

LeanData Attribution

Opportunity Freeze 3.0



Overview

LeanData's Attribution batch will recalculate Marketing Touch data against all Opportunities that have not been otherwise filtered out in your Attribution settings. Some Opportunities — particularly older Opportunities — may not require recalculation on every Attribution run, as there may not have been any new activity against them. Opportunity Freeze is a feature that allows you to define a set of Opportunity criteria against which LeanData Attribution will not recalculate in its subsequent batches. Existing Marketing Touches from earlier runs will remain in your system.

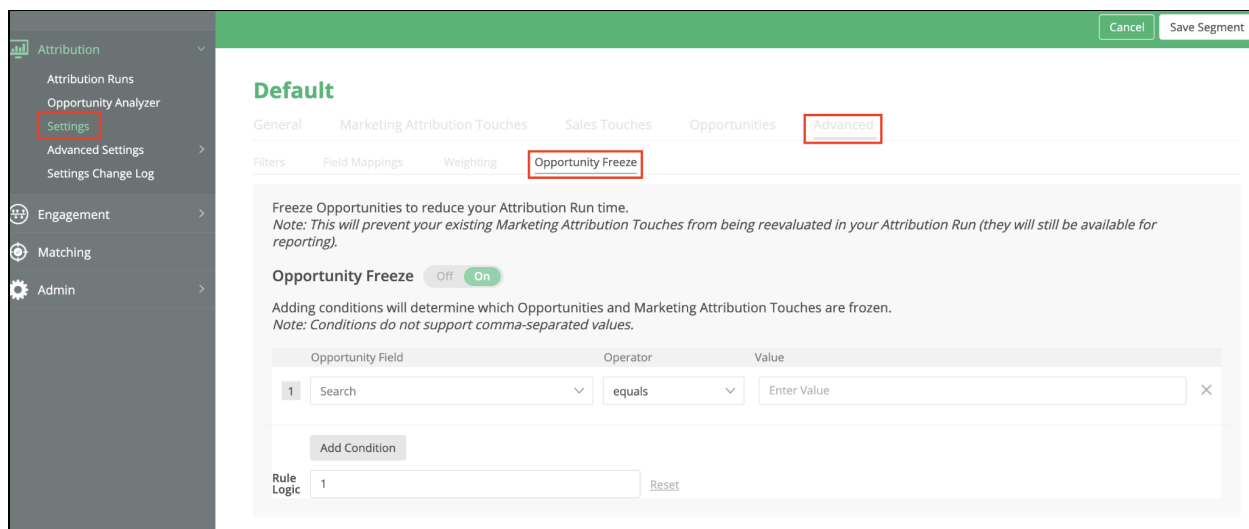
Main Benefits of Opportunity Freeze

- Reduced Attribution run times as less Opportunities are being iterated over
- Maintain reportability of the Marketing Touch data set

The main assumption of Opportunity Freeze is that older Opportunities will generally not have many changes to their Marketing Attribution so it is safe to freeze them.

Setting Up Opportunity Freeze

1. Navigate to the LeanData Analytics Application → Settings → Select the Segment you would like to set Opportunity Freeze for (for most orgs it'll just be 'default') → Advanced → Opportunity Freeze.



The screenshot shows the 'Default' segment settings page in the LeanData Analytics Application. The left sidebar contains navigation options: Attribution (with sub-items: Attribution Runs, Opportunity Analyzer, Settings, Advanced Settings, Settings Change Log), Engagement, Matching, and Admin. The main content area is titled 'Default' and has tabs for General, Marketing Attribution Touches, Sales Touches, Opportunities, and Advanced (which is selected). Under the 'Advanced' tab, there is a sub-tab for 'Opportunity Freeze'. The 'Opportunity Freeze' section is currently turned 'On'. Below this, there is a text box explaining the feature: 'Freeze Opportunities to reduce your Attribution Run time. Note: This will prevent your existing Marketing Attribution Touches from being reevaluated in your Attribution Run (they will still be available for reporting)'. A note states: 'Adding conditions will determine which Opportunities and Marketing Attribution Touches are frozen. Note: Conditions do not support comma-separated values.' There is a table for defining conditions with columns for Opportunity Field, Operator, and Value. One condition is added: 'Search' equals 'Enter Value'. There is an 'Add Condition' button and a 'Rule Logic' field set to '1' with a 'Reset' button. At the top right of the page, there are 'Cancel' and 'Save Segment' buttons.

2. Toggle on the Opportunity Freeze Setting.

Opportunity Freeze

This feature prevents your existing Marketing Touches from being reevaluated in your Attribution Run. Freeze Opportunities to reduce your Attribution Run time (your Marketing Touches will be available for reporting).

Opportunity Freeze Off On

Adding conditions to Opportunities will determine which Opportunities and Marketing Touches are frozen. Only opportunities that meet the conditions will be frozen.

Note: Only one condition can be added per row.

3. Click Add Condition Set.

4. 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)). Values for date fields support date literals.

Opportunity

	Opportunity Field	Operator	Value	
1	Close Date	less than	Yesterday	<input type="button" value="X"/>
2	Stage	equals	Closed Won,Closed Lost,Closed	<input type="button" value="X"/>

Rule Logic:

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