

The B2B Conversion Tracking Checklist

The tracking work that decides whether your ad platforms optimize toward revenue or toward form fills. Work top to bottom. If a box can't be ticked, that's where your signal is leaking.

1 · FOUNDATIONS

- ☐ First-party data collection is live via a server-side GTM container, not just the browser pixel.
- ☐ Consent Mode v2 is configured so modeling continues when a visitor declines cookies.
- ☐ Event deduplication is in place (browser and server events share one event ID).
- ☐ A written tracking spec exists that your own team can audit, not a black box only the agency understands.

2 · DEFINE THE RIGHT CONVERSION

- ☐ Your primary conversion is pipeline or closed revenue, not a raw lead or free signup.
- ☐ Lead quality is graded (MQL / SQL / opportunity), not counted as one undifferentiated event.
- ☐ Micro-conversions (demo view, pricing visit) are tracked as secondary, never optimized to as primary.
- ☐ Each conversion carries a value, so a \$2K SMB signup and a \$200K enterprise deal aren't treated as equal.

3 · GOOGLE ADS

- ☐ Enhanced Conversions for Leads is enabled (hashed first-party data sent back on every lead).
- ☐ GCLID is captured on the form and stored against the record in your CRM.
- ☐ Offline Conversion Imports upload closed-won and pipeline stages back to Google on a schedule.
- ☐ Performance Max has a brand exclusion list so brand traffic isn't reported as prospecting.
- ☐ Smart bidding campaigns clear roughly 30 conversions per 30 days, or they've been consolidated until they do.

4 · META AND PAID SOCIAL

- ☐ Conversions API (CAPI) is live with correct event IDs and browser-to-server deduplication.
- ☐ Event Match Quality is monitored (misconfigured CAPI silently drops or double-counts 20 to 40% of signal).
- ☐ Customer lists and existing pipeline are excluded from prospecting audiences.

5 · CRM AND VALUE

- ☐ CRM stages (Salesforce or HubSpot) are mapped to conversion actions and dollar values.
- ☐ Value-based bidding is weighted by segment, deal size, and close probability.
- ☐ The feedback loop is closed: what actually closes is fed back to the platforms, not just what clicks.

6 · MEASUREMENT AND REPORTING

- ☐ Blended efficiency (MER) is reported alongside platform-reported ROAS.

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- ☐ Incrementality is tested with geo holdouts on channels where last-click is a fiction.
 - ☐ One board-ready view reconciles to the CRM, so a CFO accepts it without a caveat attached.

7 · QA BEFORE YOU TRUST IT

- ☐ Every conversion tag fired and verified in real time (Tag Assistant / test events), not assumed.
- ☐ No double counting across GA4, Google Ads, and the CRM.
- ☐ Reported conversions reconcile to actual closed-won within a known, explainable margin.

MOST ACCOUNTS FAIL ON SECTION 3

Enhanced conversions and offline imports are where the largest single lever usually sits. At one B2B client, wiring Google Ads enhanced conversions to pipeline data was the biggest driver in taking paid-driven ARR from \$3M to \$25M. If you tick nothing else on this list, start there.

Want a second set of eyes on your setup? Book a 30-minute teardown at adsbyjer.com/book.