

LeanData Attribution

Marketing Influenced Win Rates
Attribution Report



Overview

See how marketing campaigns and programs influence Win Rates so you can drive programs that increase the velocity to close opportunities.

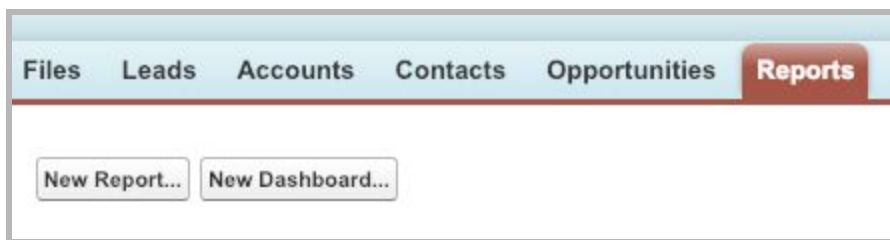
Actionable Insights:

- Verify which campaigns generate the fastest win rates.
- Test and confirm what campaigns you expect to best influence sales win rates.

Steps to Create Report

1. Create Report

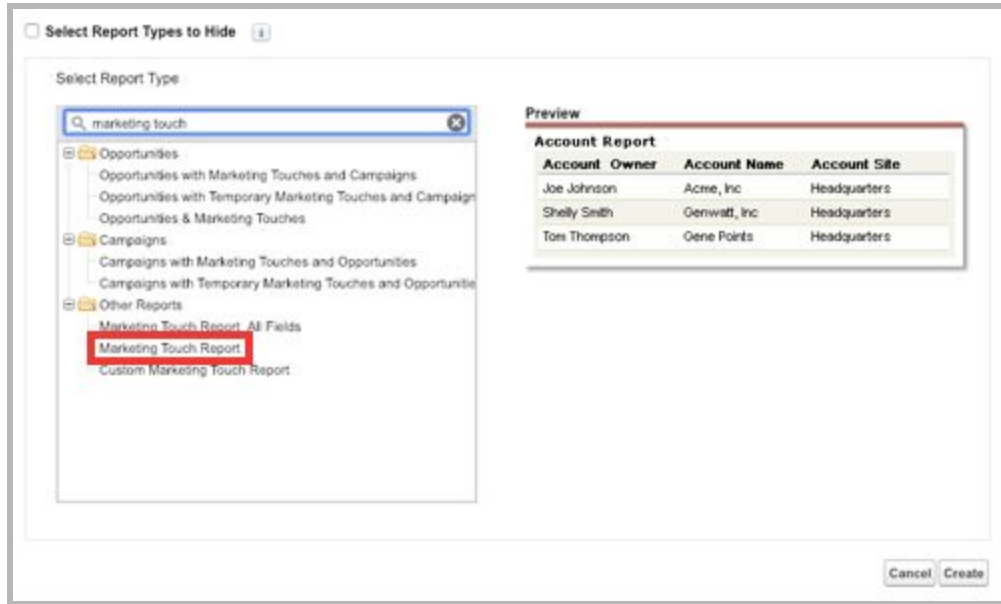
Click on the “Reports” tab and then click “New Report”



2. Create Marketing Touch report

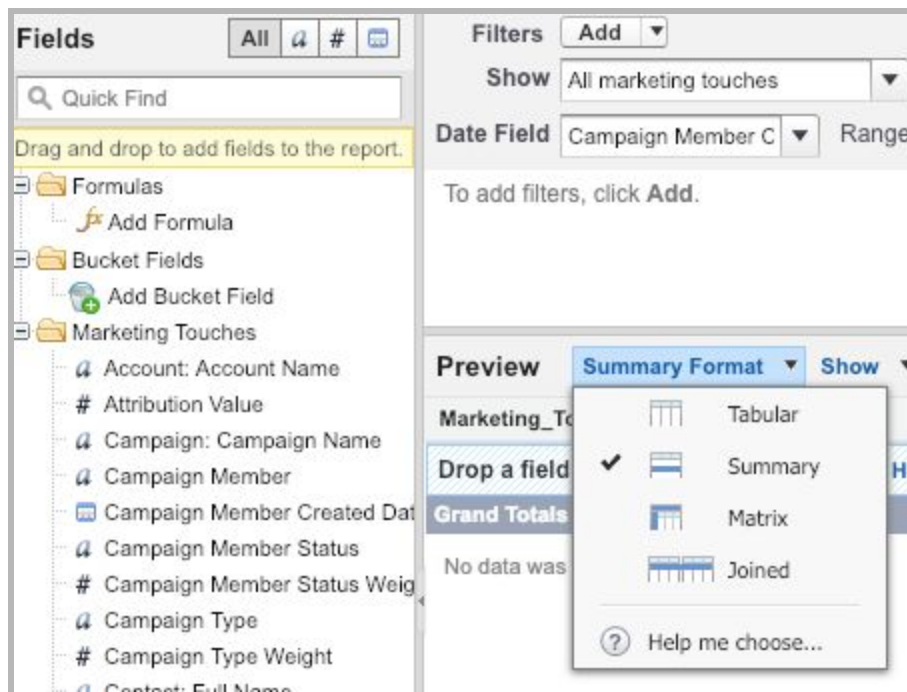
Select Marketing Touch report and then click “Create Report”

Please note that in order to create a custom attribution report with LeanData, you must first create it through the included “Marketing Touch Report”.



3. Create Marketing Influenced Win Rates formula

Change the report type to Summary.



Next, click on “**Add Formula**” on the left-hand side under “**Fields**”.

Insert the following inputs into the below fields:

- **Column Name:** Win Rates
- **Format:** Percent, 0 Decimals, All Summary Levels
- **Formula:**

$$\frac{\text{LeanData_Marketing_Touch_c.LeanData_MT_Attribution_Amount_c:SUM}}{\text{LeanData_Marketing_Touch_c.LeanData_Cost_Per_Touch_c:SUM}}$$

Click "OK" to insert the formula into the report

Custom Summary Formula
Help for this Page

Column Name:

Description:

Format: Percent Decimal Places: 0

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels

Grand summary only

Formula

Summary Fields ▾ Operators ▾

$$\frac{\text{LeanData_Marketing_Touch_c.LeanData_Closed_Win_c:SUM}}{\text{LeanData_Marketing_Touch_c.LeanData_Opportunity_c.One_c:SUM}}$$

Functions

All ABS

ABS(number)

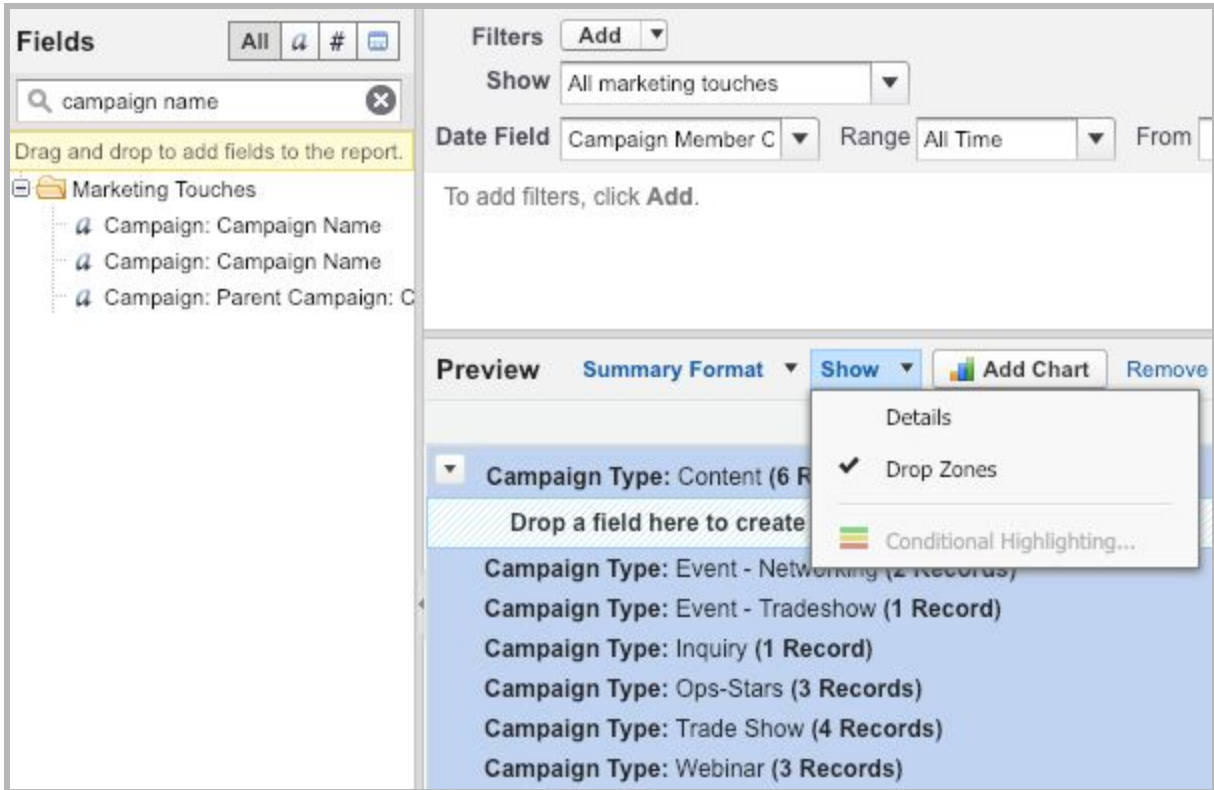
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

4. Insert Campaign Fields

After inserting the formula, add the following two Campaign fields to the summary table:

- Campaign Type
- Campaign Name (Add to Campaign Type to create grouping)



Fields All *a* #

Search: campaign name

Drag and drop to add fields to the report.

- Marketing Touches
 - Campaign: Campaign Name
 - Campaign: Campaign Name
 - Campaign: Parent Campaign: C

Filters Add

Show: All marketing touches

Date Field: Campaign Member C Range: All Time From:

To add filters, click Add.

Preview Summary Format Show Add Chart Remove

- Campaign Type: Content (6 Records)
 - Drop a field here to create
 - Campaign Type: Event - Networking (2 Records)
 - Campaign Type: Event - Tradeshow (1 Record)
 - Campaign Type: Inquiry (1 Record)
 - Campaign Type: Ops-Stars (3 Records)
 - Campaign Type: Trade Show (4 Records)
 - Campaign Type: Webinar (3 Records)

Context menu for 'Campaign Type: Content (6 Records)':

- Details
- Drop Zones
- Conditional Highlighting...

5. Run Report

Run the report and explore your Attribution. See if you can identify which marketing campaigns had the highest influence on closed opportunities.

<input type="checkbox"/> Campaign Type ↑ ▾	Campaign: Campaign Name ↑ ▾	Record Count
<input type="checkbox"/> Content Syndication	Syndication - ReachNetwork 17Q4	1
	Subtotal	1
<input type="checkbox"/> Direct Mail	ABM Door Opener	4
	Subtotal	4
<input type="checkbox"/> Event - Field	Event - Field - 1802 - Saastr Executive Luncheon	1
	Event - Field - 1804 - Fogo Prospect Lunch	4
	Subtotal	5
<input type="checkbox"/> Event - Networking	1708 - Roadshow - San Francisco	2
	1710 - Roadshow - NYC	2
	Event - Networking - 1803 - TOPO Summit Wi...	1
	Subtotal	5
<input type="checkbox"/> Event - Tradeshow	1805 SiriusDecisions Main Show	1
	Event - Tradeshow - 1803 - Rainmaker by Sale...	4
	Event - Tradeshow - 1803 Revenue Summit	1
	Event - Tradeshow - 1803 - Sales 3.0	2
	Event - Tradeshow - 1804 - Marketing Nation ...	4
	Event - Tradeshow - 1804 - MarTech West	1