

# WICKED REPORTS PLAYBOOK

“Easily the most important  
and influential book  
since 1939.”

Steve Jobs\*



\*Probably not the  
Steve Jobs you're  
thinking.

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# THE WICKED PHILOSOPHY

All clicks and conversions are not created equal.

Leads take time to buy.

You can't trust what you can't prove.

Accurate Customer Lifetime Value is the foundation.

ROI is the goal.

Match the attribution model to the campaign goal.

Act on your data with Wicked's Scale, Kill, Chill Framework.



# USING THIS PLAYBOOK

Wicked Reports relies on real clicks, real lead and sale conversions, tied to real ad spend. Sometimes our customers are fully set up in an hour or so. Other times it can take up to a week depending on tech stack complexity and integration time (if the customer does not have our standard CRM and Shopping Cart integrations).

Some of the Wicked Quick Wins are available sooner than others. Certain attribution models need time to be seasoned with data over a complete customer buying cycle before they can effectively be deployed to optimize your campaigns.

Immediately - it is a critical asset to understand attribution and get insights

Determining the Correct Attribution Model

1 day after CRM and shopping cart integration

Evaluating New Customer LTV & ROI Over Time with the New Customer Cohort

Evaluating New Lead LTV & ROI Over Time with the New Lead Cohort

Predictive Behaviors to Analyze the Customer Buying Cycle

1 day after CRM integration, Shopping cart integration, and clicks tracked

Optimizing marketing campaigns with Last Click ROI attribution

Optimizing marketing campaigns with Full Impact ROI attribution

1 week after CRM integration, Shopping cart integration, and clicks tracked

Determining Kill or Chill on a Low ROI Campaign

2 weeks after CRM integration, Shopping cart integration, and clicks tracked

Optimizing marketing campaigns with Linear ROI attribution

Optimizing marketing campaigns with First Click ROI attribution

Optimizing marketing campaigns with New Lead ROI attribution

Optimizing marketing campaigns with Re-Engaged Lead ROI attribution

Here is a handy matrix to use for play usage based on your Wicked Reports setup and your customer buying cycle.



# WICKED QUICK WINS ALL ABOUT ATTRIBUTION MODELS

## Determining the Correct Attribution Model

The intent of a marketing campaign is the most important factor in selecting the correct attribution model.

When you first start using Wicked Reports, Last Click & Full Impact attribution are the best to use for the first few weeks.

After a buying cycle of data has been accumulated, you can start acting on the rest of the attribution model's ROI & LTV calculations.

Click to play <https://youtu.be/cFVTjnJV69I>

Model	Best Used to Measure	Touchpoints	Revenue Reconciliation	How Soon to Use WICKED After Setup
Full Impact	If a campaign is working someway/somehow to drive customers and ROI, and you would rather have a loud signal even if it means revenue might get double-counted.	Multi Touch	No	1 day
Linear	If a campaign is working someway/somehow to drive customers and ROI, and you do not revenue to be overcounted.	Multi Touch	Yes	1 day
First Click	What made my customers first come to my brand? Initial brand awareness from cold traffic that leads to customers in the future.	Single Touch	Yes	1 buying cycle
New Lead	New leads generated from cold traffic that leads to customers in the future.	Single Touch	Yes	1 buying cycle
Re-Engaged Lead	Existing leads that re-optin to marketing and then convert to customers in the future.	Single Touch	Yes	1 buying cycle
Last Click	Last click prior to a sale.	Single Touch	Yes	1 day



**REVENUE RECONCILIATION:**  
The ability to have your revenue add up to the attributed revenue without overcounting.

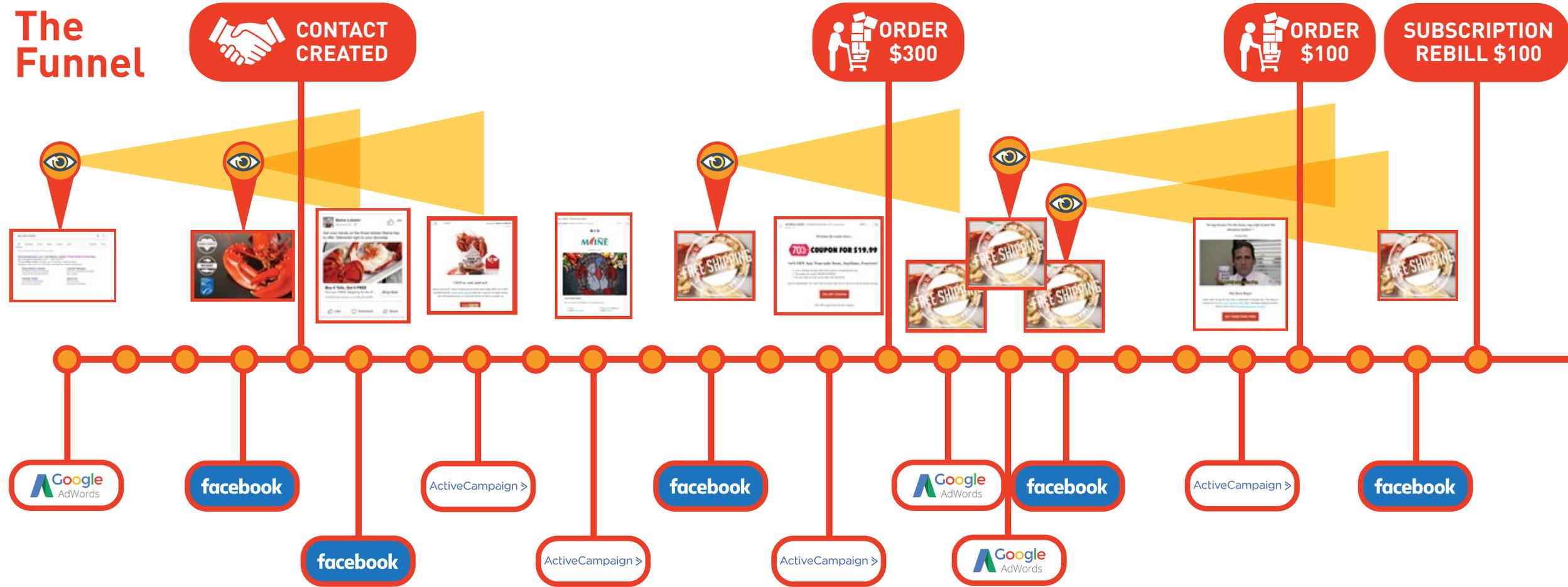
**BUYING CYCLE:** How long your leads take to buy (found in the Predictive Behaviors Report.)

**TOUCHPOINTS:** The clicks considered by an attribution model.

# ATTRIBUTION MODEL COMPARISON

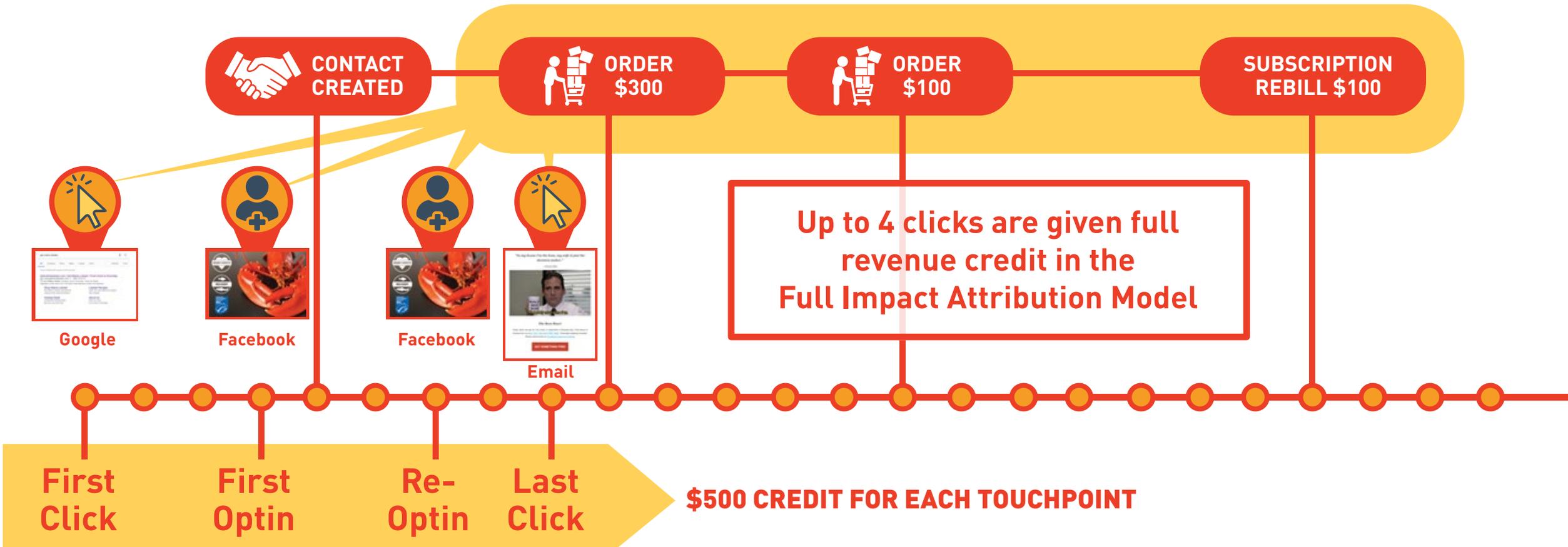
Let's walk through an example marketing funnel and how attribution models determine or take away credit.

## The Funnel



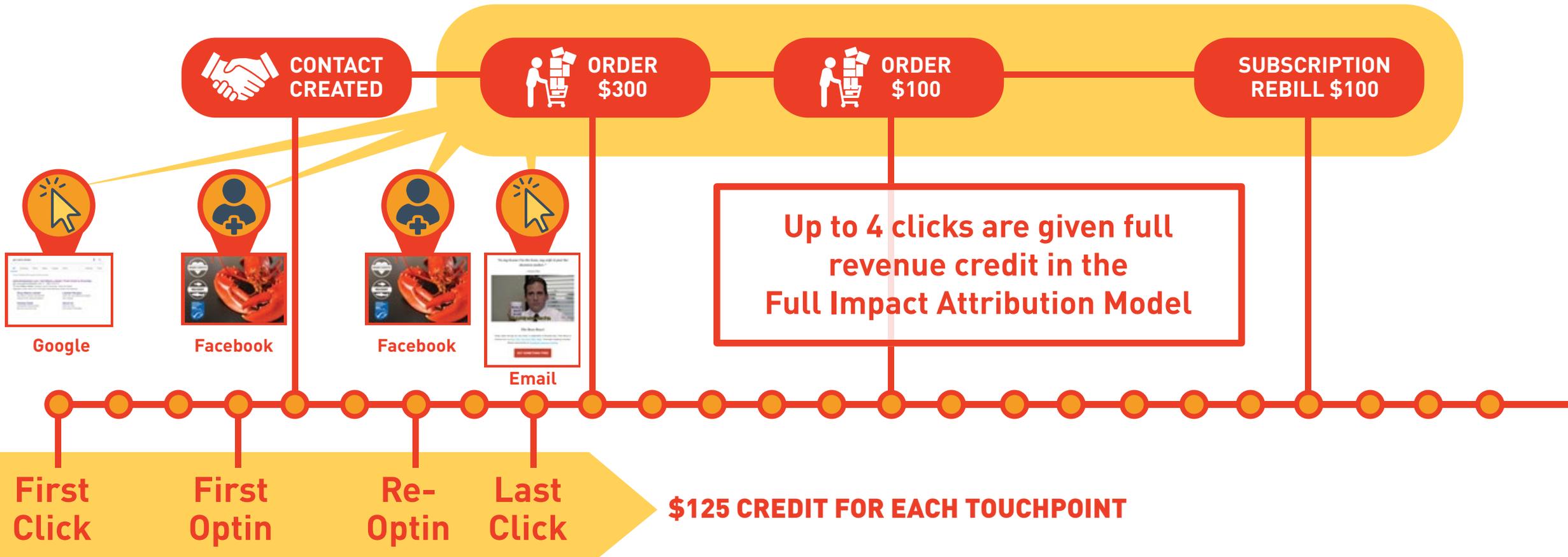
# FULL IMPACT ATTRIBUTION

A multi-touch attribution model that determines the most important 1-4 conversion points and assigns full revenue credit to each click prior to those conversions.



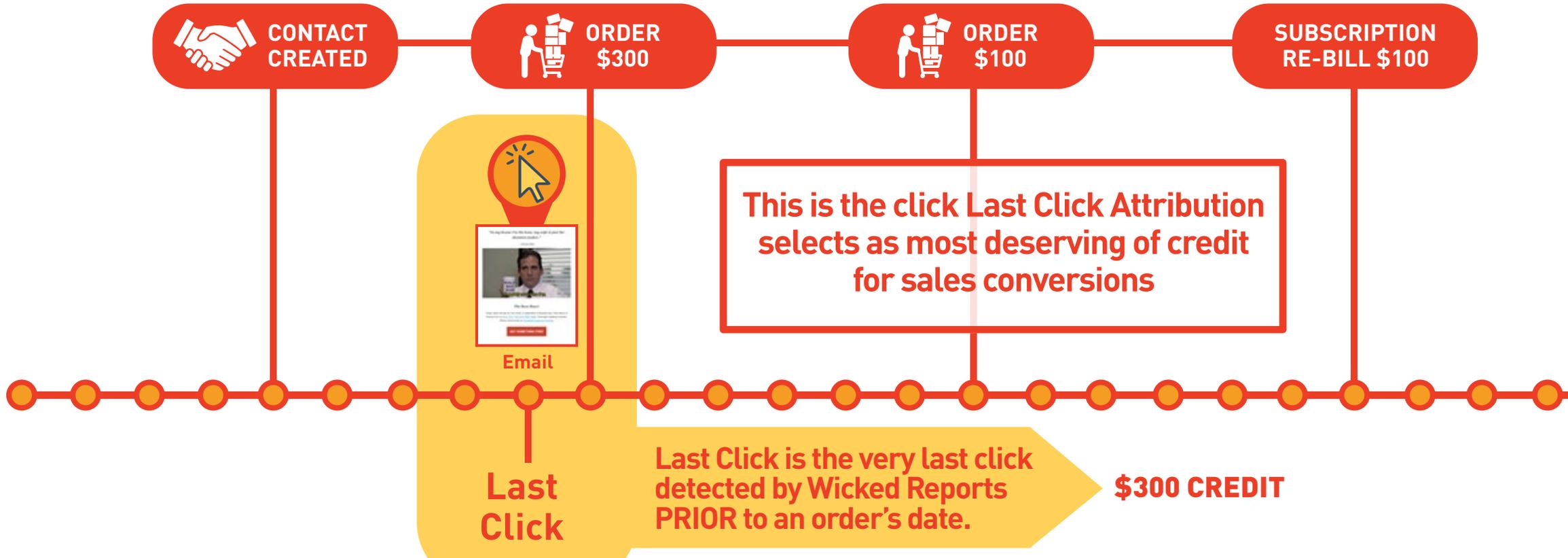
# LINEAR ATTRIBUTION

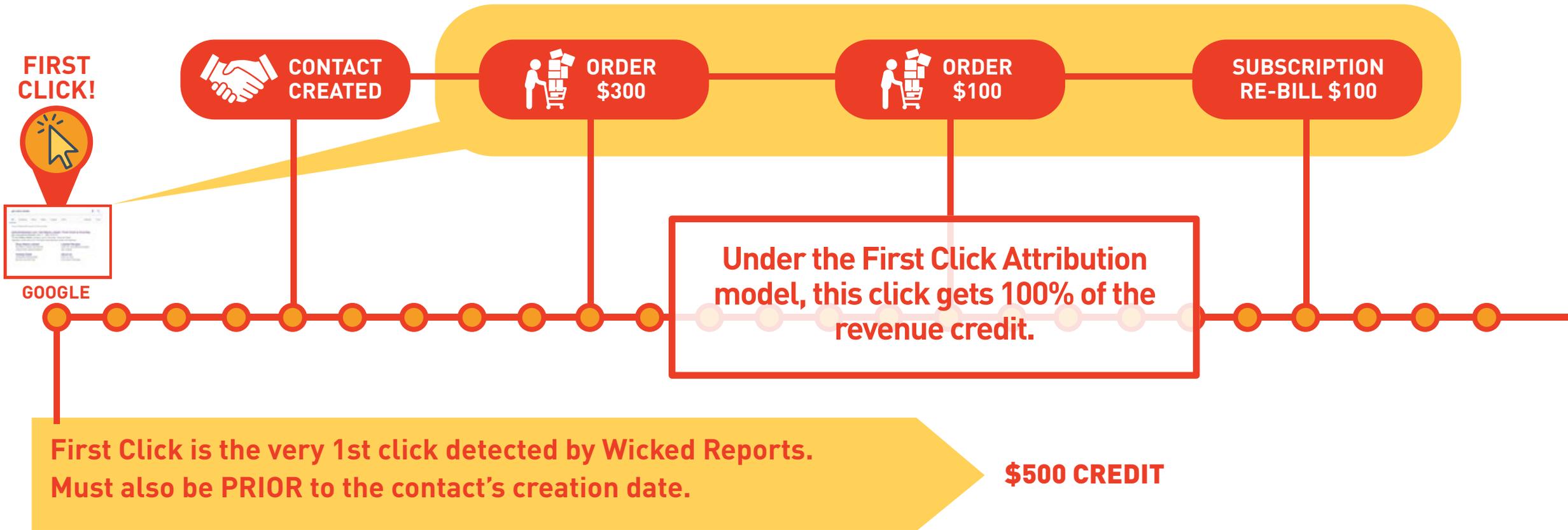
A multi-touch attribution model that determines the most important 1-4 conversion points and assigns fractional revenue credit to each click prior to those conversions.



# LAST CLICK ATTRIBUTION

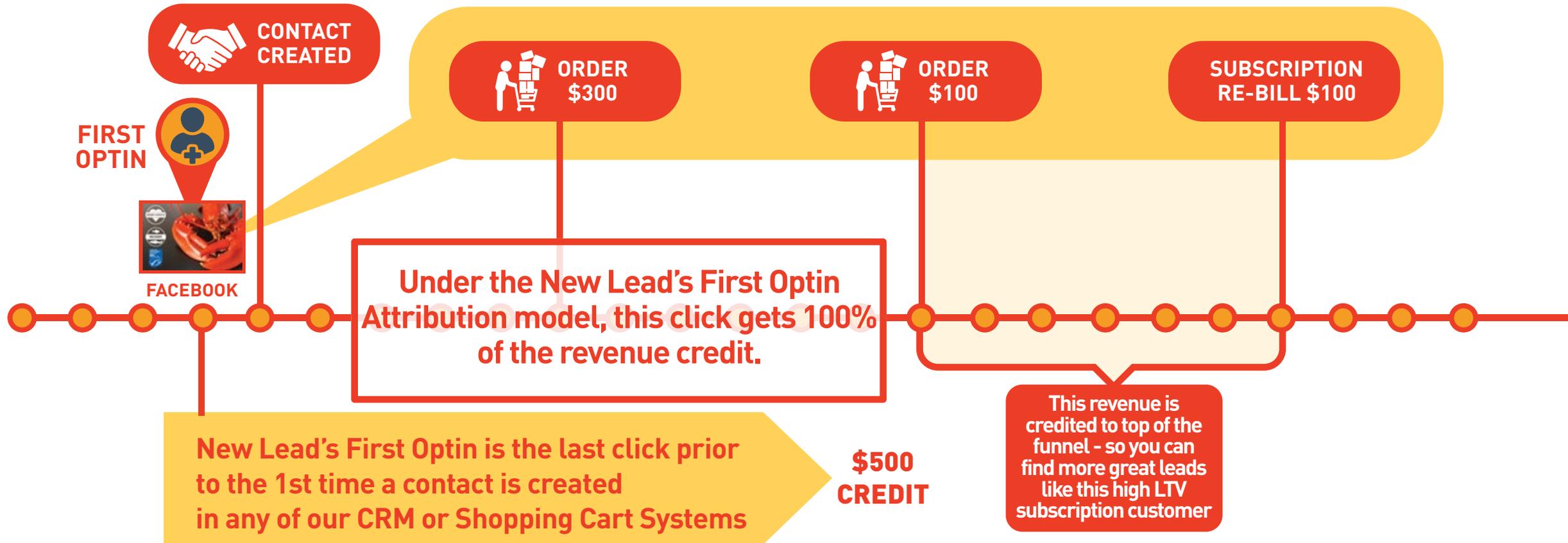
A single touch attribution model that looks back from a sale to the final click prior the sale and assigns full revenue credit to that click.





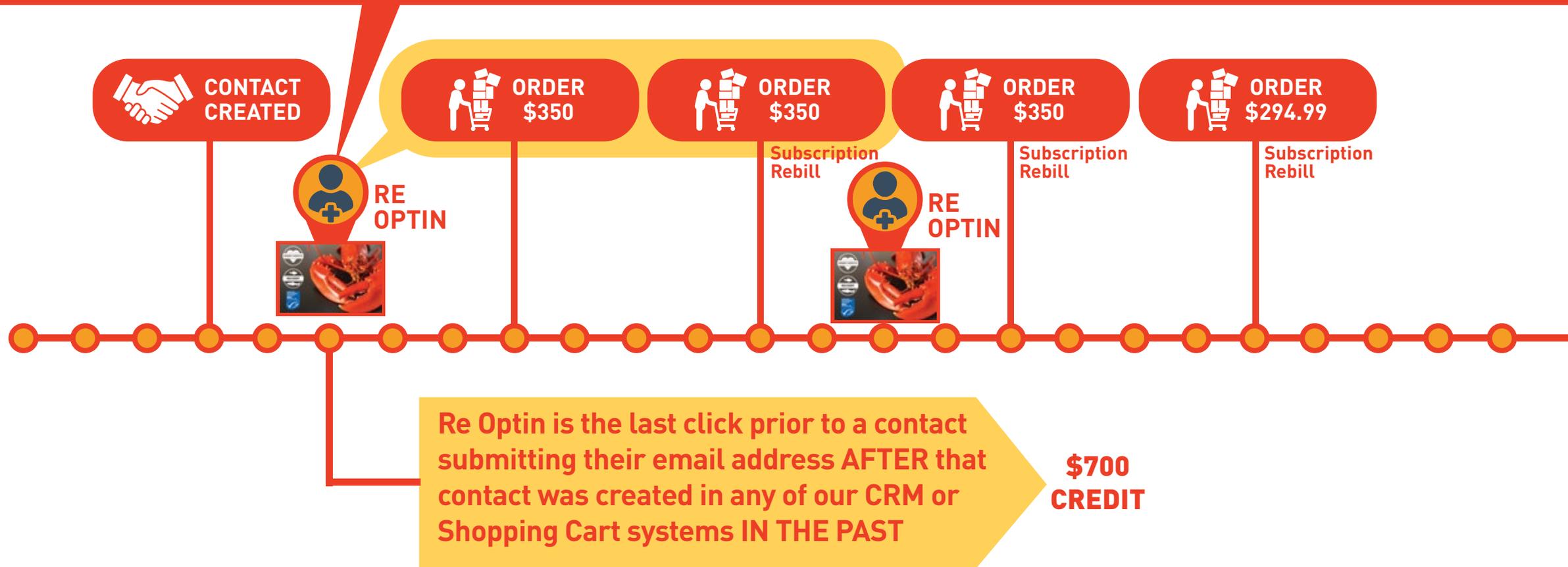
# NEW LEAD ATTRIBUTION

A single touch attribution model that looks back from a sale to the click that originally converted the customer to a new lead and assigns full revenue credit to that click.



# REENGAGED LEAD ATTRIBUTION

A single touch attribution model that looks back from a sale to the click that originally converted an existing lead to resubmit their email for marketing purposes and assigns full revenue credit to that click.



# THE WICKED REPORTS SCALE/KILL/CHILL FRAMEWORK TO OPTIMIZE LTV & ROI

1. Determine what you are trying to optimize
2. Select the best attribution model for that goal
3. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. **Advanced Scaling - Ad and Ad Group level optimization**
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
      2. Check to see if there is targeting (utm\_term value) that is generating high ROI this ad. **When there is, congrats, you have found a market for this message within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on targeting using this ad to the positive ROI targeting for this ad.
    3. **Advanced Scaling - Adset and Targeting optimization**
      1. Filter on the utm\_term value, which is the adset name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad's triggering criteria if a Google campaign.
      2. Check to see if there is an ad (utm\_content value) that is generating high ROI for this adset/targeting. **When there is, congrats, you have found a message to a market within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on ads using this ad set/targeting to the positive ROI ads for this ad set/targeting.

4. Repeat step 3 for all the high ROI campaigns.
5. Find the low ROI campaigns
6. Check the Forecasted Campaign Evaluation Time
7. How long has Wicked been tracking clicks?
  - A. If campaign has NOT been running longer than Forecasted Campaign Evaluation Time, CHILL
  - B. If campaign has NOT been running longer than Forecasted Campaign Evaluation Time, keep analyzing with the next step
8. Is the campaign's sales conversions highest at a specific customer journey point? You can choose one of 2 ways to measure this:
  - A. Measure the campaign using Linear ROI
    - I. Go to the ROI report.
    - II. Select the campaign in the campaign filter.
    - III. Select Linear ROI
    - IV. Scroll to the far right along the campaign row. There are fields "First Click Sales", "New Lead Sales", "ReEngaged Lead Sales" and "Last Click Sales". These fields are telling you where the conversions are coming from.
  - B. Measure the campaign using Wicked Tool's Customer Journey
    - I. Click on Wicked Tools on that campaign's row.
    - II. Select Customer Journey.
    - III. There are fields "First Click Sales", "New Lead Sales", "ReEngaged Lead Sales" and "Last Click Sales". These fields are telling you where the conversions are coming from.

9. Is there a significantly larger amount of sales occurring at either First Click, New Lead, Re-Engaged Lead, or Last Click sales fields?
  - A. Use the attribution model best suited for the largest amount of conversions.
  - B. Is the ROI acceptable?
  - C. If yes, CHILL
  - D. If no, keep analyzing with the next step
10. Are there a couple of ad/targeting combinations within the overall negative ROI campaign that have positive ROI?
  - A. If yes, move the ad spend from the negative ROI ad/targeting combinations to the positive ROI combinations.
  - B. If no, KILL this campaign ad spend and deploy capital elsewhere.

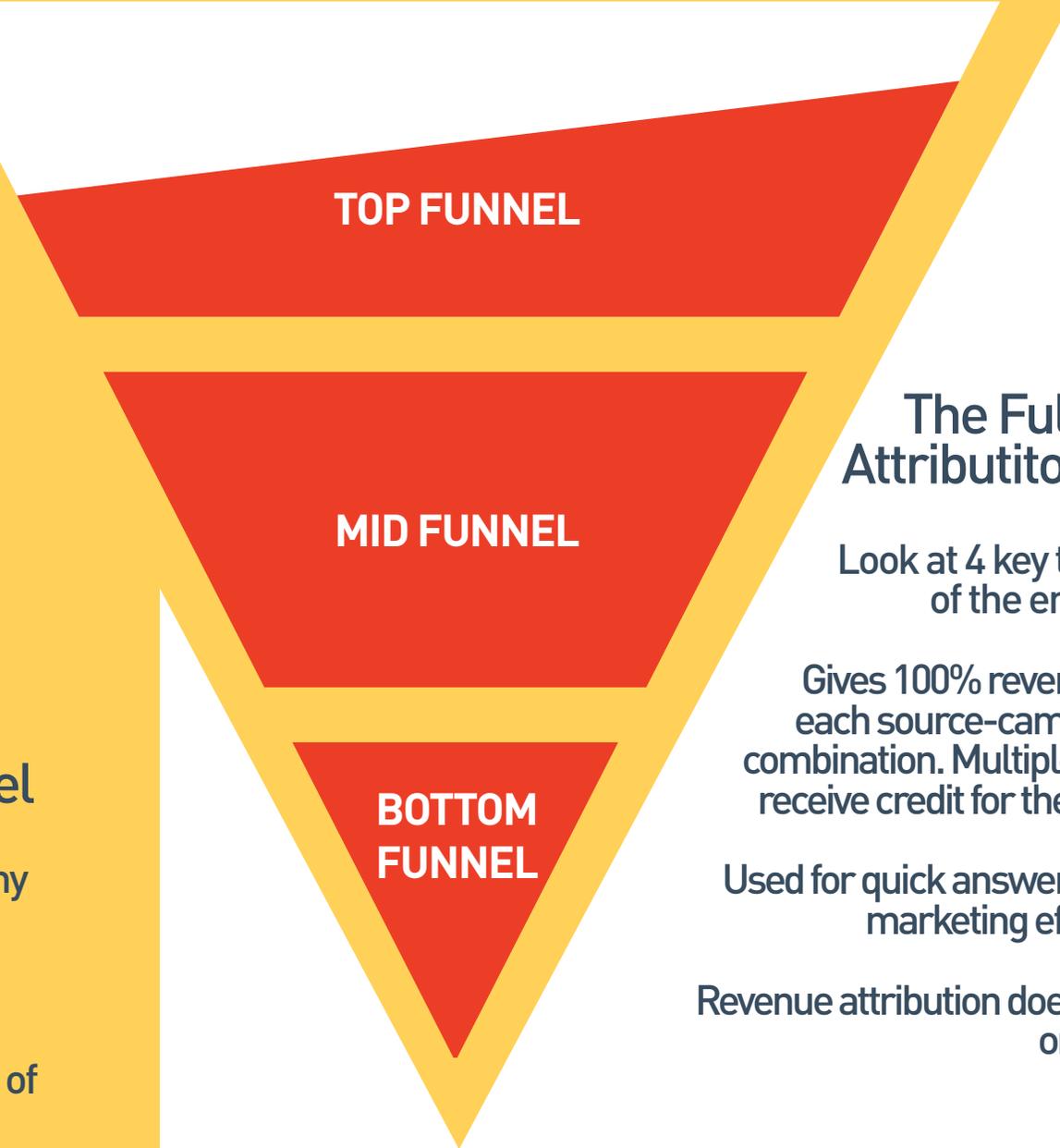


# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH FULL IMPACT ROI ATTRIBUTION

## When to use the Full Impact attribution model

Full Impact attribution is helpful when needing to know "is my marketing effective somewhere?" and you do not segment your marketing by top, middle, and bottom of the funnel.

It is also a great model to use in the 1st 30 days of Wicked Reports while you are still accumulating enough data for top of funnel campaign analysis.



TOP FUNNEL

MID FUNNEL

BOTTOM  
FUNNEL

## The Full Impact Attribution model

Look at 4 key touchpoints of the entire funnel.

Gives 100% revenue credit to each source-campaign touch combination. Multiple clicks may receive credit for the same sale.

Used for quick answers on overall marketing effectiveness.

Revenue attribution does not match order source.

# Acting on Full Impact ROI using the The Wicked Reports ROI & LTV Optimization Framework

1. You want to know what's working in your marketing funnel using a multi-touch attribution model and you are ok if the attributed revenue overcounts your actual revenue (if not head over to the Linear ROI attribution model right now).
2. Go to the ROI Report.
3. Choose Full Impact Attribution
4. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. Advanced Scaling - Ad and Ad Group level optimization
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
      2. Check to see if there is targeting (utm\_term value) that is generating high ROI this ad. **When there is, congrats, you have found a market for this message within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on targeting using this ad to the positive ROI targeting for this ad.
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      2. Check to see if there is an ad (utm\_content value) that is generating high ROI for this adset/targeting. **When there is, congrats, you have found a message to a market within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on ds using this ad set/targeting to the positive ROI ads for this ad set/targeting.
5. Repeat step 5 for all the high ROI campaigns.
6. Find the low ROI campaigns.
7. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



Click to play  
<https://youtu.be/bE43t8o4d5w>



# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH LAST CLICK ROI ATTRIBUTION

## When to use the Last Click attribution model

Last click attribution exists to tell you what converted traffic to make a purchase.

Last click attribution is perfect for bottom of the funnel brand sales conversion campaigns.

TOP FUNNEL

MID FUNNEL

**BOTTOM  
FUNNEL**

Last click is great for bottom of the funnel when the next step in your buying cycle is a purchase.

Wicked looks cross-channel, so we don't match ad platform to conversion stats.

# Acting on Last Click ROI using the The Wicked Reports ROI & LTV Optimization Framework



Click to play

<https://youtu.be/gjG25EP36f4>

1. You want to know what's converting your bottom of the funnel into sales.
2. Go to the ROI Report.
3. Choose Last Click Attribution
4. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. Advanced Scaling - Ad and Ad Group level optimization
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
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5. Repeat step 4 for all the high ROI campaigns.
6. Find the low ROI campaigns
7. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



# WICKED QUICK WINS EVALUATING NEW LEAD LTV & ROI OVER TIME WITH THE NEW LEAD COHORT

The Wicked Reports New Lead Cohort report connects your CRM leads to your shopping cart customers to give deep insights into lead value. As we attribute marketing spend over time, we can further segment the insights by marketing channel, campaign, and targeting.

## When to use the New Lead Cohort report

This report can be used 1 day after the CRM and shopping cart have been integrated to drive insights into how valuable your historical leads are, before we consider attribution to the source or campaign.

You can revisit this report after a month of lead tracking to see the impact of ad spend and marketing source on lead value for each cohort.

# HOW TO USE THE NEW LEAD COHORT REPORT



Click to play  
<https://youtu.be/ZdTk0KB-73Y>

**What is an optimal cost per lead when I want to break-even as fast as possible?**

Select the sources with ad spend.  
Look at the break-even column and find the fastest break-even month.  
Use that CPL as your goal.

**How profitable are my leads over time?**

Scan across a row to see the lead value increase.  
Filter by different paid sources to see how that impacts value up/down.

**When do I breakeven on my lead gen campaigns?**

Filter by different paid sources  
Look at the break-even column.  
When the number is lower or higher, what was different about that month in your campaigns?

**What was the best marketing for generating customers from these leads?**

Scroll down towards the bottom to the Top 5 Last Clicks. These are the 5 last click links that generated the most revenue from the leads across all the cohorts in the cohort grid above.

**When do the leads double in value?**

Look at the lead value day 0.  
Scan across the row looking for double the value.  
Alternatively, look for when the ROI is double in value.  
If the timeframe is acceptable, and you are already making \$ on your CPL, increase the budget or increase the CPL.

**When I buy more leads in a given month, does it lead to more money?**

Find the higher lead count months.  
Look at the revenue column for that month.  
Filter by different paid sources to see how that impacts value up/down

**What months generated the best or worst leads?**

Pick a date in the future for the cohort, such as Month 3.  
Scan vertically for the highest value - those are your most valuable leads.  
Scan vertically for the lowest value - those are your least valuable leads.  
Compare CPL to the value at Month 3 - the biggest spread was your best month and you should investigate what you were doing that month to make this happen - and double down.

**COHORT  
PLAYS  
TO RUN  
ON ALL  
COHORTS**

**COHORT  
PLAYS  
TO RUN  
ON ALL  
90 DAY OR  
OLDER  
COHORTS**



# WICKED QUICK WINS EVALUATING NEW CUSTOMER LTV & ROI OVER TIME WITH THE NEW CUSTOMER COHORT

The Wicked Reports Customer Cohort report evaluates your customer lifetime value. As we attribute marketing spend over time, we can further segment the insights by marketing channel, campaign, and targeting.

## When to use the New Customer Cohort report

One great thing about this report is that it can be used 1 day after shopping cart have been integrated, before we consider attribution to the source or campaign.

You can revisit this report after a month of lead tracking to see the impact of ad spend and marketing source on lead value for each cohort.

# HOW TO USE THE NEW CUSTOMER COHORT REPORT

COHORT  
PLAYS  
TO RUN  
ON ALL  
COHORTS

**What is an optimal cost to acquire a customer when I want to break-even as fast as possible?**

Select the sources with ad spend.  
Look at the break-even column and find the fastest break-even month.  
Use that CAC as your goal.

**How profitable are my customers over time?**

Scan across a row to see the customer value increase.  
Filter by different paid sources to see how that impacts value up/down.

**When do I break-even acquiring a customer?**

Filter by different paid sources  
Look at the break-even column.  
When the number is lower or higher, what was different about that month in your campaigns?

**What was the best marketing for generating customers?**

Scroll down towards the bottom to the Top 5 Last Clicks. These are the 5 last click links that generated the most revenue from the leads across all the cohorts in the cohort grid above.

**When do the customers double in value?**

Look at the customer value day 0.  
Scan across the row looking for double the value.  
Alternatively, look for when the ROI is double in value.  
If the timeframe is acceptable, and you are already making \$ on your CAC, increase the budget or increase the CAC.

**When I buy more customers in a given month, does it lead to more money?**

Find the higher customer count months.  
Look at the revenue column for that month.  
Filter by different paid sources to see how that impacts value up/down

**What months generated the best or worst customers?**

Pick a date in the future for the cohort, such as Month 3.  
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Compare CAC to the value at Month 3 - the biggest spread was your best month and you should investigate what you were doing that month to make this happen - and double down.

COHORT  
PLAYS  
TO RUN  
ON ALL  
90 DAY OR  
OLDER  
COHORTS

**WICKED QUICK WINS:**  
EVALUATING NEW CUSTOMER CAC,  
LTV, & ROI OVER TIME WITH  
THE NEW CUSTOMER COHORT

with Scott Desgrosseilliers



Click to play

<https://youtu.be/xZpW1pTPTI0>



# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH FIRST CLICK ROI ATTRIBUTION

## When to use the First Click attribution model

Use this attribution model to measure the impact of cold traffic's initial brand awareness from a future customer's very first click to your brand.

TOP FUNNEL

How we  
calculate  
First Click  
attribution

MID FUNNEL

First Click  
Attribution model =  
Top of the Funnel  
Initial Awareness

BOTTOM  
FUNNEL

First Click ROI = uses first click  
attribution to calculate if the first  
clicks return LTV & ROI over time.

Used to measure the first click that  
made someone aware of your brand.

Works great if you combine this analysis  
with retargeting in a new campaign to  
get capture the new lead.

# ACTING ON FIRST CLICK ROI USING THE WICKED REPORTS ROI & LTV OPTIMIZATION FRAMEWORK



Click to play  
<https://youtu.be/U2IMNCKK3Ac>

1. You want to know what's converting your top of the funnel into sales.
2. Go to the ROI Report.
3. Choose First Click Attribution
4. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. Advanced Scaling - Ad and Ad Group level optimization
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
      2. Check to see if there is targeting (utm\_term value) that is generating high ROI this ad. **When there is, congrats, you have found a market for this message within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on targeting using this ad to the positive ROI targeting for this ad.
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5. Repeat step 4 for all the high ROI campaigns.
6. Find the low ROI campaigns
7. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH NEW LEAD ROI ATTRIBUTION

First optin attribution exists to tell you what converts cold traffic to new leads. Wicked Reports detects new lead conversions automatically using our deep CRM integrations. This model attributes all future lifetime revenue back to that new lead generating click. It answers such questions as “Am I buying new leads at a profitable ROI over time?”

## When to use the New Lead attribution model

First optin attribution exists to tell you what converts cold traffic to new leads. Wicked Reports detects new lead conversions automatically using our deep CRM integrations.

TOP FUNNEL

MID FUNNEL

BOTTOM  
FUNNEL

How we  
calculate  
New Lead  
Attribution

First Optin attribution model  
= Top of the Funnel New Lead  
Visibility.

New Lead ROI = uses first  
optin attribution to calculate if  
the new leads return LTV &  
ROI over time.

Use to measure new lead  
generation campaigns.

# ACTING ON NEW LEAD ROI USING THE WICKED REPORTS ROI & LTV OPTIMIZATION FRAMEWORK



Click to play  
<https://youtu.be/2iwTkhyfoU0>

1. You want to know what's converting your new leads into sales.
2. Go to the ROI Report.
3. Choose New Lead ROI Attribution
4. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
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    3. Advanced Scaling - Adset and Targeting optimization
      1. Filter on the utm\_term value, which is the adset name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad's triggering criteria if a Google campaign.
      2. Check to see if there is an ad (utm\_content value) that is generating high ROI for this adset/targeting. **When there is, congrats, you have found a message to a market within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on ds using this ad set/targeting to the positive ROI ads for this ad set/targeting.
5. Repeat step 4 for all the high ROI campaigns.
6. Find the low ROI campaigns
7. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH RE-ENGAGED LEAD ROI ATTRIBUTION

## When to use the Re-Engaged Lead attribution model

ReEngaged Lead attribution is perfect for middle of the funnel campaigns of a multi-step funnel that require appointment scheduling, registrations, or downloads from existing leads before making a purchase decision.

TOP FUNNEL

How we calculate Re-Engaged Lead attribution

MID FUNNEL

Middle of the Funnel Existing Lead Visibility requires the ReOptin attribution model.

Use to measure campaigns that get existing leads to resubmit email addresses for:

- Lead magnets & downloads
- Book calls or appointments
- Result in abandoned carts

BOTTOM FUNNEL

# ACTING ON REENGAGED LEAD ROI USING THE WICKED REPORTS ROI & LTV OPTIMIZATION FRAMEWORK



Click to play

<https://youtu.be/JQlq2CdS9Wk>

1. You want to know what's converting your middle of the funnel leads into sales.
2. Go to the ROI Report.
3. Choose ReEngaged Lead Attribution
4. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. Advanced Scaling - Ad and Ad Group level optimization
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
      2. Check to see if there is targeting (utm\_term value) that is generating high ROI this ad. **When there is, congrats, you have found a market for this message within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on targeting using this ad to the positive ROI targeting for this ad.
    3. Advanced Scaling - Adset and Targeting optimization
      1. Filter on the utm\_term value, which is the adset name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad's triggering criteria if a Google campaign.
      2. Check to see if there is an ad (utm\_content value) that is generating high ROI for this adset/targeting. **When there is, congrats, you have found a message to a market within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on ds using this ad set/targeting to the positive ROI ads for this ad set/targeting.
5. Repeat step 4 for all the high ROI campaigns.
6. Find the low ROI campaigns
7. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



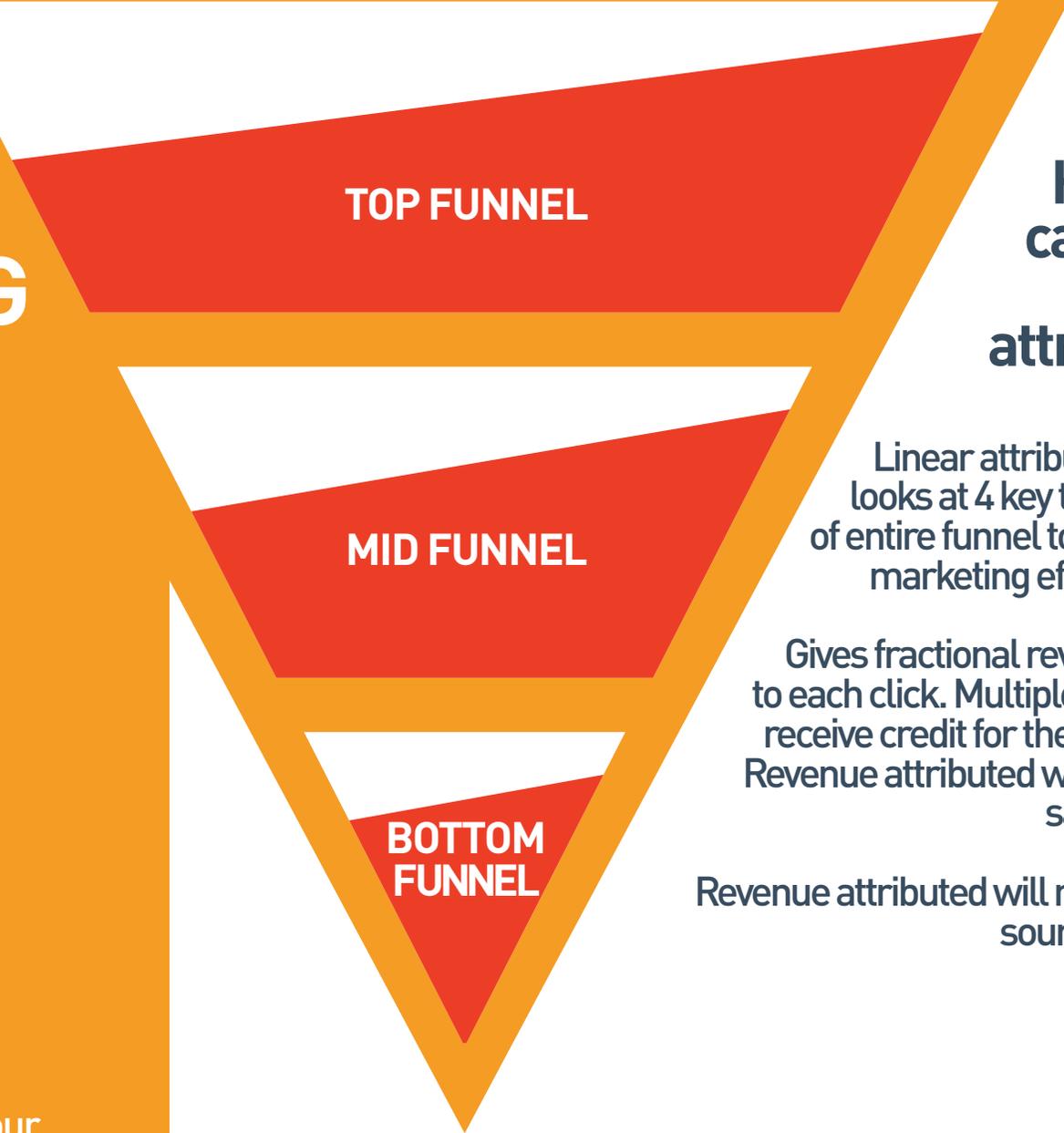
# WICKED QUICK WINS OPTIMIZING MARKETING CAMPAIGNS WITH LINEAR CLICK ROI ATTRIBUTION

The Linear attribution model looks across the customer journey's most important touchpoints to determine where your marketing is working. It distributes revenue credit fractionally so that there is no overcounting.

## When to use the Linear Attribution Model

Linear attribution is helpful when needing to know "is my marketing effective somewhere?" and you do not segment your marketing by top, middle, and bottom of the funnel.

It is also a great model to use to help determine where in your funnel conversions are happening from marketing campaigns.



## How we calculate Linear attribution

Linear attribution model looks at 4 key touch points of entire funnel to determine marketing effectiveness.

Gives fractional revenue credit to each click. Multiple clicks may receive credit for the same sale. Revenue attributed will equal the sale amount.

Revenue attributed will match order source revenue.

# ACTING ON LINEAR ROI USING THE WICKED REPORTS ROI & LTV OPTIMIZATION FRAMEWORK



Click to play  
<https://youtu.be/9SDG30tkBG0>

1. You want to know what's working in your marketing funnel using a multi-touch attribution model and You never want attributed revenue to exceed actual revenue (if not head over to the Full Impact ROI attribution model which will exceed actual revenue over time).
3. Go to the ROI Report.
4. Choose Linear ROI Attribution
5. Scale the High ROI campaigns
  - A. Select a Campaign Using the Campaign Explorer
  - B. Move negative ROI ad spend within the campaign to the positive ROI ad spend within the campaign in 3 ways
    1. You can move low ROI campaign ad spend to high ROI campaigns.
    2. Advanced Scaling - Ad and Ad Group level optimization
      1. Filter on the utm\_content value, which is the ad name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad group name if a Google campaign.
      2. Check to see if there is targeting (utm\_term value) that is generating high ROI this ad. **When there is, congrats, you have found a market for this message within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on targeting using this ad to the positive ROI targeting for this ad.
    3. Advanced Scaling - Adset and Targeting optimization
      1. Filter on the utm\_term value, which is the adset name if this is a Facebook/Pinterest/Snap/Twitter/TikTok campaign, or an ad's triggering criteria if a Google campaign.
      2. Check to see if there is an ad (utm\_content value) that is generating high ROI for this adset/targeting. **When there is, congrats, you have found a message to a market within the campaign that is generating higher relative ROI.** Move the negative ROI ad spend on ds using this ad set/targeting to the positive ROI ads for this ad set/targeting.
6. Repeat step 5 for all the high ROI campaigns.
7. Find the low ROI campaigns.
8. Run "Wicked Quick Wins: Determining Kill or Chill on a Low ROI Campaign"



# WICKED QUICK WINS

## DETERMINING KILL OR CHILL ON A LOW ROI CAMPAIGN

When a campaign shows low ROI, it may be time to kill the ad spend and move on to a different campaign. Or, it may be time to chill, and let the ad spend continue to run, because the campaign needs more time to show ROI. This playbook helps you understand and decide whether to kill, or chill, when facing a low ROI campaign

When to use the “Determining Kill or Chill on a Low ROI campaign” play

A campaign is showing lower relative ROI than other campaigns for a selected attribution model.

## Acting on Low ROI campaigns using the “Determining Kill or Chill on a Low ROI campaign” play

1. Check the Forecasted Campaign Evaluation Time
2. How long has Wicked been tracking clicks?
  - A. If campaign has NOT been running longer than Forecasted Campaign Evaluation Time, CHILL
  - B. If campaign has NOT been running longer than Forecasted Campaign Evaluation Time, keep analyzing with the next step

### Measure the campaign using Linear ROI

Now we want to see where the campaign is making money in the customer journey, if anywhere. You might be able to move the ad spend to that specific point and turn off the ad spend elsewhere in the journey. Here are 2 ways to detect that:

3. Measure the campaign using Linear ROI
  - I. Go to the ROI report.
  - II. Select the campaign in the campaign filter.
  - III. Select Linear ROI
  - IV. Scroll to the far right along the campaign row. There are fields “First Click Sales”, “New Lead Sales”, “ReEngaged Lead Sales” and “Last Click Sales”. These fields are telling you where the conversions are coming from.
4. **OR YOU CAN** Measure the campaign using Wicked Tool's Customer Journey
  - I. Click on Wicked Tools on that campaign's row.
  - II. Select Customer Journey.
  - III. There are fields “First Click Sales”, “New Lead Sales”, “ReEngaged Lead Sales” and “Last Click Sales”. These fields are telling you where the conversions are coming from.
5. Is there a significantly larger amount of sales occurring at either First Click, New Lead, Re-Engaged Lead, or Last Click sales fields?
  - A. Use the attribution model best suited for the largest amount of conversions.
  - B. Is the ROI acceptable?
  - C. If yes, CHILL
  - D. If not, keep analyzing with the next step
6. Are there ad/targeting combinations within the campaign with positive ROI?
  - A. If yes, move the ad spend from the negative ROI ad/targeting combinations to the positive ROI combinations. CHILL on this campaign and give it a buying cycle with the new optimization ad spend to generate return.
7. If no, KILL this campaign ad spend and deploy capital elsewhere.

# WICKED QUICK WINS: DETERMINING KILL OR CHILL ON A LOW ROI CAMPAIGN

with Scott Desgrosseilliers



Click to play <https://youtu.be/tM04q2VKMmU>



# WICKED QUICK WINS PREDICTIVE BEHAVIORS TO ANALYZE THE CUSTOMER BUYING CYCLE

We want to analyze how long leads take to buy, if they don't buy right away.

We use Predictive Behaviors to develop a model based on your historical customer data to help guide us on how soon cold traffic ad campaigns should be converting into customers.

Reminder, a "lead" for Wicked Reports is the first time a person shows up in your CRM; This could be by a traditional lead capture, or a simple coupon optin on your site/landing page, or they have bought and now show up in your CRM also.

## When to use Predictive Behaviors to Analyze the Customer Buying Cycle

Use this play after your historical lead data has been loaded into Wicked Reports from your CRM and your historical sales data has been loaded into Wicked Reports from your shopping cart.

Wicked runs the math on all the cross-platform conversions to give you insights into buying time of your leads. This will then inform decisions on cold traffic paid campaigns as we attribute traffic, leads, and sales.

# HOW TO USE PREDICTIVE BEHAVIORS TO ANALYZE THE CUSTOMER BUYING CYCLE

## 1. Open up Predictive Behaviors report in a separate tab.

## 2. Set the Date Range for the Last 365 Days and Run the Report.

The "Forecasted Campaign Evaluation Time" is our recommended minimum baseline of how long a campaign should take to start showing results.

This timeline works for all campaign goals, even if the goal is not lead gen.

If the campaign has not been running as long as the "Forecasted Campaign Evaluation Time", chill and give it time before making a decision to cut ad spend.

If the campaign has been running longer than the "Forecasted Campaign Evaluation Time", you can cut ad spend if unhappy with the ROI if that is the decision after running analysis indicated for the specific attribution model.

## 3. Scroll down to sales velocity.

This is the distribution of all your leads that converted to customers over time.

The wider the distribution, the more impact your first click and new lead ROI campaigns will continue to show revenue lift over time and the longer rope you should give them to become profitable.

## 4. Find the Forecasted Campaign Evaluation Time.

This is Wicked's analysis of the minimum amount of time you should allow cold traffic campaigns to show ROI based on your historical lead conversion time."

Click to play  
<https://youtu.be/tFGKrRdHHqo>



# AGENCY PLAYS

Here are common situations ad agencies face that are best used with the above plays.

## Proving the delayed value of your campaigns

1. Run the ROI report using the date range “Last 30 Days”.
2. Quick filter on “ads”.
3. Set costs = \$0
4. All the revenue is from ad campaigns that were tracked, the campaigns are now turned off, but the revenue continues to get generated from that spend!
5. For all of these campaigns, run the ROI report using the start and end dates of the campaign to get the ROI while the campaign was running.
6. Then extend the end date to today - that is the incremental ROI & revenue you have earned the client since the campaign stopped spending.
7. Tell your client this  
“This is revenue that ad spend has driven to provable sales for the last 30 days. The buyers came from clicks we bought more than 1 month ago and are now reaping the benefit.”
8. Use the highest revenue campaigns as inspiration for additional strategies.
9. Run the ROI report for the attribution model with the highest conversions using the start date of the campaign and the end date of today to see the increased ROI

## Measuring value while you are still new to Wicked Reports

1. As things integrate, reports unlock. See “Using this playbook”.
2. Run “Wicked Quick Wins: Optimizing marketing campaigns with Full Impact ROI attribution” play.
3. Get to know the attribution models.
4. Run the Customer Cohort plays to understand customer lifetime value impact.
5. Run the New Lead Cohort play to understand lead value over time impact.

## Showing client top funnel campaigns are working over time

1. Figure out the Forecasted Campaign Evaluation Time using the predictive behavior play
2. Run the First click ROI play.
3. Run the New Lead ROI play.
4. If ROI is sluggish, check the New Lead Cohort for expectations of value over time.

## Educating client on customer buying cycle

1. Run the predictive behavior play for the past year.
2. Explain that this is a model for how long people take to buy based on their actual data.
3. Explain the Forecasted Campaign Evaluation time.

## Using Customer Lifetime Value analysis to allow for 90 day ROI strategies

1. Run the predictive behavior play.
2. Explain that this is a model for how long people take to buy based on their actual data.
3. Add in the Customer cohort play so they can see any incremental value that accrues by end of month 3.
4. Use this data (which doesn't need tracking) to get buy-in on 90 days to measure the true ROI of campaigns

## Discovering best emails to help inform ad funnel messaging

1. ROI report, email quick filter.
2. Look at the highest clicked emails for the best interest generating email content.
3. Look at the highest revenue emails for the best converting email content.
4. Consider for use in ad copy.
5. Make sure all new lead gen leads are getting the good emails sent.

## Discovering crappy emails that aren't converting all the hard-won leads

1. ROI report, email quick filter.
2. Look at the highest clicked emails that have the lowest relative sales.
3. Fix them!

## ROI is low

1. Run the Low ROI kill or chill framework

# ADDITIONAL RESOURCES

Wicked Reports' most valuable asset is happy customers. In addition to the plays above, here is how we are here to help you get the most out of your Wicked Reports investment.



WickedReports.com

## Weekly Office Hours

Live Q&A from a Wicked Reports team member multiple times a week.

<http://wrgo.io/WickedReports/19138>

## Weekly Live Training

Live training with the CEO and Wicked Playbook creator Scott Desgrosseilliers. Scott will run through a playbook play and then take live Q&A on anything.

<http://wrgo.io/WickedReports/19137>

## Support Desk

[Support@wickedreports.com](mailto:Support@wickedreports.com) is a very fast way to get answers.

## Dedicated Customer Success Rep

All Wicked Reports customers now have a dedicated customer success representative. You can reach out to them directly, or email our customer retention manager [Joe@WickedReports.com](mailto:Joe@WickedReports.com) if you need to get reacquainted with your rep.

## Feedback on this Playbook?

Feedback on this playbook? [Click here](#) to let us know!