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"

Files Lo	eads	Accounts	Contacts	Opportunities	Reports
New Pop	ort	lew Dashboard	1		

2. Create Marketing Touch report

Select Marketing Touch report and then click "Create Report"

<u>Please note that in order to create a custom attribution report with LeanData, you must</u> <u>first create it through the included "Marketing Touch Report".</u>



Q, marketing touch	8	Preview		
B 🔐 Opportunities		Account Report Account Owner	Account Name	Account Site
Opportunities with Marketing Touches a	nd Campaigns	Joe Johnson	Acme, Inc	Headquarters
Opportunities & Marketing Touches	Looping and campage	Shelly Smith	Genwatt, Inc	Headquarters
Campaigns Campaigns with Marketing Touches an Campaigns with Temporary Marketing Touches Marketing Touches an Marketing Touch Report Custom Marketing Touch Report Custom Marketing Touch Report	3 Opportunities fouches and Opportunitie	Tom Thompson	Gene Points	Headquarters

3. Create Campaign ROI formula

Change the report type to Summary.

Fields All a # 🚍	Filters	Add 🔻			
Q Quick Find	Show	All marketing touches			
Drag and drop to add fields to the report.	Date Field	Campaign Member C 💌 Range			
Formulas f Add Formula f Add Formula f Add Bucket Field Add Bucket Field	To add filters, click Add.				
Account: Account Name	Preview	Summary Format V Show V			
# Attribution Value	Marketing_1	ro 🥅 Tabular			
<i>Q</i> Campaign: Campaign Name <i>Q</i> Campaign Member	Drop a fiel	d 🗸 🧮 Summary 📊			
Campaign Member Created Dat	Grand Total	Matrix			
Gampaign Member Status # Campaign Member Status Weig	No data was	s Joined			
Campaign Type Gampaign Type Weight Cantast: Full Name		(?) Help me choose			

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: LeanData_Marketing_Touch_c.LeanData_MT_Attribution_Amount_c:SUM/L eanData_Marketing_Touch_c.LeanData_Cost_Per_Touch_c:SUM

Click "OK" to insert the formula into the report

istom Summary For	mula			Help for this Page 🥑
Column Name:	ROI			
Description:	ROI			
Format:	Percent	-	Decimal Places:	2 🔻
Where will this formula be	Number Percent Currency	ation will be dis	played in the report at th	ne level you select.
Formula			Functions	Tips
Summary Fields V Operation	itors V Check S	Syntax	All 🗸 ABS	•
LeanData Marketing I ion Amount c:SUM/Le eanData Cost Per Tou	ouch c.LeanData anData Marketin Ich c:SUM	a MT Attribut ig Touch c.L	ABS(number) Returns the absolute v number without its sign	alue of a number, a

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 # 🚍	Filters Add V
Q campaign name	Show All marketing touches
Drag and drop to add fields to the report.	Date Field Campaign Member C 💌 Range All Time 💌 From
 Marketing Touches Campaign: Campaign Name Campaign: Campaign Name Campaign: Campaign Name 	To add filters, click Add.
	Preview Summary Format Show Add Chart Remove Details
	Campaign Type: Content (6 R 💙 Drop Zones
	Drop a field here to create Conditional Highlighting
	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)

5. Run Report

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



Campaign Type 🕇 💌	Campaign: Campaign Name 🕇 💽	Record Count
Content Syndication	Syndication - ReachNetwork 17Q4	1
	Subtotal	1
Direct Mail	ABM Door Opener	4
	Subtotal	4
Event - Field	Event - Field - 1802 - Saastr Executive Luncheon	1
	Event - Field - 1804 - Fogo Prospect Lunch	4
	Subtotal	5
Event - Networking	1708 - Roadshow - San Francisco	2
	1710 - Roadshow - NYC	2
	Event - Networking - 1803 - TOPO Summit Wi	1
	Subtotal	5
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