

Attribution vs CRM Workflow Triage Worksheet

Domain Methods

Use this when a team says attribution is broken, but nobody has traced where the story actually falls apart between campaign touch, CRM process, and revenue reporting.

1. Name the exact attribution complaint

- Which report or budget decision does the team not trust?
- Which channel, campaign, or quarter is under debate?
- What would the business do differently if the number were trustworthy?

2. Follow one disputed path from touch to revenue

- Original source / UTM fields present on lead?
- Source still visible after conversion to contact / account?
- Campaign membership preserved at opportunity stage?
- Contact roles, owner history, and stage timestamps believable?

3. Mark where the story breaks

Tracking problem

- clicks, sessions, or form capture missing at the top of funnel
- platform and web analytics disagree before the CRM handoff

CRM workflow problem

- source context disappears on conversion or sync
- lifecycle stages changed without downstream reporting updates
- ownership, duplicates, or account matching distort the path

Definition / revenue-linkage problem

- sourced vs influenced logic is contested
- opportunity, booking, and revenue dates are mixed inconsistently
- finance and marketing are not using the same commercial truth

4. Score the next fix

For each area, mark one:

- Fix now: this blocks a believable revenue story
- Directional only: useful for trend reading, not decision-grade reporting
- Stable enough: workflow is trustworthy enough to debate model choice

5. Decide the next move

If the workflow is weak, fix source preservation, lifecycle governance, and handoffs first.

If the workflow is stable, then revisit attribution model choice, touch windows, or tooling.

Working-session notes

Owner: _____

Highest-risk break: _____

First field / rule to repair: _____

Report to relabel as directional: _____

Date to re-check trust: _____

Next step if the room still disagrees: Domain Methods - Where Did the Money Go? or Three Teams, Three Numbers.