

LeanData Attribution

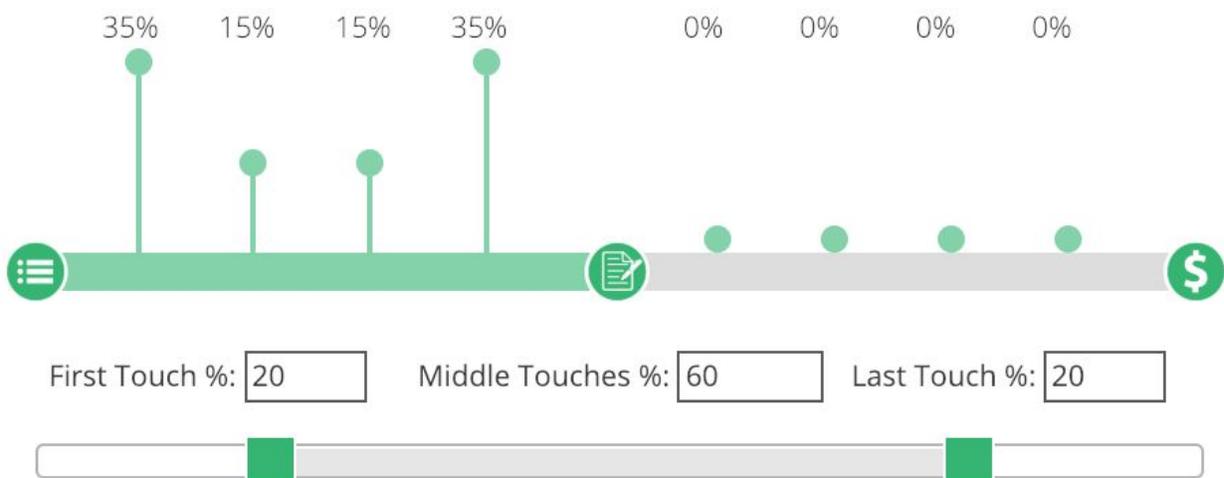
Custom Attribution Models



Overview	2
Create Fields for Custom Attribution Model	3
Create Custom Attribution Model	3

Overview

LeanData Custom Attribution Models feature allows users to create their own attribution models with custom weightings and distribution. This allows greater flexibility in calculating the attribution data relevant for your business operations.



- Allow users to choose between different base distributions.
- Allow users to choose between different coverages.
- Allow users to choose Marketing Touch Field to allocate custom Attribution Amount (Only non-LeanData currency type custom fields will be shown).
 - Field must be created on both Marketing Touch and Temporary Marketing Touch object.
- Allow users to choose Campaign RollUp Field to add accumulate all associated Attribution Amounts (Only non-LeanData and currency type custom fields will be shown).
- Allow users to customize the percentage of FT/MT/LT percentages down to 1 decimal place.
- Allow users to pick from multiple popular templates, such as
 - U-Shape
 - W-Shape
 - Multi Touch

- Generated (Pre-Opportunity Creation) vs Accelerated (Post Opportunity Creation)

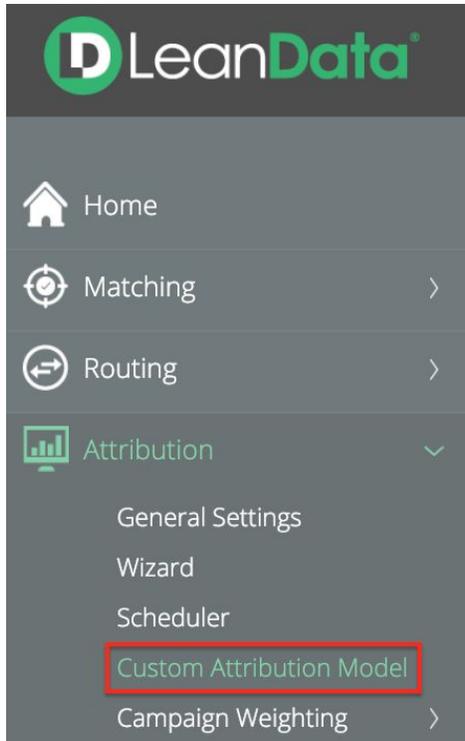
Create Fields for Custom Attribution Model

By default, the LeanData package will not contain fields to receive the values populated from your custom attribution models. You will first have to create fields to capture these values on the Marketing Touch, Temporary Marketing Touch, and Campaign Objects.

1. Create a new custom field on the **Marketing Touch** and **Temporary Marketing Touch** Objects.
 - Navigate to Setup > Create > Objects > Marketing Touch
 - Create new custom currency field to be populated with the attribution amount.
 - Name the field according to your custom model (ex. “U-Shaped Generated Attribution Amount”)
 - Repeat this process for the Temporary Marketing Touch Object
2. Create a new custom field on the Campaign Object to receive the aggregate attribution amounts for this attribution model.
 - Navigate to Setup > Campaign > Fields
 - Create new custom currency field to be populated with the sum of the attribution value using this attribution model for all marketing touches associated with this campaign.

Create Custom Attribution Model

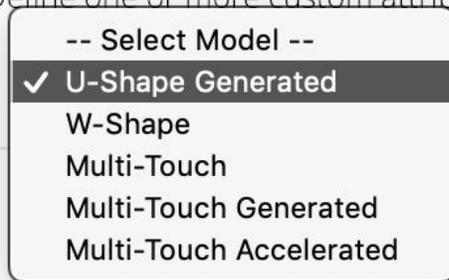
In the LeanData Dashboard, navigate to the Custom Attribution Model page.



In the dropdown at the top of the page select a template for the type of model you would like to create:

Custom Attribution Models

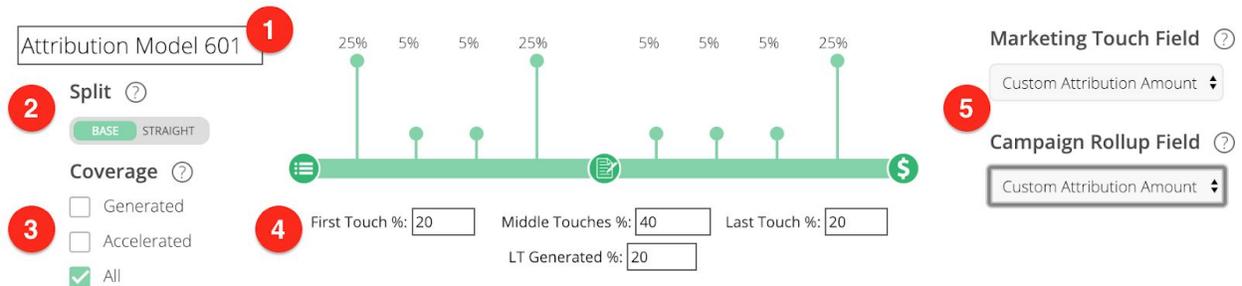
Define one or more custom attribution models below. Multiple



- **U-Shape Generated**
 - Distributes Attribution among Pre-Opportunity Touches, with greater weighting given towards the first touch and last touch before opportunity creation
- **W-Shape**
 - Distributes Attribution among all touches, with greater weighting given towards the first touch, last touch before opportunity creation, and last touch overall
- **Multi-Touch**
 - Distributes Attribution among all touches

- **Multi-Touch Generated**
 - Distributes Attribution among Pre-Opportunity Touches
- **Multi-Touch Accelerated**
 - Distributes Attribution among Post-Opportunity Touches

After selecting your template, configure your Custom Attribution Model settings:



1. **Name:** Name your Custom Attribution Model
2. **Split:** Choose between a Base or Straight split
 - a. Base: Will calculate a base percentage and add the amount allocated to First Touch, Last Touch Generated, and Last Touch. This ensures that these specific touches will always have a greater percentage than any middle touches, regardless of how many middle touches there may be.
 - b. Straight: Will take the percentages as entered. This may lead to middle touches receiving greater attribution weight than anticipated in the case of opportunities with few middle touches.
3. **Coverage:** Choose which portion of the Opportunity timeline is relevant for this model
 - a. Generated: Only include Pre-Opportunity Touches
 - b. Accelerated: Only include Post-Opportunity Touches
 - c. All: Include all touches across the entire Opportunity timeline
4. **Percentages:** Enter the percentages you would like to attribute to each of the touches
5. **Custom Field Selection:** Pick the custom fields you created on the Marketing Touch, Temporary Marketing Touch, and Campaign Objects that you would like to populate for this particular custom attribution model.

These Custom Attribution Fields will be calculated during the next Attribution Batch run. You will have to add your new fields to any reports you are using to view Attribution data.