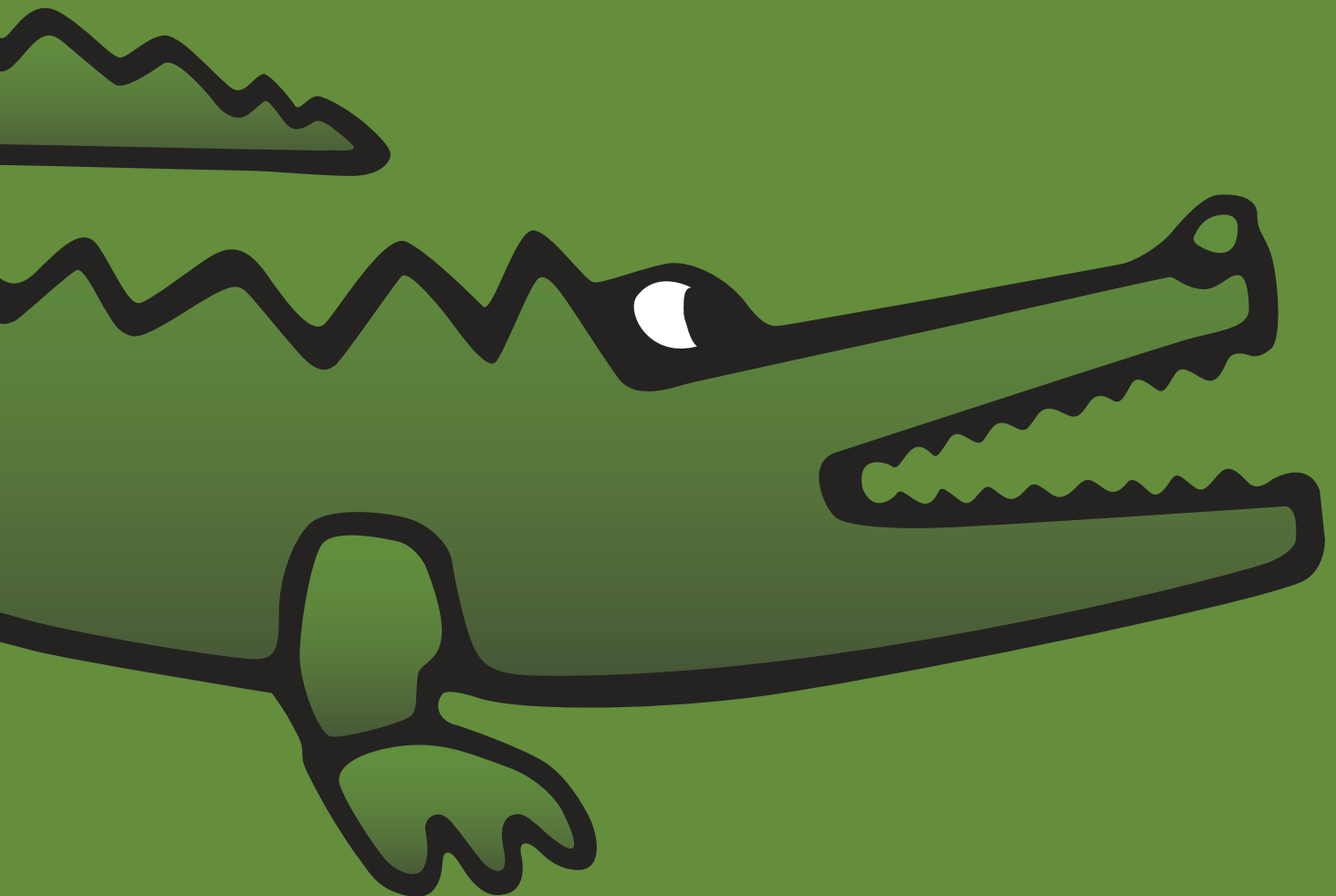# CommuniGator

Welcome To
GatorLeads

Your Quick Start Guide

A QUICK INTRODUCTION

Welcome to the GatorLeads family!

To get you started on your GatorLeads platform, we've created this super quick guide that covers the absolute basics of your GatorLeads account. If you'd like more information, you can also download the whole GatorLeads user guide on the customer portal too.

This quick 4 step guide covers the most important aspects of using our system. Once you've read this, you'll know how to find out who is on your website, where they are com ing from and what to do to turn them into paying custom ers.

Both sales and marketing can use these steps to meet their objectives. Sales in particular will gain a lot from step 2 and 4, and marketing will gain a lot of insight from step 3. So to get started on the basics, let's get you set up on GatorLeads….

Welcome again,

Gary Johns | GatorLeads Account Manager

(DDI) 01483 678 882
(M) 07795 325 843
(E) gary.johns@communigator.co.uk
(W) www.communigator.co.uk
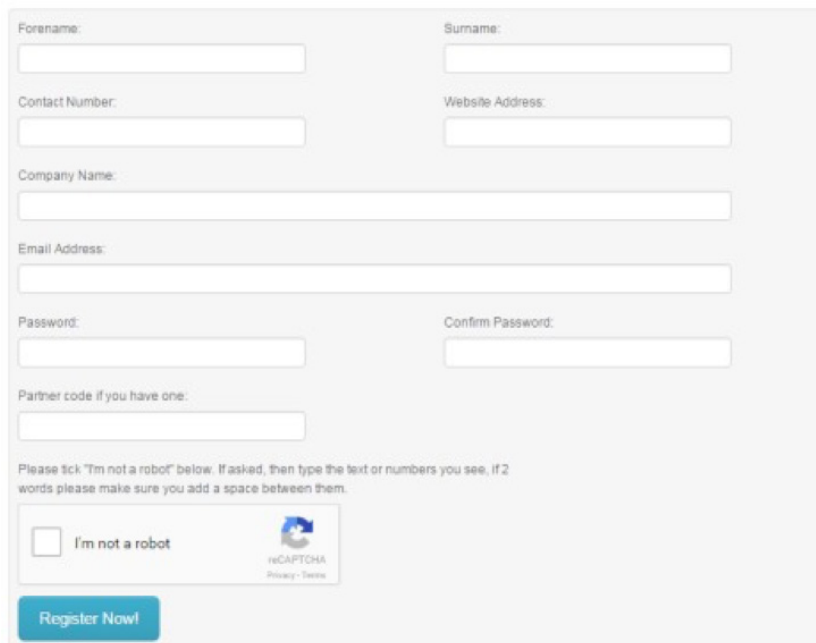
Contents

Step 1: Creating your account

Right, let's get started!

The faster we get your account set up, the sooneryou can start tracking leads.

If your Account Manager has already created your account, you can skip straight to step 2. Otherwise, you'll need to quickly fill out the registration page which you can find here:

https://app.gatorleads.co.uk/account/register

You'll be redirected to a page that looks like this…

As soon as you've filled out the details and clicked the Register Now button, your account will be set up.

Or, you can simply call our team directly on 01483 411 911 and they'll be happy to set up your account for you.

Install your tracking code

Don't worry, you don't need to be a tech expert to set up the GatorLeads tracking code on your website!

Once your account has been set up and verified, it will become active. When you attempt to log in to your account for the first time, you will be presented with a screen similar to this…

The grey bar in the middle contains your unique tracking code. Here is what you need to do with it:

1. Copy the code from the grey box and then insert it in header area (also referred to as the <head> tag area) of all the pages on your website you want to track visitors on.
2. For **Wordpress or other CMS users** – you may be able to insert this code into a shared header module rather than having to add it to each page individually.

This is the exact same process as inserting a Google Analytics code in your website. If you aren't comfortable doing this yourself or you don't have access to your Content Management System (CMS), your IT department should be able to do this in just a couple of minutes.

As soon as the code is up, GatorLeads will detect it and start recording your website activity. This includes who visited, which pages they went to, when they came on your website and everything else that happens.

Install your tracking code

If you have Wordpress, you can also upload your GatorLeads code on there as long as you have version 3 or above of the plugin. You can find the plugin here:
https://wordpress.org/plugins/gatorleads/

So, once you've logged into Wordpress, select Plugins from the menu on the left.

Then select "Add New" from the options at the top of the page.

In the Search box type "GatorLeads" then click on "Search Plugins." You should see GatorLeadsat the top of the page.

Simply click "Install Now" and click OK to the question confirming that you want to install the plugin.
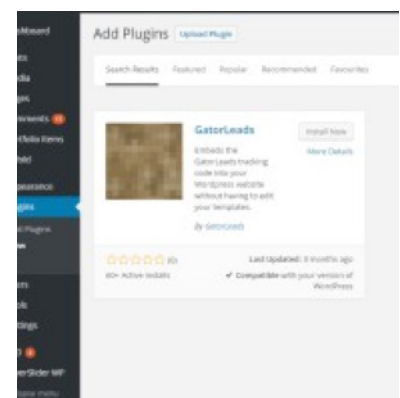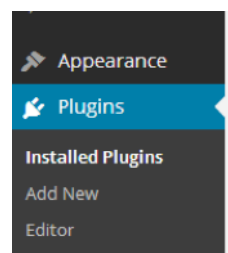
Install your tracking code... continued

From there, click on "Activate Plugin" link. You should then be able to see this on your main Plugin page as below.

If you hover over the Setting menu on the left you should see "GatorLeads". Click on this menu item. This section will show you the GatorLeads settings. To then finish off installing the code, you need to find your client ID which is in your GatorLeads account.
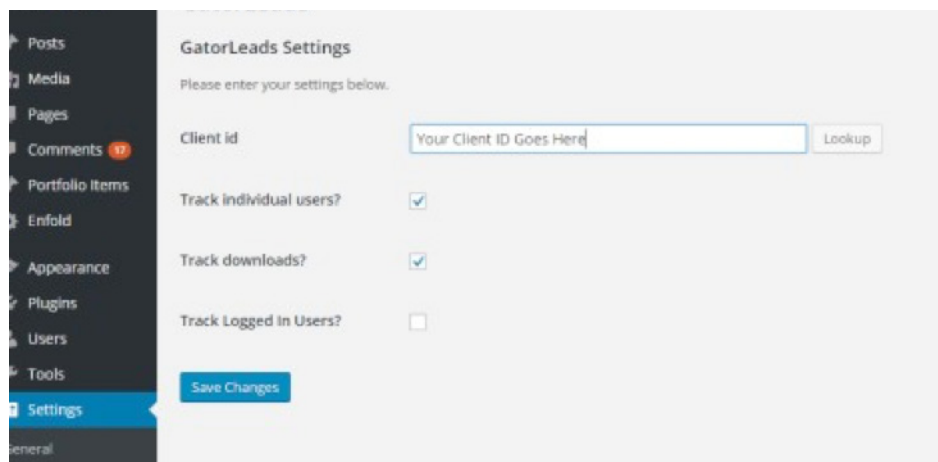
Find your client ID

Open a new browser tab and log in to your GatorLeads account.

From the Admin menu at the top of GatorLeads select "Embed Tracking" option under "Client Admin".

To the right you should see your Client ID, take a note of this.

Go back to Wordpress and enter the Client ID in the relevant section of the GatorLeads Settings

Go back to Wordpress and enter the Client ID in the relevant section of the GatorLeads Settings.
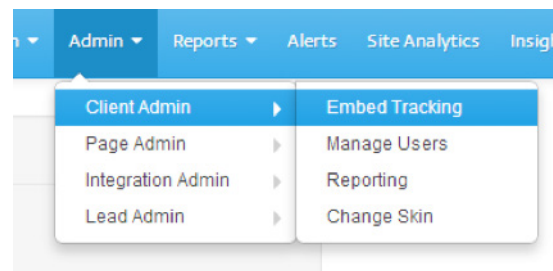
Save the settings. All done!

Please note: the tracking code will not be automatically inserted onto pages being viewed by non admin users.

Using section headers

For web pages which have sections that need to be tracked separately, each section can be coded with a title that will pass back as a separately identifiable page in our page scoring utility. By passing these values back, you can then identify visitors to specific sections of a web page and give those sections their own scores and categories.
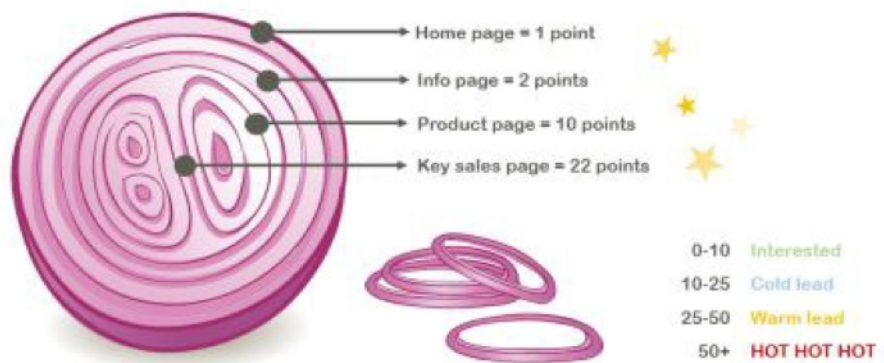
Code example for section headers:
<section class="example" data-wow-title="insert title" id="insert id">

Score your pages

Once you've set your code up, you need to score your pages. This is a really important step to make sure the **RIGHT** leads are coming through as **HOT** leads.

After doing a lot of research, we've built a point scoring system on which web pages work best for attracting, engaging or converting your leads.

This chart is a guideline on how to score your pages. We recommend you put this in place to make sure you are qualifying the right leads and **review if your page scoring is working every 12 weeks**. Please refer to this chart while scoring your pages (see relevant section below).

Home page = 1 point
Info page = 2 points
Product page = 10 points
Key sales page = 22 points

0-10   Interested
10-25 Cold lead
25-50 Warm lead
50+   HOT HOT HOT

Score your pages... continued

First of all, you need to decide which of your web pages fall into which point category. Don't base your points on where you are getting the most leads, but on where your leads have converted in the past.

For example:
A pricing page or demo request page is a clear indication your lead is interested in your business and therefore should fall into the 'key sales page' category.

The homepage or a blog page, despite receiving high volumes of traffic, it is not an indication that the lead is ready to buy. Therefore, it gets less points.

## Page Scoring & Categorisation

Creating page categories
Creating page categories makes it easier to segment your web content and identify which leads have been looking at which content. You can therefore identify your best sales opportunities and what they might be interested in much more easily.

Where do you create new categories?
When you log into GatorLeads there is an option in the top navigation called "Admin".

Click this link and follow the path through "Page Admin" and into "Categories".

The categories tab in GatorLeads Analytics will only appear if you have admin rights.
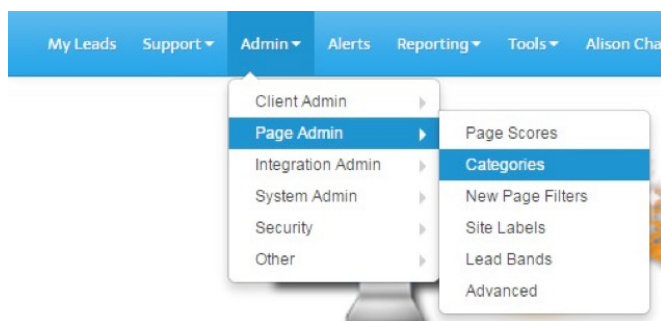
Adding new categories

If your website has information about multiple products, or you are placing the GatorLeads tracking code on multiple territory-based domains, categories are a great way to group your pages. You could set up categories for different products, types of service, or for types of content such as PDF downloads or web capture forms.
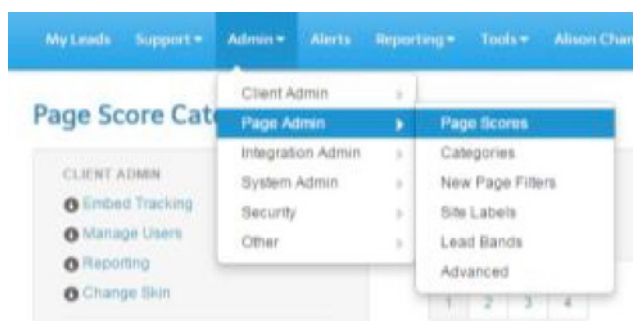
Applying categoies & page scores

Once the categories have been created, you can use them to group pages together when scoring them in the page scoring section. You can navigate to this section by going to Admin - Page Admin - Page Scores.


Once on this page, you can:

> ✓ **Search for the URL/alias, or a keyword from your website URL structure such as /   solutions/, by entering the search term in the search box then clicking 'Search.'**
>
> ✓ **The search box will then expand. You can then apply a score and category to all of the pages in your search results by entering the score, selecting a category from the drop-down menu and clicking 'Update.'**
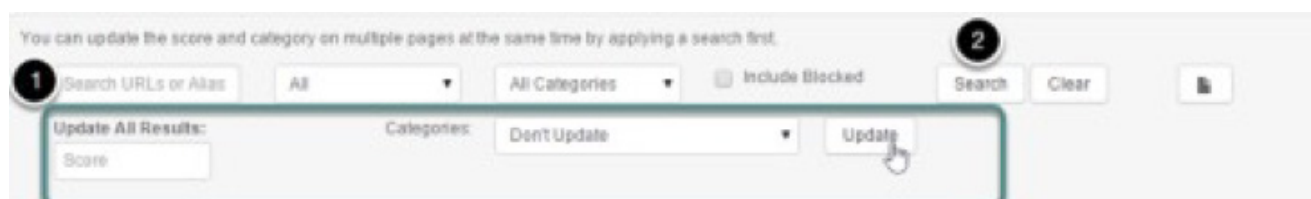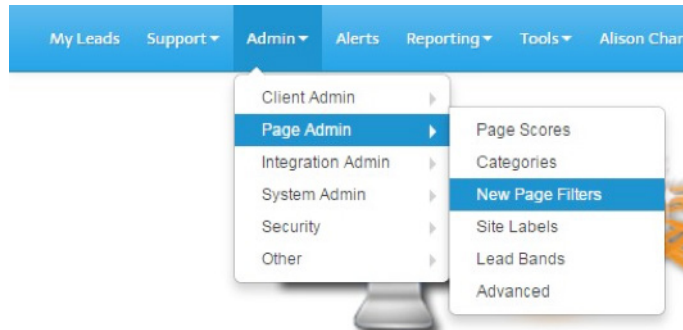

How to score & categorise individual pages

If you only want to categorise or score a single page, find the page using the search button and then click the 'Edit' button. This navigates you to the 'Update Page' window, where you can enter an alias, change the page score and select the category that you would like to associate the page with.
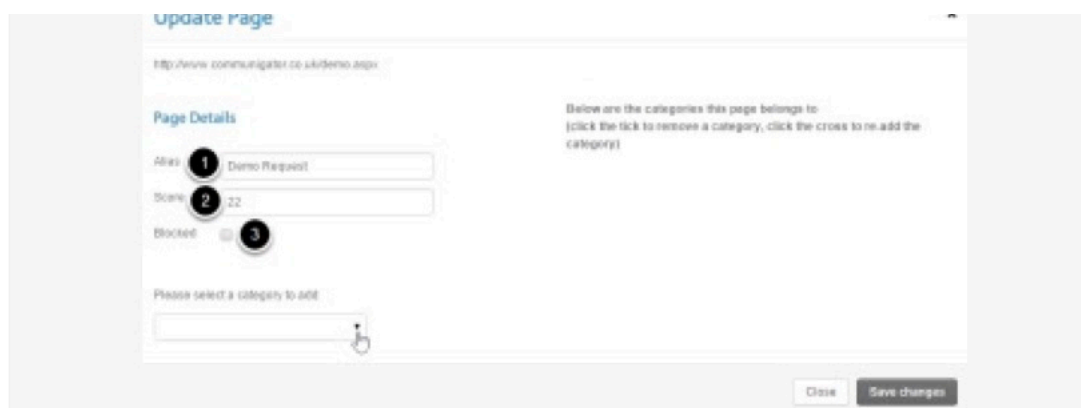
Automatically score new pages with New Page Filters

To ensure that any important new pages that are added to the site are properly scored, you should set up New Page Filters to pick them up and score/categorise them for you. You can do this by going to GatorLeads Admin - Page Admin – New Page Filters.

You'll see a page that looks like this:

Applying a new page filter

he New Page Filters section automatically picks up any pages that are new on your website and applies your filters in descending order from top to bottom. To set up a new filter, click 'Add Filter' at the bottom-left of the screen.

Once in the 'Update Filter' window, you can add a keyword to automatically score your new pages by. An example of this would be new blog pages with the URLs:
www.example.com/blog/blog1
www.example.com/blog/blog2

To automatically score any of the above URLs, you could use the filter "/blog/". This will automatically pick up all URLs which contain /blog/ and apply the score and category of your choosing. Once you've done, hit 'Update Filter.'

Step 2: Find out who is on your website

Once you've set up these sections of your GatorLeads account, you are ready to get started on tracking your leads!

When you log into your GatorLeads account, the homepage should be your Lead Grid which looks something like this…
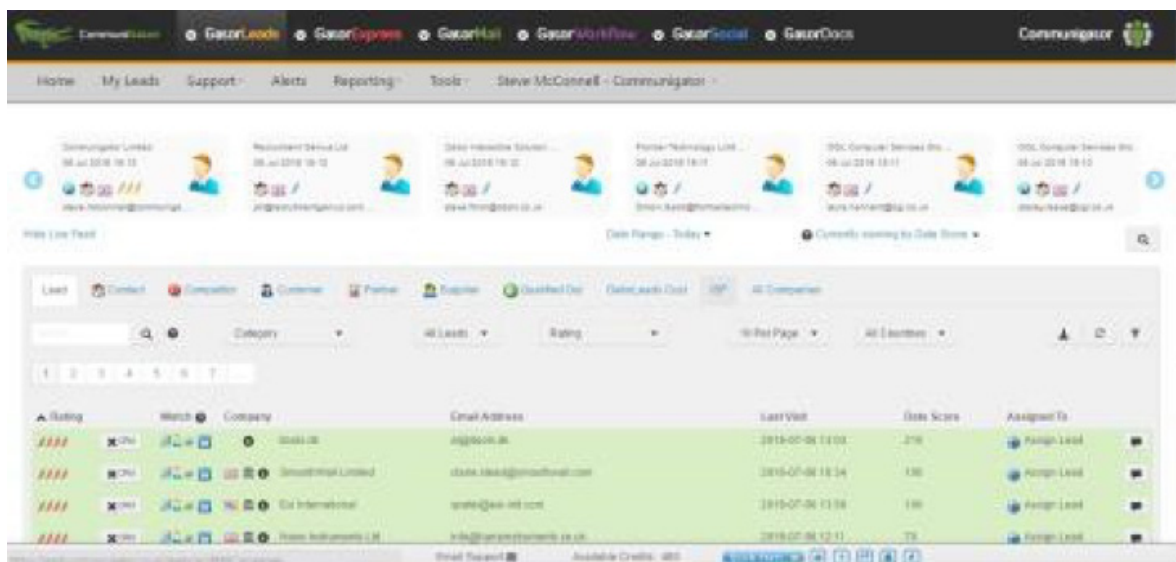
(You can also find it by clicking on the 'My Leads' tab in the top left corner of the menu bar)

This grid has quite a lot of information for you! So, let's run through it together starting at the top:

1. At the top of the lead grid are the 'Lead Type' tabs, allowing you to look through the different types of lead on your site. You can re-categorise these leads by clicking on the 'assign' button, or by uploading a list in Admin – System Admin – Upload Companies.

2. The next row contains filters to narrow down your leads by what content they've viewed, how hot they are as leads, who they're assigned to, and the country they're based in.

3. The rating colum n, located on the left-hand side of the lead grid, shows your leads' chilli rating. These chillis are based on the lead scoring you set up earlier.

4. The Watch Column is next. In this colum n you have three icons: a building, a person and a grey circle. If the building is in colour, it means GatorLeads has identified the com pany. If the person is in colour, it means GatorLeads has identified the individual. If the grey circle is green, it means you have placed a "watch" on a company and will be alerted every time that company comes back on your website.

5. The LinkedIn icon allows you to search LinkedIn for more information about your leads, or reach out through social media (why not send them a PURL link?)

6. The com pany colum n identifies the country the IP address was found from (the flag), gives a short com pany description (the building), and the company name.

7. The email address colum n will list any contacts you have identified at the company through GatorLeads's cookie technology.

8. The date score/total score colum n shows you the total score that lead has built up on your website over the date range of the table, or the total score of those leads regardless of date range. You can change between 'date score' and 'total score' next to the date range selector at the top of the screen.

9. The assigned to colum n shows the sales team member the lead has been assigned to.

10. The Notes icon in the very last colum n is where you can add notes about your lead.

Understanding each lead

From the lead grid, you can drill down and find out more about each company on the lead board. To do this, you simply have to click the company name.

It will redirect you to the lead record, which looks like this:
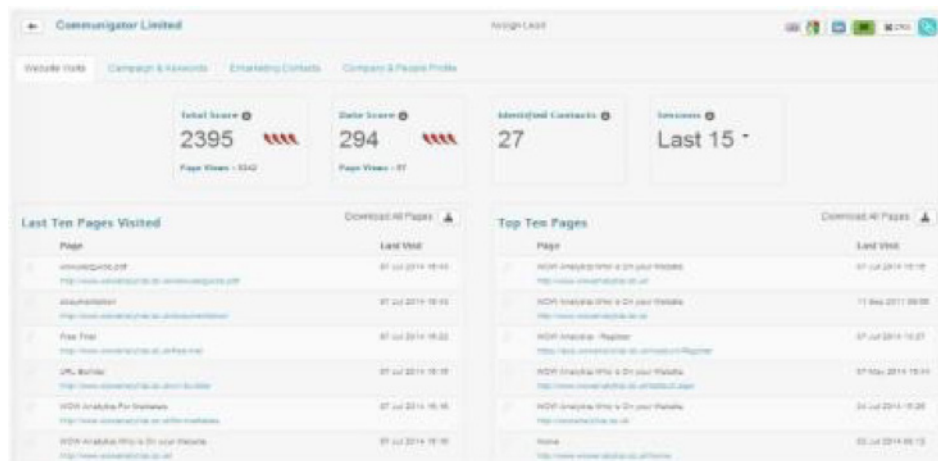
Website visits tab

This page will tell you:

• The lead's total score and pages viewed since being tracked by GatorLeads
• If you've picked a certain date range, it will show that score and page views for that timeframe
• The number of identified contacts in the com pany
• A filter to see the last 15 sessions the lead viewed (you can change this by clicking on the session dropdown menu)
• The last 60 days of web activity on your site
• The top pages the company has visited on your website
• Export options to download all the pages the company has visited on your website

Campaign & keywords tab

The next tab is the campaign and keywords tab. It will tell you:
• The campaigns your lead has come from (from any source using UTM values)
• Any keywords they used to get to your website (including PPC)
• Where they came from (search engines)
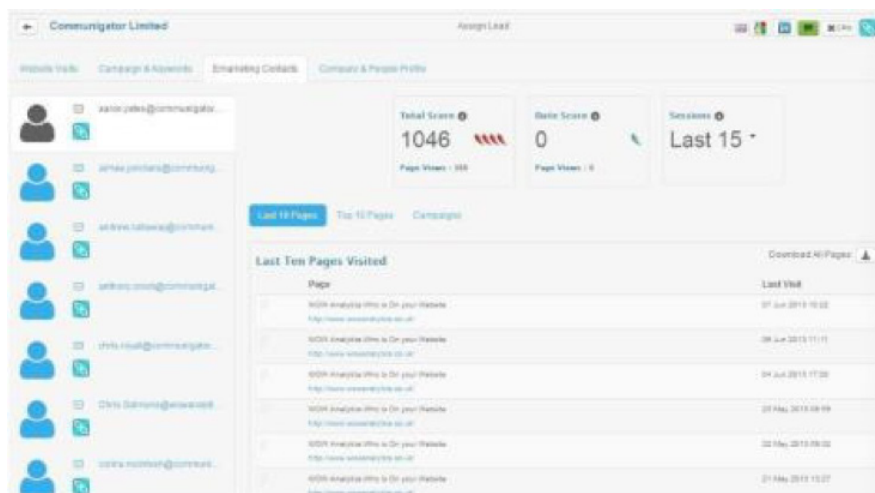• Any PURLs they have come from… We'll get to that later in the guide!

Emarketing contacts tab

The next tab is the emarketing contacts tab. It is exactly the same as the website visit tab above, except it will show you the information from each individual contact GatorLeads has identified within that com pany by using Communigator's tracking technology.

Simply click on each contact on the left to see their information on the right. The icons within the contact area allow you to (from left to right):

• Open the contact's details in a new window
• Create a PURL for the contact (covered in step 10)
• Nurture the contact (covered in step 10)
• Get their contact information

Company & people profile tab

The final tab, Company & People Profile, shows you:
• The company's revenue figure
• The number of employees
• The company's total score and pages viewed since being tracked by GatorLeads
• If you've picked a certain date range it will show that score and page views for that timeframe
• The company's address(es)
• The industry sectors they work in
• A description of the company
• The people in the company
   o Filter by management level or job function
   o Buy their email address if available
   o Create a PURL for each individual
   o Put each individual in a nurture campaign
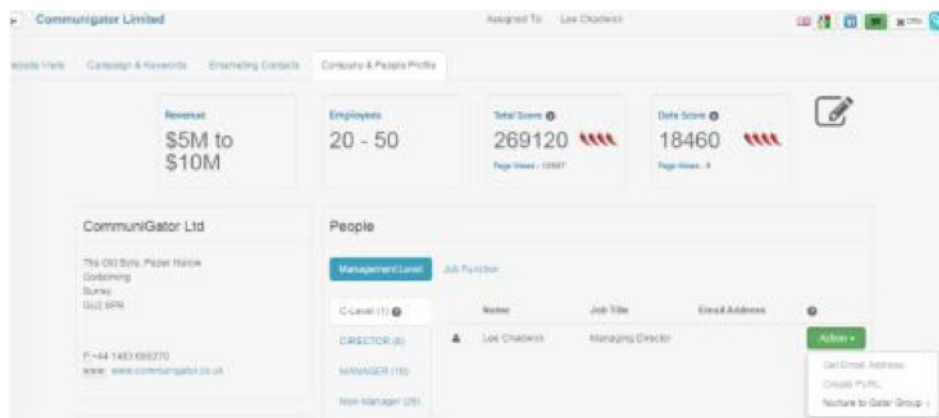
Step 3: Find out where your leads came from

One of the great things about the GatorLeads platform is it works for both sales and marketing. The reports and insights is really useful for you to track which campaigns leads are coming from, where leads are converting and anything else you need to know.

Insights

The first option in the drop-down menu of Reporting is Insights. This section is a great way to find out more about the companies that have been on your website.

In this section you can review which traffic sources, industries, locations and company sizes are the most popular and profitable for you. This gives you a great indication of what channels are the most successful and who your ideal target audience actually IS. From there you can also decide which sections need more attention.

On this page, you can also click on any of the rows in the tables to drill down and get even more information about that particular subject.

For example, I could select "Software" in Industries and then find out exactly where the traffic sources just for software industries cam e from. Or I could click into the PPC traffic medium channel to identify previously unknown visitors.

Reports

You'll find the reports in the drop-down menu of the top menu bar where 'Reporting' is.

From here you can create manual reports based on:

Simply select the box for the report you would like to create and then the date range. It should be created for. After you press the email report button, the report will be sent to your email address.

PPC campaigns

You can also see which leads your PPC campaigns are bringing in by running a specific PPC report too. Just go to Reporting – Reports – PPC Reports.

From there pick a specific date range, click the PPC Report button and you'll see a screen that looks similar to this:

This page will show you:

• The companies who have come from PPC campaigns
• When they first visited
• The landing page the PPC ad took them to
• The source of the campaign
• The keyword they used
• The PPC campaign they clicked on
• Whether the content/keyword they searched was broad 'b', exact 'e' or a phrase 'p'
• Plus a link to the lead table, so you can access their company record

Site analytics

The site analytics section on your GatorLeads platform is a great way to see graphs of your traffic's behavior.
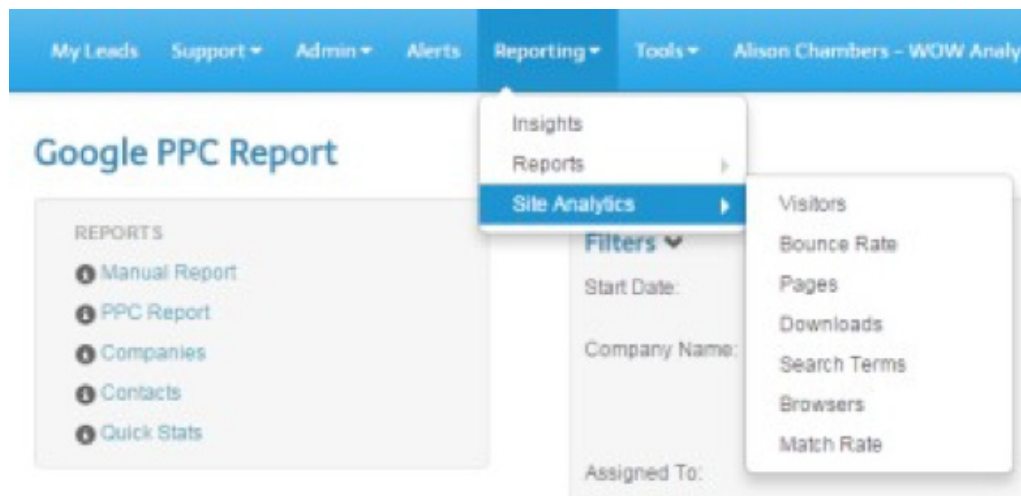
Visitors – The visitor's page will show you your unique visitors per day and per month. Note: this includes the traffic that GatorLeads couldn't identify as leads.

Bounce Rate – This page shows you the daily and an average monthly bounce rate, as well as an overall percentage of your traffic that is leaving your website after only viewing one page.

Pages – This will show you how many individual page views each of your pages/page categories has had. You can also break these page views down into a date range of your choosing.

Downloads – This will show you how many individual page views each of your downloadable content sources has had. Again, you can break these page views down into a date range of your choosing.

Search Terms – This page shows you which search terms have been used and how much traffic has come to your website from these search terms. You'll also have a pie chart of the top 5 search terms and can filter the terms by a date range of your choosing.

Browsers – This page will show you which browsers your visitors used and exactly how many of them came from that particular browser. You'll also have a pie chart showing the percentages of the browsers being used to get to your website and, again, you can filter the browser usage by a date range of your choosing.

Match rate – This page will show your daily and average monthly match rate of the leads identified on your website from GatorLeads. You'll also see the match rate of this week, last week and when your best match rate week occurred.

Please note, these figures will differ slightly from what you see on Google Analytics. This is because they are based on the companies that GatorLeads has been able to name, rather than ALL the anonymous data Google Analytics reports on.

Step 4: What to do with your leads on GatorLeads

Once you've found out who your leads are and the individuals from that company, you can start getting in contact with them to build up your relationship.

Purchase email addresses
If their email address did not appear on the lead table, you will need to click the purple 'Get Contacts' button. You will then be redirected to the Company and People Profile.
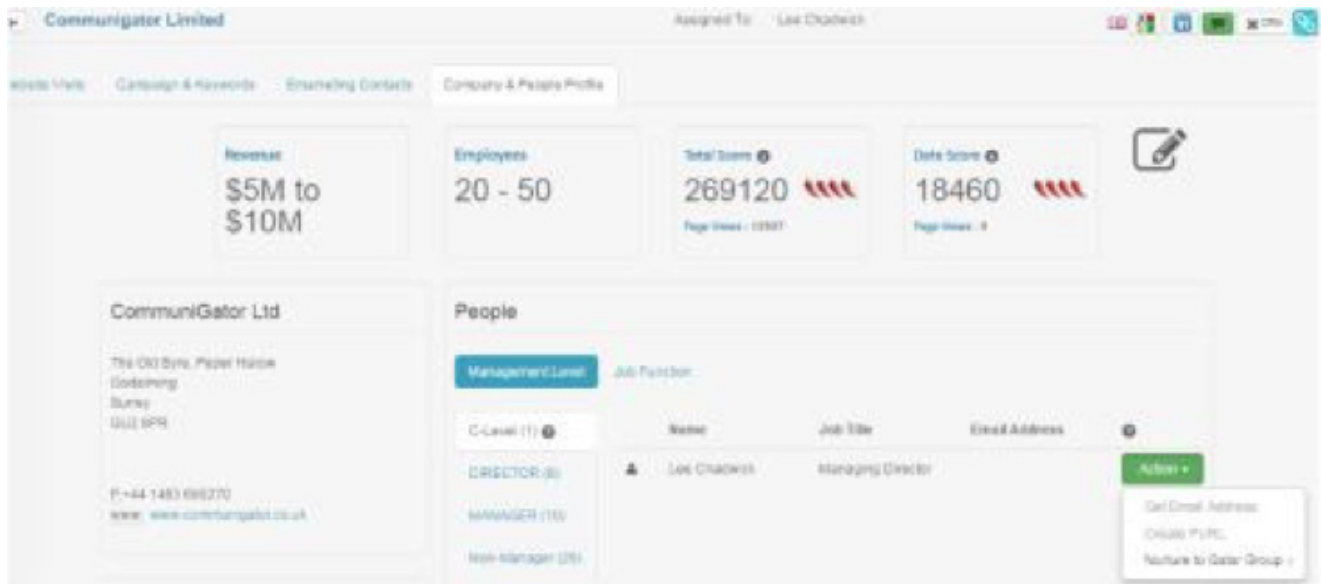
The green action button will show you if GatorLeads has the email address available to track. Or you may need to purchase email credits (each address costs 50p to buy) in order to get access to their email address. Ask your account manager for more details on pricing and how many credits you can buy.

Creating a PURL

Once you have your lead's email address, you can send them a PURL (personalised URL) to track their activity on your website.

What is a PURL?

A personal URL (PURL) is a unique shortened URL created specifically for a single person. It will allow GatorLeads to track the individual contact rather than just their com pany. As a 1 to 1 web link you could use this in a personal outlook style email to alert you when your contact has visited the supplied link.
As a unique additional feature, you can add a PDF link so you will know when your contact downloads the file. GatorLeads will alert you automatically once the download has happened.

How a PURL works

PURLs work by serving cookies, which you've probably heard of before. Cookies are saved onto the visitors com puter so that GatorLeads can recognise them next time they com e back to the site. So when you put this personalised URL in your email and your lead clicks it, GatorLeads will track their activity on your website and any subsequent visits to your site at the individual level.

This contact will then also show up as an emarketing contact within the com pany lead record and contacts page so you can put them in an email marketing campaign.

Why you should use PURLs

Using PURLs in your 1-to-1 email is a great way to see if the content you are providing in your emails is something your lead is interested in.

Then, when they have clicked on your PURL, you'll then be able to see where they go on your website (as long as your URL links to somewhere on your website).

Alternatively, if your PURL is a PDF link, you'll be able to know when they download the file because GatorLeads will alert you as soon as the download is com plete.

As soon as the PURL is clicked, GatorLeads will also be able to cookie the individual and then track their movements on your website and any subsequent visits to your website.

This is a great tool for sales to use as they can use PURLs tracking tool to see what their lead is interested in. From there they can create a tailored sales pitch that focuses on what they know their lead has looked at.

It also gives marketing a great insight into which content is converting leads and driving them through the sales process. It also helps them track the website user journey and how effective it is. This allows them to know which pages are successfully converting traffic or which pages need a bit more attention.

How to create a PURL

To get to the PURL page, go to Tools – PURL – Create

Creating a PURL... continued
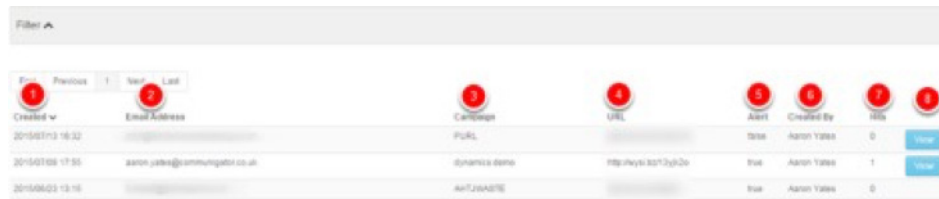
You'll see a page that looks like this:

Simply:

1. Enter the website that the PURL should direct to

2. Enter the email address of the person you are sending the PURL to

3. Enter the Campaign Name to identify and track specific cam paigns in GatorLeads. This name will add the utm value (cam paign name) to end of your URL string and allow you to monitor the individual's activity

4. Tick the box to get an email sent to you whenever the PURL is clicked

5. Click create the PURL and this will generate a URL for you to copy and paste to send to your contact to monitor the individual's activity.

IMPORTANT: PURLs are personalised URLs, which means you need to create a different PURL for each individual you wish to track. Don't click these links yourself, or GatorLeads will track YOUR activity as belonging to the person you are sending the PURL to!

Changing the history of your PURLs

On the PURL history page, you can see a number of details about every PURL you have set up.

This includes:

1. This is the date the PURL was created
2. This is the personal email address the PURL was sent to
3. This is the cam paign that will display in the UTM string and will allow you to filter within GatorLeads
4. This is the PURL that has been sent to the individual contact
5. This is whether an alert to yourself has been enabled
6. This is who created the PURL
7. This is how many hits the PURL has had
8. This allows you to view the contacts journey via a permalink

Nurturing your leads

Once you have a contact's email address, you can do more than just PURL them. You can also put them into a marketing automation process. Don't worry, you don't have to have marketing automation to do this! You can also do it in GatorLeads with GatorLeads's lead nurturing series.

GatorLeads's lead nurturing campaign is a 3 email series. We will build this campaign series for you, including the HTML design and make it adaptable, so it displays across a wide range of email providers and devices.

You can also choose how these emails are triggered, whether you want a 2 day delay between each message or a week.

If you are unsure about what to say or what will work best, we are happy to help. Just ask your Account Manager for more information.

Moving on to Marketing Automation

Once you start generating too many leads to track them with individual emails, we can upgrade you to our sister company, CommuniGator, to create you an email marketing platform. With this marketing automation, you can trigger emails based on a number of factors.

The trigger could come from:
• When your lead lands on a certain page
• When your lead builds up to a certain score
• When your lead downloads a whitepaper

Together with GatorLeads, this will be the fastest way to successfully warm up and convert all the qualified leads coming to your website.

About Communi**Gator**

CommuniGator is one of the leading marketing automation software providers in the UK.

Established in 2005, we've gone through a period of evolution as the marketing landscape has changed.

The core platform functionality caters to email marketing with automated welcome series, a HTML editor for designing your emails, templates, responsive design, dynamic groups based on behaviour, integration with the leading CRM platforms, an event management suite, robust reporting and so the list goes on.

On the marketing automation side we're able to track prospect activity across the web pages they visit on your website and the email content they consume and take action against. This means you can build up a really detailed profile of who has done what.

To read all the juicy details of what the platform offers and how we can help your business jump on over to our website: www.communigator.co.uk

Give us a call: +44 (0)1483 411 911

Our products and services include:

Marketing**Automation** I Gator**Mail** I Gator**Leads** I Gator**Events** I Gator**Docs**

Gator**Survey** I Gator**Social** I Gator**Data** I CRM **Integration** I Managed **Services**