

LeanData Attribution

Campaign ROI Attribution Report



Overview

Understand the bottom line take away from your marketing efforts so you can spend smarter. Measure Return on Investment (ROI) on individual campaigns or marketing channels and analyze data by account segments, product lines, and other relevant data points.

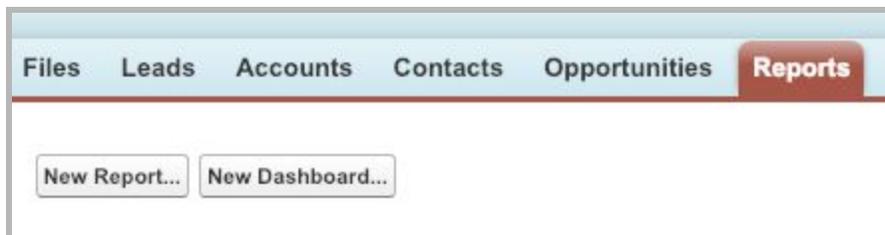
Actionable Insights:

- Verify whether high-cost campaigns are generating the expected ROI.
- Determine what cohorts of your business (*i.e. Enterprise vs. Mid-Market*) have a higher ROI from particular campaigns or channels.

Steps to Create Report

1. Create Report

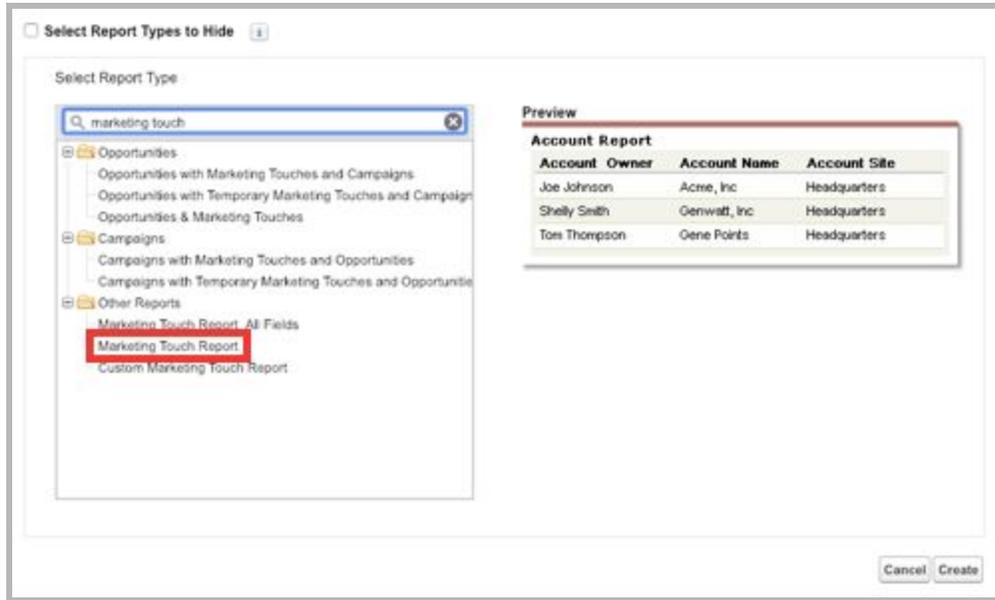
Click on the “Reports” tab and then click “New Report”



2. Create Marketing Touch report

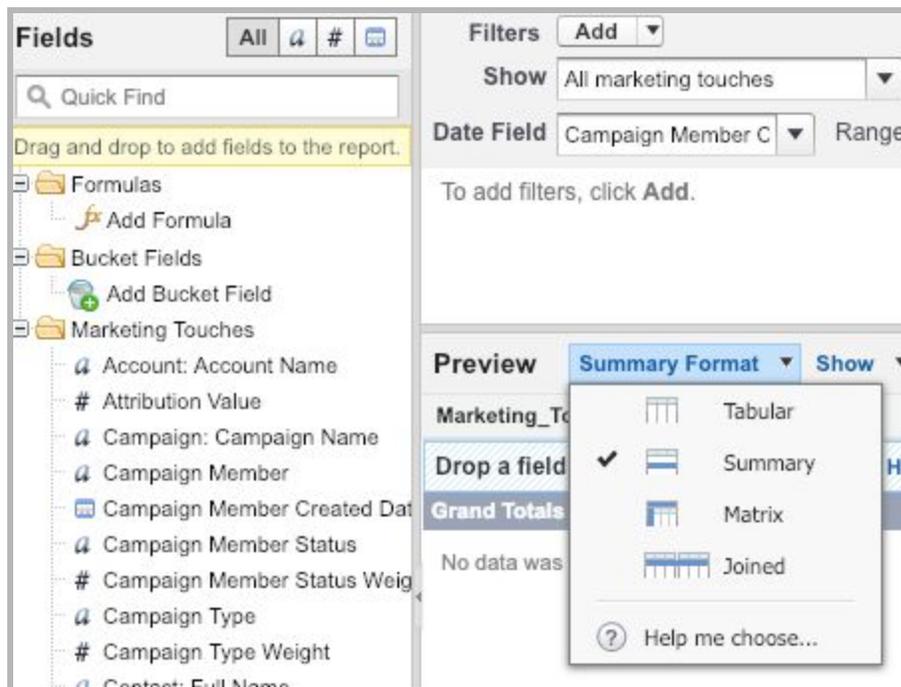
Select Marketing Touch report and then click “Create Report”

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 Campaign ROI formula

Change the report type to Summary.



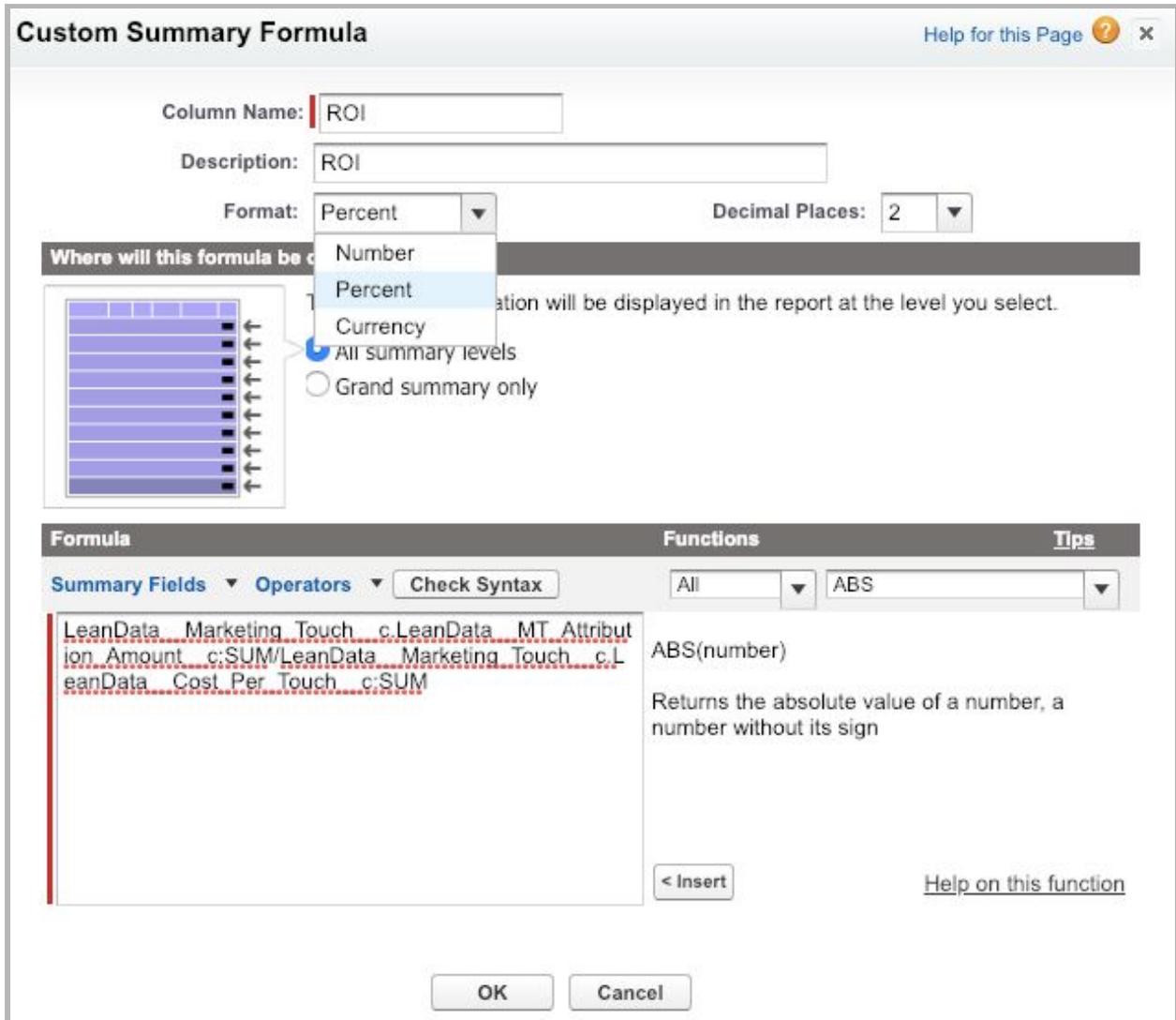
Next, click on “**Add Formula**” on the left-hand side under “**Fields**”.

Insert the following inputs into the below fields:

- **Column Name:** ROI
- **Format:** Percent, 2 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 ? x

Column Name:

Description:

Format: Decimal Places:

Where will this formula be displayed?

- Number
- Percent
- Currency
- All summary levels
- Grand summary only

Information will be displayed in the report at the level you select.

Formula **Functions** **Tips**

Summary Fields ▾ Operators ▾

LeanData_Marketing_Touch_c.LeanData_MT_Attribution_Amount_c:SUM/LeanData_Marketing_Touch_c.LeanData_Cost_Per_Touch_c:SUM

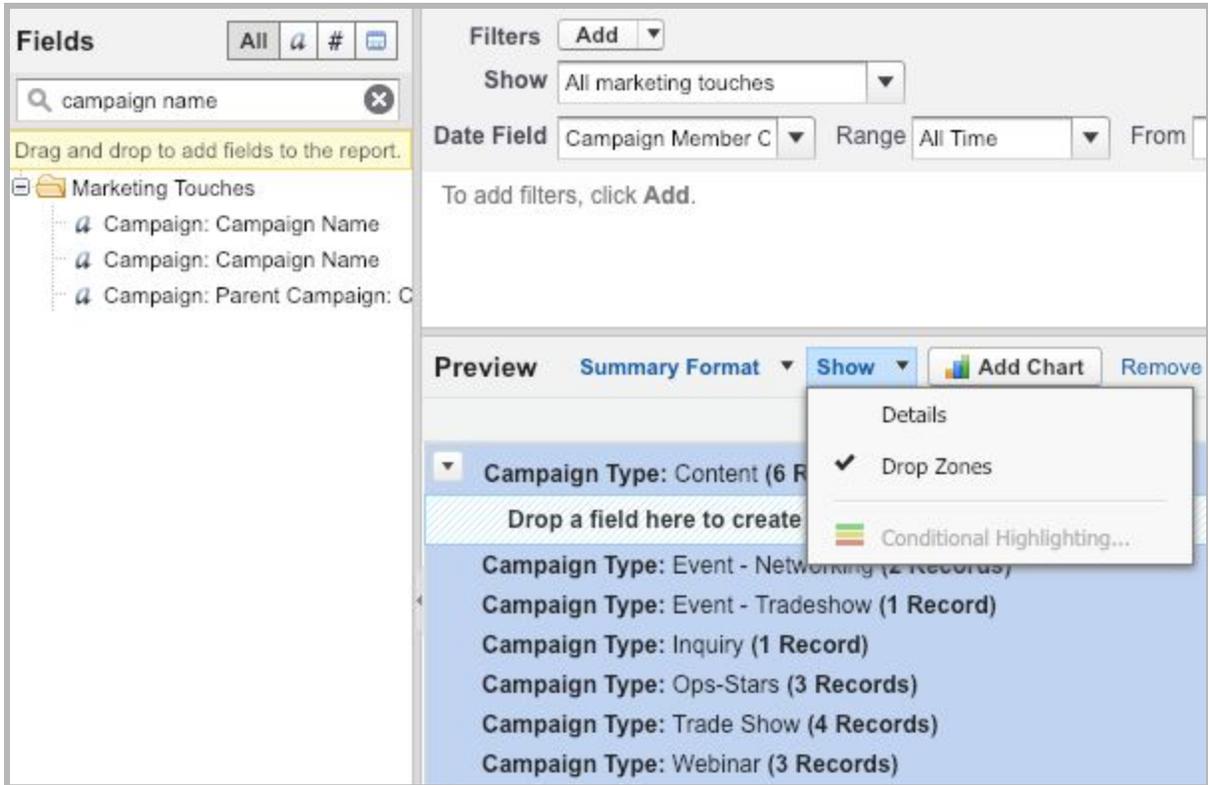
ABS(number)
Returns the absolute value of a number, a number without its sign

[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 # [icon]

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 options: Details, Drop Zones, Conditional Highlighting...

5. Run Report

Run the report and explore your Attribution. See if you can identify which campaigns generated the most campaign ROI against 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