Personalize Multi-Touch Attribution Dashboards with Ease

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Agenda

- B2BMA and B2BMA Plus, prerequisites and permissions.
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- Demo Time. Modify default B2BMA data flow in Analytics Studio.
- Customize the B2BMA dashboards adding new components: filters, tables and charts.

B2B Marketing Analytics (B2BMA)

Reporting in MCAE

MCAE reports

MCAE data

SFDC reports

Salesforce data

B2BMA

Both MCAE and Salesforce Data

B2B Marketing Analytics (B2BMA)

- Engagement
- Pipeline
- Marketing Manager
- **Multi-Touch Attribution**
- **Account-Based Marketing**
- **Einstein Behaviour Scoring**

Optional Dashboards
(need additional set-up)

Prerequisites for B2BMA

Permission Set Licenses

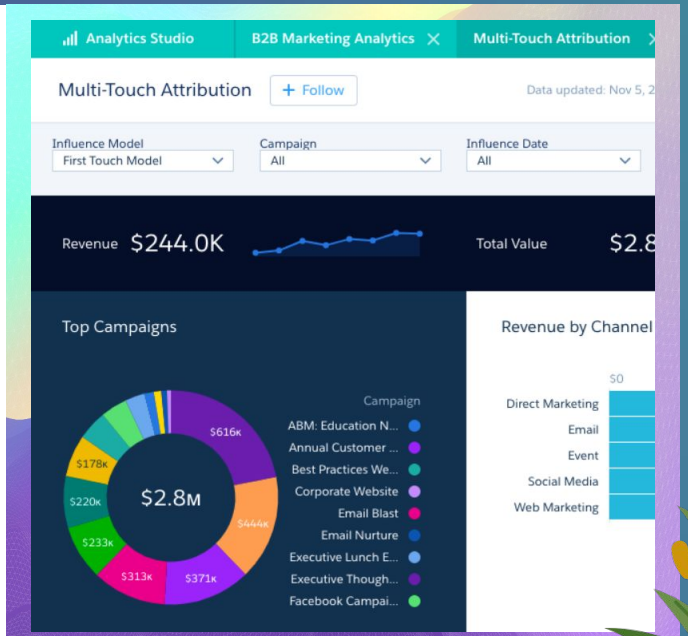
- B2B Marketing Analytics
- Account Engagement or CRM User or Sales User or Service User

Permission Sets

- Account Engagement or CRM User or Sales User or Service User
- B2B Marketing Analytics App

Multi Touch Attribution Dashboard

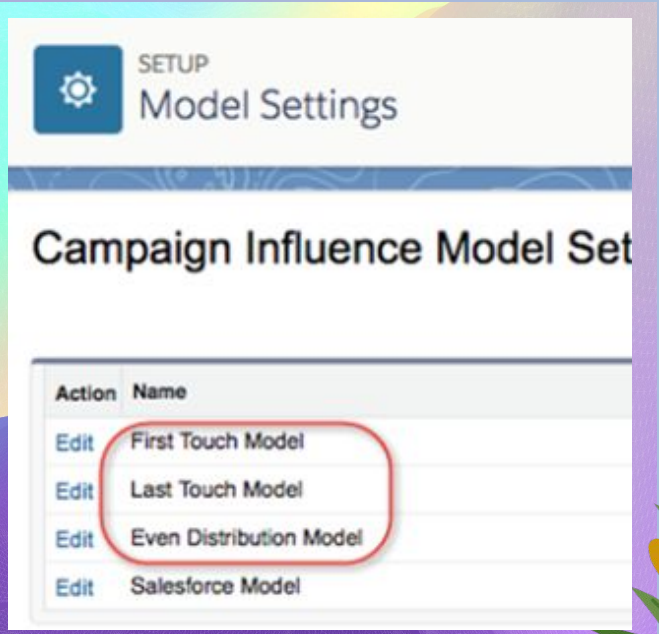
- Enable Customizable Campaign influence
- Enable Additional Campaign Influence models



Customizable Campaign Influence and Data models

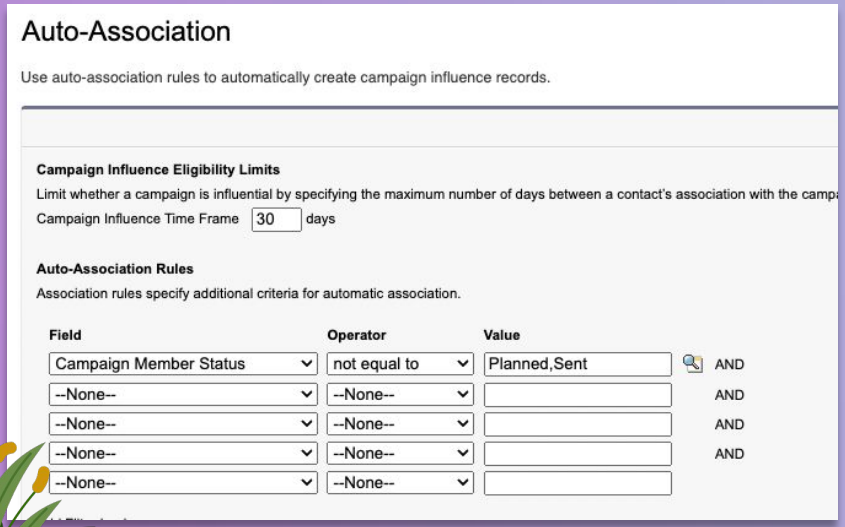
Customizable Campaign Influence

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes.



Auto-Association Settings

Customizable Campaign Influence models use auto-association to create campaign influence records based on the criteria you set.



- Criteria can include time frame and campaign types, and you can add other filters using standard fields.
- Default and custom models can use auto-association rules based on both standard and custom fields.

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Models

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes.

Primary Campaign Source Model

Assigns 100% influence to the campaign noted in the Primary Campaign Source field on an opportunity. Uses Auto-Association settings.

Custom Models

Users manually add or edit an influence percentage in the Campaign Influence related list on an opportunity record.

MCAE Models

First Touch

Assigns 100% of influence and revenue earned to the first campaign a prospect touches.

Last Touch

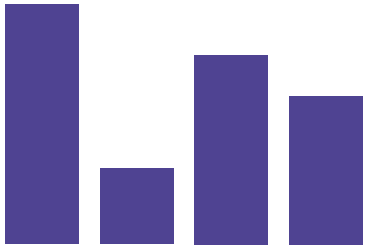
Assigns 100% of influence and revenue earned to the last campaign a prospect touches before a deal is closed.

Even Distribution

Assigns an equal percentage of influence and revenue earned to every campaign a prospect touches.

For these models Auto-Association settings apply only for default fields!

MCAE Models



Data Driven

Einstein Attribution combines Campaign Influence with Einstein's intelligent analysis to more accurately assign campaign attribution.

- You can set campaign Influence Time Frame and success milestone in set-up.
- You can set Data-Driven Model as a default model.
- Touchpoints include tracked engagement activities on an Account Engagement prospect or a Sales Cloud campaign member.
- Only campaign members whose status is Responded are included in the model.
- **Auto-association settings do not count for this model.**

Demo Time

Create B2BMA App

1. Navigate to Analytics Studio.
2. Click on “Create”, choose create an App.
3. Select B2B Marketing Analytics template and press to continue.
4. Find Pardot Account ID in MCAE settings.
5. Choose the dashboards to create.
6. Select your locale settings! Important, the currency for the dashboards depends on this settings.
7. Name your App and click “create”.

What is created

DATASETS

A dataset is a collection of source data that the B2B Marketing Analytics app formats and optimizes for your interactive exploration.

LENSES

A lens is a particular view of a chosen dataset.

DASHBOARDS

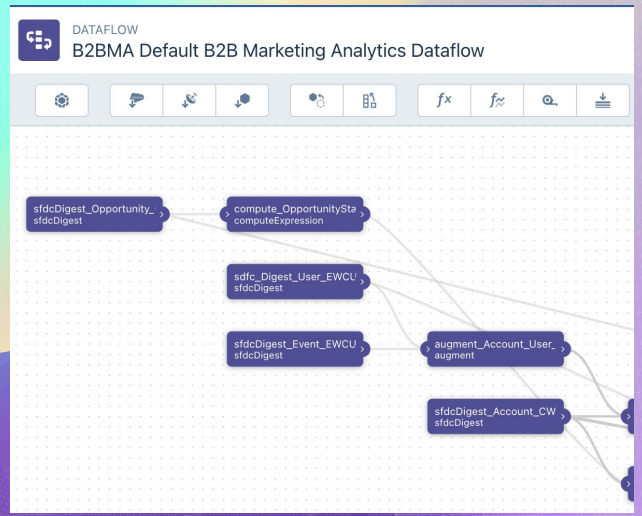
A dashboard is a curated set of charts, metrics, and tables based on the data in one or more lenses.

Changing a Dataset

Multi Touch attribution dashboard uses a default Dataset created from a Dataflow.

To get more data you can either:

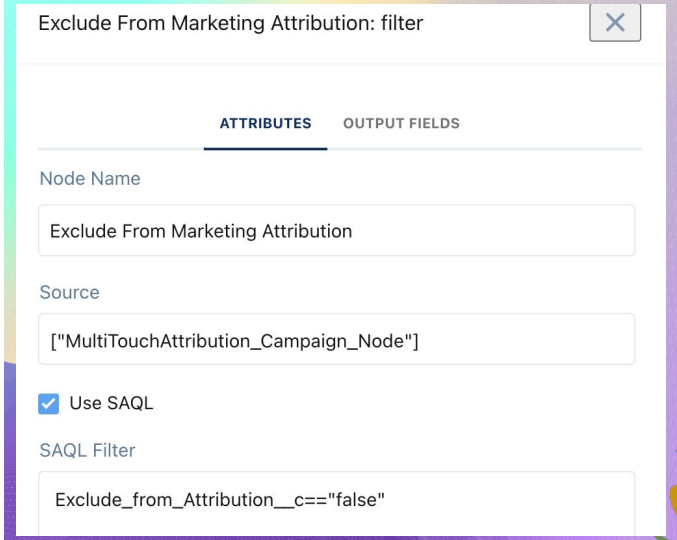
1. Modify the Default dataflow, augmenting data, adding filters.
2. Create a new Dataset from scratch (use a recipe). In this case you will need to change the dataset in every component of the dashboard.



Changing a dataflow

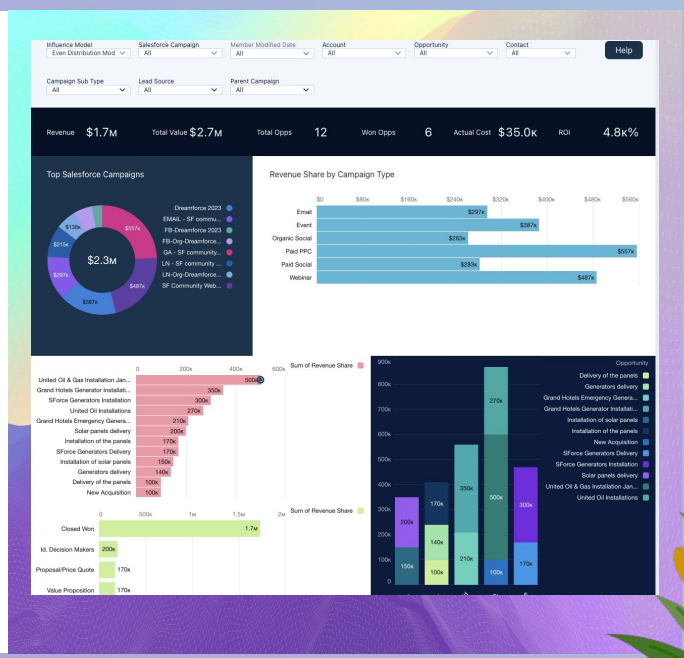
Navigate directly to the dataflow and start making changes:

1. Add new fields to the objects (subtype, exclude from attribution, parent campaign)
2. Add a filter element (exclude from marketing attribution)
3. Add new SF object (campaign for parent campaign)
4. New augment element (augment parent campaign)



Changing the Dashboard

1. Duplicate the original dashboard.
2. Create filters for Campaign Subtype, Parent Campaign and Lead source.
3. Add element of Total Opportunities and Total Won Opportunities.
4. Add a chart component
5. Add a table



Thank You!