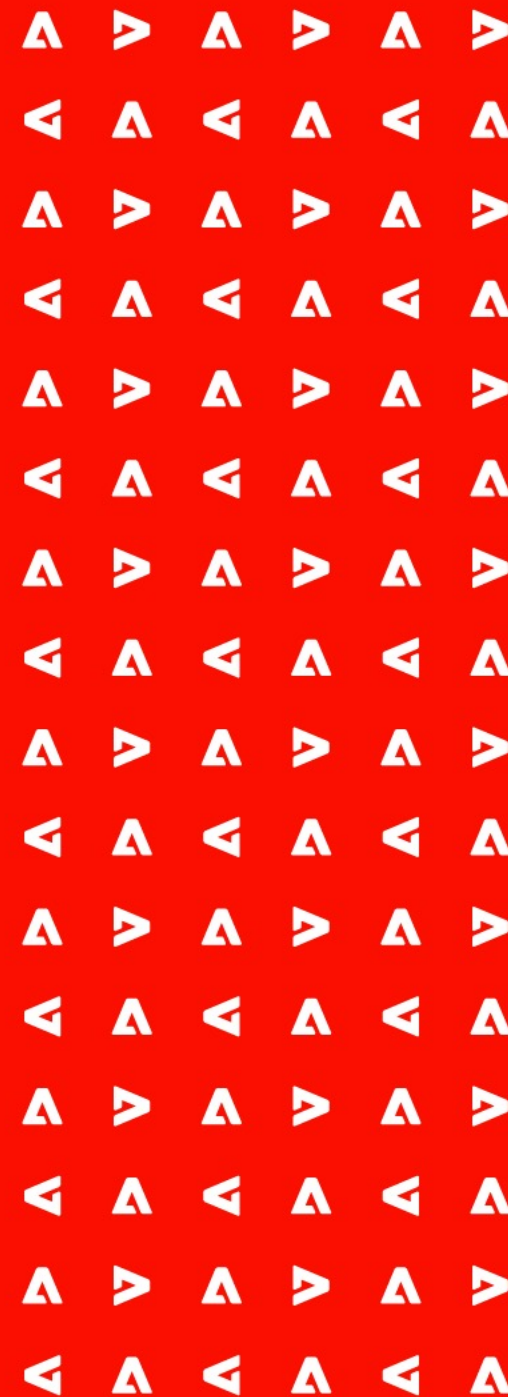




# The A-Z of Bizible Attribution Models

**Kate Colbert**

Business Consultant | Adobe



# Featured Speaker

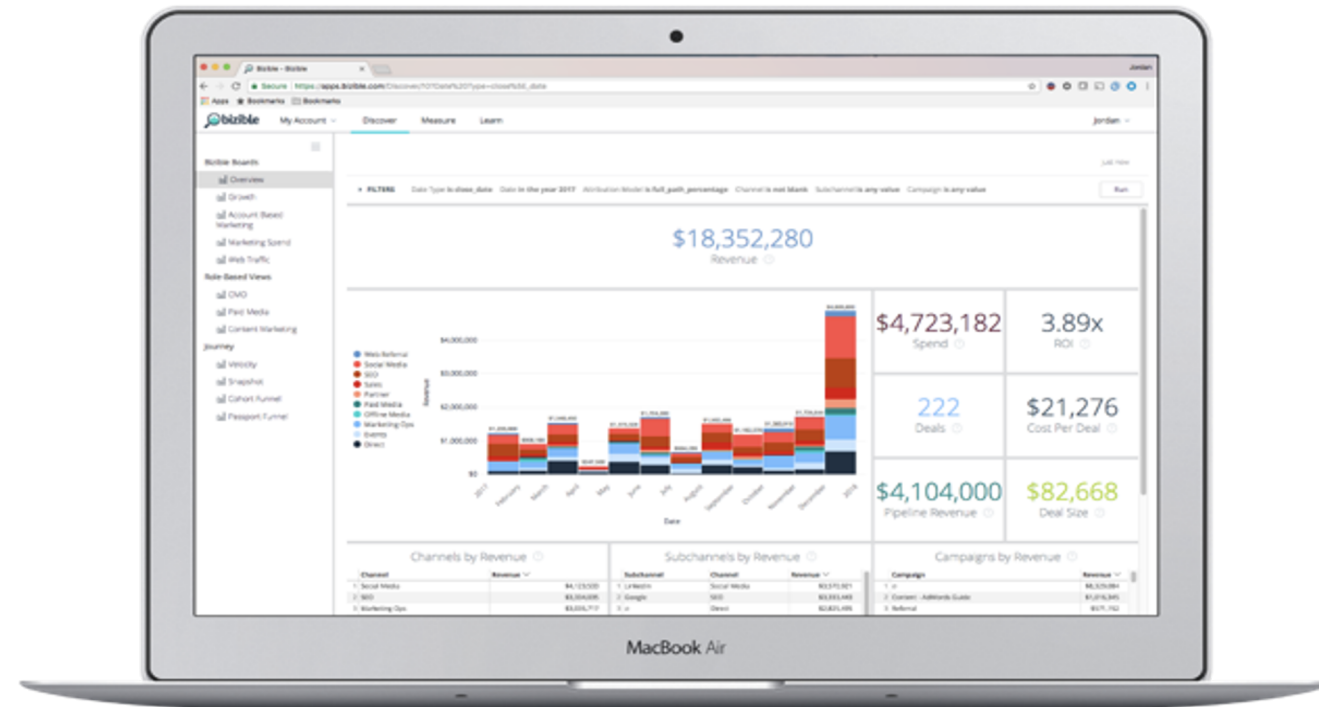


Kate Colbert  
Business Consultant, Bizible &  
Marketo Engage

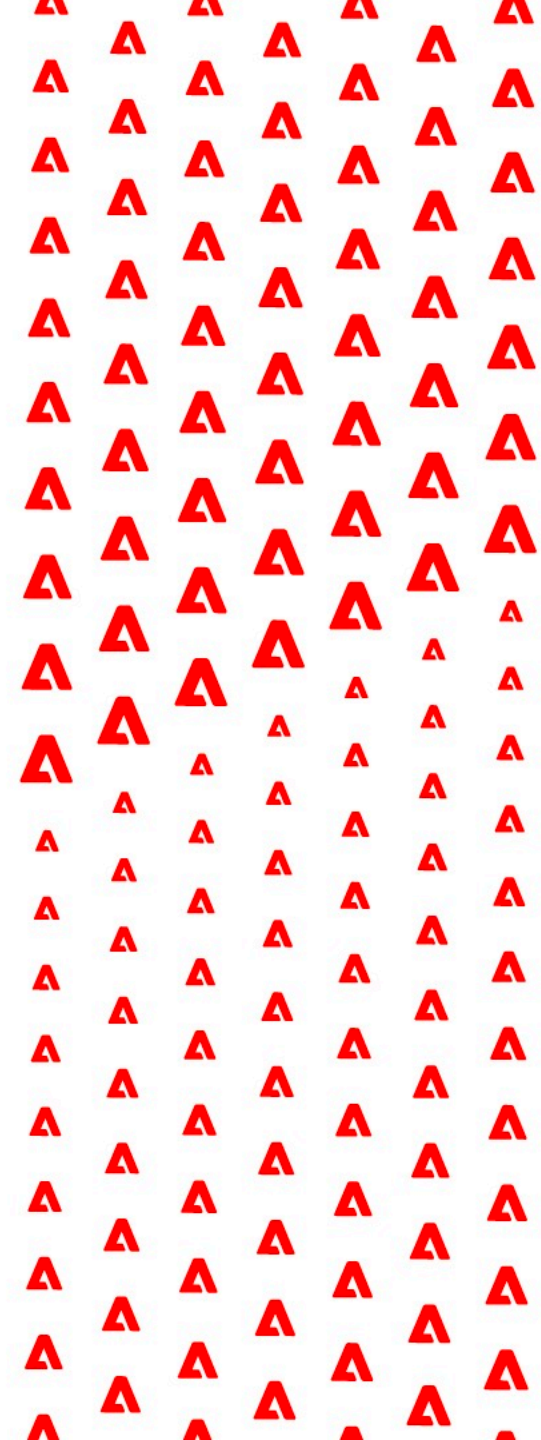
Kate is a Business Consultant delivering & consulting on both Marketo Engage and Bizible projects. With Bizible specifically, she serves as a Subject Matter Expert and has onboarded over 100 Bizible clients the past 4 years.

# Agenda

- Introduction
- Defining an "Attribution Model"
- Bizible Stock Attribution Models
- Bizible Custom Model
- Tips
- Recap
- Q&A



# Defining an “Attribution Model”



# “Attribution Models” split credit across the sales cycle

- Within Bizible, an **Attribution Model** is the way that credit is assigned to the Touchpoint records
- All Models start with 100% credit and then split the credit differently

Stage Name	First Touch	Lead Creation	U-Shaped	W-Shaped	Full Path
First Touch (FT)	100.0%	0.0%	40.0%	30.0%	22.5%
Lead Creation (LC)	0.0%	100.0%	40.0%	30.0%	22.5%
Opportunity Creation (OC)	0.0%	0.0%	0.0%	30.0%	22.5%
Closed (Lost, Won)	0.0%	0.0%	0.0%	0.0%	22.5%
Middle Touches	0.0%	0.0%	20.0%	10.0%	10.0%

## Let's take a quick example...

Riah is in the market for a Moped Scooter. . .



1. Riah [searches organically on Google](#) to see options. She finds a company, Magical Mopeds, and clicks through to the site to learn more but doesn't fill out a form or purchase

# Let's take a quick example...



Riah is in the market for a Moped Scooter. . .

1. Riah **searches organically on Google** to see options. She finds a company, Magical Mopeds, and clicks through to the site to learn more but doesn't fill out a form or purchase
2. A few days later, Riah is still researching and **sees a Paid Search ad** for Magical Mopeds and then **fills out a form** to access a guide for selecting the best Moped type



## Let's take a quick example...



Riah is in the market for a Moped Scooter. . .

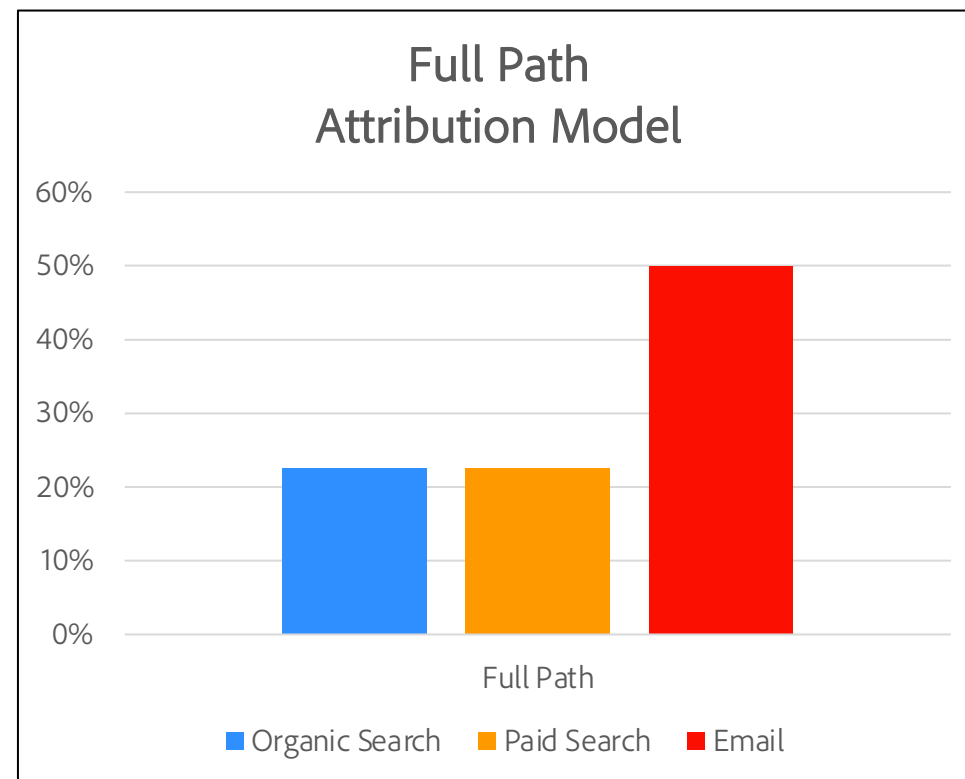
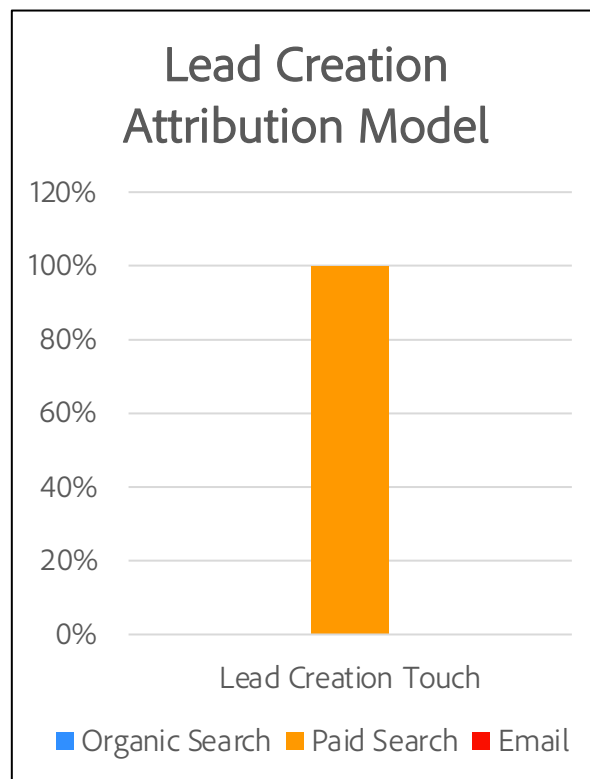
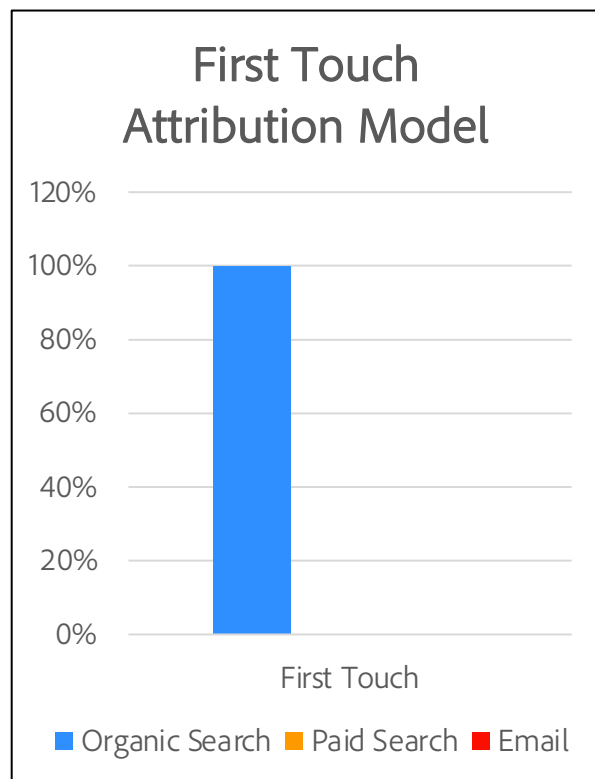
1. Riah **searches organically on Google** to see options. She finds a company, Magical Mopeds, and clicks through to the site to learn more but doesn't fill out a form or purchase
2. A few days later, Riah is still researching and **sees a Paid Search ad** for Magical Mopeds and then **fills out a form** to access a guide for selecting the best Moped type
3. A week later, Riah **receives an email** from Magical Mopeds and **clicks through to the website to make a purchase**



**Organic Search** → Website Visit

**Paid Search** → Form Fill

**Email** → Purchase



# Leveraging the Best Attribution Model per your Marketing Strategy

- It depends on your Marketing strategy and initiatives, as well as what you are trying to solve for
  - Think about your current KPIs, reporting strategy, business model, etc.
- There isn't one "right" answer
- Usually, multiple models will be leveraged

# Types of Models

## Single Touch/Linear Models

- First Touch
- Lead Creation

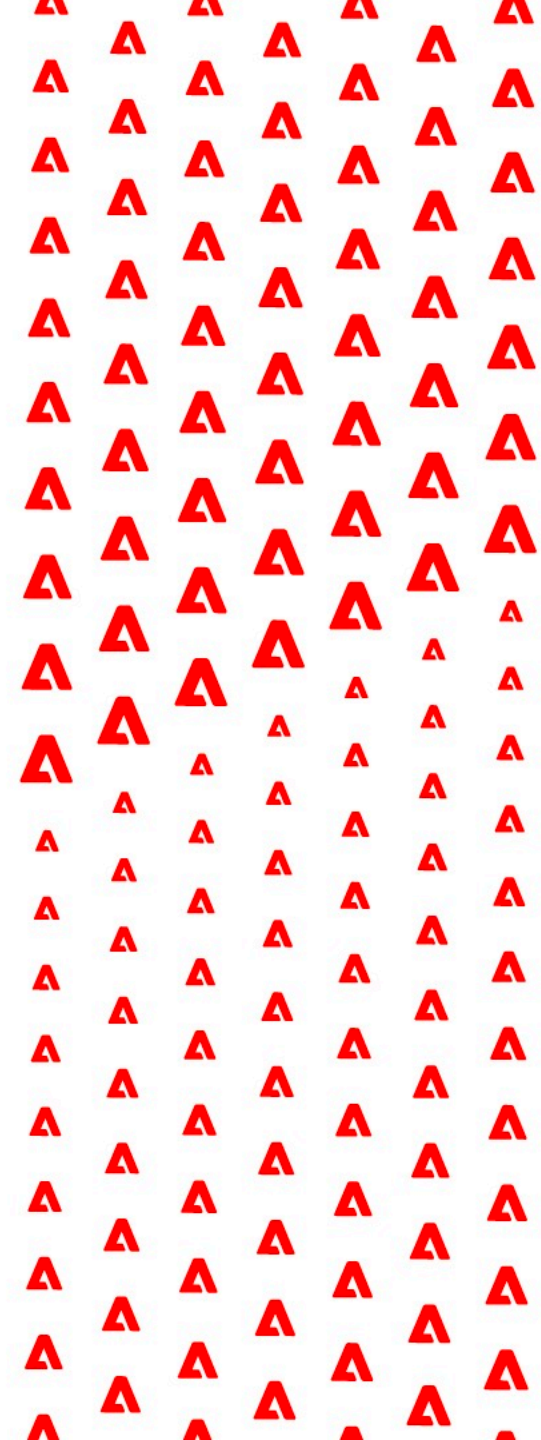
## Multi-Touch Models

- U-Shaped
- W-Shaped
- Full Path

## Custom Model

- Can be configured to be single-touch or multi-touch

# Bizable Stock Attribution Models



# First Touch (FT) Attribution



Attribute to Evaluate	Details
Model Type	Single Touch Model – 100% of credit to one touchpoint
Credit Allocation	First touch point, regardless of whether that marketing campaign directly influenced the sale or not (It could be an Anonymous First Touch or FT and LC combined)
Best Use Case	You're trying to discover the methods and strategies that drive the most <b>net new interaction</b>

## Example #1 from SFDC

Full Name	Email	Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Type	Touchpoint Date ↑	Count - First Touch	Count - Lead Creation Touch	Count - U-Shaped
Lead ID: 00Q31000017G4Zi (3 records)									1.00	1.00	1.00
Connie [REDACTED]	connie.[REDACTED]@ [REDACTED]	<u>a6X3r0000000xl8</u>	Social	linkedin	SU - CMO JT	FT, LC, Form	Web Form	1/3/2016 11:58 PM	1.00	1.00	1.00
Connie [REDACTED]	connie.[REDACTED]@ [REDACTED]	<u>a6X3r0000000xl6</u>	Social	LinkedIn	SU - ABM Accounts - Mktg JF	Demo Scheduled-01 (Last), PostLC, Form	Web Form	8/28/2016 12:24 PM	0.00	0.00	0.00
Connie [REDACTED]	connie.[REDACTED]@ [REDACTED]	<u>a6X3r0000000xl7</u>	Organic Search	Organic - Google	-	PostLC, Form	Web Form	8/9/2017 6:21 AM	0.00	0.00	0.00
Grand Totals (3 records)									1.00	1.00	1.00

## Example #2 from SFDC

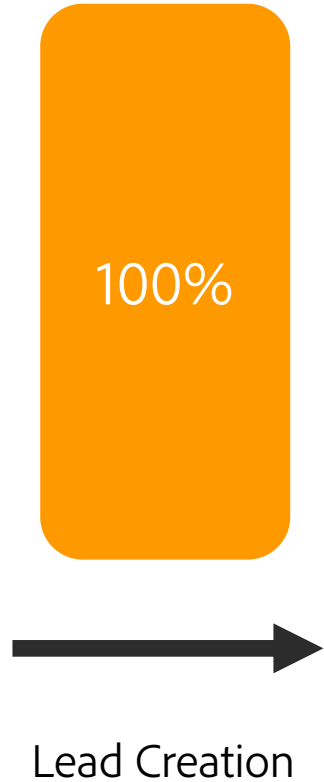
Full Name	Email	Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Type	Touchpoint Date ↑	Count - First Touch	Count - Lead Creation Touch	Count - U-Shaped
Lead ID: 00Q31000017G9JQ (7 records)									1.00	1.00	1.00
Gary DeAi	gary.desai@smartereas.com	a6X3r00000022NM	Social	linkedin	Content - Marketo AdWords Guide	FT	Web Visit	10/27/2014 9:26 PM	1.00	0.00	0.50
Gary DeAi	gary.desai@smartereas.com	a6X3r0000000hRN	Direct	Web Direct	-	LC, Form	Web Form	10/28/2014 5:53 AM	0.00	1.00	0.50
Gary DeAi	gary.desai@smartereas.com	a6X3r00000022NN	Organic Search	Organic - Google	-	PostLC	Web Visit	8/4/2016 10:14 AM	0.00	0.00	0.00
Gary DeAi	gary.desai@smartereas.com	a6X3r00000022NO	Social	linkedin	-	PostLC	Web Visit	8/9/2016 2:54 PM	0.00	0.00	0.00



## Example questions to use with the FT model:

- How are people interacting with my brand for the very first time?
- What Channels and Campaigns are responsible for first exposure to my brand?
- What trends are there for our Anonymous First Touches?
  - What are the top landing pages?
  - What are the top referral sites?
  - How can we drive quicker conversion?
- What content is most popular at the very top of the funnel?
- How are my brand awareness Campaigns performing?

# Lead Creation (LC) Touch Attribution



Attribute to Evaluate	Details
Model Type	Single Touch Model – 100% of credit to one touchpoint
Credit Allocation	Lead Creation touch
Best Use Case	You want to identify which channels are driving <b>known leads</b>
Notes	Lead Creation means self-identification for Bizible purposes (e.g. a form fill)

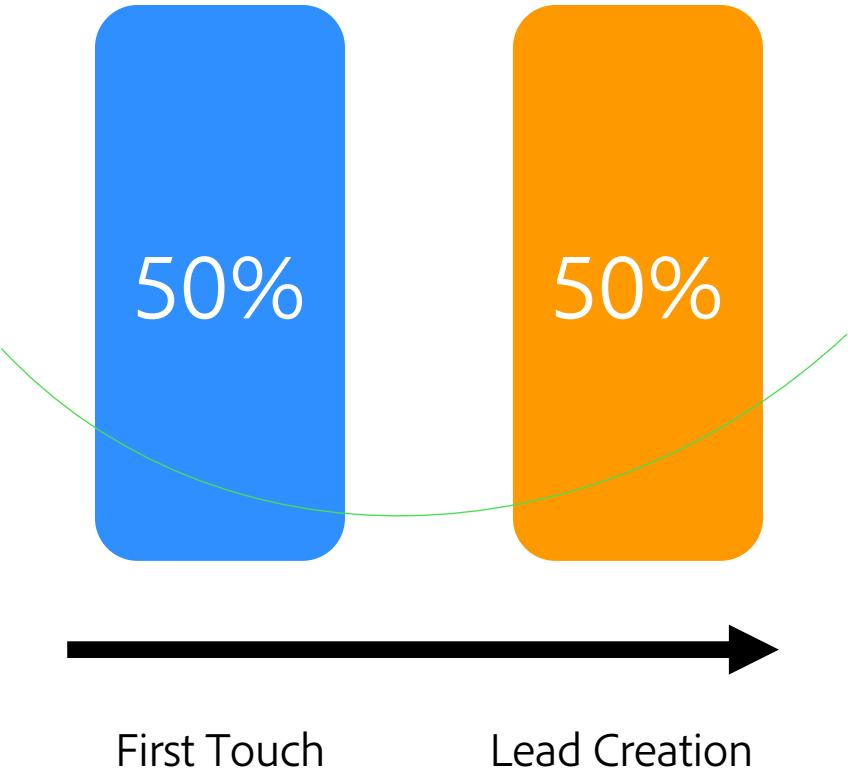
## Example from SFDC

Full Name	Email	Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Type	Touchpoint Date ↑	Count - First Touch	Count - Lead Creation Touch	Count - U-Shaped
Lead ID: 00Q31000017G9JQ (7 records)									1.00	1.00	1.00
Gary DeAti	gary.d@amertheor.com	a6X3r00000022NM	Social	linkedin	Content - Marketo AdWords Guide	FT	Web Visit	10/27/2014 9:26 PM	1.00	0.00	0.50
Gary DeAti	gary.d@amertheor.com	a6X3r0000000hRN	Direct	Web Direct	-	LC, Form	Web Form	10/28/2014 5:53 AM	0.00	1.00	0.50
Gary DeAti	gary.d@amertheor.com	a6X3r00000022NN	Organic Search	Organic - Google	-	PostLC	Web Visit	8/4/2016 10:14 AM	0.00	0.00	0.00
Gary DeAti	gary.d@amertheor.com	a6X3r00000022NO	Social	linkedin	-	PostLC	Web Visit	8/9/2016 2:54 PM	0.00	0.00	0.00

## Example questions to ask with the LC model:

- What messaging is most effective at driving conversions?
- How are people becoming known?
  - Which Channels? Subchannels? Campaigns?
- What content is best at influencing Leads into creation?
- Which forms are getting people to share their contact information?

# U-Shaped Attribution



Attribute to Evaluate	Details
Model Type	<b>Multi-Touch Model</b> – first MT Attribution Model Bizible offers
Credit Allocation	50% to <b>First Touch (FT)</b> and 50% to <b>Lead Creation (LC)</b> touch
Best Use Case	Powerful model for analyzing your marketing strategies <b>holistically at the top of the funnel</b>
Notes	Useful when you don't want to give one channel all credit as it is an aggregate measure

## Example #1 from SFDC

Full Name	Email	Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Type	Touchpoint Date ↑	Count - First Touch	Count - Lead Creation Touch	Count - U-Shaped
Lead ID: 00Q31000017G9JQ (7 records)										1.00	1.00
Gary Rossi	gary.rossi@smartbear.com	<a href="#">a6X3r00000022NM</a>	Social	linkedin	Content - Marketo AdWords Guide	FT	Web Visit	10/27/2014 9:26 PM	1.00	0.00	0.50
Gary Rossi	gary.rossi@smartbear.com	<a href="#">a6X3r0000000hRN</a>	Direct	Web Direct	-	LC, Form	Web Form	10/28/2014 5:53 AM	0.00	1.00	0.50
Gary Rossi	gary.rossi@smartbear.com	<a href="#">a6X3r00000022NN</a>	Organic Search	Organic - Google	-	PostLC	Web Visit	8/4/2016 10:14 AM	0.00	0.00	0.00
Gary Rossi	gary.rossi@smartbear.com	<a href="#">a6X3r00000022NO</a>	Social	linkedin	-	PostLC	Web Visit	8/9/2016 2:54 PM	0.00	0.00	0.00

## Example #2 from SFDC

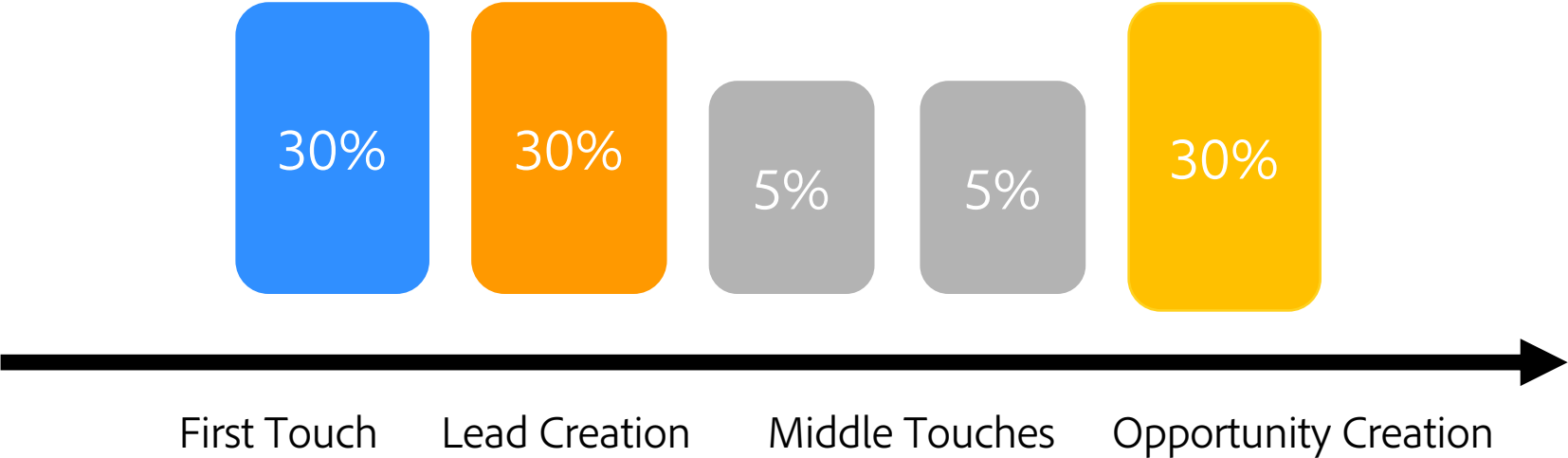
Full Name	Email	Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Type	Touchpoint Date ↑	Count - First Touch	Count - Lead Creation Touch	Count - U-Shaped
Lead ID: 00Q31000017G4Zi (3 records)									1.00	1.00	1.00
Connie [REDACTED]	connie.[REDACTED]	<u>a6X3r0000000xl8</u>	Social	linkedin	SU - CMO JT	FT, LC, Form	Web Form	1/3/2016 11:58 PM	1.00	1.00	1.00
Connie [REDACTED]	connie.[REDACTED]	<u>a6X3r0000000xl6</u>	Social	LinkedIn	SU - ABM Accounts - Mktg JF	Demo Scheduled-01 (Last), PostLC, Form	Web Form	8/28/2016 12:24 PM	0.00	0.00	0.00
Connie [REDACTED]	connie.[REDACTED]	<u>a6X3r0000000xl7</u>	Organic Search	Organic - Google	-	PostLC, Form	Web Form	8/9/2017 6:21 AM	0.00	0.00	0.00
Grand Totals (3 records)									1.00	1.00	1.00



## Example questions to ask with the U-Shaped Model:

- Any of the questions relevant to the FT & LC Models but if you want a more aggregate measure, for example:
  - Which channels are most effective at the top of the funnel from a balanced perspective?

# W-Shaped Attribution



Attribute to Evaluate	Details
Model Type	Multi-Touch Model – goes up until the point of Opportunity Creation (OC)
Credit Allocation	30% to FT, LC, and OC while 10% goes to middle touches
Best Use Case	You want a more comprehensive view of influenced Pipeline Revenue

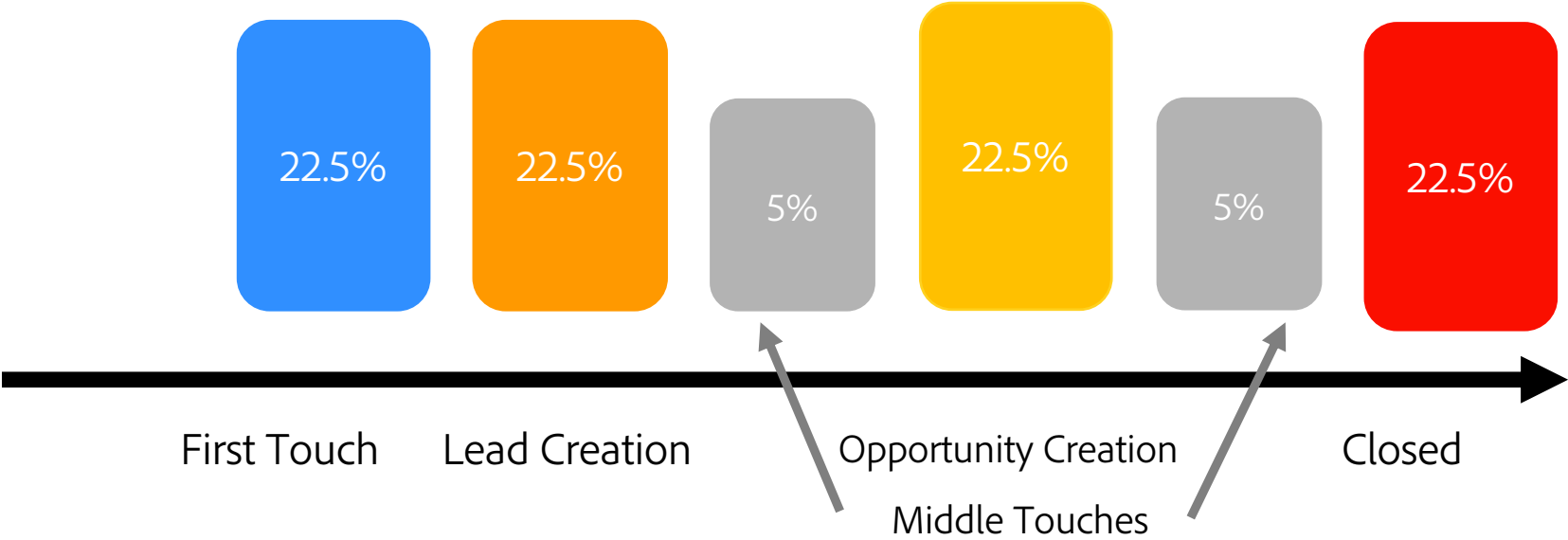
## Example from SFDC

Contact	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Date ↑	Attribution % W-Shaped	Count - W-Shaped	Revenue - W-Shaped
						1.00	\$18,000.00
<u>Thomas</u>	CRM Campaign	2015 Marketo Summit	FT, LC, Form	4/13/2015 12:00 AM	60.0000%	0.60	\$10,800.00
<u>Jay C</u>	CRM Campaign	2015 Marketo Block Party	Form	7/14/2015 12:00 AM	5.0000%	0.05	\$900.00
<u>Thomas</u>	CRM Campaign	2015 Marketo Block Party	Form	7/14/2015 12:00 AM	5.0000%	0.05	\$900.00
<u>Earl F</u>	Google AdWords	Pipeline Marketing	Demo Scheduled-01 (Last), OC, Form	9/25/2015 4:29 PM	30.0000%	0.30	\$5,400.00
<u>Thom I</u>	linkedin	SU - SaaS Skill - Mktg JF	Closed, Form	2/7/2016 8:58 AM	0.0000%	0.00	\$0.00

## Example questions to ask with the W-Shaped Model:

- What is the last touch before Opportunity Creation?
- What channels are driving the most Pipeline Revenue?
- What percentage of Pipeline has Marketing touched?
- How is Marketing influencing pipeline generation?
  - Number of Opps
  - Open Dollars?

# Full Path Attribution



Attribute to Evaluate	Details
Model Type	Multi-Touch Model – the most robust OOB model
Credit Allocation	22.5% to FT, LC, OC, and Closed while 10% goes to middle touches Note: Closed could be Won or Lost so important to filter reports accordingly
Best Use Case	You're looking to compare touches across the full opportunity cycle

# Example from SFDC

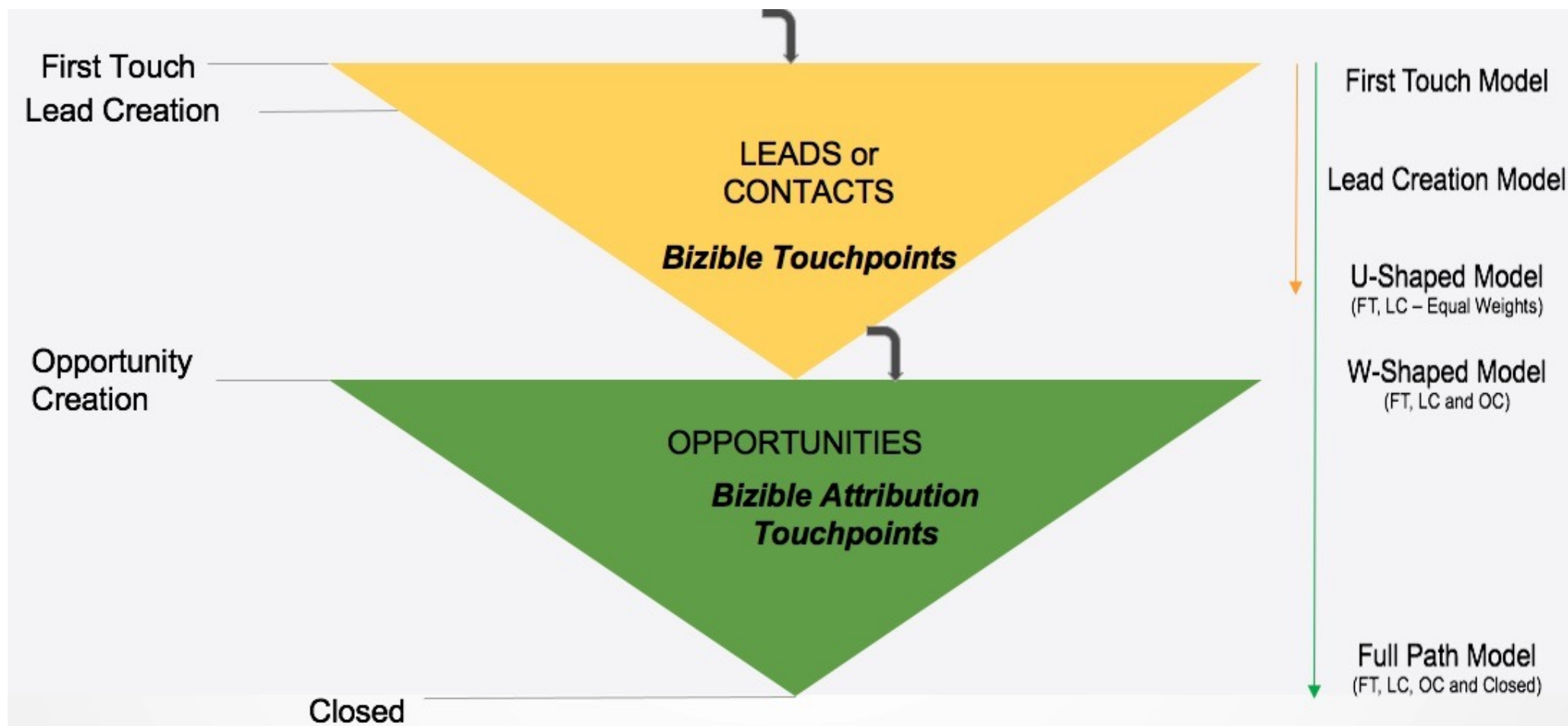
Marketing Channel	Contact	Touchpoint Source	Ad Campaign Name	Touchpoint Position	Touchpoint Date ↑	Attribution % Full Path	Count - Full Path	Revenue - Full Path
<div> <div>is)</div> <div>is)</div> <div> <div>▲</div> <div>▼</div> </div> </div>							0.98	\$42,000.00
Partner Marketing	<u>Susan</u>	CRM Campaign	Netline	FT, LC, Form	2/12/2014 10:08 AM	45.0000%	0.45	\$18,900.00
Social	<u>William S</u>	linkedin	SU Blog - B2B Mktg1	Demo Scheduled-01 (Last), OC, Form	12/15/2015 8:34 AM	22.5000%	0.22	\$9,450.00
Social	<u>William S</u>	linkedin	SU Blog - B2B Mktg1	-	3/11/2016 9:55 AM	3.3333%	0.03	\$1,400.00
Social	<u>William</u>	LinkedIn	SU - ABC Accounts - Mktg JF	Form	5/17/2016 3:56 PM	3.3333%	0.03	\$1,400.00
Social	<u>William</u>	LinkedIn	SU - ABC Accounts - Mktg JF	-	7/21/2016 12:53 PM	3.3333%	0.03	\$1,400.00
Direct	<u>William</u>	Web Direct	-	Closed, Form	7/21/2016 3:27 PM	22.5000%	0.22	\$9,450.00

## Questions to ask with the Full Path Model:

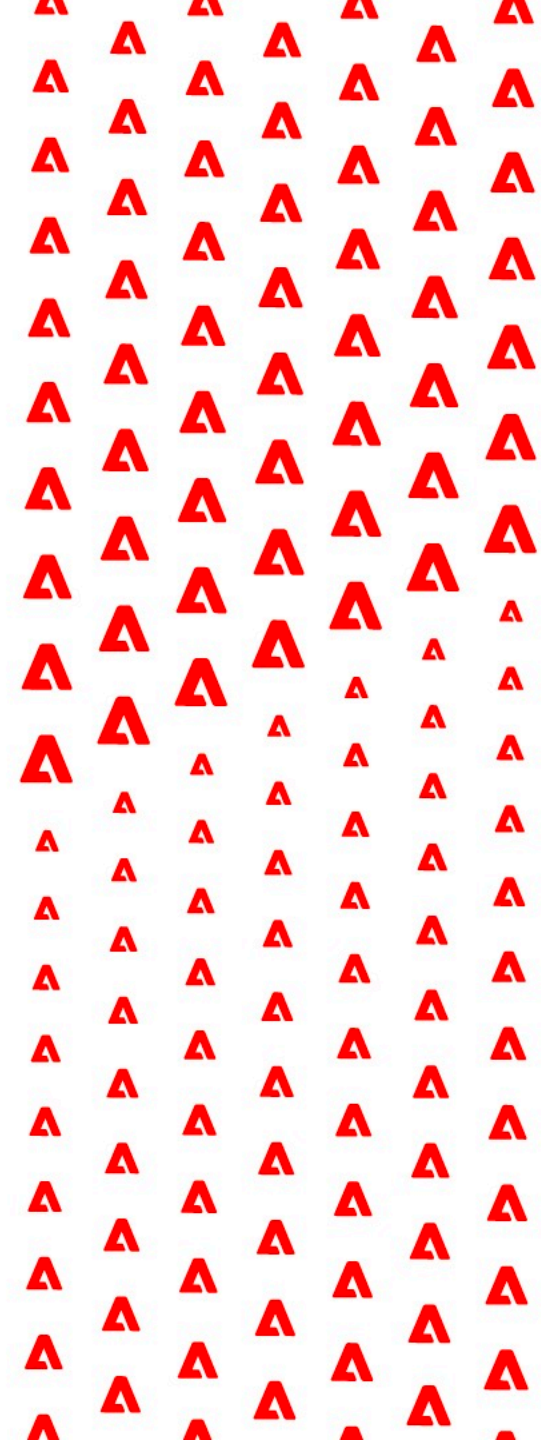
- What is contributing to the bottom line?
- What channels, campaigns, content helped drive Opportunities to Close?
- Anything related to revenue!



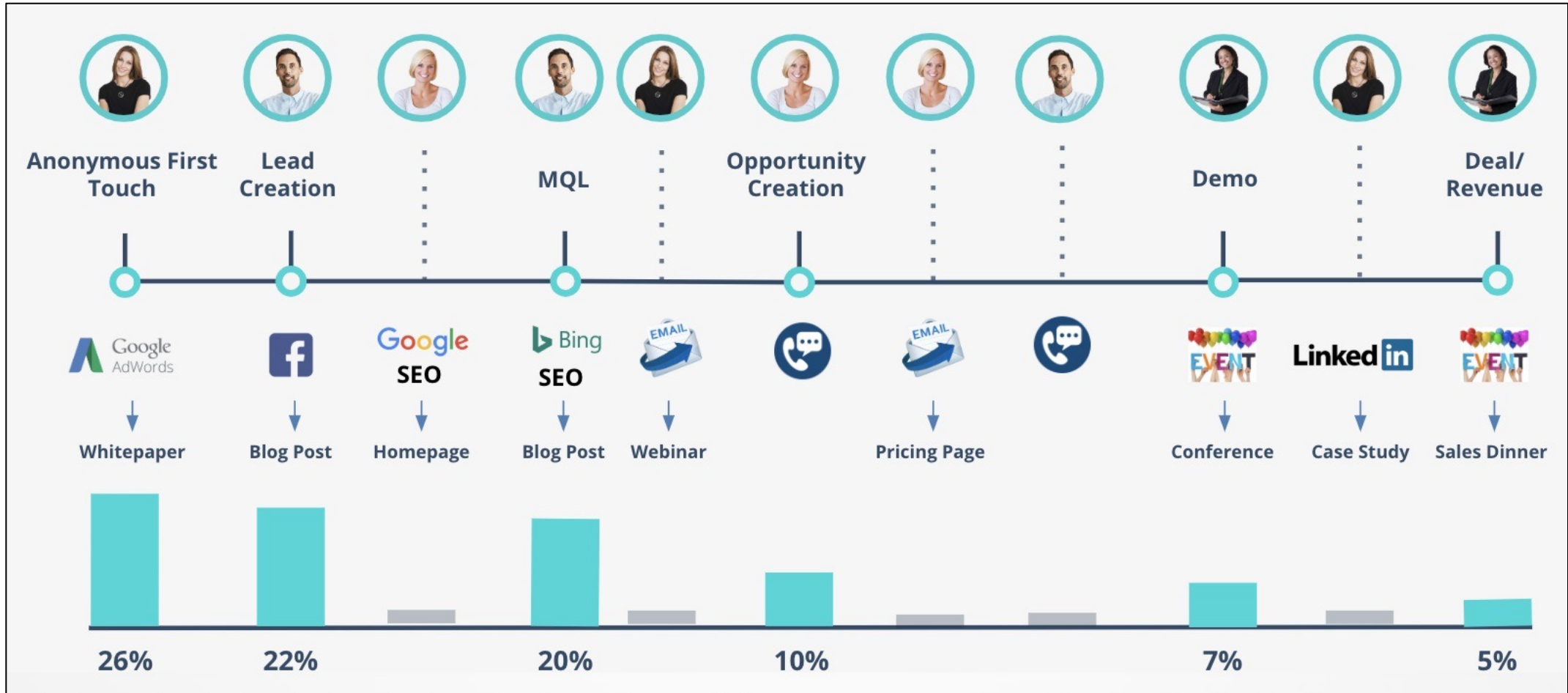
# Complete View of each Model's Scope



# Bizable's Custom Attribution Model



# Custom Model Attribution

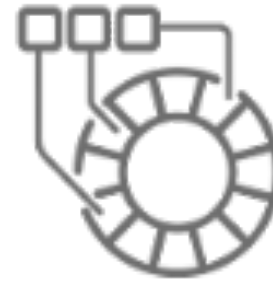


# Building the Custom Model

- Can add up to **6 additional stages** on top of the Full Path Model
  - Don't include anything already represented by FT, LC, OC or Closed



Start small to get comfortable and expand if needed

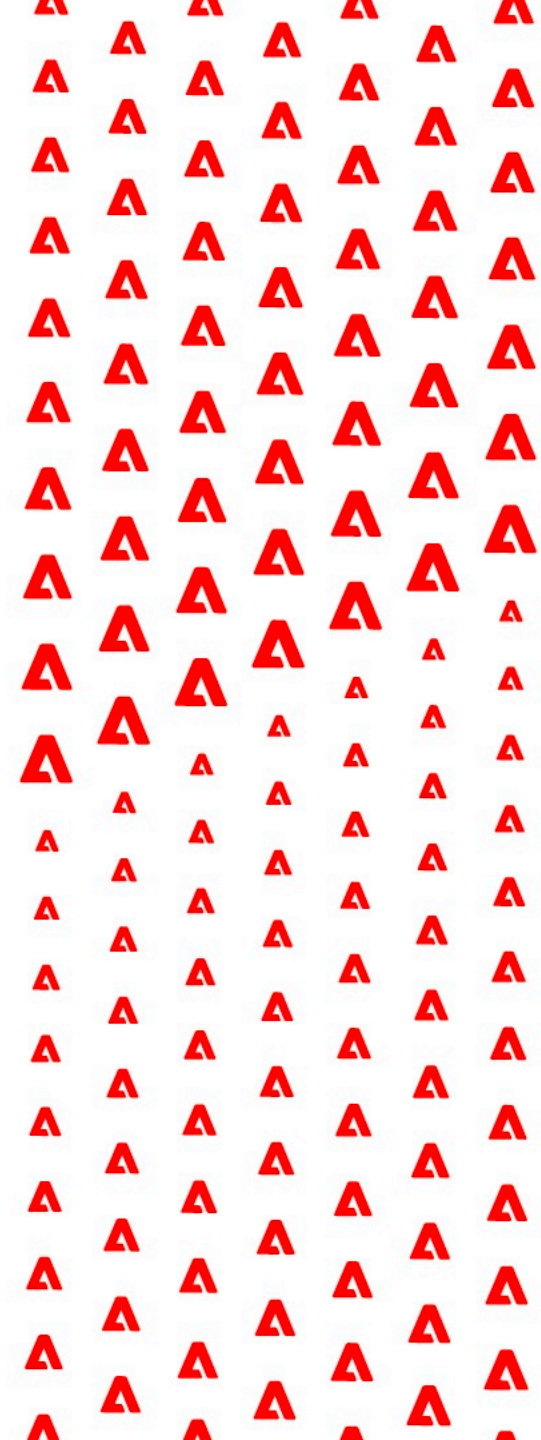


Keep “stage hopping” in mind

# Stage Hopping Example

		Funnel Stage		Custom Model
+		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+	Nurture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+	SQL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	SAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	Sales Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Leveraging the Attribution Models in Reporting



# Adding Attribution Models to a SFDC Report

REPORT ▼

BIZ TP - Monthly Pipeline

Opportunities with Bizible Attribution Touchpoint

Got Feedback?

↶ ↷

🔄

Save ▼

Close

Run

Outline

Filters 4

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Fields

Groups

GROUP ROWS

Add group...

Marketing Channel

GROUP COLUMNS

Add group...

Columns

Add column...

Attribution Touchpoint

# Revenue - W-Shaped

# Opp Count W-Shaped

# Attribution % W-Shaped

# Revenue - Full Path

# Count - Full Path

# Attribution % Full Path

Sum of Revenue - ...

Marketing Channel

Direct

Events

Organic Search

Partner Marketing

Social

Marketing Channel	Attribution Touchpoint	Revenue - W-Shaped	Opp Count W-Shaped	Attribution % W-Shaped	Revenue - Full Path	Count - Full Path	Attribution % Full Path
	a5r0Z000000WqkO	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
	a5r0Z000000WqkW	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
Subtotal		\$260.88	0.000	0.1449%	\$236.85	0.00	0.1316%
Events	a5r0Z000000Wqje	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
	a5r0Z000000Wqjg	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
	a5r0Z000000Wqjl	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
	a5r0Z000000WqkU	\$86.96	0.000	0.0483%	\$78.95	0.00	0.0439%
Subtotal		\$347.84	0.000	0.1932%	\$315.80	0.00	0.1754%

Row Counts Detail Rows Subtotals Grand Total

Conditional Formatting



## Now what...?

- Each model has pros and cons so you must decide which is best for your business and overall marketing strategy
- Ask yourself questions like “What are my Marketing Goals?” to identify which Attribution model will be most effective at measuring
- Understand that no one model will be ‘best’ for everything – it is common to use multiple
- Different customers will use different models for similar scenarios and that is OK!

# Tips

- Remember all Touchpoints are equal in their eligibility for Attribution Credit
  - Make sure you are being “fair” with what counts as a touchpoint across the different sources (Marketo, JS, CRM)
- Look at Attribution Models side by side in a CRM report for a visual understanding
- Think of attribution as a pizza!
  - Choosing how you want to “slice” it
- Align internally on what models make the most sense for the business (and when)



# Attribution Model/Stock Report Cheat Sheet

Area of the Funnel	Attribution Model(s)	Stock Reports	Notes
Top	<ul style="list-style-type: none"><li>First Touch</li><li>Lead Creation</li><li>U-Shaped</li></ul>	<ul style="list-style-type: none"><li>Bizable 101   Leads by ID (or Channel)</li><li>Bizable 101   Leads/Contacts by ID (or Channel)</li></ul>	
Middle	<ul style="list-style-type: none"><li>W-Shaped</li></ul>	<ul style="list-style-type: none"><li>Bizable 101   Opportunities by ID (or Channel)</li></ul>	Filter to Opp Stage = Open
Full/Bottom	<ul style="list-style-type: none"><li>Full Path</li><li>Custom</li></ul>	<ul style="list-style-type: none"><li>Bizable 101   Opportunities by ID (or Channel)</li></ul>	Filter to Opp Stage = Closed Won

## Recap: Now you know...



An **Attribution Model** is a way for your org to assign credit appropriately across the buying journey



The 5 stock Bizible Attribution Models answer different questions:

- **Single Touch Models** focus on one specific touch in the TOFU
- **Multi-Touch Models** balance credit across the opportunity stages



A **Custom Attribution Model** can be an effective model for your reporting if you plan your strategy carefully ahead of time



Select the right Attribution Model(s) for your org based on your **marketing strategy, key business questions, and business model**

# Helpful Links

- [Bizable Attribution Models Support Article](#)
- [Peer Perspective: Bizable Attribution Models with Justin Norris \(video\)](#)
- [Bizable Custom Model Support Article](#)
- [Bizable Tips & Tricks Webinar \(4/8/2021\)](#)

Sign up for the Bizable User Group!

- <https://mugs.marketo.com/virtual-bizable-user-group/>

Kate [blogs about Bizable every Tuesday](#)

- Check them out and please suggest topics!



