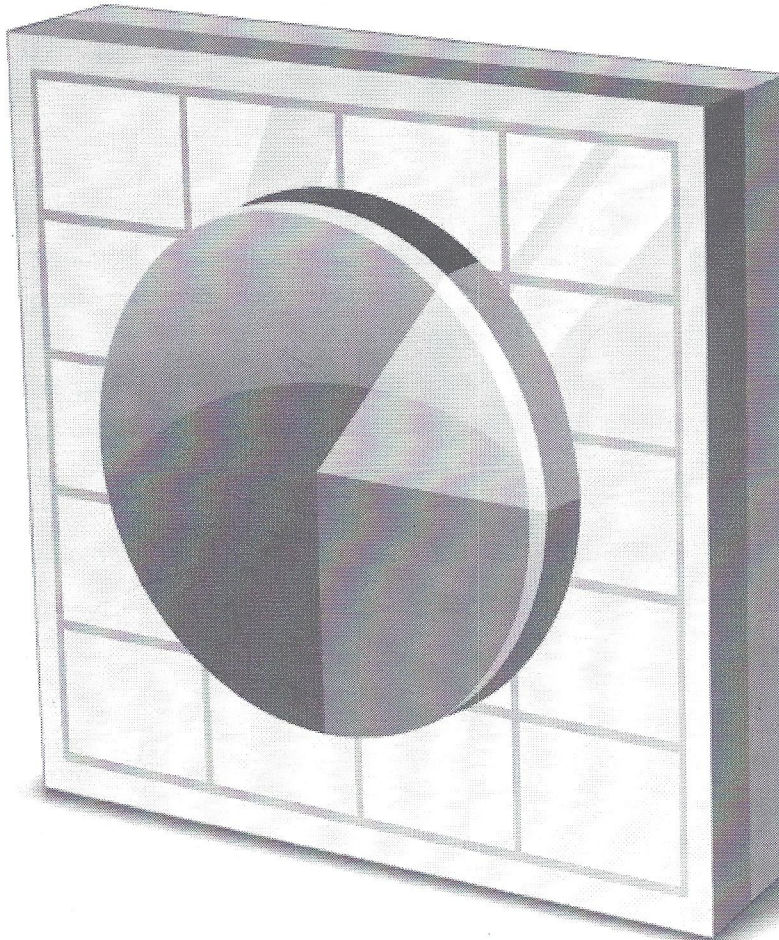




FIRST TOUCH & MULTI TOUCH ATTRIBUTION

Marketing needs to show how their marketing initiatives are tied to business results. Understanding how Marketo attributes pipeline and revenue to your programs is key to help 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 to continue to invest
- Which to discontinue/make changes

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 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 the 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):** Tracks touches that happen before Opportunity Close

Actionable Analytics

Business Question:
Which programs should I continue to invest?

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 working & create similar ones.

Figure 11.1: Actionable Analytics

Attribution Example

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

Each Program gets 50% of the credit for this opportunity

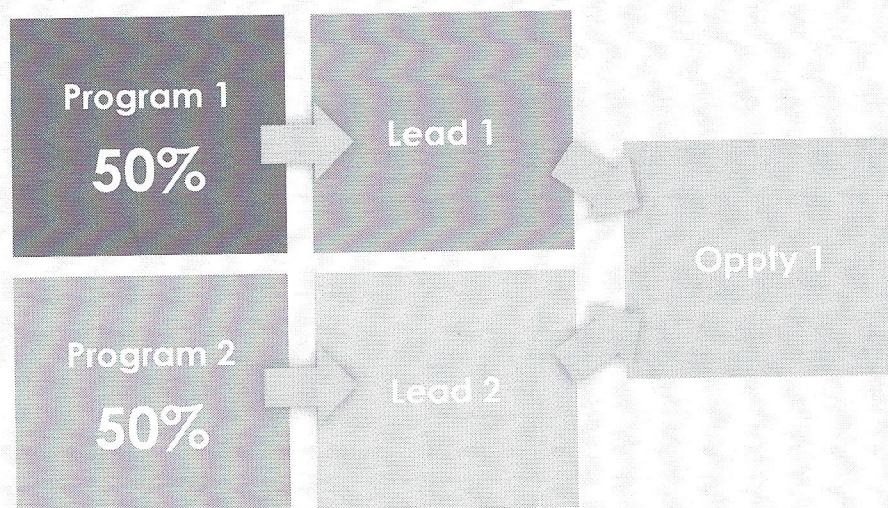


Figure 11.2: Attribution Example

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

Ex. 1

	6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated			
Program Name	Opportunity Name	(FT) Opportunities Created	(FT) Pipeline Created	(FT) Opportunities Won	(FT) Revenue Won
Tradeshow A	Opportunity 1				

Ex. 2

	6/15/12 Michael is acquired by Tradeshow A	6/25/12 Michael attends Webinar B	7/1/12 Opportunity 1 (\$1,000) 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				

Ex. 3

	6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated	7/25/12 Michael attends Webinar B	8/1/12 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				

Ex. 4

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

Ex. 5

	6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created	7/15/12 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				

Ex. 6

	7/1/12 Opportunity 1 (\$1,000) created	8/10/12 Michael is acquired by Tradeshow A	8/15/12 Opportunity 1 closed won	8/16/12 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				

Ex. 7

	7/1/12 Michael is acquired by Tradeshow A	7/15/12 Jen is acquired by Tradeshow B	8/1/12 Opportunity 1 (\$1,000) created	8/15/12 Michael and Jen are associated to 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				

Ex. 8

	6/14/12 Jen is acquired by Tradeshow B	6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created	8/1/12 Opportunity 2 (\$2,000) created	8/2/12 Michael and Jen associated to both opportunities	8/15/12 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

Ex. 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

6/15/12
 Michael is acquired by Tradeshow A

7/1/12
 Opportunity 1 (\$1,000) created and Michael associated

Ex. 2

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

6/15/12
 Michael is acquired by Tradeshow A

6/25/12
 Michael attends Webinar B

7/1/12
 Opportunity 1 (\$1,000) created and Michael associated

Ex. 3

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

6/15/12
 Michael is acquired by Tradeshow A

7/1/12
 Opportunity 1 (\$1,000) created and Michael associated

7/25/12
 Michael attends Webinar B

8/1/12
 Opportunity 1 closed won

Ex. 4

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

6/15/12
 Michael attends Webinar B

7/1/12
 Opportunity 1 (\$1,000) created and Michael associated

Ex. 5

		6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created	7/15/12 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	

Ex. 6

		7/1/12 Opportunity 1 (\$1,000) created	8/10/12 Michael is acquired by Tradeshow A	8/15/12 Opportunity 1 closed won	8/16/12 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	0.00	\$0	1.00	\$1,000		

Ex. 7

		7/1/12 Michael is acquired by Tradeshow A	7/15/12 Jen is acquired by Tradeshow B	8/1/12 Opportunity 1 (\$1,000) created	8/15/12 Michael and Jen are associated to 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		

Ex. 8

		6/14/12 Jen is acquired by Tradeshow B	6/15/12 Michael is acquired by Tradeshow A	7/1/12 Opportunity 1 (\$1,000) created	8/1/12 Opportunity 2 (\$2,000) created	8/2/12 Michael and Jen associated to both opportunities	8/15/12 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

Ex. 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				

Ex. 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				

Ex. 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				

Ex. 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				

Ex. 5

6/14/12	6/15/12	7/1/12			
Michael downloads Whitepaper B	Michael attends Webinar A	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				

Ex. 6

6/14/12	6/15/12	7/1/12			
Jen downloads Whitepaper B	Michael attends Webinar A	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				

Ex. 7

6/14/12	6/15/12	7/1/12	7/2/12		
Jen downloads Whitepaper B	Michael attends Webinar A	Opportunity 1 (\$1,000) created and Michael associated	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				

Ex. 8

6/15/12	7/1/12	7/15/12	8/1/12		
Michael attends Webinar A	Opportunity 1 (\$1,000) created and Michael and Jen are associated	Jen downloads Whitepaper B	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

Ex. 9

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated	7/2/12 Jen is associated to Opportunity 1	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				
Whitepaper B	Opportunity 1				

Ex. 10

6/14/12 Jen downloads Whitepaper B	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	8/2/12 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				

Ex. 11

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated	8/1/12 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				

Ex. 12

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created	8/1/12 Opportunity 2 (\$2,000) created	8/2/12 Michael and Jen associated to both opportunities	8/15/12 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				

Ex. 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	1.00	\$1,000	0.00	\$0

Ex. 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	0.00	\$0	0.00	\$0	

Ex. 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	1.00	\$1,000	1.00	\$1,000	

Ex. 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	0.00	\$0	1.00	\$1,000		

Multi Touch Answers

Ex. 5

6/14/12	6/15/12	7/1/12			
Michael downloads Whitepaper B	Michael attends Webinar A	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

Ex. 6

6/14/12	6/15/12	7/1/12			
Jen downloads Whitepaper B	Michael attends Webinar A	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

Ex. 7

6/14/12	6/15/12	7/1/12	7/2/12		
Jen downloads Whitepaper B	Michael attends Webinar A	Opportunity 1 (\$1,000) created and Michael associated	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

Ex. 8

6/15/12	7/1/12	7/15/12	8/1/12		
Michael attends Webinar A	Opportunity 1 (\$1,000) created and Michael and Jen are associated	Jen downloads Whitepaper B	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

Ex. 9

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated	7/2/12 Jen is associated to Opportunity 1	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	0.50	\$500	0.50	\$500
Whitepaper B	Opportunity 1	0.50	\$500	0.50	\$500

Ex. 10

6/14/12 Jen downloads Whitepaper B	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	8/2/12 Jen is associated to Opportunity 2	
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

Ex. 11

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created and Michael associated	8/1/12 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	1.00	\$1,000	0.00	\$0
Whitepaper B	Opportunity 2	1.00	\$2,000	0.00	\$0

Ex. 12

6/14/12 Jen downloads Whitepaper B	6/15/12 Michael attends Webinar A	7/1/12 Opportunity 1 (\$1,000) created	8/1/12 Opportunity 2 (\$2,000) created	8/2/12 Michael and Jen associated to both opportunities	8/15/12 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

Blank lined page for writing.