

LeanData Attribution

Revenue Attribution Report



Overview

See how marketing campaigns and programs influence Revenue Attribution so you can drive more programs that close opportunities

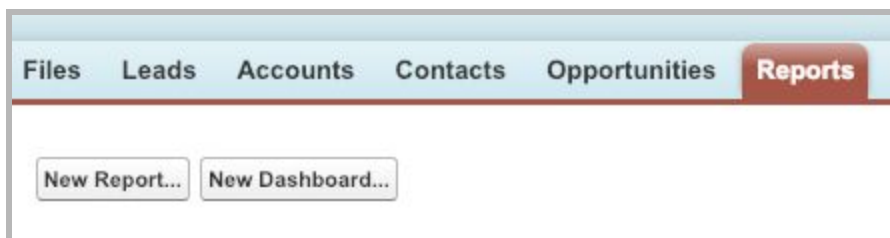
Actionable Insights:

- Verify which campaigns generate the most Revenue Attribution for bookings.
- Test and confirm how long and how many touches campaigns need to drive Revenue Attribution

Steps to Create Report

1. Create Report

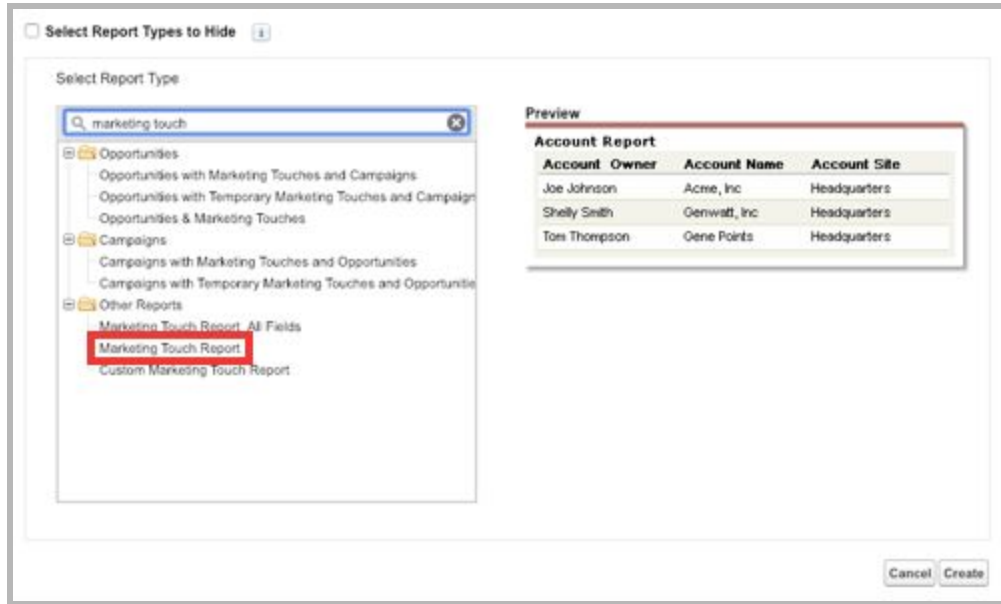
Click on the “Reports” tab and then click “New Report”



2. Create Marketing Touch report

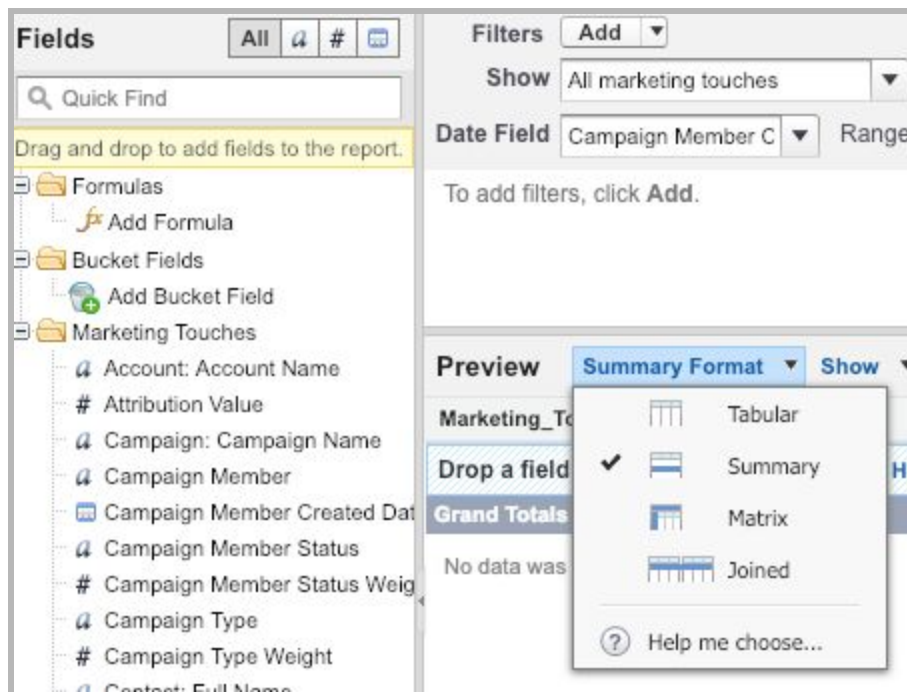
Select Marketing Touch report and then click “Create Report”

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 Revenue Attribution 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:** Revenue Attribution
- **Format:** Percent, 0 Decimals, All Summary Levels
- **Formula:**

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

Click “OK” to insert the formula into the report

Custom Summary Formula
Help for this Page

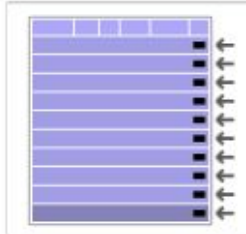
Column Name:

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	Functions	Tips
<div style="display: flex; justify-content: space-between; align-items: center;"> Summary Fields ▼ Operators ▼ Check Syntax </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> $\frac{\text{LeanData_Marketing_Touch_c.LeanData_Opportunity_c.IsWon:SUM}}{\text{LeanData_Marketing_Touch_c.LeanData_Opportunity_c.One_c:SUM}}$ </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> All ▼ ABS ▼ </div> <p>ABS(number)</p> <p>Returns the absolute value of a number, a number without its sign</p>	Help on this function

Error: This field is required

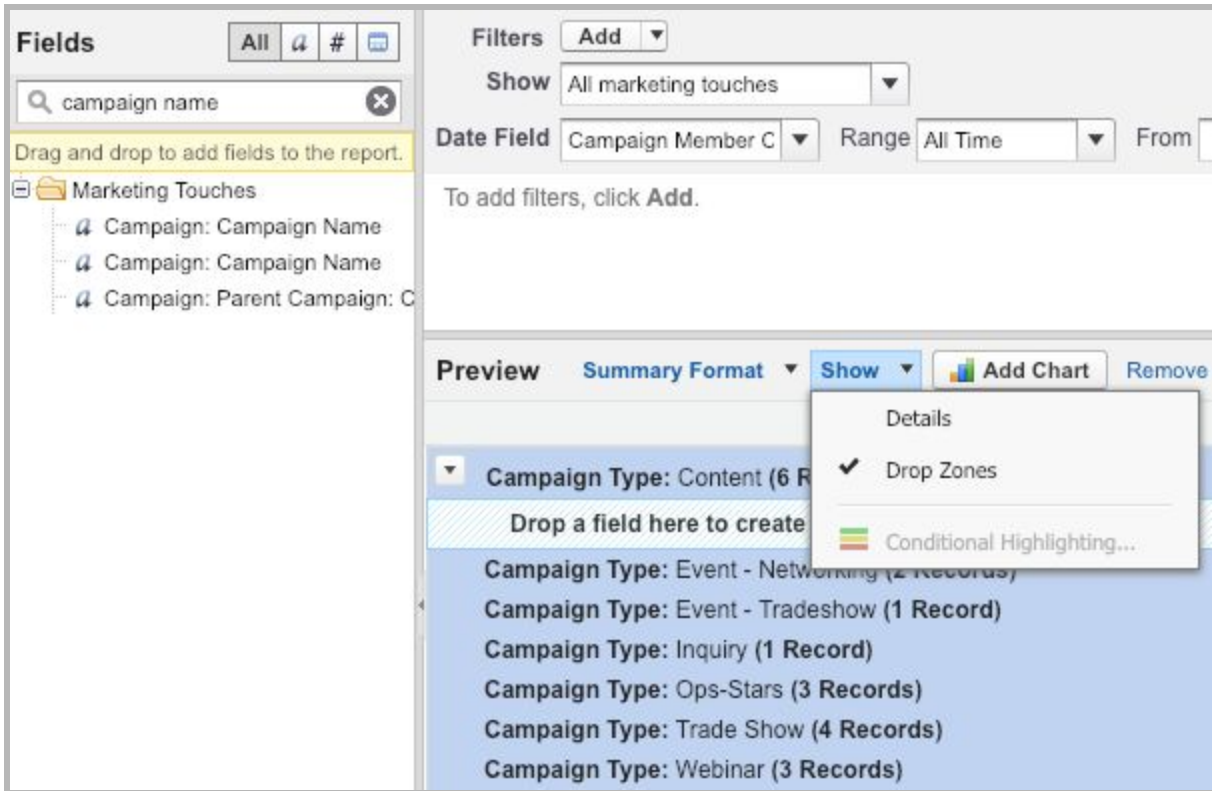
OK Cancel

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)



5. Run Report

Run the report and explore your Attribution. See if you can identify which campaigns have the highest revenue attribution for bookings.

<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