

# The Beginner's Guide to Effective UTM Marketing

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# Using UTMs to Understand Your Traffic

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Knowing where your website traffic is coming from can be crucial. Does your traffic come from your social media channels? Or maybe from your blog? Which paid acquisition channel is bringing you more users? Where do you get your highest quality users from?

If you're promoting a campaign on social media, for example, you'll know how much traffic came from social media. Building a UTM code, however, can tell you how much of that traffic came from Facebook, or even a particular post on Facebook.

Fortunately, there is a very easy way to answer those questions by using UTM parameters for tracking.

## What are UTM Parameters?

UTM codes are snippets of text added to the end of a URL to help you track where website traffic comes from. Marketers can customize this text to match the webpage this URL is linked on, allowing them to attribute the success of that campaign to specific pieces of content.

**UTMs are currently the industry standard for tracking marketing campaigns across tools**, and are understood by analytics platforms like Google Analytics, MixPanel, SegMetrics and more. These days, most analytics tools, marketing apps, marketing automation tools, and CRMs look for these parameters automatically.

Here's an example of a URL with its own UTM code highlighted at the end of the URL below:

```
https://segmetrics.io/articles/the-must-read-marketing-segmentation-handbook/?utm_campaign=feature%20launch&utm_medium=social&utm_source=facebook
```

Let's break down each individual element of this URL to really understand it.

- `segmetrics.io/articles/the-must-read-marketing-segmentation-handbook` – Same page as the normal URL
- `?` – this tells your browser that everything after this point is just data

- **utm\_campaign=feature%20launch**  
We've defined "feature launch" as our UTM Campaign. Since spaces can't be used in a URL, the space is replaced with "%20"
- **&**  
This tells our marketing tools that we've finished defining the previous UTM and we're about to start a new one
- **utm\_medium=social**  
This shows that we're posting this link on a social medium to be shared (like Reddit, Facebook or Twitter)
- **utm\_source=facebook**  
We've noted that our link is being placed on Facebook

Adding these snippets of code after the question mark above doesn't affect anything on the page -- it just lets your analytics program know that someone arrived through a certain source inside an overall marketing channel, as part of a specific campaign.

In the above example, we used campaign, medium and source -- these are three of the five standard UTM parameters and why you might track them.

Feel free to skip Content and Term if you don't have a need for them. But definitely get in the habit of always using Medium, Source, and Campaign consistently. Many analytics tools assume that all three are used together. And by skipping one, you can create data gaps in your reporting.

Google has a [UTM Builder to help you put together these trackable URLs](#) whenever you need them.

## 1. Campaign

Campaign-based tracking tags group all of the content from one campaign in your analytics. Names that allow you to easily identify product launches, promotional campaigns, individual emails or posts, etc. are all good. The example UTM code below would help you attribute website traffic to links that were placed as a part of a seasonal discount promotion you're hosting.

**Example:** utm\_campaign=april-promotion

## 2. Source

A source-based URL parameter can tell you which website is sending you traffic. You could add the example code below to every link you post to your Facebook page, helping you to track all traffic that comes from Facebook.

**Example:** `utm_source=facebook`

## 3. Medium

This type of tracking tag informs you of the medium that your tracked link is featured in. You can use the example UTM code below to track all traffic that comes from social media (as opposed to other mediums, like email).

**Example:** `utm_medium=social`

## 4. Content

This type of UTM code is used to track the specific types of content that point to the same destination from a common source and medium. It's often used in pay-per-click (PPC) campaigns or with two identical links on the same page, as shown in the sample UTM code below.

**Example:** `utm_content=sidebarlink`

## 5. Term

A term- or keyword-based tracking code identifies the keywords you've paid for in a PPC ad. Additionally, if you have multiple links in the same campaign, like two links in the same email, you can fill in this value so you can differentiate them. For most marketers, this data is more detailed than they really need.

**Example:** `utm_term=marketing+software`



# The Importance of Consistency

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We've worked with hundreds of teams and different analytics implementations. By far, the biggest problem with UTMs is getting a team to use them consistently.

UTMs are pretty flexible, you can add whatever values to each parameter you want. Want to segment your marketing channels into your "fluffy bunny" medium, your "rainbows" medium, and your "pink unicorns" medium? Go for it! Completely up to you.

This flexibility has a downside though, flexibility also means a lack of consistency.

Let's use an example, say you want to tag all your links from paid channels with the same medium parameter.

What do you define that medium as?

**Well, you have a LOT of options:**

- Paid
- paid (yes, these are case sensitive in some tools)
- CPA (cost per acquisition)
- cpa
- PPC (pay per click)
- ppc
- CPC (cost per click)
- cpc

It's incredibly common for different people on the same team to use different terms for the same medium, source, or campaign. It's even pretty easy to use different terms yourself! We all get busy, forget what we used in the past, and tweak something accidentally. I catch myself doing this regularly.

**Whenever this happens, your data fragments.**

Messy data means that you'll have a terrible time trying to see what's going on. The problem can range from constantly having to manually massage a few rows yourself to having reports so messy that it's impossible to see where anything is coming from.

**How do we fix this?**

Whenever working with a new team or site, I always start with a basic Google Spreadsheet. Then I build a few columns that have dropdown selections, especially for medium and source. I'm paranoid about forcing consistency for those two values. And then I let folks fill in the campaign

and name parameters however they like. If you keep medium and source clean, the majority of your reporting problems will go away.

With a quick formula, you can even get the spreadsheet to build the final tracking URL for you.

The workflow goes like this for the whole team:

- For all external links, go to the team's UTM spreadsheet
- Add your destination URL in the first column
- Pick the medium from a dropdown of only 5-10 options
- Pick the source from a dropdown of 20-30 options (this list will be longer since each channel has a few sources within it)
- Fill out the campaign field
- Fill out the content field if you want (optional)
- Final URL is automatically populated in the last column

Quick and easy for the entire team to follow. It also gives you an ongoing record of every single trackable URL your team has built. Good to have if something breaks later and you have to diagnose the problem.

There's a few UTM tracking templates out there [like this one](#). Feel free to Google around until you find one you like. I usually find a free template from Google, create a copy, and then add dropdowns for the Medium and Source columns. Finally, I force the team to use that same spreadsheet every time they create a new URL. Once I've done that, I've never had an issue with getting a team to use the same values consistently.

## Using UTMs for Internal Tracking

How do we track links on our own site? What if we put a banner on our blog for a purchase, demo, or free trial, how do we tell if the banner drives conversions?

**I strongly recommend that UTMs never get used for your own internal links.**

How come? It'll break your analytics tracking.

You see, Google Analytics and other tracking tools typically start a brand new visitor session whenever a visitor arrives on a page with UTMs. They assume that UTMs are only being used on external links and then reset all session-level data.

That means that the session resets and the visitor now looks like they've visited your site multiple times.

All of these metrics will start to get skewed:

- Session totals
- Time on site
- Pages/visit
- Page entrances and exits
- Traffic sources and channels

Just about every metric in Google Analytics will change.

If this happens to a few visitors, it's not a big deal. You won't even notice it.

But if you have a steady flow of visitors that go through that campaign, you're permanently skewing your analytics data from reality. Analytics data is already hard enough to keep accurate, the last thing you want to do is make it worse intentionally.





# UTM Recommendations

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Using UTM parameters is very efficient to understand where your website traffic is coming from, but it is very important to do it correctly in order to really understand it, and make the right decisions based on it. Our advice is to create a set of rules on how to use UTM parameters and make sure everyone on the team follows those rules. If the UTM parameters usage is not consistent, and everyone will just fill in whatever they want, you will end up wasting time trying to figure it out on Google Analytics.

Here's a short example of how to set the rules, with some of our best practices.

## Using UTM Values in Emails

UTM Parameter	Value	Examples
utm_medium	email	email
utm_source	The type of email	newsletter, broadcast, campaign
utm_campaign	The name of the campaign or sequence	april-2019, welcome-campaign
utm_content	The subject of the email	get-access-now, my-awesome-email
utm_term	The position of the link in the email, or target of the link	top-link, footer-link, signup-link

## Using UTM Values in Social Posts

UTM Parameter	Value	Examples
utm_medium	social	social
utm_source	The name of the site that you're using	fb, tw, yt, reddit
utm_campaign	The name of the social post	amazing-butterflies, finding-your-way
utm_content	The category or topic of the post (if any)	butterflies, fermentation
utm_term	The name of the influencer for the social post, if any	jj125, marvelfan354

## Using UTM Values for Affiliates and 3rd Party Sites

UTM Parameter	Value	Examples
utm_medium	partner	social
utm_source	The name of the site that you're promoting from	lifehacker, hackernews, medium
utm_campaign	The name of the advertising or affiliate campaign	april-2019, welcome-campaign
utm_content	The category or topic of the post (if any)	butterflies, fermentation
utm_term	The position of the link in the email, or target of the link	top-link, footer-link, signup-link

## Using UTM Values in Ads

UTM Parameter	Value	Examples
<b>utm_medium</b>	The type of ad (cpc or retargeting)	cpc, retargeting, search
<b>utm_source</b>	The name of the ad platform	fb, tw, yt, ig, aw
<b>utm_campaign</b>	The name of the ad campaign	signup-retargeting
<b>utm_content</b>	The name of the ad	butterflies, fermentation-a-235
<b>utm_term</b>	The keywords for the ad, or the adset if not keywords	happy-flowers, why-are-flowers-awesome

# Next Steps

## Stop Wasting Your Marketing Dollars

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“With Infusionsoft, reports that should be available with a few clicks just aren't there. **Segmetrics changed that for us.** Now we can see exactly which leads are most profitable and where our biggest opportunities lie. Segmetrics is like your marketing crystal ball.”

**Chris Mason — Automation Marketer at Titans of Direct Response**

