

# Personalize Multi-Touch Attribution Dashboards with Ease

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# MARDREAMIN'

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WELCOME TO

**MARDREAMIN'** 

• 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

II Analytics Studio	B2B Marketing Analytics 🗙	Multi-Touch Attribu	tion
Multi-Touch Attributi	on + Follow	Data updated	: No
Influence Model First Touch Model V	Campaign All V	Influence Date All	~
Revenue \$244.0K		Total Value	\$2
Top Campaigns		Revenue by C	har
5179x 5220x \$2.8M 5233x 5313x 5371x	ABM: Education N • Annual Customer • Best Practices We • Corporte Website • Email Blast • Email Nurture • Executive Lunch E • Executive Though • Facebook Campai •	Direct Marketing Email Event Social Media Web Marketing	50

# 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.

se auto-association rules to automa	tically create campaig	n influen	ce records.	
Campaign Influence Eligibility Limit	5			
Limit whether a campaign is influential	by specifying the maxin	num numl	ber of days between a co	ntact's association with the o
Campaign Influence Time Frame 30	days			
Auto-Association Rules				
Auto-Association Rules Association rules specify additional cri	teria for automatic asso	ciation.		
	teria for automatic asso	ciation.	Value	
Association rules specify additional cri			Value Planned,Sent	🕙 AND
Association rules specify additional cri	Operator			AND AND
Association rules specify additional cri Field Campaign Member Status	Operator	~		
Association rules specify additional cri Field Campaign Member Status None	Operator Inot equal to Inot equal to	<b>~</b>		AND

- 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.



## 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.
  - 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)

Exclude From Marketing Attribution: filter
ATTRIBUTES OUTPUT FIELDS
Node Name
Exclude From Marketing Attribution
Source
["MultiTouchAttribution_Campaign_Node"]
Vse SAQL
SAQL Filter
Exclude_from_Attributionc=="false"



# **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!**