1. ERD diagram

Marketing Source

campaign_id	PK
campaign_name	
utms	
delivery_metrics	
conversion_metrics	
campaign_dates	

Leads

lead_id	PK
campaign_id	FK
enrichment_id	FK
crm_id	FK
PII	
company_data	
status	
lead_dates	

CRM

crm_id	PK
lead_id	FK
sales_rep	
opportunity_metrics	
stage	
opportunity_dates	

Enrichment Metadata

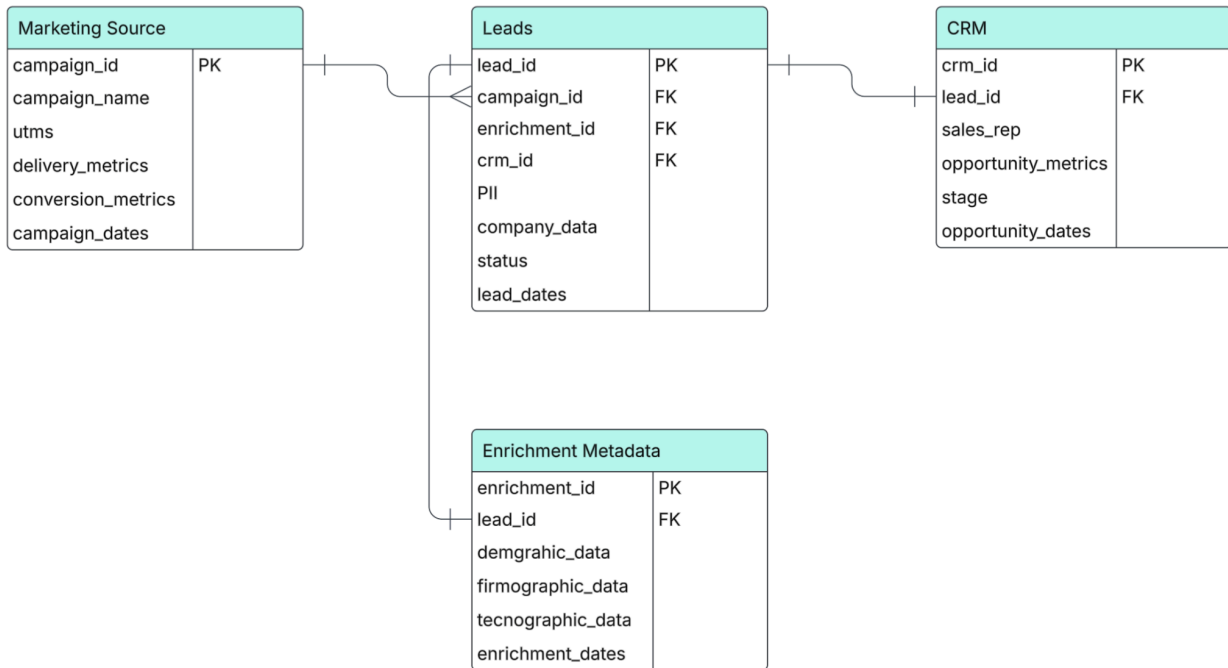| enrichment_id	PK
lead_id	FK
demgrahic_data	
firmographic_data	
tecnographic_data	
enrichment_dates	

2. Data pipeline

Raw data from Marketing Platforms, HubSpot, Apollo and Salesforce can be loaded into Snowflake tables through an in-house solution (extracting from each platform API endpoints via a serverless service from any cloud provider) or using a third party tool (Stitch, Fivetran, Airbyte, others).
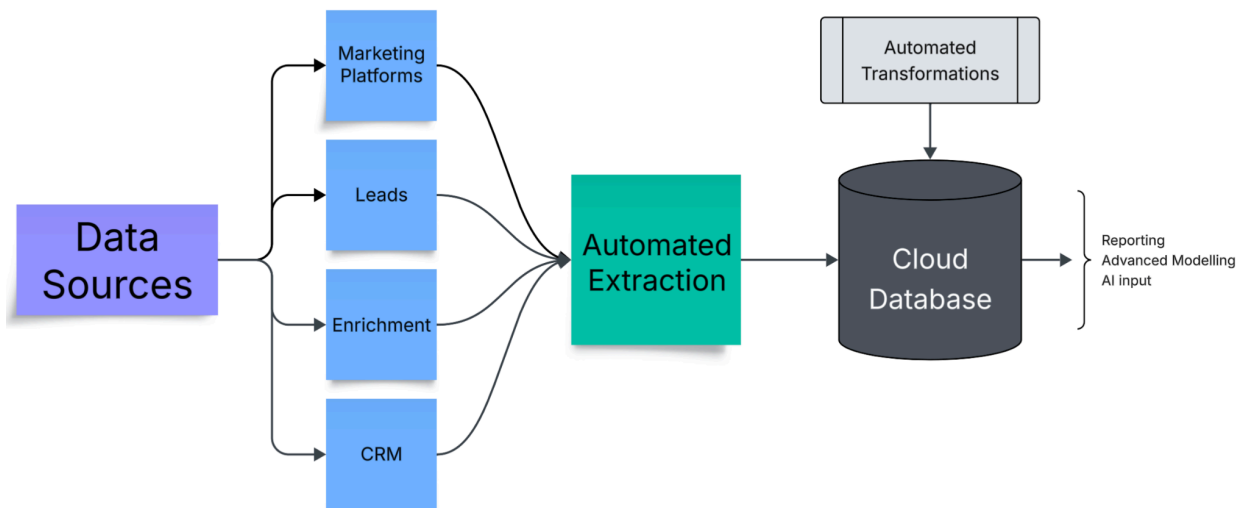
3. dbt Model

models/staging/ads_facebook/stg_facebook.sql with its YAML file

```sql
select
    campaign_id,
    campaign_name,
    utm_source,
    utm_medium,
    spend,
    impressions,
    clicks,
    conversions,
    created_date as created_at,
    updated_date as updated_at,
    end_date as ended_at
from {{ ref('raw_facebook_campaigns') }}
```

models/staging/leads/stg_hubspot.sql with its YAML file

```sql
select
    id as lead_id,
    campaign_id,
    enrichment_id,
    crm_id,
    email,
    name,
    created_date as created_at
from {{ ref('raw_hubspot_leads') }}
```

models/staging/enrichment/stg_apollo.sql with its YAML file

```sql
select
    id as enrichment_id,
    lead_id,
    company_name,
    job_title,
    enriched_at
from {{ ref('raw_apollo_enrichment') }}
```

models/staging/crm/stg_salesforce.sql with its YAML file

```sql
select
    id as crm_id,
    lead_id,
    sales_rep,
    stage,
    opportunity_value,
    converted_at,
from {{ ref('raw_salesforce_opportunities') }}
```

models/marts/business/lead_funnel.sql with its YAML file

```sql
select
    l.lead_id,
    l.email,
    l.name,
    l.created_at,
    s.campaign_name,
    s.utm_source,
    s.utm_medium,
    e.company_name,
    e.job_title,
    CASE WHEN c.stage IS NULL THEN 'Open' ELSE c.stage END as stage,
    c.opportunity_value,
    c.converted_at
from {{ ref('stg_hubspot') }} l
left join {{ ref('stg_facebook') }} s
 on l.campaign_id=s.campaign_id
left join {{ ref('stg_apollo') }} e
 on l.enrichment_id = e.enrichment_id
left join {{ ref('stg_salesforce') }} c
 on l.lead_id = c.lead_id
```

Key findings

The best performing channel on a single-touch attribution model has been Organic Search, followed by Paid Search and Social. These last two are probably contributing with the Organic Search attribution, but a multi-touch model is necessary to measure their impact.

There is an upward trend in lead generation on a monthly basis and the company should focus on the top three, while considering improving tracking (as there is a fifth of leads with unknown origin and this pool has a strong conversion rate compared with the top performing channels).

Display doesn't seem to be a good bet, it should probably be measured with a different KPI as it is a channel that brings more awareness.