GUIDE · SETUP CHECKLIST · NIMBUS MEDIA

Where your leads actually come from.

You are measuring traffic. The only number that matters is booked revenue. Closing that gap takes one properly defined event and one tracked phone number, not a new platform.

WHAT IS INSIDE

EDITION

Nimbus Media
September 2026

FORMAT

12 pages
20 live checkboxes

TIME NEEDED

One afternoon
Ten minutes a week after

How to use this.

Twenty boxes across three pages, and they are live. Tick them in any PDF reader, save the file, and your progress stays put. The order below is the order that works.

Read pages 4 and 5 first, even if you skip everything else

They are the two pages that explain why your reports and your bank statement disagree. Everything after them is repair work. If you only have ten minutes today, spend it there and come back.

Do the two checklists in one sitting

Pages 7 and 8 are the whole setup. Fourteen boxes. One is an event definition, the other is a phone number. Neither needs a developer and neither needs a new subscription. Finish both, because a form-only setup tells you less than no setup at all: it is confidently wrong about the half of your leads that arrive by phone.

Start the ledger on page 10 in the same week

Six columns in a spreadsheet, about ten minutes a week. It is the only record you will own that contains both where somebody came from and whether they paid you, which is why it beats every dashboard.

Keep page 11 beside you when the next report arrives

Six boxes to run over whatever lands in your inbox. If a report cannot tick them, you now know exactly what to ask for and what the honest answer sounds like.

WHAT YOU NEED BEFORE YOU START

- Admin access to your own GA4 property, not your agency's login.
- The ability to edit your website, or somebody who can within a day.
- A spreadsheet. Any spreadsheet.

WHAT THIS DOES NOT ASK YOU TO BUY

- No analytics platform, no CDP, no data warehouse.
- No CRM, though the ledger becomes one if you let it.
- One optional paid tool, named on page 8, and only if the phone matters more than the form.

BEFORE YOU START

Where this guide names a threshold, a limit or a setting, it came from Google's own documentation, checked in September 2026.

This area has changed repeatedly and it will change again. Anything carrying a date is a rule that moved recently, and the date is there so you can tell how stale this page has become.

Nothing here is a trick, a growth hack or a workaround. It is the plain version of what a competent agency does in week one, written down so you can check whether yours did.

The number you cannot answer.

Ask an owner how the website is doing and you get sessions, impressions and a rankings chart. Ask where the last ten customers came from and the room goes quiet. Those are not the same question and only one of them pays for anything.

1,000
EVENTS A DAY

7 of 28
DAYS REQUIRED

30
KEY EVENTS ALLOWED

2
MONTHS KEPT

Those four numbers are Google's, not ours. Two of them are the threshold a property has to clear before Google will model the traffic that consent screens hide. The third is the cap on how many actions a standard property can call important. The fourth is how long the raw data behind an exploration might last. A business with forty leads a month clears none of the first two and runs into the last one every quarter.

THE SHIFT THIS GUIDE IS ASKING FOR

Traffic is an input. Booked revenue is the output. Everything between them is plumbing, and the plumbing is cheaper to fix than anyone selling you a platform wants to admit.

You do not need a data warehouse, a subscription or an analyst. You need one event that means a lead, one phone number that can be traced back to a source, and the habit of writing down the answer when a customer tells you how they found you.

None of that is a platform decision, which is why nobody sells it to you. It is an afternoon of your time and a spreadsheet you already own.

What GA4 will not tell you.

No agency resource says this part plainly, which is exactly why it is the page worth keeping. GA4 is a good product doing a job that is not quite your job. Here is the line between what it watched and what it worked out.

WHAT IT ACTUALLY OBSERVED

- That a browser loaded a page, and which page.
- That a form was submitted, if the form is one it can see.
- The referrer or the campaign tags on the link that brought the visit in.
- The sequence of pages inside a single session.

WHAT IT ESTIMATED, HID OR NEVER SAW

- Key events it did not observe. Google models them and reports them in the same column, unlabelled.
- Rows it will not print at all, because a data threshold applied. Google states these are system defined and you cannot adjust them.
- Anyone who declined the cookie banner, unless your property is large enough for modelling.
- Every phone call. Every text. Every walk-in. Every referral from a customer who never searched for you.
- Whether any of it turned into money.

The last two are the ones that matter for a service business. Modelling has an entry price. Google publishes it: a property needs at least 1,000 events a day with analytics storage denied for at least 7 days, and at least 1,000 daily users sending events with consent granted on 7 of the previous 28 days. If you are reading this, you do not clear that. Which means the visitors who decline your banner are not modelled and not estimated. They are simply gone, and nothing in the interface says so.

THE HONEST VERSION

GA4 can tell you how people behaved on your website. It cannot tell you who became a customer, because it never sees your bank account and it never hears your phone ring.

That is not a flaw. It is a boundary. The work is not making GA4 answer a question it was never built to answer. The work is putting one number on each side of the boundary and comparing them once a month.

Anyone who tells you a tracking setup can close that boundary completely is selling you something. Anyone who tells you it cannot be narrowed is selling you something else. It can be narrowed a long way, and the next four pages are how.

A reported conversion is not a real one.

Five things sit between the figure in the report and a job on your calendar. None of them are visible in the number itself. All five are documented by Google and none are secret. They are simply never mentioned in the deck.

The report says 12 conversions
Once per event counts a key event every time it is triggered. One person who submits the form three times is three conversions. Google labels the alternative, Once per session, as Legacy.

The report says conversions, with no asterisk
Core reports blend modelled key events with observed ones in the same column. Nothing in the interface marks which is which, and no setting will separate them for you.

The report shows no data for a page you know converts
A data threshold withholds the row rather than showing a small number. Google states thresholds are system defined and cannot be adjusted.

The report says direct traffic, 41 percent
Direct means the source is (direct) and the medium is (none). Unassigned is the separate bucket for traffic that matched no channel rule at all. Neither is a place customers come from.

The report shows nothing before June
Event level data on a standard property is kept for 2 months or 14 months depending on one setting. Explorations stop where it stops. Standard aggregated reports do not.

Two more worth knowing, because they change the number without anyone touching the website. Changing the reporting attribution model applies to historical and future data, so last quarter can move overnight. Changing the lookback window does not: that applies going forward only. The default lookback for most key events is 90 days, with 30 and 60 available, and Google widened this again on 11 August 2026 to allow custom windows of 1 to 90 days.

WHAT TO DO WITH THIS

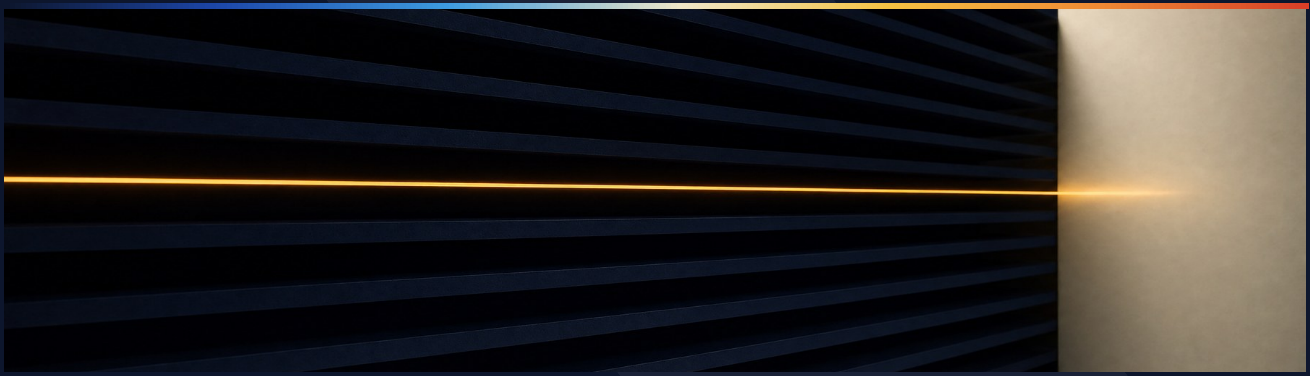
Stop treating the conversion count as a headcount. Treat it as a directional signal that is right about which channels are working and wrong about how many.

The count of people who actually hired you lives somewhere else. Page 10 is where you build it, and it takes six columns and ten minutes a week.

The useful question is never how many conversions. It is which channel keeps showing up next to the jobs you actually booked.

What you can fix in one afternoon.

Two things. One event that means a lead, defined the way Google expects it, and one phone number that can be traced back to a source. Fourteen boxes across the next two pages. No developer, no new subscription, no migration.



The order matters

- Do the event first. It is the harder one and it is the one your ads platform needs.
- Do the phone number second, the same day. A form-only setup measures the quieter half of your leads.
- Do not start the ledger until both are live, or you will be reconciling against a number you already know is wrong.

What is out of scope

- Server-side tagging, a CDP, offline conversion imports and a data warehouse are all real answers to this problem.
- They are also the point where you hire somebody. If a task cannot be finished by a non-technical owner in an afternoon, it is not in the checklist. It is in a panel telling you when it is worth paying for.

THE TEST THAT ENDS THE ARGUMENT

Submit your own form from your own phone, on mobile data rather than the office wifi. Then go and find yourself in the report the next day.

If you cannot find your own submission, the numbers in your monthly report are not describing anyone at all. That single test settles more disputes than any audit, it costs you about four minutes of a working day, and it needs no login to anything you do not already own.

Repeat it once a quarter. Forms get swapped, plugins update and tags get dropped, and nothing anywhere warns you when they do.

One event, defined properly.

Seven boxes. Work down them in order, because each one assumes the one above it is done. Allow up to 24 hours before a newly marked key event shows up in standard reports. Realtime updates within minutes.

Setup 01 · The lead event

- [ ] 1. Your site carries exactly one Google tag, and you know its measurement ID
  In GA4: Admin, Data streams, click your web stream. The ID starts with G. Now view the source of your home page and search for it. Two different IDs means two tags and doubled numbers.
- [ ] 2. Submitting your own form produces an event you can watch arrive
  Open tagassistant.google.com, connect your site, submit the form, then open Admin, Data display, DebugView. The seconds stream shows events from the last 60 seconds.
- [ ] 3. The event is called generate_lead, not the name your form tool invented
  Google's own definition: an event that signifies a user has submitted a form to indicate interest in a product or service. Use the standard name and every tool downstream understands it without being configured.
- [ ] 4. The event carries a value and a currency
  Google's reference is explicit that currency is required if you set value. Use USD and your average booked job value, not your average invoice and not your best month.
- [ ] 5. generate_lead is marked as a key event
  Admin, Events, then click the star beside the event. A standard property allows up to 30 key events, so spend them on things you would put in a sentence about revenue.
- [ ] 6. Its counting method is Once per event, not Once per session
  Admin, Key events, the row menu, Change counting method. Google labels Once per session as Legacy. Changes apply to future data only, never to what is already recorded.
- [ ] 7. You found your own test submission in a standard report the next day
  Acquisition, Traffic acquisition, then add Key events to the table. If your own lead is not there 24 hours later, something above this line is not done.

WHEN TO HIRE SOMEBODY INSTEAD

If your forms sit inside an embedded booking tool, a chat widget or a third-party scheduler on another domain, the event will not fire from your pages and no amount of clicking will make it.

That is a real tagging job, not an afternoon of your own time. It is also the single most common reason that a site appears to generate no leads at all while the phone in the office keeps ringing, and it is worth paying to fix properly once.

Ask for it by name: cross-domain measurement, or an event pushed from the booking tool. Both are ordinary work, and neither is a new platform.

One number that is actually tracked.

For most service businesses the phone outsells the form and is measured worse. Seven boxes. The first three are the ones almost nobody has checked, and the last one has changed since you probably last looked.

Setup 02 · The tracked call

- [ ] 8. You know whether the number on your site is a link or plain text
  Open your site on your phone and tap the number. If nothing happens, it is plain text, and no measurement product on earth is counting it.
- [ ] 9. You know that taps on that link are not in GA4 by default
  Enhanced measurement counts an outbound click as a click on a link that leads away from your domain to another website. A tel: link is neither, so it is not collected unless somebody set it up.
- [ ] 10. One tracked number, used in exactly one place
  A number is only evidence if it appears in one channel. The website gets one. The vans, the flyers and the Business Profile keep their own.
- [ ] 11. The tracked number reaches the same phone a customer would reach
  Call it yourself from a phone that is not in the office. If it rings out or lands in a mailbox nobody empties, stop the whole project and fix that first. It is worth more than the tracking.
- [ ] 12. You set a minimum call length before a call counts
  Google Ads counts a call as a conversion when it lasts longer than a minimum you set. Sixty seconds clears wrong numbers and hang-ups. Under thirty seconds you are counting noise as revenue.
- [ ] 13. Whoever answers writes down what the caller says about finding you
  One question at the end of the call. How did you find us. Then the answer goes in the same place every time. This is column five on page 10.
- [ ] 14. You know the Calls figure in your Business Profile counts button taps
  Google defines it as the number of times a customer clicked the call button. A tap is not a conversation. Call history inside Business Profile was switched off on 31 July 2024, so that record no longer exists at all.

WHAT A FORWARDING NUMBER ACTUALLY DOES

Google Ads call reporting swaps your number for a Google forwarding number, but only for visitors who arrived by clicking an ad, and only on the Search Network.

So it answers a narrow question well and a broad one not at all. Calls from organic search, from the map pack, from a referral or from somebody who typed your name are not in it.

Paid call tracking that swaps the number for every visitor is the upgrade, and it is the one paid tool on this list worth the money. Until then, box thirteen does the same job for free and slightly worse, and a person writing down what a caller said has never once been deprecated by a platform update.

Your last ten customers.

This is the part that makes the other nine pages pay. Six columns in a spreadsheet, filled in weekly, beats every dashboard you have been sent, because it is the only record that contains both where somebody came from and whether they paid you.

COLUMN	WHAT GOES IN IT	WHERE IT COMES FROM
Date	The day they first made contact	Your inbox or phone
Name	Who it was	Obvious, and skipped anyway
How they reached you	Form, call, text, walk-in	You already know
Said source	Their answer to how did you find us	You ask them
Measured source	What the analytics claims	GA4 or call tracking
Booked	Yes, no, or the amount	Your invoices

WHY TWO SOURCE COLUMNS AND NOT ONE

Because they disagree, and the disagreement is the most useful thing in the sheet. Self-reported answers are vague and generous to whatever the customer remembers last. Analytics is precise and blind to half your leads.

Run both for three months and the pattern shows up fast. Where they agree, you can trust the channel. Where the customer says a referral and the tracking says organic search, you have learned that your search rankings are closing referrals rather than creating demand, which changes what you should spend on.

Ten rows beat a dashboard.

Ten completed rows is enough to change a decision. Not a hundred, not a statistically clean sample. Ten. Here is what to do the first time the sheet is full, and what each answer means.

Read it in this order

- Count the booked rows. That is your real lead count, and it will not match your report.
- Group the booked rows by said source. That is where your revenue comes from.
- Group every row by said source and compare. The gap is where enquiries arrive and never close.

What the answers mean

- Booked work is mostly referral, website leads are thin: the site is a credibility check, not a lead source.
- Plenty of leads, few booked: not a marketing problem. Look at how fast the phone gets answered.
- Said source names a channel the tracking never shows: that channel is invisible in every report you get, ours included.

THREE ROWS FROM A REAL SHEET

SAID SOURCE	MEASURED SOURCE	BOOKED	WHAT IT TELLS YOU
Saw your van	Direct	$2,400	Offline demand that a page closed
Googled you	Unassigned	$0	Unlabelled, so no report shows it
Friend told me	Organic search	$6,150	Search confirmed, referral created it

One rule keeps the sheet honest. Fill in the said source column before you look at the analytics, never after. Once you have seen what the tracking claims, you will file ambiguous answers to match it without noticing, and the only independent check you own stops being independent.

TEN MINUTES A WEEK, AND WHY IT HOLDS

This survives staff changes, platform changes, consent rules and whatever Google renames next. It is yours, it is offline, and no vendor can deprecate it.

Business Profile call history was switched off on 31 July 2024 and took the stored records with it. Google left a one month export window, until 30 August 2024, and anyone who missed it lost the only record they had of who called and when. A vendor can do that at any time.

A spreadsheet does not do that. It is the least impressive part of this guide and the last part of it to stop working, on any platform, under any privacy regime.

Reading the report you get sent.

Six boxes to run over the next report that lands in your inbox. This is written to be used on ours as much as anyone else's. A report that leads with impressions is answering a question you did not ask.

The six things a monthly report owes you

- [ ] 15. The first number on the page is leads, not sessions or impressions
  Impressions belong in the appendix. If they are on page one, ask why.
- [ ] 16. Every conversion figure says whether it was observed or modelled
  If nobody can answer this, they have not looked. Core reports combine both in one column without marking them.
- [ ] 17. The report names the attribution model and the lookback window
  These change the number without anything changing on the website. Changing the model rewrites history. Changing the window does not.
- [ ] 18. Phone calls appear in the same table as form fills
  Two separate tables means nobody has added them up, which means nobody knows the total.
- [ ] 19. The date range fits inside the property's data retention setting
  A year-on-year chart drawn from an exploration on a 2 month retention setting is drawing a line through data that no longer exists.
- [ ] 20. Somebody reconciled last month's leads against jobs you booked
  This is the whole job. If the answer is that nobody has, the report is a description of a website, not of a business.

IF THE REPORT OPENS WITH	ASK FOR THIS INSTEAD
Impressions and rankings	Leads, split by channel, for the same period
Conversions, one number	The same number with modelled and observed separated
Traffic up 34%	Booked jobs, and whether they moved with it

THE QUESTION TO ASK OUT LOUD

Of the leads in this report, how many became customers, and which ones.

There is a good honest answer, which is that the agency cannot know without your side of the ledger, and here is what they need from you to close it. There is also a bad answer, which is a longer chart. You now know which one you are hearing.

Ask it every month. The first time is awkward and the third time it is just how your reporting works.

Find out what is actually firing.

We will check what your tracking is recording, what it is quietly guessing at, and what it never sees. You get the findings whether you work with us or not, because a checklist you cannot verify is just homework.

What is firing

Every tag on the site, every event reaching the property, and whether anything is counted twice.

What is not

Forms that submit without an event, calls with no record, and third-party widgets swallowing leads.

What is guessed

Which figures in your current reporting are modelled, thresholded or missing rather than observed.

Your settings

Counting method, lookback window, attribution model, retention. The four that silently move your numbers.

A ledger to start

The six column sheet from page 10, set up with your channels already in it.

What it is worth

A plain answer on whether the next fix is an afternoon of yours or a job worth paying for.

FREE TRACKING AUDIT

Send us your domain. We check what is firing, what is not, and what your reports are quietly guessing at.

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