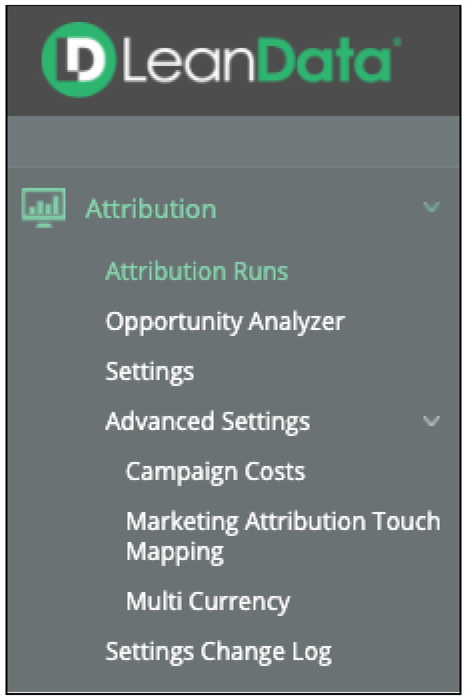
LeanData Attribution

Settings Guide 3.0

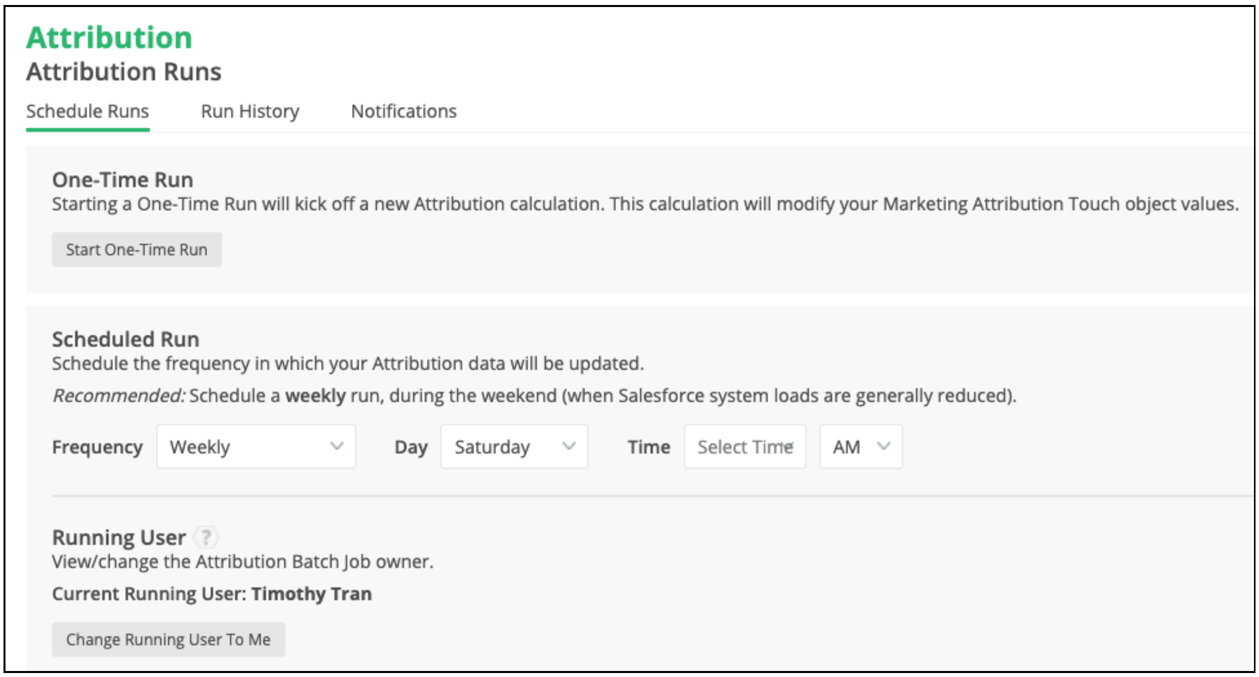
Overview

The purpose of this document is to provide LeanData's attribution customers with a guide on configuring and using the various settings available to them. Attribution 3.0 is part of the LeanData Analytics App. You will need to download the LeanData Analytics App from the App Exchange before using this guide. To access Attribution, you will need to access the LeanData Analytics Tab instead of the standard LeanData App.



Attribution Runs

The Attribution runs section gives you visibility and control over when your Attribution Runs process as well as details as to how they are performing. Each time an attribution run takes place, LeanData is deleting the entire attribution data set and recalculating everything all over again (unless Opportunity Freeze is enabled).



Schedule Runs

The Schedule Runs screen gives you the tools needed to create your runs. There are settings for One-Time Runs, Scheduled Runs and the Running User.

One-Time Run

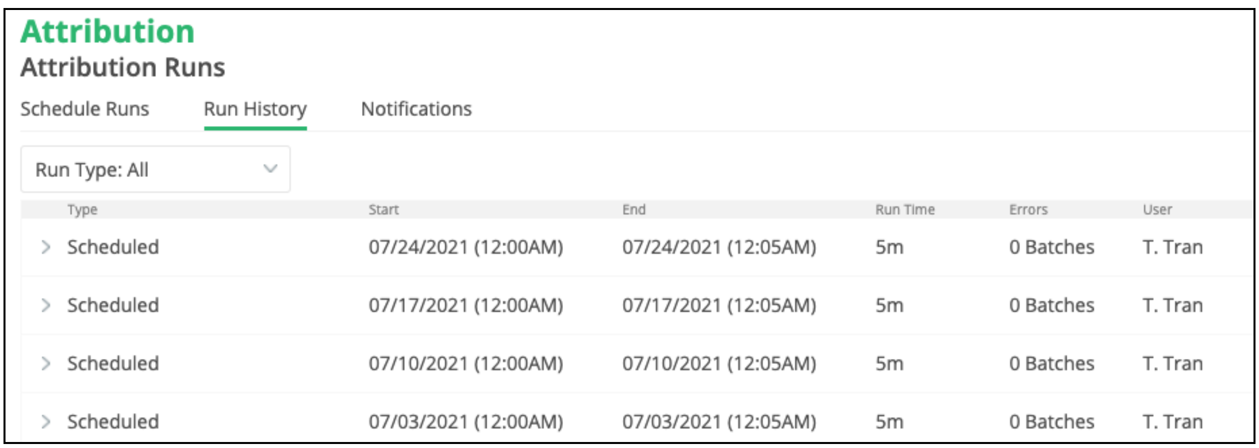
Starting a one-time run kicks off your attribution run on demand. This is useful when you would like to run attribution but do not want to wait for the next scheduled run. A One-Time run is best used when you change your attribution settings and would like to refresh the data to your new settings. In this case, you can launch the one-time run immediately to see how your changes affected the run, as opposed to waiting for the next scheduled run.

Scheduled Run
These are runs that kick off on a schedule you set. If your runs are under 8 hours long, you can typically have a daily run starting at 11 PM or midnight so that they run overnight. If you have a busier APEX queue, (lots of tools running in your SFDC) and your runs are longer, a better practice may be to run Attribution over the weekend when Salesforce activity is not as frequent.

Running User
This is the user of record on the Attribution runs. This user will need full access to all SFDC objects related to Attribution (Lead, Contact, Campaign, Campaign Member, Opportunity, Account, Task, and Event), as well as the permission set titled LeanData Analytics Read/Write. When saving your scheduled runs, the user you are logged in as, when saving will automatically be set as the running user. You can also login as a user and click “Change Running User To Me” in order to change it to that user.

Run History

Run history shows details on how your Attribution Runs are performing. If there are any errors on your runs, you can hover over the row with errors and click view errors on the right side to get the details of those errors.



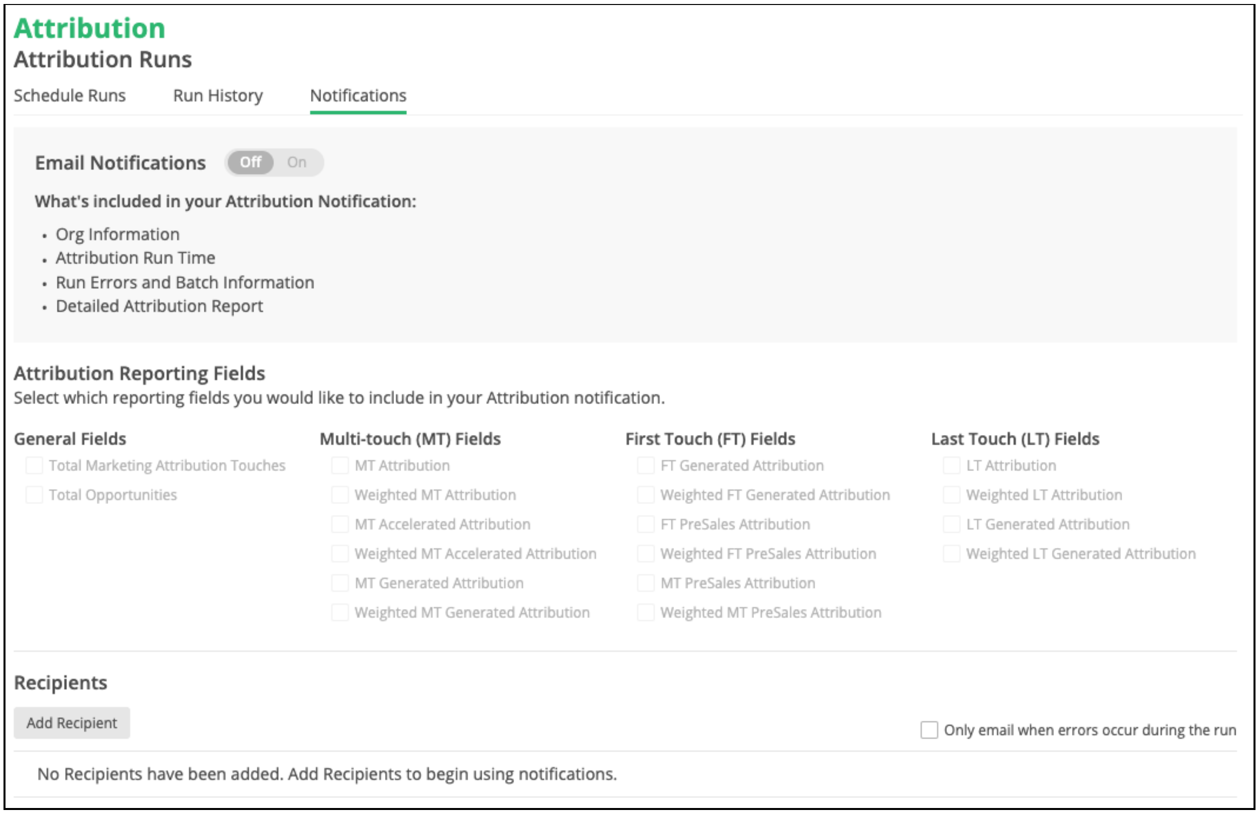
Attribution
Attribution Runs
Schedule Runs | Run History | Notifications
Run Type: All

Type	Start	End	Run Time	Errors	User
Scheduled	07/24/2021 (12:00AM)	07/24/2021 (12:05AM)	5m	0 Batches	T. Tran
Scheduled	07/17/2021 (12:00AM)	07/17/2021 (12:05AM)	5m	0 Batches	T. Tran
Scheduled	07/10/2021 (12:00AM)	07/10/2021 (12:05AM)	5m	0 Batches	T. Tran
Scheduled	07/03/2021 (12:00AM)	07/03/2021 (12:05AM)	5m	0 Batches	T. Tran

Notifications

The Notifications screen gives you tools to set up notifications about your runs including:

- Org Information
- Attribution Run Time
- Run Errors and Batch Information
- Detailed Attribution Reports



Email Notifications

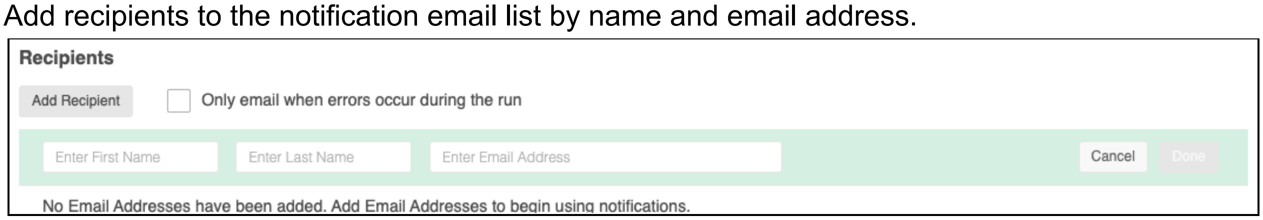
Email notifications are used to update you on the progress of your Attribution runs without having to access Attribution and manually check on them. Best practice is to, at a minimum, set the notifications up for the Admin of the attribution tool and check the box saying “only email when errors occur during the run” so that the administrator can be aware of issues with the run.

Attribution Reporting Fields

You can select with attribution reporting fields to include in the notifications. The value of the fields will be included in the run as well as the delta for that field between last run and the current run.

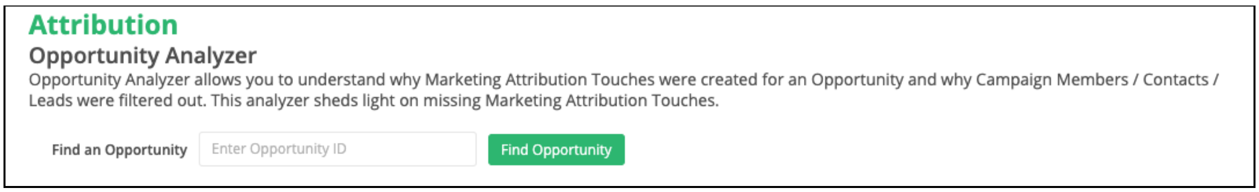
Recipients

Add recipients to the notification email list by name and email address.

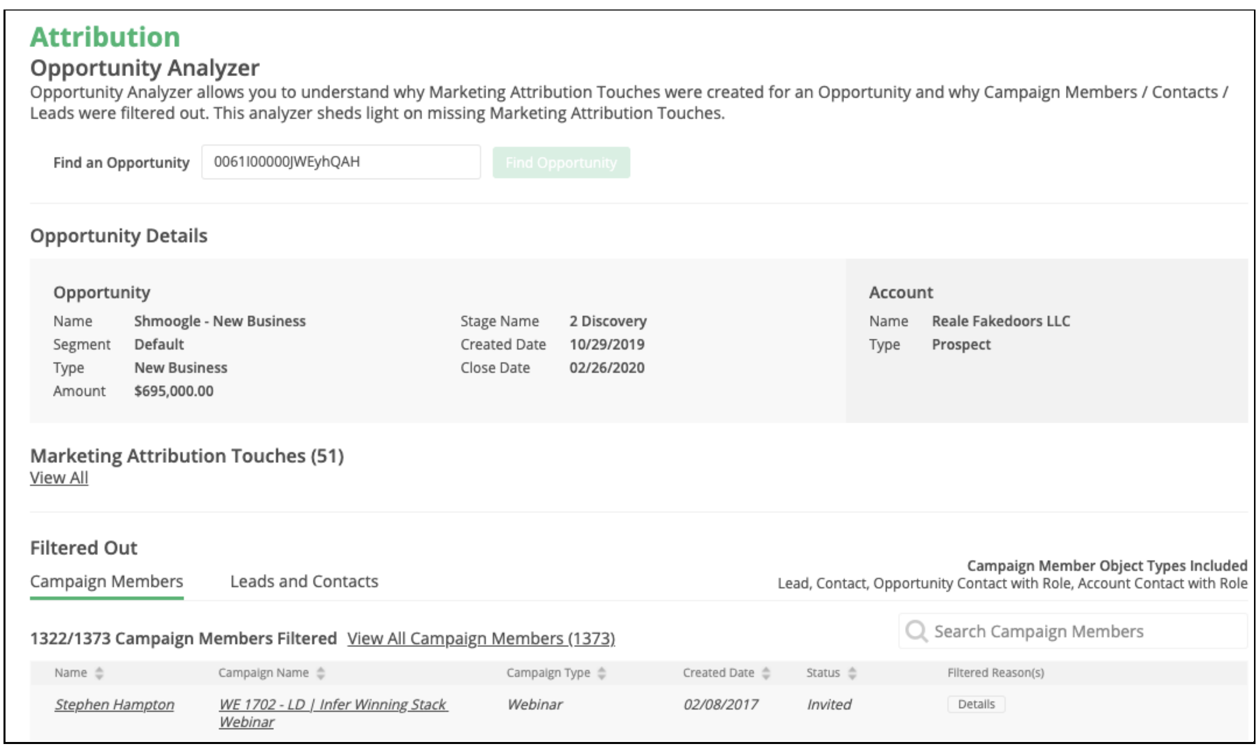


Opportunity Analyzer

This is the go-to troubleshooting tool for Attribution and also known as “Audit Logs of Attribution” for all of you LeanData Routing users out there. Keep in mind that this tool is a live query of the attribution settings so if there has been changes to the data since your last Attribution run, this tool will not be 100% indicative of what’s currently in the attribution data set.



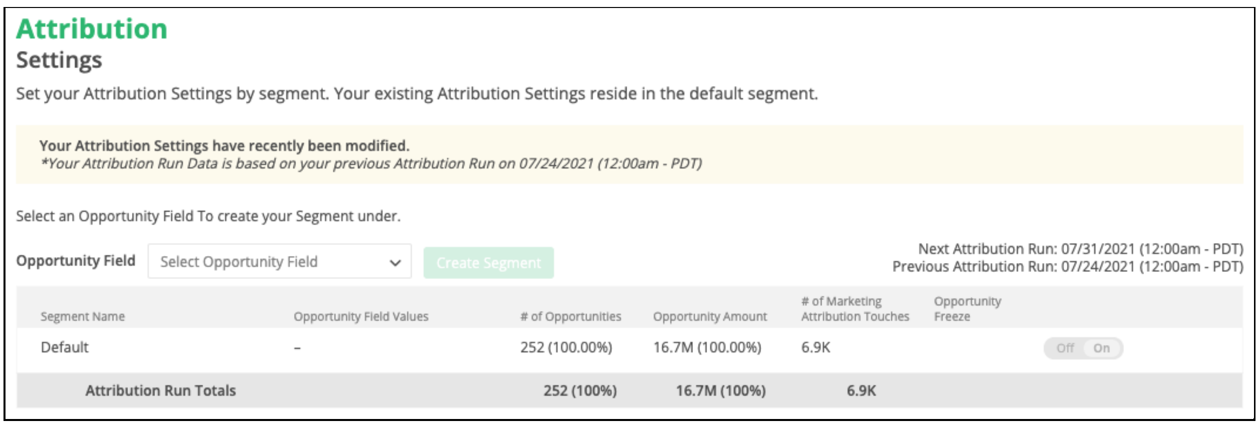
To use, enter an opportunity ID in the search bar and click find opportunity. Under “Marketing Attribution Touches” you can click ‘View All’ to see all of the campaign memberships that are counted as marketing attribution touches under the current settings. Under “Filtered Out” you can find the campaign members that are not considered marketing attribution touches. By clicking Details in each row, you can see why that campaign member would be filtered out from the model. Both sections described above also have search bars in order to search for specific individuals.



Settings

This is the main landing page for the settings section and is also where you can set up 'Multi-Segment Attribution'. To do so, reach out to your LeanData CSM to enable the feature.

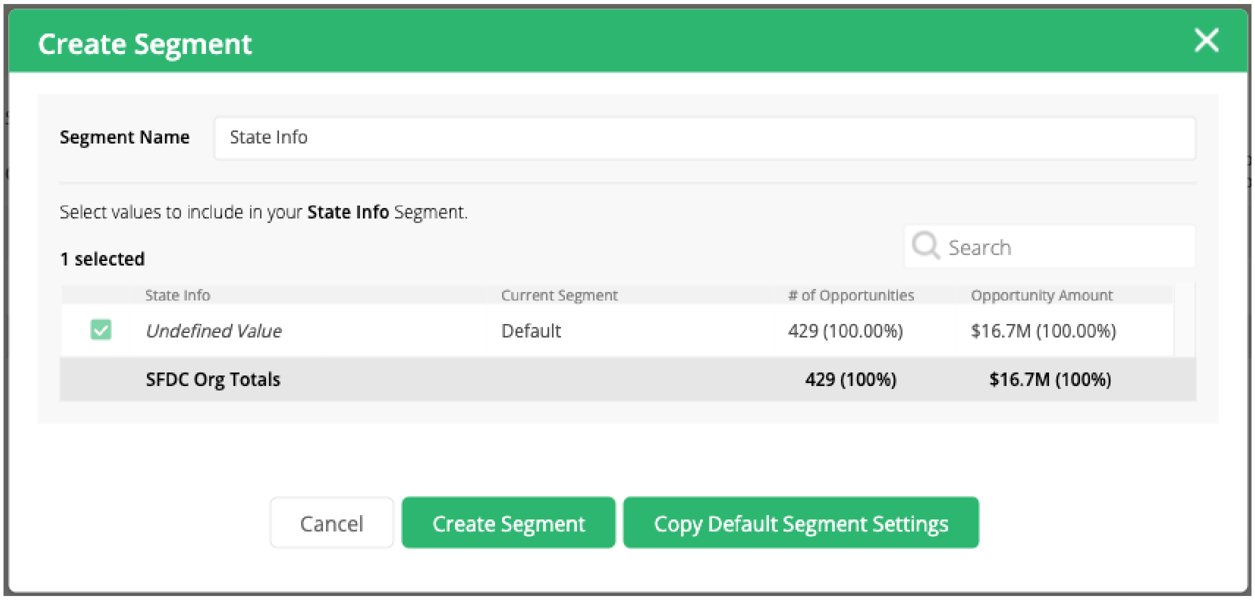
Multi-Segment Attribution allows you to create different settings for different, mutually exclusive groups of Opportunities. The groups must be defined with one singular opportunity field and the field type has to be a string, so it could be a formula field with string type defined as Formula(String), or just a Text field, if not formula.



Creating a New Segment

To create a new segment, select the desired Opportunity Field and click the Create Segment button.

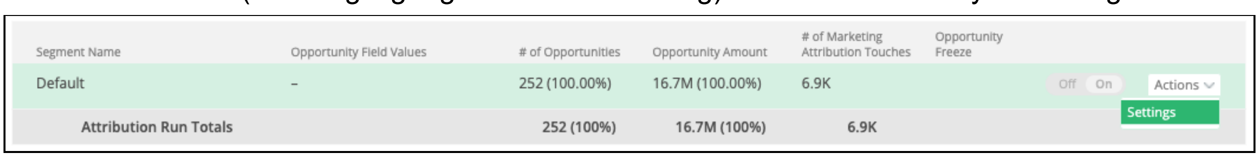
The screen you see next depends on the Opportunity Field you choose for the segment. For most segments you will see this screen.

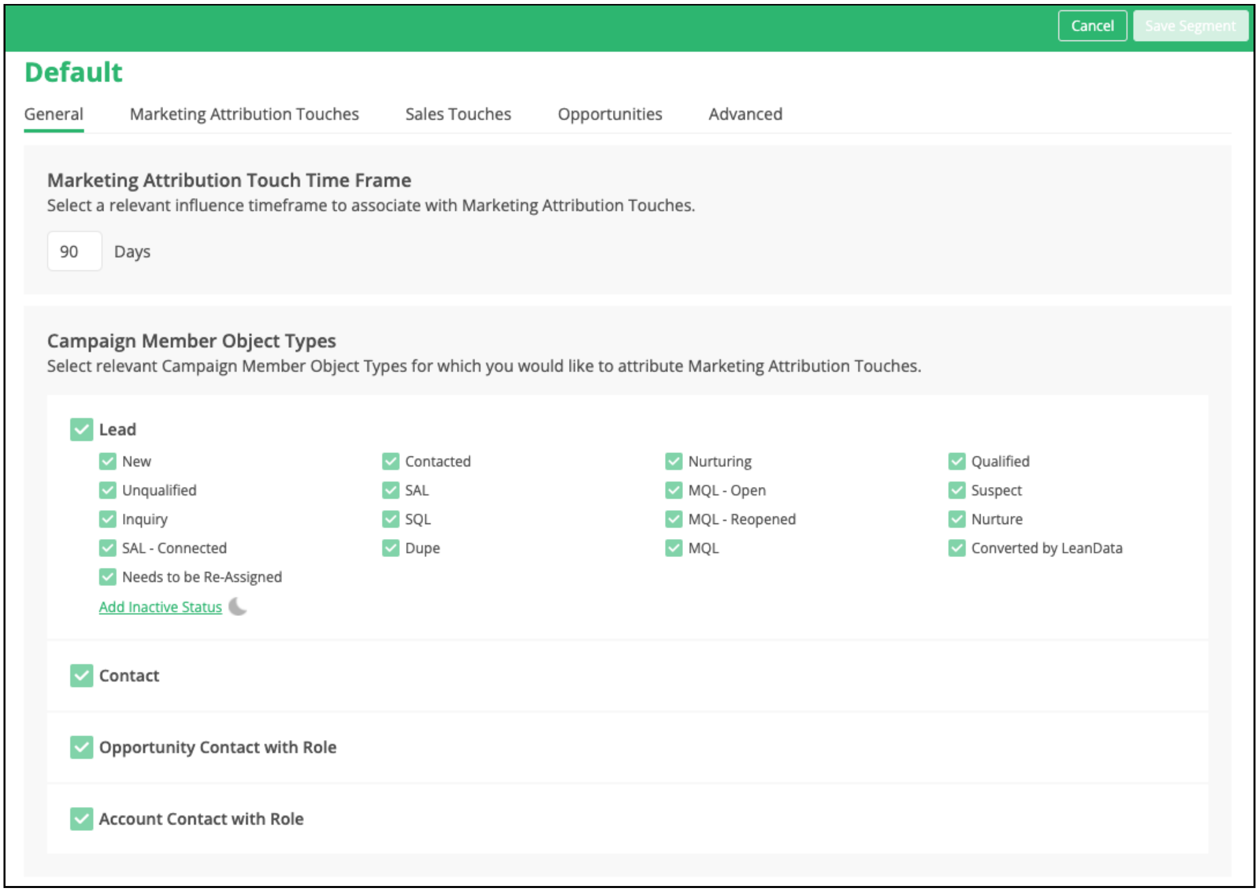


Enter a name for the segment. As needed, search for the desired value(s). Select the needed value(s) and click Create Segment.

Segment Settings

For the majority of folks that choose to simply use one default segment, you can hover over that row and click on it (it will highlight green when hovering) in order to access your settings.





General

Marketing Attribution Touch Time Frame

Also known as the Opportunity Lookback Window. This is the number of days that you set which determines how many days *before* the opportunity create date we will count relevant campaign memberships as marketing touches. For example, if your Marketing Attribution Touch Time Frame is 365 days and someone attended a webinar 380 days ago that touch would ***not*** count for an opportunity that is created today.

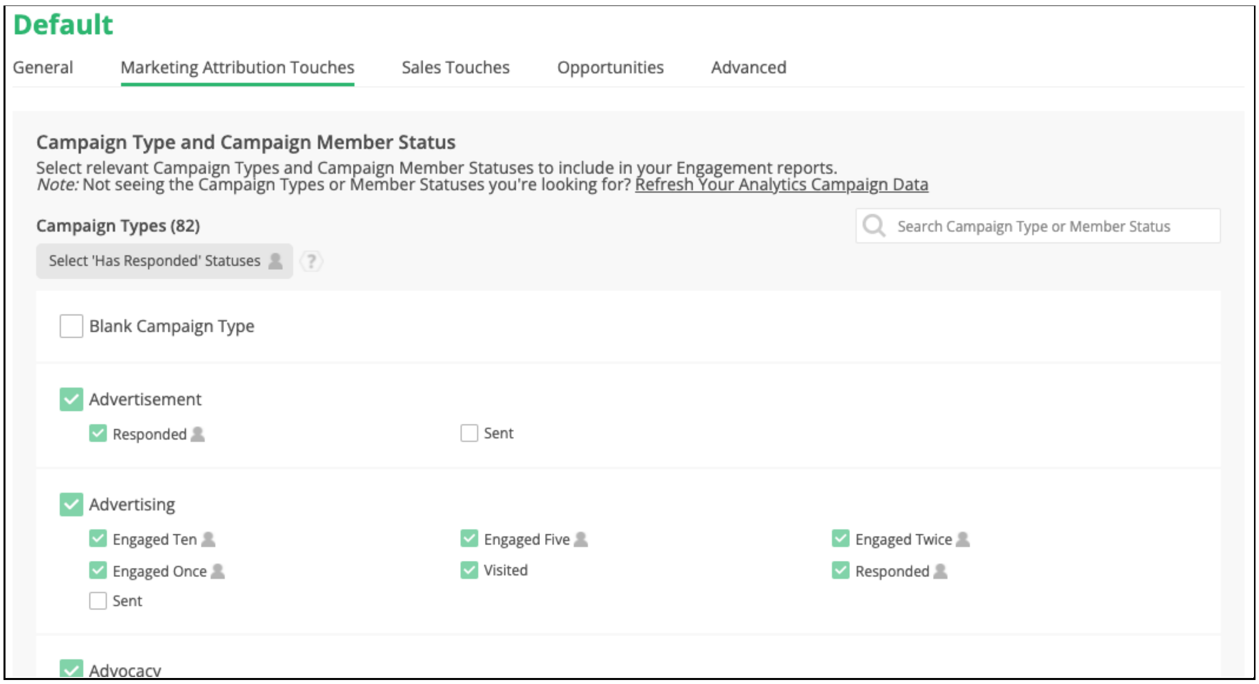
Campaign Member Object Types

Select which campaign member object types you would like to include in the attribution model as well as which lead statuses you would like included vs. excluded for Lead Campaign Members.

Please note: When selecting your settings in the Settings pages, please remember to click ‘Save’ in the upper right corner.

Marketing Attribution Touches

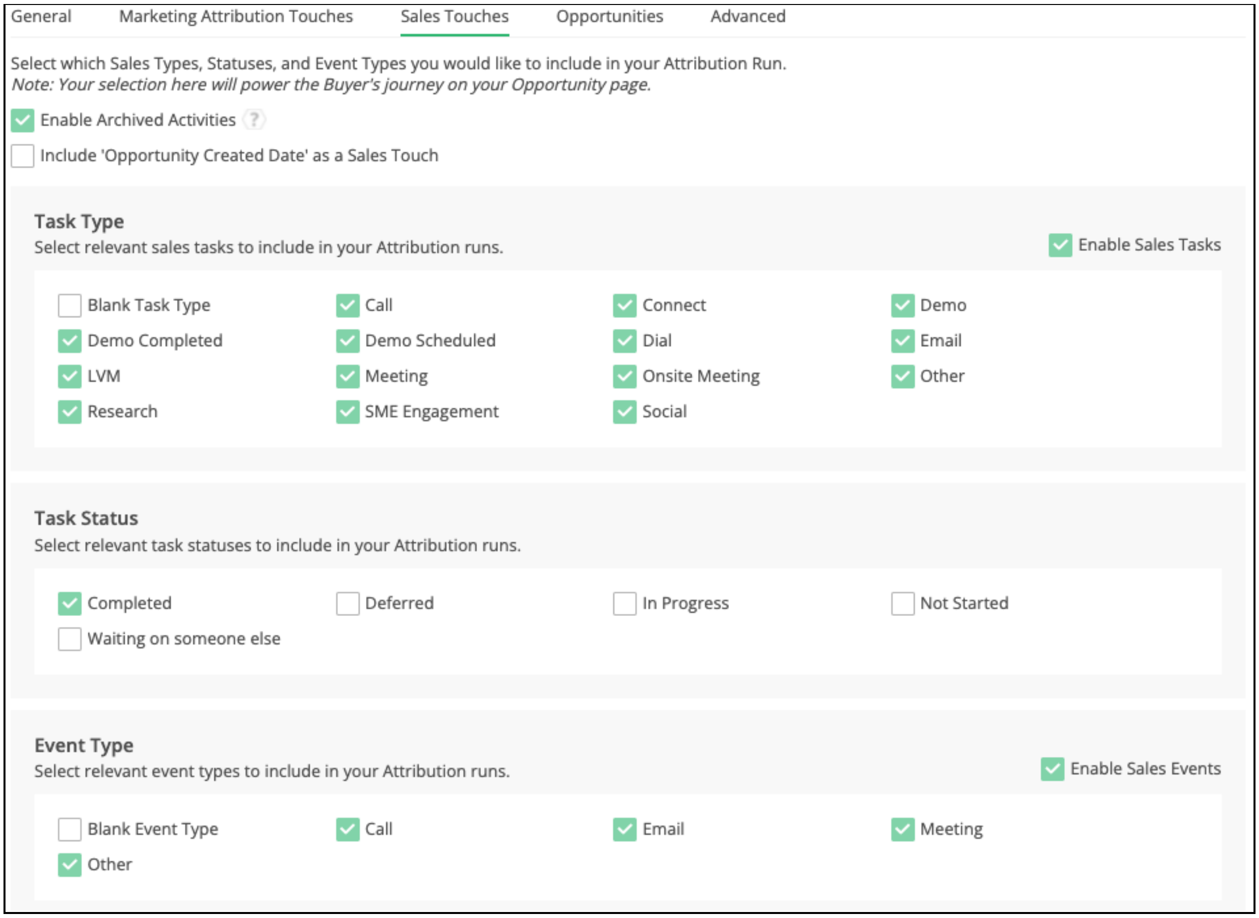
This page is used to select which campaign memberships are relevant and will be created as marketing touches. To include a select campaign type, click the checkbox of that campaign type and the underlying member statuses that are relevant to the attribution model for that campaign type. If you select a campaign type and member statuses but receive an error upon saving, it is likely that there are no existing campaign members for what you selected. You will have to unselect those and reselect them when there are existing campaign members for those campaign types/member statuses.



Please Note: Keep in mind that contrary to the old attribution tool, this is an ***inclusionary*** model so if there are new campaign types or member statuses that are added, you will have to access the settings page and select them if you would like them to be included.

Sales Touches

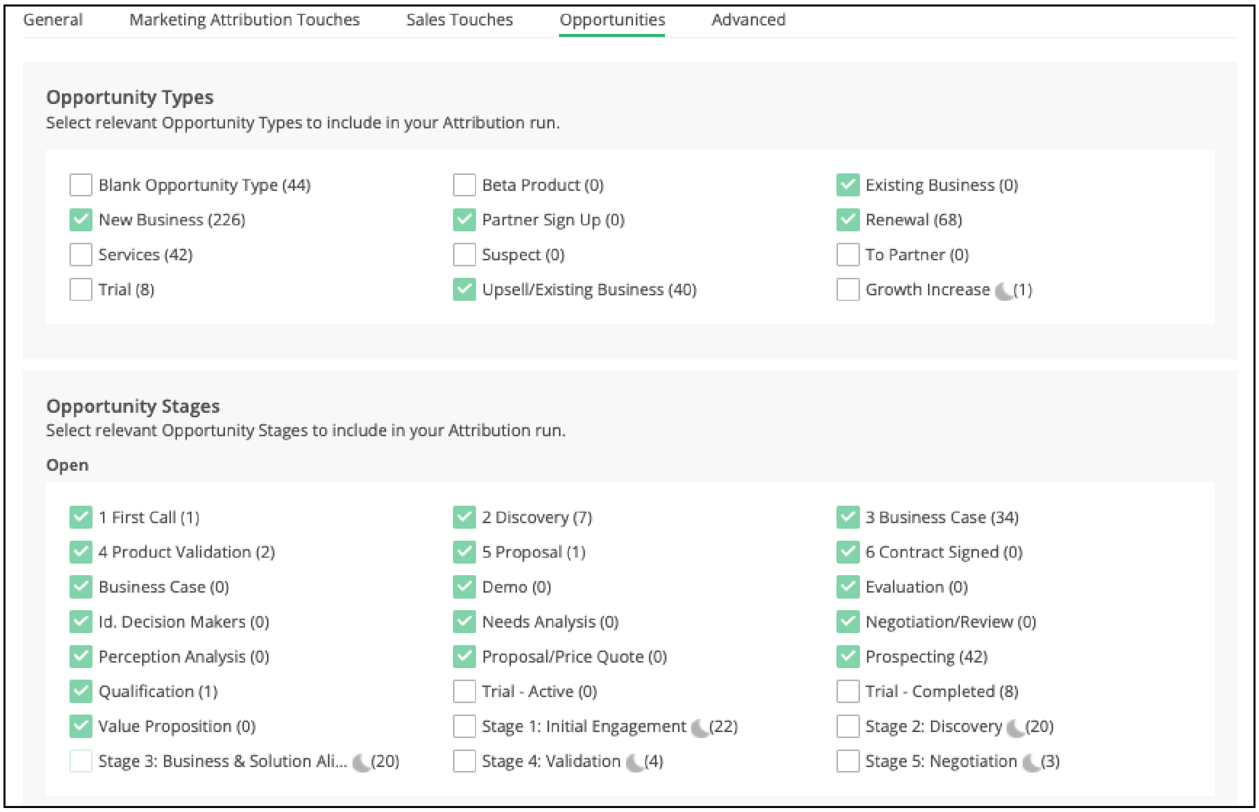
This is where you can set which Tasks and Events are included as Sales Touches for your Attribution Model. Keep in mind that Sales Touches cannot be reported on and are not given attribution. They do show up on the opportunity Buyer's Journey Visualforce Page and can act as a filter on your reports to isolate touches or attribution metrics for marketing touches that occur ***prior to the first sales touch*** to assist with tracking what's truly marketing sourced.



Select which tasks and events are relevant based on their Task Type, Status, or Event Type. If those three fields are too broad you can also add filter conditions on the task and event objects in the “Filters” section under “Advanced” in Settings.

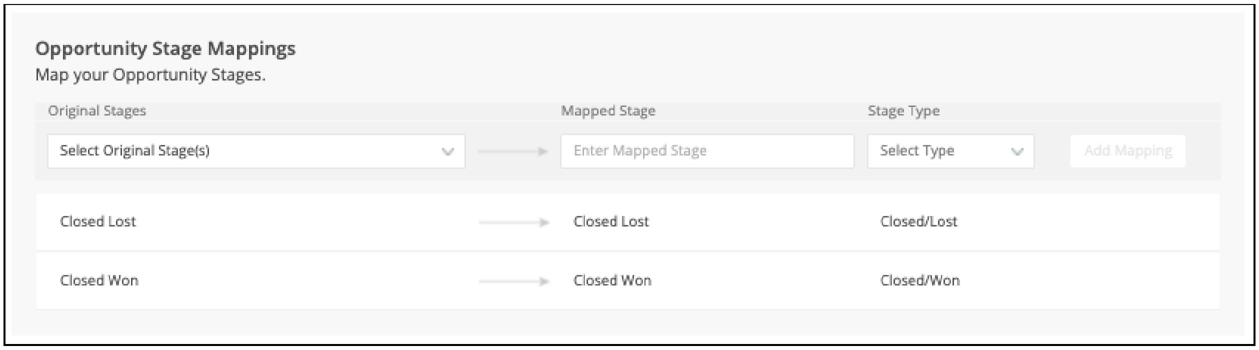
Opportunities

This section allows you to define which Opportunities will actually receive attribution. For example, you might not want Renewals or some operational opportunity type included in your attribution totals. You can exclude opportunities based on Opportunity Type, Opportunity Stage, Closed/Won Stage, or Closed/Lost stage.



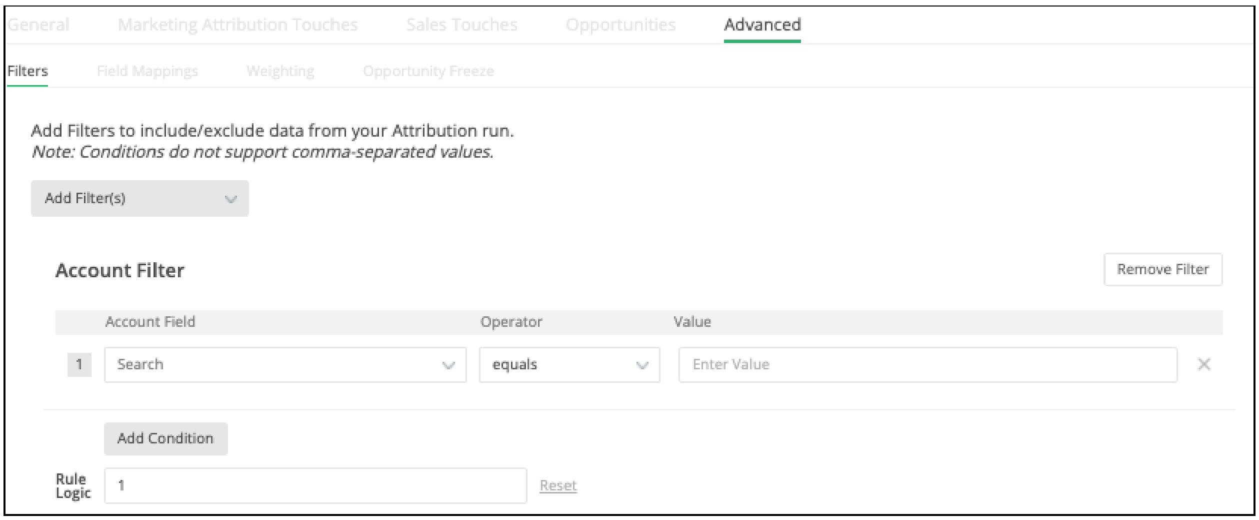
Opportunity Stage Mapping

The Opportunity Stage Mapping section allows you to Map opportunity stages. For example, if you'd like to count a certain opportunity stage as closed won that's not already marked as closed won in your SFDC setup you can map it in that section and indicate it as such under 'stage type'.



Advanced

The Advanced Tab allows you to add filters to include/exclude data in the Attribution run.

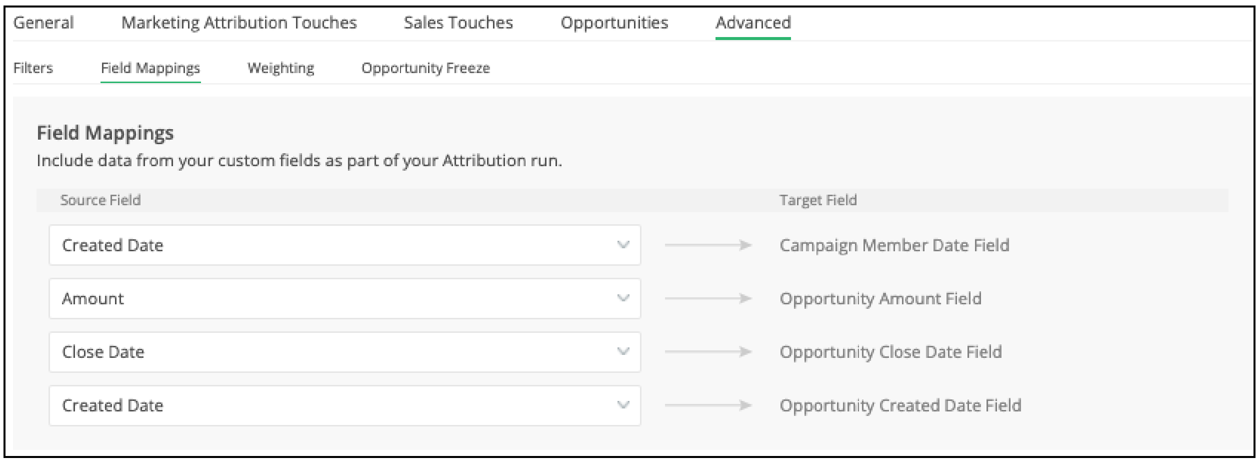


Filters

These are equivalent to ‘custom filters’ in the old attribution tool. This section allows you to filter records in or out based on any standard or custom field on any of the Marketing Attribution Touches’ related objects using tuple filters with operators.

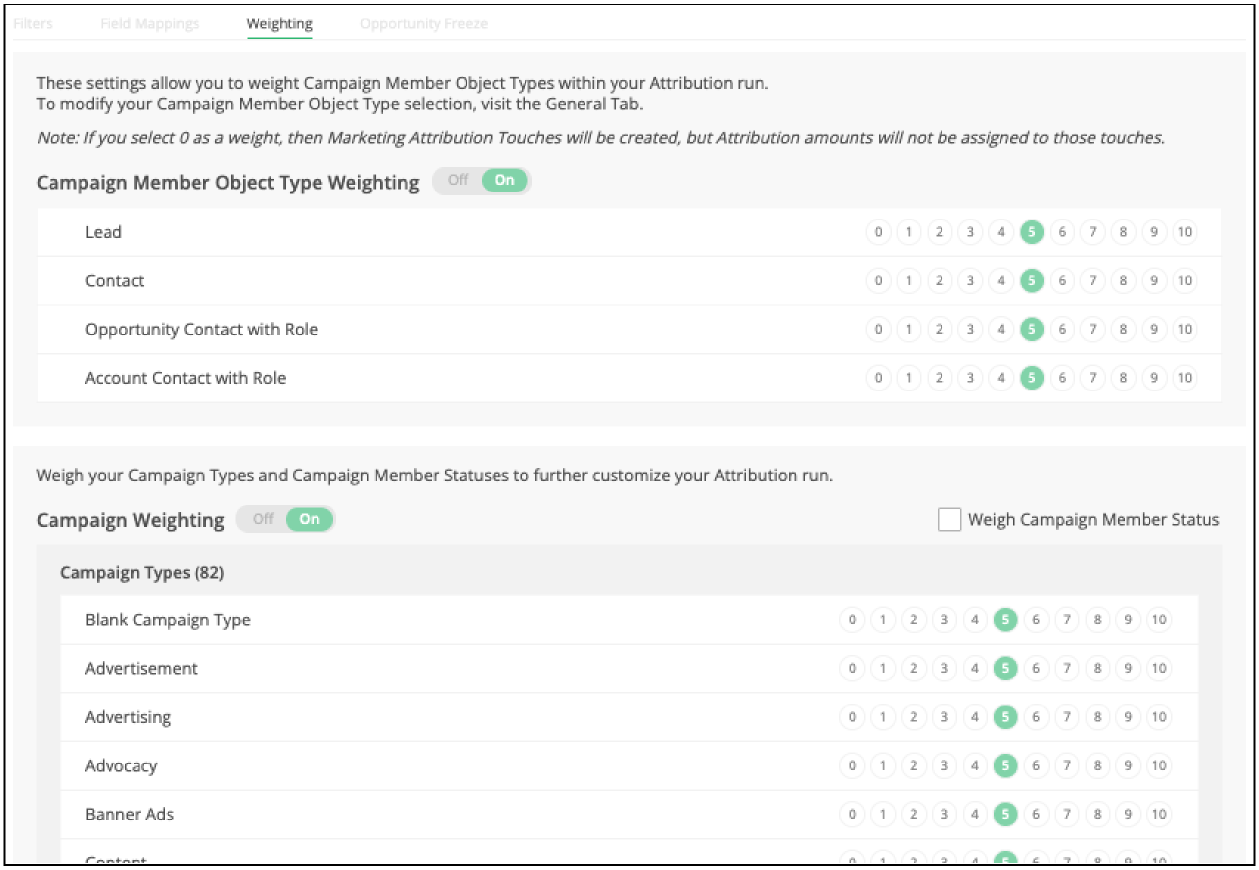
Please note that these filters are ***inclusionary*** so if you would like to exclude something you would use operators like ‘not equal to’ or ‘does not contain’.

Field Mappings
This section allows you to switch from using the default SFDC fields, to custom fields that are more pertinent to your business. One common use case is that the standard amount field is used for attributing dollar amounts, unless mapped to a different currency field on the opportunity object.Another example is that by default, we use the campaign member create date to determine when a marketing touch (campaign membership) actually happened. If there is a different date/time field on the campaign member object, that better indicates when the marketing interaction occurred (some users pick a Member First Associated Date or First Responded Date), you can map to that field.



Marketing Touch Weighting

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 - 10 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 effectiveness as if all campaign types are weighted 10.

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

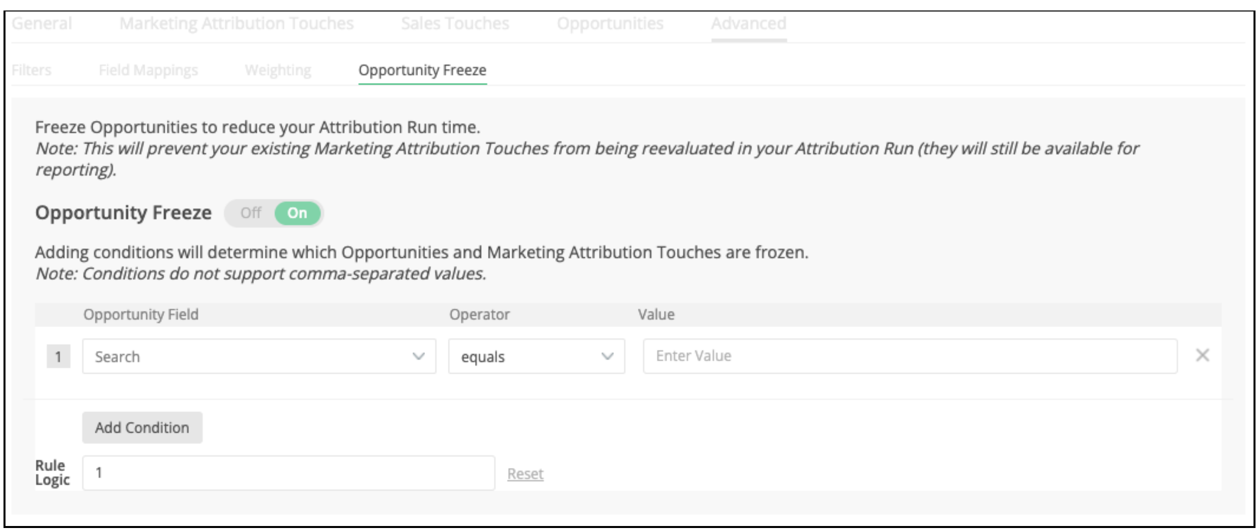
        - 1 relevant marketing touch on Opportunity A
        - Campaign Member Status: attended

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: 6
    - Attribution
        - Campaign X campaign member: $250 [$1,000 / (2 / (2 + 6))]
        - Campaign Y campaign member: $750 [$1,000 / (6 / (2 + 6))]

Opportunity Freeze

Opportunity Freeze is used to reduce long attribution run times by "freezing" a portion of the data set that we know is not going to change. Each attribution run deletes all marketing touches and recalculates everything all over again. With freeze on, you can use opportunity fields to dictate which opportunities do not have attribution re-run. For example, a popular filter that can be used is ['closed' equals true AND 'closed date' greater than Last 365 Days], meaning that any opportunity that was closed more than a year ago will be frozen.



Please note: If any changes occur to opps that fit the freeze criteria, those opps will not be considered in the run so this may lead to data inaccuracies. Please make sure the opps you are freezing will not change at all, and if they do, you'll need to complete a one time run without opp freeze after those opp changes are made.

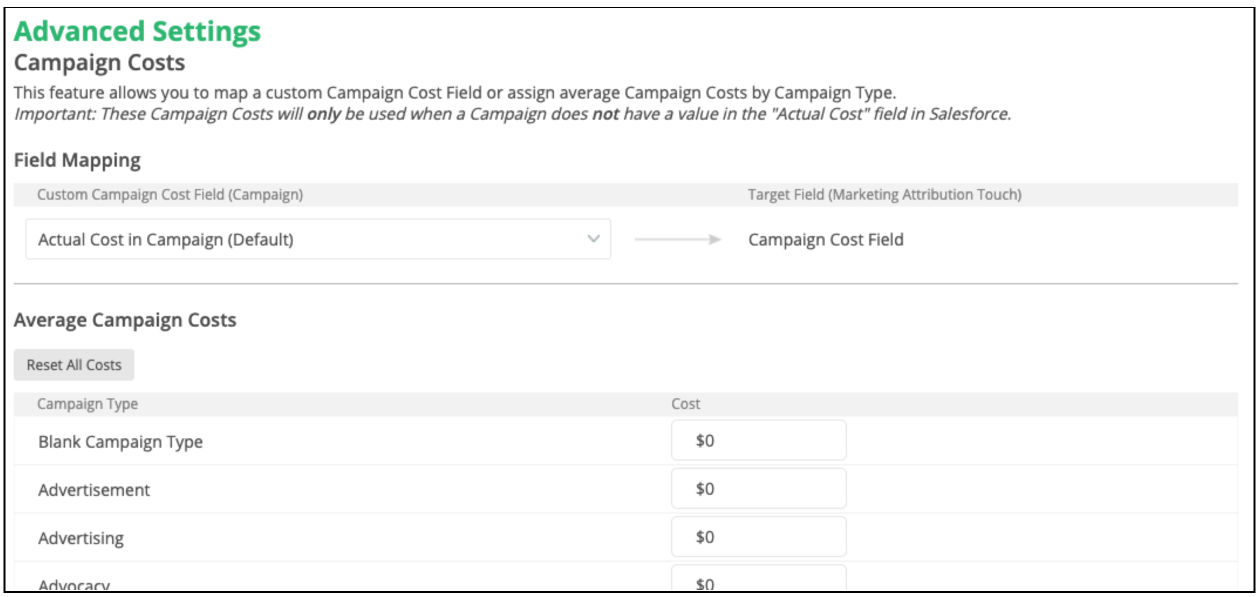
Advanced Settings

The advanced Settings are home to the settings for Campaign Costs, Marketing Attribution Touch Mapping, and using Multiple Currencies in your attribution runs.

Campaign Costs

Campaign Costs allows a marketer to add a “placeholder” cost while they are waiting for financial costs to be calculated for a particular campaign. When actual campaign costs are added to the Actual Cost field in Salesforce, they will overwrite the average cost.

Input the dollar value of the average campaign of this type. You have the option of removing all values by pressing the “Reset All Campaign Costs” link at the top.



Field Mapping

This allows you to map to a custom campaign cost field from your campaign object.

Average Campaign Costs

This feature allows you to set an average campaign cost by campaign type to be used when there is not a value populated in the standard field ‘Actual Cost’

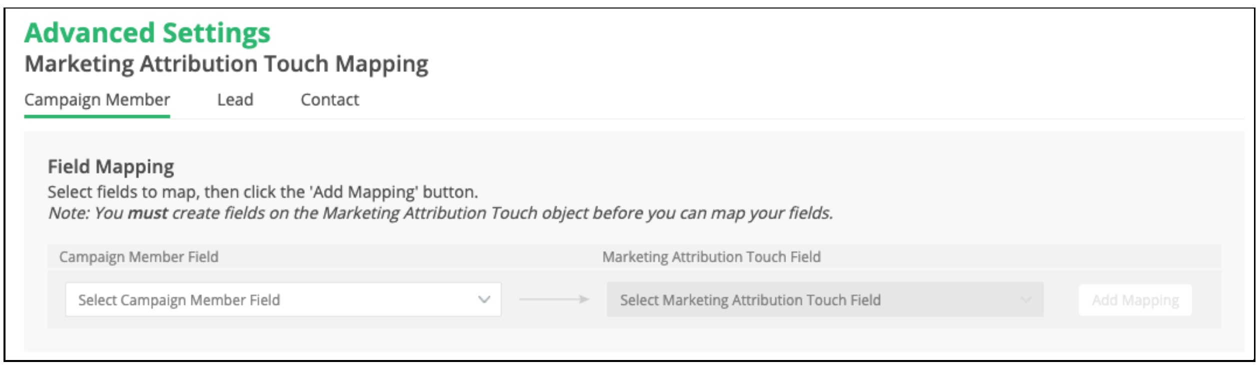
Marketing Attribution Touch Mapping

Marketing touch mapping allows you to map fields from the campaign member, lead, and contact objects to the marketing attribution touch object. To do so, please create a field on the marketing attribution touch and temporary marketing touch objects with the same data type as the field you're trying to map.

Popular use cases for this tool are if you're trying to map UTM values from the campaign member object to the Marketing Attribution Touch object to track attribution from a UTM source perspective. Another use case is consolidating fields from lead and contact objects into one marketing attribution touch field such as full name from lead and contact.

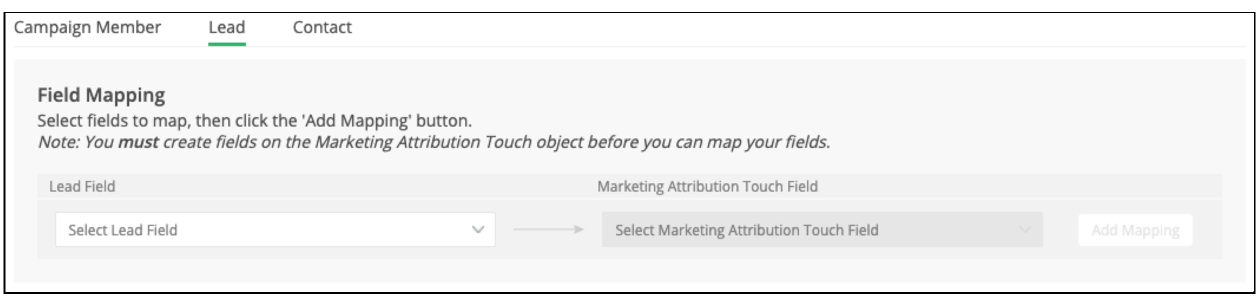
Campaign Member

Use the Campaign Member section to map the Campaign Member Field to the corresponding Marketing Attribution Touch Field.



Lead

Use the Lead section to map the Lead Field to the corresponding Marketing Attribution Touch Field.



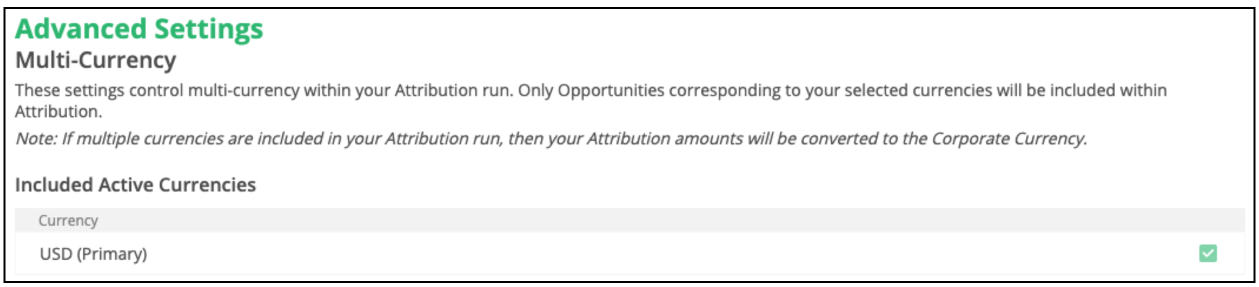
Contact

Use the Contact section to map the Contact Field to the corresponding Marketing Attribution Touch Field.

Multi Currency

The Multi Currency Settings are used to control multiple currencies in your Attribution runs. Only Opportunities with the selected currencies will be included in the run.

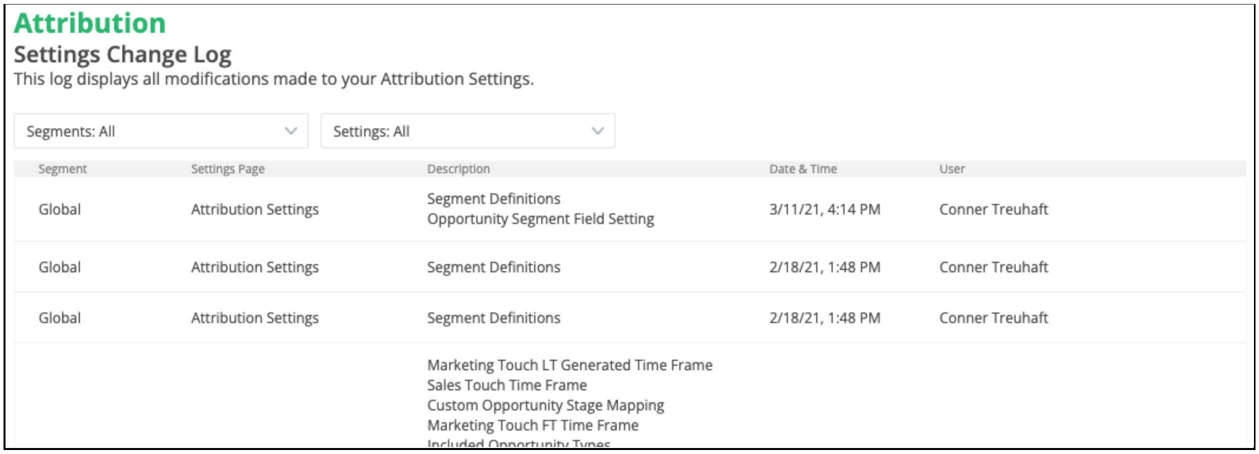
Please Note: If multiple currencies are included in your Attribution run, then your Attribution amounts will be converted to the Corporate Currency.



Settings Change Log

The Settings Change Log displays all changes that are made to your Attribution settings. Each entry includes:

- Segment - Global if you aren't using multi-segment.
- Settings Page - Where the changes occured
- Description - Description of the change
- Date and Time - When the change occured
- User - Who made the changes



When you mouse over each of the log entries, you will see the row becomes highlighted and a View Logs button will appear. Clicking on the View Logs button will display a page with more details about the changes.