Mighty Orbit

The Ultimate Conversion Tracking Checklist for Digital Health Companies

How To Get More Leads For Your Digital Health Company

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This comprehensive checklist is designed to help you effectively identify the steps necessary to track conversions and ensure proper implementation.

Whether you're launching your first campaign or auditing the conversion process for existing campaigns. It covers all essential aspects of conversion tracking, from defining goals and mapping the customer journey to setting up various tracking pixels and integrating with your CRM system.

By following this checklist, you'll be better equipped to measure your marketing efforts' success and optimize your campaigns to maximize conversion and grow revenue.

Map Your Customer & Event Journey

- [ ] List key actions users takes on their journey to becoming a customer
- [ ] Develop a measurement plan: which actions will be tracked and why
- [ ] Develop an event tracking spec sheet:
  Examples include: Demo request, Form submission, Content download, Initiated call, Initiated chat
- [ ] Create an event tracking spec sheet (use our template here)
- [ ] Identify events to track, relevant pages and triggers, channels, and tracking codes
- [ ] Define key metrics and KPIs for tracking
- [ ] Set measurable goals for each KPI



Set up Google Tag Manager (GTM)

- [ ] Create a GTM account
- [ ] Install GTM on all domains
- [ ] Activate all built-in variables in GTM
- [ ] Create a click listener (all click trigger) in GTM
- [ ] Create triggers based on the event tracking spec sheet
- [ ] Create tags for Facebook, LinkedIn, Google Ads, and GA4
- [ ] Preview & debug: test all tags to ensure correct firing



Set up Facebook Pixel

- [ ] Create a Facebook Ads Manager account
- [ ] Confirm domain & install Pixel
- [ ] Set up Conversion API
- [ ] Add Facebook pixel tag to GTM (all pages)
- [ ] Implement custom events via GTM
- [ ] Create a tag with the Facebook Pixel code in GTM (all pages)
- [ ] Create audiences in Facebook Ads Manager
- [ ] Link audiences to Facebook campaigns
- [ ] Create Facebook conversion tags and triggers in GTM
- [ ] For non-standard conversions, create "custom conversions" in Facebook Ads UI
- [ ] Apply UTM URL tracking code to all campaigns



Set up LinkedIn Pixel

- [ ] Create a LinkedIn Ads Manager account
- [ ] Add Linkedin Insights 2.0 tag to GTM (all pages)
- [ ] Create conversion events and trigger via GTM
- [ ] Apply UTM URL tracking code to all campaigns



Set up Google Ads Pixel

- [ ] Create a Google Ads Manager account
- [ ] Install and link Conversion Tracking
- [ ] Add Google Ads remarketing tag to GTM (all pages)
- [ ] Link Google Ads and Google Analytics + import Google Analytics data
- [ ] Create Google Ads remarketing tag in Google Ads Shared Library
- [ ] Create audiences in Google Ads Shared Library
- [ ] Link audiences to remarketing and RLSA campaigns
- [ ] Create Google Ads conversions in Google Ads > Conversions UI
- [ ] Create Google Ads conversion tags and triggers in GTM
- [ ] Apply UTM URL tracking code to all campaigns (download our UTM tracker here)



Set up Google Analytics 4 (GA4)

- [ ] Install GA4
- [ ] Enable advanced categories
- [ ] Set up events
- [ ] Implement conversion event setup via GTM
- [ ] Create Google Analytics event tags in GTM
- [ ] Create Google Analytics conversion events from the events created in GTM
- [ ] Create a UTM URL tracking guide



Create a Tracking Dashboard

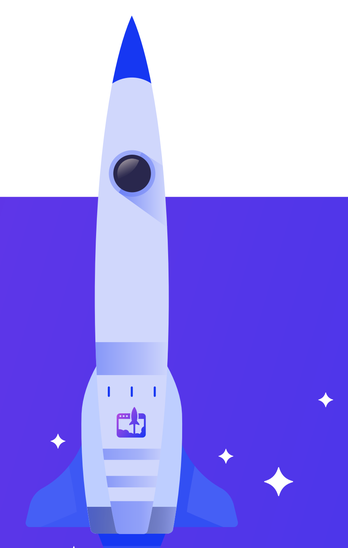
- [ ] Identify KPIs
- [ ] Use native CRM, Google Data Studio, or DataBox for visualization



Set up CRM

- [ ] Link ad accounts with CRM
- [ ] Add CRM tracking pixel to GTM
- [ ] We recommend HubSpot for most companies





Feeling overwhelmed or confused?
Schedule a free consultation for additional help or to have your campaign reviewed here.

Book a Growth Acceleration Session