SaaS Marketing Attribution Checklist

- [ ] **Measure Median Sales Cycle Duration:** Pull your historical CRM pipeline data from the last two quarters and calculate the median number of days it takes a lead to move from first web session to a closed-won contract.
- [ ] **Determine Volume Thresholds:** Calculate your exact number of closed-won deals per month; if it is under 50, commit to rule-based models rather than data-driven machine learning models to avoid statistical instability.
- [ ] **Select Your Attribution Model Strategy:** Choose First-Touch for early-stage discovery awareness, Last-Touch for short self-serve loops under 7 days, Linear for 30-to-90-day cycles, or Position-Based for complex enterprise cycles.
- [ ] **Provision the GTM Server Container:** Log into Google Tag Manager, select create container, and set the target platform to Server to initialize your first-party data storage environment.
- [ ] **Configure Your Custom Routing Subdomain:** Access your domain name registrar account (like GoDaddy or Cloudflare) and create a new A or AAAA record pointing a subdomain like metrics.yourdomain.com directly to your server container.
- [ ] **De-clutter Client-Side Tag Scripts:** Remove legacy, browser-bound tracking scripts from your website header files and route them exclusively through your secure server-side container to minimize browser load times.
- [ ] **Activate Google Analytics 4 Server Tags:** Install and configure the server-side GA4 web tag to act as your foundational data stream for raw click event reception.
- [ ] **Deploy LinkedIn Conversions API:** Configure the secure server-side LinkedIn Conversions API token parameters within the GTM server workspace to preserve attribution data from ad blockers.

- [ ] **Install Meta Conversions API:** Set up the server-side Meta Conversions API connection to pass duplicate-proof server events back to your social media advertising dashboards.
- [ ] **Enforce Lowercase Link Taxonomies:** Build a shared spreadsheet builder utility for your marketing team that automatically forces all text links into lowercase formats before deployment.
- [ ] **Standardize Ad Platform Tracking Strings:** Update your advertising tracking parameters to pass clear channel labels for source, medium, campaign, and ad creative variants.
- [ ] **Inject Invisible Input Fields into Web Forms:** Edit your product signup and demo request web forms to include hidden text fields named exactly after your target tracking parameters.
- [ ] **Write URL Parameter Capture Scripts:** Deploy a lightweight JavaScript listener in your web container that copies incoming query variables from landing page links and saves them into local browsing storage.
- [ ] **Automate Form Field Extraction:** Program your website form handlers to instantly pull stored parameters from local browser storage and paste them into the hidden fields during form submissions.
- [ ] **Deploy a Persistent Unique Browser Cookie:** Program your server-side framework to assign a random, unique cookie ID to anonymous website visitors that remains active for up to two years.
- [ ] **Build an Identity Resolution Webhook:** Write a backend database process that binds the visitor's unique anonymous cookie history to their newly created CRM lead profile the exact second they submit an email.
- [ ] **Construct a Domain-Based Account Mapping Rule:** Configure your customer data platform or CRM to group separate user email domains under a single master corporate company record to support account-based tracking.
- [ ] **Embed an Open-Ended Self-Reported Question:** Add a required, non-styled question field stating "How did you first hear about us?" to your main product demo request pages to unmask dark social touches.
- [ ] **Activate Ad Platform Auto-Tagging Properties:** Navigate to your Google Ads and LinkedIn ad account setting tabs and turn on auto-tagging options to automatically append click identifiers to all campaign URLs.

- [ ] **Build CRM Downstream Lifecycle Workflows:** Set up pipeline state automations in your CRM that register precise date and time stamps whenever an account changes to an qualified opportunity or closed-won status.
- [ ] **Map Payload Variables for Offline Event Syncs:** Code an automated integration workflow that extracts the click identifier, pipeline event name, timestamp, and local currency contract value from updated CRM records.
- [ ] **Automate Revenue Webhook Deliveries:** Deploy a cloud process using native platform connectors to send your offline revenue payload updates back to your advertising networks within a strict 90-day window.
- [ ] **Change Campaign Bidding Focus:** Shift your mature ad network campaigns from simple cost-per-click optimization settings to value-based bidding focuses once you accumulate at least 30 historical revenue uploads.
- [ ] **Connect Ad Account Spend Data Fields:** Use an integration tool to feed live spend metrics from your advertising channels directly into a centralized reporting database engine.
- [ ] **Join Expense Data Tables with CRM Tables:** Write SQL commands within your reporting application to match your daily campaign ad expenditure metrics side-by-side with your closed-won sales contract revenue columns.
- [ ] **Calculate True Channel Customer Acquisition Costs:** Apply formulas that combine marketing network spends with internal labor costs to find your true, blended customer acquisition expense per marketing stream.
- [ ] **Monitor Attribution Coverage Metrics:** Set up a data quality monitoring panel that tracks the percentage of closed opportunities that contain zero trackable marketing touchpoints to watch your data health.
- [ ] **Launch a Live Return on Ad Spend Dashboard:** Build an interactive executive visualization dashboard in Looker Studio that isolates net new annual recurring revenue against channel spend lines to guide your budget planning.