LeanData Attribution

Custom Weighting Guide

![LeanData logo]

Overview

Not all touches are created equally! You may come across instances where you have relevant marketing touches, but you would like them to have differing impacts on marketing attribution value. For example, an in-person dinner product deep dive touch is probably a little more meaningful than attending a webinar.

LeanData Attribution allows weighting of campaign type and campaign member statuses (by campaign type) across a 1 - 6 scale. By default, weighting is disabled and attribution is distributed equally across all relevant marketing touches.

Weighting is a value that is relative to other weighting values. In other words, if all campaign types are weighted 1, it would have the same effect as if all campaign types are weighted 6. We intentionally don't have a middle in order to force a relative ranking.

Example

The following illustrates a simple example of weighting in action:
- Opportunity A
  - Amount: $1,000
- Campaigns
  - Campaign X:
    - Type: Webinar
    - 1 relevant marketing touch on Opportunity A
    - Campaign Member Status: attended
  - Campaign Y:
    - Type: Dinner Demo
    - 1 relevant marketing touch on Opportunity A
    - Campaign Member Status: attended
  - Campaign Z:
    - Type: Tradeshow
    - 1 relevant marketing touch on Opportunity A
    - Campaign Member Status: attended

How much credit is applied under the weighted and non-weighted models?
- Non-Weighted Attribution
  - Campaign X campaign member: $500 ($1,000 / 2)
  - Campaign Y campaign member: $500 ($1,000 / 2)
- Weighted Attribution
  - Weights
    - Webinar: 2
    - Dinner Demo: 5
    - Tradeshow: 3
  - Attribution
    - Campaign X campaign member: $200 [$1,000 * (2 / (2 + 5 + 3))]
    - Campaign Y campaign member: $500 [$1,000 * (6 / (2 + 5 + 3))]
    - Campaign Z campaign member: $300 [$1,000 * (3 / (2 +5 + 3))]

Best Practices

How to Weight

When using a weighted model, you have the option to weight by either campaign type or campaign member status. We recommend if you are to use a weighted model, consider weighting based off of the member status rather than campaign type. There are often member statuses that represent customer interactions that are much more impactful than others.

> *Example: If you weight off of a campaign type and one of your campaign types is an Event, two people that responded to the event would be weighted the same with campaign type weighting. However, if you weight by campaign member status, someone who books a meeting at the event would be weighted higher than someone who just RSVP's for the event. Your member statuses are still split by campaign type when you weight them so you can still weight a booked meeting at an event differently than you would a booked meeting partner conference for example.*
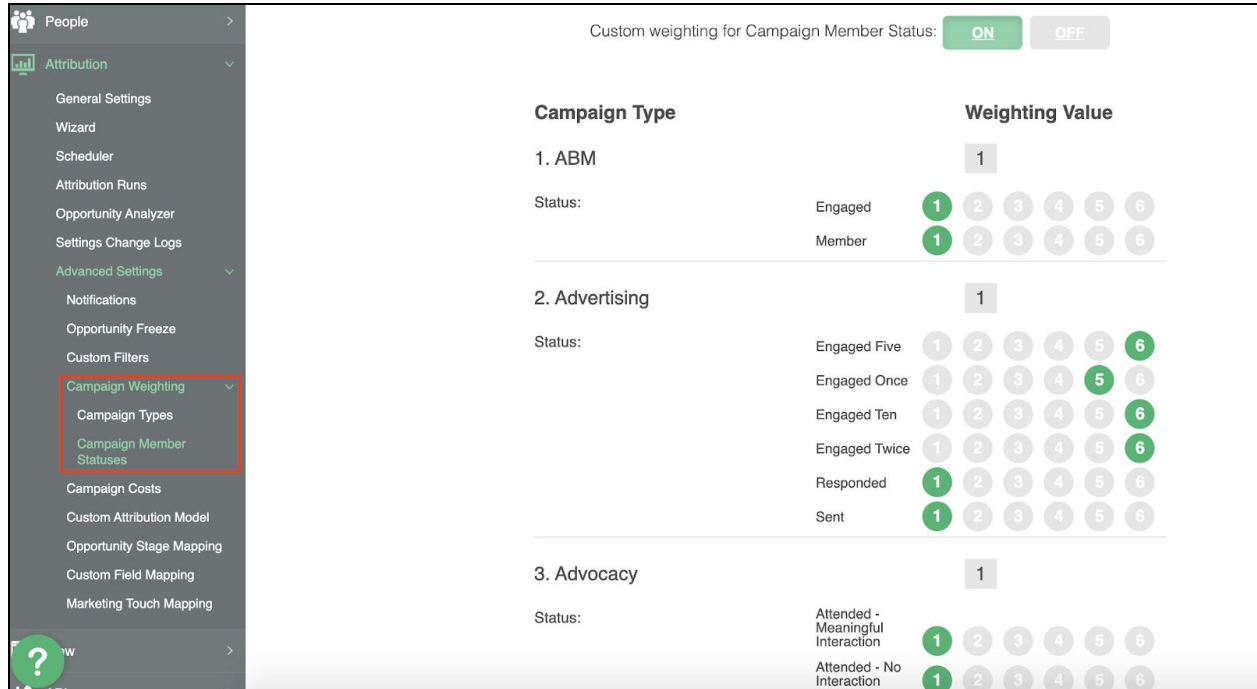
Weighted vs Non-Weighted Reports

Weighted and non-weighted reports together. Each of our metric fields that we use to calculate attribution (for example MT Attribution, MT Generated Attribution, MT Accelerated Attribution) have corresponding weighted fields. So instead of using MT Attribution Amount you would use Weighted MT Attribution Amount. Because of this, you are able to run your standard un-weighted models concurrently with your weighted models.

> *Example: If you have a dashboard that houses all of your attribution reports, you can clone that dashboard and it's reports and use the weighted values instead of the normal values in the cloned versions, you can use your unweighted and weighted dashboards together.*

Summary

This guide has provided an overview of adding weighting to your touches and how best to do it. The guide includes a breakdown of the distribution of money on your touches and how weighting can affect it. There are also best practices to help you get the most out of weighting and reporting on weighting vs non-weighting.