

 TOOLKIT

Conversion Tracking Kit

Measurement that ad platforms and your own reports can rely on, for lead-gen sites and online stores.



73 pages

20 Tag Manager recipes

80 QA and maintenance checks

Tracking plan workbook

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How to use this kit

This is an implementation manual. Work through it with your accounts open: every chapter ends in settings to change, a recipe to build or a check to tick.

Ad platforms decide who sees your ads based on the conversions you send them. Your own reports decide where the next dollar goes. When both run on a measurement setup you planned, named and tested, you can trust a cost per lead or a return on ad spend enough to act on it. This kit shows you how to build that setup for a lead-generation site or an online store, step by step, using tools you already have: Google Analytics 4 (GA4), Google Tag Manager (GTM), Google Ads, Meta, TikTok and your CRM or store admin.

What's in the kit

File	What it is	Use it for
This PDF	15 chapters, 20 Tag Manager recipes, a 60-point launch QA checklist and a 20-point monthly maintenance checklist	Building and testing the setup
<code>conversion-tracking-kit-tracking-plan.xlsx</code>	Tracking plan workbook: a default online-store plan, a default lead-gen plan, a blank plan, a UTM builder, a launch QA tab, a monthly checklist and a monthly results sheet	Planning, assigning owners, recording QA dates
<code>conversion-tracking-kit-developer-brief.docx</code>	Editable dataLayer specification and acceptance tests	Handing the technical part to a developer

The workbook opens in Excel and Google Sheets. It has no macros.

Pick your route

Not every chapter applies to every site. Use this table to see which ones you need, then read them in order.

Your site	Read	Skip or skim
Lead-gen site on WordPress or any CMS	1–5, 8–15 (the TikTok half of 9 only if you run TikTok)	6, 7 and the ecommerce half of 5
Store on Shopify	1–6, 9, 10, 12–15	7, and 8 unless you also take enquiries
Store on WooCommerce	1–5, 7, 9, 10, 12–15	6

Your site	Read	Skip or skim
Store that also sells by phone or quote	All of them	Nothing

How the recipes work

We don't ship an importable GTM container. Imported containers bring names, triggers and settings you didn't choose, and they break quietly when your site differs from the author's. Instead, every tag, trigger and variable you need is written out as a recipe table: the item, its exact type in the GTM interface, and every field to fill in. A recipe takes 5 to 15 minutes to rebuild by hand, and once it's built you understand it.

Recipes are numbered **R01** to **R20**. Names in recipes follow the naming convention in chapter 1, so your container ends up readable by the next person who opens it.

In recipes, `{{Name}}` is how GTM shows a variable reference. Type two curly brackets in any GTM field to pick a variable from the list.

Who this kit is for

- Owners and in-house marketers who run ads and want conversion data they can make budget decisions on.
- Junior marketers and freelancers who set up tracking for clients and want a standard process.
- Developers who are asked to "add the tracking" and want a precise specification.

Who it is not for

- **App tracking.** Firebase, app SDKs and app-store attribution are out of scope.
- **Warehouse-level analytics.** If you are modeling data in BigQuery or building multi-touch models across business units, you need more than this kit covers.
- **Marketplace-only sellers.** If all your sales happen on a marketplace and you have no site of your own, most of this does not apply.
- **Legal advice.** Chapter 4 explains how consent mode works and what Google requires. It does not tell you what your privacy law requires. Ask a privacy professional.

How long it takes

Plan on one to two working days to build a lead-gen setup, and two to four for a store with server-side events. Then leave a week for the data to settle before you trust it. Treat those as planning estimates, not measured averages: the real time depends on your CMS and on how many forms and platforms you run.

KEY IDEA

Plan first, tag second. Every hour spent on the measurement plan in chapter 1 saves several hours of fixing tags that measure the wrong thing.

Key terms

The terms used in this kit, defined once.

Term	Meaning
CAPI	Meta's Conversions API: events sent from a server rather than the browser
Click ID	An identifier an ad platform adds to the landing URL (<code>gclid</code> , <code>fbclid</code> , <code>ttclid</code>) so a later conversion can be matched to the click
CMP	Consent management platform: the banner and the system that stores each visitor's consent choice
Coverage ratio	Key events recorded in GA4 divided by orders or leads in your store or CRM for the same period
dataLayer	A list on the page where the site writes facts for Tag Manager to read
Data Manager	Google's tool, in Google Ads and as an API, for bringing CRM and customer data into Google's ad products
Deduplication	Recognizing that a browser event and a server event describe the same action, and counting it once
Enhanced conversions	Google Ads matching conversions to signed-in Google users with hashed first-party data
Event ID	A unique identifier sent with both copies of an event so platforms can deduplicate them
Event Match Quality	Meta's score for how well the customer information you send can be matched to Meta accounts
Key event	A GA4 event marked as important to the business; called a "conversion" before March 2024
Offline conversion	An outcome recorded outside the website, such as a qualified lead or a signed contract, sent back to an ad platform
Primary / secondary	Google Ads conversion actions used for bidding (primary) or only for observation (secondary)
Server-side tagging	Running tags in a server container you control, rather than only in the visitor's browser
Transaction ID	The order or lead ID sent with a conversion so duplicates can be removed and refunds adjusted
UTM parameters	Tags on a URL (<code>utm_source</code> , <code>utm_medium</code> , <code>utm_campaign</code> ...) that tell analytics where a visit came from

01

Write the measurement plan before any tag

A measurement plan is a one-page agreement on what counts as success, how each success is detected, what data travels with it and which platform receives it. Write it before you open Tag Manager.

Most broken setups we audit were not broken by a bad tag. They were broken by an unclear decision: two "lead" conversions that count the same form, a page view counted as a purchase, a phone-click event that nobody agreed was worth bidding on. A plan forces those decisions into the open while they are still cheap to change.

From goal to platform



The five questions the plan answers

- 1. What is the business goal?** Online sales, qualified leads, booked calls, sign-ups. Pick one primary goal per site. A second goal is fine; five goals is a sign nobody chose.
- 2. Which user actions prove progress toward it?** These become your events. Split them into *key events* (the outcomes you report on and may bid on) and *supporting events* (steps that explain the funnel).
- 3. How exactly is each action detected?** "Form submit" is not an answer. "The form's success message appears, confirmed by the plugin's success event" is.
- 4. What data travels with it?** Value, currency, order or lead ID, form name, item details. Decide the parameter names once and use them everywhere.
- 5. Which platforms receive it, and as what?** GA4 key event, Google Ads primary or secondary conversion, Meta standard event, TikTok event, CRM stage.

Key events vs supporting events

GA4 lets you mark up to 30 events as key events on a standard property ([Google Analytics Help](#)). You will use far fewer. A useful test: if this number doubled next month, would you change your budget? If yes, it's a key event. If it only helps you diagnose, it's supporting.

	Key event	Supporting event
Examples	<code>purchase</code> , <code>generate_lead</code> , <code>booking_confirmed</code> , <code>qualify_lead</code>	<code>view_item</code> , <code>add_to_cart</code> , <code>form_start</code> , <code>scroll</code>
Marked as key event in GA4	Yes	No
Sent to ad platforms	Yes, often as the optimization goal	Sometimes, as secondary signals or audiences
Carries a value	Usually	Rarely

WATCH OUT

Marking micro-actions such as page views, scrolls or "time on site" as primary conversions teaches bidding systems to find people who scroll, not people who buy. In one store account we reviewed, page views and phone calls were counted as conversions next to duplicated purchase actions, and the account recorded zero purchases in the period before the fix ([body makeup brand](#)).

Two default plans

The workbook ships with two complete plans you can adapt. Here is their skeleton.

Default plan for an online store

#	Event	Key?	Detected by	Must carry	Sent to
S01	<code>page_view</code>	No	Google tag on every page	page location	GA4, Meta <code>PageView</code> , TikTok page event
S02	<code>view_item_list</code>	No	Collection or category page	<code>items</code>	GA4
S03	<code>view_item</code>	No	Product page	<code>currency</code> , <code>value</code> , <code>items</code>	GA4, Meta <code>ViewContent</code> , TikTok <code>ViewContent</code>
S04	<code>add_to_cart</code>	No	Add-to-cart success	<code>currency</code> , <code>value</code> , <code>items</code>	GA4, Meta <code>AddToCart</code> , TikTok <code>AddToCart</code> , Google Ads secondary
S05	<code>begin_checkout</code>	No	Checkout loads	<code>currency</code> , <code>value</code> , <code>items</code>	GA4, Meta <code>InitiateCheckout</code> , TikTok <code>InitiateCheckout</code> , Google Ads secondary
S06	<code>add_payment_info</code>	No	Payment step submitted	<code>currency</code> , <code>value</code> , <code>items</code>	GA4, Meta <code>AddPaymentInfo</code> , TikTok <code>AddPaymentInfo</code>

#	Event	Key?	Detected by	Must carry	Sent to
S07	purchase	Yes	Order confirmation, once per order	transaction_id , value , currency , items	GA4, Google Ads primary, Meta Purchase , TikTok purchase event
S08	refund	No	Refund in store admin	transaction_id , value , currency	GA4, Google Ads adjustment
S09	sign_up / newsletter	No	Account or email sign-up success	method	GA4, Meta CompleteRegistration or Lead

Default plan for a lead-generation site

#	Event	Key?	Detected by	Must carry	Sent to
L01	page_view	No	Google tag on every page	page location	GA4, Meta PageView , TikTok page event
L02	form_start	No	First interaction with a lead form	form_id	GA4
L03	generate_lead	Yes	Form success state (chapter 8)	form_id , lead_source , value , currency , lead ID	GA4, Google Ads primary, Meta Lead , TikTok form event
L04	booking_confirmed	Yes	Scheduler's "booked" event	value , currency	GA4, Google Ads primary, Meta Schedule
L05	phone_click	No	Click on a tel: link	link_url	GA4, Google Ads secondary, Meta Contact
L06	whatsapp_click	No	Click on a WhatsApp link	link_url	GA4, Google Ads secondary, Meta Contact
L07	qualify_lead	Yes	CRM stage change	lead ID, click IDs	GA4 (optional), Google Ads offline, Meta CRM
L08	close_convert_lead	Yes	CRM "won" stage	lead ID, value , currency	GA4 (optional), Google Ads offline, Meta CRM

generate_lead , qualify_lead and close_convert_lead are Google's recommended lead events, documented with optional value and currency parameters ([GA4 event reference](#)). phone_click , whatsapp_click and booking_confirmed are custom names: GA4 has no recommended event for them, so we use plain, descriptive ones.



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