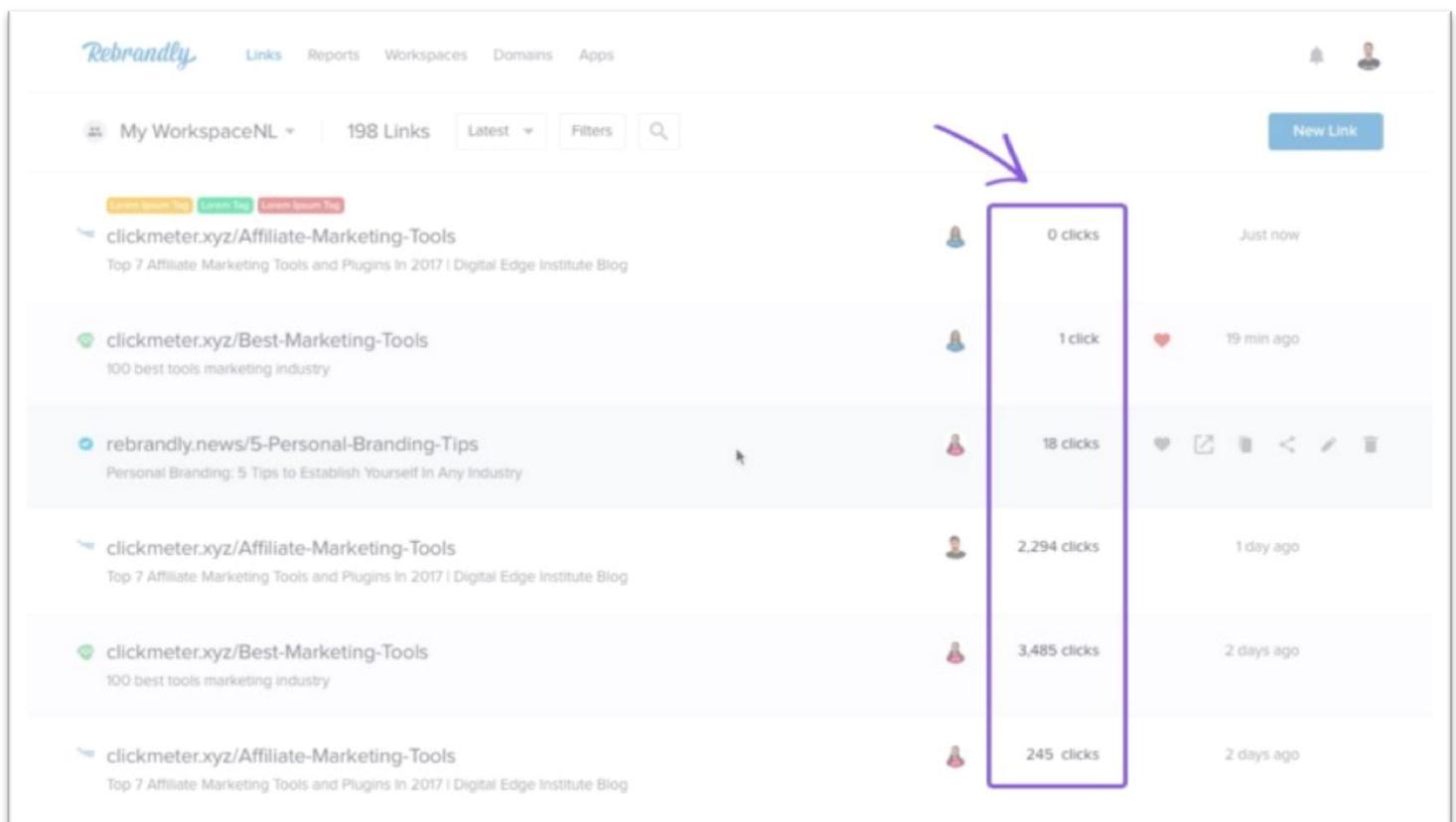**For more information on the Factivate Smart Manager platform, please go to the next section.**

Rebrandly:

- **UTM Builder**: YES
- **UTM Storage**: YES
- **UTM Performance Tracker**: NO (provide click stats only)

Rebrandly provides a URL shortener with custom domains. We've seen lots of companies use this platform because branded domains are important to them when they share a short link.

PROS: URL builder provides custom domains. The ability to enforce naming conventions and build teams around UTM building practices is solid.

CONS: While their list of features is expansive, their focus on analytics does not extend beyond Clicks. This is why we don't like to recommend this tool. Clicks only offer a small window into the Ad's performance and that window can skew your results by quite a bit.

Excel UTM Builder Template

Like many digital marketers, we've seen lots of UTM builders built in Excel and already mentioned some of these in the initial sections of this white paper. In these templates, we've used CONCATENATE and SUBSTITUTE function to stitch together the URL with five UTM values. There's also Data Validation to create dropdowns for picking the values that are prepared in advance and allow for data accuracy when you track them in GA.

- **UTM Builder**: YES
- **UTM Storage**: YES
- **UTM Performance Tracker**: NO

Pros: It's free to use and many are familiar with spreadsheets…so no learning curve.

Cons: the spreadsheet can quickly grow to thousands of rows of links and becomes difficult to manage. Many users accessing it and changing it can become a challenge if real-time collaboration isn't set up. The biggest problem is that this is horrible for performance tracking and probably the biggest reason why this won't scale with your marketing efforts.

CampaignTrackly

- **UTM Builder**: YES
- **UTM Storage**: YES
- **UTM Performance Tracker**: Basic (GA integration)

CampaignTrackly is another UTM builder that centralizes your storing and tagging of links and adds a little Analytics mix to help you sort out your link's customer journey when they get to your website.

PROS: Apart from the ability to apply naming conventions and store your UTM links, I like that they can tag a wide number of links very quickly instead of having to build one link at a time. They also shorten your links with Bitly if you're a fan of that platform.

CONS: While it's nice that they integrate their click stats with Google Analytics, it's still not great UTM performance tracking. It's actually pretty elementary when it comes to data analysis (even though it's better than many other UTM builder's analytics I have to admit). I'd love to not just understand the end of the click-stream but analyze the performance on a per platform level. For example, I'd love to combine what happened

on Instagram with what happened in Google Analytics. Otherwise, there's no need for me to even look at their analytics page since GA already offers me those views.
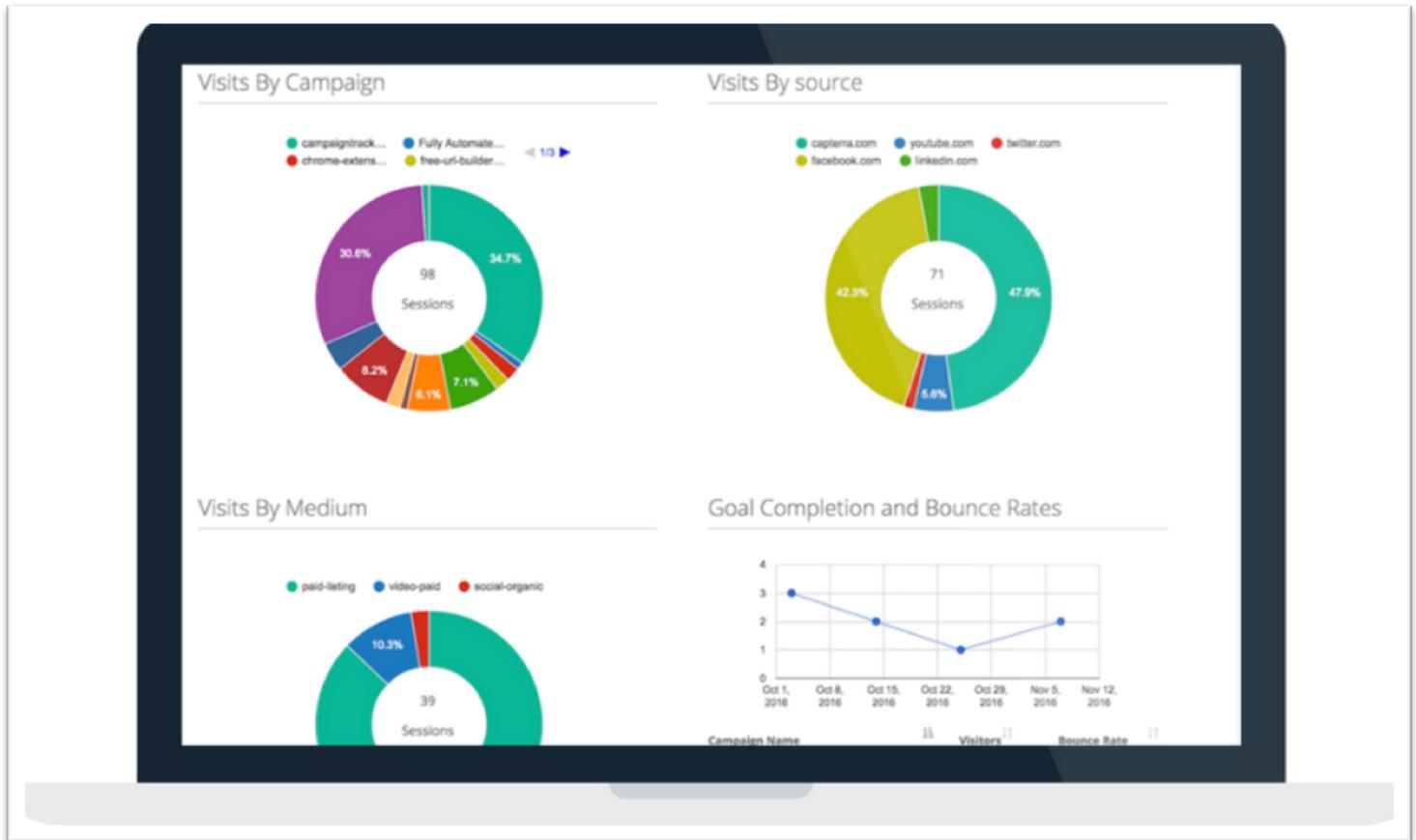
TerminusApp

- **UTM Builder:** YES
- **UTM Storage:** YES
- **UTM Performance Tracker:** NO (provide only click data)

Terminus is another URL builder that helps companies enforce naming conventions. They address the issues with data accuracy through their UTM builder's flexibility.

PROS: They provide some really good team collaboration features. You can determine which people can build links based on the campaign. Their UTM management and enforcement of naming conventions are also very flexible for DIYers.

CONS: Their analytics are focused on clicks only. That's a big problem when trying to determine where to invest your money. I used terminus for a few weeks and had to go back to each platform to determine the link's performance. This was a costly problem that was not solved by Terminus.

While there are lots of UTM builders in the marketplace, from Google's URL Campaign Builder to some of the ones we mentioned in this article, you'd be doing yourself and your organization a disservice if you don't consider the performance tracking components of your UTMs. If you find a tool that you like, make sure that the reporting extends beyond just one platform or beyond clicks. That will help you save thousands of dollars in the long run and have a better ROI focus.

If you're interested in learning more about Factivate's Smart UTM manager, please read on.

How the Factivate Smart UTM Manager Works

STEP 1:
USE A BRANDED UTM BUILDER THAT ENFORCES YOUR NAMING CONVENTIONS

By using a custom-branded form, you can establish and enforce naming conventions for anyone creating a UTM link for your brand. The Factivate UTM Builder form is custom-built for your naming conventions to make sure you have good foundations for your analysis later on.

Figure 3: Control how Source and Medium parameters with drop down functionality


Figure 4: autofill dropdown ensures names are written the same way for content, term, or campaigns

STEP 2:

AS A LINK IS CREATED, ENSURE YOU STORE IT IN A CENTRAL DATABASE (THAT CAN'T BE EDITED) FOR HISTORICAL RECORD-KEEPING

If you're using Factivate's UTM Builder, the second you click on the GET UTM LINK button, the created link and parameters are stored in your company's UTM Library. This library essentially replaces the need for you to ever store your links in an Excel document.
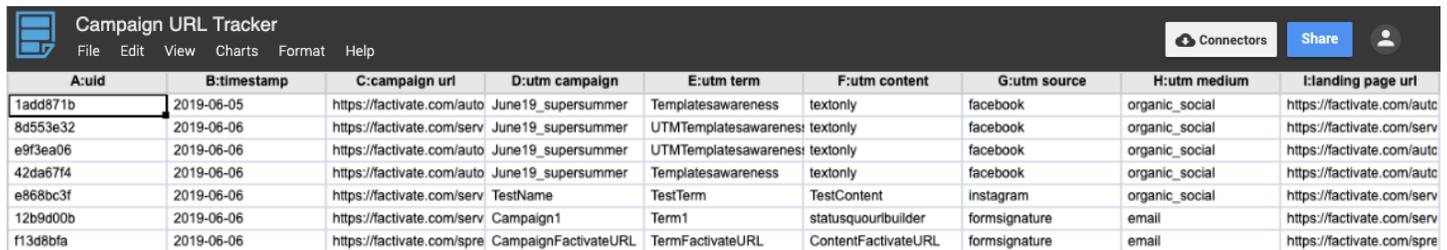
A:uid	B:timestamp	C:campaign url	D:utm campaign	E:utm term	F:utm content	G:utm source	H:utm medium	I:landing page url
1add871b	2019-06-05	https://factivate.com/auto	June19_supersummer	Templatesawareness	textonly	facebook	organic_social	https://factivate.com/auto
8d553e32	2019-06-06	https://factivate.com/serv	June19_supersummer	UTMTemplatesawareness	textonly	facebook	organic_social	https://factivate.com/serv
e9f3ea06	2019-06-06	https://factivate.com/auto	June19_supersummer	UTMTemplatesawareness	textonly	facebook	organic_social	https://factivate.com/auto
42da67f4	2019-06-06	https://factivate.com/auto	June19_supersummer	Templatesawareness	textonly	facebook	organic_social	https://factivate.com/auto
e868bc3f	2019-06-06	https://factivate.com/serv	TestName	TestTerm	TestContent	instagram	organic_social	https://factivate.com/serv
12b9d00b	2019-06-06	https://factivate.com/serv	Campaign1	Term1	statusquourlbuilder	formsignature	email	https://factivate.com/serv
f13d8bfa	2019-06-06	https://factivate.com/spre	CampaignFactivateURL	TermFactivateURL	ContentFactivateURL	formsignature	email	https://factivate.com/spre

Figure 5: the UTM Library that automatically stores your link parameters when using the Factivate UTM Builder

With your library automatically collecting each link as they are created, you can further ensure that people continue to use your UTM builder and not mess your data structure. Factivate can even do this for you. So if you only have 2 links created in your Library but Facebook says there were 4 new ads published, you can address the problem right away before your data gets messy.

STEP 3:
AUTOMATE YOUR 'DATA IMPORT' PROCESSES AND GET REAL-TIME, CONTEXTUAL INSIGHTS PER LINK IN ONE PLACE

As you get your foundations set up, data insights are merely a short step away if you use Factivate.

Since the platform is capable of automatically pulling information from your digital channels (ie Facebook, Instagram, Google Analytics), you can start seeing insights per ad in real time. Now, any marketer is capable of answering "which ad performed best/worst" by getting the complete picture (see below).
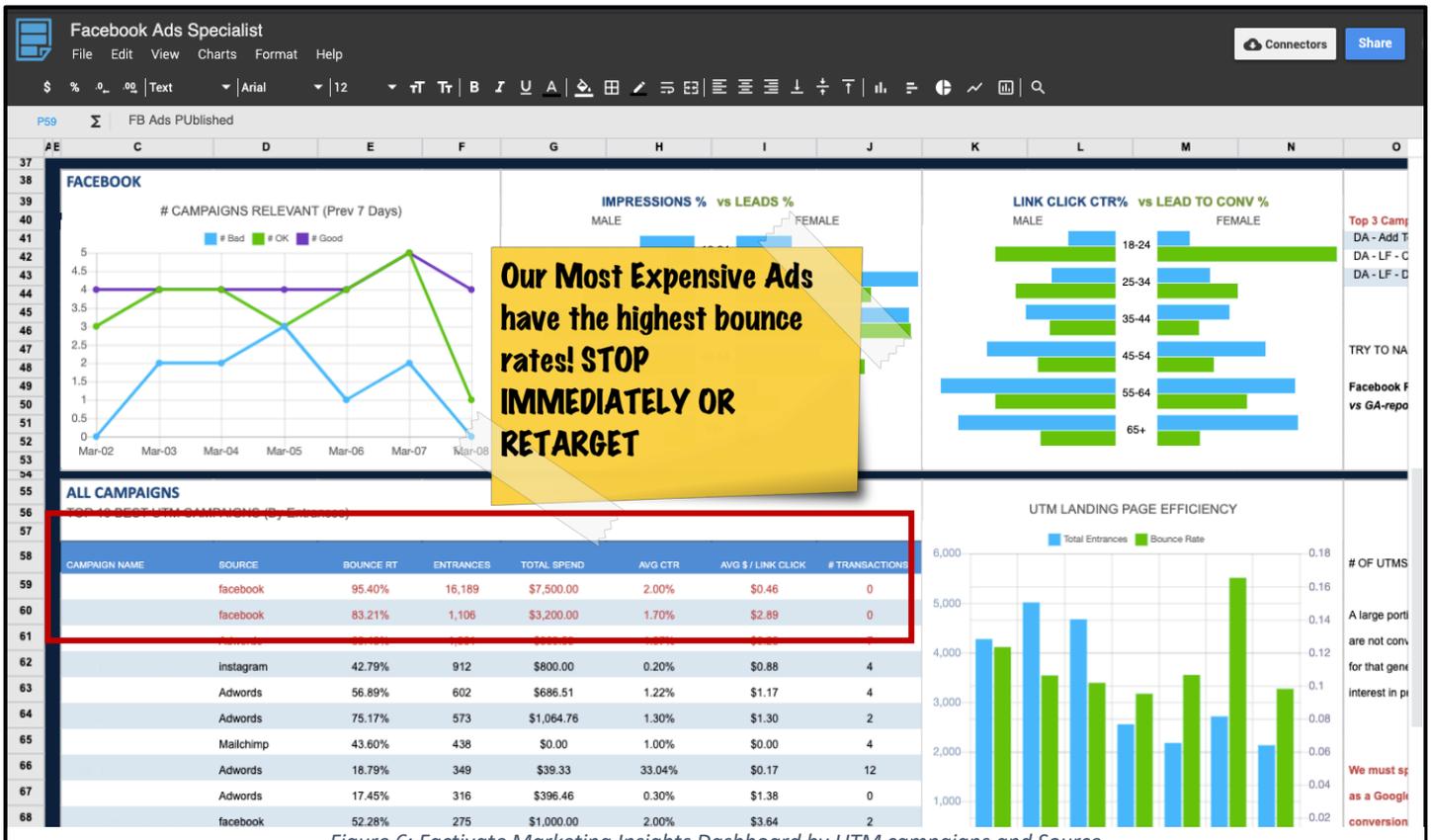

Figure 6: Factivate Marketing Insights Dashboard by UTM campaigns and Source