

MARKETING ANALYTICS AND DATA INTEGRATION

From conflicting attribution to connected marketing intelligence

MULTI-LOCATION CONSUMER SERVICES | 2026

Paid social was generating leads, but the final source recorded for an enrollment often obscured how that customer first entered the business. I led the attribution investigation, the BigQuery-based reporting approach and the quality checks needed to make those records more useful in a real budget discussion.

460

Approximately 460 enrolled families linked to earlier Meta leads

\$4,000

Monthly planned budget directed to a combined-channel test

BigQuery

Connected reporting approach using CRM and call-tracking data

THE BUSINESS

A US multi-location consumer-services business acquired enquiries through Google and Meta. Salesforce supported lead follow-up, another system recorded enrollments, and call tracking and agency reporting provided additional views of marketing performance. The engagement is anonymized.

MY ROLE

As the agency-side Senior Account Manager, Growth & Strategy, I diagnosed the reporting discrepancies, identified and led the integration approach, directed the requirements and coordinated technical implementation. I reviewed output accuracy, supervised deduplication and customer-level reconciliation, and presented the commercial interpretation to decision-makers. Technical specialists carried out the platform configuration.

EXPERTISE APPLIED

Attribution-model analysis; data-connection strategy; technical implementation oversight; BigQuery and Salesforce reporting coordination; call-tracking data; deduplication and QA; enrollment reconciliation; marketing investment analysis.

The decision behind the investigation

The owners could see Meta generating enquiries, but Google appeared to account for far more of the final enrollments. That made paid social look less valuable than its lead volume suggested. Leadership needed to decide whether to maintain, reduce or expand spending without mistaking a reporting convention for a complete customer journey.

The starting question was not which platform deserved more credit. It was whether the systems being compared were recording the same event, using the same attribution model and counting the same customers.

What I uncovered and led

1. First touch and last touch were different measures

Marketing reporting emphasized where an enquiry first originated. Salesforce reporting could reflect a later touchpoint after follow-up. Someone might respond to a Meta ad, receive calls and messages, then return through search or a phone call before enrolling. The later event could be recorded as the source even when the original paid enquiry had come from somewhere else.

I worked through the definitions with the team and clients so we could distinguish an initial acquisition source from the last recorded interaction. The two views answered different questions and should not be used interchangeably.

2. Connecting the underlying systems

Explaining the mismatch was not enough. I identified and led a BigQuery-based approach to connect Salesforce and Nimbata call-tracking information within the reporting environment. The technical team configured the connections, while I defined the business requirements, coordinated the implementation and checked whether the resulting metrics represented the intended activity.

The connected reporting view made aggregate call activity available alongside CRM and marketing information. I checked the outputs against source definitions and raised issues where duplicated rows or inconsistent source fields could lead to incorrect conclusions.

3. Counting enrolled families, not status-history records

Historical enrollment files could contain repeated records for a single family as their status changed. Counting every row as a separate household would inflate the numbers. I led QA to ensure deduplication took place, then reviewed the reconciliation of unique enrolled families with their earlier lead records.

That analysis identified approximately 460 enrolled families with an earlier Meta lead record whose journey was not adequately captured by a simple final-source interpretation. The figure identifies a recorded association with an original Meta enquiry, not 460 customers proved to have enrolled because of Meta alone.

The commercial outcome

Rather than cutting Meta because it appeared weak in the final-source view, the owners maintained their existing Meta investment for the quarter. They also directed \$4,000 per month of planned additional spending toward a combined Meta and Google test.

The work improved the basis for that decision. It brought the distinction between acquisition and final touch into focus, connected additional CRM and call-tracking evidence, and validated customer counts before interpreting performance. It showed why trustworthy marketing reporting depends on the data design beneath a dashboard, not only on the dashboard itself.