

The Search-to-Lead Measurement Template for Niche Digital Platforms

A workbook for defining events, funnel gates, lead quality, attribution and partner reconciliation without collapsing distinct metrics.

HOW TO USE THIS TOOL

- 01 Write the measurement contract before adding tags or dashboards.
- 02 Define the evidence gate and non-claim for every funnel stage.
- 03 Join web, lead and outcome systems with a stable pseudonymous ID.
- 04 Report quality and reconciliation coverage beside volume.

Operating framework only. It does not prescribe universal benchmarks, guarantee attribution accuracy or replace privacy, analytics implementation or financial review.

Measurement contract

Name the decisions, systems and limits before adding events or building a dashboard.

PLATFORM / PROPERTY	REPORTING OWNER
PRIMARY USER TASK	PRIMARY COMMERCIAL MODEL
REPORTING PERIOD	TIMEZONE
ANALYTICS PROPERTY	CRM / LEAD SYSTEM

- ☐ Each metric has one owner, source, period and written definition.
- ☐ Search visibility, audience, actions, leads and outcomes remain separate.
- ☐ Personal information is not copied into analytics without necessity and authority.
- ☐ Definition changes are dated and annotated rather than silently restated.

Decisions this system must support

Funnel definitions

Define the gate and evidence for each stage so volume cannot quietly become quality.

STAGE	DEFINITION / GATE	SOURCE SYSTEM	OWNER	DOES NOT PROVE
Impression		Search Console		
Click / visit		Search / analytics		
Useful action		Analytics / product		
Submission		Server / CRM		
Valid inquiry		Operations		
Qualified lead		Operations / CRM		
Accepted handoff		Partner system		
Confirmed outcome		Partner / finance		

Event dictionary

Use stable names, real success triggers and only the parameters needed to diagnose the journey.

EVENT	TRIGGER	REQUIRED PARAMETERS	SYSTEM	TEST / OWNER
page_view	Useful page rendered	page group, platform	Analytics	
form_start	First valid interaction	form ID, intent	Analytics	
form_submit	Form success confirmed	form ID, channel	Analytics	
generate_lead	Lead record created	lead ID, category	Analytics / CRM	
qualify_lead	Criteria passed	lead ID, rule	CRM	
disqualify_lead	Criteria failed	lead ID, reason	CRM	
working_lead	Handoff contacted	lead ID, partner	CRM	
close_convert_lead	Defined outcome confirmed	lead ID, outcome	CRM / finance	

Use Google's recommended event names only when your trigger and business definition genuinely match them.

Lead validation and reason codes

Turn invalid or unqualified demand into diagnostic information instead of hiding it in a total.

CHECK	PASS RULE	FAILURE CODE	AUTOMATION	HUMAN OWNER
Spam		spam		
Completeness		incomplete		
Duplicate		duplicate		
Geography		out_of_area		
Service fit		wrong_service		
Contactability		unreachable		
Partner capacity		no_capacity		

- ☐ A unique lead identifier survives the web, platform and partner systems.
- ☐ Duplicate rules distinguish resubmission from a genuinely new need.
- ☐ Free-text notes are not used where a bounded reason code will work.
- ☐ Qualification criteria match the product's public promise.

Attribution and reconciliation

Document the join, time window and outcome rules before reporting partner or revenue impact.

ATTRIBUTION WINDOW	IDENTITY / JOIN KEY
REPEAT-SUBMISSION RULE	PARTNER OUTCOME SOURCE
REVENUE BASIS	RECONCILIATION CADENCE

LEAD ID	WEB EVENT	LEAD RECORD	PARTNER STATUS	OUTCOME	EXCEPTION

Report unmatched and stale records as coverage gaps. Do not infer revenue when only an introduction is confirmed.

Quality scorecard

Place quality, response and reconciliation beside volume; compare against your own consistent history.

METRIC	DEFINITION	CURRENT	PRIOR	CHANGE	DECISION / OWNER
Valid-submission rate	Valid / submitted				
Qualification rate	Qualified / valid				
Partner acceptance	Accepted / routed				
Median response time	Handoff to first action				
Uncontactable rate	Unreachable / attempted				
Duplicate rate	Duplicates / submitted				
Outcome coverage	Resolved / routed				
Reconciliation lag	Days to disposition				

These are definitions, not universal benchmarks. Preserve period, source and methodology with every report.

Experiment and change log

Protect trend integrity by recording changes to pages, forms, events, definitions and partner workflows.

DATE	CHANGE / HYPOTHESIS	PRIMARY METRIC	GUARDRAIL	OWNER	RESULT / DECISION

- ☐ Baseline period and implementation QA recorded before launch.
- ☐ Server success and analytics events checked together.
- ☐ Definition or tracking breaks annotated in reporting.
- ☐ Privacy and consent impact reviewed for new parameters.
- ☐ A failed experiment has a rollback and learning record.

Sources: Google Search Console metric guidance; Google Analytics recommended lead-generation events; Office of the Privacy Commissioner of Canada meaningful consent guidance.