LeanData Attribution

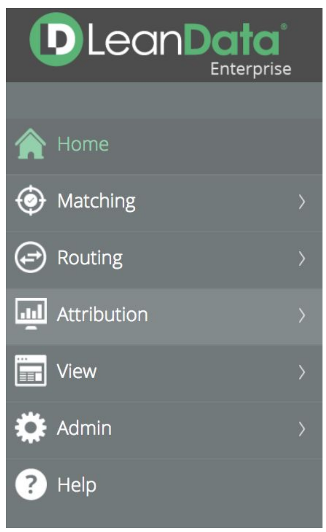
Wizard Guide

Overview

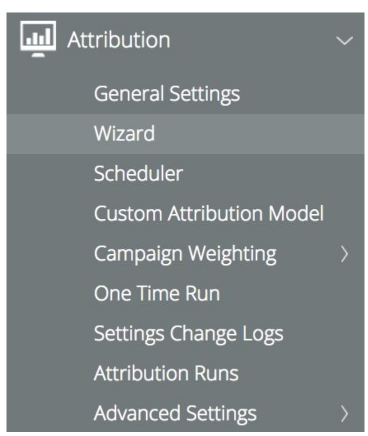
The LeanData Attribution Wizard will allow you to customize which marketing interactions are relevant in generating or influencing Opportunities. The Attribution Wizard will allow you to determine which Marketing Touches should be included or excluded when determining Campaign Attribution.

Getting Started

To get to the Attribution Wizard, navigate to the LeanData Tab and select “Attribution” from the left sidebar.

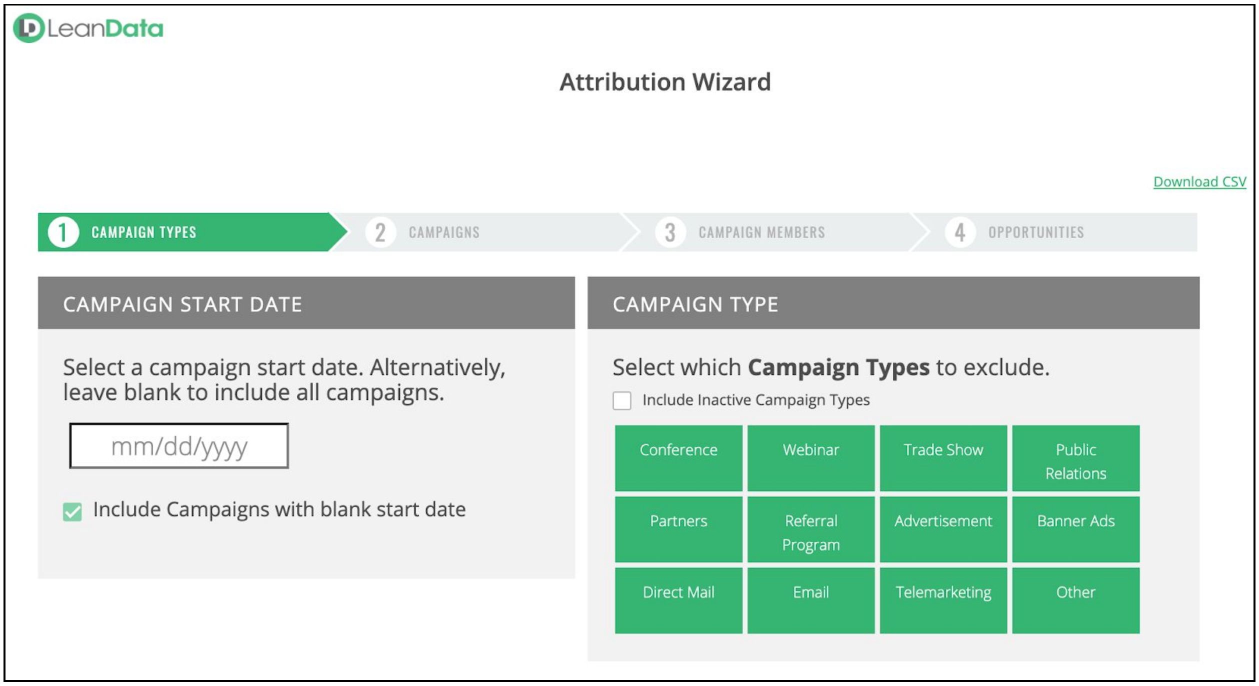


Under “Attribution,” click the “Wizard” button in the left sidebar.



After clicking “Wizard,” a new tab should open up with the Wizard Settings page where you will be able to define the data you would like to include in for Attribution.

Step 1: Campaign Criteria

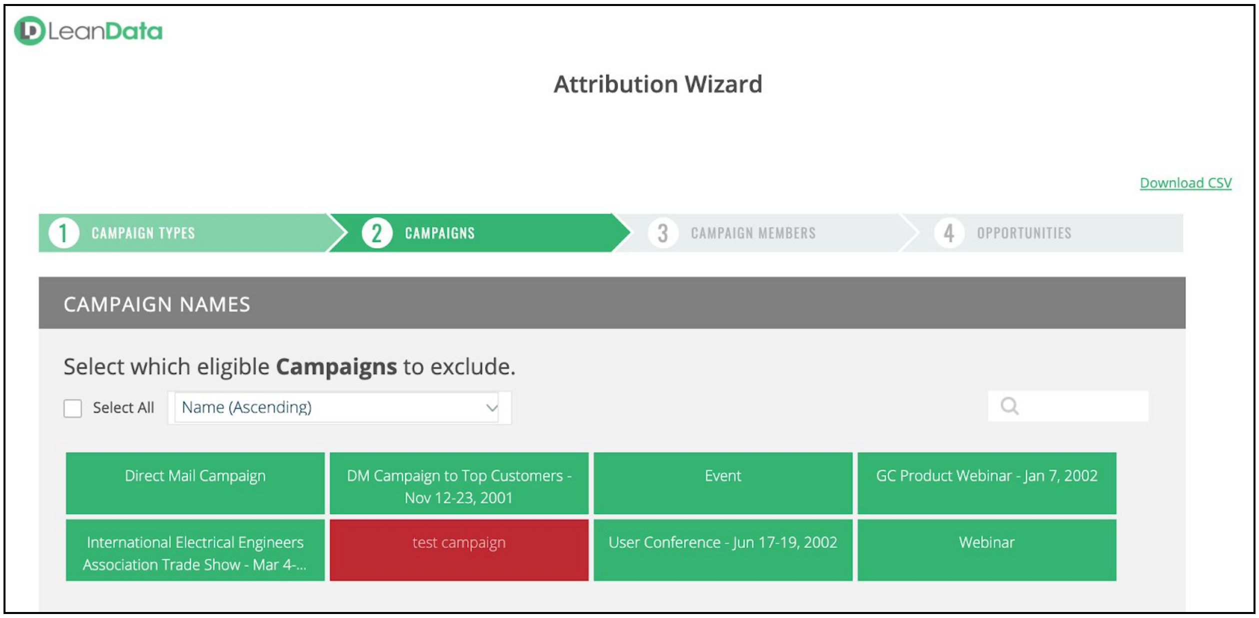


Determine which Campaign types should be included in the report. All active Campaigns Types are included by default, but you can select which Campaign Types to exclude from marketing attribution. (e.g. Test Campaign types, list purchase, etc).

Generally, it is best to leave “Campaign Start Date” blank unless there has been a significant shift in your business and you wish to completely exclude all Campaigns prior to a certain date.

Note: You will see an option to include Inactive Campaign Types. These Campaigns will not be included unless you select this option. After including these Campaign Types, you can also exclude specific Inactive Campaign Types individually.

Step 2: Eligible Campaigns

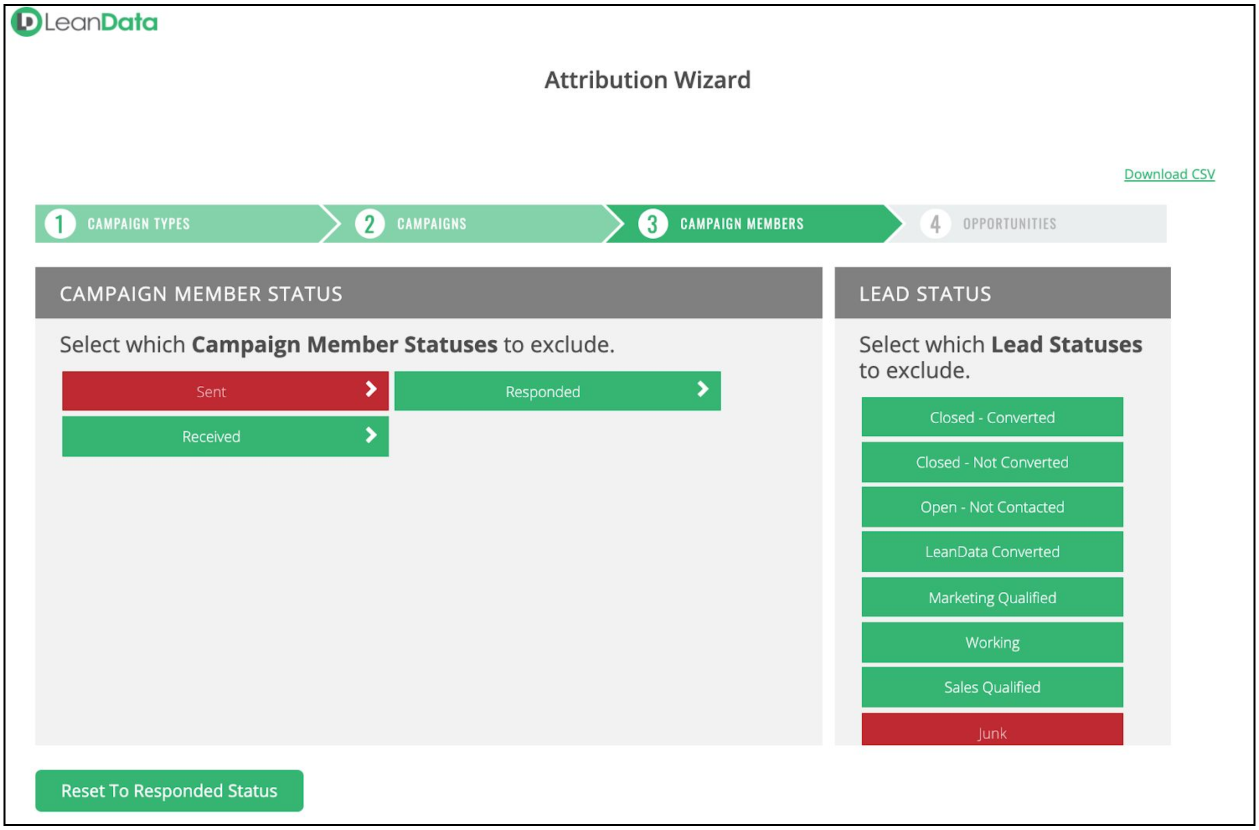


Determine specific Campaigns that should be in your data. This list is based on the Campaign types selected in the previous step. All Campaigns will be selected by default. You should deselect Campaigns that you wish to exclude from your reports. (e.g. Test Campaigns, etc).

You can use the search bar in the upper right to quickly find Campaigns.

Note: Campaigns missing a Campaign type will be excluded from this list.

Step 3: Filter by Campaign Member and Lead Status



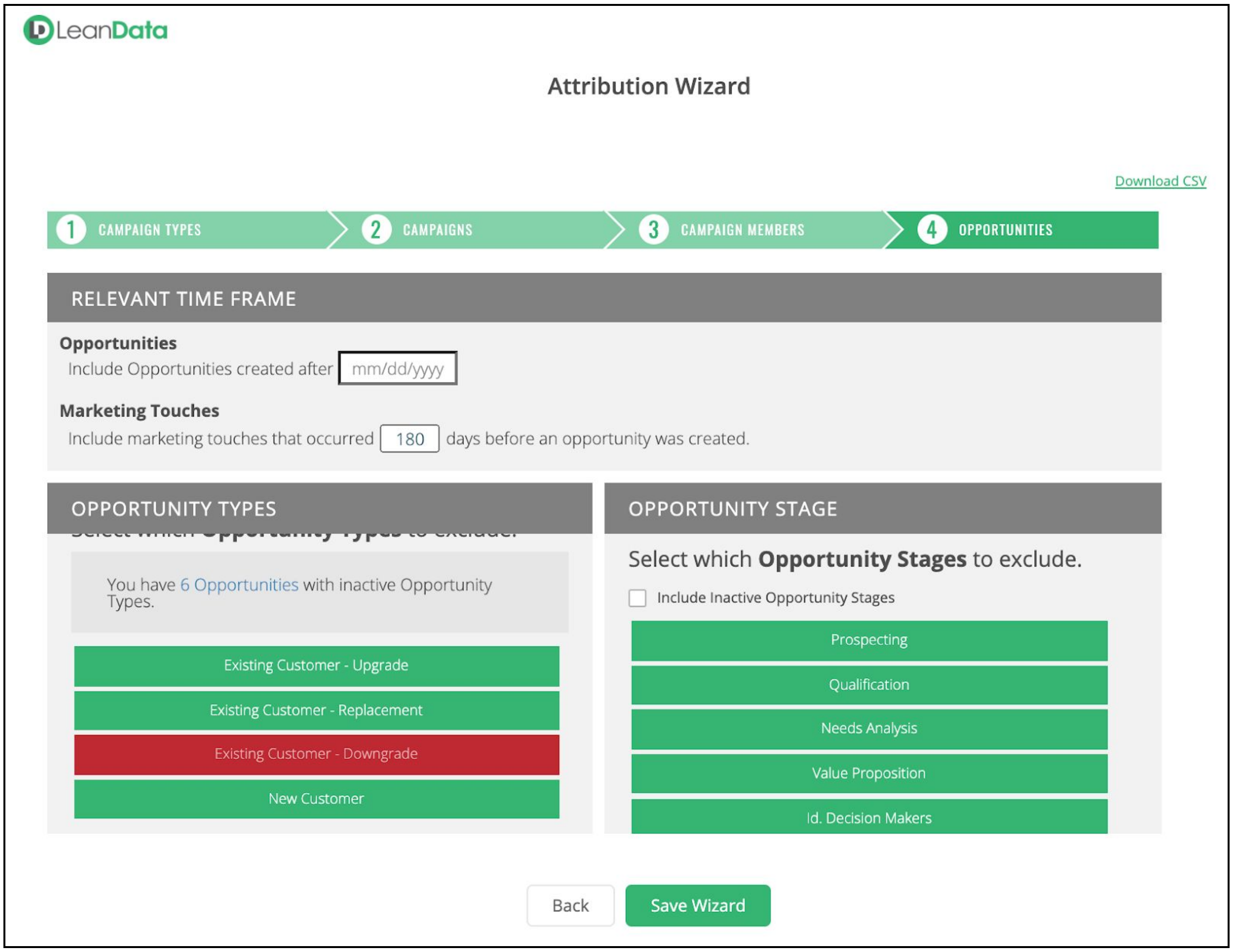
Determine which relevant Campaign Member & Lead statuses to be included in your Attribution data set. Exclude statuses which don't represent the Campaign Member taking action or that you don't want to be given marketing attribution credit (e.g. Sent, Declined, Registration Error, Opened Email etc.)

You can selectively use Campaign Member Statuses for individual Campaign Types. If you click on the white arrow by each Campaign Member status, a box containing all the Campaign Types that use that particular Status will appear, and you can select/deselect whether to include that status depending on the Campaign Type.

If you utilize the "Responded" checkbox field on your Campaign Members and would like LeanData to simply use Campaign Members that are marked with that "Responded" field instead of picking each individual status. You can click the "Reset to Responded Status" button at the bottom.

Step 4: Filter Opportunities

LeanData



Relevant Time Frame allows you to filter out Opportunities created before a certain date. This can greatly speed up your Attribution batches as it will only consider Opportunities created after the specified date.

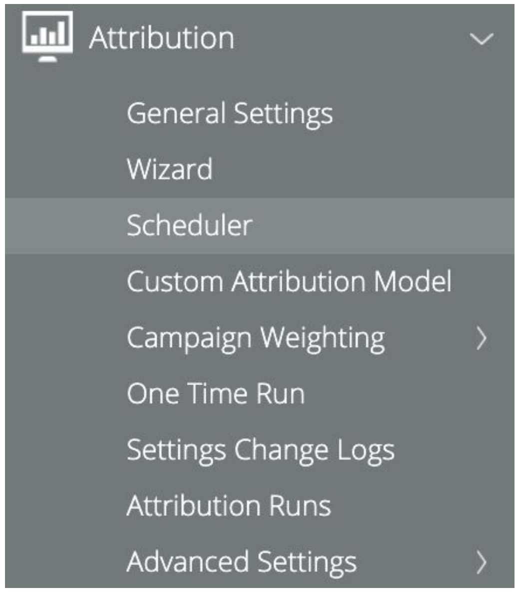
You can also determine the length of time before an Opportunity is created in which Marketing Touches can be eligible to receive Campaign attribution. By default, this time frame is set at 180 days; however, depending on the length and complexity of your organization’s sales cycles, you may choose to have a broader or narrower time frame. Only Campaign touches that occur in the relevant time window will qualify for attribution credit. For example, a Campaign interaction that happened 5 years ago is likely not influencing an Opportunity that was just created this quarter.

Exclude Opportunity types and stages that you do not wish to include in your report.

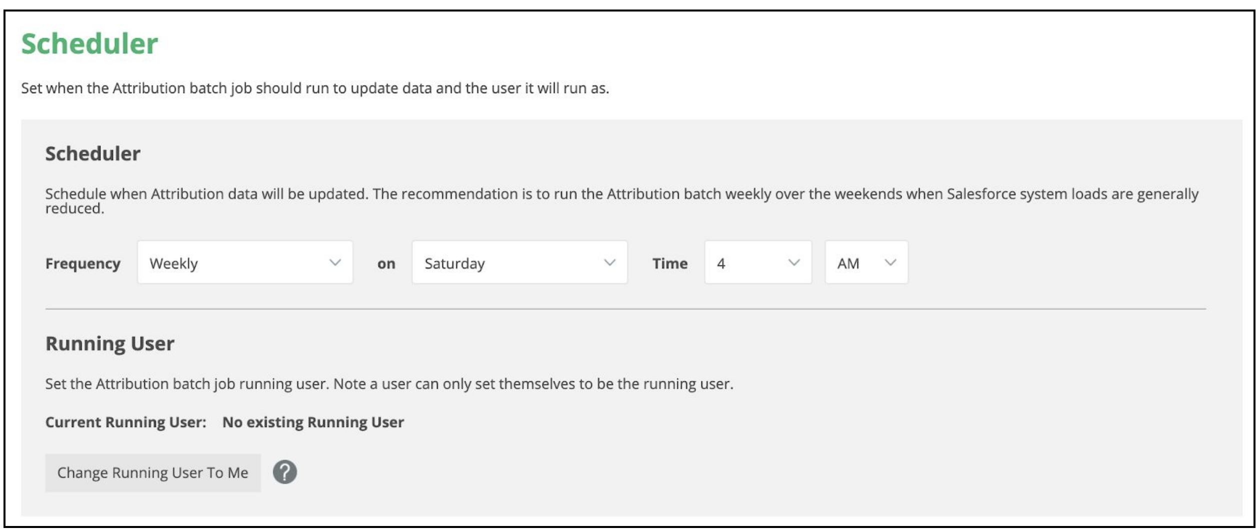
Step 5: Schedule Run

Click “Save Wizard” and go back to the LeanData tab in order to Schedule a run. This will update data for your Campaigns, Opportunities and Campaign Member touches.

Under “Attribution,” you will find a selection titled “Scheduler.”



After clicking Scheduler, set the frequency at which you would like to run LeanData Attribution. As a best practice, schedule a weekly run, ideally with enough time to review the data before the report is needed. One recommendation is to run the report Sunday evenings as this will take advantage of optimal SFDC platform performance.



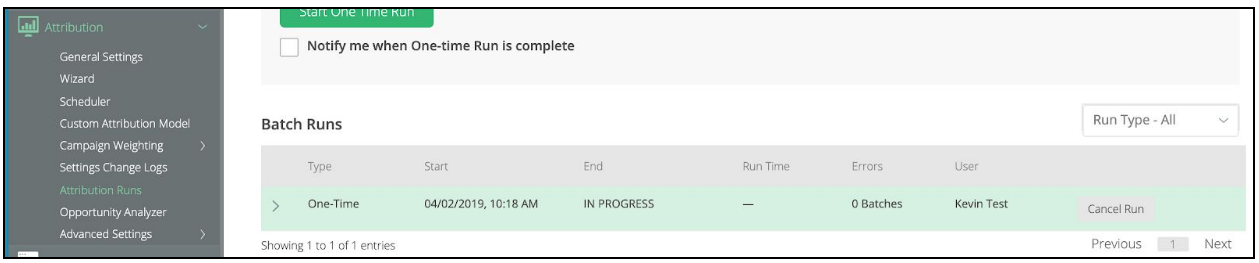
You can also change the User of record to yourself on this page by clicking the “Change Running User To Me” button. You will need to have LeanData’s Marketing Touch Permission Set to be the Running User.

Note: When LeanData's Attribution batch runs, it first deletes all existing data and then recalculates each metric utilized. While LeanData is recalculating your data, any use of the data will provide incomplete results. Please wait until it has completed running to utilize the results.

Monitoring Progress

Attribution Runs Page

The easiest way to check on the overall progress of your Attribution Run is to Navigate to the "Attribution Runs" page in LeanData.

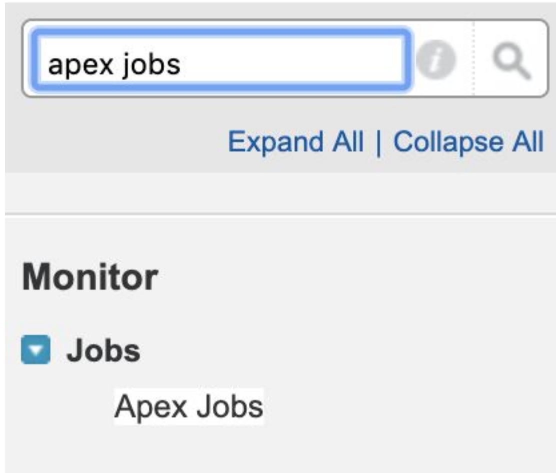


This will show you previous runs as well as any currently running batches.

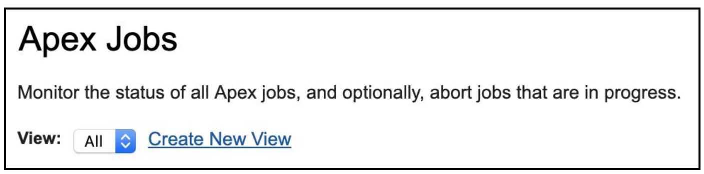
Salesforce Apex Jobs Page

Alternatively, you can check on the status of your attribution jobs by checking your Apex Jobs directly in Salesforce.

You can create a view to easily monitor the progress of your LeanData jobs. Go into "Set Up" and in the Quick Find Bar search for "Apex Jobs."

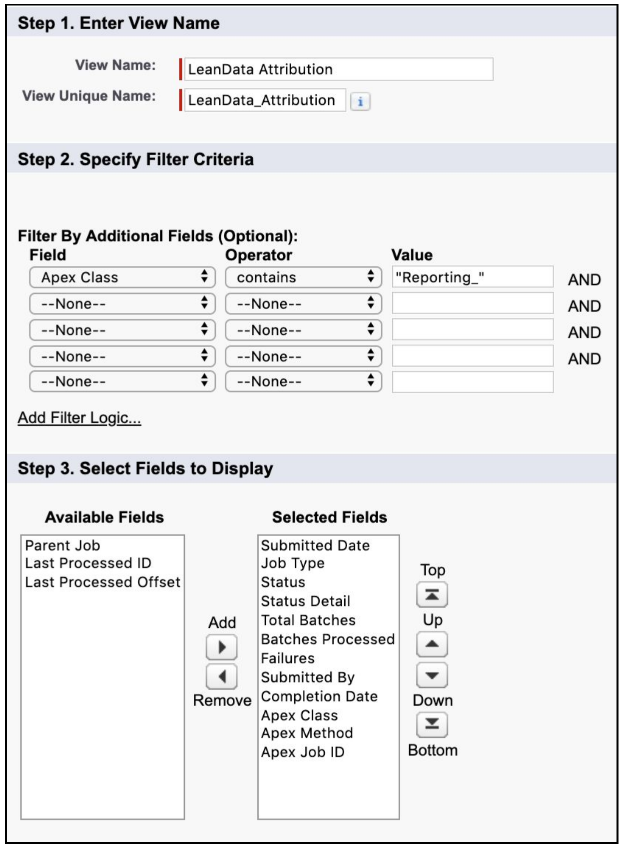


Click on “Create New View” to view the LeanData Attribution Jobs.



Enter “LeanData Attribution” in View Name. Select “Apex Class” in Field, “Contains” in Operator, and “Reporting_” in Value. Include the following fields to display:

- Submitted Date
- Job Type
- Status
- Status Detail
- Total Batches
- Failures
- Submitted BY
- Completion Date
- Apex Class
- Apex Method
- Apex Job ID



Step 1. Enter View Name

View Name: LeanData Attribution
View Unique Name: LeanData_Attribution

Step 2. Specify Filter Criteria

Filter By Additional Fields (Optional):

Field	Operator	Value	
Apex Class	contains	"Reporting_"	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Step 3. Select Fields to Display

Available Fields
Parent Job
Last Processed ID
Last Processed Offset

Add
Remove

Selected Fields
Submitted Date
Job Type
Status
Status Detail
Total Batches
Batches Processed
Failures
Submitted By
Completion Date
Apex Class
Apex Method
Apex Job ID

Top
Up
Down
Bottom