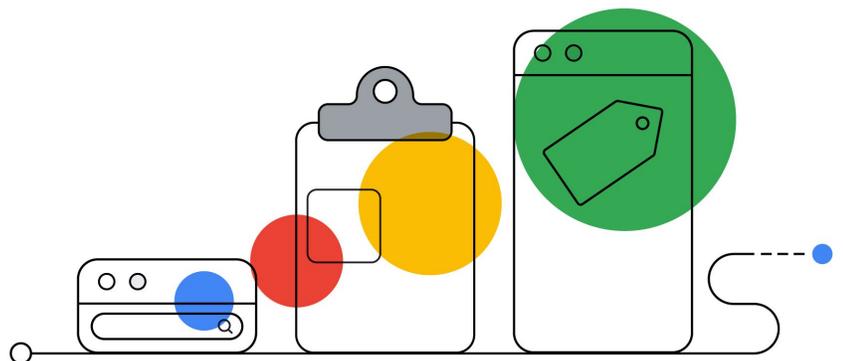
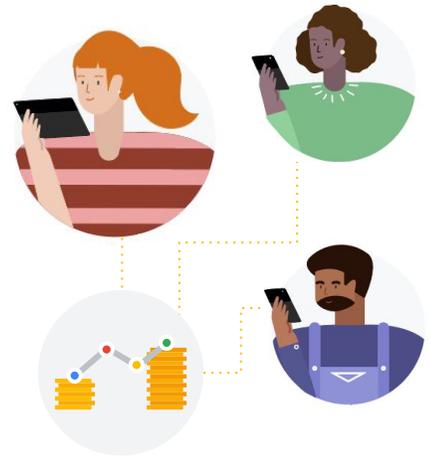


# OCI helper: Practitioner Guide

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# 1 The OCI helper: Platform overview

**The OCI helper:** This self-service implementation platform will guide and assist your team in **offline conversion import (OCI/OCT)** and **conversion value** implementation.

## Why use the OCI helper?

### Helps address the lead quality challenge

[70% of lead generation advertisers claim that lead quality is their biggest challenge.](#) Offline data allows advertisers to measure the quality of their leads better.

### Customer and agency self sign-up

Your business can sign-up directly to implement OCI/OCT without any additional support needed, allowing your team to implement OCI/OCT at your own pace.

### Synergy with all advertising strategies

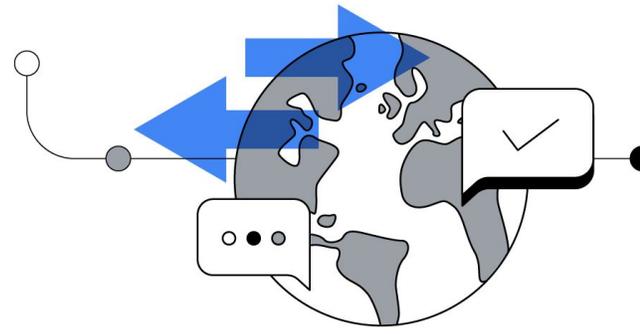
Businesses achieve a [20% increase in revenue and 30% cost efficiencies](#) when integrating strategies with customer data across the whole lead-to-sale journey.

### Customized implementation plan

Customized implementation steps based on your company resources (e.g., CRM usage, sales cycles), ensuring that the implementation approach fits your needs.

## How does the OCI helper work?





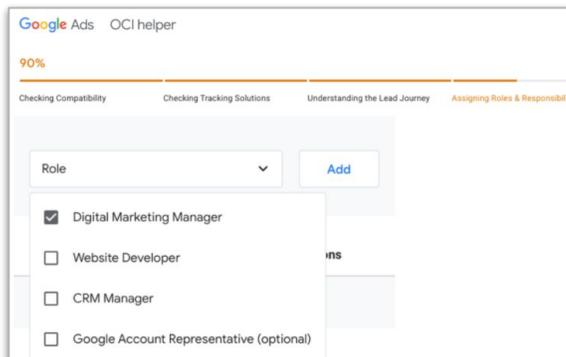
## 2 Sign in to the OCI helper

### How do I sign in?

Use your Google Account to use the platform

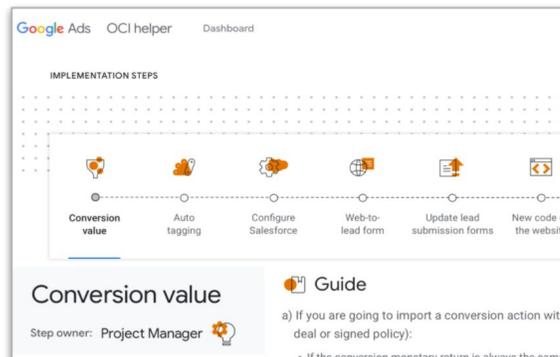
Google accounts are free, create one [here](#).

### Why do I need to be signed in?



#### Stakeholders Collaboration:

Multiple users can log in on the same implementation project to collaborate as your team works to import offline conversions.



#### Customized implementation plan:

The OCI helper creates a fully customized implementation plan for your business based on the saved project information.

### How is my data being used?

None of the information collected by the OCI helper will be shared with any third parties. Data will be used exclusively by the platform's backend to:

- Create a customized implementation plan for your business.
- Track your progress within the platform.
- Allow your team to work in the same project management environment.



# 3 The questionnaire

## What is the questionnaire?

The OCI helper will ask a series of customization questions whenever you start a new project. The platform will use your answers as the base for the implementation process.

## Who in my company is best fitted to answer these questions?

Ideally, a person within the organization that has a good understanding of the following topics:

- Your customer’s lead-to-sale journey (the list of events that gradually process and qualify inbound leads into a paying customer).
- Your company’s marketing objectives and targets.
- A high-level view of the tools and systems your company uses to process leads (e.g., CRM, web databases, spreadsheets).



Before we get started, let's make sure offline conversion import is the right solution for your business. We'll ask a few quick questions to understand the approach that best fits your needs.

INITIAL SET UP PROGRESS: 0%

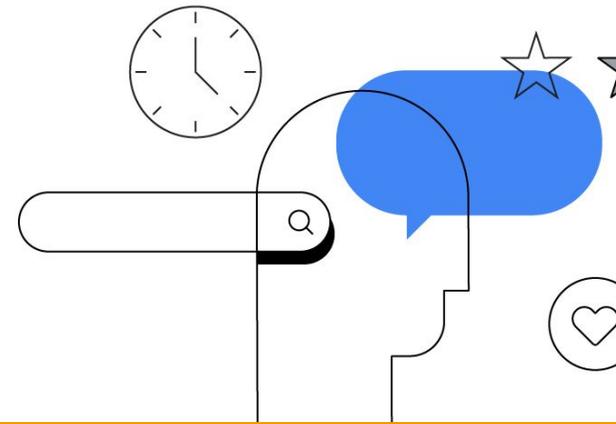


### UNDERSTANDING YOUR BUSINESS

Do you already know which action you will import as the offline conversion?

Examples [here](#).

Yes	No Not sure which actions you can import? Learn more <a href="#">here</a>
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## 4 Stakeholder assignment

Teamwork makes OCI implementation very simple! There are four roles to be filled by members of your company to implement offline conversion imports successfully.

### What are the roles?



#### Project Manager

Responsible for assigning the other roles and communicating among stakeholders



#### Digital Marketing Manager

Access to the Google Ads interface (Standard Access Level)



#### Website Developer

Administrative access to the source code of your website (FTP/Admin panel access)



#### CRM Manager

Admin access to the tool you are using to track lead progress (e.g. CRM / Spreadsheet / Web Database)

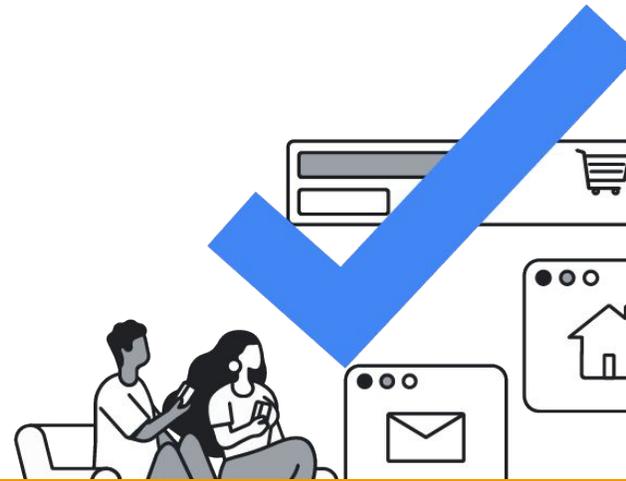
### Can I assign the same person to multiple roles?

Yes! You can also assign multiple people to a single role. You can assign up to four people to each role. You cannot start the implementation process without all roles assigned.

### How do I assign roles?

Once you answer the questionnaire, the OCI helper will prompt you to the stakeholder assignment page to add, edit and delete stakeholders to implementation roles. Whenever you assign a person from your team, they will receive a invitation email to join your project on OCI helper.

# 5 Implementation page



Once you have answered the questionnaire and assigned stakeholders to the implementation team, your team will be prompted to the customized implementation process. Every implementation page has the following information:

## Progress bar



The progress bar shows how advanced your team is regarding the implementation process (you can click on any of the implementation steps to navigate directly to that page).

## Step owner

### Conversion value

Step owner: Project Manager

Each step has a *step owner*. The person (or people) highlighted as *step owner* is in charge of executing that specific implementation step. Whenever your implementation advances steps, all new *step owners* will receive an email letting them know that action is required.

# 5 Implementation page



## Goals

### Goals

1. If the values are not currently tracked internally or are always the same - calculate the conversion value (either monetary or expected) and communicate this value to your Google Ads Manager (to be set on step 3).

Each step of the implementation process has one or more goals to be accomplished by the *step owner* to advance to the next step.

## Overview

### Overview

Not all conversions are equal – some are worth more to your business than others. It's much harder to grasp how 100 conversions impact your business without a value. If you assign values to your conversions, you'll be able to see the total value driven by your advertising across different conversions, rather than simply the number of conversions that have happened and you'll be able to identify and focus on high-value conversions.

You can find a quick overview of what is required at the current implementation step right below the goal.

## Guide

### Guide

- a) If you are going to import a conversion action with direct monetary return (such as a final sale, closed deal or signed policy):
  - If the conversion monetary return is always the same, this value should be set on [step 3](#) of the implementation process by the Google Ads Manager.

Follow the detailed step-by-step guide on each page to drive OCI implementation!

# 5 Implementation page



## Common pitfalls to avoid

### ! Common pitfalls to avoid

**Missing pages:** In order to avoid missing some conversions, it's strongly recommended that you add this script to every web page on your site (not just your landing pages). For example, add this script to your webpage template, so that all your new pages will automatically include it. Or you can add this script in a global element like the page footer.

We've listed the most common implementation issues found on each implementation step. Make sure to read these pro-tips before following the guide.

## Advancing to the next step

Completed this step? A confirmation email that you can modify will be available after clicking the "View email and send" button below.

View email and send

Once you're all set with the current step, click on View email and send, this will allow you to customize the message the OCI helper sends to the step owners responsible for the next implementation step.

## Support options



Click [here](#) to reach out to support. [More about setting conversion value](#)

At the bottom of each implementation step page, we have listed all available support options.