

LEAD TO SALE JOURNEY WORKSHEET

Use this worksheet to learn how to set conversion rates. Find descriptions on this page, examples on the following page and fill out your own worksheet on the final page



Conversion Type		
A	B	C
Conversion Action	(If Necessary) Conversion Breakdown	(If Necessary) Portion of Sub-Conversion
This is the Google Ads Conversion that you'd like to set a value for!	Some Conversion have different outcomes that may be present in one conversion (i.e. a phone call to an office that handles service requests, sales and information). If you have a conversion like this, you can use this column. Otherwise, don't worry about it!	If you have multiple sub-conversions in Column B, mark the portion of the time that action results in each of the sub-actions (i.e. How often is a call focused on sales, service or more info?)

Untracked Conversion Funnels and Values						
D	E	F	G	H	I	J
STEP 1	Conversion Rate STEP 1	STEP 2	Conversion Rate STEP 2	STEP 3	Conversion Rate STEP 3	Average \$ Value of a Conversion
The step of the conversion funnel that happens after Google tracking ends	How often someone passes through this conversion step. (i.e. 20% of customers who fill out a form place an order)	The next step of the conversion funnel that happens after Step 1 (but before the final conversion)	How often someone passes through this conversion step. (i.e. 20% of customers who fill out a form place an order)	The next step of the conversion funnel that happens after Step 2 (but before the final conversion)	How often someone passes through this conversion step. (i.e. 20% of customers who fill out a form place an order)	This is the average value of an end-conversion (i.e. the average revenue from selling a car is \$8,000)

Total Values	
K	L
(If Necessary) Sub-Conversion Values	Conversion Value
This is the value of your sub-conversion (if you have one). Calculated by $=C*E*G*I*J$, assuming all columns are filled in. Just eliminate any variables you didn't use from the equation	This is the end value for your conversion in Google Ads If you had sub-conversions, this is just a weighted average of your sub-conversion ($= C*K+C*K+C*K$) for all of the sub-conversions that you filled in. If you didn't have sub-conversions, then this is ($=E*G*I*J$). Please eliminate any variables that are blank from the formula!

LEAD TO SALE JOURNEY WORKSHEET EXAMPLE

Conversion Type			Untracked Conversion Funnels and Values							Total Values	
A	B	C	D	E	F	G	H	I	J	K	L
Conv. Action	(If Necessary) Conv. Breakdown	(If Necessary) Portion of Sub-Conv.	STEP 1	Conv. Rate STEP 1	STEP 2	Conv. Rate STEP 2	STEP 3	Conv. Rate STEP 3	Avg. \$ Value of a Conv.	(If Necessary) Sub-Conv. Values	Conv. Value
(e.g.) Phone Calls	Sales Phone Calls	50%	Qualifiers reach out to customers and determine if a customer is a qualified lead	20%	Qualified leads are invited to store, and show up	5%	Store visit results in a purchase	30%	\$100,000	\$300	v
	Service Phone Calls	30%	Customer comes into store	70%	Customer Purchases Service Package	90%	N/A	N/A	\$500	\$315	\$295
	Information Phone Calls	20%	Customer comes into store	10%	Customer makes a purchase	5%	N/A	N/A	\$50,000	\$250	^
(e.g.) Form Fills	N/A	N/A	Customer receives a call with a quote and decides to place an order	27%	N/A	N/A	N/A	N/A	\$10,000	N/A	\$2,700
(e.g.) Store Visit Value	N/A	N/A	Customer makes a purchase	60%	N/A	N/A	N/A	N/A	\$2,000	N/A	\$1,200

