



How to Track and Measure the Success of Your Marketing Efforts

A Simple, Repeatable System for Aging-in-Place Professionals

For contractors, OTs, designers, senior move managers, home tech installers any everyone else in the aging in place niche who want to see what's working, so you can do more of that, and stop guessing.

Today we'll set up a simple, repeatable system to see what's working in your marketing, so you can do more of that, and stop guessing.

Learning outcomes:

01

Translate business goals into measurable marketing goals

02

Set up a basic tracking stack (no fancy software required)

03

Read the numbers to make weekly decisions with confidence



Agenda

- 1 Define success and pick your numbers
- 2 Set up your tracking tools
- 3 Add UTMs and a lead log
- 4 Build a lightweight dashboard
- 5 Run a weekly marketing meeting (even if it's just you)
- 6 Decide what to do next based on the data

I'll demo with examples like home safety assessments, grab-bar installs, and caregiver education workshops.

Step 1: Define Success

Simple hierarchy:



Business goal

e.g., \$20k/month in booked projects



Marketing objective

20 booked assessments/month



KPIs (Key Performance Indicators)

Leads, consults booked, close rate, revenue, cost per lead (CPL), customer acquisition cost (CAC)

In marketing, a KPI (Key Performance Indicator) is a quantifiable metric used to measure how effectively a company is achieving its marketing objectives.

Targets to pick today (example):

- ****Leads:** 60/mo
- ****Booked projects:** 20/mo
- **Close rate:** 50%
- **Avg job value:** \$1,500
- ****Monthly revenue target:** \$15,000+ from marketing

 If you only tracked three numbers: Leads, Booked Projects, Revenue. Start there.

Step 2: Your Minimal Tracking Stack

A. Website & Search



- **Google Analytics 4 (GA4):** see traffic + conversions - *I use Clicky.com instead of Google Analytics - there is a fee but it's much easier to use than GA4.*
- **Google Search Console (GSC):** see keywords + pages
- **Google Business Profile (GBP) Insights:** calls, messages, website clicks

B. Lead Capture



- **One intake form** (on site) with: name, phone, email, ZIP, service interest, 'How did you hear about us?'
- **Booking link** (Calendly or similar) for assessments/consults
- **Phone number** people can call (optional: call tracking later)

C. Lead Log (start with a spreadsheet)



Columns: Date, Name, Contact, Service, Source (self-reported), UTM Source/Medium/Campaign, Stage, Outcome, Revenue, Notes

[Download Sample Spreadsheets Here!](#)

📌 If tools overwhelm you, use just GBP + a simple form + a spreadsheet. That alone beats most competitors.

Step 3: Track Where Leads Come From (UTMs)

What's a UTM?

Short tags added to a link so that your analytics program (Google analytics, Clicky.com or other program) can tell where traffic came from.

Standard naming convention (copy this):

Example link:

```
yourwebsite.com/assessments?utm_campaign=grabbars
```

How to add a UTM

- Decide what you want to name the UTM. So, if you want to track how many people click on a link to your page about grab bars then you could name it grabbars - like the example above.
- When you add the link to your content you just add ?utm_campaign=grabbars to the link like this example:

```
<a href="https://domain.com/grab-bars?utm_campaign=grabbars" target="_blank">HomeWatch Management</a>
```

Where to use UTMs:

- Social posts, bio links
- Email buttons
- GBP website link (optional if you also rely on GBP Insights)
- Partner websites (OT/PT clinic, senior center page)
- Paid ads

Pro tip: Keep track of the UTMs that you create so you remember them. Put them in your spreadsheet.

How To Track Your UTM Campaigns On Clicky.com

1. Open your Clicky dashboard.
2. Go to the website that you are working on.
3. Click on Campaigns in the top navigation menu.
4. Click on Setup
5. Click on Create new campaign
6. Name it
7. Choose whether you want "Landing page" or "Referring domain"
8. Enter that utm string in Match String

Clicky has two ways it can decide what counts as a "campaign." You pick which method it should use.

Option 1: "By URL (including variables)"

This is the one you want for UTM tracking. It means Clicky will treat any visit with a URL that includes UTM parameters (like ?utm_campaign=pageone) as part of a campaign.

Clicky reads that UTM data automatically and groups all those visits under the "pageone" campaign.

Option 2: "By referring domain"

This method ignores UTMs and instead identifies a campaign just based on where the traffic came from. For example:

All visits from facebook.com could be one campaign.

All visits from newsletter.partner.org could be another.

This is handy only if you're not using UTMs and you want to track referrals from specific partner domains.

Step 4: Set Up the Lead Log

Create these columns exactly:

- Date, Name, Email, Phone
- City/ZIP
- Service Requested (dropdown: assessment, grab bars, bath remodel, etc.)
- **Source (self-report):** "How did you hear about us?" (Google Search, GBP, Facebook Group, Senior Center, Friend, OT referral)
- **UTM Campaign** (from link, if present)
- Stage (New, Contacted, Booked, Completed, Lost)
- Outcome Reason (Won, Price, Timing, Not a Fit, No Response)
- Revenue (won deals)
- Notes

The image shows a computer monitor displaying a spreadsheet application. The spreadsheet has a header row with columns for various lead and sales data. The columns are: Name, Email, Phone, City/ZIP, Service Requested, Source (self-report), UTM Campaign, Stage, Outcome Reason, Revenue, and Notes. The spreadsheet contains multiple rows of data, with each row representing a lead. The data is color-coded by stage: New (green), Contacted (yellow), Booked (orange), Completed (red), and Lost (purple). The spreadsheet is displayed on a monitor in a blurred office setting.

Name	Email	Phone	City/ZIP	Service Requested	Source (self-report)	UTM Campaign	Stage	Outcome Reason	Revenue	Notes
John Doe	john.doe@email.com	555-123-4567	New York, NY	Bath Remodel	Google Search	utm_campaign=google	New			
Jane Smith	jane.smith@email.com	555-987-6543	Los Angeles, CA	Grab Bars	Facebook Group		Contacted			
Bob Johnson	bob.johnson@email.com	555-234-5678	Chicago, IL	Assessment	Senior Center		Booked			
Alice Brown	alice.brown@email.com	555-345-6789	San Francisco, CA	Bath Remodel	Friend Referral		Completed			
Charlie White	charlie.white@email.com	555-456-7890	Phoenix, AZ	Grab Bars	OT Referral		Lost	Price		

Step 5: Use a CRM Program

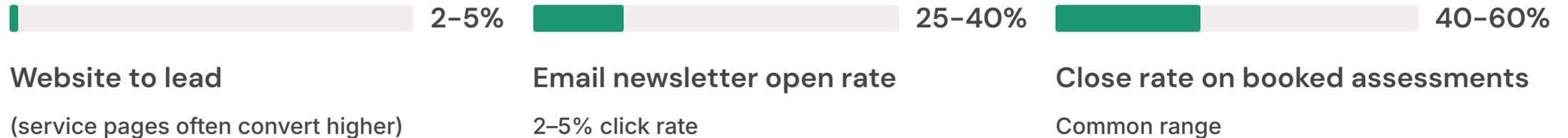
There are programs that you can use to help you do all of this tracking without having to create your own spreadsheets.

Some free or low-cost CRMs that balance simplicity and tracking:

- **HubSpot CRM (Free tier):** Great dashboards, campaign tracking, email logging. You can pre-load filters and pipelines for them (e.g. "Lead → Estimate → Job → Review").
- **Zoho Bigin:** Built for solopreneurs. Mobile app, easy to link to forms and calls.
- **Pipedrive (Lite plan):** Visual, drag-and-drop pipeline. Integrates with Google and Clicky tracking.
- **ClickUp CRM templates:** If some of your audience already uses it for project management, this ties in well.

What "Good" Looks Like for Local Service Pros

These are **ballpark starting points** (you'll build your own baselines in 4–6 weeks):



GBP Performance (Google Business Page)

Consistent calls/messages weekly; photo views trending up

Social Media

Small but steady referral traffic; comments from local audience

📌 Your market, prices, and reputation will move these. Trends matter more than any single 'benchmark.'

Step 6: Run a Weekly 20–Minute Marketing Meeting

Every Monday (or pick a day):

01

Update the lead log

(add last week's leads and outcomes)

Pick ONE action each week:

- Post three recent project photos to GBP
- Run one "grab bars winter" post in your neighborhood group

02

Answer these five questions:

- Which **source** brought the most leads?
 - Which **source** brought the most **won revenue**?
 - Where did leads **drop off** (Stage changes)?
 - Which **service** is hot right now?
 - What **one action** will I take this week?
-
- Email past clients: "Free 15-min safety check call"
 - Ask two happy clients for a GBP review (send them your direct link)

Interpreting the Numbers

If traffic is up but leads are flat:

strengthen CTAs (call to actions), simplify forms, add phone number above the fold.

If leads are up but revenue is flat:

review qualification questions, adjust pricing script, improve proposals.

If GBP (Google Business Page) outperforms everything:

double down, add more photos, weekly updates, review requests, add Services.

If self-reported "referral" keeps winning:

build a tiny partner program (OT clinics, senior centers). Give them a trackable link with UTMs.

Actionable Steps

If Traffic Is Up But Leads Are Flat:

This means you're getting more visitors to your website, but they aren't *taking action* (like filling out your form, calling you, or joining your email list).

So the advice is to fix the **conversion bottleneck**, not the traffic:

- **"Strengthen CTAs"** → Make your call-to-action buttons clearer and more compelling. Instead of "Submit," say "Get Your Free Consultation" or "Download the Checklist."
- **"Simplify forms"** → If your contact form asks for too much, people bail. Try just name, email, and phone number.
- **"Add phone number above the fold"** → Put your phone number in a visible spot near the top of the page (where visitors see it without scrolling). It signals trust and makes it easy for them to reach you.

In short: people are visiting, but not converting, so tweak the *experience* that turns visitors into leads.

If Leads Are Up But Revenue Is Flat:

It means: you're getting more people to inquire or sign up, but those inquiries aren't turning into paid work or sales.

So the fix isn't "get more leads," it's "make the leads better and the close stronger":

- **"Review qualification questions"** → Check what you ask on your forms or calls. Are you filtering for the *right kind* of clients (those with budget, urgency, or need)?
- **"Adjust pricing script"** → Maybe your sales pitch or how you explain pricing isn't landing. Try reframing value, using examples, or adding smaller package options.
- **"Improve proposals"** → Make your quotes or proposals clearer, more persuasive, and visually polished, show outcomes, not just costs.

Basically, you're attracting attention, but not converting it into income, so the focus shifts to how you screen, present, and close.

If GBP Outperforms Everything:

That means your **Google Business Profile (GBP)**, the listing that shows up on Google Maps and in local search, is bringing in more leads or calls than your website or ads.

So instead of spreading energy everywhere, you'd **double down** on what's clearly working. The list that follows are specific ways to strengthen that profile:

- **"Add more photos"** → Google rewards active listings. New photos of your work, staff, or clients' homes (with permission) keep it fresh and boost visibility.
- **"Weekly updates"** → Post short updates or offers just like social media posts, Google notices consistency.
- **"Review requests"** → Ask happy clients to leave reviews. It's the single strongest ranking and trust factor for local businesses.
- **"Add Services"** → Fill out the Services section with specific keywords ("grab bar installation," "home safety assessments," etc.) so you show up in more searches.

In short: if Google's listing is pulling the best results, feed it, it's your most valuable digital storefront.

If Self-Reported "Referral" Keeps Winning:

It's saying: if most of your new clients say they found you through a "referral," that's your strongest source of business, so formalize it instead of leaving it to chance.

Here's the breakdown:

- **"Build a tiny partner program"** → Create simple referral partnerships with people or organizations that already serve your target audience (like occupational therapy clinics, senior centers, or home modification pros).
- **"Give them a trackable link with UTMs"** → Create unique links for each partner (for example, `yourwebsite.com/?utm_source=otclinic&utm_campaign=referral`). That way, you can see exactly how many visitors or leads came from that partner when you check your analytics.

In plain terms: turn casual word-of-mouth into a *structured, measurable referral system*.

What to Track by Channel (Quick Cheat Sheet)



Website/SEO

sessions, top pages, conversions, form completions



GBP

calls, messages, website clicks, photo views, reviews added



Email

sends, opens, clicks, replies, booked calls from email



Social

reach, link clicks, profile clicks, comments from locals



Partnerships/Referrals

of intros, leads, wins, revenue per partner



Ads

impressions, clicks (CTR), conversions, CPL, CAC, revenue

Scripts & Snippets You Can Steal

“

Intake question:

"Just so I can thank them, how did you first hear about us?"

”

“

Review ask (text/email):

"Thanks again for trusting us with your home safety project. Would you mind leaving a quick Google review? It really helps other families find us. [Your short GBP link]"

”

“

Partner outreach:

"We help older adults stay safely at home with quick modifications. If your clients need grab bars, lighting, or home safety assessments, I'd love to be your go-to resource. Here's a one-page overview and a trackable link for your website."

”

Common Pitfalls

- **Tracking too many metrics**
(pick 3–7 to start)
- **Inconsistent UTM names**
(use the same words every time)
- **No single lead log**
(leads scattered in DMs, voicemail, sticky notes)
- **Changing offers too fast**
(give a test 4–6 weeks)
- **Not asking for reviews**
(GBP momentum matters)



Your 7-Day Quick Start (Action Plan)



Day 1

Define goal + KPIs, create lead log sheet



Day 2

Install/verify GA4 & GSC, confirm GBP access



Day 3

Add intake form question + booking link



Day 4

Set UTM convention + create UTM Builder tab



Day 5

Build Summary dashboard (pivots + basic formulas)



Day 6

Add at least 10 past clients to a "Reviews Ask" list



Day 7

Hold your first 20-minute marketing meeting

Handouts (include as downloads or slide notes)



Lead Log Spreadsheet Structure

(the columns listed above)



UTM Builder Tab

(cells for source/medium/campaign + concatenated URL)



Weekly Meeting Checklist

(the five questions)



Review Request Template

(text + email)



Partner Outreach Email

+ trackable link instructions

[Download Sample Spreadsheets Here](#)