

B2B Offline Conversion Feedback Loop Worksheet

Define one governed CRM-to-platform signal before integration work starts. Page 1 of 2

1. Business decision and platform

Decision supported: campaign diagnostics / bidding / attribution / reporting / other

Platform(s) in scope: _____

Decision owner: _____ Review date: _____

2. Event selected for upload

Event: lead / MQL / accepted lead / SQL / qualified opportunity / closed-won / revenue

Exact definition and event owner: _____

Why this event fits the decision: speed / volume / business proximity / stability

3. Identity and source keys

Click/platform IDs: _____ First-party ID: _____

UTM/campaign fields and source-precedence rule: _____

What happens when deterministic matching is unavailable: _____

4. CRM, account, and opportunity mapping

Contact-to-account rule: _____

Account/contact-to-opportunity rule: _____

Merge, partner, imported, reopened, renewal, and multi-opportunity exceptions:

5. Event time and deduplication

Event timestamp rule: _____

Idempotency/dedupe key: _____

Stage regression, recycling, or requalification behavior: _____

6. Value and economic definition

Value: pipeline / bookings / recognized revenue / net revenue / margin / none

Currency and authoritative source: _____

Adjustment, cancellation, refund, or restatement rule: _____

B2B Offline Conversion Feedback Loop Worksheet

Define one governed CRM-to-platform signal before integration work starts. Page 2 of 2

7. Privacy and transmission eligibility

Purpose and permitted use: _____

Notice / consent / lawful-basis / contract / platform-term review owner: _____

Fields minimized before transmission: _____

8. Exclusions and suppressions

Ineligible records, regions, statuses, or purposes: _____

Deletion/correction path and retention period: _____

Who can pause the feed: _____

9. Latency, retry, and correction behavior

Latency target from event time to accepted upload: _____

Retryable failures and maximum age: _____

Dead-letter/error queue owner: _____

Correction or value-restatement behavior: _____

10. QA metrics and ownership

Capture: ____ Match: ____ Duplicate: ____ Latency: ____ Rejects: ____

CRM/warehouse/finance reconciliation owner: _____

Thresholds are decision-specific. Escalation rule: _____

11. Allowed uses and prohibited claims

Allowed: diagnostics / bidding / observed-path attribution / reporting / other

Not allowed: causal lift / neutral cross-channel truth / legal compliance / other

Caveat that travels with the metric: _____

12. Rollback and next route

Pause/rollback condition: _____

SaaS Marketing Attribution - operating rules and measurement governance.

Data Foundation - identity, joins, source precedence, and revenue reconciliation.

Where Did the Money Go? - immediate spend and revenue disagreement.