



# KEY METRICS

To Track at Every Step of the Funnel

**Prepared by:**

JAMIE DUBOSE

CEO, FOUNDER OF ZENPLICITY

JAMIE@ZENPLICITYNOW.COM

---



## HELLO, MY FRIEND!

I'm so glad you picked up a copy of this book. If I had a nickel for every time someone told me they didn't know where to begin with tracking metrics and data for their business, I'd have ALOT of nickels. :)

I love helping businesses understand the power (and necessity) of monitoring marketing metrics, and I believe it doesn't have to be hard, time-consuming or difficult to maintain. Keep reading because I'm going to break down the marketing process into three distinct areas, the Top of Funnel, Middle of Funnel, and Bottom of Funnel, and I'm going to give you a few KEY metrics that you should be paying attention to at every step.

At the end of this book you will:

- Know what metrics to track
- Know how to find them
- Know why they're important

Dive in, and let's take it from the top -- the Top of the Funnel, that is!

Thanks again for downloading!

## BEFORE WE GET STARTED...

Before we dive into the key metrics to track at every step of the funnel, let me cover a cover basic assumptions that I'm making:

1. I'm assuming you have Google Analytics (GA for short) set up for your site. It's okay if you're not using it, as long as it's tracking visitors, you should be covered.
2. I'm also assuming you're picking date ranges that work well for your particular business model.

Some small businesses track metrics on a monthly basis, and other larger companies prefer to track metrics on a weekly basis. Whichever is the case for you, remember to stay consistent throughout the data collection process.

Also, be sure to download the corresponding [Key Metrics Tracking Spreadsheet](#) so you can start monitoring your metrics today!

# PART 1

## Key Metrics to Track at the Top of Funnel

Everything that happens at the Top of the Funnel has one objective: **to acquire new visitors** to your website. This includes adding new content on your blog, investing in paid advertising strategies, and any other marketing strategy that sends people to your website. Each of these activities has a purpose of getting more people to your site to view your content.

### TOF KEY METRIC: TOTAL VISITORS

Website visitors are the lifeblood of your business. This metric is important for business growth because it's the gasoline that makes the engine run. We want to see a consistent and steady increase in total visitors so we can be sure we're growing an audience that we can nurture and hopefully convert to new customers as they move through the marketing funnel.

### Where & How to Find This Metric

Terminology to note: Users in GA = Visitors.

The Total Visitors metric is a **Total Count** number, and we'll use Google Analytics to find it.

Once you're logged into Google Analytics:

1. navigate to **Audience -> Overview**
2. locate the **Total Number of Visitors** based on your date range criteria

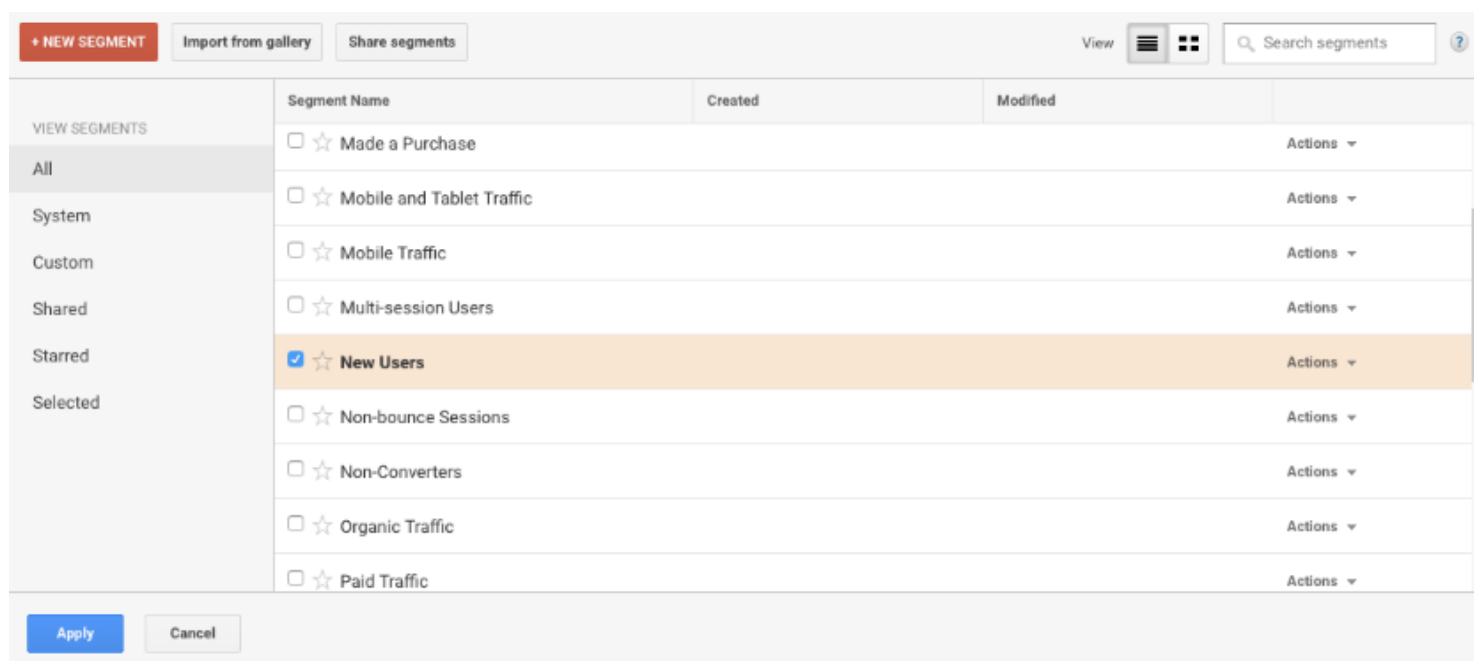
### TOF KEY METRIC: TOTAL VISITORS

It's important for us to track new visitors because this metric is an indicator of how well our brand is expanding to a new audience. We also need to track new visitors so we can run a quick percentage calculation to compare returning visitors vs. new visitors.

## Where & How to Find This Metric

The **New Visitors** metric is a Total Count number, and we'll use Google Analytics to find it.

1. navigate to **Audience -> Overview**
2. click to **Add a Segment**
3. select the **New Users Segment**
4. click **Apply**



## TOF KEY METRIC: PERCENTAGE OF NEW VISITORS

When analyzing data, you want to be sure you're using percentages so you can get a proportional understanding of growth over time. In this case, we want to find the percent of new visitors based on our total number of sessions for our given time frame.

## Where & How to Find This Metric

The **% New Visitors** metric is a calculation, and we'll use the data we collected for New Visitors & Total Visitors to help us find the percentage.

GA will also automatically calculate this for you, but it's good to know how to find it yourself. :)

**Here's the formula: % New Visitors = New Visitors/Total Visitors**

To save you a couple steps, I created a **Key Metrics Tracking Spreadsheet you can download by clicking here**. Just plug in your raw numbers and the calculations will be done for you.

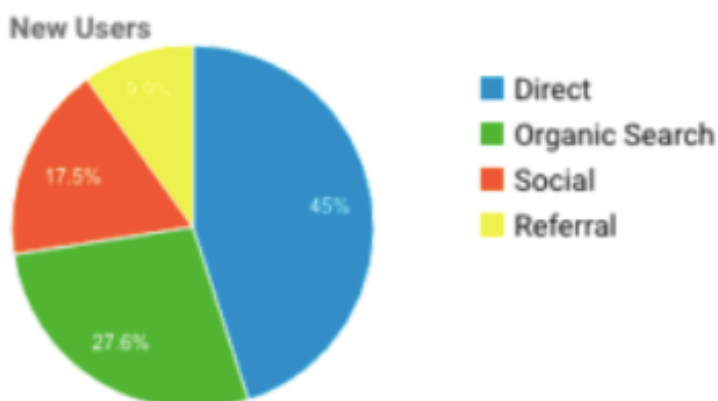
## TOF KEY METRIC: DIRECT NEW VISITORS

**Direct New Visitors** are the people who came to your website by specifically typing in your URL in their browser. This metric is fun to watch because it can indicate whether or not people know your brand or website name well enough to literally type it in vs. searching for it Google or other acquisition channels.

### Where & How to Find This Metric

The **Direct New Visitors** metric is a **Total Count** number. To find our Direct New Visitors, we're going to use the segments we created in Google Analytics for the previous metrics to find our Direct New Visitors.

1. navigate to **Acquisition -> Overview**
2. view the pretty graphs that appear
3. either **hover over the "Direct" section** of the pie chart or scroll down for a breakdown to find the **total count for Direct New Visitors** in your given date range.



## FINAL THOUGHTS ON TOF METRICS...

Tracking and measuring these key TOF metrics will help you set a baseline for success when it comes to growing your audience and expanding your reach.

**Remember, the objective of all TOF marketing strategies is to get more eyes on your site and on your content.**

Once you set those baselines for your business, you can begin to drill down into more advanced segmentation and visitor behavior.

## PART 2

### Key Metrics to Track at the Middle of Funnel

If the Top of Funnel is all about acquiring new visitors, the Middle of the Funnel objective is to **convert visitors into subscribers & build engagement** with those new subscribers.

#### MOF KEY METRIC: UNIQUE PAGE VIEWS

We need to be tracking **unique page views** so we can use this metric to help us determine other metrics we'll talk about in just a few minutes. This metric is also a simple, yet telling number because it indicates how much traffic we have coming to the site without counting repeated views.

#### Where & How to Find This Metric

The Unique Page Views metric is a **Total Count** number, and we'll use Google Analytics to find it.

1. navigate to **Audience -> Overview**
2. locate the **total number of Unique Page Views** based on your date range

#### MOF KEY METRIC: NEW LEADS / SUBSCRIBERS

It's important for us to track new leads (subscribers) because this metric is the **indicator for list growth**. This metric can be **found in your CRM** and tracked as an overall metric or drilled down to specify how well particular opt-ins or lead magnets are performing.



## Where & How to Find This Metric

The **New Leads (Subscribers) metric** is a **Total Count** number, and we'll use your CRM (Infusionsoft, Active Campaign, etc) to find it.

How you'll find this metrics will vary depending on what software you use.

Typically you'll be looking for total number of new contacts that were created during a specific time frame and through a specific web form.

## MOF KEY METRIC: SUBSCRIBER CONVERSION

Tracking unique page views for a particular lead magnet and keeping track of how many subscribers come through that web form is important, but it doesn't give us an easy number to compare month to month. We need to calculate the **Visitor to Subscriber conversion rate**.

## Where & How to Find This Metric

The **Visitor to Subscriber conversion** is a **rate**, and the two MOF metrics we just talked about to find it.

**Divide the # of subscribers / # of unique page views** to find the conversion rate to determine how well your lead magnets and opt-ins are performing.

## FINAL THOUGHTS ON MOF METRICS...

The middle of the funnel has tons of areas you can dive into to give you more insight into how your subscribers are engaging and interacting with your brand.

But the most important place to start is making sure your website lead magnets and opt-ins are doing their job: converting visitors to subscribers.

**Remember, the objective of all MOF marketing strategies is to convert subscribers and build engagement through email.**

Once you start tracking these MOF metrics, you can begin to drill down into more advanced segmentation and email subscriber behavior.

## PART 3

### Key Metrics to Track at the Bottom of Funnel

If the Middle of Funnel is all about converting visitors to subscribers and building engagement, the Bottom of the Funnel objective is to **convert subscribers into buyers**. The metrics we'll be looking at are all revenue-based because that's ultimately how we can determine how well our business is doing.

#### BOF KEY METRIC: UNIT TYPES SOLD / TOTAL PRODUCT REVENUE

This metric is pretty basic, and it's exactly what it sounds like, but surprisingly many of business owners don't take time to itemize, organize and track their offers and products on a regular basis.

#### Where & How to Find This Metric

Navigate to the area that displays your **product / order reports in your CRM**.

Locate the **total number of units sold** for each of your products or offers within your selected date range.

Write the **total number of units and corresponding total product revenue** on your tracking spreadsheet.


## BOF KEY METRIC: AVERAGE ORDER VALUE

Average Order Value (AOV) is a really important metric because it **helps business owners reach revenue goals faster** by offsetting marketing investments like paid advertising through cross-sells, up-sells and discounts. It's the average dollar amount that each customer spends at your business.

### Where & How to Find This Metric

AOV is calculated by dividing your total revenue by the number of orders during a specific time frame.

HOW TO CALCULATE  
AVERAGE ORDER VALUE

$$\text{AOV} = \frac{\text{TOTAL REVENUE}}{\text{\# of UNITS SOLD}}$$


ZENPLICITY  
Marketing. Membership. Metrics.

## BOF KEY METRIC: REVENUE PER VISITOR

Revenue Per Visitor tells us how much money is generated each time someone visits your website.

**This metric is important because it helps us gauge how much money we should be spending on paid advertising to acquire new customers.**

One thing to remember when you're calculating RPV: you want to use unique visitors, not visits. Otherwise your numbers will be skewed for this metric.

The reason this metric is important is simple: when we know how much each visitor is worth, we can make more accurate projections of how increasing TOF strategies will impact our bottom line.

### Where & How to Find This Metric

Divide total revenue by the # of unique visitors during a specific time frame to find the RPV for your business.

HOW TO CALCULATE  
REVENUE PER VISITOR

$$RPV = \frac{\text{TOTAL REVENUE}}{\text{\# OF UNIQUE VISITORS}}$$

ZENPLICITY  
Marketing. Membership. Metrics.

The infographic features a dark blue background with white text. The title 'HOW TO CALCULATE REVENUE PER VISITOR' is at the top. Below it, the formula 'RPV = TOTAL REVENUE / # OF UNIQUE VISITORS' is displayed. 'TOTAL REVENUE' is written above a horizontal line, and '# OF UNIQUE VISITORS' is written below it. A green rectangular icon with a dollar sign is positioned above the 'TOTAL REVENUE' text, and an orange monitor icon is positioned below the '# OF UNIQUE VISITORS' text. At the bottom left is the ZenPlicity logo, which consists of a white 'Z' inside an orange circle, followed by the text 'ZENPLICITY Marketing. Membership. Metrics.'

## FINAL THOUGHTS ON BOF METRICS...

The Bottom of the Funnel metrics are probably the most important (and the most fun) metrics to track because they show how all of our marketing efforts are working.

**Remember, the objective of all BOF marketing is to convert prospects to buyers.**

The BOF metrics we track will give us information that we can use to make better business decisions that will help us scale, improve and grow the business.



We believe in the power of **strategic partnership**.

Our client relationships are built on a foundation of **collaboration, communication, and high quality work** with minimal errors.



We believe in the importance of **proactively communicating with our clients to deliver solutions, ideas, and strategies** that will increase efficiency, maximize profit, and improve retention.

We pride ourselves on **paying close attention to details and delivering the best experience in customer interaction**, whether we're working directly with clients or their team members and vendors.

We don't believe in a one-solution-fits all approach – **we offer customized packages and services** for business owners who are ready to move into the next level of success.



## CONNECT WITH ZENPLICITY

[jamie@zenplicitynow.com](mailto:jamie@zenplicitynow.com)

[www.facebook.com/zenplicity](http://www.facebook.com/zenplicity)

[www.instagram.com/jamiedubose](http://www.instagram.com/jamiedubose)

---