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First Touch & Multi Touch Attribution

MARKETING NEEDS TO SHOW HOW THEIR INITIATIVES
ARE TIED TO BUSINESS RESULTS.
UNDERSTANDING HOW MARKETO ATTRIBUTES PIPELINE
AND REVENUE TO YOUR PROGRAMS IS KEY TO HELPING
YOU MEASURE MARKETING'S PERFORMANCE.

First Touch & Multi Touch Attribution Overview

In this session we'll discuss how these items impact marketers and then go over some attribution basics.

What's In It for Marketers?
What's your Business Goal?
  • Which nurturing/acquisition programs should you continue to invest in?
  • What should you discontinue/make changes to?

Why is this important & how?
  • Marketing has a limited budget that needs to be spent wisely
  • You need to show results: how do you determine what is effective in generating and closing opportunities?

Attribution Basics

Attribution Checklist
Set up every program this way and you are off to a great start:
  • Capture Progression Statuses using Status Campaigns
  • Define Success for Leads in Programs
  • Automate Acquisition by building all Assets local to a Program
  • Add Period Costs to Programs and Events
  • Define Tags and Custom Channels with Reporting in Mind

Attribution Definitions
  • **Touch**: Any Marketing Program in which Lead is a member and created by the program (acquisition) and/or reached Success status
  • **Touch Date**: When Lead is acquired by the program or reached success status for the Program
  • **Acquisition Attribution**: Allocate all the value to a program (with cost) that creates (acquires) the Lead. A Lead can only be acquired by one program. Acquisition program and acquisition date can be changed
  • **Success Attribution**: Allocate value across ALL programs (with cost) in which Lead reached the Success status

Attribution Metrics
Attribution tracks Program influence on:
  • **Opportunity Creation (Pipeline)**: Tracks touches that happen before Opportunity Creation
  • **Opportunity Close (Revenue)**: Track touches that happen before Opportunity Close.

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Actionable Analytics

Business Question: Which programs should I continue to invest in?

Insights

1. Programs that:
  • Helped us acquire new leads?
  • Influenced the most opportunities, pipeline & revenue?
2. How much pipeline credit is last quarter's webinar getting?
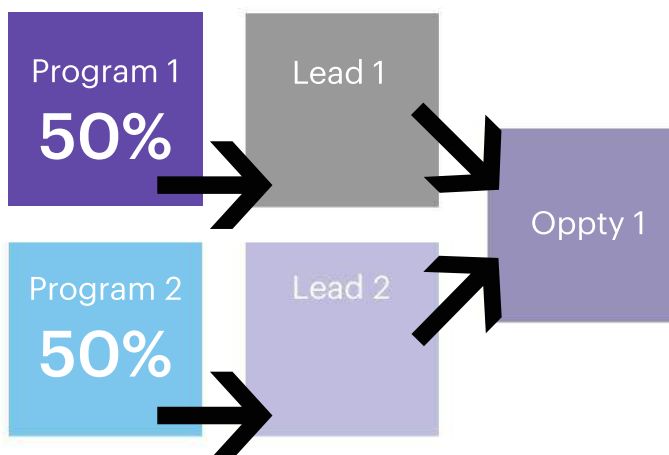**3.** Cost per new name for each program channel?

Actions

1. Stop/Modify Programs that are not working
2. Repeat Programs that are not working & create similar ones

Attribution Example

How is credit split when multiple Programs result in one opportunity?

Each program gets 50% of the credit for this opportunity

Program 1 **50%**   Lead 1

Program 2 **50%**   Lead 2

Oppty 1

First Touch Attribution Rules

1. Acquisition determines marketing influence. Program success is not necessary
2. Only one program can get credit for acquiring the lead
3. Acquisition must happen before opportunity created to get pipeline credit
4. Acquisition must happen before opportunity closed to get revenue credit
5. Lead/Contact must have a ROLE in the opportunity. Date when the Lead/Contact is associated to the opportunity does not impact attribution

Multi Touch Attribution Rules

1. Program success determines marketing influence
2. Success must happen before opportunity created to get pipeline credit
3. Success must happen before opportunity closed to get revenue credit
4. Lead/Contact must have a ROLE in the opportunity. Date when the Lead/Contact is associated to the opportunity does not impact attribution

First Touch Exercises

Calculate the appropriate FT amounts given each scenario. All the information that you need resides in the FT and MT rules. After completing these exercises you will have a clear understanding of how Marketo calculates attribution.

Example 1

6/15/20 Michael is acquired by Tradeshow A

7/1/20 Opportunity 1 ($1000) created and Michael associated

Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				

Example 2

6/15/20 Michael is acquired by Tradeshow A

6/25/20 Michael attends Webinar B

7/1/20 Opportunity 1 ($1000) created and Michael associated

Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				
Webinar B	Opportunity 1				

Example 3

6/15/20 Michael is acquired by Tradeshow A

7/1/20 Opportunity 1 ($1000) created and Michael associated

7/25/20 Michael attends Webinar B

8/1/20 Opportunity 1 closed won

Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				
Webinar B	Opportunity 1				

Example 4

6/15/20 Michael attends Webinar B

7/1/20 Opportunity 1 ($1000) created and Michael associated

Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Webinar B	Opportunity 1				

First Touch Exercises

Calculate the appropriate FT amounts given each scenario. All the information that you need resides in the FT and MT rules. After completing these exercises you will have a clear understanding of how Marketo calculates attribution.

Example 5

		6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1000) created	7/15/20 Michael is associated to Opportunity 1	
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				

Example 6

		7/1/20 Opportunity 1 ($1,000) created	8/10/20 Michael is acquired by Tradeshow A	8/15/20 Opportunity 1 closed won	8/16/20 Michael is associated with Opportunity 1
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				

Example 7

		7/1/20 Michael is acquired by Tradeshow A	7/15/20 Jen is acquired by Tradeshow B	8/1/20 Opportunity 1 ($1,000) created	8/15/20 Michael and Jen are associated with Opportunity 1
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				
Tradeshow B	Opportunity 1				

Example 8

		6/14/20 Jen is acquired by Tradeshow B	6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1,000) created	8/1/20 Opportunity 2 ($2,000) created	8/2/20 Michael and Jen associated with both opportunities	8/15/20 Opportunity 1 ($1,000) closed
Program Name	Opportunity Name	(FT) Opportunities Created		(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won	
Tradeshow A	Opportunity 1						
	Opportunity 2						
Tradeshow B	Opportunity 1						
	Opportunity 2						

First Touch Answers

Example 1

		6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1000) created and Michael associated		
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	1.00	$1,000	0.00	$0

Example 2

		6/15/20 Michael is acquired by Tradeshow A	6/25/20 Michael attends Webinar B	7/1/20 Opportunity 1 ($1000) created and Michael associated	
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	1.00	$1,000	0.00	$0
Webinar B	Opportunity 1	0.00	$0	0.00	$0

Example 3

		6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1000) created and Michael associated	7/25/20 Michael attends Webinar B	8/1/20 Opportunity 1 closed won
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	1.00	$1,000	1.00	$1,000
Webinar B	Opportunity 1	0.00	$0	0.00	$0

Example 4

		6/15/20 Michael attends Webinar B	7/1/20 Opportunity 1 ($1000) created and Michael associated		
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Webinar B	Opportunity 1	0.00	$0	0.00	$0

First Touch Answers

Example 5

		6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1000) created	7/15/20 Michael is associated to Opportunity 1		
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	1.00	$1,000	0.00	$0

Example 6

		7/1/20 Opportunity 1 ($1,000) created	8/10/20 Michael is acquired by Tradeshow A	8/15/20 Opportunity 1 closed won	8/16/20 Michael is associated with Opportunity 1
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	0.00	$0	1.00	$1,000

Example 7

		7/1/20 Michael is acquired by Tradeshow A	7/15/20 Jen is acquired by Tradeshow B	8/1/20 Opportunity 1 ($1,000) created	8/15/20 Michael and Jen are associated with Opportunity 1
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	0.50	$500	0.00	$0
Tradeshow B	Opportunity 1	0.50	$500	0.00	$0

Example 8

		6/14/20 Jen is acquired by Tradeshow B	6/15/20 Michael is acquired by Tradeshow A	7/1/20 Opportunity 1 ($1,000) created	8/1/20 Opportunity 2 ($2,000) created	8/2/20 Michael and Jen associated with both opportunities	8/15/20 Opportunity 1 ($1,000) closed
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1	0.50	$500	0.50	$500
	Opportunity 2	0.50	$1,000	0.00	$0
Tradeshow B	Opportunity 1	0.50	$500	0.50	$500
	Opportunity 2	0.50	$1,000	0.00	$0

Multi Touch Exercises

Calculate the appropriate FT amounts given each scenario. All the information that you need resides in the FT and MT rules. After completing these exercises you will have a clear understanding of how Marketo calculates attribution.

Example 1

	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 ($1,000) created and Michael associated			
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				

Example 2

	7/1/12 Opportunity 1 ($1,000) created and Michael associated	7/2/12 Michael attends Webinar A			
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				

Example 3

	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 ($1,000) created and Michael associated	8/1/12 Opportunity 1 closed won		
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				

Example 4

	7/1/12 Opportunity 1 ($1,000) created and Michael associated	7/2/12 Michael attends Webinar A	8/1/12 Opportunity 1 closed won		
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				

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Multi Touch Exercises

Calculate the appropriate FT amounts given each scenario. All the information that you need resides in the FT and MT rules. After completing these exercises you will have a clear understanding of how Marketo calculates attribution.

Example 5

6/14/20 Michael downloads Whitepaper B

6/15/20 Michael attends Webinar A

7/1/20 Opportunity 1 ($1,000) created and Michael associated

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Example 6

6/14/20 Jen downloads Whitepaper B

6/15/20 Michael attends Webinar A

7/1/20 Opportunity 1 ($1,000) created and Michael associated

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Example 7

6/14/20 Jen downloads Whitepaper B

6/15/20 Michael attends Webinar A

7/1/20 Opportunity 1 ($1,000) created and Michael associated

7/2/20 Jen is associated to Opportunity 1

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Example 8

6/15/20 Michael attends Webinar A

7/1/20 Opportunity 1 ($1,000) created and Michael and Jen are associated

7/15/20 Jen downloads Whitepaper B

8/1/20 Opportunity 1 closed won

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Multi Touch Exercises

Calculate the appropriate FT amounts given each scenario. All the information that you need resides in the FT and MT rules. After completing these exercises you will have a clear understanding of how Marketo calculates attribution.

Example 9

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated	7/2/20 Jen is associated to Opportunity 1	8/1/20 Opportunity 1 closed won	
Program Name	**Opportunity Name**	**(MT) Opportunities Created**	**(MT) Pipeline Created**	**(MT) Opportunities Won**	**(MT) Revenue Won**
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Example 10

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated	8/1/20 Opportunity 1 closed won	8/2/20 Jen is associated to Opportunity 1	
Program Name	**Opportunity Name**	**(MT) Opportunities Created**	**(MT) Pipeline Created**	**(MT) Opportunities Won**	**(MT) Revenue Won**
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 1				

Example 11

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated	8/1/20 Opportunity 2 ($2,000) created and Jen associated		
Program Name	**Opportunity Name**	**(MT) Opportunities Created**	**(MT) Pipeline Created**	**(MT) Opportunities Won**	**(MT) Revenue Won**
Webinar A	Opportunity 1				
Whitepaper B	Opportunity 2				

Example 12

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created	8/1/20 Opportunity 2 ($2,000) created	8/2/20 Michael and Jen associated to both opportunities	8/15/20 Opportunity 1 ($1,000) closed
Program Name	**Opportunity Name**	**(MT) Opportunities Created**	**(MT) Pipeline Created**	**(MT) Opportunities Won**	**(MT) Revenue Won**
Webinar A	Opportunity 1				
	Opportunity 2				
Whitepaper B	Opportunity 1				
	Opportunity 2				

Multi Touch Answers

Example 1

		6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated		
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	1.00	$1,000	0.00	$0

Example 2

		7/1/20 Opportunity 1 ($1,000) created and Michael associated	7/2/20 Michael attends Webinar A		
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.00	$0	0.00	$0

Example 3

		6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated	8/1/20 Opportunity 1 closed won	
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	1.00	$1,000	1.00	$1,000

Example 4

		7/1/20 Opportunity 1 ($1,000) created and Michael associated	7/2/20 Michael attends Webinar A	8/1/20 Opportunity 1 closed won	
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.00	$0	1.00	$1,000

Multi Touch Answers

Example 5

6/14/20 Michael downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.50	$500	0.00	$0
Whitepaper B	Opportunity 1	0.50	$500	0.00	$0

Example 6

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	1.00	$1,000	0.00	$0
Whitepaper B	Opportunity 1	0.00	$0	0.00	$0

Example 7

6/14/20 Jen downloads Whitepaper B	6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael associated	7/2/20 Jen is associated to Opportunity 1

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.50	$500	0.00	$0
Whitepaper B	Opportunity 1	0.50	$500	0.00	$0

Example 8

6/15/20 Michael attends Webinar A	7/1/20 Opportunity 1 ($1,000) created and Michael and Jen are associated	7/15/20 Jen downloads Whitepaper B	8/1/20 Opportunity 1 closed won

Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	1.00	$1,000	0.50	$500
Whitepaper B	Opportunity 1	0.00	$0	0.50	$500

Multi Touch Answers

Example 9

| | | 7/1/20 Opportunity 1 ($1,000) created and Michael associated | | | |
| 6/14/20 Jen downloads Whitepaper B | 6/15/20 Michael attends Webinar A | | 7/2/20 Jen is associated to Opportunity 1 | 8/1/20 Opportunity 1 closed won | |
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.50	$500	0.50	$500
Whitepaper B	Opportunity 1	0.50	$500	0.50	$500

Example 10

| | | 7/1/20 Opportunity 1 ($1,000) created and Michael associated | | | |
| 6/14/20 Jen downloads Whitepaper B | 6/15/20 Michael attends Webinar A | | 8/1/20 Opportunity 1 closed won | 8/2/20 Jen is associated to Opportunity 1 | |
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.50	$500	0.50	$500
Whitepaper B	Opportunity 1	0.50	$500	0.50	$500

Example 11

| | | 7/1/20 Opportunity 1 ($1,000) created and Michael associated | 8/1/20 Opportunity 2 ($2,000) created and Jen associated | | |
| 6/14/20 Jen downloads Whitepaper B | 6/15/20 Michael attends Webinar A | | | | |
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	1.00	$1,000	0.00	$0
Whitepaper B	Opportunity 2	1.00	$2,000	0.00	$0

Example 12

| 6/14/20 Jen downloads Whitepaper B | 6/15/20 Michael attends Webinar A | 7/1/20 Opportunity 1 ($1,000) created | 8/1/20 Opportunity 2 ($2,000) created | 8/2/20 Michael and Jen associated to both opportunities | 8/15/20 Opportunity 1 ($1,000) closed |
Program Name	Opportunity Name	(MT) Opportunities Created	(MT) Pipeline Created	(MT) Opportunities Won	(MT) Revenue Won
Webinar A	Opportunity 1	0.50	$500	0.50	$500
	Opportunity 2	0.50	$1,000	0.00	$0
Whitepaper B	Opportunity 1	0.50	$500	0.50	$500
	Opportunity 2	0.50	$1,000	0.00	$0