LeanData Attribution

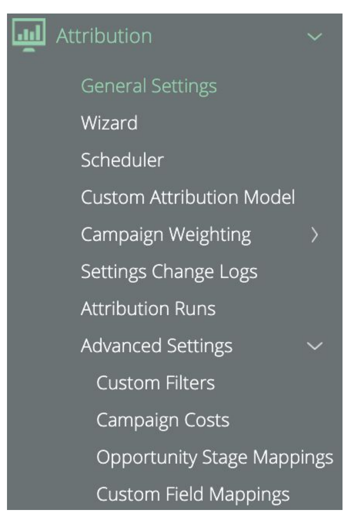
General Settings Guide

Overview

The purpose of this guide is to help LeanData Attribution customers configure their Attribution General Settings. After setting up the Attribution Wizard, making changes to the General Settings page is the next step in configuring your Attribution data. Understanding the General Settings page will help you get the most of your Attribution data.

Finding Attribution General Settings

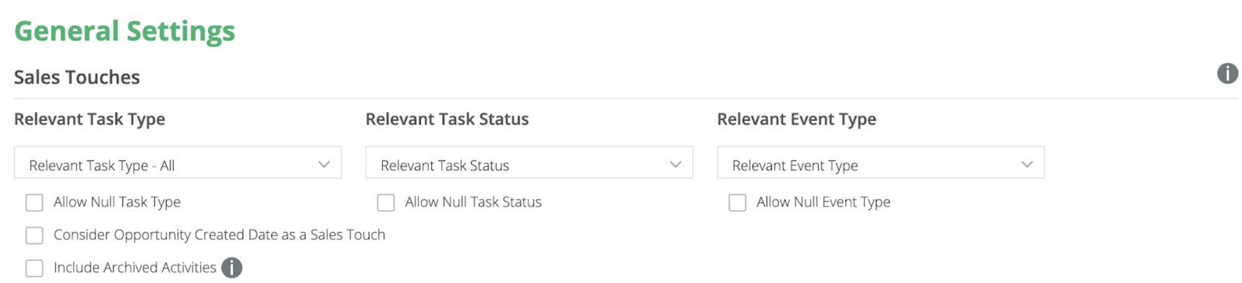
To find Attribution Settings, open the LeanData tab within your Salesforce instance. Once in LeanData, navigate to Attribution → General Settings in the left sidebar:



Sales Touches

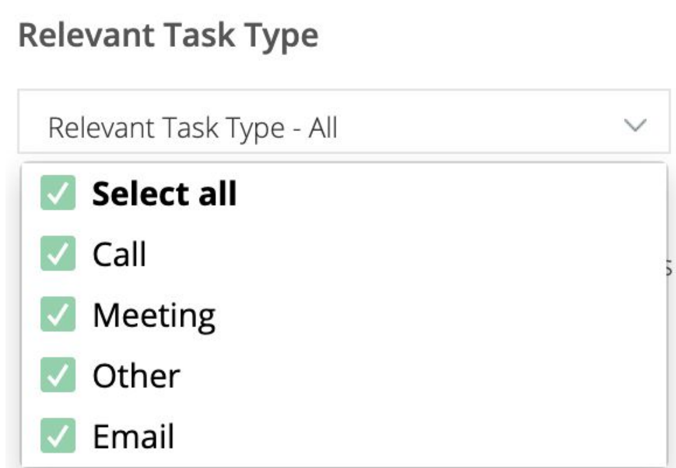
The first section on the General Settings page is for configuring Sales Touches. You can define relevant Sales Touches within this section. This has two primary applications:

1. Including Sales Touches on the Opportunity Buyer's Journey Visualization
2. Categorize Marketing Touches as either Pre or Post Sales

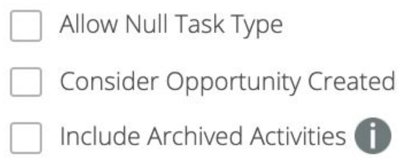


Filtering Sales Touches

Within **Relevant Task Type** you can choose the types of activities you want to define as Sales Touches. In the example below, all task types - call, meeting, etc. - are included, meaning all these task types are eligible to be included as a Sales Touch on the Buyer's Journey and for determining whether a Marketing Touch is Pre or Post Sales.

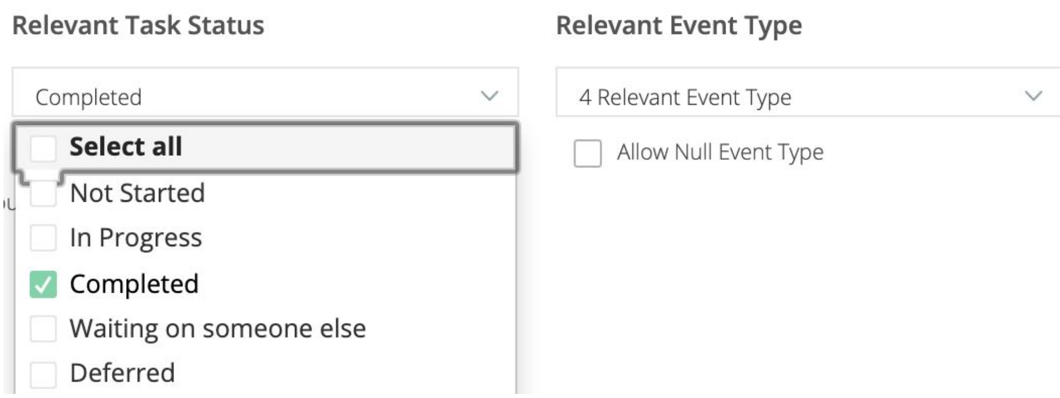


There are a few additional options below the dropdown:



Allow Null Task Type: Select this option if you wish to include tasks without a specified task type as a Sales Touch.
Consider Opportunity Created Date as Sales Touch: Select this option if you want the opportunity created date to be considered as a Sales Touch
Include Archived Activities: Salesforce will archive activities after a certain time period. Select this option if you would like to include those Salesforce-archived activities.

After Selecting the Task Types you wish to include, the other dropdowns will allow you to further select which Task Statuses within those Task types should be considered as relevant statuses, ss well as whether you wish to include any Event types.



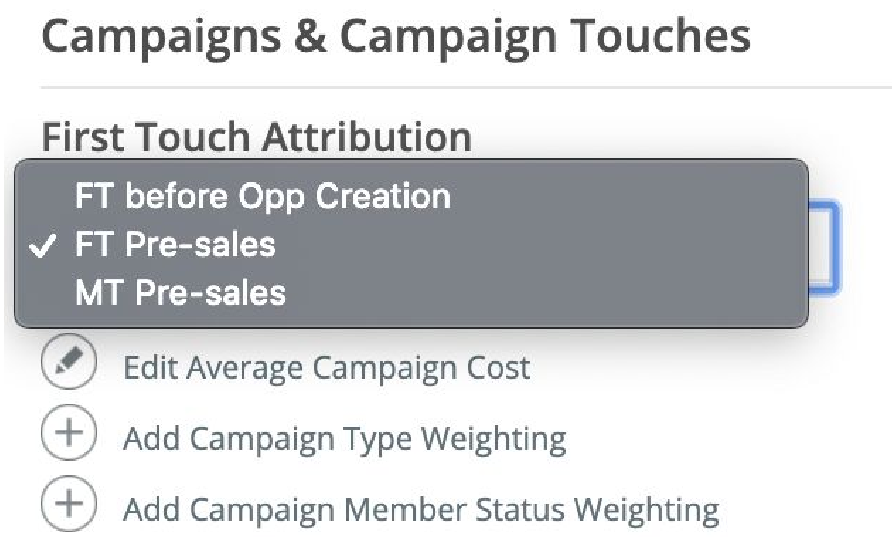
Campaigns and Campaign Touches

First Touch Attribution

Under ‘Campaigns & Campaign Touches,’ you are able to define how to determine First Touch Attribution for your organization. There are 3 options here:

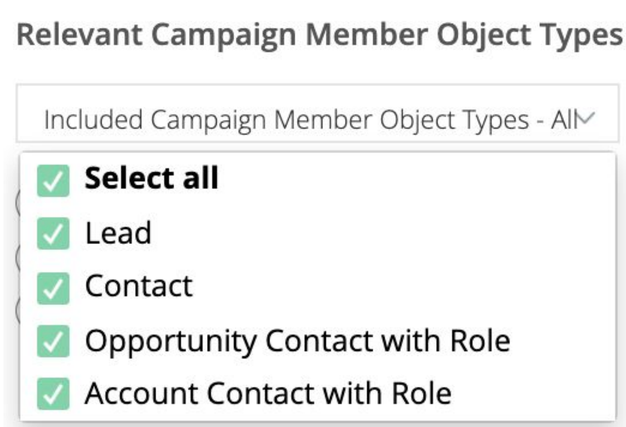
1. **FT before Opp Creation**: LeanData will look at all the Marketing Touches before the Opportunity was created and will assign 100% attribution to the very first interaction.
2. **FT Pre-Sales**: LeanData will attribute 100% attribution to the First Marketing Touch before a recorded Sales Touch, regardless of when the opportunity was created. A Marketing Touch that occurs after the first relevant Sales Touch cannot receive First Touch attribution using this option.

3. **MT Pre-Sales**: Similar to FT Pre-Sales, LeanData will look at all the marketing touches before a recorded Sales Touch, and will assign attribution value evenly across all those touches.



Relevant Campaign Member Object Types

If you would like to filter Marketing Touches by which object type the Campaign Member exists as, you can filter them using the dropdown here.



Average Campaign Cost

By default, LeanData will use the standard Actual Cost field on your campaigns to calculate metrics like Cost per Touch and ROI. If you would like to set a placeholder value to use in case the Actual Cost field is blank, you can use the Average Campaign Cost page to set average costs by Campaign Type.

Campaign Costs

Clear All Campaign Costs

Campaign Type	Cost
Advertising	$ 5,000.00
Advocacy	$ 1,000.00
Content	$ 4,000.00
Content Syndication	$ 10,000.00
Direct Mail	$ 2,000.00

Campaign Type / Campaign Member Status Weighting

In addition to the standard attribution values LeanData will calculate for First Touch, Multi-touch, and Last touch models, LeanData will also calculate a weighted version in a separate field. You can set weightings by Campaign Type and then additionally by Campaign Member Status.

Campaign Weighting

Campaign Types

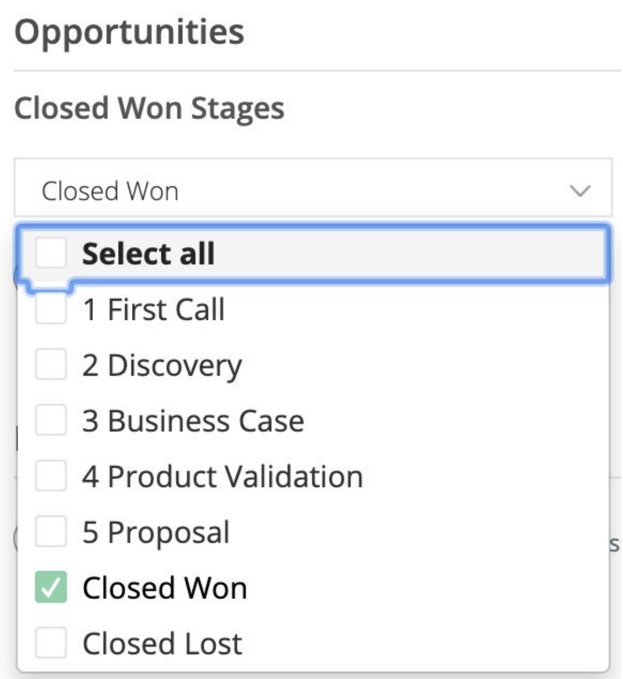
Custom weighting for Campaign : ON OFF

Campaign Type	Weighting Value
Advertising	0 1 2 3 4 **5** 6
Advocacy	0 1 **2** 3 4 5 6
Content	0 1 2 3 **4** 5 6
Content Syndication	0 1 2 3 **4** 5 6
Direct Mail	0 1 **2** 3 4 5 6

Note: You must have Campaign Type Weighting enabled first in order to access Campaign Member Status Weightings.

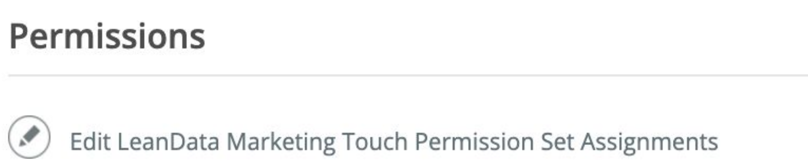
Opportunities | Closed Won Stages

If your organization uses multiple stages that can be considered "Closed Won", you can select those stage names here. This helps LeanData map the correct Closed Won Stages for Attribution.



Permissions

Under **Permissions**, you are able to give members of your organization the ability to view Attribution Settings and also create/view reports generated from the Marketing Touch custom object. To give permission to your admins, you will have to click the **Add LeanData Marketing Touch Permission Set** button. This will create the appropriate permission set in your system. After adding this permission set, this button will change to **Edit LeanData Marketing Touch Permission Set Assignments**.



Once you click the edit button, LeanData will take you to a native Salesforce page that lists all assigned users and will also provide you with the option to give this permission set to additional users.