

DIY Attribution Setup Worksheet

Domain Methods - use this when you need an honest 80/20 attribution layer without pretending duct tape is a board-grade system.

This worksheet is for teams without a dedicated data engineer who still need a practical way to capture source context, compare channel stories, and know when the manual setup has outlived its usefulness.

Step 1: lock the minimum viable capture layer

UTM source, medium, and campaign naming rules are documented in one place. Yes / No

Forms reliably pass source data into the CRM. Yes / No

CRM retains first-touch, latest-touch, and self-reported attribution fields. Yes / No

Opportunity and closed-won linkage exists for the core revenue path. Yes / No

Step 2: define the small scorecard

Primary budget or channel question this setup needs to answer:

Metrics we will track first: source / medium / campaign / qualified pipeline / closed revenue trend / self-reported attribution

What we are explicitly NOT pretending to solve yet:

Step 3: run the monthly trust check

Compare ad-platform story vs CRM outcomes on a sample of recent deals. Done / Not done

Review missing-source rate and campaign naming drift. Done / Not done

Check whether self-reported attribution tells a materially different story. Done / Not done

Note which channels look strong in-platform but weak in pipeline quality. Done / Not done

Step 4: name the stop-trying thresholds now

Leadership now needs one answer that finance, marketing, and RevOps all defend. Yes / No

The sales cycle and buying path are too complex for single-touch logic. Yes / No

The team spends more time repairing the story than using the story. Yes / No

Source capture gaps keep making monthly reviews feel like guesswork. Yes / No

A named owner can no longer maintain the setup without it becoming a second job. Yes / No

How to read the result

Mostly Yes in steps 1-3 and mostly No in step 4: the DIY layer is still useful. Keep it narrow and disciplined.

If two or more stop-trying thresholds are already Yes, you are past the healthy DIY stage. Move into a diagnostic or broader reporting rebuild.

Decision record

Owner of the DIY setup: _____

Next trust-check date: _____

If we cross the line, the next move is: Where Did the Money Go? / Revenue Analytics / another agreed path

The win is not pretending this setup is perfect. The win is getting a cleaner decision today and a clear signal for when patching is no longer safe.