Evaluate Lead Source Effectiveness

This article applies to:

There are two lead source reports that help you evaluate how well a lead sources or a group of lead sources are performing: Lead Source ROI and Lead Source ROI by Category. These reports allow you to make educated choices about where to (or not to) spend your marketing dollars. Lead sources are automatically created and assigned to one of the five standard lead source categories (Direct, Organic, Social, Referral, and Paid) through the Max Classic web tracking code. You can also manually create lead sources and lead source categories. You must track lead source expenses consistently to produce relevant and accurate ROI reports.

If you are using the Max Classic web tracking code in all of your web properties, lead sources are also automatically assigned to contacts when they sign up for something or make a purchase. Users should assign lead sources to contacts manually when importing a list or entering a contact manually. These reports are available through **Marketing > Lead Generation > Return on Investment**.

The lead source reports provide you with the following statistics:

- Total Expenses for an individual lead source or lead source category
- Total Revenue for an individual lead source or lead source category
- ROI (Total Revenue minus Total Expense/Total Expense)
- Number of Visitors
- Cost per Visitor (Total Expense divided by Total # Visitors)
- Number of Contacts
- Cost per Contact (Total Expense divided by Total # Contacts)
- Number of Customers
- Cost per Customer (Total Expense divided by Total # Customers)
- Visitor to Contact conversion percentage (# Visitors with lead source divided by # Contacts with lead source)
- Contact to Customer conversion percentage (# Contacts with lead source divided by # Customers with lead source)

Lead Source ROI

The Lead Source ROI report provides statistics for individual lead sources. Click on report hyperlinks to view the lead source category ROI report or the specific list of contacts or customers assigned to a lead source. The most common filters include lead source, lead source category and relevant date ranges. The expense Incurred date range is especially important. Align the expense incurred end date with the end date of monthly recurring billing if a lead source involves recurring expenses otherwise an expense may be included in the report before the results have been tracked. Click on the Misc. tab to filter this report by tag, sequence, purchased products, opportunity stage, and web form to evaluate effectiveness of a specific lead generation effort, product promotion, or sales process.

Lead Source ROI by Category

The Lead Source ROI by Category report provides summary level lead source data that can be used to evaluate specific methods of lead generation. This report aggregates the data for individual lead sources to display the same data at the category level. This can help you evaluate the overall performance of specific groups of lead sources. The default lead source categories are Direct, Organic, Social, Referral, and Paid, however you can also create custom lead source categories assign lead sources to them. You can filter this report by lead source, lead source category, relevant date ranges, tag, sequence, purchased products, opportunity stage, and web form.