Conversion mastery: Tracking, goals & Performance Max essentials

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Microsoft Advertising

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Today’s presenters

Stein Broeder

Senior Events Manager

Microsoft Advertising

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Microsoft Advertising

Today's agenda…

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Universal Event Tracking

2

Performance Max

3

Q&A

Mastering Conversion Setup

Step-by-step guide to efficient and accurate conversion tracking

Microsoft Advertising

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- Consent mode and transparency consent framework

Business strategy with purpose-driven goals

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- Offline conversion
- API conversion
- Automated bid strategies

Setting you up for success

Unlock the potential of your search ads with our tracking and optimization solutions. We want to ensure you are set up with precise tracking tags to capture every click and conversion, giving you unparalleled insights.

Optimize your campaigns with sophisticated bid strategies resulting in best return of investment, capturing both online and offline conversions for a complete view of your campaigns performance.

Better tracking

Leveraging our Universal Event Tracking (UET) tags, track the impact of your campaigns across your online channels.

Save time and maximize ad spend

With Automated bid strategies giving you control and flexible offerings to optimize campaign performance.

Better ROI

Make campaign optimizations based on the full impact of your search ads.

Mastering Tracking Tags - Set up

Why UET

Setting up your UET tag

Validate your clients UET tag setup

Consent mode and transparency consent framework

Universal Event Tracking

Track what your customers are doing after they click on your ad. Universal Event Tracking (UET) is a powerful tool that records what customers do on your website. By creating one UET tag and placing it across your website, Microsoft Advertising will collect data that allows you to track conversion goals and target audiences with remarketing lists.

Why UET is critical for advertisers on Microsoft

Make the most of your Microsoft Advertising investments with UET and all the benefits it enables for your business.

More data fidelity and signals

Providing as many intelligent signals as possible allows you to get the best and most informed picture of your advertising, empowering you to make the right decisions for your business.

Less work for you in the future

For privacy landscape, and with any of Microsoft's upcoming solutions, Microsoft will ensure that UET evolves accordingly to easily set you up for the future.

The full menu of benefits unlocked with UET

Conversion tracking

Online goals

Opportunities

E-commerce and engagement goals

Hotel Ads

conversion tracking

Automated bidding

Maximize Conversions

Target CPA

Enhanced CPC

Target ROAS

Audience targeting

Remarketing

Dynamic Remarketing

Similar Audiences

Custom

Combination Lists

Smart Remarketing

Campaign performance

Ad performance

Broad matching

Search partner network

Smart pricing

New analytics and targeting

Cookieproof for the future

MSCLKID for conversion tracking

Integrated with Privacy Sandbox for targeting

*We recommend sitewide tagging of JavaScript UET. No iFrames.

When setting up your UET tag

These actions can help you track conversions more accurately, improve your ad performance and prepare your website for important new ad features.

1

Use JavaScript UET tag.

Providing as many intelligent signals as possible allows you to get the best and most informed picture of your advertising, empowering you to make the right decisions for your business.

2

Use sitewide tagging.

Add the UET tag to all your webpages and domains, especially the pages where conversion actions are happening (e.g. purchase confirmation page load)

*We recommend sitewide tagging of JavaScript UET. No iFrames.

Everything you need to know about setting up UET

Create a UET tag

Create a UET tag in Microsoft Advertising platform

Add the tag to your website

Add the tracking code to every page of your website

Modify your tag to enable additional features

Unlock additional features that brings value to your business (such as custom events)

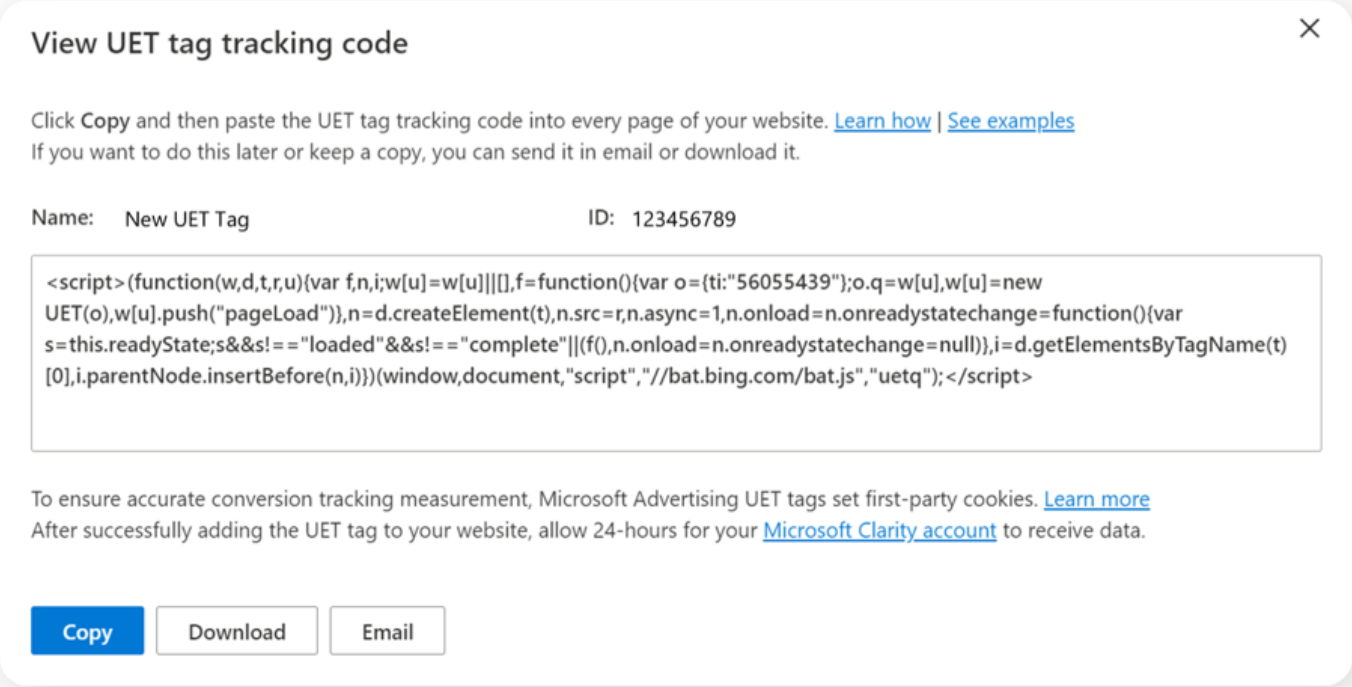
Verify your tag is working and troubleshoot issues

Ensure your UET tag is working properly on any given webpage with our UET tag helper or our UET dashboard on Microsoft Advertising Platform

Create a UET tag

Create a UET tag in Microsoft Advertising, then add the UET tag tracking to every page of your website. Learn more from on our UET tag guide.

1. From the navigation menu on the left, hover over **Conversions** and select **UET tag**.
2. Select **Create UET** tag and then enter a name.
   - Optional: Enter a description that helps you identify the UET tag in the future. This could relate to the purpose the tag will serve or to the name or URL of your website.
   - Optional: Clear the **Enable Microsoft Clarity** checkbox. Learn more about UET and Clarity integration.
3. Select **Save**.
4. In the **View UET tag tracking code** box, select either **Copy, Download,** or **Email**, and then close the **View UET tag tracking code** box.



Add the tag to your website

The next step is to add the UET tag tracking code to your website. You can either add the UET tag tracking code directly into your website's code using JavaScript or use a third-party tag manager. Additionally, if your website was built on a website platform (such as Shopify or WordPress), you can use that system to add your UET tag.

Add UET code to your website directly

Paste the UET tag tracking code on every page of your website, either in the head or body section.

Note: before the closing head tag: "</head>") or body section (before the closing body tag: "</body>"

Add UET using a tag manager

UET works with all major tag management systems. Here is the current list of (and links to instructions for) tested and supported tag managers:

- Google Tag Manager
- Qubit Opentag
- Tealium
- Ensighten
- Signal
- Adobe Dynamic Tag Manager
- Adobe Experience Platform

Add UET using website platform

UET is designed to work with all major website platforms. Here is the current list of (and links to instructions for) tested and supported platforms that allow you to install UET tags:

- BigCommerce
- Shopify
- WordPress.com
- Wix

Modify your tag to enable additional features

Some targeting and tracking features require you to modify your UET tag. The instructions below assume that you have already created a UET tag and added it to your website.

Custom events

Example of custom events include track people selecting a “download now” button on one of your webpages

Custom e-commerce events

How users interact with the products and services you sell on your ecommerce website

Example include “add to cart” capturing total sales price or revenue

Variable revenue

Each action a customer take whether its making a purchase of signing up for rewards brings a different value to your business. You can custom specific revenue value to each of your conversion goal to track your return on investment

Dynamic remarketing

Dynamic remarketing lists pair customer with specific product based on what they have looked at, considered or already purchased on your website

Multiple features

Combine multiple features that brings value to your business (additional steps to combine)

Enhanced conversions

Supplement existing conversion tracking by using first-party data.

more info

Verify your tag is working and troubleshoot issues

UET Tag Helper is a browser extension used to validate that both the Microsoft Advertising UET tag and the conversion goals are working properly on any given webpage.

Set up UET Tag Helper

- Download the UET Tag Helper in Edge.
- Select **Get**, and then **Add extension**. By installing the UET Tag Helper, you agree to the Microsoft Service Agreement and Microsoft Privacy Statement.
- Once installed, you will see the UET Tag Helper icon in Edge.

Validate UET tags

- In Edge, go to a webpage that you want to check, and then select the UET Tag Helper icon.
- In UET Tag Helper, flip the toggle **On**, and then refresh the browser page.
- Review the UET Tag Helper icon status. The color of the badge shows the status, and the number in the badge shows how many times there was a UET tag request from the webpage.

UET Dashboard

UET Dashboard, available for each of your tags, enables you to test your tag, access an Overview of the UET tag, and UET Insights. It gives you deeper insights into your website visitors and their actions. From the navigation menu on the left:

- From Conversions choose UET tag.
- Select the Test tab.
- Enter the URL for your website.

UET and User Consent

UET Microsoft Advertising requires advertisers using our Universal Event Tag (UET) to provide user consent signals where data privacy laws require consent as a lawful basis for processing personal data and/or for activating the UET tag. Advertisers can do this by implementing on their websites either:

- Consent Mode for UET

or

- the IAB's Transparency and Consent Framework (TCF)

This ensures that Microsoft Advertising will only collect and process end users' data through UET in line with their wishes, i.e., when they have given their consent. This also ensures compliance with the applicable terms of service, regulations and industry best practices.

If you implement Consent Mode for UET or the TCF, you will maintain accurate conversion tracking, retargeting, and other essential campaign features.

Note: If you are using the UET - Clarity integration, you must set the consent setting for Clarity separately. Learn more about Clarity cookie consent.

How consent mode works

Consent Mode is set via a property in UET called *ad_storage*. The possible values for *ad_storage* are:

If ad_storage = 'granted'

- Cookies pertaining to advertising may be read and written in the 1st party (advertiser domain) or 3rd party context (bing.com).

If ad_storage = 'denied'

- Write or read 1st party cookies (advertiser domain) — no ads cookies are written or read by UET when the user is on that advertiser website.
- Write 3rd party cookies (bing.com domain) — no ads cookies are written by UET when the user is on that advertiser website.
- Read 3rd party cookies (bing.com domain) — Microsoft 3rd party cookies are not read for advertising purposes; Microsoft 3rd party cookies are read for fraud and spam purposes, only.

More details on Setting up UET for Consent Mode and if you are using Google Tag Manager refer to consent mode with Google Tag Manager

Note: ad_storage will be denied by default in European Economic Area (EEA), United Kingdom (UK) and Switzerland (CH)

Power Your Business Strategy With Purpose-driven Goals

Conversion goals

Offline conversion

API conversion

Automated bid strategies

Goal categories for organizing your conversion goal objectives

Conversion type	Sales categories	Leads categories	Other categories
Website	Purchase	Submit lead form	Contact
	Add to cart	Book appointment	Page view
	Being checkout	Sign-up	Other
	Subscribe	Request quote	
		Get directions	
		Outbound click	
Mobile app install			Download
Offline	Purchase	Submit lead form	Contact
	Add to cart	Book appointment	Page view
	Begin checkout	Sign-up	Store visit
	Subscribe	Request quote	Other
		Get directions	
		Outbound click	

Use goal categories to segment your goals and their performance metrics in a way that is meaningful to your business. Goal categories don't affect performance—they are here to help keep your conversion goals organized

More information can be found on our help page

Conversion goals and goal types

Conversion goals allow you to specify which actions to count as conversions, as recorded by UET

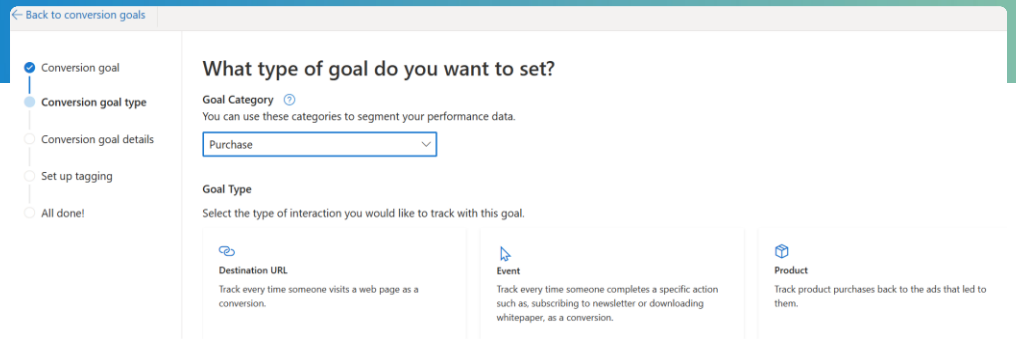
Goal type	Conversion goal	Example
Website	**Destination URL:** Count user visits to specific webpages as conversions.	Confirmation page after purchase, Thank you page after lead generation
	Event: Count every time someone completes a specific action--such as signing up for a newsletter or downloading a document--as a conversion.	
	Duration: Count every time someone stays on a website for longer than a certain amount of time as a conversion.	10 minutes or longer spent on a blog or playing a game on the webpage.
	Pages viewed per visit: Count every time someone visits more than a specified number of pages on your website as a conversion.	5 pages viewed on a support site or product catalog.
	Product: Count every time a product is purchased via an ad click.	An ad click leads to an online purchase of a specific product.
Mobile app install	**Mobile app install:** Count every time someone installs your app as a conversion. To learn more, see Track mobile app installs as conversions.	Installation of your app on Android devices.
Offline	**Offline conversion:** Track when your ad leads to a conversion outside of your website. To learn more, see Tracking offline conversions.	A search ad leads to an over-the-phone purchase.
	Store visits: Count every time a user visits a store as a conversion.	A search ad leads to a store visit.
	In-store transactions: Count every time a transaction occurs in your store.	A search ad leads to an in-store purchase.

UET tag on your website can track multiple types of conversions. Once the UET tag tracking code is added to your website, Microsoft Advertising can log page visits and any custom events (such as document downloads, signups for a newsletter, etc.).

More information can be found on our help page

Creating a conversion goal

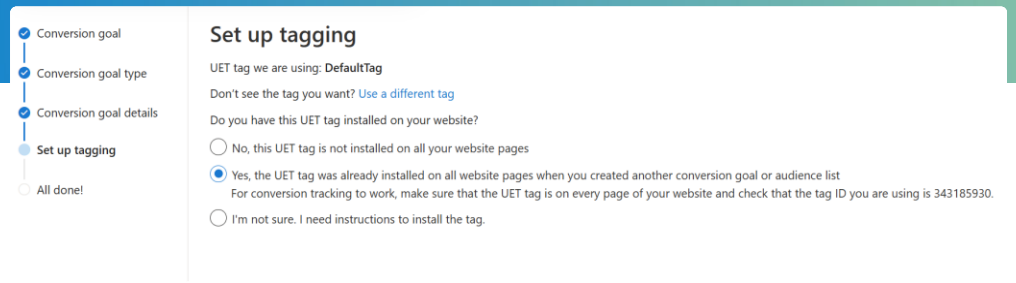
To track actions people, take on your website after they click on your ad



- From the navigation menu on the left, hover over **Conversions** and select **Conversion goals**.
- Select **Create**.
- Choose the type of conversion you want to track: **Website**, **Mobile app install**, or **Offline**.
- Select **Next**.
- Choose a goal category from the dropdown menu and then choose a goal type.
- Enter a name for your goal in the **Goal name** box. When naming your goal, use a descriptive name that makes sense to you. (For example, "Checkout page".) Please note that after you choose a name for your conversion goal, the same name may not be used again in the future.
- Fill in the appropriate values for your selected goal type.
- If you want to add a monetary value for each conversion, select one of the following from the **Revenue**, dropdown menu:
    - **Each conversion action has the same value**, and then enter the amount and select the currency (if available). This is a static revenue value that doesn't change.
    - **Conversion action value may vary (for instance, by purchase price)**, and then enter the default amount and select the default currency (if available) to be used when no value is received for a conversion. The revenue value will change based on the customization you make to the UET tag tracking code that you add to your website. To learn more, see How to report variable revenue with UET. This option is only available for destination URL and event conversion goals.

Creating a conversion goal (cont.)

To track actions people, take on your website after they click on your ad



- Fine-tune your conversion goal with **Advanced settings**:
  - Set the **Scope** of this goal to all accounts or a specific account.
  - Change how you **Count** your conversions. Learn more.
  - Enter a **Conversion window** to track up to 90 days in the past.
  - Set a **View-through conversion window** to track conversions that occur in this period of time after a customer views (but doesn't click) your ad. Learn more about view-through conversions.
  - Check or clear the **Include in "Conversions"** checkbox depending on whether or not you want to track all conversions. Learn more about "Conversions" versus "All conversions".
- Select **Next**.
- Select the UET tag that you want to associate with this conversion goal (not applicable to offline conversions).
- Choose an answer for **Do you have this UET tag installed on your website?**
- Select **Save and next**.

Why am I not recording conversions or tracked revenue?

Follow this troubleshooter:

Has it been more than 24 hours since you set up this UET tag or this conversion goal?

It can take up to 24 hours for Microsoft Advertising to receive data from a new UET tag or conversion goal. Wait until 24 hours have passed and check again.

What is your conversion goal's tracking status?

From the navigation menu on the left, hover over Conversions and select Conversion goals. and check the Tracking status column for this conversion goal.

- Tracking status is "Unverified" or "Tag inactive": Follow the steps in next section of this article.
- Tracking status is "No recent conversions": Follow the steps in this section of the article.

Have you added the UET tag to your website's code?

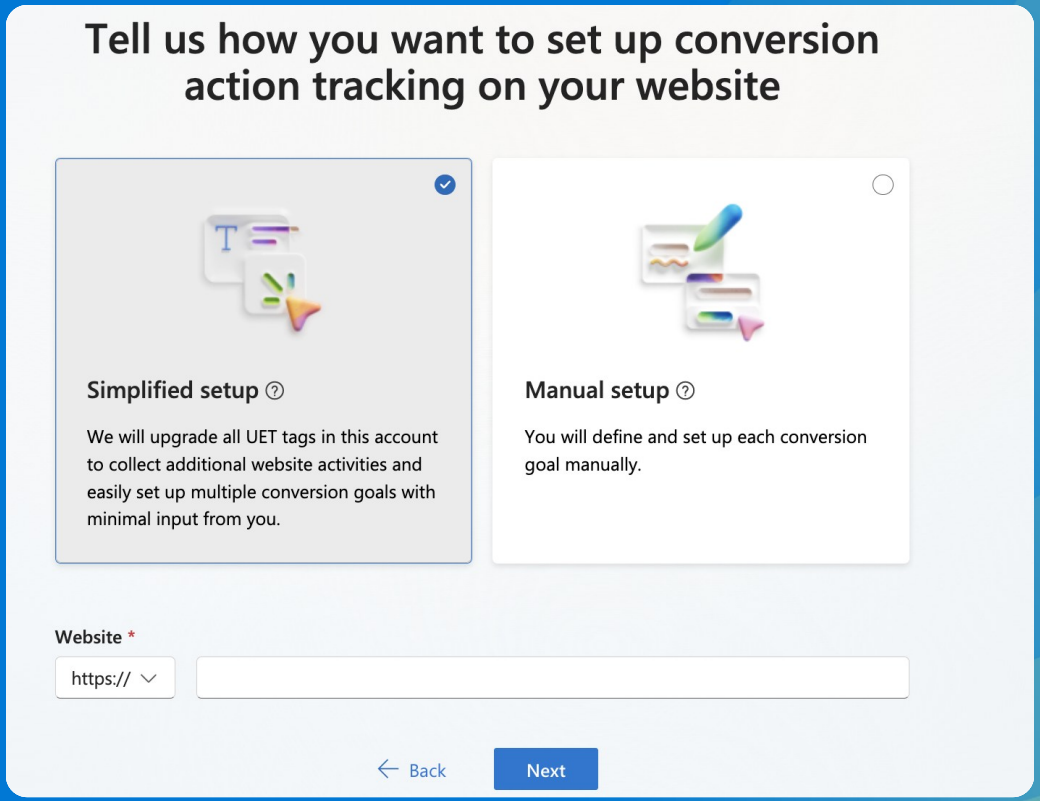
No	Your UET tag must be inserted into the code of each page of your website for conversion tracking to work. For instructions, refer to the "Add the tag to your website" section of this article.
Yes	There are three likely scenarios: You didn't add the UET tag to every page of your website. You didn't add the UET tag correctly. You added the wrong UET tag.

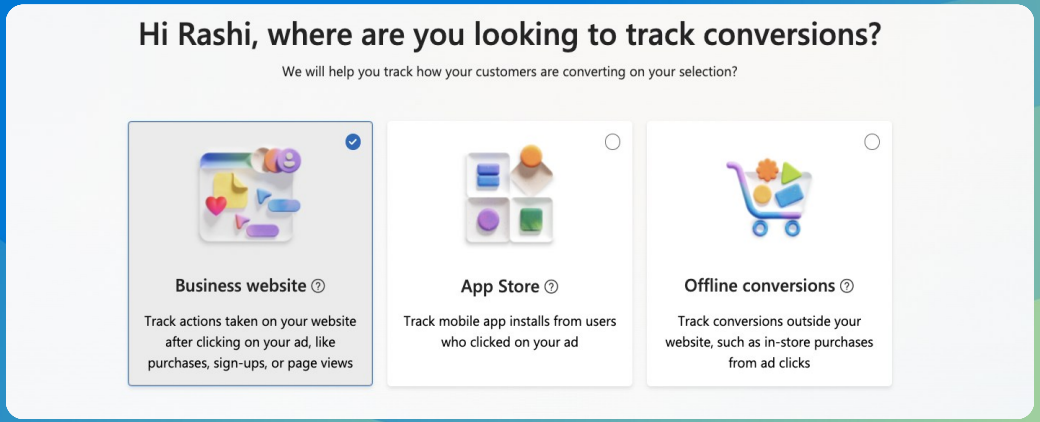
With simplified setup of conversion goals, you can select events of interest, automatically detect those events on your website, and suggest which ones to track as conversions.

This **eliminates the need for selecting events manually** and **simplifies your workflow** since you will not need to use code for any configuration. Button clicks, page visits, purchases, checkouts, and subscriptions can all be detected.

To use simplified setup of conversion goals, you only need to set up a UET tag on your website, and review and accept the automatically detected events that you'd like to track as conversions.

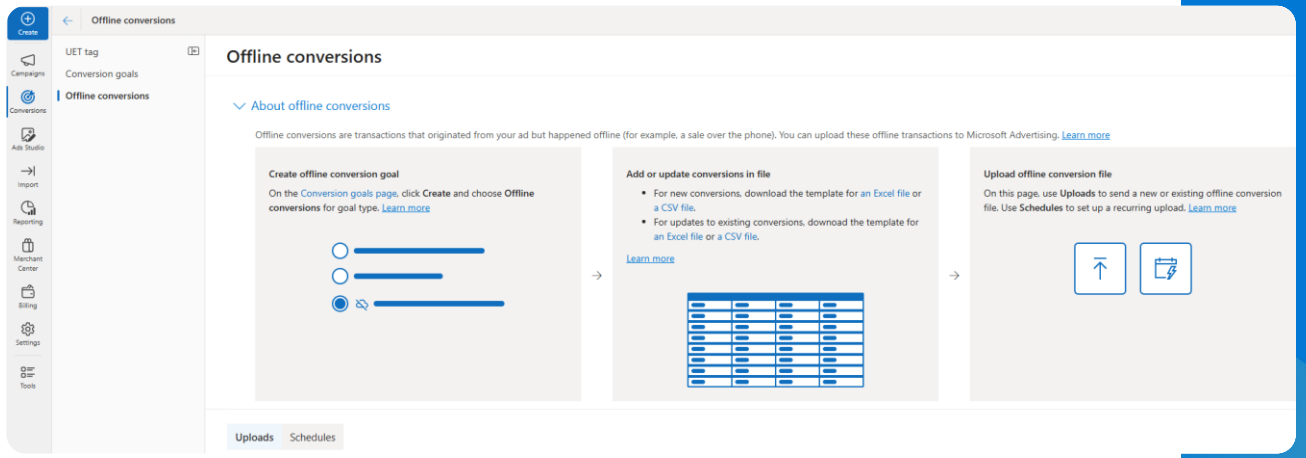
Learn more about setting up a UET tag.





Getting started with offline conversion import

Import offline conversions to better measure what happens after your ad was clicked



Better tracking.

You can track the impact of your campaigns for both online and offline channels.

Easy importing.

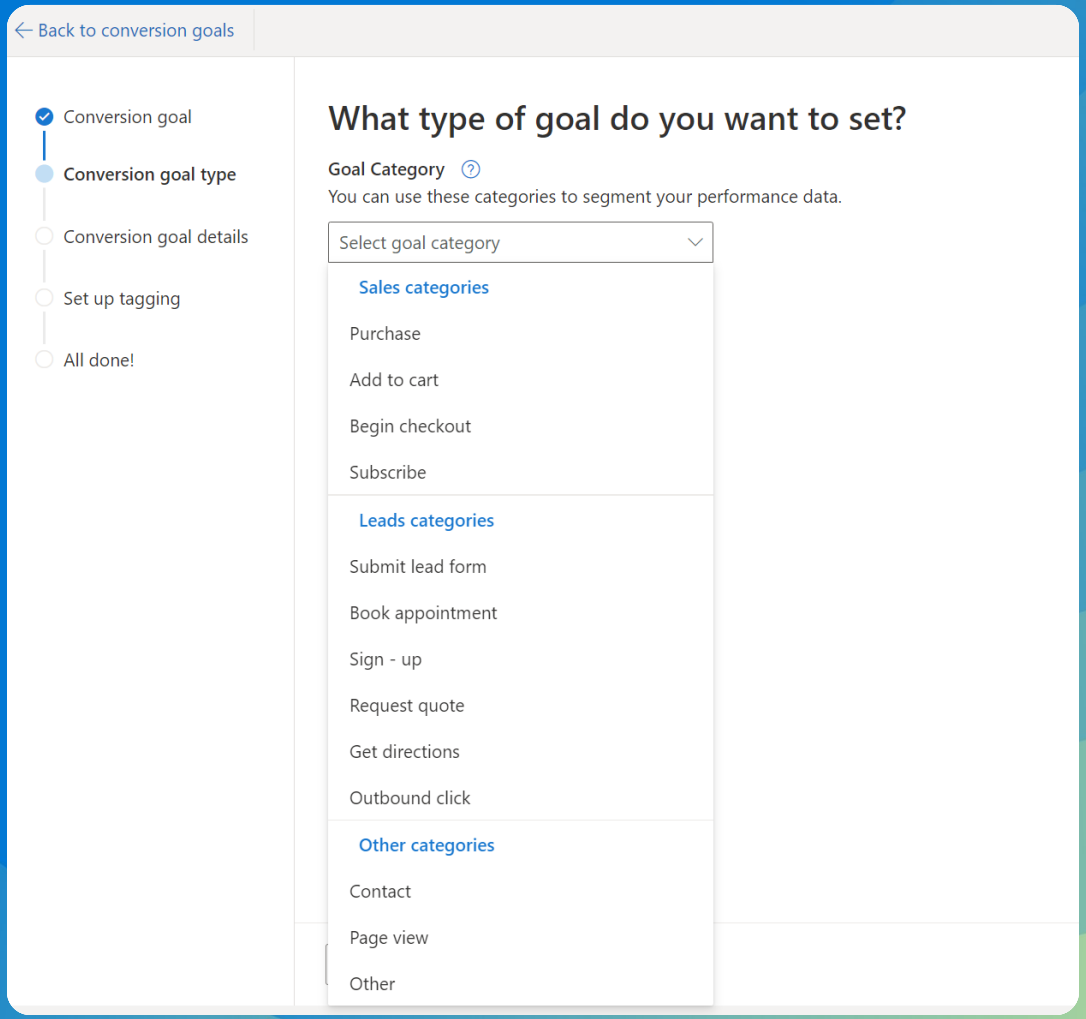
All you need are the time, date, Microsoft Click ID, and conversion goal name to get started.

Better ROI.

You can optimize your campaigns based on the full online and offline impact of your search ads.

Getting started– create a new offline goal

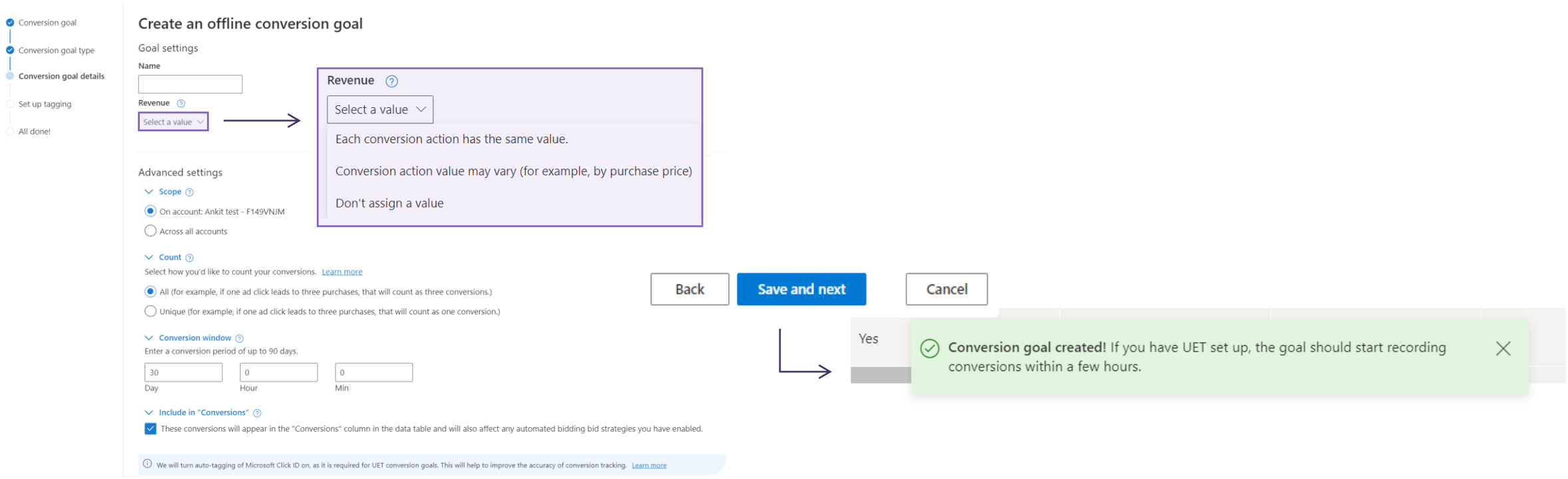
Assign a category to your conversion goal as a means of segmenting conversion goals and their performance metrics.



Getting started– create a new offline goal

Select your revenue value, conversion counting and conversion window.

Offline conversion goals can be set up on any single account level or 'across all accounts'.



Add offline conversions later

Import and schedule your offline conversions anytime by going to the offline conversions page.

Offline conversions

About offline conversions

Offline conversions are transactions that originated from your ad but happened offline (for example, a sale over the phone). You can upload these offline transactions to Microsoft Advertising. Learn more

Create offline conversion goal

On the Conversion goals page, click **Create** and choose **Offline conversions** for goal type. Learn more

Add or update conversions in file

- For new conversions, download the template for an Excel file or a CSV file.
- For updates to existing conversions, downoad the template for an Excel file or a CSV file.

Learn more

Upload offline conversion file

On this page, use **Uploads** to send a new or existing offline conversion file. Use **Schedules** to set up a recurring upload. Learn more

Uploads Schedules

Upload offline conversions

- Upload new conversions

Download the Excel (.xlsx) template or the .csv template.

- Update existing offline conversions (using Microsoft Click ID)

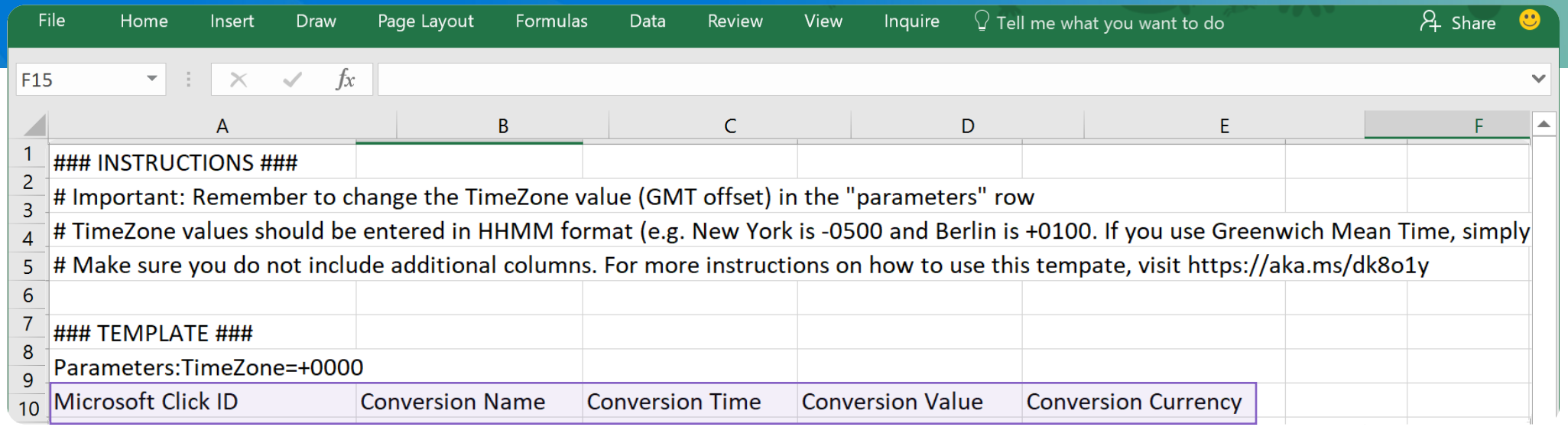
Update the values of previously uploaded conversions or remove them entirely. Download the Excel (.xlsx) template or the .csv template.

Browse...

Note: After creating a new offline conversion goal, please wait 2 hours before uploading conversions for this goal.

Upload and preview Cancel

Use the Excel import template



Microsoft Click ID	Conversion Name	Conversion Time	Conversion Value	Conversion Currency
The msclkid led to the conversion	Same as the conversion goal (case insensitive)	The date and time that the conversion occurred	(Optional) Non-negative, 0 to 999999999999 with 3 decimal fields	(Optional) The currency in which the conversion value is provided

Getting started– use the Excel import template

Format	Examples (Time zone values from this list)
MM/dd/yyyy hh:mm:ss aa	"08/14/2012 5:01:54 PM"
MMM dd,yyyy hh:mm:ss aa	"Aug 14, 2012 5:01:54 PM"
MM/dd/yyyy HH:mm:ss	"08/14/2012 17:01:54"
yyyy-MM-dd HH:mm:ss	"2012-08-14 13:00:00"
yyyy-MM-ddTHH:mm:ss	"2012-08-14T13:00:00"
yyyy-MM-dd HH:mm:ss+z	"2012-08-14 13:00:00+0500"
yyyy-MM-ddTHH:mm:ss+z	"2012-08-14T13:00:00-0100"
yyyy-MM-dd HH:mm:ss zzzz	"2012-08-14 13:00:00 EasternTimeUSCanada"
yyyy-MM-ddTHH:mm:ss zzzz	"2012-08-14T13:00:00 EasternTimeUSCanada"

TimeZone information is required and can be entered in two places:

01 Enter GMT offset in the TimeZone file which applies to all conversions in the file.

02 Add a TimeZone to the conversion time (GMT or TimeZone ID).

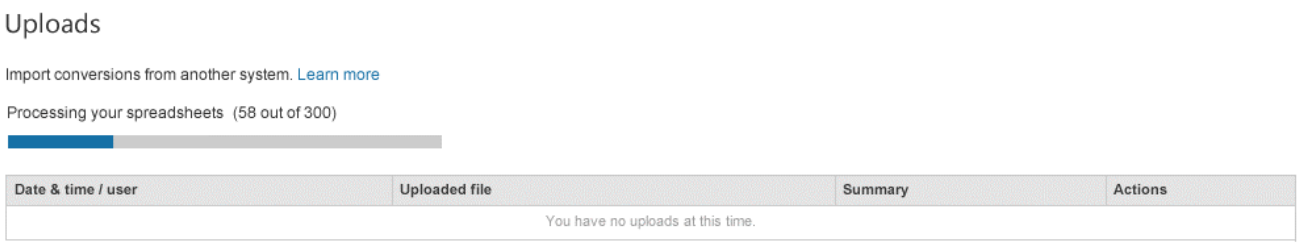
If TimeZone exists in both places, conversion time will be used.

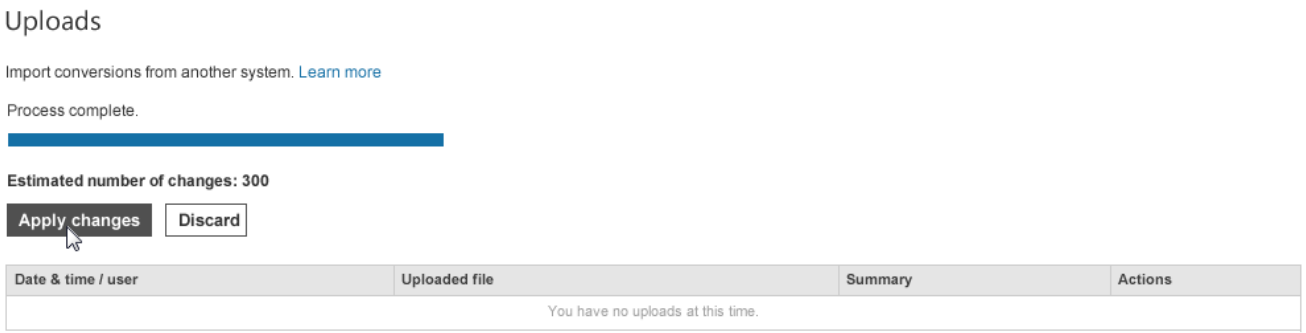
Only support conversions occurred within the past 90 days.

File limitations - Max 100K rows per upload and less than 200MB file size.

Review status and apply changes

Review the status of the upload and apply changes.

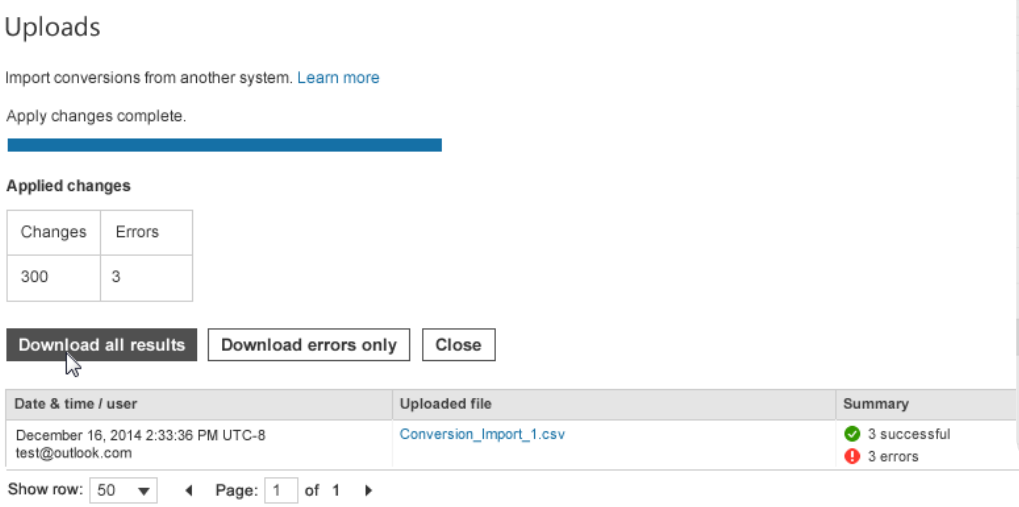


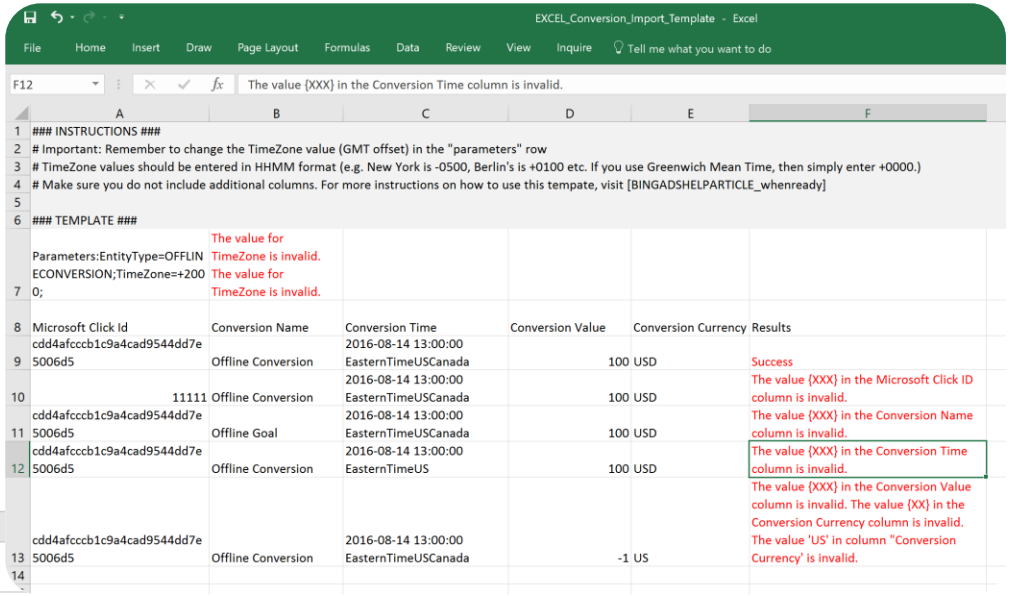


Resolve any upload errors

Review any import errors in Excel.

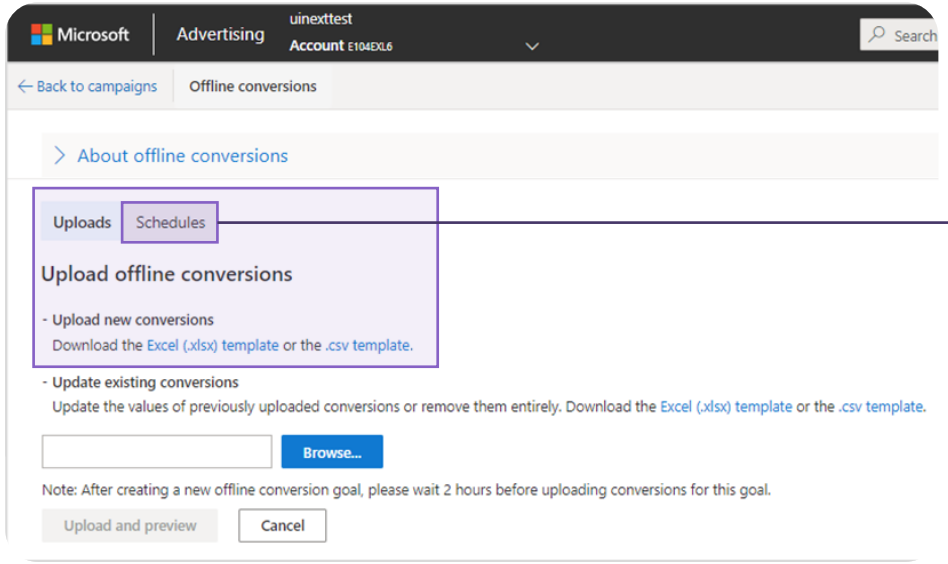
The download links will be available for 180 days after initial upload.

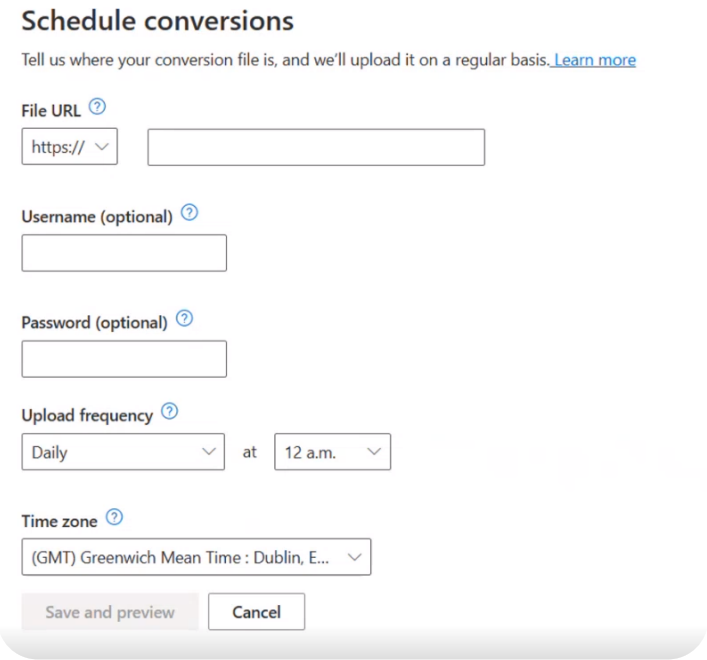




Update and delete offline conversions

Download the Excel and CSV templates for updating and deleting offline conversions, then schedule the upload at a frequency.





You can also delete or edit the value of an already recorded conversion with the **Restate** or **Retract** feature.

Enhanced conversions for **offline** conversions

For offline conversions, you can upload or import conversion data into Microsoft using first-party customer data from your website lead forms. If the data that's uploaded via offline conversions isn't hashed, we'll detect that it has not been hashed and send an error.

HOW IT WORKS

01

User clicks on your ad and arrives on your site.

02

User browses your site and reads about your product/service.

03

User fills in a form on your site and becomes a lead. Your website sends Microsoft hashed lead information (e.g. email) that you specify.

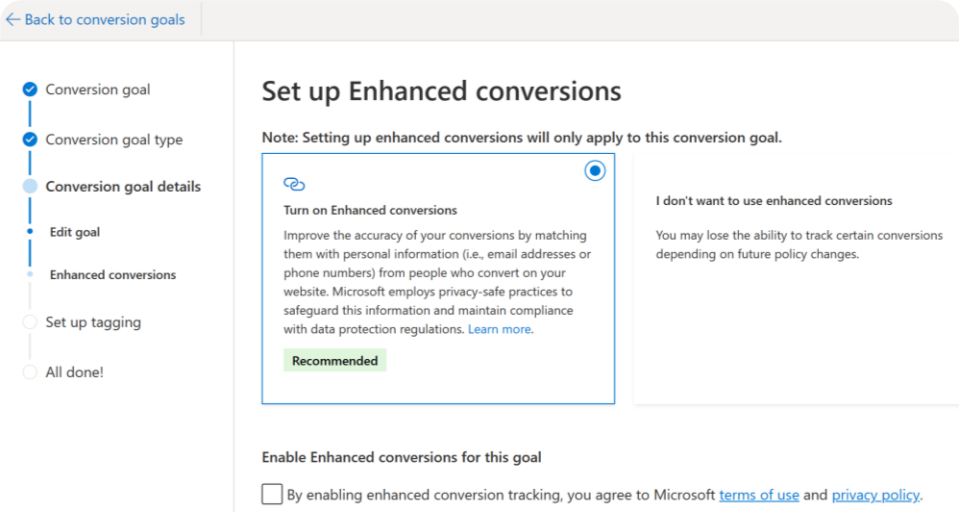
04

When a lead converts, you upload the hashed lead information. Microsoft matches the hashed information back to the ad that drove the lead.

Setting up an **offline** enhanced conversion goal

You can either create a new enhanced conversion goal or update an existing conversion goal to be enhanced.

1. Create a conversion goal. Tools -> Conversion goals -> + Create
2. Select 'Offline' as the kind of conversions you'd like to track.
3. Select the goal category and goal type according to your preferences.
4. Set your goal settings according to your preferences .
5. Select 'Turn on enhanced conversions' and select the associated privacy checkbox, select 'Next' and you've completed creating the conversion goal.
6. To upload the offline conversions, download the import template from Tools -> Offline Conversions -> Uploads, and fill the data according to the instructions on the template.
   a) **Follow the required hashing rules for the email address/ phone number and add the hashed versions of the data into the last two columns of the template.** [Learn more.]
   b) Upload the filled file to the Uploads page to track conversions.



Offline Conversions via API instead of UI

- Support C#, Java, PHP and Python
- SDKs are available for all supported languages
- Require development effort from customer side

offline_conversion_bulk.py

```python
from auth_helper import *
from bulk_service_manager_helper import *
from output_helper import *


# You must provide credentials in auth_helper.py.

def main(authorization_data):
    try:

        upload_entities = []

        bulk_offline_conversion = BulkOfflineConversion()
        offline_conversion = set_elements_to_none(campaign_service.factory.create('OfflineConversion'))
        # If you do not specify an offline conversion currency code,
        # then the 'CurrencyCode' element of the goal's 'ConversionGoalRevenue' is used.
        offline_conversion.ConversionCurrencyCode = "USD"
        # The conversion name must match the 'Name' of the 'OfflineConversionGoal'.
        # If it does not match you won't observe any error, although the offline
        # conversion will not be counted.
        offline_conversion.ConversionName = "Offline Testing01"
        # The date and time must be in UTC, should align to the date and time of the
        # recorded click (MicrosoftClickId), and cannot be in the future.
        offline_conversion.ConversionTime = datetime.utcnow()
        # If you do not specify an offline conversion value,
        # then the 'Value' element of the goal's 'ConversionGoalRevenue' is used.
        offline_conversion.ConversionValue = 10
        offline_conversion.MicrosoftClickId = "MSClickID_Goes_Here"
        bulk_offline_conversion.offline_conversion = offline_conversion
```

Conversions API

Designed to collect server-to-server (s2s) conversions from various data sources, including web, app, offline conversions and in-store purchases.

Timeline: pilot to begin May 2025

Requires preapproval process

Automated bidding designed to meet your goals

Maintain Control

You set your budget, select the bid strategy, and set targets.

Flexible Offerings

Select different goals for different campaigns – whether you want to hit an impression share, cost per acquisition (CPA), return on ad spend (ROAS) target, or volume of clicks or conversions.

Real-Time and Data Driven

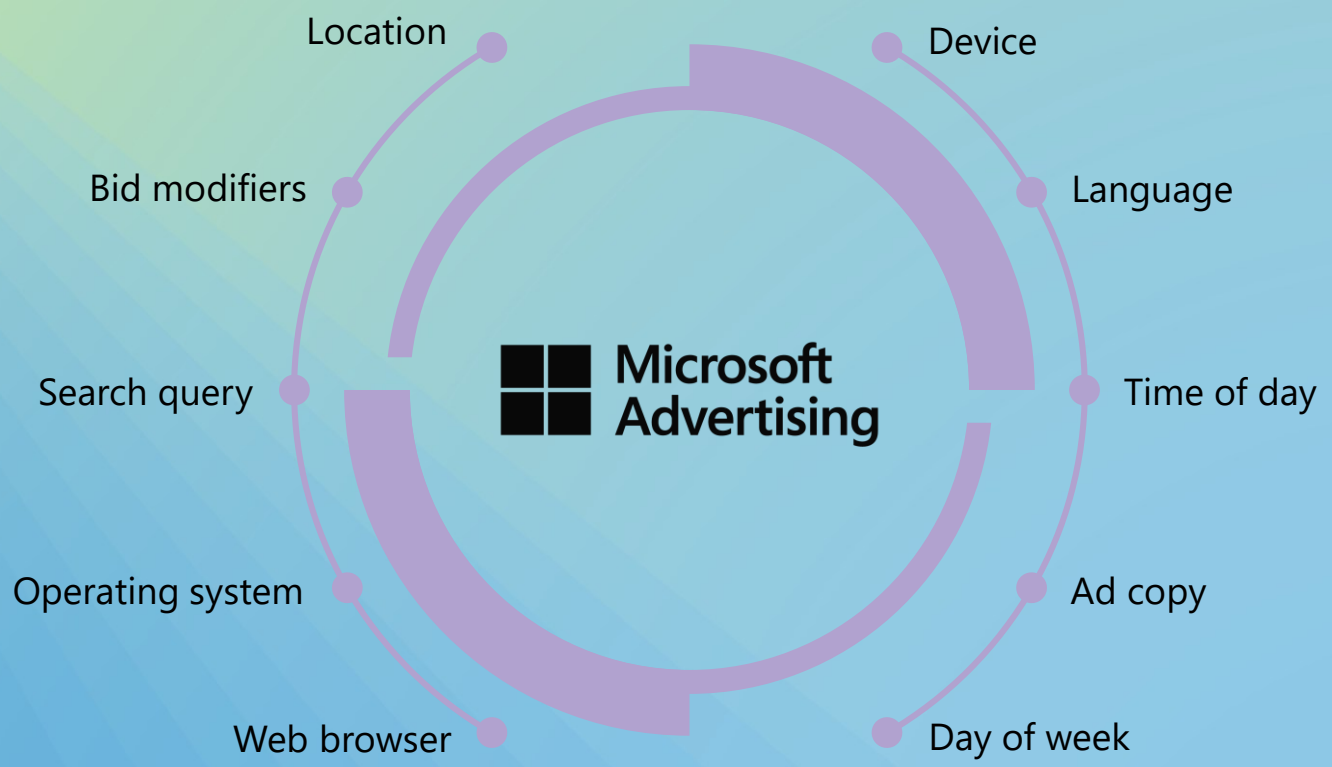
Advanced technologies, always improving.

Optimized to the user at the auction level.

Exclusively Focused on Your Success

All decisions and optimizations help you achieve your advertising goals and performance targets.

Key auction signals for automated bidding



*Universal Event Tracking (UET) conversion tracking data signals are also considered in Automated bidding optimizations, if available. If not available, auction-time signals depicted here are used to determine conversion likelihood.

Automated Bidding strategy choices

Enhance CPC (default)

Automatically increases or decreases your bid based on the predicted clicks and conversions

Maximize Clicks

Helps you get as many clicks as possible.

Target Impression Share

Control ad placement and impression share.

Target CPA

Helps you get as many conversions as possible for the given CPA target.

Target ROAS

Helps you gain as much conversion value/revenue as possible for given ROAS target.

Maximize Conversions

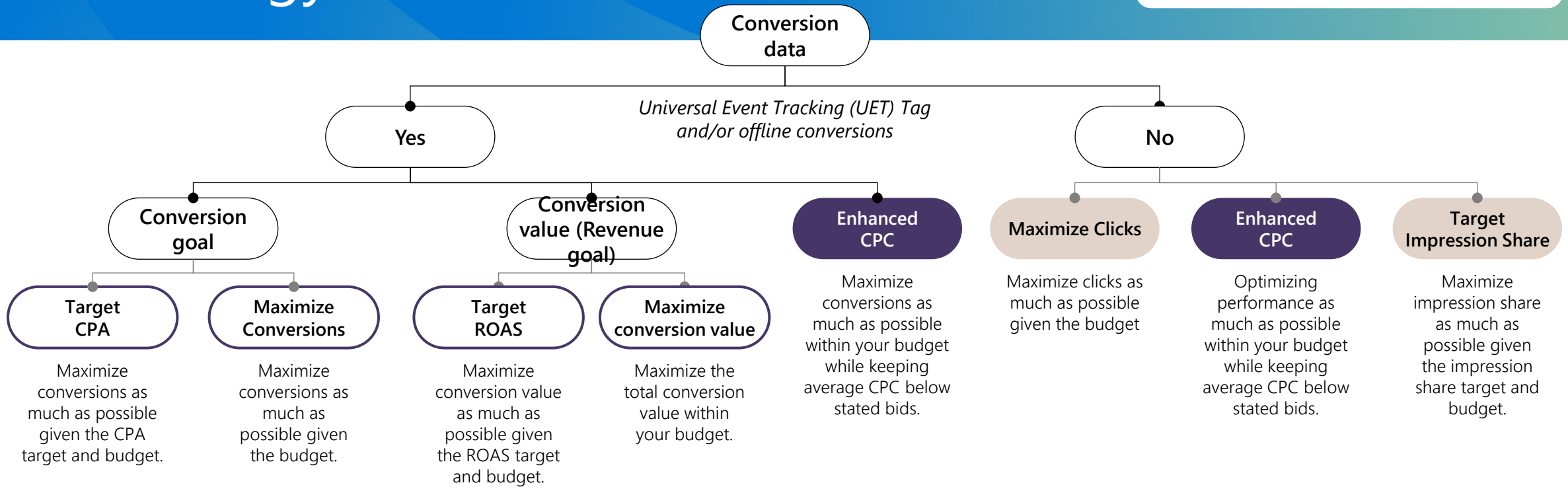
Helps you get as many conversions as possible.

Maximize Conversion Value

Maximize the total conversion value within your budget or ROAS target.

Selecting the optimal automated bid strategy

- Recommended if using manual, in-house/technology provider bidding
- Eligible with Portfolio Bid Strategies
- Eligible with Seasonality Adjustments



Note: for even greater control, you can use maximum cost per click (CPC) for Maximize conversions, Maximize clicks, Target CPA, or Target ROAS.

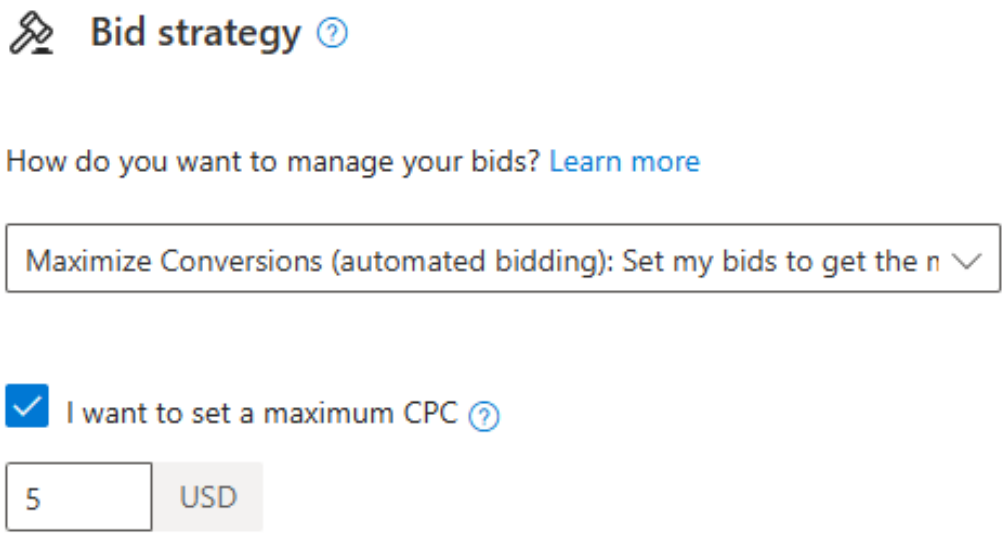
Bidding strategy compatibility details

Bidding type	Conversion tracking	Campaign compatibility	Compatible with third-party or in-house bidding	Markets*
Enhanced CPC (default for Search)	Recommended but not required	Search, shopping, audience	Yes, complements third-party /in-house bidding	Global
Maximize Clicks	Not required	Search, shopping	No, bids are exclusively managed by Microsoft Advertising	
Maximize Conversions	Required (UET and/or Offline)	Search, audience, PMax		
Maximize Conversion Value	Required (UET and/or Offline)	Search, shopping , PMax		
Target CPA	Required (UET and/or Offline)	Search, audience		
Target ROAS	Required along with the revenue parameter in UET or offline goals	Search, shopping		
Target Impression Share	Recommended but not required	Search		

Set a maximum CPC (cost per click)

To set a maximum CPC, your campaign must use one of the follow bid strategy types:
Maximize conversions, Maximize clicks, Target CPA, or Target ROAS. **If your campaign uses one of these bid strategies, follow these steps:**

1. From the navigation menu on the left, hover over **Campaigns** and select **Settings** > **Settings**.
2. In the table, select the name of the campaign you want to edit.
3. In your campaign settings, under **Bid strategy**, select the checkbox next to **I want to set a maximum CPC**.
4. Set the maximum CPC amount you want to apply.
5. Select **Save**.



Duration of learning period and elements contributing to the learning process

The learning period is applicable only to new campaigns or bid strategies (initial 1–2 weeks). After this phase, incremental optimization such as adjustments to bids, targets, or budgets won't initiate a new learning period although ongoing optimization will continue. The degree of learning is influenced by factors like change magnitude, conversion numbers, and any conversion delays, potentially leading to a brief adjustment period.

Scenario	Learning period	Incremental optimization
A new campaign/ portfolio has been newly created **or** a campaign/ portfolio has been moved to a new bid strategy.	Initial learning period is 1–2 weeks, however higher conversions can contribute to a shorter learning period and lower conversion contribute to longer learning period. Our platform usually needs 1–2 weeks to optimize for your campaign. Avoid changing budgets or conversion goals during this period, as this may cause the learning period to prolong. We recommend *not* evaluating the bid strategy's performance based on these 2 weeks.	Not applicable
A campaign/ portfolio has added/removed a main conversion goal.	Not applicable	Incremental optimization is 2 weeks + conversion delay, however higher conversions can contribute to a shorter learning period and lower conversion contribute to longer learning period. Let your campaign run for 2–4 weeks and then start evaluating the bid strategy's performance. Keep conversion delay in mind while evaluating performance and refer to our best practices.

Note: Changes are not recommended during the initial learning period after starting a new campaign or bid strategy.

Things to know

01

Any conversion goal-related change, such as changing the goal definition, creating a new goal, or making a goal main/non-main, can be considered a tangible change that can impact auto bidding optimization.

02

If you don't or can't upload offline conversions daily, we recommend not using Target CPA. For best results, upload offline conversions within two days of the conversion.

03

Conversion delay is the number of days between a click and a conversion. As this can vary for each click, we loosely define it as the number of days it takes for 90% of the conversions to materialize.

04

As auto bidding involves machine learning models, all suggestions shared are general guidance and not hard rules unless specified otherwise. There are always likely to be some exceptions based on specific nuanced scenarios.

05

To optimize well, a portfolio needs at least 30 conversions in the last 30 days. This total can come from one or multiple campaigns within the portfolio.

Performance Max

Microsoft Advertising

Performance Max: one campaign bringing together the best of Microsoft's automation to find you more conversions

You architect the strategy with goals, assets, and signals. Our AI dynamically creates and optimizes ads across all Microsoft Advertising surfaces to maximize performance.

Performance Max

Maximize your results, as you define it, with one AI-powered campaign across all Microsoft inventory

Drive more results

Drive net-new conversions and capture more high-ROI conversion opportunities and get clear insights into what's driving performance.

Optimize with Microsoft AI

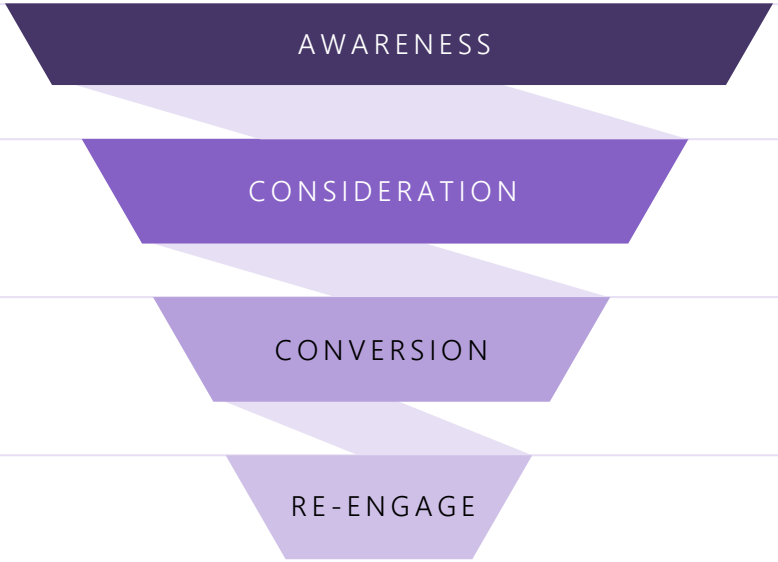
You architect the strategy to effectively reach your highest-performing audiences, and Microsoft's AI-powered multi-format, cross-channel optimization does the rest to maximize your ROI

Scale with a unified campaign

Tap into inventory and opportunities often missed with siloed campaign setups, and reach high-value audiences across Microsoft properties, including Copilot.

How to reach your goals throughout the funnel

Performance Max complements and **augments** your existing Microsoft Advertising strategy across the funnel



PERFORMANCE MAX

Drive more conversions across multiple formats and channels to hit your marketing goals, powered by the best of Microsoft AI and automation.

AUDIENCE CAMPAIGNS

Drive engagement with your ideal audience based on rich intent signals.

Complementary to Performance Max

SEARCH CAMPAIGNS

Drive consideration, conversion and re-engagement with keyword-based campaigns.

Complementary to Performance Max

SHOPPING CAMPAIGNS

Drive consideration, conversion and re-engagement for your products.

Complementary to Performance Max (prioritization removed May 2025)

AUTOMATION ⟷ CUSTOMIZATION

Performance Max delivers *the best of Microsoft AI and automation* to drive results based on your marketing goals

Audience, search, and shopping campaigns can help you drive more volume with a more *customized strategy*

Performance Max – Unique features at Microsoft

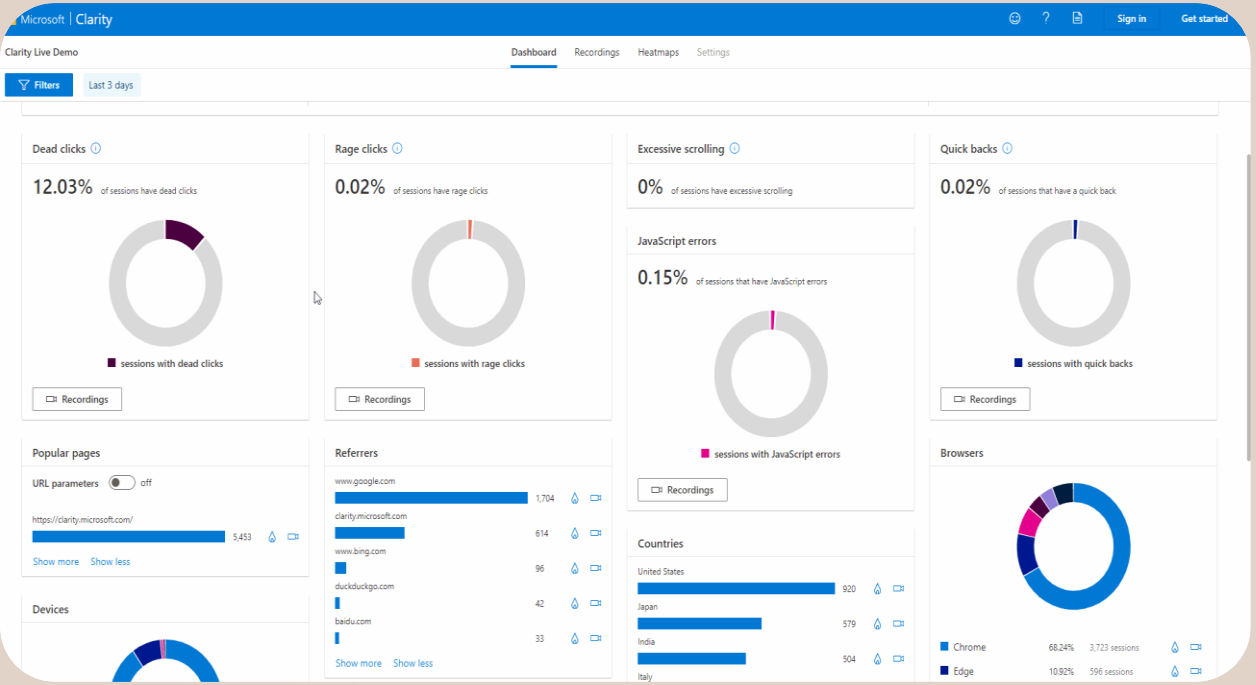
- Does not require a Video asset
- A focus on high intent ads like Search
- Layer LinkedIn targeting as signal
- Multimedia Ads
- Can serve ads in Copilot
- Often more efficient than Performance Max on Google

UET tag is the basis of Automation: Key steps for success

1. Universal Event Tracking: 1 tag to rule them all! Implement it on every page directly or through Tag managers

2. Update your UET tag with **Consent Mode** and all recommended parameters, i.e. page type and product ID for Dynamic Remarketing, dynamic revenue or custom events, etc. Create conversions goals

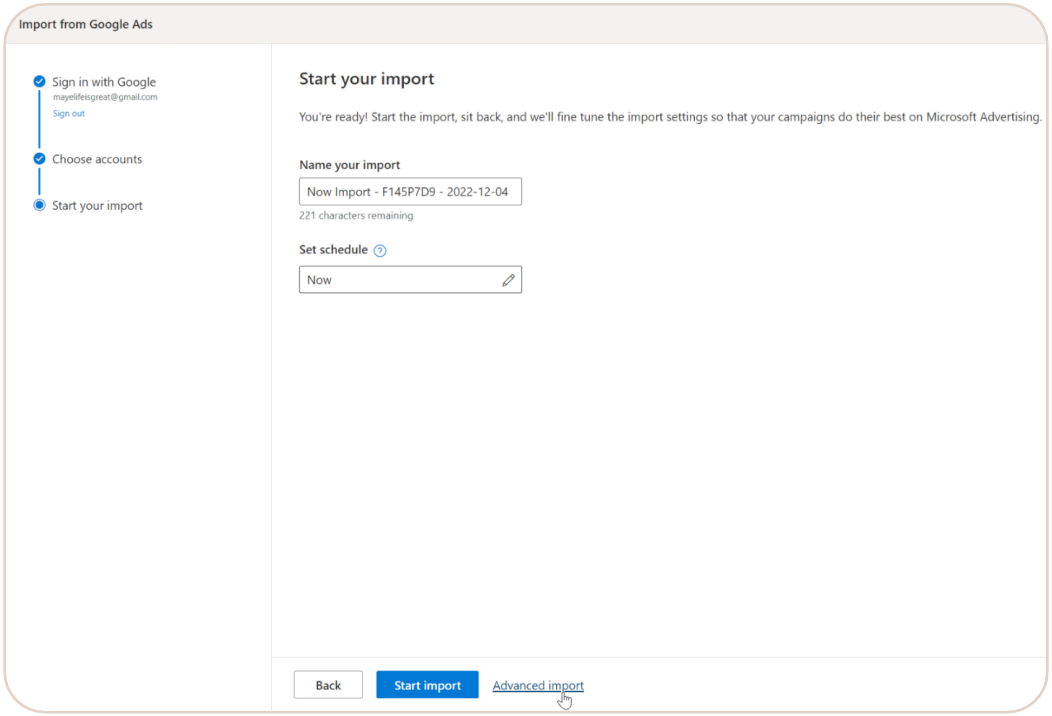
3. Leverage troubleshooting tools (UET Dashboard, Insights, UET Tag Helper), and Clarity to ensure everything works as it should.

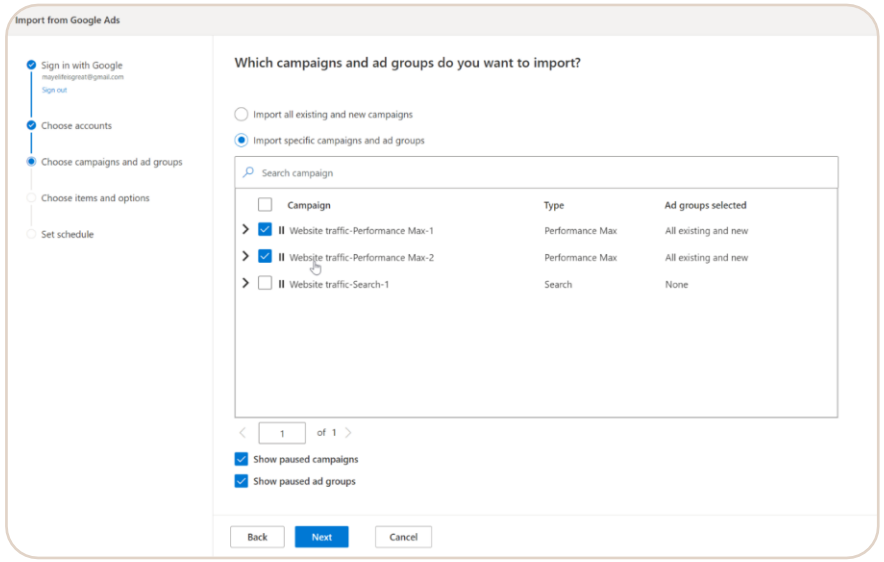


Get started quickly by importing from Google

After ensuring you have the Universal Event Tracking (UET) tag in place with conversion tracking, import your Google Performance Max campaigns in just a few clicks

See more information in the Google Import PMax guide!





Q&A

Thank you

Microsoft Advertising