

LeanData Attribution

Analytics Dashboard Guide 3.0



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Overview

The purpose of this document is to provide LeanData's attribution customers with a guide on using dashboards and reports in LeanData Attribution. This material is meant to be a quick-guide so if you need any additional help or resources please visit our LeanData help center where we have much more in-depth guides and walkthroughs for all of these features. <https://leandatahelp.zendesk.com/hc/en-us>

What is Attribution?

The Attribution data is in the form of Marketing Attribution Touches, which are relevant campaign memberships that are created within the relevant time frame of an opportunity (which is either while the opp is open or within the *lookback window* from the opportunity create date). The lookback window, which you define in the settings, is the number of days prior to the opportunity create date that you will count relevant campaign memberships as marketing touches.

Attribution Metrics

- **MT Attribution Amount**
Description: Dollar value of the Opportunity evenly distributed across all campaign member touches(Member Touch or MT) on an opportunity.
- **MT Generated Attr Amount**
Description: Dollar value of the opportunity evenly distributed across all campaign member touches on an opportunity where marketing touches occur PRIOR opportunity creation.
- **MT Accelerated Attr Amount**
Description: Dollar value of the opportunity evenly distributed across all campaign member touches on an opportunity where marketing touches occur AFTER opportunity creation.
- **FT Generated Attribution**
Description: First relevant marketing touch (First Touch or FT) that occurs prior to the Opportunity creation date gets 100% of the attribution value. Looking specifically during that opportunity lookback window prior to the opp being created.
- **FT pre-sales**
Description: Assigns 100% attribution to the first relevant marketing touch prior to the first sales touch. If no relevant marketing touch occurs prior to a sales touch, no attribution value is assigned. Note first sales touch may include Opportunity creation if the option to count Opportunity creation as a sales touch has been selected.

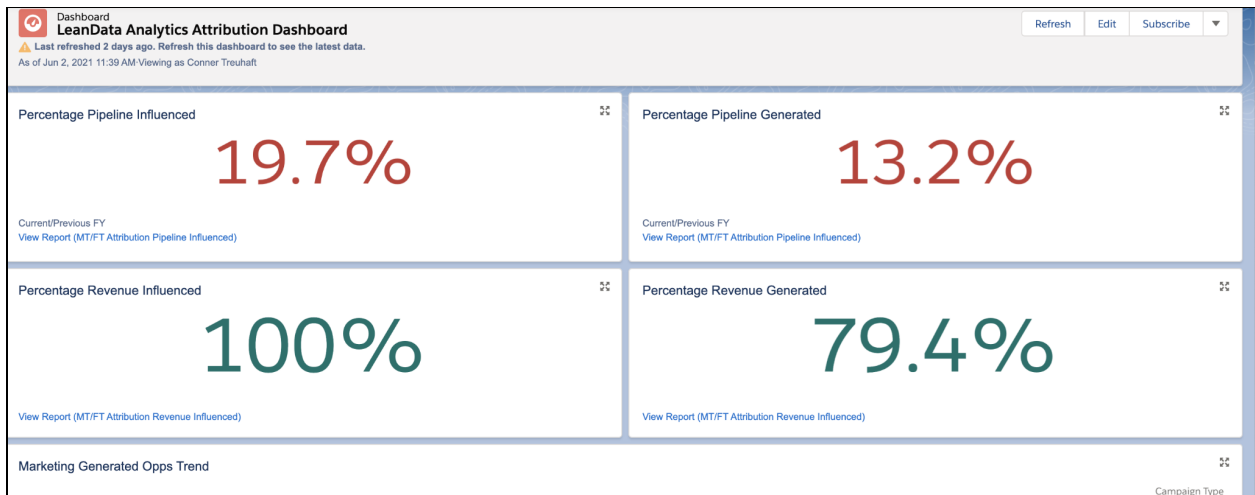
- **LT Generated Attr Amount**

Description: Dollar value of the Opportunity attributed to the campaign with the last relevant campaign member touch (Last Touch or LT) prior to opportunity creation.

Analytics Attribution Dashboard

This dashboard is our out-of-box best practice dashboard that customers on our more recent attribution 3.0 platform can download directly into their Salesforce. To download this dashboard, please reach out to your LeanData Customer Success Manager in order to obtain the download link.

The main report type to use for attribution reports is the Marketing Attribution Touch Report (Custom).



Please Note: These screenshots are from LeanData’s Sandbox and does not reflect how the dashboard component data looks in your production instance.

Dashboard Components

Percentage Pipeline Influenced - Percentage of opportunity dollars that have at least one marketing touch on the opp at any point (either while the opportunity is open or during the lookback window).

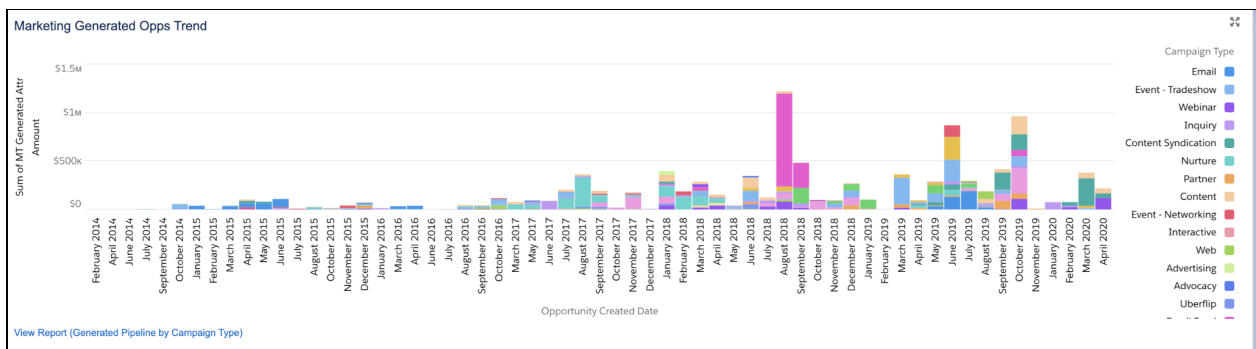


Percentage Pipeline Generated - Percentage of opportunity dollars that have at least one marketing touch on the opp prior to the opportunity create date (during the opportunity lookback window).



Percentage of Revenue Generated and **Percentage of Revenue Influenced** are the same as the above two with “closed won” filters on each report indicating percentage revenue influence.

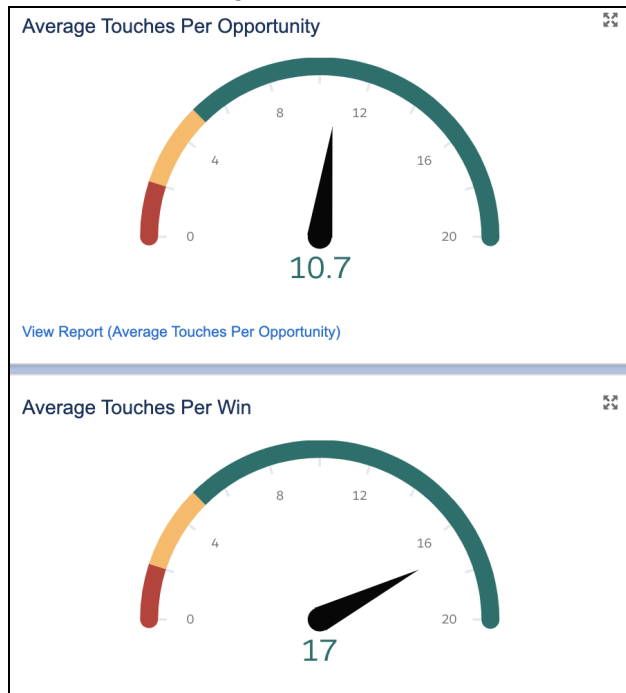
Marketing Generated Opps Trend: What is the sum of MT Generated Attribution Amount split by campaign type by month of the opportunity create date. Answers the question of how am I sourcing opportunities over time (these touches all occurring before Opportunity create date but within the opportunity lookback window).



For example: For opportunities created in March of 2020, Content Syndication was the biggest source of MT Generated Attribution for those opps.

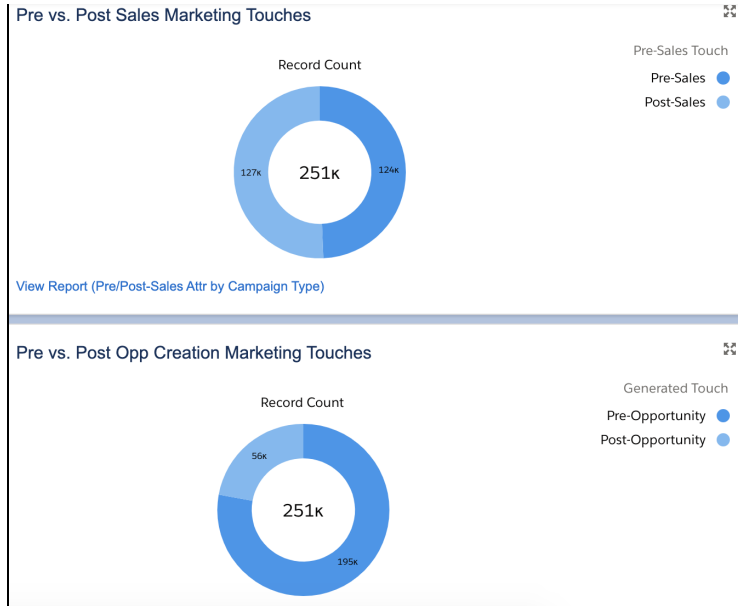
Average Touches Per Opportunity - Average number of marketing touches per opportunity (any opportunity that has marketing touches)

Average Touches Per Win - Average number of marketing touches per Won Opportunity (any closed won opportunity that has marketing touches)



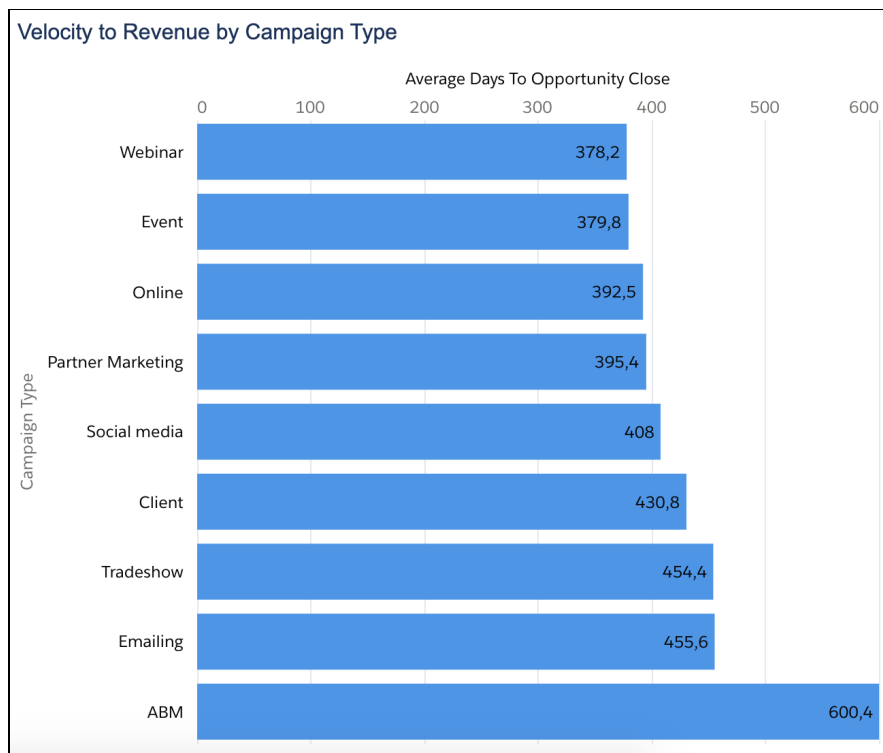
Pre vs. Post Sales Attribution - Number of marketing touches that occurred prior to the first sales touch on an opportunity, vs. after the first sales touch (within the relevant lookback window)

Pre vs. Post Opp Creation Marketing Touches - Number of marketing touches that occurred prior to the opportunity create date on an opportunity, vs. after the opportunity create date (within the relevant lookback window).



Velocity to Revenue by Campaign Type - What is the average number of days from pre-opportunity touches, to opportunity close date when there's at least one pre-opp touch by one of these campaign types on closed won opps.

For Example: When there's at least one pre-opportunity touch from Webinar, on average it's about 378 days from that touch to the opportunity close date.



Top Campaigns by MT Attribution

- **MT Generated** = Opportunity amount split evenly amongst all touches that occur prior to the opportunity create date.
- **MT Attribution** = Opportunity amount split evenly amongst all touches on an opp.
- **MT Accelerated** = Opportunity amount split evenly amongst all touches that occur after opportunity create date (while the opp is open).
- **Win Rate** = sum of closed won divided by sum of closed opps where there is at least one marketing touch.

Related Campaign: Campaign Name ↓	Sum of MT Generated Attr Amount	Sum of MT Attr Amount	Sum of MT Accelerated Attr Amount	f_x Total Marketing Touches	f_x Total Opportunities Touched	f_x Win Rate
NALA_DL_WBN_202001_DL12_VT22_Opt Cybersecur...	\$100,000.000	\$100,000.000	\$100,000.000	5	1	#Error!
CS - 2020-05 - PureB2B - MM/CE - State of RevOps Rep...	\$0.000	\$72,009.333	\$101,636.667	15	10	10.00%
EvF 2020-08-05 Virtual ABM Workshop	\$0.000	\$70,000.000	\$70,000.000	1	1	0.00%
CS - 2002 - Valays - SMB & MM - State of RevOps Report	\$98,828.332	\$49,363.166	\$14,687.500	14	6	14.29%
CS - 2020-07 - Valays - MM/CE/ENT TA + ICP - State of...	\$0.000	\$37,764.706	\$50,327.381	5	5	0.00%
CS - 2002 - Valays - SMB & MM - Defining RevOps ebook	\$44,573.332	\$36,332.888	\$11,562.500	12	4	0.00%
CS - 2020-04 - PureB2B - MM/CE - State of RevOps Rep...	\$0.000	\$34,292.484	\$47,924.107	6	5	0.00%
CS - 2003 - Valays - MM & CE - State of RevOps Report	\$40,041.666	\$30,940.410	\$15,757.577	10	8	12.50%
הזדמנויות פתוחות לביצוע	\$5,775.000	\$38,007.600	\$51,300.000	35	5	0.00%

View Report (Attribution by Campaign)

MT Attribution by Campaign Type

- **MT Generated** = Opportunity amount split evenly amongst all touches that occur prior to the opportunity create date.
- **MT Attribution** = Opportunity amount split evenly amongst all touches on an opp.
- **MT Accelerated** = Opportunity amount split evenly amongst all touches that occur after opportunity create date (while the opp is open).
- **Win Rate** = sum of closed won divided by sum of closed opps where there is at least one marketing touch.

Campaign Type ↓	Sum of MT Generated Attr Amount	Sum of MT Attr Amount	Sum of MT Accelerated Attr Amount	f_x Total Marketing Touches	f_x Total Opportunities Touched	f_x Win Rate
Content Syndication	\$368,623.802	\$609,545.953	\$566,858.781	234	27	7.14%
Content	\$112,036.190	\$168,783.105	\$170,791.329	56	23	9.09%
Webinar	\$145,000.000	\$143,805.556	\$133,405.555	16	9	12.50%
Event - Field	\$22,500.000	\$75,277.778	\$70,000.000	3	3	0.00%
Web	\$0.000	\$50,107.622	\$77,010.548	20	11	27.27%
Event - Tradeshow	\$15,750.000	\$40,248.428	\$63,890.308	34	8	0.00%
Sponsored Webinar	\$0.000	\$27,801.011	\$38,874.623	16	9	0.00%
Inquiry	\$92,710.000	\$7,678.334	\$0.000	4	4	25.00%
הזדמנויות פתוחות לביצוע	\$0.000	\$7,750.000	\$0.000	1	1	0.00%