

LeanData Attribution

Opportunity Analyzer





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Overview

The Opportunity Analyzer feature for Attribution allows users to analyze their Marketing Touch information. Attribution customers can analyze their Opportunities by Opportunity ID to understand how their Marketing Touches were created.

This tool shows why certain Campaign Members or Leads and Contacts were filtered out of the Marketing Touch calculation. For Campaign Members that were filtered out, the reasoning will be explicitly listed.

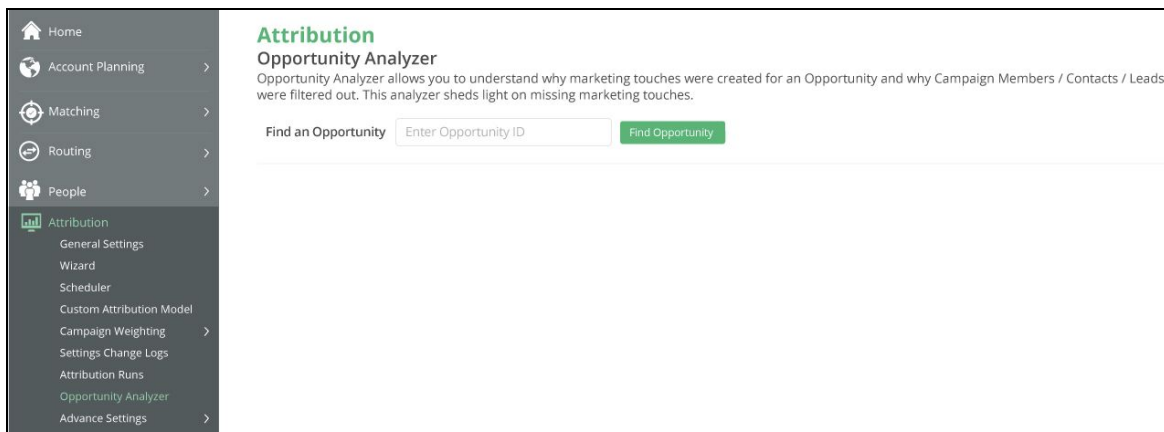
This tool is very useful for Marketing teams that suspect that they are Missing Touches on Opportunities. Another use case is understanding why particular Marketing Touches have been created as part of the Attribution model.

Use Cases

You can use the Opportunity Analyzer feature to:

- Identify an Opportunity
- View Opportunity and Account Information
- Explore Marketing Touches
- Examine Filtered Out Campaign Members & Leads and Contacts

To access this feature, navigate to the LeanData App → Attribution → Opportunity Analyzer



How to Analyze an Opportunity

Identify an Opportunity

Identify an Opportunity that you would like to analyze. Input the Opportunity ID for this opportunity on the Opportunity Analyzer page within the LeanData managed app

Attribution
Opportunity Analyzer
 Opportunity Analyzer allows you to understand why marketing touches were created for an Opportunity and why Campaign Members / Contacts / Leads were filtered out. This analyzer sheds light on missing marketing touches.

Find an Opportunity Find Opportunity

View Opportunity and Account Information

Once the page has finished loading, you can explore information related to the creation of the Marketing Touch. From this view, you can see Opportunity information (Name, Type, Amount, etc.) and Account information (Name and Type).

Opportunity Details

| | | | | | |
|--------------------|----------------------------------|--------------|------------|----------------|---------------|
| Opportunity | | | | Account | |
| Name | A Big Company: Routing, Matching | Created Date | 02/23/2019 | Name | A Big Company |
| Type | Services | Stage | Prospect | Type | Customer |
| Amount | \$45,000 | Close Date | 08/23/2019 | | |

Marketing Touches (17)
[View All](#)

Filtered Out
[Campaign Members](#) Leads and Contacts

936/953 Campaign Members Filtered [View All Campaign Members \(953\)](#)

| Name | Campaign Name | Campaign Type | Created Date | Status | Filtered |
|---------------------------|--------------------------------------|---------------|--------------|------------|-------------------------|
| <i>Terrence Sims</i> | <i>Ops Stars - Annual Conference</i> | Conference | 11/09/2018 | Registered | Details |
| <i>Margaret Henderson</i> | List | Webinar | 09/31/2018 | Registered | Details |
| <i>Jim Jones</i> | List | Webinar | 09/31/2018 | Registered | Details |
| <i>Terrence Sims</i> | <i>Ops Stars - Annual Conference</i> | Conference | 11/09/2018 | Registered | Details |
| <i>Margaret Henderson</i> | List | Webinar | 09/31/2018 | Registered | Details |
| <i>Jim Jones</i> | List | Webinar | 09/31/2018 | Registered | Details |

If the Opportunity or Account has been filtered out (which means that no Marketing Touches were created), the filtering reason will be displayed in the lower part of the Opportunity Details

section. This reason pinpoints exactly which filter in the Attribution Wizard, General Settings, and/or Custom Filter pages prevented the creation of Marketing Touches for this Opportunity / Account.

Opportunity Details

| | | | | | |
|--------------------|-----------------------------------------|--------------|-------------------|----------------|----------------------|
| Opportunity | | | | Account | |
| Name | <i>A Big Company: Routing, Matching</i> | Created Date | <i>02/23/2019</i> | Name | <i>A Big Company</i> |
| Type | <i>Services</i> | Stage | <i>Prospect</i> | Type | <i>Customer</i> |
| Amount | <i>\$45,000</i> | Close Date | <i>08/23/2019</i> | | |

This opportunity was filtered.
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Explore Marketing Touches

Click the 'View All' link to explore all the Marketing Touches (MT) that were created for this Opportunity. Once the Marketing Touches have been exposed, you will be able to sift through MT fields such as Campaign Name, Lead/Contact Name, Created Date, Touch Pre-Opp, Touch Pre-Sales, Multi-Touch Attribution, and First Touch Attribution.

| Marketing Touches (17) | | | | | | | | | |
|------------------------------------|-----------------------------------------------|--------------|---------------------------------------|--------------|---------------|-----------------|-------------------------|-------------------------|----------------------------|
| Hide All | | | | | | | | | Display Attribution Values |
| Lead/Contact Name | Campaign Name | Created Date | Opportunity Name | Created Date | Touch Pre Opp | Touch Pre Sales | Opportunity Touch Stage | Multi-Touch Attribution | First Touch Attribution |
| Terrence Sims | Ops Stars - Annual Conference | 11/09/2018 | Company Name: Prod... | 11/09/2018 | • | • | Pre-Opp | | |
| Margaret Henderson | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Jim Jones | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Terrence Sims | Ops Stars - Annual Conference | 11/09/2018 | Company Name: Prod... | 11/09/2018 | • | • | Pre-Opp | | |
| Margaret Henderson | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Jim Jones | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Jim Jones | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Margaret Henderson | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Jim Jones | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |
| Jim Jones | List | 09/31/2018 | Company Name: Prod... | 09/31/2018 | • | • | Pre-Opp | | |

If the Touch is Pre-Opp that means that this Marketing Touch occurred before the Opportunity was created.

If the Touch is Pre-Sales that means that this Marketing Touch occurred before any Sales Touch.

If you would like to further explore Attribution numbers such as Multi-Touch Attribution or First Touch Attribution, use the Display Attribution Values button. These values are calculated live when the button is clicked.

Examine Filtered Out Campaign Members & Lead and Contacts

Below the Marketing Touches section is the Filtered Out section. The records displayed in this data table have already been filtered out.

Filtered Out

[Campaign Members](#) [Leads and Contacts](#)

953 Campaign Members [View Only Filtered](#)

| Name | Campaign Name | Campaign Type | Created Date | Status | Filtered |
|------------------------------------|-----------------------------------------------|---------------|--------------|------------|-------------------------|
| Terrence Sims | Ops Stars - Annual Conference | Conference | 11/09/2018 | Registered | |
| Margaret Henderson | List | Webinar | 09/31/2018 | Registered | |
| Jim Jones | List | Webinar | 09/31/2018 | Registered | Details |
| Terrence Sims | Ops Stars - Annual Conference | Conference | 11/09/2018 | Registered | |
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| Terrence Sims | Ops Stars - Annual Conference | Conference | 11/09/2018 | Registered | |
| Margaret Henderson | List | Webinar | 09/31/2018 | Registered | |
| Jim Jones | List | Webinar | 09/31/2018 | Registered | Details |
| Jim Jones | List | Webinar | 09/31/2018 | Registered | Details |

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Within the Campaign Members tab, explore the following Campaign Member fields: Name, Campaign Name, Campaign Type, Created Date, Status. Additionally, click on the `Details` button within the Filtered column to understand the filtering reason. This reason will tell you exactly which filter in the Attribution Wizard, General Settings, and/or Custom Filter pages prevented the creation of this Marketing Touch. The Lead and Contact tab follows the same behavior and interaction as the Campaign Member tab.

Search for a specific Campaign Member or Lead / Contact using the search bar at the top of the Filtered Out section.

View All Campaign Members or All Leads / Contacts via the links below.

Note: the number of Marketing Touches is always equal to the number of Campaign Members included (Campaign Members subtracted by the Filtered Out Campaign Members)

For any additional questions, please contact your LeanData Customer Success Manager.