

Estimator Analytics Tracking Plan

A complete analytics blueprint for your interactive estimator or calculator tool. Track the right events, measure your funnel, and feed qualified leads to your CRM.

1. CORE EVENTS TRACKING TABLE

Implement these events in your analytics tool (GA4, Mixpanel, Segment, etc). Every event needs a trigger and properties.

EVENT NAME	TRIGGER	PROPERTIES TO CAPTURE	PRIORITY
estimator_started	User begins first input	source, utm_params, device_type, referrer	🔴 P0
step_completed	User advances to next step	step_number, step_name, time_on_step, inputs_provided	🔴 P0
step_abandoned	User leaves mid-step (page unload)	last_step, time_on_step, inputs_so_far, total_time	🔴 P0
estimate_generated	Results page displayed	estimate_value, inputs_summary, completion_time	🔴 P0
cta_clicked	User clicks primary CTA on results	cta_type (call, email, form), estimate_value, step_count	🔴 P0
lead_captured	Contact form / gate submitted	email, name, estimate_value, consent_given	🔴 P0
estimate_shared	User clicks share/download/print	share_method, estimate_value	🟡 P1
input_changed	User modifies an input (debounced)	field_name, old_value, new_value, step	🟡 P1
estimate_recalculated	User returns to edit and regenerates	previous_value, new_value, changed_inputs	🟡 P1

2. FUNNEL BENCHMARKS

Set targets before launch. Review weekly for the first 30 days, then monthly.

FUNNEL STAGE	TARGET RATE	ACTUAL RATE	HOW TO IMPROVE IF BELOW TARGET
Page Visit → Started	40-60%		Simplify first step, improve above-fold copy
Started → Completed	60-80%		Reduce steps, add progress bar, save state
Completed → CTA Click	20-40%		Improve results page, stronger value prop
CTA Click → Lead Captured	30-50%		Reduce form fields, add social proof
Lead → Qualified Opportunity	15-30%		Better qualifying questions in estimator

💡 The biggest drop-off is usually Step 1 → Step 2. If your start rate is below 40%, the problem is UX or copy, not the estimator logic.

3. SESSION RECORDING CHECKLIST

Use Hotjar, FullStory, or similar. Watch 10-20 sessions per week for the first month. Here's what to look for:

WATCH FOR

- ☐ Hesitation on specific fields (>10s hover)
- ☐ Rage clicks (rapid repeated clicks)
- ☐ Back-and-forth between steps
- ☐ Scroll past important elements
- ☐ Abandonment right before submit

LOG FINDINGS

- ☐ Which step has most confusion?
- ☐ Are users reading helper text?
- ☐ Mobile vs. desktop behavior differences?
- ☐ Do users trust the results? (scroll pattern)
- ☐ What do they do AFTER seeing results?

4. CRM INTEGRATION SPEC

Every lead from the estimator should flow into your CRM with full context. No one wants to call a lead and ask "so what were you looking at?"

Fields to Pass to CRM

CRM FIELD	SOURCE	EXAMPLE VALUE	REQUIRED?
Contact Email	Lead capture form	jane@company.com	<input checked="" type="checkbox"/>
Contact Name	Lead capture form	Jane Smith	<input checked="" type="checkbox"/>
Estimate Value	estimate_generated event	\$12,500	<input checked="" type="checkbox"/>
Inputs Summary	All step data (JSON)	{sqft: 2000, rooms: 4...}	<input checked="" type="checkbox"/>
Lead Source	UTM parameters	google / cpc / estimator	<input checked="" type="checkbox"/>
Completion Time	estimator_started → lead_captured	3m 42s	<input type="checkbox"/>
Steps Completed	step_completed count	5/5	<input type="checkbox"/>

Automation Workflows to Build

- ☐ **Instant email** — send estimate summary PDF within 60 seconds of submission
- ☐ **Sales notification** — alert assigned rep with lead context for estimates > \$_____
- ☐ **Nurture sequence** — 3-email drip for leads who don't convert within 48h
- ☐ **Lead scoring** — auto-score based on estimate value + engagement signals
- ☐ **Re-engagement** — trigger email for abandoned estimators with >50% completion

5. 30-DAY DASHBOARD — VIEWS TO BUILD

Set these up before launch. If you can't see it, you can't improve it.

#	DASHBOARD VIEW	WHAT IT SHOWS	TOOL
1	Funnel Overview	Visit → Start → Complete → Lead conversion rates	GA4 / Mixpanel
2	Step Drop-off	Completion rate per step — find the leak	GA4 / Mixpanel
3	Traffic Sources	Which channels drive completions (not just visits)	GA4 / UTM report
4	Estimate Distribution	Histogram of estimate values — spot outliers	Custom / Looker
5	Lead Quality	Estimator leads vs. other leads: close rate, deal size	CRM reports

