

— B2B INBOUND SERIES · 2025

Offline Conversions

eBook

A conversion that filters for quality, comes with large quantities and occurs close to real-time.

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Why Offline Conversions need to be part of any B2B 2025 inbound strategy

Any B2B business working on a long-term inbound strategy would know that attribution is key to success. Lead and pipeline attribution would define how next period's budgets would be distributed across channels, assets and personas.

Attribution was challenging even before user privacy came into play. Today more than ever marketers need visibility between budget invested and inbound success. And this is not simply so that marketing teams can have eyes on the budget, but more importantly because we need to help the advertising algorithms be better at identifying conversion success.

One of the indirect effects of the privacy regulations and the deprecation of 3rd party cookies is that advertising targeting becomes less effective.

As a result we monitor deteriorating quality of inbound traffic and leads across all inbound channels (Google Ads, Microsoft Ads, LinkedIn Ads, Facebook Ads etc.) The reason for this is that Google and the other ad platforms have a harder time connecting unconsented user behavior with their user graph. The result of this is an increase in low quality traffic and leads from our inbound channels.

To help navigate the ever increasing pool of impressions in an environment of imprecise targeting instruments, we need another way to navigate the ad algorithms.

Smart bidding has been the answer historically, but it is only as good as the conversions we feed the model with.

THE BOTTOM LINE

To bring back some precision we need to find a way to define a conversion that filters for quality, comes with large quantities and occurs close to real-time.

01

Quality

Filters for quality

02

Quantity

Comes with large quantities

03

Timeliness

Occurs close to real-time

How to define your Offline Conversions

Using lifecycle stages

The Offline Conversion strategy should be dictated by the parameters of each API and the smart bidding strategies. For example, one such restriction is that Google does not allow imports for clickIDs that are older than 90 days.

Based on these parameters we would define a list of offline conversions that would be used to optimize the inbound funnel.

A good place to start is the lifecycle stages. However, 8 out of 10 of the MOps lifecycle journeys we come across do not have lifecycle stages that are suitable for offline conversion tracking.

8/10

MOps lifecycle journeys we come across do not have lifecycle stages that are suitable for offline conversion tracking.

Normally, the MQL would be the primary candidate for Offline Conversion optimization, however, when evaluating its use we need to consider that it is usually based on lead scoring criteria which include behavior scores. This introduces a delay in the MQL signal reporting. If a campaign acquires a lead which is the perfect fit in terms of professional or company attributes, our job is to make sure the campaign reports success, even if that particular lead does not have the behavior score to reach the MQL stage. **Latency is one of the problems with using the MQL as an offline conversion.**

The second problem is volume. This is primarily because the MQL criteria is often too loose (e.g. some leads auto-MQL) or overly strict which would limit the conversion volume.

On a few occasions, when the MQL score is based on attributes instead of behavior actions, it serves as the perfect offline conversion. It guarantees a good filter for quality, but it preserves the timely reporting and the volumes needed for this conversion to be utilized in a smart bid strategy.

PROBLEM 01

Latency

Behavior scores introduce a delay in the MQL signal reporting.

PROBLEM 02

Volume

MQL criteria is often too loose (auto-MQL) or overly strict, limiting conversion volume.

Criteria that make lifecycle stages a good fit for Offline Conversion Tracking:

- ✓ Days between click and conversion < 15
- ✓ Monthly volume of campaign attributed conversions > 50
- ✓ Lead scoring takes into account the Ideal Customer Profile attributes and does not let 'unqualified' leads into the cycle

Using custom criteria

In the cases when the lifecycle stages result in too delayed and the volume of conversions is low, we can leverage custom offline conversion triggers.

So far we have established that a good offline conversion comes in high volumes, does not compromise on quality and occurs close to the click.

When such a lifecycle stage is missing, we can create our own metric.

One of the best offline conversions to have is **'ICP Lead'**, which evaluates incoming leads against a set of Ideal Customer Profile (ICP) attributes.

Unlike the MQL, the ICP metric does not consider behavioral scores, making it ideal for net new lead acquisition. By using the ICP Lead conversion, we can assess the fit of a person close to real-time as they enter the CRM.

Example ICP Lead criteria:

COMPANY SIZE

>500 employees OR >\$40M in VC Funding OR >\$50M in ARR

AND

JOB TITLE CONTAINS ANY OF
1 and 2 · or · 3 and 4 · or · 5

1 + 2

data mining data system

ELT integration

application bi enterprise

cloud data warehouse

AND

specialist architect

consultant developer

lead integrator

integration analyst

engineer

3 + 4

information technology

security data innovation

digital bi product it

strategy

AND

chief vp vice president

president head director

5

CDO SVP

AVP CIO

CEO CTO

Marketing's number one job in 2025 is to feed their inbound campaigns with timely and high-quality signals. The **'ICP Lead'** is both timely as it occurs on the same day and ensures a lead quality filter.

Define Offline Conversion Tracking

Offline Conversion Tracking means tracking conversion actions that happen in an offline (off-website) environment. An example offline source in B2B would be the CRM or the MOps platform.

The method for collecting these conversions is different from the online conversions. While online conversions can be collected using javascript which loads on the web property, offline conversions make server-side calls based on the Conversion APIs (CAPIs) of each ad platform.

What is ClickId (gclid, fbclid, msclkid, lin_fat_id)

The most important aspect of offline conversions is the unique click identifier that allows the advertising platform to associate the conversion with the click. Once associated with a click, the conversion can be reported across all available dimensions (campaign, ad group, ad, keyword, audience etc.) and can be attributed between campaigns for multi-touch attribution. In other words, it behaves as a regular Javascript based conversion action.

In the center of the offline conversion matching lies the unique click identifier which is created with each ad click. The clickID is a querystring parameter added to the ad URL dynamically when someone clicks on an ad. The unique value holds information about the campaign, targeting, ad type and various other dimensions on the ad side.

Here is a mapping of all clickIDs and available parameters needed to match an offline conversion for the top 4 ad channels in B2B which support offline conversion imports:

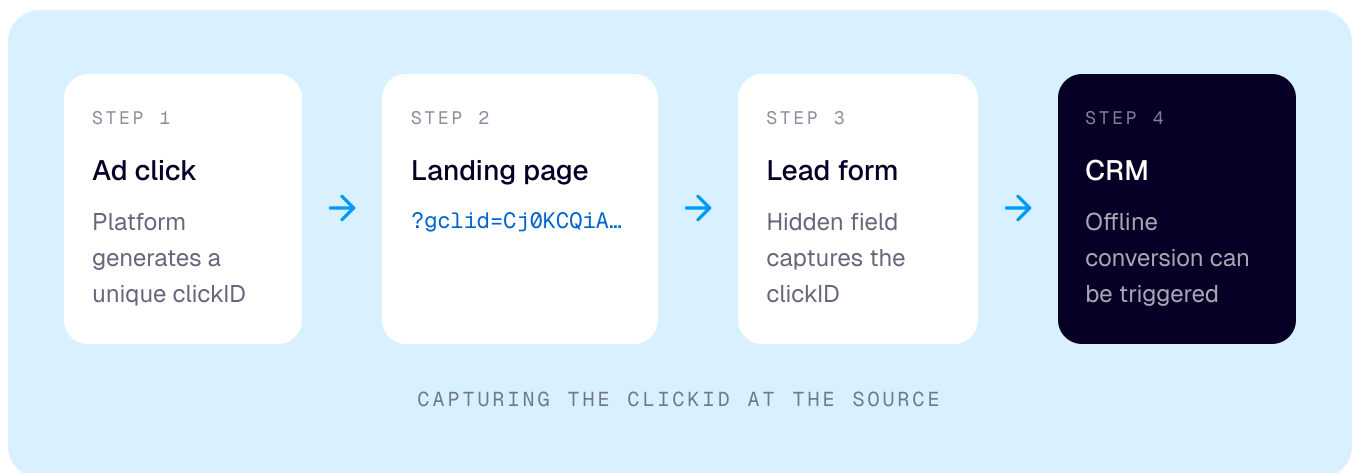
PLATFORM	CLICK IDENTIFIER	MATCHING CRITERIA (REQUIRED)	OTHER PARAMETERS (OPTIONAL)
Google Ads	gclid	clickid, conversion name, timestamp	conversion value
LinkedIn Ads	lin_fat_id	conversion name	first name, last name, company name, email, phone number, job title, timestamp
Bing Ads	msclkid	clickid, conversion name, timestamp	conversion value
Facebook Ads	fbclid	clickid, conversion name, conversion value, timestamp	first name, last name, email, phone number

How to collect the Offline Conversions

First step: Collect ClickIDs

Capture the ClickID

Playing a central role in the conversion attribution, the offline conversion strategy starts with capturing the clickIDs at the source. This can be done using hidden fields, similar to how lead forms capture `utm_` tracking parameters. Once the clickIDs are in the CRM, an offline conversion can be triggered.



(Pro Tip) Persist the ClickID

Capturing the clickIDs with the form fill as hidden fields is relatively simple, but making sure the clickIDs get to the form page is a bit more complicated.

All clickIDs are querystring parameters, which means they are populated as parameters of the landing page url. However, when a user navigates to a different page on the website the clickIDs get lost and the hidden fields cannot be populated.

32%

of the conversions are at risk of not being attributed due to missing clickIDs (based on a pool of 3 B2B accounts. Period 2023–2024).

To solve this we need to make sure we store the clickIDs across the length of the entire session to make sure they are made available to the form page when the form fill happens.



Second Step: Choose Stack

After we make sure we have the clickIDs we need to select the best way to move this data from the CRM to the ad platforms.

HubSpot, Marketo, Pardot/SFDC all have some sort of a native capability to send offline conversions. Below we'll examine the two options to send offline conversions from your MOps platform/CRM: Native connectors vs. 3rd Party connectors.

Native Connectors

All native connectors step on the available CAPI endpoints. They allow us to create a trigger inside of the MOps Platform/CRM and allow an automated flow of conversions.

Note, when using the native connectors with HubSpot and Marketo there is no need to create custom clickID attributes and populate hidden fields. The platforms take care of that.

The Native Connectors make it simple and fast to integrate your CRM/MOps platform with the ad platforms using a simple OAuth 2.0 login. Then you are left with following an easy interface flow to create an offline conversion pipeline and let this data flow towards the ad platforms.

The idea behind the Native Integration is quite appealing as the link requires a few minutes with the right level of access.

However, due to multiple API restrictions centering around the timestamp of the conversions, **the successful conversion match to the clickID falls short.**

Here is a detailed measurement of the reduced match rates for offline conversions using Native SFDC, HubSpot or Marketo connectors. (Data for Aug–Sep 2024.)

COMPANY 1 · MATCHED IN GOOGLE ADS

	26	7	22	26
SAL	Count in CRM	SFDC Native Connector	MOps Native Connector	3rd Party Connector

3rd Party connectors ensure up to **73% more SAL conversions** compared to SFDC and **15% more conversions** compared to native Hubspot data flows.

COMPANY 2 · MATCHED IN GOOGLE ADS

MQL	10	9	10
	Count in CRM	HubSpot	3rd party (Zapier)
OPPs	8	5	8
	Count in CRM	HubSpot	3rd party (Zapier)

Up to **10% more MQLs** and **37% more Opps** using a custom OCT implementation compared to native HubSpot data flows.

COMPANY 3 · MATCHED IN GOOGLE ADS

	96	66	96
MQL	Count in CRM	Marketo	3rd party (Zapier)

Up to **31% more MQLs** reported using a custom implementation compared to native Marketo data flow.

COMPANY 4 · MATCHED IN GOOGLE ADS

	959	723	959
MQL	Count in CRM	Marketo	3rd party (Zapier)

Up to **25% more MQLs** reported using a custom implementation compared to native Marketo data flow.

Due to multiple API restrictions centering around the timestamp of the conversions, the successful conversion match to the clickID falls short.

Custom (3rd party) Connectors

These types of Offline Conversion connectors rely on direct API server-side calls or 3rd party integrators like Zapier, HighTouch or Segment. Whatever the method is, what is different about these types of integrations is that we can modify the trigger, the attributes and the delay between the CRM action and the actual offline conversion event.

We need to modify all of these components to ensure we match all eligible conversions. Eligibility is dictated by the data matching restrictions imposed by each vendor.

Here is an example from Google Ads:

IDENTIFIER TOO OLD

We only keep the GCLID for 90 days. We recommend you upload more frequently, or if your conversion happens after 90 days, upload a different offline conversion event that happens within 90 days. You may also receive this error if the conversion is older than your specified conversion window.

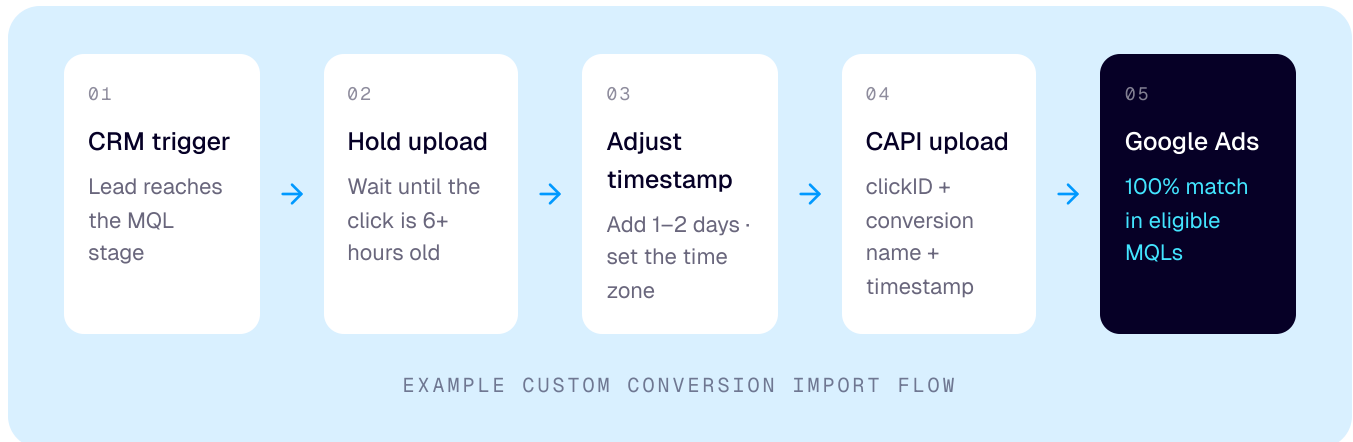
CLICK TOO RECENT

The click associated with the given identifier or iOS URL parameter occurred less than 6 hours ago, retry after 6 hours have passed.

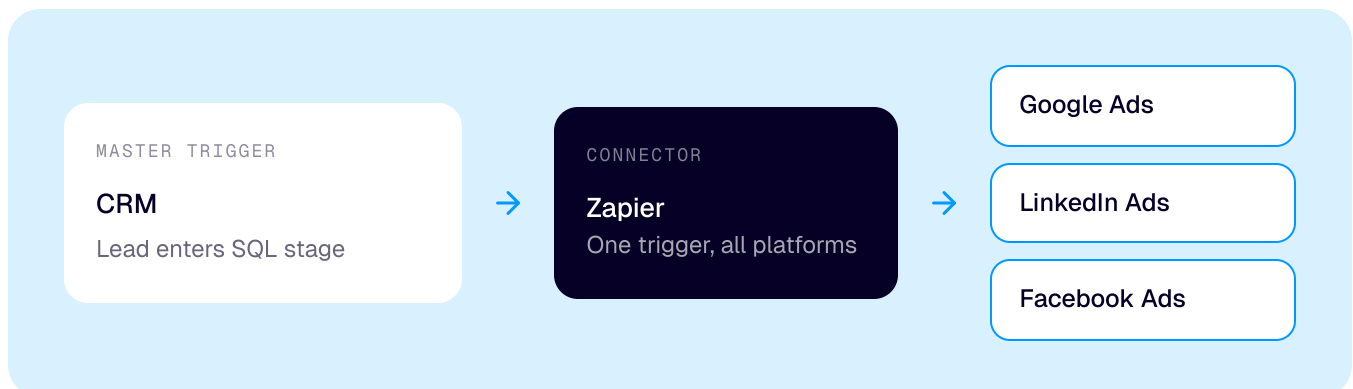
INVALID CONVERSION TIME

The offline conversion can't happen before the ad click. Add 1-2 days to your conversion time in your upload, or check that the time zone is properly set.

With platforms like Zapier, HighTouch or Segment we can build a conversion import flow that addresses all timestamp based API errors. Here is an example of one such custom flow that ensured **100% match in eligible MQLs** in Google Ads.



Platforms like Zapier also allow us to create one master trigger (e.g. Lead enters SQL stage) to trigger an offline conversion across all relevant ad platforms. Here is an example for Google, LinkedIn and Facebook.



Summary

Offline Conversion Tracking connects what happens in your CRM back to the ad click — giving smart bidding the timely, high-quality signals it needs in a privacy-first world.

01 Why it matters

Privacy regulations and cookie deprecation degrade ad targeting and inbound lead quality. A good offline conversion filters for quality, comes in large quantities and occurs close to real-time.

02 Define the conversion

Lifecycle stages work only when they are timely and high-volume — the MQL often is not. When it falls short, use custom criteria like the 'ICP Lead', which scores attributes instead of behavior, on the same day.

03 Capture & persist ClickIDs

Capture gclid, fbclid, msclkid and lin_fat_id in hidden form fields — and persist them across the session, or up to 32% of conversions risk going unattributed.

04 Choose the right stack

Native connectors are fast to set up but lose matches to timestamp restrictions. Custom (3rd party) connectors like Zapier let you adjust triggers, delays and timestamps — up to 100% match in eligible conversions.



Outsmart, don't outspend.