



Lead Attribution Reports

Lead attribution reports let marketers identify various touchpoints that contribute towards conversion in a customer's journey. It's important that we track these touchpoints to understand which approach encouraged the potential to become a customer or a subscriber.

❶ What is a touchpoint?

Touchpoints are the points of interaction between your website and a lead. Touch points can be anything from a cold call to a source which leads the potential to your website.

How does a lead attribution report help?

Your brand is planning to launch a new product soon and it will be marketed on several platforms like social media, brochures for existing customers and partners, and email campaigns to keep potential customers informed about the launch.

However, you plan to observe the lead response for all the marketing channels and decide to invest time and resources on the one which has the most responses from the prospects. Marketing attribution helps you to identify the most effective marketing channel.

- It will help you map the path of your prospects who've become customers while taking every touchpoint and interaction into account along the way.
- Gives you a proper understanding on which marketing channels are effective and which are not.

Dimensions of the attribution model

Attribution model can be chosen based on various dimensions. In Zoho Marketing Automation, we consider two dimensions:

- Lead source - Sources and (others) Third-party URLs that attributed towards conversion.
- URL - Website URLs that attribute towards conversion.

Attribution Models

We support the following attribution models in Zoho Marketing Automation:

First touch

This model gives credit based on a single touchpoint. It gives all of the credit to the marketing effort/channel that brought a visitor to your website for the first time. This model best works at the beginning of a new business or launch of a new product when importance is given for lead generation and brand awareness.

“ Example: Say a potential receives a survey-based campaign, signs up after visiting your company's webpage, participates in the survey, attends an online event relevant to your product, then converts at the end of the online event. In this case, all the credit would be given to the first touchpoint: the survey-based campaign.

Last touch

This model also gives credit based on a single touchpoint. It focuses on the last thing that triggered the expected response from the prospect while ignoring all the steps that were in between. This model is best suited to you if your goal is to generate maximum revenue.

“ Example: Say a potential receives a survey-based campaign, signs up after visiting your company's webpage, participates in the survey, attends an online event relevant to your product, then converts at the end of the online event. So, in this case, all the credit would be given to the last touchpoint: the online event.

Last non-direct (Only for Source)

This model also gives credit based on the single touchpoint. This model gives more weightage to the source and ignores direct hits to the website.

Direct hit - This refers to when a customer types in the website URL and accesses it directly, rather than accessing it from another source.

“ Example: Say a potential hears about an online event from an acquaintance. They sign up for it and attend. After the event, they received a feedback email along with the website URL of your product. They click the URL from the email and visit your website. In this case, all the credit would be given to the final source which lead you to their webpage - the feedback email.

Linear

This model also gives equal credit to all the touchpoints from start to end. This model gives credits to the middle touchpoints, which may be equally important in generating revenue as the first or the last touch. However, in reality that might not be the case. One of the touchpoint might be important compared to other touchpoints, so we let you choose the credit weightage (on level of 1 to 4) for each campaign and also exclude the ones that you think did not have much impact on the sale.

“ Example: Say you promote a webinar related to your product in LinkedIn and you observe that the conversion from people clicking on the LinkedIn link and signing up to your product was greater than the conversion achieved by webinar attendee. In this case, you can provide more points to LinkedIn compared to the webinar, since it contributed more to conversion comparatively.

First and last touch

This model also gives credit based on two touchpoints. As the name suggests, it is a combination of both first and last touch models wherein credit is equally divided among the two touchpoints.

“ Example: Say a potential receives a survey based campaign, signs up for the same after visiting your company's webpage, then participated in the survey, attended an online event relevant to your product then converted at the end of the event. So, in this case, all the credit would be given to the first and the last touchpoint: survey-based campaign and the online event.

U-Shaped

This model gives credit to all the key touchpoints: the first touchpoint, the last touchpoint, and all the touchpoints that lie between these touchpoints. The first touchpoint is given 40% of the credit. Similarly, the last touchpoint is given another 40%. The remaining 20% is divided evenly across the remaining touchpoints that occur between those two stages.

“ Example: Say a potential hears about an online event from an acquaintance. They sign up for it and attend. After the event, they received a feedback email along with the website URL of your product. They click the URL from the email and visit your website. So, in this case, 40% of the credit would be given to the first and the last touchpoint: survey-based campaign and the online event respectively. The remaining 20% is given to the survey as it is the only stage between the first and last touchpoints.

Last Interaction (Only for URLs)

This model gives credit based on a single touchpoint, that is, it gives all of the credit to the URL which led to the conversion URL. This model can be used to determine which among all your marketing channels leads to the

most conversion and then try to increase the visibility for that channel to get more conversions.

“ Example: Say a potential hears about an online event from an acquaintance. They sign up for it and attend. After the event, they received a feedback email along with the website URL of your product. They click the URL from the email and visit your website. In this case, the credit will be given to whichever action you consider conversion,

If your product is more service oriented, you can get many requests when people sign up for newsletters and become aware of all possible services you can provide, then all points would be given to the survey campaign signup URL as it gives most signup for newsletters which you consider an important conversion.

If you consider a potential buying your product and becoming a customer is important, then the online event URL is given all the credits as it leads to the conversion that you value.

Time Decay (Weightage given to the recent)

This model gives more credit to the most recent touchpoint. It is similar to the last touchpoint model, except it gives credits to all touchpoints. This model works better for longer sales cycle where the early touchpoints may not necessarily be important or contributing that much to a successful conversion.

Once the prospect is in the sales pipeline you focus more on nurturing them to encourage them towards the sale and consequently revenue. Instead of allocating equal or more credits to the initial stages, this model gives more credit to the most recent touchpoints that directly leads to revenue generation.

① Formula that can be used for Time Decay is:

$$N(t) = N_0 \left(\frac{1}{2} \right)^{\frac{t}{t_{1/2}}}$$

Deriving the formula in simpler terms:

$$y = 2^{-x/7}$$

Where "x" is the number of days the referral happened prior to the conversion. (x = Conversion Time - Visit Time of that source).

The 7 in the equation is the half-life. A touchpoint 7 days before a different touchpoint will receive half the credit.

Example: Say a user visits your site from a Google display ad, a remarketing ad, and a social channel, with the following time-line:



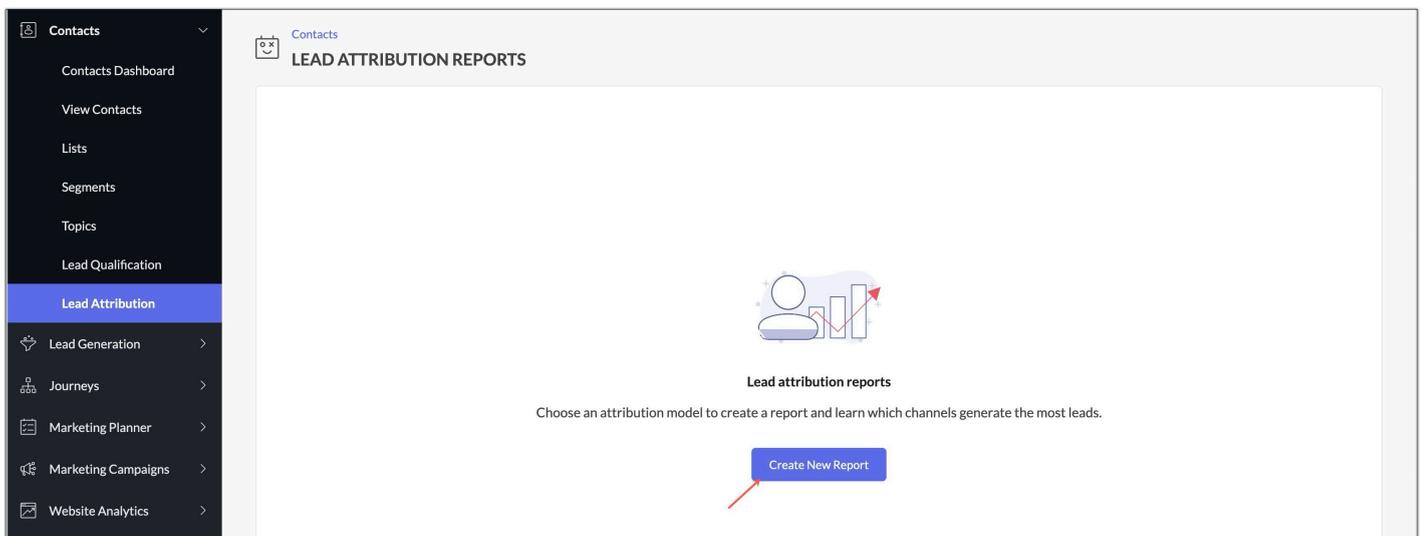
Here "purchase" is Signup/Contact Creation in our case.

Display	Remarketing	Social
2-8/7	2-4/7	2-1/7
.453	.673	.906
22.29%	33.13%	44.58%

How to set up an attribution model report

To set up an attribution model report:

1. From the *Navigation Toolbar* to the left, click **Contacts** and select **Lead Attribution**.
2. Click **Create New Report** if you're creating this for the first time, or **Create** if you have previously created lead attribution reports.



3. Enter the following information on the creation page:

- Enter a **Name** to identify the purpose of the report.
- Choose a **Dimension** - Lead source or URL.
- Choose a **Date Range**.
- Choose the Attribution Model and click **Create and Proceed**.

Lead Attribution Reports
← CREATE A LEAD ATTRIBUTION REPORT



Attribution report
Configure the basic aspects of the report and choose the attribution model you would like to use.

Name
Overall sales

Dimensions
 Lead source URL

Date range
Current year

Attribution model
U-shaped

i This is a multi-touch attribution model. Different conversion credit weight will be given to a range of touchpoints. [Learn how weight is assigned](#)

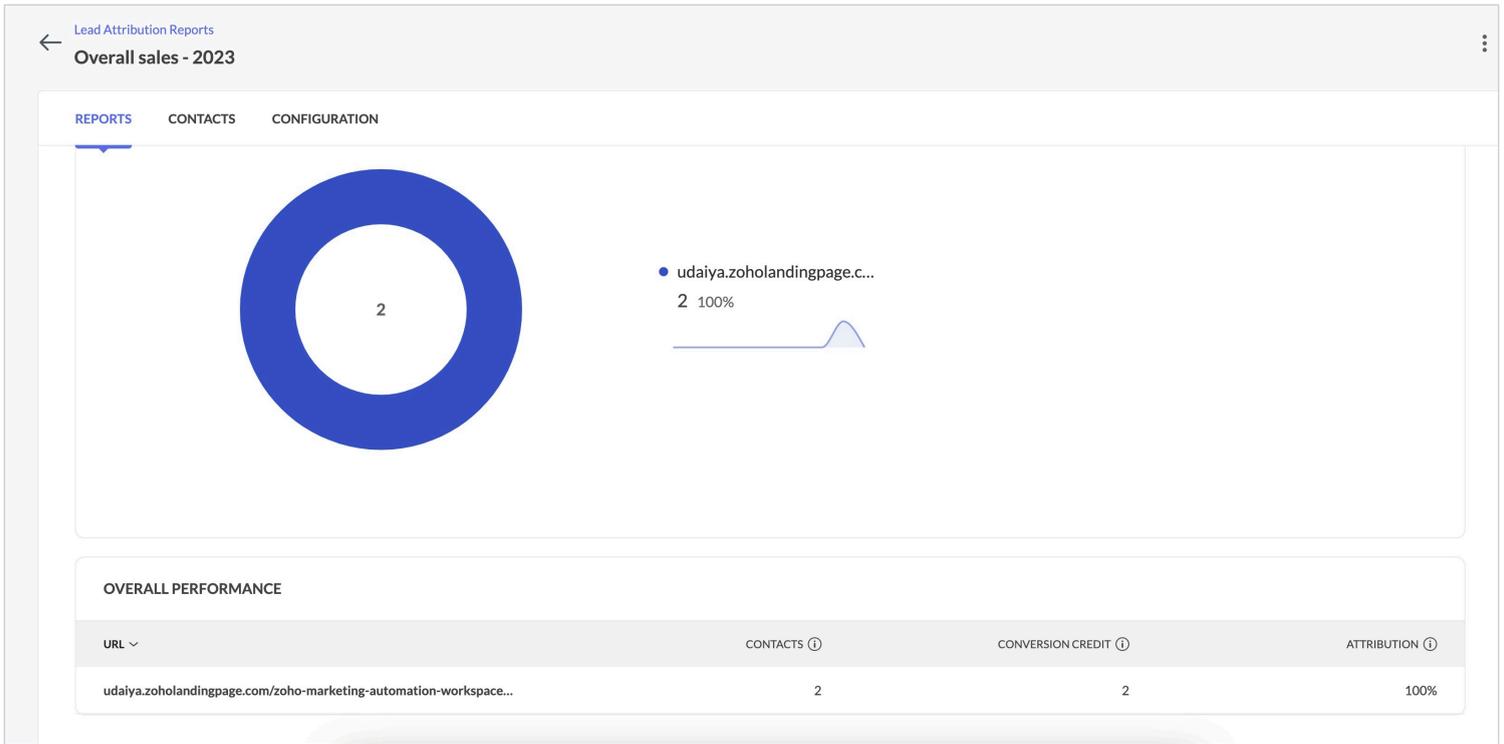
Create and Proceed

Detailed view

Once you've created the lead attribution model, you will be taken to the detail view page of that report. You can also view reports by clicking the lead attribution report you've created under **Contacts -> Lead Attribution -> name of the report**.

Report

You can view the overall performance of the sources and URLs (depending on the dimension you chose) under this tab. You can see the data represented in a donut chart and a table.



Contacts

You can view the contacts that fell under the configured lead attribution report in this tab. You can **create a segment** using the Segment filter, **customize field display** and **refresh** the tab by clicking the respective icons in the *top-right corner of the tab*.

Lead Attribution Reports
Overall sales - 2023

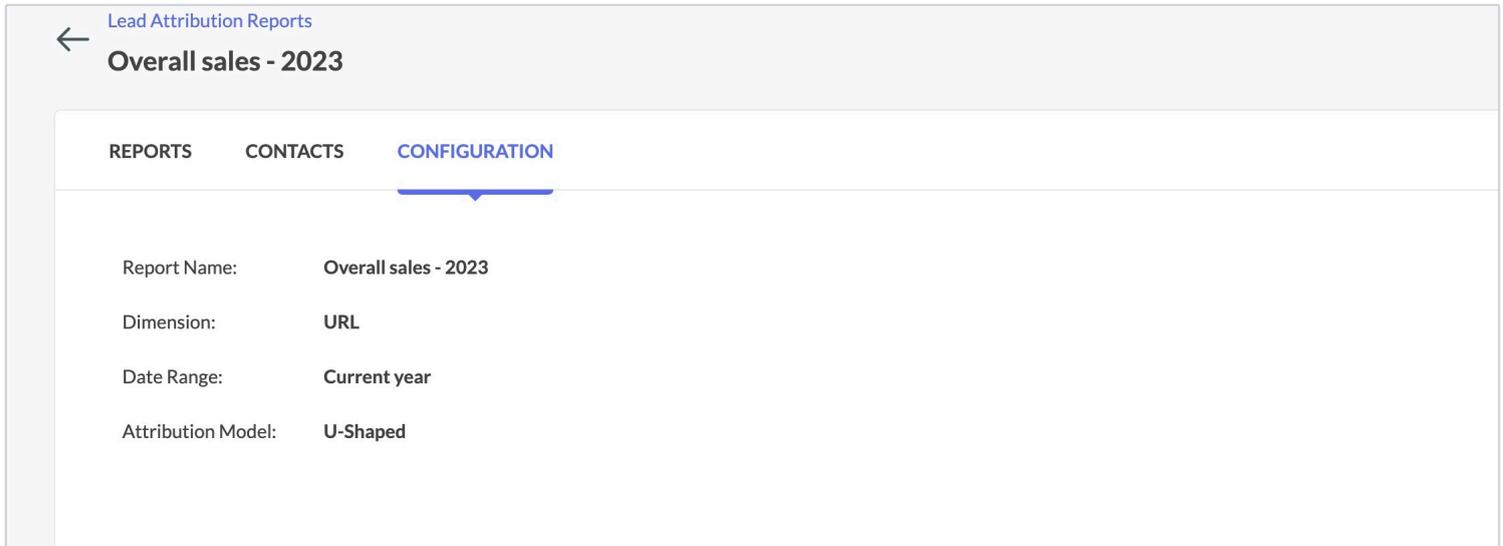
REPORTS CONTACTS CONFIGURATION

7 Contacts came via this lead attribution.

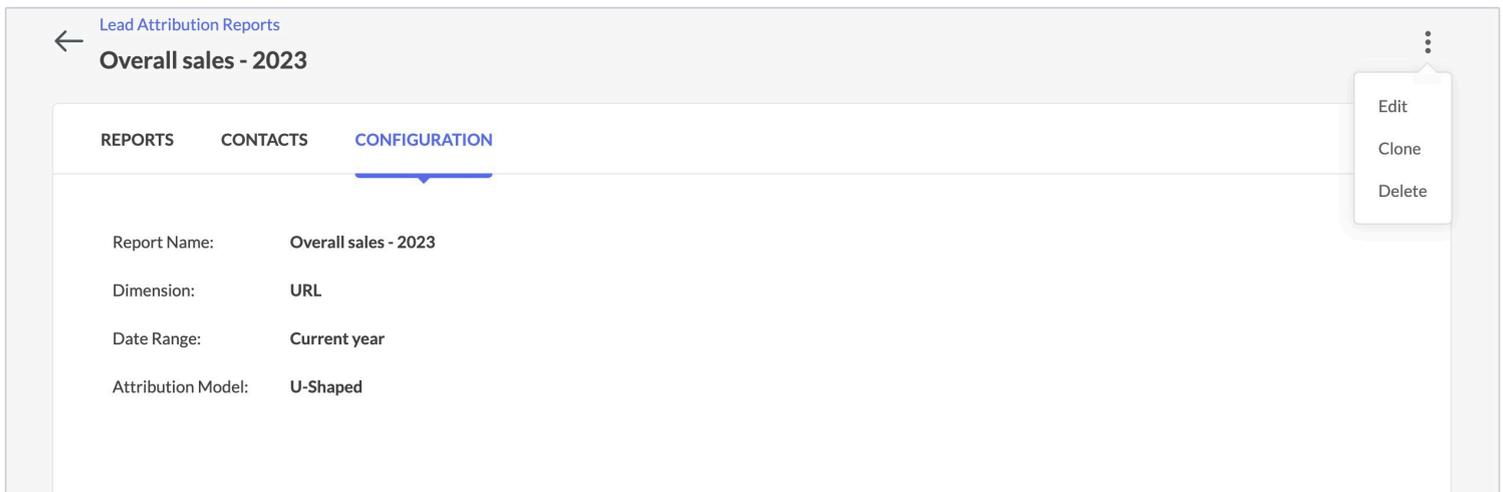
CONTACT EMAIL	FIRST NAME	LAST NAME
<input type="checkbox"/> abilas@zoholandingpage.com	-	-
<input type="checkbox"/> hani@zoholandingpage.com	-	-
<input type="checkbox"/> narmat@zoholandingpage.com	-	-
<input type="checkbox"/> raja@zoholandingpage.com	-	-
<input type="checkbox"/> senti@zoholandingpage.com	-	-
<input type="checkbox"/> ud@zoholandingpage.com	-	-
<input type="checkbox"/> udaiy@zoholandingpage.com	-	-

Configuration

You can view the lead attribution report's configuration detail in this tab. This includes all the data you've given in the creation page.



What actions can be performed on the lead attribution reports?



- **Edit** - Click the **More Actions** button in the respective lead attribution report detail view and click Edit.
- **Delete** - Click the **More Actions** button in the respective lead attribution report detail view and click Delete.
- **Clone** - Click the **More Actions** button in the respective lead attribution report detail view and click Clone.