

LeanData Attribution

Buyer's Journey & Campaign View Guide



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Overview | Buyer's Journey

The LeanData Buyer's Journey timeline is a Visualforce page that lives on the opportunity layout in Salesforce. It is a timeline of all relevant sales and marketing touches, allowing you to view how marketing and sales work in conjunction to generate pipeline and close deals.

You are able to define the types of interactions you want to include using the LeanData Attribution Wizard (for marketing touches) and General Settings (for sales touches). The primary objective of this article is to explain the various features of the timeline and how to understand it.

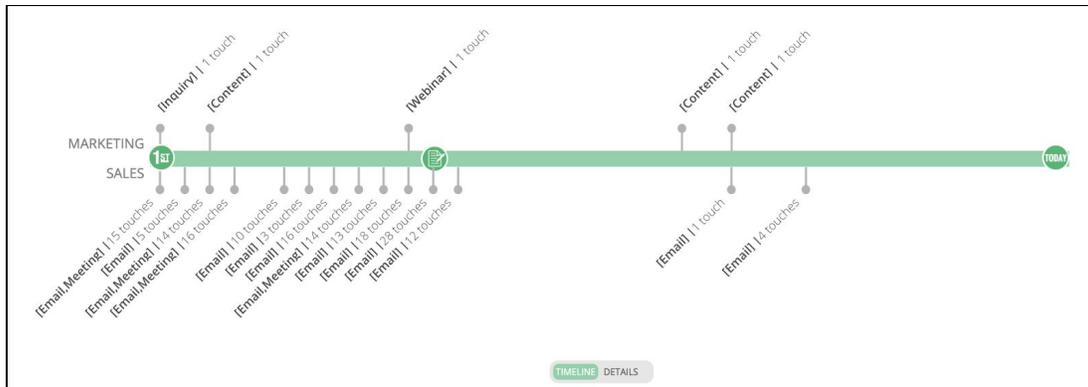
Understanding the Buyer's Journey View

The Icons

There are six primary "icons" on the Buyer's Journey.

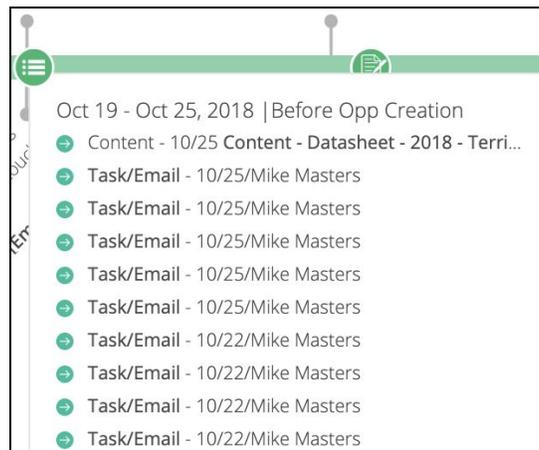
-  The **First Touch** icon marks the very first interaction on the opportunity by either marketing or sales within the relevant timeframe.
-  The **Opportunity Created** icon marks when the opportunity was created and through what source, i.e., sales or marketing.
-  The **Opportunity Stage** icon indicates a change in the opportunity stage.
-  The **Closed Won** icon, as the name suggests, indicates if an opportunity has reached a "Closed Won" stage.
-  The **Closed Lost** icon indicates that an opportunity has reached a "Closed Lost" stage.
-  The **Today** icon indicates that an opportunity is still active and has not yet reached a "Closed Won" nor a Closed Lost" stage.

The Timeline



All interactions above the timeline represent Marketing Touches, while all interactions below the timeline represent Sales Touches. The marketing touches are identified by Campaign Types associated with the interactions. The sales touches can either be tasks or events with a relevant status.

Next to the type of interaction (for example, “**Email**,” or “**Content**”) you can see the number of recorded touches. If you hover over the interactions, you can see more information on the different touches. For instance:



At the top, you see the date range in which these interactions occurred and the opportunity stage at that point in time. In this example, we’re looking at interactions between 10/25 and 10/19 before the opportunity was created. The first touch, “**Content**,” is a marketing touch, while remaining interactions are sales touches.

Note: The number of interactions are grouped by days, but the grouping is dynamic and dependent on the length of your opportunity lifecycle. If you have a longer, more complex cycle, interactions may be grouped in 5-6 days periods, as in the example above. However, if you have a shorter cycle, the interactions may be grouped within a single day.

Details

If you would like a tabular view of the timeline, you can click the **Details** button at the bottom of the Visualforce page to arrive at a downloadable view like this:

Type	Target	Account	Campaign	Attribution	Status	Activity Date
Event			-	-	-	2018-10-12
Event			-	-	-	2018-10-04
Marketing Touch			Demo Request	62500	Engaged	2018-10-03
Task			-	-	Completed	2019-02-25
Task			-	-	Completed	2019-02-25
Task			-	-	Completed	2019-02-25
Task			-	-	Completed	2019-02-25
Task			-	-	Completed	2019-02-25

Showing 1 to 8 of 121 entries

Previous 1 2 3 4 5 ... 16 Next

Download

TIMELINE DETAILS

Here you can see a list view of relevant sales tasks and events, and relevant marketing touches, including some relevant information like their attribution value and status.

Additional Options

new opp test - Buyers Journey [Analyze Opportunity](#)

Total Days: 81 Marketing Touches: 5 Sales Touches: 169 Report is current as of: 2020-09-03 01:00:15

Marketing Touch Model Unweighted

Export

Analyze Opportunity

At the top of the Buyer's Journey, near the name of the Opportunity, there will be a link that will take you to the Opportunity Analyzer page, which will allow you to understand why an opportunity may have been included or excluded from consideration.

Weighted vs Unweighted Filter

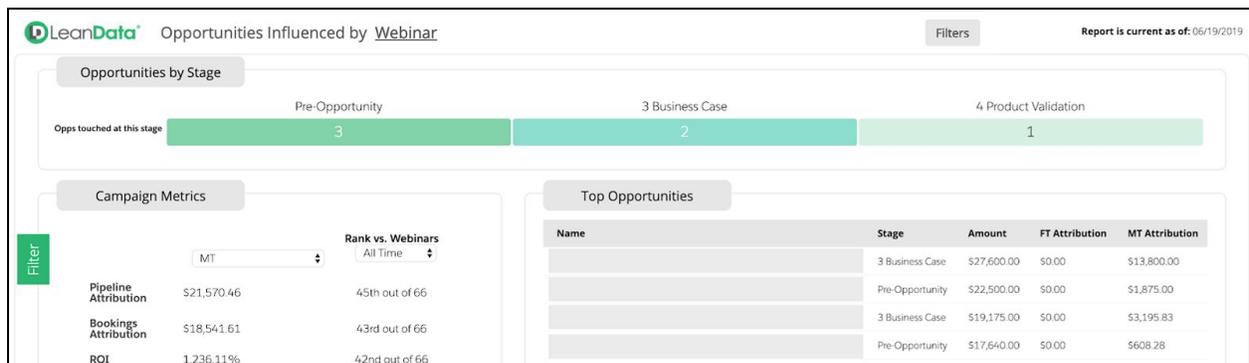
At the top right of the Buyer's Journey visual, you will be able to toggle between Weighted vs Unweighted versions of your attribution models. This will affect the attribution values displayed in the details section of this page.

Overview | Campaign View

The LeanData Campaign View is a Visualforce page that provides you a quick snapshot of how your campaigns are performing, displaying campaign-specific information that LeanData has generated such as the number of opportunities influenced, campaign ROI and other relevant metrics.

Understanding the Campaign View

At a Glance



The Campaign View Visualforce page is divided into three sections:

- **Opportunities by Stage:** The top section lists the number of opportunities this campaign has influenced, grouped by opportunity stage.
- **Campaign Metrics:** The bottom-left section highlights important metrics and allows you to view them from either First Touch (FT), Last Touch (LT), and Multi-Touch (MT) perspectives.
- **Top Opportunities:** The bottom-right section lists the top opportunities influenced by this campaign, the stage of each opportunity at the point of interaction, and the Attribution amount for each opportunity.

Note: If you click on the name of the campaign at the top, it will take you to a Salesforce report showing all the marketing touches from that campaign

Opportunities by Stage



The top visualization displays the number of opportunities the campaign touched along with the particular **stage** the opportunities were at the time of touch. The darker green stages represent the most interactions, while the lighter shades represent fewer touches.

In this example, this campaign influenced a large number of opportunities in the **“Pre-Opportunity”** stage (touches occurred before the opportunity creation date), so we could potentially conclude that this campaign is effective when it comes to generating pipeline.

Additionally, you can hover over each of the opportunity stages for further information. For example:



You can see that this campaign influenced 19 opportunities while they were in the **“3 Business Case”** stage, of which 7 have reached a **Closed Won** stage (nearly 40%). You can also see the total attribution amount represented by these opportunities.

Campaign Metrics

The Campaign Metrics section provides a quick snapshot of how your campaign is performing in terms of Pipeline Attribution, Bookings Attribution, and ROI. You can view these metrics from the perspectives of different Attribution models by selecting from the dropdown (Multi-Touch or **MT** is the default).

Campaign Metrics		
	MT	Rank vs. Contents All Time
Pipeline Attribution	\$382,393.50	11th out of 163
Bookings Attribution	\$102,164.24	24th out of 163
ROI	2,554.11%	23rd out of 163

Additionally, you can also see how this campaign performs against other campaigns of the same type based on these various metrics, by viewing the “Rank” field on the right.

Top Opportunities

The Top Opportunities section on the right lists the top 4 opportunities this campaign has influenced, along with helpful metrics such as the **Opportunity Stage** and multiple attribution values.

Top Opportunities				
Name	Stage	Amount	FT Attribution	MT Attribution
Krajcik-Bogisch - Product Sale	2 Discovery	\$132,480.00	\$0.00	\$5,520.00
Price-Considine - Product Sale	3 Business Case	\$120,000.00	\$0.00	\$1,621.62
Schmeler Group - Product Sale	4 Product Validation	\$48,600.00	\$0.00	\$2,700.00
Schiller LLC - Product Sale	Pre-Opportunity	\$30,000.00	\$0.00	\$7,500.00

Details

If you want to see a list of the specific campaign members that contributed to these metrics, click on the **Details** button at the bottom of the Visualforce page to arrive at the following table:

Campaign Member Name	Object Type	Opportunity Name	MT Attribution	FT Attribution	Campaign Member Status	Campaign Member Created	Account
Darren Rodgers	Contact	Schmeler Group - Pr...	\$2,700		Visit Booth - Meanin...	2018-05-07	Schmeler Group
James Mcdaniel	Contact	Price-Considine - Pro...	\$1,622		Visit Booth - Meanin...	2018-05-07	Price-Considine
Lisa Love	Contact with Role	Krajcik-Bogisich - Pro...	\$5,520		Visit Booth - Meanin...	2018-05-07	Krajcik-Bogisich
William Hamoton	Contact	Schiller LLC - Produc...	\$7,500		Visit Booth - Meanin...	2018-05-07	Schiller LLC

This table provides further information on the Campaign Member, Opportunities influenced and the Accounts they belong to, in addition to Object Type and Attribution Amount fields.

This allows you to look further analyze the influence of this specific campaign, but you can also view LeanData's standard campaign-level attribution reports in your Salesforce **Reports** tab for further context.

Filters

Near the top right of the Campaign View, there will be a button that will allow you to filter by Opportunity Record Type or Opportunity Type, toggle between Weighted or Unweighted versions of the Marketing Touch Models, or Include or Exclude Child Campaigns.

The screenshot shows the LeanData interface for a campaign titled "Opportunities Influenced by Webinar". At the top right, there is a "Filters" button and a timestamp "Report is current as of: 06/19/2019". Below the header, there is a "Opportunities by Stage" section with a progress bar showing "Opps touched at this stage" for Pre-Opportunity (3), 3 Business Case (2), and 4 Product Validation (1). To the left, the "Campaign Metrics" section displays a "Filter" button and a table comparing metrics to other webinars:

Metric	Value	Rank vs. Webinars (All Time)
Pipeline Attribution	\$21,570.46	45th out of 66
Bookings Attribution	\$18,541.61	43rd out of 66
ROI	1,236.11%	42nd out of 66

To the right, the "Top Opportunities" table lists the highest performing opportunities:

Name	Stage	Amount	FT Attribution	MT Attribution
	3 Business Case	\$27,600.00	\$0.00	\$13,800.00
	Pre-Opportunity	\$22,500.00	\$0.00	\$1,875.00
	3 Business Case	\$19,175.00	\$0.00	\$3,195.83
	Pre-Opportunity	\$17,640.00	\$0.00	\$608.28

The "Filters" dialog box contains the following settings:

- Opportunity Record Type: All Record Types
- Opportunity Type: All Types
- Marketing Touch Model: Weighted
- Child Campaigns: Excluded