REPORTING & ATTRIBUTION ENGINE
PLAYBOOK LITE

ANALYTICS

CLOSED-LOOP MARKETING ANALYTICS
BUILT ON GA4 + CRM + LOOKER

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Reporting & Attribution Engine Playbook (Lite)

Objective

Deliver a closed-loop reporting system that ties spend → leads → pipeline → revenue. Eliminate vanity metrics, prove ROI, and guide investment decisions with confidence.

Step 1. Define Revenue Model + Attribution Rules

- Align with CFO/RevOps on **revenue definitions** (bookings vs. revenue, net vs. gross).
- Choose **primary attribution model** (W-shape for B2B, position-based for SMB) with GA4 + CRM mapping.
- Document **channel → opportunity mapping rules** (ads, content, events, email).

Step 2. Configure GA4 for Marketing Source Integrity

- Standardize **UTM structure** (Campaign, Source, Medium, Content, Term).
- Build GA4 **events + conversions** tied to business goals (form fills, demo requests, trial signups).
- Enable **BigQuery export** for downstream joins.

Step 3. Sync CRM for Pipeline Data

- Connect GA4/BigQuery to **CRM (HubSpot, Salesforce, Dynamics, etc.)**.
- Map **lead → contact → opportunity → revenue stages.**
- Ensure **Campaign IDs & UTM fields** persist in CRM.

- QA: Test sample leads to confirm source/medium/campaign carry into opportunity records.

Step 4. Build the Closed-Loop Data Model

- In **BigQuery/Looker**, join:
    - GA4 session & conversion data
    - CRM opportunity + revenue data
    - Campaign cost data (Google Ads, LinkedIn, Meta, etc.).
- Normalize to **Campaign** → **Lead** → **Opportunity** → **Revenue** flow.

Step 5. Design Executive Dashboards (Looker)

- **CMO / VP Dashboard:** Pipeline velocity, ROI by channel, CAC vs. LTV, time to revenue.
- **Demand Gen Dashboard:** Campaign ROI, conversion rates, influenced vs. sourced pipeline.
- **Sales/RevOps Dashboard:** Opportunity quality by source, deal cycle benchmarks.
- Build **drill-downs** from high-level KPIs into campaign-level performance.

Step 6. Establish Governance & Cadence

- Weekly: Review pipeline velocity & ROI with marketing + sales.
- Monthly: Optimize budget allocation across channels based on attribution insights.
- Quarterly: Reassess attribution model & update rules as business evolves.
- Document **data QA process** (spot-check leads, revenue reconciliation).

Deliverable

A fully operational closed-loop attribution engine producing **trusted dashboards** that tie every dollar of spend to pipeline and revenue impact. Lite version deployable in **6–8 weeks** with one analyst + one RevOps resource.

Step 1: Define Revenue Model + Attribution Rules (Execution Guide)

1.1 Align on Revenue Definitions

Objective: Avoid "dueling dashboards" between Marketing, Sales, and Finance.

Actions:

1. Convene a **Revenue Alignment Workshop** with CFO, RevOps, Sales Ops, and Marketing Ops.
2. Document:
    - **Revenue metric of record:** Booked ARR vs. Recognized Revenue vs. Cash Collected.
    - **Pipeline definition:** Opportunity stage where Marketing influence is credited (e.g., Stage 2 = Sales Accepted Opportunity).
    - **Closed Won revenue inclusion:** New business only? Renewals? Upsells?
3. Write a **Revenue Dictionary** (1-page doc):
    - "Revenue" = Net New Closed Won ARR
    - "Pipeline" = Opportunities at Stage 2+
    - "Sourced" = First-touch lead originated by marketing
    - "Influenced" = Any opportunity with ≥1 marketing touch pre-close

Deliverable: A signed-off **Revenue Definition Charter** that all teams use.

1.2 Select Attribution Model

Objective: Agree on how credit is distributed across marketing touches.

Actions:

1. Present **Attribution Model Options:**
   - **Single-Touch:** First-touch or Last-touch (simple, directional only).
   - **Multi-Touch:**
     - Linear (equal split).
     - Time-Decay (later touches weighted more).
     - W-Shape (30% first-touch, 40% opportunity creation, 30% last-touch).
     - Custom (e.g., "hero moments" weighted).
2. Run a **model comparison test** on last 3 months of data (simulate in Google Analytics 4's Attribution reports or Looker Studio).
3. Select **Primary Model** (W-shape recommended for B2B SaaS).
4. Document **Secondary Views** for edge cases:
   - Content attribution (time-decay).
   - Paid media ROI (last-touch).

Deliverable: A **Marketing Attribution Playbook** (5 pages, visual examples of each model + rationale).

1.3 Document Channel → Opportunity Mapping

Objective: Standardize how marketing sources get tied to pipeline.

Actions:

1. Lock in **UTM governance** (see Step 2 playbook):
   - Required fields: utm_source, utm_medium, utm_campaign, utm_content, utm_term.

- Channel taxonomy:
    - Paid Search = utm_medium="cpc"
    - Paid Social = utm_medium="paid_social"
    - Organic Social = utm_medium="social"
    - Email = utm_medium="email"
    - Events = utm_medium="event"

2. Ensure CRM has **Campaign Object** with:
    - Campaign ID
    - Source/Medium mapping
    - Date range
    - Budget/spend
    - Expected ROI
3. Define **Source Hierarchy Logic** (example):
    - If utm_medium exists → take GA4 campaign source.
    - Else if CRM Campaign ID exists → map to parent channel.
    - Else if referral exists → "Referral."
    - Else → "Direct."

Deliverable: A **Channel Mapping Matrix** (Excel/Google Sheet):

CRM Campaign ID	UTM Source	UTM Medium	GA4 Default Channel Grouping	Final Channel	Notes

1.4 Establish Rules for “Sourced” vs. “Influenced”

Objective: Eliminate gray areas in reporting.

Actions:

1. Define **Sourced Opportunity Rule**:
   - Must have first-touch = Marketing channel.
   - Lead created by inbound form, paid campaign, event, or content syndication.
2. Define **Influenced Opportunity Rule**:
   - Any contact from Marketing channel tied to an opportunity **before stage 2**.
   - Example: Email nurture engagement, webinar attendance, ad click.
3. Decide whether to allow **multi-channel influence credit** (recommended).

Deliverable: A **Sourced vs. Influenced Policy Deck** (slide with examples of real opps).

1.5 Validate with a Pilot Test

Objective: Pressure-test before rollout.

Actions:

1. Pull last quarter’s closed deals.
2. Run **parallel reports**:
   - Finance report (actual revenue).
   - Marketing attribution report (GA4 + CRM).
3. Compare deltas → refine mapping rules until alignment within **<5% variance.**
4. Present back to leadership for final sign-off.

Deliverable: A **Pilot Attribution Report** (one-pager comparing Finance vs. Marketing view).

Step 1 Output

- A **Revenue Definition Charter** everyone agrees on.
- A **Primary Attribution Model** (W-shape baseline, alternatives documented).
- A **Channel Mapping Matrix** with source rules.
- A **Sourced vs. Influenced Policy Deck.**
- A **Pilot Report** proving alignment.

Result

Marketing's dashboards will be trusted in the boardroom. Finance, Sales, and Marketing see the same numbers, eliminating credibility gaps.

Step 2: Configure GA4 for Marketing Source Integrity (Execution Guide)

2.1 Standardize UTM Governance

Objective: Ensure every click can be tied back to its true campaign.

Actions:

1. **Define mandatory fields:**
   - utm_source = platform (google, linkedin, meta, etc.)
   - utm_medium = channel classification (cpc, paid_social, email, event, organic_social)
   - utm_campaign = initiative name (q3_enterprise_abm, product_launch_apr2025)
   - utm_content = ad creative / offer variant
   - utm_term = keyword (for search)
2. **Create a UTM Builder Sheet** (Google Sheet) with:
   - Data validation for consistent values.
   - Auto-concatenate URL builder.
   - Governance notes (e.g., no spaces, use underscores).
3. Train campaign managers: **"No UTM, no launch."**

Deliverable: A **UTM Governance Guide + Builder Sheet**.

2.2 Configure GA4 Events & Conversions

Objective: Track the right user actions tied to business value.

Actions:

1. In GA4 Admin → Events:
   - Configure key events: form_submit, demo_request, trial_signup, content_download, event_registration.
   - Mark high-value events as **Conversions**.
2. Add parameters to events (via GTM):
   - form_id, page_path, campaign_id.
   - Push UTMs into dataLayer on page load.
3. QA: Trigger each form/test action in staging, verify events fire in **Realtime GA4**.

Deliverable: A **Conversion Event Map** with event name, trigger, and downstream CRM mapping.

2.3 Implement BigQuery Export

Objective: Create a raw data lake for joining with CRM.

Actions:

1. In GA4 Admin → BigQuery Linking:
   - Connect GA4 property → BigQuery project.
   - Choose **Daily export** + streaming export if possible.
2. Validate: Confirm BigQuery receives tables: events_intraday_, events_YYYYMMDD.
3. Document schema:
   - Fields required: user_pseudo_id, session_id, utm_*, event_name, event_timestamp.

Deliverable: BigQuery Data Pipeline Schema (data dictionary + ERD diagram).

2.4 Clean Default Channel Groupings

Objective: Align GA4 channels with CRM and finance.

Actions:

1. In GA4 → Admin → Data Settings → Channel Grouping:
    - Customize defaults:
        - Map utm_medium=cpc → "Paid Search."
        - Map utm_medium=paid_social → "Paid Social."
        - Map utm_medium=email → "Email."
        - Map utm_medium=event → "Event Marketing."
2. QA: Run test clicks with UTMs and confirm attribution in GA4 acquisition reports.

Deliverable: A **Channel Grouping Policy Doc** with exact mapping rules.

2.5 Set Up Campaign Cost Import

Objective: Tie ad spend to campaign ROI.

Actions:

1. In GA4 → Admin → Data Import → Cost Data.
2. Import Google Ads automatically (link account).
3. For LinkedIn/Meta: schedule daily export via Supermetrics/ETL into BigQuery.
4. Normalize schema: Campaign ID, Impressions, Clicks, Spend.

Deliverable: Cost Data Integration Sheet documenting each platform's import method.

2.6 Governance & QA

Objective: Maintain trust in source integrity long-term.

Actions:

1. Weekly QA: Pull top 10 campaigns, check UTM consistency.
2. Monthly QA: Reconcile GA4 vs. ad platform spend (variance <5%).
3. Quarterly Review: Update channel taxonomy for new platforms.

Deliverable: A **GA4 QA Checklist** (weekly/monthly/quarterly tasks).

Step 2 Output (VP-Level Takeaway)

- A **UTM Governance Guide + Builder Sheet** that locks campaign tracking.
- A **Conversion Event Map** ensuring GA4 captures pipeline-driving actions.
- A **BigQuery Data Pipeline Schema** ready for CRM joins.
- A **Channel Grouping Policy** so marketing and sales speak the same language.
- A **Cost Data Integration Sheet** tying spend → ROI.
- A **QA Checklist** to keep it clean.

Result

Marketing source integrity is airtight. Every click, conversion, and dollar of spend can flow into the closed-loop model without gaps or finger-pointing.

Step 3: Sync CRM for Pipeline Data (Execution Guide)

3.1 Connect GA4/BigQuery to CRM

Objective: Make marketing source data visible at the lead and opportunity level.

Actions:

1. **Integration Options:**
   - **Native connectors:** HubSpot ↔ GA4, Salesforce ↔ Google Ads.
   - **Middleware/ETL:** Fivetran, Hightouch, Stitch, Zapier for custom GA4 → CRM sync.
   - **Direct BigQuery → CRM:** For orgs with data engineering capacity.
2. Push these fields into CRM lead/contact records:
   - utm_source, utm_medium, utm_campaign, utm_content, utm_term
   - First-touch timestamp
   - Last-touch timestamp
   - Session ID (if multi-touch tracking is planned).
3. Validate: Create a test lead via a tagged form fill, confirm UTMs appear in CRM.

Deliverable: Integration Map (diagram of GA4 → BigQuery → CRM data flow).

3.2 Map Lead → Contact → Opportunity → Revenue Stages

Objective: Define how marketing touchpoints move through CRM objects.

Actions:

1. In CRM, align with RevOps on object mapping:
   - **Lead** = net new record from marketing form/event.
   - **Contact** = qualified lead linked to an account.
   - **Opportunity** = sales-engaged deal with stage.
   - **Revenue** = Closed Won amount.
2. Create field mappings:
   - **Lead Source** (high-level channel).
   - **Original UTM set** (captured at creation).
   - **Most Recent UTM set** (updated with every new touch).
   - **Primary Campaign ID** (linked to CRM Campaign Object).
3. Define **Lifecycle Stages** (MQL, SQL, SAL, Opportunity, Customer).

Deliverable: Lifecycle Mapping Doc (flowchart + field-level mapping table).

3.3 Ensure Campaign ID & UTM Fields Persist

Objective: Prevent loss of source data during record merges or stage transitions.

Actions:

1. Configure CRM rules:
   - Lock **Original UTM fields** (read-only, never overwritten).
   - Update **Latest UTM fields** dynamically.
2. Connect **Campaign Object** to Opportunities:
   - Enforce Campaign ID link at opportunity creation.
   - Require campaign attribution on manual opp creation by sales.

3. Run QA: Create test records, convert leads → opps, check that UTMs persist.

Deliverable: Data Persistence Rules Sheet (policy doc for UTM + campaign handling).

3.4 QA Pipeline Flow

Objective: Ensure data actually ties from click → opp → revenue.

Actions:

1. Create test lead via paid ad with full UTM string.
2. Watch journey: Lead created → Contact → Opportunity → Closed Won.
3. Validate: UTMs and Campaign ID are present in final Opp record.
4. Run a GA4 → CRM join query in BigQuery: confirm pipeline attribution.

Deliverable: QA Test Script (step-by-step test case to validate attribution).

3.5 Define Reporting Alignment Rules

Objective: Lock Sales & Marketing into one version of the truth.

Actions:

1. Agree with RevOps on which field drives attribution in opp records:
   - **Primary Campaign ID** vs. **Original Source**.
   - Rule of thumb: Campaign ID for influenced pipeline, Original Source for sourced pipeline.
2. Document reporting hierarchy:
   - Lead Source (high-level view).
   - UTM Campaign (specific initiative).

  - Campaign Object (multi-touch influence).

3. Publish an internal **"Revenue Attribution FAQ"** for sales/marketing teams.

Deliverable: Attribution Governance Deck (slides explaining rules with screenshots).

Step 3 Output (VP-Level Takeaway)

- **Integration Map** connecting GA4 → BigQuery → CRM.
- **Lifecycle Mapping Doc** showing lead → opp → revenue with field-level detail.
- **Data Persistence Rules Sheet** ensuring UTMs survive record merges.
- **QA Test Script** to validate closed-loop flow.
- **Attribution Governance Deck** aligning marketing + sales + finance.

Result

Marketing's source and campaign data flow cleanly into CRM, tying every opportunity back to spend. No more broken attribution when leads convert to contacts or opps.

Step 4: Build the Closed-Loop Data Model (Execution Guide)

4.1 Define the Core Data Entities

Objective: Identify the minimum dataset needed for closed-loop attribution.

Entities:

1. **GA4 Events (BigQuery)** – session, user, UTMs, conversion events.
2. **CRM Records** – leads, contacts, opportunities, closed revenue.
3. **Campaign Cost Data** – spend from Google Ads, LinkedIn, Meta, etc.

Deliverable: Entity-Relationship Diagram (ERD) showing joins between GA4, CRM, and spend.

4.2 Normalize Campaign Identifiers

Objective: Ensure data across systems can actually join.

Actions:

1. Create a **Campaign Lookup Table** (master sheet in BigQuery):
    - campaign_id (primary key).
    - utm_source, utm_medium, utm_campaign.
    - CRM Campaign ID.
    - Finance budget code (if available).
2. Map all GA4 UTMs + CRM Campaign IDs → Lookup Table.
3. Enforce naming conventions in campaign launches (no new campaign without an ID entry).

Deliverable: Campaign Lookup Table (BigQuery table + governance doc).

4.3 Build the Data Warehouse Layer (BigQuery)

Objective: Consolidate all raw data into clean, joinable tables.

Actions:

1. **Create base tables:**
    - ga4_sessions (user_id, session_id, utm_*, event_name, timestamp).
    - crm_opps (opp_id, account_id, stage, amount, close_date, source, campaign_id).
    - ad_spend (campaign_id, platform, spend, impressions, clicks).
2. **Clean + transform:**
    - Standardize date fields to UTC.
    - Deduplicate records (unique opp_id, unique session_id).
    - Flatten nested GA4 event parameters.
3. **Join logic:**
    - ga4_sessions.utm_campaign → campaign_lookup.utm_campaign.
    - crm_opps.campaign_id → campaign_lookup.crm_campaign_id.
    - ad_spend.campaign_id → campaign_lookup.campaign_id.

Deliverable: BigQuery SQL Scripts for ETL pipelines.

4.4 Construct Attribution Views

Objective: Create usable "views" for Looker dashboards.

Views:

1. **Attribution_Sourced_View**
   - Join opps where original_source = marketing channel.
   - Columns: Opp ID, Source, Campaign, Amount, Close Date.
2. **Attribution_Influenced_View**
   - Join opps with ≥1 contact tied to a marketing campaign.
   - Weighted attribution model applied (W-shape recommended).
3. **Pipeline_Velocity_View**
   - Opp creation → close dates to calculate velocity by source.
4. **ROI_View**
   - Campaign spend vs. pipeline vs. closed revenue.

Deliverable: BigQuery Views Pack (SQL + description sheet).

4.5 Apply Attribution Model Logic

Objective: Embed attribution rules into queries for consistency.

Actions:

1. Define attribution weight rules (from Step 1):
   - W-shape: 30% First-touch, 40% Opp creation, 30% Last-touch.
   - Linear or time-decay as secondary options.
2. Build SQL function:

3. CASE
4. WHEN touchpoint_type = 'First' THEN 0.3 * opp_value
5. WHEN touchpoint_type = 'Opp_Creation' THEN 0.4 * opp_value
6. WHEN touchpoint_type = 'Last' THEN 0.3 * opp_value
7. ELSE 0
8. END
9. Store results in attribution_fact table with opp_id, campaign_id, revenue_credit.

Deliverable: Attribution Logic Sheet (with SQL examples + business rules).

4.6 Validate with Reconciliation

Objective: Ensure attribution math ties back to Finance.

Actions:

1. Pull **Closed Won total** from CRM/Finance.
2. Pull **Attributed Revenue total** from BigQuery.
3. Reconcile variance → must be <5%.
4. Document reconciliation in monthly QA log.

Deliverable: Attribution Reconciliation Report (one-pager per month).

Step 4 Output (VP-Level Takeaway)

- **Entity-Relationship Diagram (ERD)** showing data joins.
- **Campaign Lookup Table** unifying GA4, CRM, and spend.
- **BigQuery ETL Scripts** to clean, standardize, and join datasets.

- **Attribution Views Pack** for sourced, influenced, velocity, and ROI.
- **Attribution Logic Sheet** codifying revenue credit distribution.
- **Reconciliation Report** ensuring Finance and Marketing match.

Result

A robust closed-loop attribution dataset—trustworthy, reconcilable, and ready to power Looker dashboards.

Step 5: Design Executive Dashboards (Looker Execution Guide)

5.1 Core Principles

Objective: Ensure dashboards drive decisions, not just display data.

Rules:

1. **One page per persona** – CMO, Demand Gen, Sales/RevOps.
2. **Top → Drill-Down** – KPI at the top, campaign detail below.
3. **Standardized KPIs** – same definitions across teams (from Step 1).
4. **Live, not static** – real-time or daily-refresh Looker dashboards tied to BigQuery Views (Step 4).

5.2 CMO / VP Dashboard

Audience: Board-facing view for executive alignment.

Top KPIs (tiles):

- Marketing-sourced pipeline (MTD/QTD/YTD).
- Marketing-influenced pipeline.
- ROI by channel (spend vs. closed revenue).
- CAC vs. LTV trend.
- Pipeline velocity (days from opp creation → close).

Drill-Downs:

- Channel contribution trend (line chart: pipeline $ by channel, monthly).

- Top 10 campaigns by ROI (table: spend, pipeline $, revenue, ROI%).
- New vs. expansion pipeline (stacked bar).

Deliverable: CMO Dashboard Spec Doc (wireframe + KPI definitions).

5.3 Demand Gen Dashboard

Audience: Campaign managers optimizing daily/weekly spend.

Top KPIs:

- Cost per MQL / SQL / Opp.
- Conversion rates (visit → lead → opp → revenue).
- Pipeline generated by campaign.
- Influenced opps by campaign.

Drill-Downs:

- Campaign ROI leaderboard (table with campaign ID, spend, pipeline, ROI).
- Paid media performance (CPC, CTR, CPL, opp conversion rate).
- Content influence (time-decay revenue by asset).
- Form/conversion breakdown (form type, completion %, opp influence).

Deliverable: Demand Gen Dashboard Spec Doc.

5.4 Sales / RevOps Dashboard

Audience: Sales leaders & RevOps bridging opp quality + velocity.

Top KPIs:

- Opportunity quality by source (win rate by channel).

- Avg deal size by source.
- Sales cycle length by source.
- Marketing-influenced opps currently open (pipeline health).

Drill-Downs:

- Win rate by channel/campaign (heatmap).
- Cycle length distribution (boxplot: short vs. long cycle deals).
- Rep adoption of campaign opps (table: rep, # opps influenced by marketing, close rate).

Deliverable: Sales/RevOps Dashboard Spec Doc.

5.5 Dashboard Build Process

Actions:

1. **Connect Looker to BigQuery:**
   - Use Attribution_Sourced_View, Attribution_Influenced_View, ROI_View, Pipeline_Velocity_View (from Step 4).
2. **Model LookML (or Explore if lightweight):**
   - Define dimensions: Channel, Campaign, UTM, Opp Stage.
   - Define measures: Spend, Opp Count, Pipeline $, Revenue $.
3. **Create dashboard wireframes** in Figma/whiteboard first.
4. **Build dashboards** in Looker, respecting persona structure.
5. **User Acceptance Testing (UAT):** Run with 2 execs + 2 demand gen managers + 2 RevOps users.
6. **Iterate** – remove unused tiles, promote key KPIs to top row.

Deliverable: Dashboard Wireframe Pack + LookML Spec.

5.6 Cadence & Governance

Objective: Lock dashboards into business rhythm.

Actions:

1. Weekly: Demand Gen reviews campaign ROI + pipeline contribution.
2. Biweekly: Sales + Marketing review opp quality by source.
3. Monthly: CMO reviews pipeline velocity + ROI trends with exec team.
4. Quarterly: Revisit attribution models & adjust dashboards accordingly.

Deliverable: Dashboard Governance Playbook (who reviews what, when, and how).

Step 5 Output (VP-Level Takeaway)

- **Dashboard Spec Docs** for CMO, Demand Gen, and Sales/RevOps.
- **LookML Spec + Wireframes** for execution.
- **Governance Playbook** aligning cadence and ownership.

Result

Every executive has a single source of truth:

- The CMO can defend spend in the boardroom.
- Demand Gen can optimize campaigns daily.
- Sales can trust pipeline quality data.

Step 6: Governance & Cadence (Execution Guide)

6.1 Define Data Ownership

Objective: Make clear who owns which parts of the system.

Roles & Owners:

- **Marketing Ops** → UTM governance, GA4 event tracking, campaign tagging.
- **RevOps** → CRM field mapping, pipeline stage integrity, campaign-object enforcement.
- **Data/BI** → BigQuery transformations, Looker dashboard maintenance.
- **Finance** → Revenue reconciliation, quarterly validation.

Deliverable: RACI Matrix (Responsible, Accountable, Consulted, Informed) by system + task.

6.2 Establish QA Processes

Objective: Prevent data drift, broken attribution, or leadership mistrust.

Weekly QA:

- Spot-check 5 leads from new campaigns → confirm UTMs + Campaign IDs persist in CRM.
- Validate ad spend imports vs. platform data (<5% variance).

Monthly QA:

- Reconcile attributed revenue (BigQuery) vs. Finance closed revenue (<5% variance).
- Audit GA4 event firing for key conversions.

Quarterly QA:

- Review channel groupings + UTM taxonomy.
- Confirm attribution model still matches buying motion (adjust if GTM shifts).

Deliverable: QA Checklist (Weekly, Monthly, Quarterly) with sign-off log.

6.3 Operating Cadence

Objective: Integrate dashboards into the actual leadership rhythm.

Weekly (Ops + Demand Gen):

- 30-min pipeline velocity + ROI check.
- Optimize budget allocation at campaign level.

Biweekly (Marketing + Sales):

- Joint review of opportunity quality by source.
- Address “bad lead” complaints with data.

Monthly (CMO + Exec Team):

- Review ROI trends, CAC vs. LTV, sourced/influenced pipeline.
- Present reconciliation vs. Finance totals.

Quarterly (C-Suite):

- Attribution model recalibration.
- Budget allocation decisions for next quarter.

Deliverable: Attribution Review Calendar (integrated into company operating cadence).

6.4 Documentation & Change Control

Objective: Protect system integrity as team members or tech change.

Actions:

1. Create a **Central Attribution Wiki** (Confluence/Notion/SharePoint).
   - Revenue Definition Charter (Step 1).
   - UTM Governance Guide (Step 2).
   - CRM Field Mapping (Step 3).
   - BigQuery Model + Views (Step 4).
   - Dashboard Spec Docs (Step 5).
   - QA Checklist + Review Calendar (Step 6).
2. Institute **Change Control:**
   - No modifications to LookML or BigQuery models without documented Jira ticket + approver.
   - Version control via Git (for LookML) and SQL repo.

Deliverable: Attribution Governance Wiki + **Change Control Policy Doc**.

6.5 Training & Adoption

Objective: Ensure stakeholders actually use the system.

Actions:

- Build **1-hour training modules** for each persona:
  - Execs → "How to read the CMO dashboard."
  - Demand Gen → "How to act on campaign ROI reports."
  - Sales → "How to interpret opportunity source quality."

- Record sessions, embed into wiki.
- Run **quarterly refresher training.**

Deliverable: Training Deck + Video Library.

Step 6 Output (VP-Level Takeaway)

- **RACI Matrix** clarifying ownership.
- **QA Checklist** to ensure clean data.
- **Attribution Review Calendar** embedded into ops cadence.
- **Governance Wiki + Change Control Doc** for institutional memory.
- **Training Deck + Video Library** to drive adoption.

Result

The closed-loop attribution engine isn't a one-off project—it's a living system. Leadership trusts the numbers, Finance sees alignment, Sales buys into lead quality, and Marketing can prove ROI with confidence quarter after quarter.

You’ve got this. And we’ve got you.
This isn’t just another tool. It’s a spark.
One that’s meant to ignite clarity, courage, and momentum so you can rise with intention—on your terms..

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