

10 Tactics for Building an Effective Attribution Management Program

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The Demystified logo consists of a small icon of three vertical bars of increasing height to the left of the word "DEMYSTIFIED" in a bold, uppercase, sans-serif font.

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OVERVIEW

Many organizations today silo their marketing investments: paid search is the responsibility of the search team; display media is run through the digital media team (and both are often outsourced); the website itself, including its optimization for SEO and for on-site user experience and conversion, is owned by the content team; email marketing is managed by the direct marketing team; and TV is run by the broadcast team. Each group must “defend” their own portion of a joint marketing budget each year, using the data they have from channel-specific analytics platforms to demonstrate both the value they’re delivering to the business, as well as the steps they have taken to optimize efforts within their channel.

At the same time, marketers know that effective marketing must be aligned and holistic across channels. The recognition of this imperative drives content and timing coordination in the planning stages of each campaign, but, all too often, does not carry through to the outcomes of those coordinated efforts. CMOs know that interaction effects are real, but when faced with disparate data sources and disparate timing of data availability, they often fall back to channel-by-channel, siloed evaluations of the results, making adjustments to the overall media mix informed more by gut and instinct than by hard data.

Companies that embrace Data-Driven Attribution gain a significant advantage over their competitors who are relying on last click or simple rules-based attribution approaches. However, simply purchasing an attribution performance management platform does not automatically and immediately deliver cross-channel spend optimization. Your platform is a critical and foundational component, certainly, but it is still only a single piece of an effective attribution management program. The implementation of the technology itself requires coordination and cooperation across organizational silos: getting access to domain expertise within each impacted organization, ensuring that usable data is being captured (which often requires both technical and operational process updates), and ensuring that the results from the platform lead to appropriate action.

This white paper, sponsored by Adometry, describes some common pitfalls when it comes to the change management required to successfully implement a Data-Driven Attribution program, and more importantly, provides guidance on heading off those pitfalls before they come to pass.

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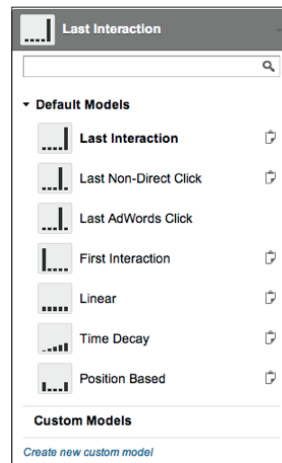
ADVANCED ATTRIBUTION GOES BEYOND THE LAST CLICK

Attribution itself is not a new concept. Web analytics platforms, for years, have provided marketers with the ability to track the sources of traffic to their sites, and then to track, by source, how many conversions (orders, leads, etc.) occurred. This tracking can be very specific – down to the specific link in an outbound email and down to the specific creative, size, and placement of a display ad. But, this approach, historically, had a critical flaw, in that it credited each conversion entirely to the last marketing channel the consumer used before converting. “Last click” attribution ignores the prior visits the consumer made to the site when she was doing research and building the confidence needed to, eventually, return to the site and purchase.

As a response to marketers’ realization that this last click approach was overly simplistic, web analytics platforms introduced the ability to track and analyze visitors across multiple visits, including which channels drove them to the site each time.

While this cross-session visibility is a step in the right direction, it is not as complete a solution as Data-Driven Attribution, either, for two reasons:

1. It tends to exclude off-site impressions (even if the site includes media tracking tags, the data these tags collect is seldom integrated with the web analytics platform)
2. It still requires the marketers to choose or create an “attribution model” based on their own intuition or beliefs. For instance, the figure below shows the default attribution models from which Google Analytics users can choose:



Advanced attribution does not require “choosing a model” at the outset of the analysis. Rather, the data itself is used to build a true analytical model. In the case of Adometry, for instance, this is achieved by capturing all of the permutations of cross-session / cross-channel activities at the granular user level. Then, different sequences of activities are compared. If, for instance, one set of users has a series of activities (impressions and clicks) that were captured as $A \rightarrow B \rightarrow C \rightarrow D$, and another set of users had a series of activities that were captured as $A \rightarrow B \rightarrow D$, then the results of the first path can be compared to the results of the second path, and the difference between the two can be attributed to “C.” This, obviously, is a simplified description of a complex algorithmic approach, but it illustrates that there is no predetermined weighting of each channel – first click, last click, linear, or other – in the process. And, it illustrates that this is an approach that truly provides the “truth” as to the contribution of each channel to the business results that matter.

THE WHO, WHY, AND WHAT OF THIS WHITE PAPER

Change management itself is nothing new, even if the specific characteristics of the changes required for attribution management are. The ten tactics described in this white paper are broken down into four categories and cover a range of non-technical pitfalls that are easily avoided with upfront planning and communication.

MANAGE EXPECTATIONS AND EDUCATE STAKEHOLDERS

1. **Gain alignment on what success looks like** – early on, and through collaboration with internal stakeholders and the solution provider, crystallize what program success looks like. Break it down into two questions: 1) What do we expect the program to do that will improve our results? and 2) How will we know (measure) if it's doing that?
2. **Gain alignment on primary attribution metrics** – different marketing channels measure, report, and optimize using different metrics, but part of the benefit of the Data-Driven Attribution program is that "results" will be measured using a common set of metrics. Conducting an audit of the existing metrics used in each channel and then collaboratively establishing a limited set of attribution metrics that each channel owner is on board with, increases the post-launch acceptance of the results.
3. **Ensure the methodology is well understood** – it is human nature to be skeptical of things we don't understand. Educating stakeholders so that they recognize that the power of attribution management comes from a complex, but comprehensible, approach, rather than from magic goes a long way towards turning passive and skeptical stakeholders into vocal advocates.
4. **Ensure an understanding of the realities of data capture** – attribution management platforms are not Omniscient, so there will be data that is simply not available. Being open about what will and will not be included in the initial rollout, as well as clearly educating stakeholders that the goal is actionable attribution rather than perfect attribution prevents the program from being undermined.

AVOID PITFALLS IN THE TECHNICAL IMPLEMENTATION

5. **Bring in IT well before the contract is signed** – your IT organization will be involved in the implementation of the program, and they bring valuable knowledge as to how and where your data lives and how it can most effectively be integrated into the program. Engage the right members of the IT organization early and often, and the implementation and on-going maintenance will go much more smoothly.
6. **Expect to modify your existing data sets** – while you are already capturing data from your web analytics platform, from your paid search platform, from your media platform, and numerous other places, you will still need to make adjustments to these platforms and, in some cases, update things such as the tags on your site. Work with your provider early to identify where these updates will have to occur, and engage the appropriate parties as early as possible to get those updates in place.

ENSURE THAT RESULTS LEAD TO ACTION

7. **Engage channel owners early and often** – Data-Driven Attribution shifts the way an organization understands its marketing mix, which can be unsettling. Involving channel owners throughout the implementation – encouraging questions and asking for input on implementation decisions – and regularly assessing the skepticism level of each of these stakeholders will enable you to proactively engage them and address their concerns.

8. **Establish a process for taking action** – ultimately, the program only has value if it leads to action. Develop possible scenarios – using sample deliverables that match what will be available after the implementation is completed as much as possible – and work through them with your stakeholders: Who would take action based on these results? What action? When?

COMMIT TO ON-GOING MAINTENANCE OF THE PROGRAM

9. **Establish a data governance plan for the program** – while there will be an initial push to get all of the data flowing to the platform for the initial launch, data sources will evolve over time. Formalizing the governance of the data – where it lives, how it is integrated, what will trigger changes, how those changes will be communicated – early on minimizes the chance that the data will suddenly “break” at some point down the road.
10. **Establish regular program results readouts** – implement a mechanism, with staff accountable for managing it, for concisely summarizing the performance of the program on a recurring basis, including both the success measures established at the outset, as well as the specific actions that have been taken based on results from the program.

The rest of this paper digs more deeply into each of these topics. Like Data-Driven Attribution itself, these tactics are not magic, but they require a level of focus, planning, and communication to effectively implement.

MANAGE EXPECTATIONS AND EDUCATE STAKEHOLDERS

Experienced IT professionals know that expectation management is a critical factor in any technology deployment. Be it a CRM platform, a data warehouse, a web analytics platform, or a tag management system, any significant investment in technology can get oversold to justify the cost. Unrealistic expectations abound all the way from the C-suite to the analysts: “every internal frustration that falls within a 100-mile radius of the platform will instantaneously vanish once the new system is turned on!”

This expectation is seldom met. The size of the gap between unrealistic expectations and reality is directly driven by how clearly and how often project owners manage expectations from before the final purchase order is signed until the day of the rollout.

Effective expectation management requires explicit planning and nuanced communication: engaging the right stakeholders at the right time, aligning early on what program success looks like, and educating them on the realities of the platform.

TACTIC 1: GAIN ALIGNMENT ON WHAT SUCCESS LOOKS LIKE

Attribution management is a powerful weapon for your arsenal, but it is not the entire arsenal in and of itself. The more clarity and consensus you establish at the outset as to which targets the platform is aiming for, as well as when those targets can reasonably be expected to be bulls-eyed, the better.

The best way to gain and maintain alignment is by clearly establishing what success looks like – establishing a limited set of objective and quantifiable measures with targets established for each one up front. This is often easier said than done. When faced with uncertainty – a new way of thinking about attribution, relying on data from a platform that has not yet been implemented at the company, with many internal eyes on the effort – human nature is to shy away from specificity: “There are too many unknowns! I can’t set a target for success metrics until I actually see how this plays out!”

This reaction is both common...and flawed. Someone made (or is making) a purchase decision because she expected that it would deliver a positive return on the investment. The trick is capturing and codifying what that expected value actually is, which is often not clearly articulated and captured.

One tactic for establishing clear, meaningful success measures is to break the exercise down into two steps: answer two questions, codify the answers, socialize them, and then regularly reiterate them throughout the program implementation. The two questions are:

- 11.** What do we expect attribution management to do to improve our results?
- 12.** How will we know we're achieving that?

The answer to the first question is (should be!) the elevator pitch that got the attention of the purse string holders in the first place. It is the articulation of the value proposition for the program that any C-level executive or board member would "get."

Some possible answers to this first question are:

- Quantify the contribution of each marketing channel to financial results so that we can adjust our media mix to improve the efficiency of our overall spend
- Objectively measure the lift and contribution of each channel for each campaign to end internal debates as to whose spend gets credit for what results
- Validate our suspicion that we are undervaluing the contributions of some or our digital efforts and overvaluing the contributions of others. If our suspicion is right, we will be able to adjust how we invest our marketing dollars.

PRO TIP



Avoid the temptation to make this an overly broad and lofty visionary statement. That's the job of your provider's sales team. Rather, make this a statement – a goal – that is clear, concise, and achievable in the near term.

Given what you are trying to achieve – in non-metric-based, but clear and specific terms –the second question is a direct follow-up: how will we know if we've done that? The answer to this question addresses the specific ways that progress toward that goal will be quantified. In a perfect world, this measure would simply be a hard ROI, and the target would be to exceed the company's hurdle rate. Unfortunately, we don't live in a perfect world.

So, to develop measures, take a good, hard look at your answer to the first question – your goal statement. What will be the best available measures – quantitative and qualitative – to determine whether the program is successful or not?

If your goal was to end internal debates, then a survey of stakeholders before and after (and, possibly on an on-going schedule) to ask their confidence in their own and their peers' reported results would be an appropriate measure.

If your answer to the first question was that you would be adjusting your media mix, then you may need several measures:

- Is data from the attribution management program a significant input to paid media planning (determine how you will solicit this information up front!)?
- Is there an expected lift in overall results (spend vs. results)? How will that be measured? And, what is the historical baseline (including the historical variability) such that a reasonable target can be set for the new program? (A target must be set!)

These questions need to be answered with as much clarity and specificity as possible. If the answers are indistinguishable from the marketing copy on the provider's website, then specificity is lacking.

PRO TIP

Work with your attribution management provider and get buy-in from key internal stakeholders as early as possible. Ideally, formalize and document this alignment before the purchase order is even issued. Barring that, ensure you have this alignment before or immediately following the project kickoff.

Review your answers with your attribution platform provider (ideally, review them with more than your sales executive: your account manager, the implementation lead, the project manager, etc.). Get their input. You need to come to an agreement as to what is reasonable to expect (and by when), which will automatically trigger discussions as to what factors are beyond the solution provider's control that you will have to own.

This is not an adversarial exercise. You want to be successful, and a true attribution partner wants you to be successful. Clearly articulating what "success" is at the outset focuses the entire implementation team, sparks internal and provider discussions as to what the program will (and will not!) realistically do, and ensures alignment throughout the implementation and into on-going management of the program.

TACTIC 2: GAIN ALIGNMENT ON PRIMARY ATTRIBUTION METRICS

Your display media team reports their results as Effective Cost Per Acquisition or Conversion (eCPA). The paid search team shows how they've been optimizing their spend based on Return on Ad Spend (ROAS). The social media team reports results as cost per follower and cost per interaction. Each marketing silo uses a different metric – calculated in different tools using different methodologies – to report results.

For the attribution management program to be successful, you need agreement on a limited set of attribution metrics at the outset. Otherwise, channel owners can (and will) critique the results because the program does not use "their" success metric.

Alignment on the primary attribution metrics requires both communication and compromise that starts with a meta analysis of the existing metrics each channel uses. This means you need to:

- Identify each channel's current key metrics
- Capture the definition of each metric and how, specifically, the metric is calculated
- Document the data sources for each metric

Channel	Owner	Key Metric	Data Source	Details
Google Paid Search	Jane Smith	ROI	Google Adwords & Google Analytics	Actually reporting ROAS: (PPC revenue - PPC spend)/(PPC Spend)
Organic Search	Fred Jones	Total Revenue	Google Analytics	Revenue reported by GA for organic search (owner unsure how this gets attributed)
Display Ads	Tom Doe	ROAS	DFA	(Revenue - Spend)/Spend
Facebook Ads	Tom Doe	Cost per Click	Facebook Ad Manager	Reported by Facebook platform. Not tracking to conversions because ads don't consistently include campaign tracking.
Promoted Tweets	Tom Doe	Cost per Engagement	Twitter Ads	Reported by Twitter platform. Not tracking to conversions because some promoted tweets aren't driving to conversions.

Once you have a consolidated set of metrics – and the channel(s) where they're used – conduct an analysis of the metrics themselves:

- Which metrics are defined similarly (even if they have different data sources)?
- Which metrics are most closely linked to business (financial) impact?
- Which metrics are complete outliers (and why are they outliers)?

PRO TIP

While a bias toward metrics that are closely linked to financial impact is warranted, this should not be to the exclusion of non-financial metrics. Your social media strategy, for instance, may focus on upper funnel results. A true Data-Driven Attribution methodology will account for this.

This analysis will directly inform your recommendation for a short list of primary attribution metrics. And, the stronger the agreement of all of the channel owners that these metrics make sense, the greater the acceptance of the results of the program will be.

TACTIC 3: ENSURE THE METHODOLOGY IS WELL UNDERSTOOD

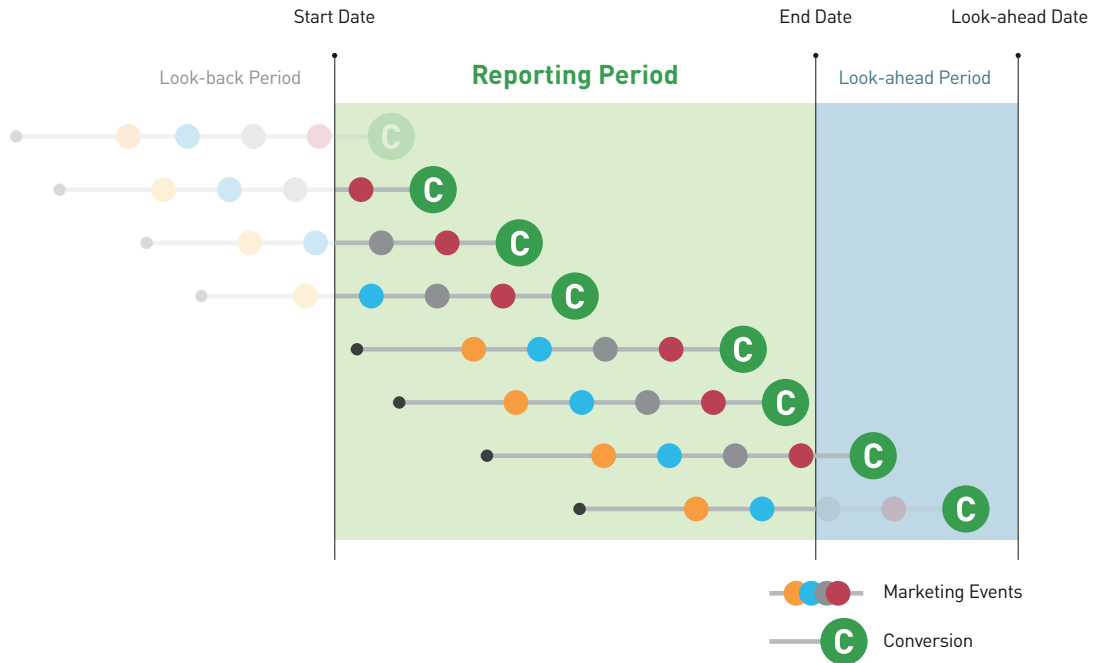
Attribution management introduces a more accurate approach for understanding how each of your marketing channels contribute to the bottom line, but this new methodology is not simply a matter of an “old truth” versus a “new truth.” Paid search delivered results in your old way of measurement, and it will deliver results in your new way of measurement. But, the new way captures the value that can be attributed to paid search while recognizing and factoring in that it affects and is affected by other channels.

The best way you can educate your stakeholders in this new way of thinking is to help them understand the underlying methodology – not necessarily the detailed algorithms and analytics embedded in the platform, but, rather, the core mechanics of Data-Driven Attribution management.

This education has the added benefit that it helps the team understand that, unlike many new solutions the company has launched in the past, the attribution platform cannot deliver results immediately on the day of the launch. This is due to the nature of the methodology necessary for any Data-Driven Attribution solution to deliver meaningful results. Some channel owners will get this concept immediately when you point out that they already deal with this in their individual silos: the paid search team is used to seeing their historical results change over time because Google Adwords (correctly) ties conversions to the date of the ad impression rather than the date of the conversion; and the digital media team knows they have set a 14-day lookback window for their conversion window, so their historical results, too, change over time. But, for much of the organization, this concept is both foreign and seemingly contradictory to the power of “real-time data.” Marketers desperately want a quick and simple answer, but the reality of the purchase cycle requires patience.

When the program launches, as well as when each subsequent analysis period closes, you have to wait for the impact of the different marketing activities to reasonably play out to avoid results that mimic your current last event measurement methods. This fact needs to be clearly and continually communicated throughout the implementation, using tactics such as:

- Emphasizing the “Initial Results Date” in the project status updates rather than the “Implementation Date”
- Including a clear and concise explanation of the need to wait for the full impact of marketing activities to play out in communications to stakeholders
- Using existing stakeholder terminology (e.g., “lookback window,” “conversion lag”) to explain the ramifications to the program reporting cycle



While the need for a time delay – that has nothing to do with the ability of the platform to collect or process the data and everything to do with the reality of consumer behavior – is not a difficult concept, you cannot assume that stakeholders will intuit it on their own, and you cannot assume that a single reference to it in the kickoff meeting or a program status update will be enough to make it stick.

TACTIC 4: ENSURE AN UNDERSTANDING OF THE REALITIES OF DATA CAPTURE

PRO TIP

Advanced attribution management solution providers are constantly improving their techniques for closing the loop and integrating more and more marketing touch points. Ask your provider what is on their roadmap so you know which scenarios are “coming soon” as opposed to which ones are far down the road.

For any brand that is not a pure play online retailer, the “purchase path” often ends offline, and the final transaction may or may not be reasonably tied to a specific user in the brand’s database. Even for pure play online retailers, consumers may engage with the brand through multiple devices, and they may engage in ways that cannot feasibly be tied back to the online activity.

Consider the claims that the marketers at leading attribution management solution providers include in the copy on their sites (emphasis added):

“Our cross channel marketing attribution software ... drives improved business results across your *entire marketing ecosystem*.”

“By bringing *all the media* together – both offline and online – [we] provide deep insights...”

“[We provide a] complete lens into the customer journey and purchase path across *all* paid, earned, and owned digital media.”

MEDIA MIX MODELING AND ADVANCED ATTRIBUTION

There is a convergence of sorts happening between media mix modeling – which, historically, has relied primarily on aggregate spend and results – and attribution management – which, historically, has been limited to person-level data. The former has been around much longer, but is inherently a blunt instrument with a substantial time delay in getting results. The latter is much more granular and detailed, and the data is captured through automated feeds, but is inherently incomplete. As such, these two approaches and technologies are complementary, and some providers, including Adometry, are actively working to bring them together to provide an even more complete picture of the links between marketing investments and business results.

These statements are not necessarily wrong, but, if taken at face value, buyers can be forgiven if their expectations are a bit misaligned with reality. Marketers may assume that these platforms have a magical secret for capturing and incorporating the entirety of their exposure to consumers:

- Print ads
- Out-of-home advertising
- Radio
- TV
- Earned media coverage
- Private Facebook posts referencing the brand
- The brand's customer service activities
- The brand's customer loyalty programs
- Etc.

The best attribution providers can provide solutions for tying in these external data sets, but no attribution management platform can violate the laws of physics or fundamental privacy expectations. While your attribution solution can tie these data sets into your program to make them more actionable, it is up to you to ensure that the data set exists somewhere in your ecosystem.

Likewise, you need to ensure that stakeholders understand the practical reality of what data will be included in the initial rollout, the quality and completeness of that data, and the actual scope of the “marketing ecosystem” that is within the scope of the program. Otherwise, as soon as the initial results are reported, someone will point out (often, in a public forum) the data that is not included in the platform's model. It is up to you as to whether everyone else in the room simply nods a, “We already understand that and are not alarmed in the least,” or whether jaws drop and panic ensues.

Like many of the recommendations in this paper, this one comes down to clear and frequent communication. Communication needs to clearly articulate what data sources will be included in the initial rollout, what data will be included in subsequent planned phases, and what data is simply not captured. This should not be a “gloom-and-doom” education of the stakeholders. Rather, it needs to be a deliberate articulation of the overall plan:

- Illustrating where the company is spending money on marketing next to the channels that are/are not being included (showing that “X% of current marketing spend is included”)
- Explaining the difference between perfect attribution and actionable attribution – the latter is feasible and cost-effective, while the former is unattainable

You can also use this communication to get buy-in from stakeholders who manage offline buying channels to illustrate the importance of tying purchases back to the online-captured touch points to make the model as useful as possible.

AVOID PITFALLS IN THE TECHNICAL IMPLEMENTATION

The technical implementation of your attribution management platform is where much of the initial legwork will occur. And, because attribution management providers are first and foremost providing technology solutions, you and your stakeholders likely understand and expect that there is some degree of technical work required. Nonetheless, the specifics of that technical work, and determining who to involve and when, is critical to identify, understand, and plan for at the outset.

TACTIC 5: BRING IN IT WELL BEFORE THE CONTRACT IS SIGNED

Your IT organization is a crucial player when it comes to capturing complete and accurate data for the attribution management program, as well as for maintaining data feeds over time. Many an analytics implementation has hit rough seas when the marketers making the purchase decision gleefully assumes that there is “no” or “minimal” IT involvement required to implement a new solution. Mid-way through the implementation, when these assurances turn out to have been rosily optimistic best case scenarios...someone places the call to IT. And often, that is the first that the IT organization has heard of the effort. The IT organization then has to watch a scenario play out that they have seen many times before: they were not involved up front...and yet become the excuse for why the implementation is delayed when technical realities are introduced at the eleventh hour. ***Do not do this to yourself or your IT organization!***

PRO TIP



While many of the recommendations in this paper have a component of “it depends” in them, this is not one of those recommendations. IT should be part of the evaluation team during the platform selection process. Ensuring that the IT management team understands why you are exploring attribution management systems and the high-level basics of how it works is key to getting the right representation on the team.

Every organization is unique, and IT is the group that has both a deep understanding of how bits and bytes fly around the internet, as well as what unique solutions are in place at your organization to keep those bits and bytes from crashing. When and how you bring IT into the discussion can be the difference between a 6-week implementation and a 6-month implementation. It also can be the difference between whether “attribution management” is a groan-inducing phrase for technical staff (“THAT thing is a total headache!”) or the keys to a willing partnership (“This is a platform that we support that *really delivers business value!*”).

Ensure that, at various checkpoints during the evaluation and subsequent implementation planning, you explicitly solicit IT’s input:

- Is it clear to you how this implementation will work and where and how we will be collecting the data?
- What concerns you about the implementation? What risks do you see?
- Are there specific groups/teams within IT that this effort will impact that we should bring in sooner rather than later?

Regardless of your current relationship with IT – smooth, rocky, or somewhere in between – their willing participation from evaluation through implementation and to on-going maintenance will be an essential contributor to the success of the program.

TACTIC 6: EXPECT TO MODIFY YOUR EXISTING DATA SETS

Your IT organization is likely getting tired of adding tags to your site in order to complete your data sets: web analytics tag, media tags, voice-of-the-customer (site survey) tags, a tag management system to manage all of these tags without having to make site updates, and so on. Unfortunately, there is no easy way around this: updates to the site to collect data that can readily be leveraged by the attribution management platform will almost certainly be required. Even if you are using a log file approach to implementation and are leveraging existing data sets from your ad servers and

search management systems, you still need to ensure that those systems have a complete set of data collection methods in place to capture the full marketing and purchase path.

This doesn't mean that a discussion of what data is already being collected, how it is being collected, and whether that data, too, should be fed to the platform isn't in order. It is. Unfortunately, scrutiny often reveals that your existing data collection is not as robust or as accurate as the people who rely on it assumed it to be. This is a regular and unpleasant side effect of any marketing measurement program deployment. But the end result is better data, so it's all a matter of perspective!

You may face some resistance to adding and updating data inputs and systems to obtain a complete data source. This is another reason that early and frequent engagement with and education of the full range of stakeholders is essential. Rather than knocking on the door of the head of the front end development team and surprising her with a request to make some "quick" tagging updates to the site or a last minute pull of a large data set – on short notice – you will have a partner who understands what data is needed, where that data must come from, and what is required to capture the data effectively. At the same time, you will be scoping that out with sufficient lead time that your development resources aren't squeezed for time to pull off the changes.

ENSURE THAT RESULTS LEAD TO ACTION

Once your attribution management platform is implemented, data is flowing in, and the platform is returning results, can you consider the program a success? Not yet! ***The only way for the program to truly be successful is if the data from the platform triggers appropriate action.*** This should go without saying. But, all too often, it goes unstated and is assumed...then actual action winds up being sporadic and haphazard.

To ensure that the program leads to success – by successfully triggering appropriate actions – requires both up front planning and an on-going process for driving action based on the results.

TACTIC 7: ENGAGE CHANNEL OWNERS EARLY AND OFTEN

We've already discussed that the owners of each individual marketing channel are key stakeholders for your program. And, it is a near certainty that the first round of results from the program will dramatically shift the organization's understanding of the company's marketing channels and how they work together. Some channels will almost certainly stand out as having had, historically, overstated results. Human nature for these channel owners will be to go on the defensive: dismissing the methodology as flawed, criticizing the metrics used for attribution (described earlier), or generally naysaying the entire effort.

Knowing that such a response is a natural reaction, but not knowing who will have that reaction, means you need to work doubly hard up front to build collaboration and trust among the key stakeholders. Encourage them to ask questions, and seize any opening to provide education on how the platform works. Ask for their input on key implementation decisions. Use group meetings, certainly, but conduct one-on-one follow-ups with anyone who expresses hesitation or concern. Most importantly, change how each channel owner is held liable for marketing success. If they are still tied to the "pre Advanced Attribution" metrics, of course there will be pushback.

In many respects, this is Change Management 101, but that does not make it any less important. Unfortunately, it is an area that often gets skipped. “Regular communication” can be captured in a project plan, but the added nuance of actively engaging and building trust is harder to build a formulaic prescription.

Including a “Stakeholder Alignment and Buy-in” agenda item for every core team meeting is one way you can ensure this inherently fuzzy concept leads to tangible activity. Specifically, consider throughout the implementation:

- Which stakeholders seem to be skeptical or unengaged with the program (regularly missing meetings with an, “I trust you guys” email can be a red flag that indicates the exact opposite!)?
- What tactics can be used to address those stakeholders? Who should follow up with them and how (grab lunch, schedule a formal meeting, etc.)?

As with any program, the biggest skeptics represent an opportunity to some of your strongest advocates.

TACTIC 8: ESTABLISH A PROCESS FOR TAKING ACTION

Just as it is easy to get focused on the “implementation date” to the detriment of the “initial results reported” date, it is easy to focus on the “initial results reported” to the detriment of “taking action based on the results.”

This is not unique to attribution management. Many web analysts could comfortably retire if they were given a nickel for each actionable analysis they presented that, six months later, had never been acted upon. But, while you have had web analytics running on your site for years, attribution management is a new program, a new system, and a new opportunity to drive to action by collaboratively playing out scenarios with the channel owners to develop plans for action even before data is available.

To make these plans meaningful, and to ensure stakeholders are engaged with them, frame them as requirements gathering:

“While we are currently working to get the technology in place and properly configured, this is a program and part of our mandate is to ensure that we have the right people and processes in place to actually put the results from that technology to use. We know what types of results we may get from the technology, so we want to walk through with this group [the channel owners] to ensure that you will have what you need to take action if they play out. This may also actually affect our technical implementation, so it’s better for us to determine that now than to wait until after we’re looking at the first round of results.”

These discussions need to be planned well in advance of the delivery of the initial results. Alignment on the primary attribution metrics (discussed earlier) should already be complete, and the stakeholder group should already have collaborated enough on the program that they have some level of trust and a spirit of collaboration around the effort. At that point – during your training with your provider – ask these questions:

- What action would we take if these were the results we saw?
- Who would take the action?
- What steps would they need to take – and what additional information would they need (from the attribution management platform or not) – to take that action?

PRO TIP

Explore multiple scenarios, focusing on scenarios that the core team feels are at least probable, and save the scenarios that would impact the least-supportive / least-engaged stakeholders for the end. This sequencing will let the more skeptical stakeholders get comfortable with the process before the scenarios the team reviews fall on their turf.

- When (how quickly) would they be able to act?
- How will we communicate changes to our attribution management platform so we can track results?

Obviously, this exercise is a delicate process. But, it both makes the program “real” for the stakeholders early enough that they have time to digest and process the ramifications, and it provides the basis for an action plan once initial results are reported.

COMMIT TO ON-GOING MAINTENANCE OF THE PROGRAM

In a dynamic marketing environment (which is the environment in which all marketers now operate), the only thing that is constant is change. And, with change, comes the opportunity for unintended consequences to “break” the system. As such, the attribution management program does not end with the implementation of the platform or with the delivery of the initial results. You have to commit to on-going maintenance, both to maintain the technical aspects of the platform and to maintain the visibility and use of the results of the platform among all stakeholders.

TACTIC 9: ESTABLISH A DATA GOVERNANCE PLAN FOR THE PROGRAM

Data governance, while not exactly the sexiest aspect of attribution management, is a critical component of the overall program. During the implementation, you will be immersed in the details of making the current data being captured work and getting through the initial quality assurance (QA) process. What you may overlook is the reality of how those data feeds will evolve over time. Then, within a couple of months of the initial launch, something will break in the data. The root causes can vary:

- The company changes search agencies, and the new agency isn’t instructed to maintain a data feed to the attribution management platform
- The DSP used by the media agency gets updated, and the format of the data feed changes
- The company’s site gets a major redesign, and attribution management tags inadvertently get dropped from the new templates

Or, several months after the launch, a new data feed – a new type of campaign or a new channel – gets implemented, but no one thinks to determine if and how it should be included in the attribution management program.

These are just a few of the possible (likely) risks of not having some level of formalized data governance for the program. If your organization already has a formalized data governance role, then, by all means, work with those owners to incorporate the attribution management program into their scope. This will require documentation (of definitions and data sources) and process integration to establish processes for monitoring data quality and completeness, as well as to identify existing processes in the company that need to be updated to include a tie-in / consideration of attribution management.

TACTIC 10: ESTABLISH REGULAR PROGRAM RESULTS READOUTS

The “out of sight, out of mind” adage applies to attribution management as much as it applies to other non-customer-facing platforms and programs. The excitement and curiosity leading up to the initial implementation and the first report of results will quickly fade without a plan for on-going reminders of the program’s existence, purpose, and results.

Instituting a “program results readout” as a recurring communication serves two purposes:

- It ensures the program remains top-of-mind for all stakeholders
- It gently holds stakeholders accountable to the imperative that they take action based on the data

Your program readouts can be incorporated into existing meetings or communications. Time them to be monthly, bi-monthly, or quarterly, and commit to ensuring they are clear, concise, and impactful updates. These readouts, while related to the core reporting from the platform, are different, in that they emphasize actions and results rather than simply deep dives on the latest available data.

Regardless of the delivery mechanism, your readouts should include the following:

- The results of the program based on the specific success measures established at the outset of the program
- A list of the specific identified marketing actions resulting from the program with an indicator for each one: Open, In Progress, (Newly) Completed. Include in the list a single row for the number of completed actions since the program launch or, eventually, year-to-date
- For each of the completed actions that have been in-market long enough to capture results, include a succinct (one page, one slide) summary:
 - The result from the attribution management platform that triggered the action
 - The action taken, including who owned the action (this is a celebration, of sorts, of the stakeholders)
 - The results from taking the action
- Planned updates/enhancements to the program; this may include new channels or offline data being added or new types of analysis being planned
- Leave time for questions!

We cannot stress enough how important it is to be diligent both with the timing and the cadence of these readouts. Every page/slide in the readout should clearly stand up to the “So, what?” test. If the best response you can elicit is a shoulder shrug, then keep working on the content!

CONCLUSION

With increasingly squeezed marketing budgets, a simultaneous explosion of available channels for reaching and engaging consumers, and the reality that consumers interact with brands across multiple channels before making a purchase decision, successful marketers are increasingly looking to attribution management platforms to guide their investments.

While the platforms that have emerged are technically robust and sophisticated, the existence of the core technology is only one piece in the overall attribution management puzzle. That technology has to be implemented, and the results of the technology have to be used to drive action. This requires:

- **Casting a broad net when identifying “stakeholders”** – the implementation of the program requires IT involvement and channel owner buy-in, and the results of a successful program impact the entire marketing organization, so identifying the full range of stakeholders up front is essential.
- **Communicating early and often** – this paper has discussed a number of specific topics and issues that require discussion, education, and buy-in from stakeholders, and, the earlier the communication starts, the smoother these discussions will be.
- **Developing post-launch processes well before the launch** – evolving data feeds need to be maintained, and a process needs to be in place to ensure that each round of analysis from the platform leads to as many meaningful actions as warranted.

Developing your team to become one that has the experience, communication skills, technical knowledge, and enthusiasm to build a successful marketing measurement program can be a challenge, but it is a challenge well worth undertaking.

ABOUT THE AUTHOR

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ABOUT WEB ANALYTICS DEMYSTIFIED

Web Analytics Demystified, founded in 2007 by internationally known author and former Jupiter research Analyst, Eric T. Peterson, provides objective strategic guidance to companies striving to realize the full potential of their investment in web analytics. By bridging the gap between measurement technology and business strategy, Web Analytics Demystified has provided guidance to hundreds of companies around the world, including many of the best known retailers, financial services institutions and media properties on the Internet.

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