Corporate Marketing

Standard Operating Procedure

Measuring Marketing Efforts through UTM Coding

By: Daniel Curren, 11/07/2016

Tested and approved by: Kevin McMonagle, 11/14/2016

This is a standard operating procedure for creating UTM codes. These codes are used to track the promotional and marketing efforts that backlink to CU Village websites (e.g., CUSG, MCUL, LMCUR, etc.).

Procedure:

1.) Go to https://ga-dev-tools.appspot.com/campaign-url-builder to create a UTM code.
2.) Fill out the form below with: **Website URL**, **Campaign Source**, **Campaign Medium** and **Campaign Name**. "Campaign Content" should only be used to differentiate ads that have identical campaign sources, mediums and names. Do not use "Campaign Term".
   a. **The naming conventions at this stage are crucial for measurement. Review the adjacent "Naming Convention" section for an explanation of how this needs to be done.

3.) At the bottom of the page a URL will generate based on the information you provided in the above sections. Test to verify that it works, then copy this URL – this is your UTM code.

4.) Next, go to the *Corporate Marketing SharePoint* team page: https://sprintcloud1001596.sharepoint.com/teams/CorporateMarketing/SitePages/Home.aspx?e=1%3A80bc80c5f3b7497aac4dfb573e54321b. Click on **Corporate Marketing Resources** and open the *Campaign UTM Codes* document under the *Campaign Tracking* section.

5.) Click "Edit Workbook" and then "Edit in Excel" - the excel document should open. Note: *Do not* use the "Edit in Browser" option

6.) Once the document is open, click "Edit Workbook". Then, use the tabs at the bottom of the spreadsheet to navigate to the correct department for your ad. If you do not see a tab that best fits your department, utilize the *Multi-Dept* tab.

7.) Once you find the correct tab, fill out all information it requests. **Make sure the information you enter matches <u>exactly </u>with the information you entered into the URL Builder in steps 1 & 2.**

8.) Once you have filled out the excel spreadsheet, click save and close the excel spreadsheet.

9.) Send the UTM code with the creative to the appropriate media contact for the trade publication.

Naming Convention: The following is a naming convention system that should be used when filling out the UTM creator form.

Naming Note: For all naming, either use title casing with no spaces, or hyphens in the place of spacing
- Ex.) "CUTimes" or "CU-Times" not "CU Times"; "PressRelease" or "Press-Release" not "Press Release"

Website URL: Where are we sending them? List the URL of the landing page.
- Ex.) http://www.cusolutionsgroup.com/technology-solutions; http://www.mcul.org/about-cri

Campaign Source: Where is the traffic coming from? If the source is internal (as in an internal email or press release), use "CUSG". Otherwise, list to name of the referring source.
- Ex.) Financial-Brand, CU-Today, Facebook, LinkedIn, CUNA, CUSG

Campaign Medium: What will the user click to get to us? This should be simple and general – that is to say –use "Banner" not "Med Rectangle Banner", or "SponsoredContent" not "350x200 Sponsored Content".
Always append four-digit, date code to end (April 7 = 0407, June 2 = 0602, August 1 = 0801, etc.)**
- Ex.) Banner-0203, Email-1121, NativeAd-0315, PressRelease-0422, SponsoredPost-0621

Campaign Name: What are we promoting? The more specific the better – if there is an ongoing, themed campaign (50-50-5k, Everyone Wins), use that. If not, use the product/service (MFM, Compease). If not applicable, use the division (Marketing Solutions). If there are multiple divisions, use "CUSG."
- Ex.) 50-50-5k, Save-to-Win, FIQ-Ad-Specialty, SmallCUAssist, PerformanceSolutions

Campaign Term: Do not use. This is only applicable to Google AdWords PPC campaigns.

Campaign Content: This should *only* be used as a last differentiator when deploying two or more ads that have an identical *Website URL, Campaign Source, Campaign Medium*, and *Campaign Name*. This will only happen if promoting the same product at multiple times on the same page.

- Ex.) If we were promoting Compease with a leaderboard banner, *and* a medium rectangle banner on the same page, at the same time, within the same trade publication, we would use:
    - o 1) Source: CUTimes, Medium: Banner, Name: Compease, Content: Leaderboard
    - o 2) Source: CUTimes, Medium: Banner, Name: Compease, Content: MedRectangle

http://www.cusolutionsgroup.com/marketing?utm_source=CUNA&utm_campaign=Marketing&utm_medium=Banner1107

Website URL
Where the traffic
is going

Campaign Source
Where the traffic
is coming from

Campaign Name
Why the traffic
is coming

Campaign Medium
What the traffic
will click to get there