



# Tracking Touchpoints:



Reporting with BTs and BATs



# Housekeeping



Slides for this webinar can be found in PDF form using the resources widget



Have a question? Use the chat box and we'll answer your question via email or at the end of the session



Take our survey to help us improve your future webinar experience



Check out additional resources to help improve your Bizible skills



# Introduction

Hi, I'm Kimberly

Hi



# Agenda

- BTs vs BATs
- Best reports to use for BTs and BATs
- When to use BTs or BATs and why
- Time for Q&A



# BTs vs BATs

- Bizible Touchpoints or, BTs, relate to **Lead, Contact, and Case** Objects
- Bizible Attribution Touchpoints, or, BATs, relate to **Contact, Case, and Opportunity** Objects
- TL;DR: BTs will never relate to Revenue. BATs is where you will see revenue associated with marketing interactions!

Touchpoint Type	Lead Object	Contact Object	Case Object	Opportunity Object
BT	x	x	x	
BAT		x	x	x

# BTs vs BATs



BTs



BTs



OPPORTUNITY



BATs



# Remember...

- Not every BT will become a BAT
- (depending on how you have Bizible set up), not every person may have BATs associated with them (contact role)
- BATs are associated with the Contact, Case and Opportunity



Let's take a look at these in SFDC



# BTs - Contact Record

The screenshot shows a CRM interface with a navigation bar at the top containing 'Service', 'Home', 'Chatter', 'Cases', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Learning Passports'. The 'Contacts' menu is active. Below the navigation bar, there is a contact header for 'Contact' with a profile picture icon and a '+ Follow' button. To the right of the header are buttons for 'Create Opportunity', 'Edit', and 'View Contact Hierarchy'. The main content area is titled 'Bizible Touchpoint (6+)' and contains a table with the following columns: 'Bizible Touchpoint', 'Marketing Channel', 'Touchpoint Source', and 'Ad Campaign Name'. The table lists six touchpoints with various marketing channels and sources. A 'View All' link is located at the bottom of the table.


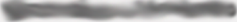
Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name
[Redacted]	Direct	Web Direct	[Redacted]
[Redacted]	Email	batch	[Redacted]
[Redacted]	Content Syndication	CRM Campaign	[Redacted]
[Redacted]	Display	google	[Redacted]
[Redacted]	Email	batch	[Redacted]
[Redacted]	Email	batch	[Redacted]

[View All](#)



# BATs - Opportunity Record

Service Home Chatter Cases Accounts Contacts Reports Dashboards Learning Passports




Opportunity  

+ Follow Accept Opportunity Clone Edit



Opportunity Progression

Marketable Insight

**Bizable Attribution Touchpoint (3+)**

- [a7V3t0000029C70](#)  
Contact:   
Marketing Chan... Content Syndication.null  
Touchpoint Pos... Form
- [a7V3t0000029C71](#)  
Contact:   
Marketing Chan... Email.Batch  
Touchpoint Pos... Form
- [a7V3t0000029C72](#)  
Contact:   
Marketing Chan... Email.Batch  
Touchpoint Pos... Form

[View All](#)



# BATs - Opportunity Record

Service Home Chatter Cases Accounts Contacts Reports Dashboards Learning Passports

Opportunities > **Bizable Attribution Touchpoint** New

16 items • Updated a few seconds ago Settings Refresh Filter

	Attribution Touc...	Contact	Marketing Channel - ...	Touchpoint Position	Revenue - ...	Revenue - ...	
1	[blurred]	[blurred]	Content Syndication.null	Form	[blurred]	[blurred]	▼
2	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
3	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
4	[blurred]	[blurred]	Display.Google	Form	[blurred]	[blurred]	▼
5	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
6	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
7	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
8	[blurred]	[blurred]	Email.Batch	FT, LC, Form	[blurred]	[blurred]	▼
9	[blurred]	[blurred]	Email.Batch	Form	[blurred]	[blurred]	▼
10	[blurred]	[blurred]	Paid Search.Google	Form	[blurred]	[blurred]	▼
11	[blurred]	[blurred]	Paid Social.Linkedin	Form	[blurred]	[blurred]	▼
12	[blurred]	[blurred]	Paid Social.Linkedin	Inquiry, AQL, TAL, OC, 1. Pre-Call Plan, 2. Prospect, 3. Opportunity Qualifications, Form	[blurred]	[blurred]	▼
13	[blurred]	[blurred]	Email.Batch	4. Circle of Influence, Form	[blurred]	[blurred]	▼
14	[blurred]	[blurred]	Content Syndication.null	Form	[blurred]	[blurred]	▼
15	[blurred]	[blurred]	Content Syndication.null	Form	[blurred]	[blurred]	▼

# BTs and BATs - Contact Record

The screenshot displays a CRM interface for a contact record. The top navigation bar includes 'Service', 'Home', 'Chatter', 'Cases', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Learning Passports'. The contact's name is partially visible as 'Contact [redacted]'. Action buttons include '+ Follow', 'Create Opportunity', 'Edit', and 'View Contact Hierarchy'. Two sections are highlighted with a red dashed border: 'Bizible Touchpoint (6+)' and 'Bizible Attribution Touchpoint (6+)'. The first section is a table with columns for touchpoint, marketing channel, source, and campaign name. The second section is a table with columns for attribution touchpoint, marketing channel, opportunity, and campaign name.

**Bizible Touchpoint (6+)**

Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name
[redacted]	Direct	Web Direct	[redacted]
[redacted]	Email	batch	[redacted]
[redacted]	Content Syndication	CRM Campaign	[redacted]
[redacted]	Display	google	[redacted]
[redacted]	Email	batch	[redacted]
[redacted]	Email	batch	[redacted]

[View All](#)

**Bizible Attribution Touchpoint (6+)**

Attribution Touchpoint	Marketing Channel	Opportunity	Ad Campaign Name
[redacted]	Email	[redacted]	[redacted]
[redacted]	Email	[redacted]	[redacted]
[redacted]	Email	[redacted]	[redacted]
[redacted]	Email	[redacted]	[redacted]

Let's move on to reporting!



# BTs and BATs - Report Types

BTs



### Choose Report Type

Search: bizible

- Accounts & Contacts
  - Bizible Persons with Lead
  - Bizible Persons with Bizible Touchpoints**
  - Bizible Persons with Bizible Touchpoints and Account
  - Bizible Persons with Bizible Touchpoints and Case
  - Bizible Persons with Bizible Touchpoints and Contact
  - Bizible Persons with Bizible Touchpoints and Salesforce Campaign
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
  - Bizible Persons and Connections

Cancel Continue

# BTs and BATs - Report Types

BATs

Choose Report Type

Search: bizible

All	Bizible Attribution Touchpoint with Account
Accounts & Contacts	Bizible Attribution Touchpoint with Contact
Opportunities	Bizible Attribution Touchpoint with Opportunity
Customer Support Reports	Bizible Attribution Touchpoint with Salesforce Campaign
Leads	Bizible Attribution Touchpoint and Connections
Campaigns	Bizible Persons
Activities	Bizible Persons with Case
Contracts and Orders	

Buttons: Cancel, Continue

# When to use BTs or BATs and WHY?

## Advantages to using BTs:

- Understanding a **person's** individual journey (isolated analysis)
- Understanding **all** interactions as a whole
- TOFU
- Troubleshooting

## Advantages to using BATs:

- Understanding marketing's impact on revenue, ROI
- Understanding important interactions at a higher level (multiple people/account)
- Full Funnel analysis

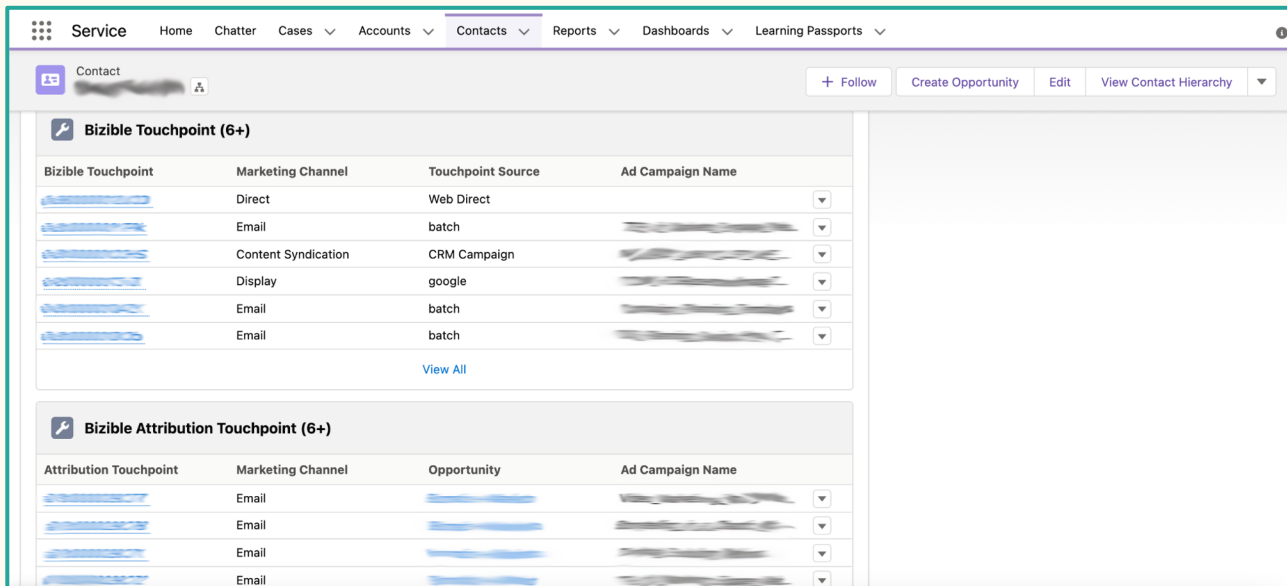
## Advantages to using BOTH:

- Side by Side Analysis (dashboard reporting)

# When to use BTs or BATs and WHY?

## Advantages to using BTs:

- Understanding a **person's** individual journey (isolated analysis)



The screenshot displays a CRM interface for a contact. The top navigation bar includes 'Service', 'Home', 'Chatter', 'Cases', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Learning Passports'. The contact profile shows a 'Contact' card with a '+ Follow' button and 'Create Opportunity', 'Edit', and 'View Contact Hierarchy' options.

Two sections are visible:

- Bizible Touchpoint (6+)**: A table listing touchpoints with columns for Bizible Touchpoint, Marketing Channel, Touchpoint Source, and Ad Campaign Name.
- Bizible Attribution Touchpoint (6+)**: A table listing attribution touchpoints with columns for Attribution Touchpoint, Marketing Channel, Opportunity, and Ad Campaign Name.

Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name
[blurred]	Direct	Web Direct	[blurred]
[blurred]	Email	batch	[blurred]
[blurred]	Content Syndication	CRM Campaign	[blurred]
[blurred]	Display	google	[blurred]
[blurred]	Email	batch	[blurred]
[blurred]	Email	batch	[blurred]

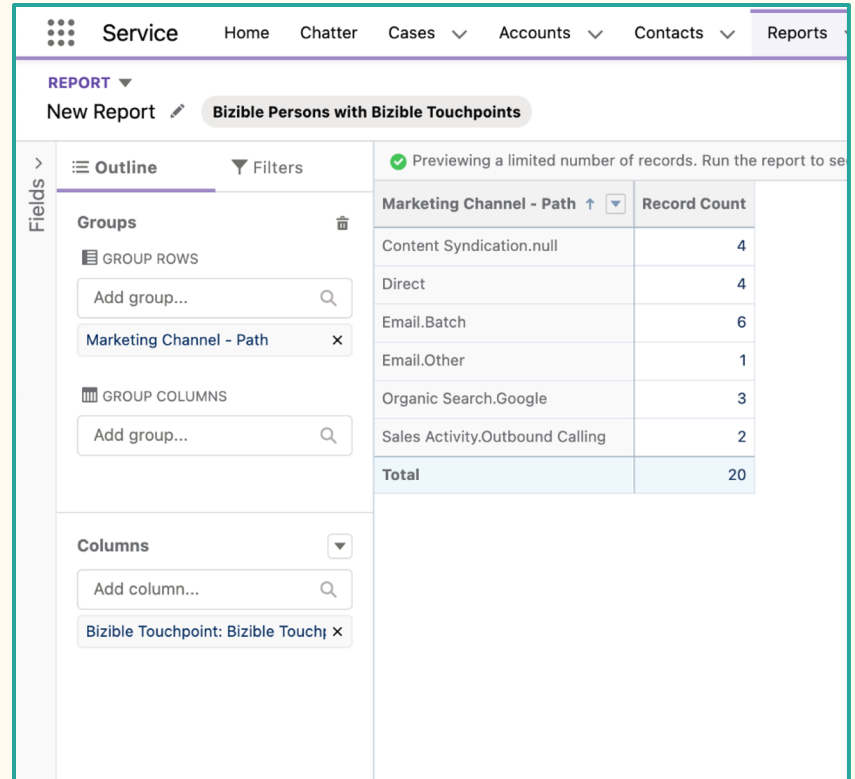
  

Attribution Touchpoint	Marketing Channel	Opportunity	Ad Campaign Name
[blurred]	Email	[blurred]	[blurred]
[blurred]	Email	[blurred]	[blurred]
[blurred]	Email	[blurred]	[blurred]
[blurred]	Email	[blurred]	[blurred]

# When to use BTs or BATs and WHY?

## Advantages to using BTs:

- Understanding interactions as a whole (not just isolated attribution TPs)



The screenshot shows a Salesforce report interface. The report title is "Bizible Persons with Bizible Touchpoints". The report is displayed in a table format with two columns: "Marketing Channel - Path" and "Record Count". The table contains the following data:

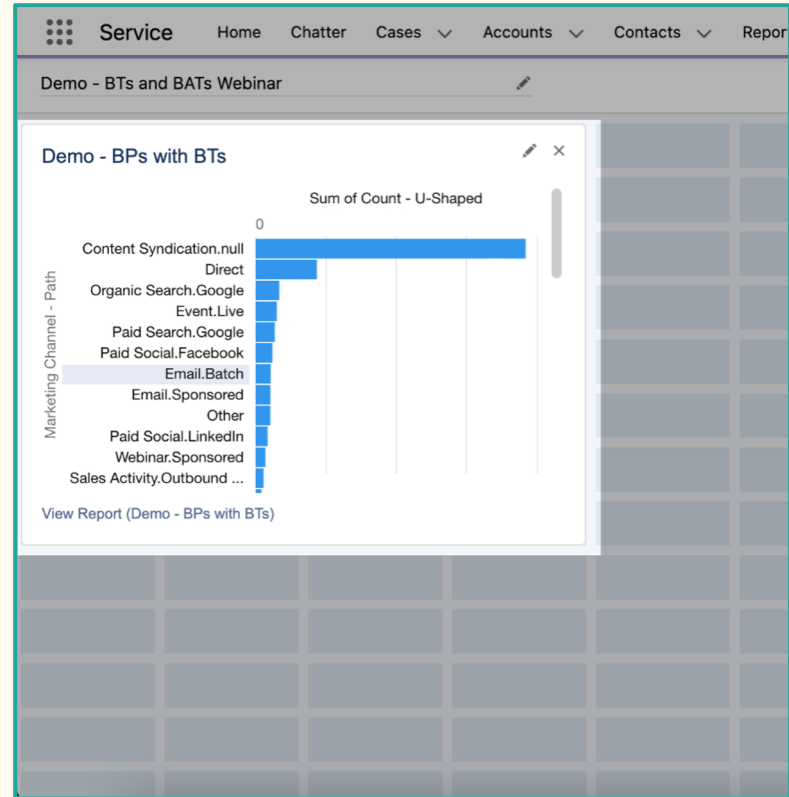
Marketing Channel - Path	Record Count
Content Syndication.null	4
Direct	4
Email.Batch	6
Email.Other	1
Organic Search.Google	3
Sales Activity.Outbound Calling	2
<b>Total</b>	<b>20</b>



# When to use BTs or BATs and WHY?

## Advantages to using BTs:

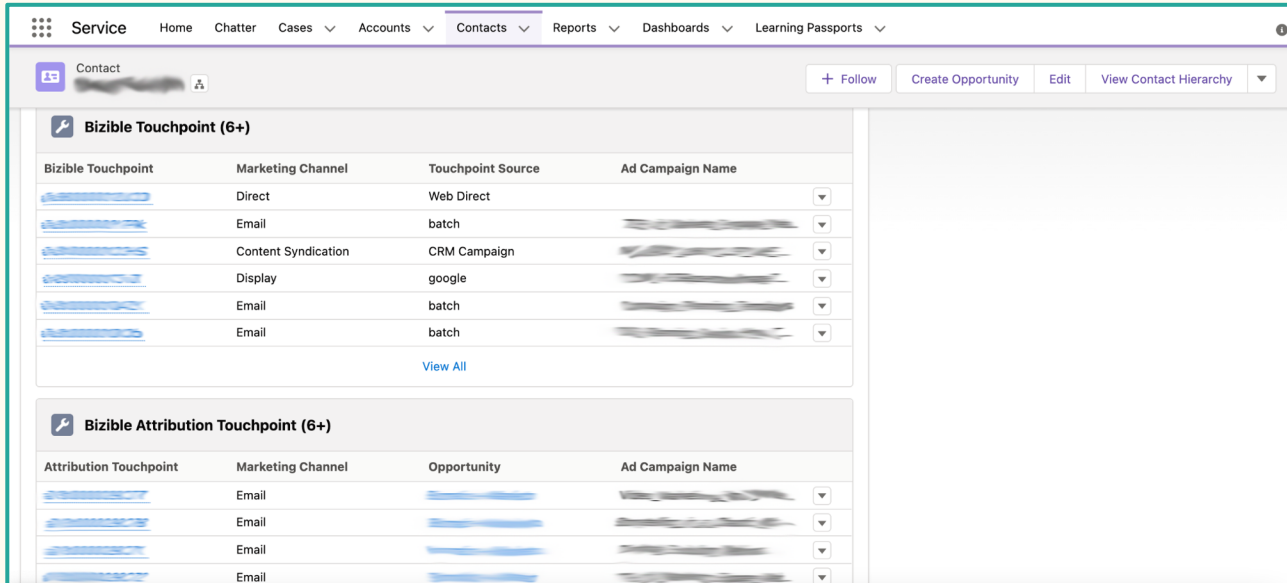
- TOFU Analysis



# When to use BTs or BATs and WHY?

## Advantages to using BTs:

- Troubleshooting



The screenshot displays a CRM interface with a navigation bar at the top containing 'Service', 'Home', 'Chatter', 'Cases', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Learning Passports'. Below the navigation bar, there is a 'Contact' header with a profile picture and a dropdown menu. The main content area is divided into two sections: 'Bizible Touchpoint (6+)' and 'Bizible Attribution Touchpoint (6+)'. Each section contains a table with columns for touchpoint details and a 'View All' link.

Bizible Touchpoint	Marketing Channel	Touchpoint Source	Ad Campaign Name
<a href="#">[blurred]</a>	Direct	Web Direct	[blurred]
<a href="#">[blurred]</a>	Email	batch	[blurred]
<a href="#">[blurred]</a>	Content Syndication	CRM Campaign	[blurred]
<a href="#">[blurred]</a>	Display	google	[blurred]
<a href="#">[blurred]</a>	Email	batch	[blurred]
<a href="#">[blurred]</a>	Email	batch	[blurred]

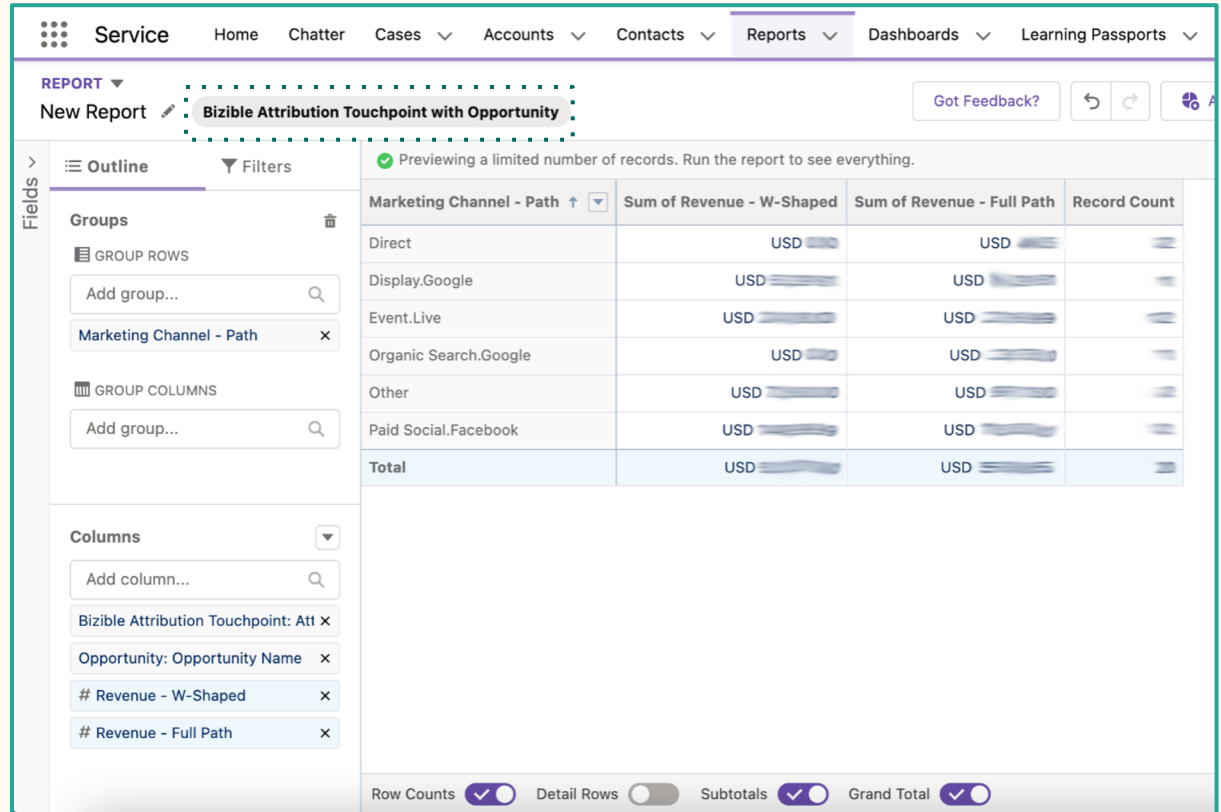
[View All](#)

Attribution Touchpoint	Marketing Channel	Opportunity	Ad Campaign Name
<a href="#">[blurred]</a>	Email	<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	Email	<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	Email	<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	Email	<a href="#">[blurred]</a>	[blurred]

# When to use BTs or BATs and WHY?

## Advantages to using BATs:

- Understanding marketing's impact on revenue, ROI



The screenshot shows a CRM report interface. At the top, there's a navigation bar with 'Service', 'Home', 'Chatter', 'Cases', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Learning Passports'. Below this, a 'REPORT' dropdown is set to 'New Report', and the report title is 'Bizible Attribution Touchpoint with Opportunity'. A 'Got Feedback?' button and refresh icons are also visible. The main content area is divided into a left sidebar and a main table. The sidebar has 'Outline' and 'Filters' sections. The 'Outline' section shows 'Groups' (GROUP ROWS) with 'Marketing Channel - Path' selected, and 'Columns' (GROUP COLUMNS) with 'Bizible Attribution Touchpoint: Att', 'Opportunity: Opportunity Name', '# Revenue - W-Shaped', and '# Revenue - Full Path' selected. The main table has a message: 'Previewing a limited number of records. Run the report to see everything.' The table has four columns: 'Marketing Channel - Path', 'Sum of Revenue - W-Shaped', 'Sum of Revenue - Full Path', and 'Record Count'. The data rows are: Direct, Display.Google, Event.Live, Organic Search.Google, Other, Paid Social.Facebook, and Total. Each revenue cell contains 'USD' followed by a blurred value. The bottom of the interface has toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

Marketing Channel - Path	Sum of Revenue - W-Shaped	Sum of Revenue - Full Path	Record Count
Direct	USD	USD	
Display.Google	USD	USD	
Event.Live	USD	USD	
Organic Search.Google	USD	USD	
Other	USD	USD	
Paid Social.Facebook	USD	USD	
<b>Total</b>	USD	USD	

# When to use BTs or BATs and WHY?

Service Home Chatter Cases Accounts Contacts Reports Dashboards Learning Passports

Opportunities > **Bizable Attribution Touchpoint** New

16 items • Updated a few seconds ago Settings Refresh Filter

	Attribution Touc... ▾	Contact ▾	Marketing Channel - ... ▾	Touchpoint Position ▾	Revenue - ... ▾	Revenue - ... ▾	
1			Content Syndication.null	Form			▾
2			Email.Batch	Form			▾
3			Email.Batch	Form			▾
4			Display.Google	Form			▾
5			Email.Batch	Form			▾
6			Email.Batch	Form			▾
7			Email.Batch	Form			▾
8			Email.Batch	FT, LC, Form			▾
9			Email.Batch	Form			▾
10			Paid Search.Google	Form			▾
11			Paid Social.Linkedin	Form			▾
12			Paid Social.Linkedin	Inquiry, AQL, TAL, OC, 1. Pre-Call Plan, 2. Prospect, 3. Opportunity Qualifications, Form			▾
13			Email.Batch	4. Circle of Influence, Form			▾
14			Content Syndication.null	Form			▾
15			Content Syndication.null	Form			▾

# When to use BTs or BATs and WHY?

## Advantages to using BATs:

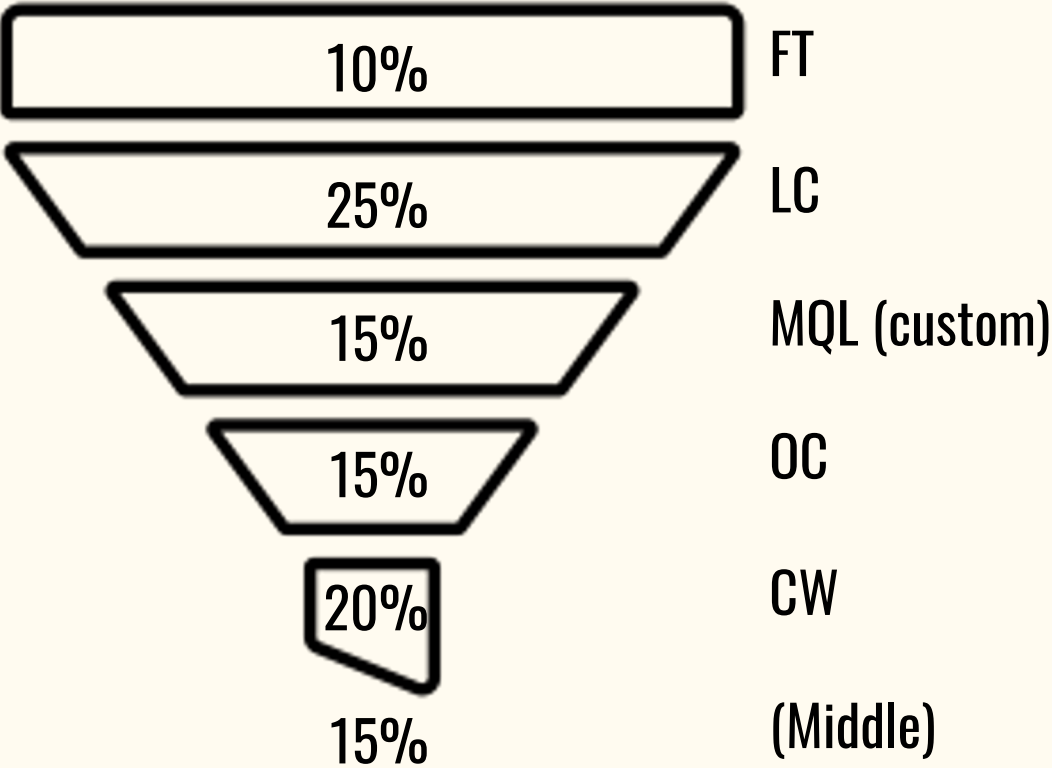
- Marketing ROI!
- Ability to show channel performance, subchannel performance, etc.



# When to use BTs or BATs and WHY?

## Advantages to using BATs:

- Full Funnel analysis



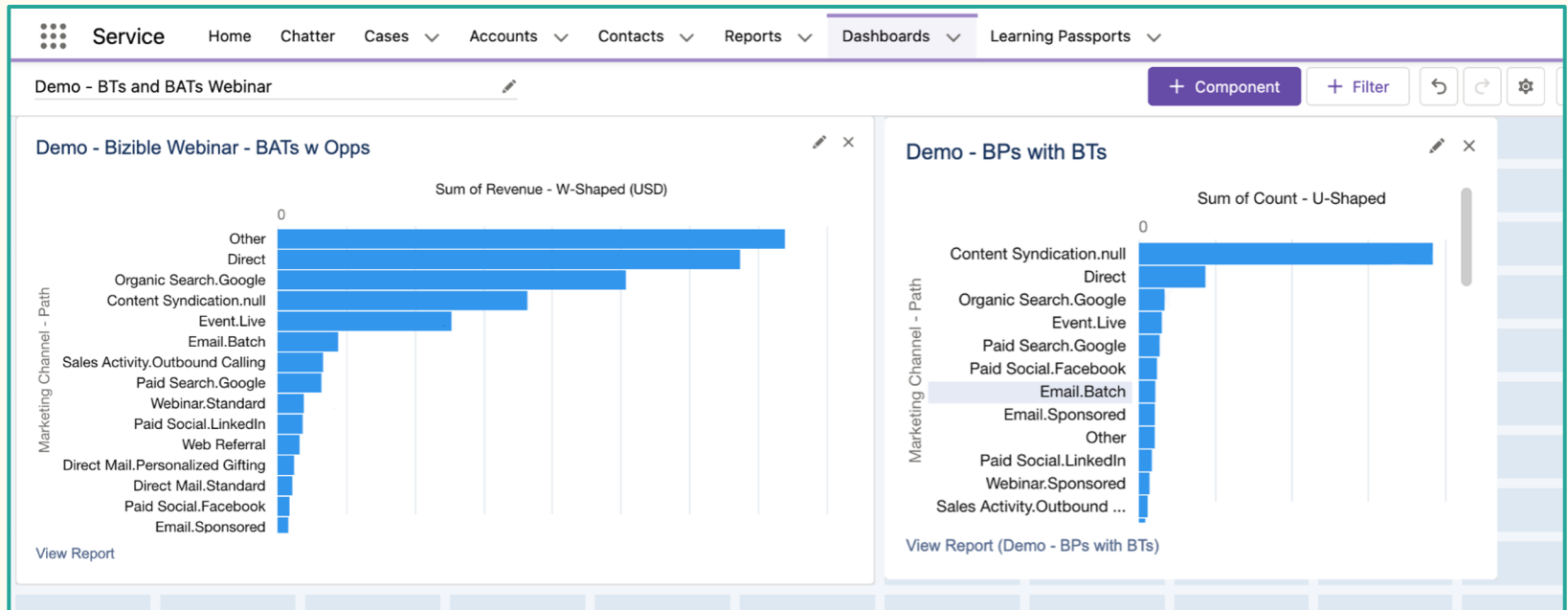
# When to use BTs or BATs and WHY?

## Advantages to using BOTH:

In addition to the full-funnel analysis from just BATs you can get an even BETTER picture of everything if you use both the BTs and BATs

# When to use BTs or BATs and WHY?

## Advantages to using BOTH:





# Recap

- **BTs: Bizible Touchpoints, a person's individual touchpoints**
- **BATs: Bizible Attribution Touchpoints, the touchpoints associated with an opportunity on an account (Think \$)**
- **Both are great for showing different things, BTs for all engagements/interactions people are having, BATs for how those interactions relate to the opportunities and when (full funnel) but the best picture of all is when you use a mix of all the views!**



Hope this was helpful!



# Questions?





# Thank you!

Kimberly Galitz

<https://www.linkedin.com/in/kimberlygalitz/>

