



Scrappy Attribution for SMB Marketing Teams



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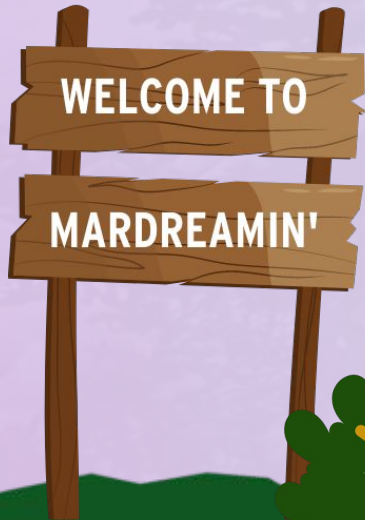
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Agenda

- Introduction
- Preparing your team
- Telling the attribution story
- Low-Cost approaches to calculating influence
- What's next?



Attribution at a glance

- Identify touchpoints for pipeline and revenue insights
- Allocate resources efficiently
- Optimize strategies by understanding customer journey impact
- Gain insights to maximize marketing impact



Use Case: GadgetHaven

- Small B2B ecommerce startup
- Marketing flying blind
- Simple and straightforward attribution story that drove them to reallocate 90% of their digital marketing budget



Preparing Your Team



Cultivating an Attribution Mindset

- Encourage curiosity
- Education and training
- Emphasize collaboration and address concerns proactively
- Data accessibility and self-service functionality (when possible)
- Showcase success stories!



Avoiding Internal Blow-Ups

- Frame attribution as a marketing decision-making tool
- Do not use attribution as a tool to divvy up “credit” for pipeline or revenue between sales and marketing
- Create talking points for executives to position themselves for success when presenting findings across leadership/the board

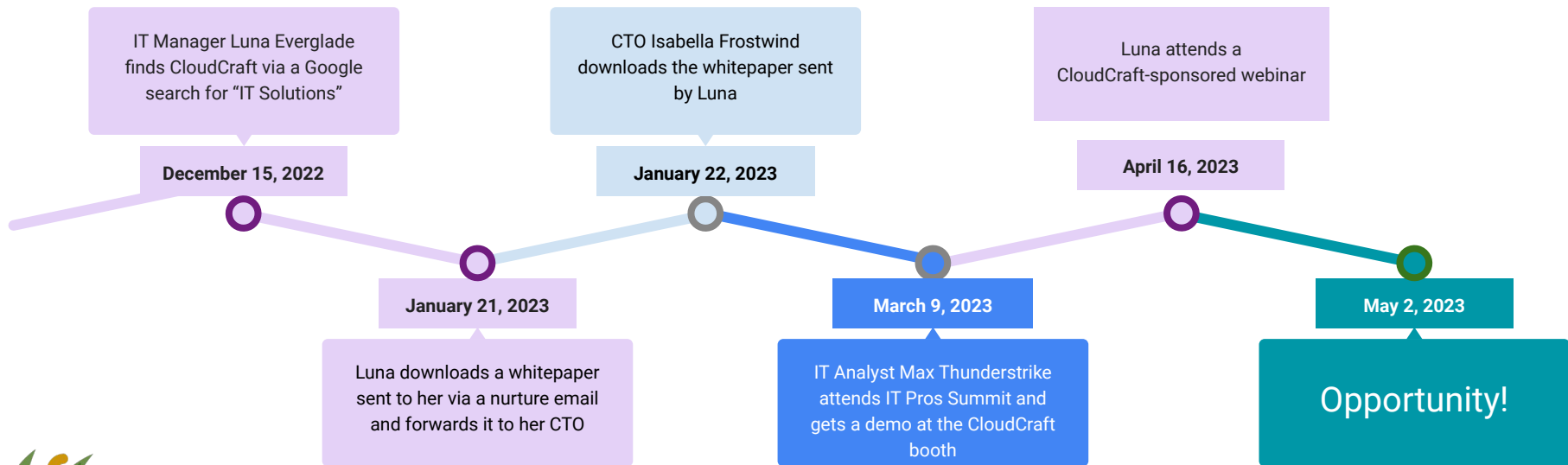


Telling the Attribution Story



CloudCraft

B2B SaaS company that traditionally sells into IT teams



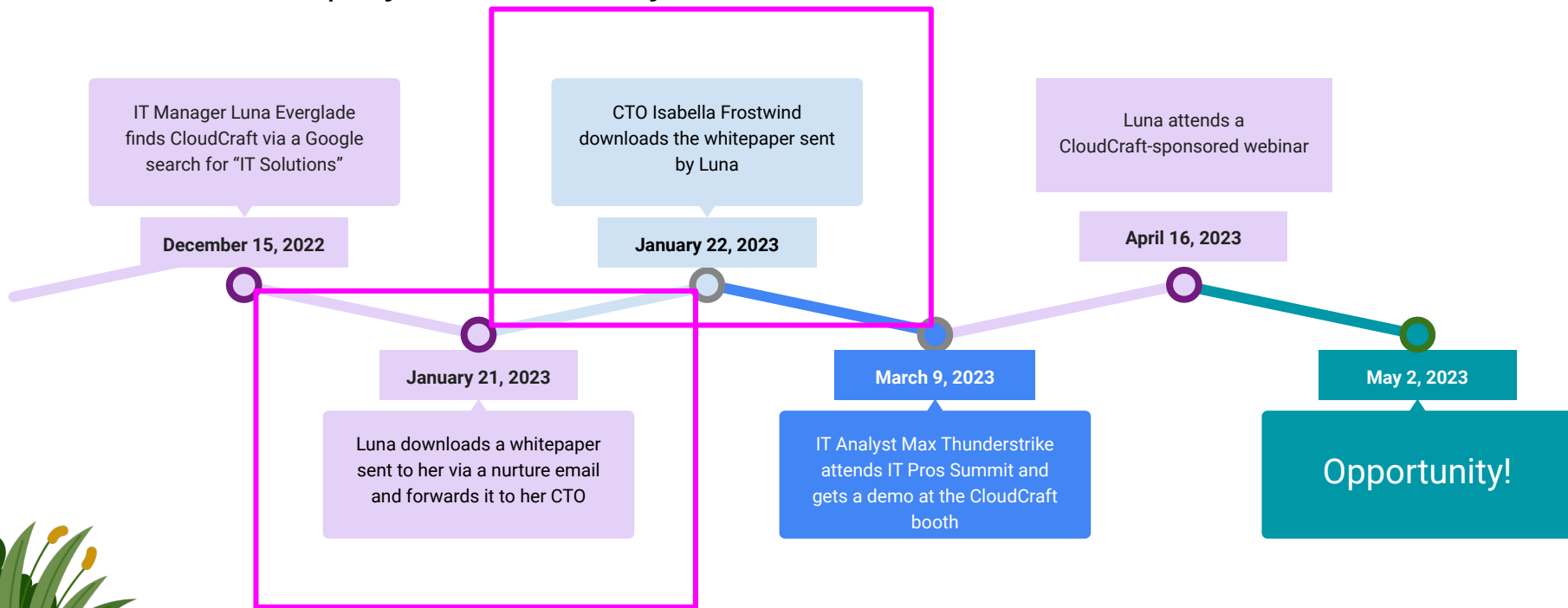
Types of Attribution Models

- Let's start with the basics:
- First Touch (Lead Source)*
- Last Touch
- Multi-Touch
- Time decay
- There are so many models!



CloudCraft

B2B SaaS company that traditionally sells into IT teams



Basic Multi-Touch Attribution

- Identify touchpoints
 - Often correlates to campaigns / responses
 - Data points may include Person ID, Company ID, Opportunity ID, date of touchpoint, touchpoint source or channel, campaign name, and total opportunity value
- Assign weights if you want to get fancy. In this case, all touchpoints are weighed equally.
- Calculate scores for each customer journey individually.
 - CloudCraft has 5 touchpoints for a \$100k opportunity, each touchpoint gets $\frac{1}{5}$ credit for the opportunity, at a dollar value of \$20k each.
- Add it up!



The background features a soft-focus illustration of mountains in shades of blue and purple. On the right side, a hand is shown holding a pen, with a faint outline of a document or chart. In the bottom-left corner, there is a small cluster of green plants with yellow flowers.

Low-Cost Approaches to Calculating Influence

Basic Multi-Touch Attribution in Spreadsheets

Here's what that last slide looks like in a Spreadsheet.

Identifying Touchpoints

>>

Person	Company	Date	Campaign Type	Campaign Name	Total Opp Amount
Maxine Silverstone	Quantum Innovations	7/27/23	Email	EM-2023-07 Email	\$320,000
Felix Davenport	Stellar Solutions	9/6/23	Web	WC-2023-InterlProduct Review (2021 Report)	\$180,000
Isabella Thornfield	Nebula Dynamics	7/27/23	Email	EM-2023-07 Email	\$470,000
Jasper Montgomery	SynthWave Technologies	7/27/23	Email	EM-2023-07 Email	\$230,000
Penelope Kensington	Zenith Enterprises	10/19/23	Web	2023-Request Demo	\$380,000
Oliver Blackwood	Galactic Innovators	10/19/23	Web	2023-Request Demo	\$450,000
Seraphina Westfield	Alpha Matrix Systems	7/27/23	Email	EM-2023-07 Email	\$140,000
Atticus Rainier	Quantum Sphere Solutions	7/27/23	Email	EM-2023-07 Email	\$420,000
Elowen Stirling	Future Nexus Labs	7/27/23	Email	EM-2023-07 Email	\$260,000
Sebastian Lockhart	Infinity Innovations	7/27/23	Email	EM-2023-07 Email	\$330,000
Arabella Sinclair	Pinnacle Dynamics	1/26/24	Web	2023-High-Intent Download	\$170,000
Gideon Havisham	TechNova Ventures	1/23/24	Web	2023-ContactUs Request	\$290,000
Rowan Evergreen	SynthCorp Industries	1/17/24	Web	2023-Request Demo	\$120,000
Celeste Nightingale	Quantum Nexus Technologies	1/30/24	Web	2023-Request Demo	\$460,000
Nathaniel Hawthorne	Nebula Innovations	1/19/24	Web	2023-High-Intent Download	\$190,000
Amara Phoenix	Zenith Dynamics	12/21/23	Email	EM-2023-12-22 Email December	\$360,000
Casimir Sterling	Stellar Nexus Solutions	1/1/24	Email	EM-2023-12-22 Email December	\$500,000
Genevieve Winters	Future Matrix Labs	12/21/23	Email	EM-2023-12-22 Email December	\$200,000
Lucius Ravenscroft	Alpha Dynamics Ventures	12/21/23	Email	EM-2023-12-22 Email December	\$210,000
Octavia Winslow	Quantum Innovators	12/21/23	Email	EM-2023-12-22 Email December	\$310,000
Magnus Beaumont	Nebula Sphere Technologies	12/21/23	Email	EM-2023-12-22 Email December	\$400,000
Lavinia Fairchild	Galactic Innovations	12/21/23	Email	EM-2023-12-22 Email December	\$130,000

Basic Multi-Touch Attribution in Spreadsheets

Here's what that last slide looks like in a Spreadsheet.

Calculating Scores >>

$fx = F2 / \text{countif}(B:B, B2)$

↑ Total Opp Amount
 ↘ Number of touchpoints for this company

Person	Company	Date	Channel	Event	Value	Score
Maxine	SynthWave Technologies	7/27/23	Email	EM-2023-07 Email	\$230,000	\$32,857
Felix D	Zenith Enterprises	10/19/23	Web	2023-Request Demo	\$380,000	\$54,286
Isabella	Galactic Innovators	10/19/23	Web	2023-Request Demo	\$450,000	\$5,233
Jasper Montgomery	Alpha Matrix Systems	7/27/23	Email	EM-2023-07 Email	\$140,000	\$20,000
Penelope Kensington	Quantum Sphere Solutions	7/27/23	Email	EM-2023-07 Email	\$420,000	\$12,353
Oliver Blackwood	Future Nexus Labs	7/27/23	Email	EM-2023-07 Email	\$260,000	\$7,879
Seraphina Westfield	Infinity Innovations	7/27/23	Email	EM-2023-07 Email	\$330,000	\$47,143
Atticus Rainier	Pinnacle Dynamics	1/26/24	Web	2023-High-Intent Download	\$170,000	\$2,152
Elowen Stirling	TechNova Ventures	1/23/24	Web	2023-ContactUs Request	\$290,000	\$6,170
Sebastian Lockhart	SynthCorp Industries	1/17/24	Web	2023-Request Demo	\$120,000	\$6,000
Arabella Sinclair	Quantum Nexus Technologies	1/30/24	Web	2023-Request Demo	\$460,000	\$23,000
Gideon Havisham	Nebula Innovations	1/19/24	Web	2023-High-Intent Download	\$190,000	\$1,696
Rowan Evergreen	Zenith Dynamics	12/21/23	Email	EM-2023-12-22 Email December	\$360,000	\$7,660
Celeste Nightingale	Stellar Nexus Solutions	1/1/24	Email	EM-2023-12-22 Email December	\$500,000	\$25,000
Nathaniel Hawthorne	Future Matrix Labs	12/21/23	Email	EM-2023-12-22 Email December	\$200,000	\$5,000
Amara Phoenix	Alpha Dynamics Ventures	12/21/23	Email	EM-2023-12-22 Email December	\$210,000	\$4,565
Casimir Stirling	Quantum Innovators	12/21/23	Email	EM-2023-12-22 Email December	\$310,000	\$9,118
Genevieve Winters	Nebula Sphere Technologies	12/21/23	Email	EM-2023-12-22 Email December	\$400,000	\$12,121
Lucius Ravenscroft	Galactic Innovations	12/21/23	Email	EM-2023-12-22 Email December	\$130,000	\$2,766
Octavia Winslow	SynthWave Enterprises	12/21/23	Email	EM-2023-12-22 Email December	\$410,000	\$20,500
Magnus Beaumont	Zenith Innovators	12/21/23	Email	EM-2023-12-22 Email December	\$300,000	\$11,111

Basic Multi-Touch Attribution in Spreadsheets

Here's what that last slide looks like in a Spreadsheet.

Add it up! >>

Iterate and refine.

Campaign Type	SUM of Opp Amount Attributed
Email	\$12,269,162
Event	\$747,249
Other	\$10,000
Web	\$1,444,483
Webinar	\$1,494,467

Campaign Name	SUM of Opp Amount Attributed
EM-2023-11-30 Email November	\$3,247,674
EM-2023-02-February Email	\$1,124,059
2023-Request Demo	\$693,875
EM-2023-06 Email	\$678,967
PE-2023-04-25 Top 5 Lunch-and-learn	\$326,766
EM-2023-01-25-Big Picture	\$292,919
WBN-2023-02 PlatformEpsilon	\$285,858
WBN-2023-06-AXY PIM FORUM	\$277,046
WBN-2023-04 Community	\$264,776
WBN-2023-01-19 Partner webinar	\$250,125
2023-High-Intent Download	\$249,532
WF-2023-Community Online Signup	\$177,601

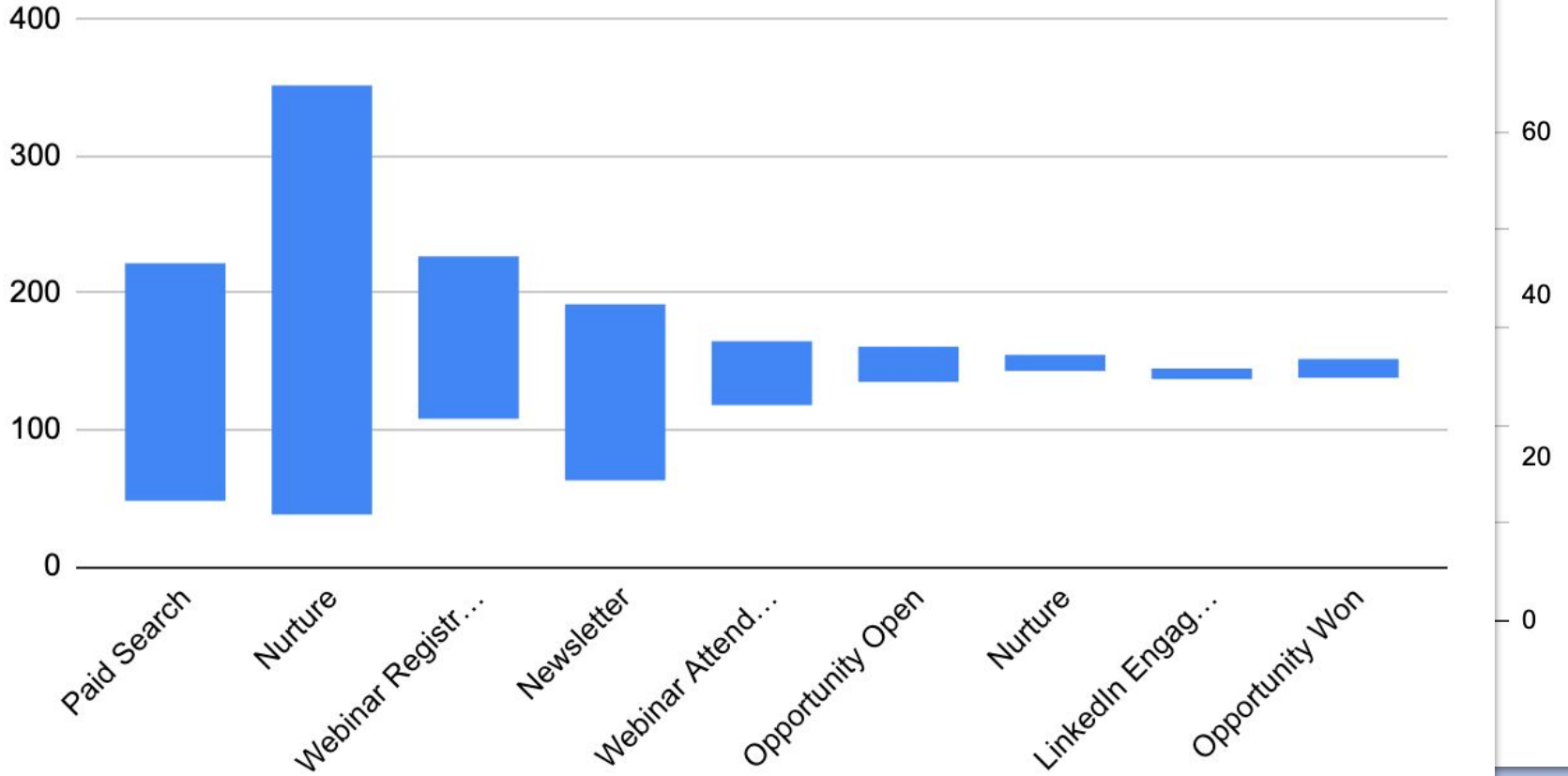
Telling a Story

- Analyze results
- Share visualizations to inspire action
- Be prepared to address nuances (e.g. 3 **very** large deals influenced by top 2 emails)



Campaign Name	SUM of Opp Amount Attributed
EM-2023-11-30 Email November	\$3,247,674
EM-2023-02-February Email	\$1,124,059
2023-Request Demo	\$693,875
EM-2023-06 Email	\$678,967
PE-2023-04-25 Top 5 Lunch-and-learn	\$326,766
EM-2023-01-25-Big Picture	\$292,919
WBN-2023-02 PlatformEpsilon	\$285,858
WBN-2023-06-AXY PIM FORUM	\$277,046
WBN-2023-04 Community	\$264,776
WBN-2023-01-19 Partner webinar	\$250,125
2023-High-Intent Download	\$249,532
WF-2023-Community Online Signup	\$177,601

Buyer Journey by Influence



Use Case: GadgetHaven

- Started simple:
 - Basic MT attribution model
 - Tracked organic and paid digital efforts, emails, events, and webinars
- Made two big discoveries:
 - Over 70% of their new opportunities had at least one event engagement at some point
 - They were spending thousands of dollars each month on paid digital ads that led to almost zero in actual revenue
- Moved 90% of their digital budget to events
- Increased marketing ROI by 45% with no additional budget



What's next?



Free & Inexpensive Tools

Free:

- Looker (Google Data Studio)
- PowerBI

Attribution tools with transparent pricing:

- HockeyStack
- Octane11
- Align.ly
- Ruler Analytics



Resources

- HubSpot Academy
- Adobe Blog
- Kissmetrics Blog
- Moz Blog
- Nielsen Marketing Cloud content
- Reddit fans?
 - [r/analytics](#)
 - [r/marketing](#)



Summary

- **Start simple:** Attribution doesn't need to be perfect to provide valuable insights. Focus on actionable data rather than complex models.
- **Maximize Available Tools:** Leverage what you have. Use existing platforms and reporting tools to track key touchpoints without overcomplicating.
- **Get everyone on board!** With the right stakeholders and enthusiasm, adoption is just around the corner.



Thank You!

Questions?

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