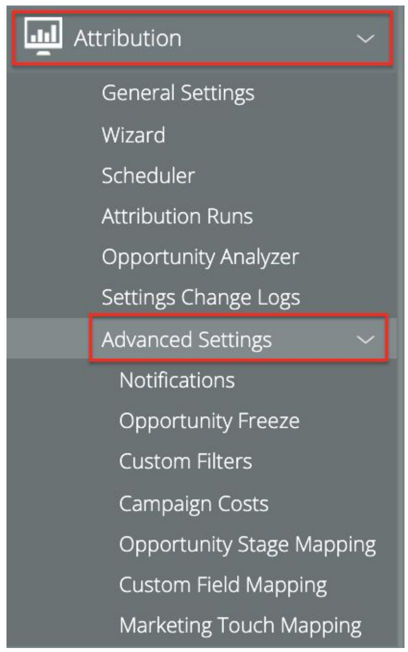
LeanData Attribution

Advanced Settings Guide

Overview

The purpose of this document is to provide LeanData's attribution customers with a straightforward guide on how to configure and use the various advanced settings available to them.

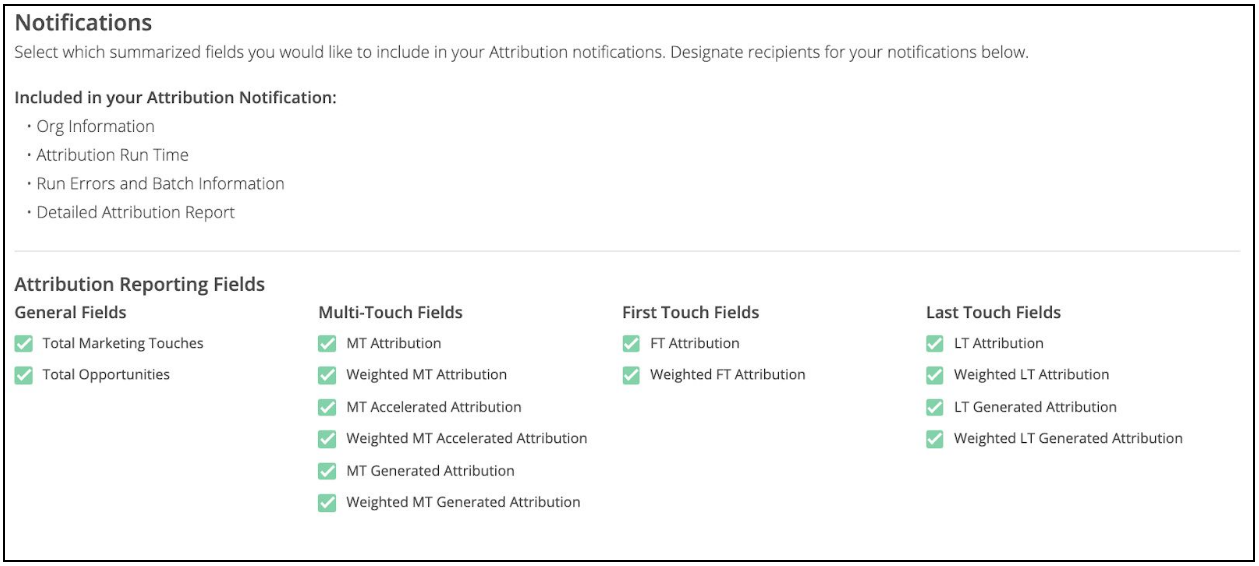


You can access the Advanced Settings by Navigating to the LeanData Dashboard and clicking through Attribution → Advanced Settings.

Attribution Notifications

Attribution Notifications provide a way to receive a quick summary of key highlights upon completion of an Attribution run.

First, select what Attribution Data you would like included in your Attribution run summary.

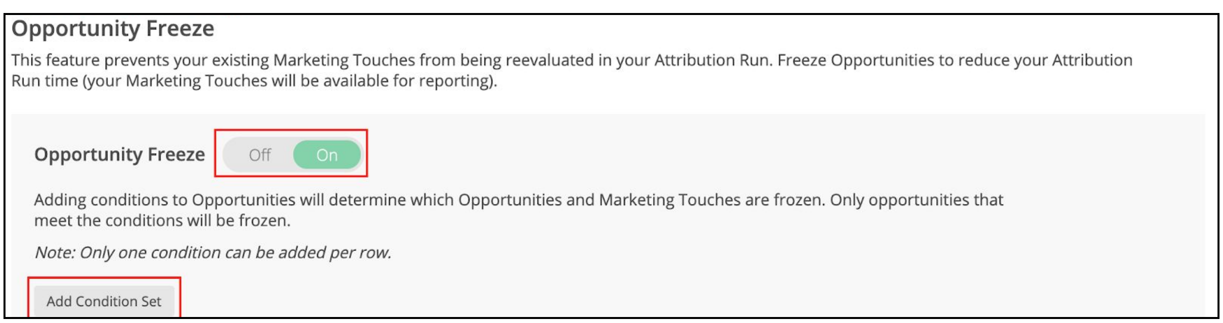


Then enter the name(s) and email address(es) for those whom you would like to send these Attribution Run summaries.

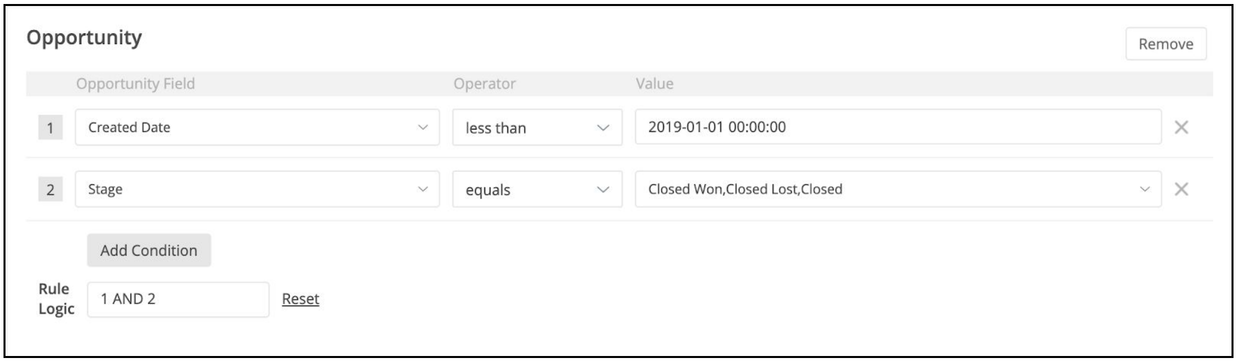
Opportunity Freeze

Opportunity Freeze is a feature that allows you to define a set of Opportunity criteria against which LeanData Attribution will not recalculate in it's subsequent batches. Existing Marketing Touches from these Opportunities from earlier runs will remain in your system, but will not be updated in subsequent batches.

1. Toggle on the Opportunity Freeze Setting



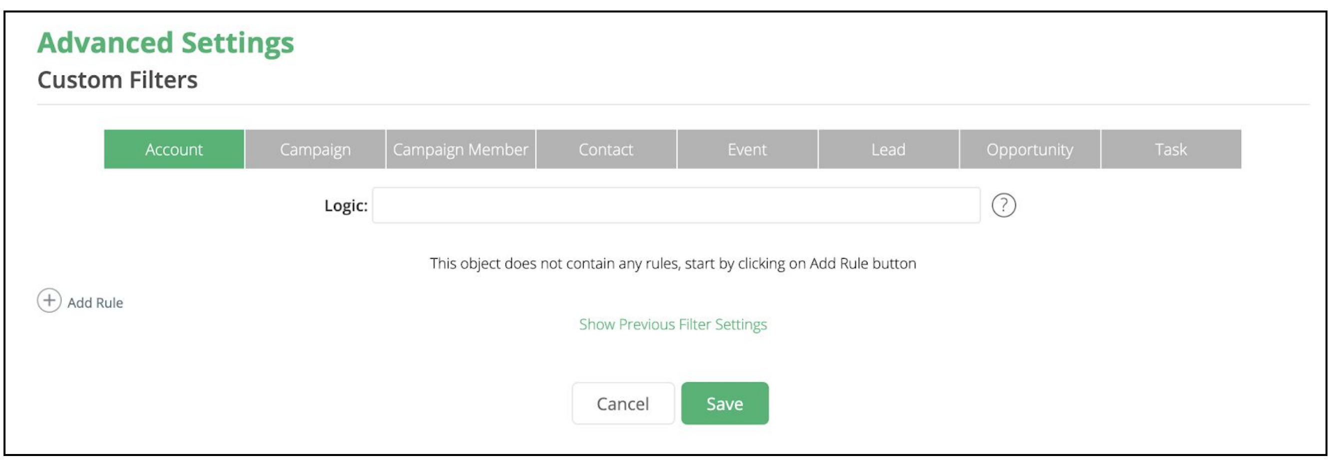
2. Click Add Condition Set
3. Add the conditions for the Opportunities you would like to freeze. You may combine multiple conditions using Rule Logic. (i.e. 1 AND (2 OR 3))



4. Hit Save Changes in the upper right when you are finished setting your conditions.
5. Starting from your next Attribution batch, LeanData will not iterate on Marketing Touch data from Opportunities that meet these conditions.

Custom Filters

Custom Filters provide an additional way to filter your attribution data if the standard filtering criteria performed in the Attribution Set-Up Wizard is insufficient. These custom filters will not override the filters you set in Attribution Wizard, but will be applied in addition to the filters set up in the Wizard.



You can filter by the following objects: Account, Campaign, Campaign Member, Contact, Event, Lead, Opportunity, and Task. Click on the object you want to filter by and click “add rule” to begin defining your filter criteria.

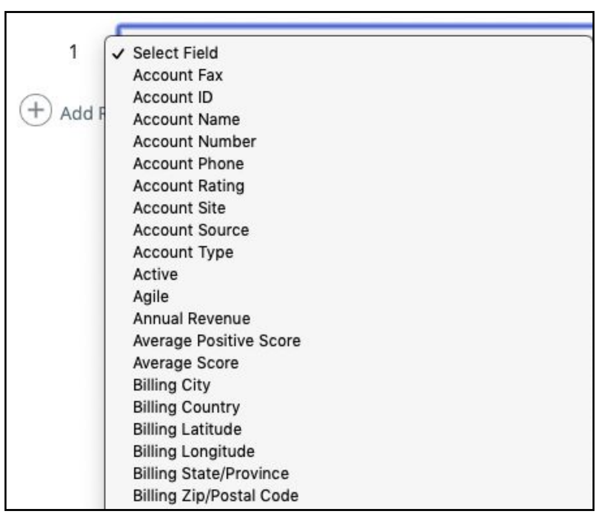
Note: These are filters for INCLUSION. Records that meet the criteria you set will be included in the next Attribution run.

Below are a few examples of Custom filters:

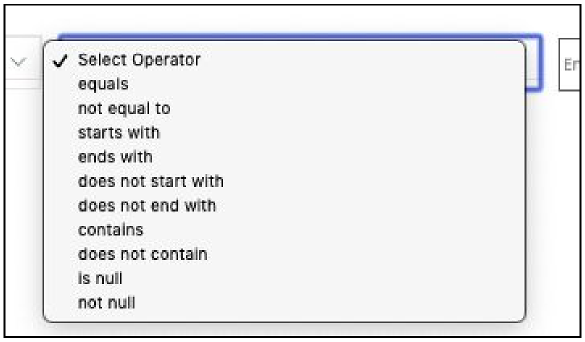
- **Account**: Only include Non Partner and Non Competitor Accounts.
- **Campaign**: Only Include Campaigns whose names do not contain the words "test" or "mock."
- **Contact**: Only include contacts that do not contain your company email domain.
- **Lead**: Only include leads from the geographies where your company does business.
- **Opportunity**: Only include Opportunities above a certain deal size.
- **Task**: Only include Tasks that are not automated via Sales Cadence tools like Salesloft or Outreach, as you might not want to include automated activity as a relevant sales interaction.

To configure the filters, Select the Object you wish to filter by, and click "add rule" button at the bottom.

A drop-down will open up on the left if you click the "Select Field" box. Here you will be able to select from the various fields on the object you selected.



Next, you will click "Select Operator" to define what operation you would like to use in this criteria. Keep in mind that these criteria will define which records to ***include*** as a part of your Attribution dataset



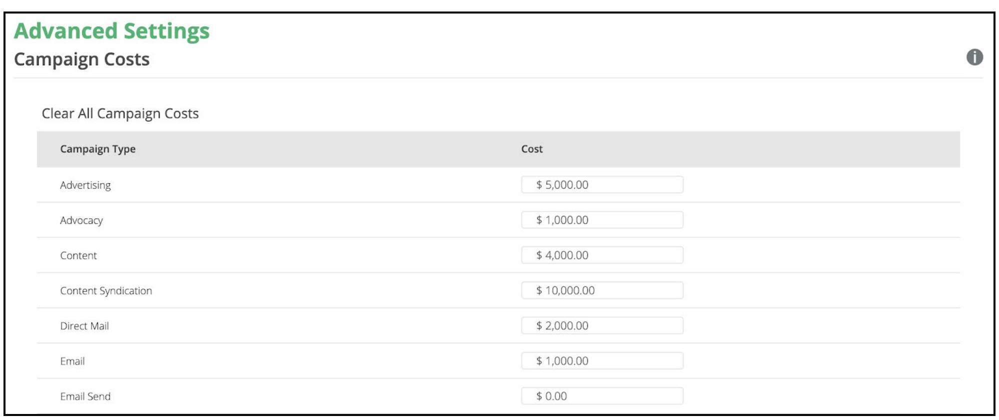
The final step is to enter the filter operand, which will define the field value for which the operator will apply. For example, if you don't want to include campaigns with the word "test", you may want to input the word "test" in the final box, after selecting "does not contain" as the operator. If using date filters, this field will accept date literals such as TODAY or YESTERDAY.

After making your changes, make sure to click the "Save" button.

You may wish to combine multiple conditions, which you may do with the Logic box at the top of the page, using a combination of AND / OR statements and parentheses.

Campaign Cost

If you want to calculate metrics such as "cost per touch," (campaign cost ÷ number of relevant marketing touches) or want to have a detailed look into ROI but have not recorded campaign costs historically, it makes sense to plug in average cost values for your campaigns using this setting.

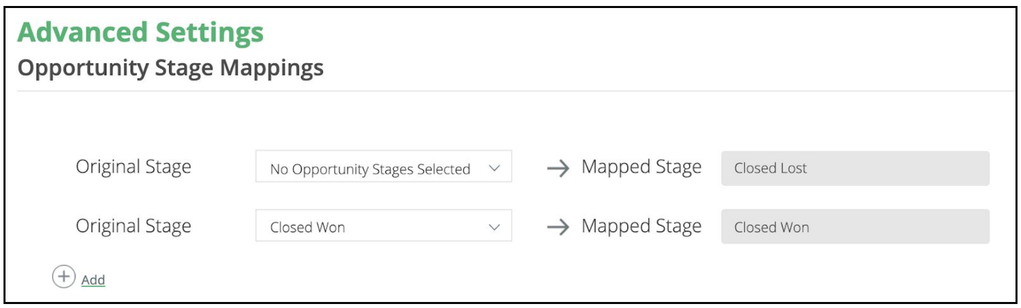


Note: this setting is only used as a fallback. This value will only be used in an instance where a Campaign does not have a value in the “Actual Cost” field in Salesforce. LeanData will use Actual Cost whenever it is available.

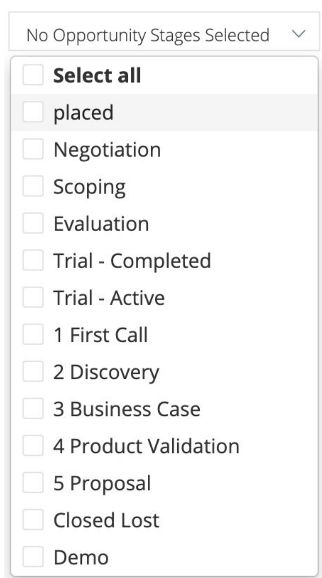
Opportunity Stage Mappings

If you have historical stages that you need to align with current, updated stages, you may want to map your old values with the new values in this setting. This way, when you run Attribution, LeanData will keep consistent and comparable data by using your current Opportunity Stages.

To begin, first click the “Add” button at the bottom of the page.



Next, select the opportunity stage you want to map from the drop-down. Note: these are all stages LeanData pulls in from your Salesforce instance.



After selecting the stage(s) you want to be mapped, input the stage name to which you wish to map the selected stages in the box to the right.

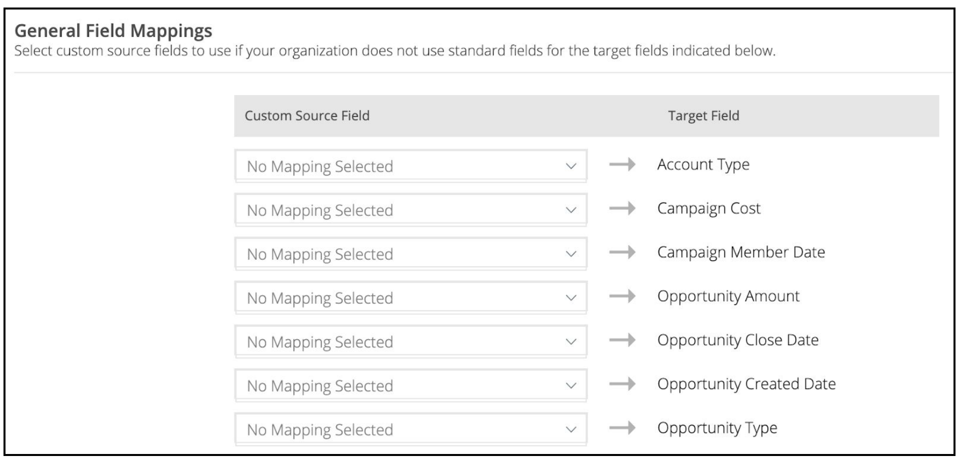
Again, make sure to hit the “Save” button at the bottom to ensure your changes are being recorded. You can repeat this process for any other stages you wish to map to a different stage name.

Custom Field Mappings

There are two mapping options available in this setting: “General” and “Campaign Member.”

General Field Mappings

On the right, under “Target Field,” we have a list of standard Salesforce fields used in Attribution that are commonly mapped to custom versions of those fields. If you use custom versions of these fields in your organization that differ from these standard Salesforce fields, you can choose from the “Custom Source Field” selection on the left to make that change, and LeanData will utilize the Custom Source field you specify instead of the Standard field.



A few common mappings are:

- “Annual Contract Value (ACV)” or “Total Contract Value (TCV)” → Opportunity Amount
- “Opportunity Engagement Date” → Opportunity Created Date

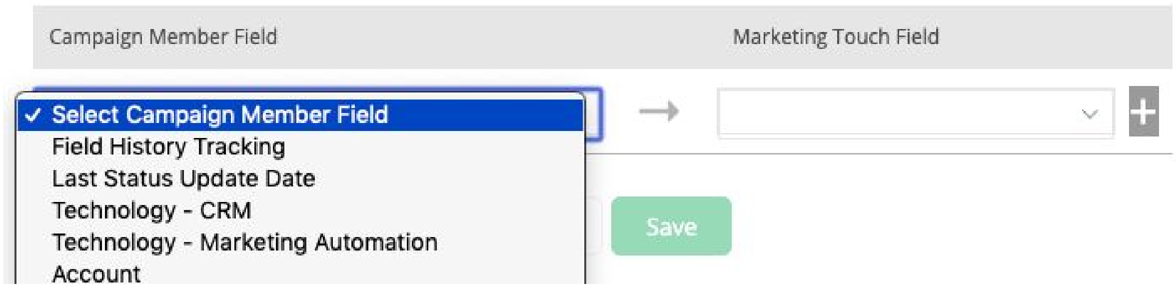
Back-Dating Campaign Member Dates

For certain Campaigns, you may upload campaign members at a later date after the campaign has already happened. Since this does not happen for all your campaigns, you don’t want to create a general mapping for all of your campaigns.

If you would like to use the Campaign Start Date instead of the Campaign Member Created Date on specific campaigns only, you can check the “Back-Dated” field on the Campaigns you would like to back-date, and LeanData will use the Campaign Start Date for those Campaigns only.

Campaign Member Field Mappings

Use this option to pull in campaign member fields onto corresponding fields on the marketing touch object.



You can select the specific campaign member field using the selection tool on the left. Once you've selected a field, you can select the corresponding field on the Marketing Touch object to map to.

Note: You will first have to ***create*** the field you wish to use on the Marketing Touch object. You will also have to create an identical field on the Temporary Marketing Touch object. Please reach out to your Customer Success Manager for assistance.

A few common use-cases are:

- "UTM Tracking Code"
- "Lead Funnel Status Tracking"

Marketing Touch Mapping

LeanData's Marketing Touch object includes certain default fields to help you report on your Attribution data. If you need to include your own custom data for reporting purposes, you can utilize Marketing Touch Mappings to add your own Campaign Member, Lead, or Contact Fields onto corresponding Marketing Touch fields.

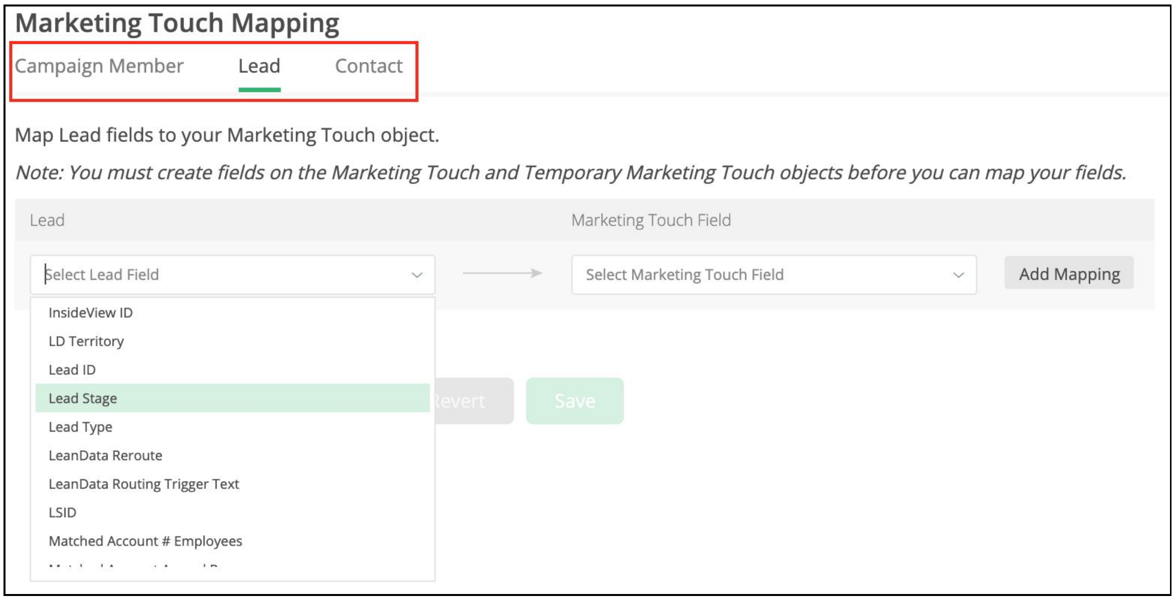
Creating Marketing Touch Fields

Before you can set up your mappings between your custom Campaign Member, Lead, or Contact fields to Marketing Touch Fields, you must first create fields on the Marketing Touch and Temporary Marketing Touch objects to receive those custom field values.

Creating Marketing Touch Mappings

Once you have created the fields on the Marketing Touch and Temporary Marketing Touch objects to receive values from your custom Campaign Member, Lead, and Contact fields, you can now set up your mappings.

Select which object you would like to pull your custom field from the tabs at the top.



Select the fields you want to map onto the Marketing Touch object from the left dropdown, and select the corresponding Marketing Touch field from the right dropdown. You may create as many different mappings as you wish. Hit Save when you have finished.

Your next Attribution run will populate your custom mapped fields onto the Marketing Touch object.