



Revenue Cycle Model Deployment Flow

3-26-10

Updated

4-12-10

Updated

4-20-10

Updated

5-13-10

Agenda

- ▶ Walk through design proposal for completing deployment within the Revenue Stage Modeler

Deploying a new model – getting existing leads into the RSM

➤ Design Framework

- Provide users the ability to complete deployment within the context of the RSM
- Leverage existing functionality / familiarity of interaction paradigms
 - Minimize modification
 - Adapt as needed to current context
- Facilitate user independence by providing status of initial ‘lift’ of leads into the RSM (Home page)

➤ **Design Issue:** Evaluate whether the ability to close the tabs is necessary for the user experience to communicate completion. We may need two buttons:

‘Deploy Model’ and ‘Initialize Existing Leads’

Note: ‘Initialize’ is too technical of word

View of Tree with RSM Smart List



First Experience - Existing Customers

- **Get Ready**– Play / build models actions are reversible
- **Get Set** – system provisions stages
- provides the ui for creating batch campaigns for getting leads into stages
- checks transitions for activation / enabled
- **GO!** – Approve Model
- Messages about the 'path of no return'

The screenshot shows the Marketo Revenue Stage Modeler interface. The top navigation bar includes 'My Marketo', 'Marketing Activities', 'Design Studio', 'Lead Database', 'Analytics', and 'Forecasting'. The user is logged in as MBacigalupi. The left sidebar shows a tree view under 'Analytics' with 'Revenue Stage Modeler' expanded, containing 'My Models' (with 'My RSM 1' selected) and 'Marketo Examples' (with 'Example 1', 'Example 2', and 'Example 3'). The main workspace is titled 'RSM Actions v' and contains three action cards: 'Get Ready' (Define how you want your reports to be structured), 'Get Set' (Set you existing leads into stages), and 'GO!' (Approve your model and leverage your data now). To the right, a 'LEADS Default' pie chart shows 'Anonymous Leads' (30,375) and 'Known Leads' (86,957). The chart is updated as of Apr 09, 2010 03:10 am CDT.

View of Tree with RSM Smart List



- **Get Ready** – Play / build models actions are reversible
- **Get Set** – system provisions stages
- provides the ui for creating batch campaigns for getting leads into stages
- checks transitions for activation / enabled
- **GO!** – Approve Model
- Messages about the 'path of no return'

On Going Use - Edit Draft

The screenshot displays the Marketo 'RSM Actions v' interface. On the left, a tree view shows the navigation structure: Analytics > Revenue Stage Modeler > My Models > My RSM 1 - Draft. The main content area features three action buttons: 'Get Ready' (Define how you want your reports to be structured), 'Get Set' (Set you existing leads into stages), and 'GO!' (Approve your model and leverage your data now). To the right, a 'LEADS Default' pie chart shows the distribution of leads, with a legend for 'Anonymous Leads' (blue) and 'Known Leads' (green). The chart is updated as of April 09, 2010, at 03:10 am CDT. The top navigation bar includes 'My Marketo', 'Marketing Activities', 'Design Studio', 'Lead Database', 'Analytics', and 'Forecasting'. The user is logged in as MBacigalupi.

Default View Before RSM Build



Logged in as: MBacigalupi Logout Admin Help

Marketo

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Approve Model Activate Transitions Auto Save

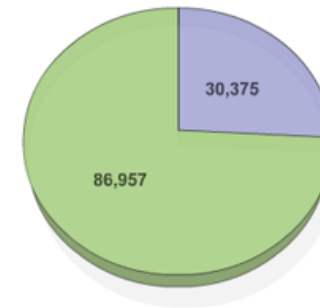
- Analytics
 - Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

My RSM 1

Assign Leads

Stages	Leads
Anonymous	30,375
Known	86,957
Total Leads:	117,332

LEADS
Default



Anonymous Leads
Known Leads

All Time
Updated Apr 09, 2010 03:10 am CDT

RSM Model Built



Marketo Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Approve Model | Activate Transitions | Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Happy Path

Alternate Route

Stage Properties ➔ Transition Properties

Transitions From

Order	Move	To Stage	Description	Enable	Edit	Delete
1		* Qualified		<input type="checkbox"/>		
2		Click to Add Transition		<input type="checkbox"/>		

** Indicates default Transition*

Approve Model Available

Marketo Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Approve Model Activate Transitions Auto Save

My RSM 1

Assign Leads

Stages	Leads
Anonymous	30,375
Known	86,957
Prospect	
Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	
Total Leads:	117,332

LEADS Default

30,375
86,957

■ Anonymous Leads
■ Known Leads

All Time
Updated Apr 09, 2010 03:10 am CDT

Click on Approve Model

Guard Rails for Approving a Selected Model



Marketo

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My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Approve Model Activate Transitions Auto Save

My RSM 1

Approve Model

IMPORTANT!
Once approved you cannot select another model to approve but will need to edit this one.

Approve Model Cancel

	Sales Lead	
	Qualified	
	Oppty	
	Won	
	Inactive	
	Recycled	
	Disqual	
	Lost	
	Total Leads:	117,332

30,375
86,957

Anonymous Leads
Known Leads

All Time
Updated Apr 09, 2010 03:10 am CDT

Analytics

- Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Model Approved



Marketo

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My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Approve Model Activate Transitions Auto Save

My RSM 1

Approve Model

You may now move leads into selected stages and activate stage to stage transitions.

OK

Lead		
Sales Lead		
Qualified		
Oppty		
Won		
Inactive		
Recycled		
Disqual		
Lost		
Total Leads:	117,332	

Lead Type	Count
Anonymous Leads	30,375
Known Leads	86,957

All Time
Updated Apr 09, 2010 03:10 am CDT

- Analytics
 - Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Stage List Built Out from Model

Marketo

Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Activate Transitions Auto Save

My RSM 1

Assign Leads

LEADS Default

Activate becomes enabled as does Assign Leads

Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	

Total Leads: 117,332

30,375

86,957

Anonymous Leads

Known Leads

All Time

Updated Apr 09, 2010 03:10 am CDT

Stage List Built Out from Model

Marketeto Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Activate Transitions Auto Save

My RSM 1

Analytics

- Revenue Stage Modeler
 - My Models
 - My RSM 1
- Marketo
 - Example 1
 - Example 2
 - Example 3

LEADS Default

Lead Type	Count
Anonymous	30,375
Known	86,957
Prospect	
Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	
Total Leads:	117,332

Updated Apr 09, 2010 03:10 am CDT

User selects Activate Transitions

Stage List Built Out from Model



Marketo

Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Activate Transitions

⚠ All 'Enabled' Transitions have now been activated.

OK

Stages

Prospect	
Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	

Total Leads: 117,332

Lead Type	Count
Anonymous Leads	30,375
Known Leads	86,957

All Time
Updated Apr 09, 2010 03:10 am CDT

Stage List Built Out from Model

Marketo

Logged in as: MBacigalupi Logout Admin Help

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Assign Leads

Stages	Leads
Anonymous	30,375
Known	86,957
Prospect	
Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	
Total Leads:	117,332

LEADS Default

All Time
Updated Apr 09, 2010 03:10 am CDT

Anonymous Leads
Known Leads

User selects a stage and then selects 'Assign Leads'

Campaign UI as the methodology to get leads into stages

The screenshot displays the Marketo Campaign UI. At the top, the user is logged in as MBacigalupi. The navigation bar includes 'My Marketo', 'Marketing Activities', 'Design Studio', 'Lead Database', 'Analytics', and 'Forecasting'. The current view is 'My RSM 1' in 'Modeler' mode. A sidebar on the left shows 'Analytics' with 'Example 1', 'Example 2', and 'Example 3'. The main content area shows a 'Smart List' configuration for 'Prospect'. The 'Smart List' tab is active, with sub-tabs for 'Flow', 'Schedule', and 'Results'. The 'View Campaign Members' section is visible, along with a 'Lead Score' filter set to 'between 0 and 65'. A 'Filters' panel on the right lists various triggers and filters, including 'Lead History', 'Email', 'Alert Was Sent', 'Campaign was Requested', 'Click Link', 'Data Value Changed', 'Filled Out Form', 'Had Interesting Moment', 'Lead was Created', 'Revenue Stage was Changed', 'Score was Changed', 'Visited Web Page', 'Was Added to List', 'Was Removed from List', 'Lead Attributes', 'Company Attributes', 'Salesforce', 'Special Filters', and 'Inactivity Filters'. Three orange callout boxes provide additional context: 'Pop up with restricted campaign functionality' points to the 'Analytics' sidebar; 'View Campaign Members opens in a new tab' points to the 'View Campaign Members' button; and 'All Trigger campaigns are removed' points to the 'Filters' panel.

Campaign UI as the methodology to get leads into stages

Marketo

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Marketeto | batch2 (Flow) • Marketing Activities

https://app.marketo.com/#SC1014C3!

Close Help

Marketeto Prospect

Smart List Flow Schedule Results

View Campaign Members

Collapse All Expand All

Auto-Save: no changes

Find...

1 - Change Revenue Stage

New Revenue Stage: Prospect

Add Choice

- Flow Actions
 - Add to List
 - Change Data Value
 - Change Score
 - Delete Lead
 - Remove from Flow
 - Remove from List
 - Request Campaign
 - Send Alert
 - Send Email
 - Wait
- Salesforce Actions
 - Add to SFDC Campaign
 - Change Owner
 - Change Status in SFDC Ca
 - Convert Lead
 - Create Task
 - Delete Lead from SFDC
 - Remove from SFDC Camp

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Defaults to selected stage.
Lists all stages.

Campaign UI as the methodology to get leads into stages

Marketo

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My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Marketeto | batch2 (Schedule) • Marketing Activities

https://app.marketo.com/#SC1014D4!

Close Help

Marketeto Prospect

Smart List Flow **Schedule** Results

View Campaign Members Run Once

Campaign Schedule

Last run: Apr 15, 2010 08:13 pm PDT

Smart List Mode: Batch

Qualification Rules: [Run flow once](#)

Smart List Status: Set to affect around [64 existing leads](#) (may change over time)
Around 7 leads are blocked from mailings

Recurrence: No repeating schedule has been set

Recurrence Schedule option is removed

Campaign UI as the methodology to get leads into stages



Marketo

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My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Marketo | batch2 (Results) • Marketing Activities

https://app.marketo.com/#SC1014E5!

Close Help

Marketo Prospect

Smart List Flow Schedule **Results**

View Campaign Members

Filter: None

ID	Date/Time (PDT)	Activity Type	Detail	Lead Name	Company
272	Mar 27, 2010 06:50 pm	Change Data Value	Changed Lead Score from "5" to "10"	Lilly Xia	marketo
271	Mar 27, 2010 06:50 pm	Change Score	Changed Lead Score from "5" to "10"	Lilly Xia	marketo

Page 1 of 1 Export Quick Find... 1-2 of 2 items

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Campaign UI as the methodology to get leads into stages



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My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Edit Model Deactivate Transitions Auto Save

My RSM 1

Assign Leads

Stages	Leads
Anonymous	30,375
Known	63,957
Prospect	23,000
Lead	
Sales Lead	
Qualified	
Oppty	
Won	
Inactive	
Recycled	
Disqual	
Lost	
Total Leads:	117,332

LEADS Default

All Time
Updated Apr 09, 2010 03:10 am CDT

Completion of getting leads into stages



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Marketo

My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model

Auto Save

- Analytics
 - Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Total Leads: 117,332

Stages	Leads
* Anonymous	2,000
* Known	
Prospect	10,000
Lead	4300
Sales Lead	6900
Qualified	3567
Opppty	2345
Won	2008
Inactive	1045
Recycled	2300
Disqual	1023
Lost	2090

* default stages

LEADS
Default



All Time
Updated Apr 09, 2010 03:10 am CDT

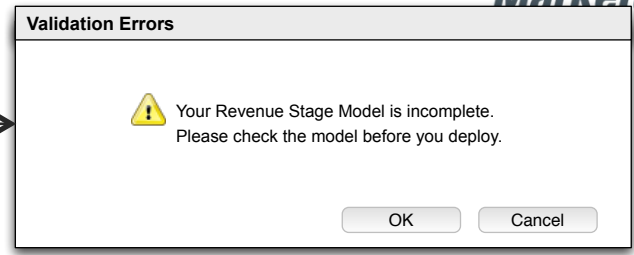
Anonymous 2,000

Full Screen Export

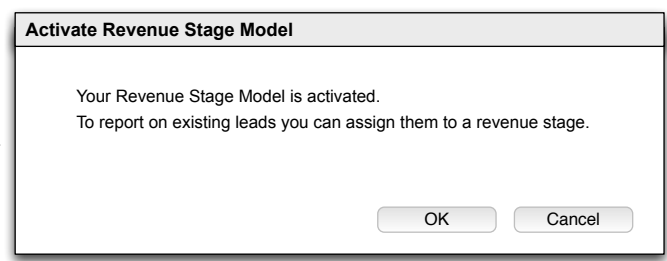
Make the table exportable

Model States

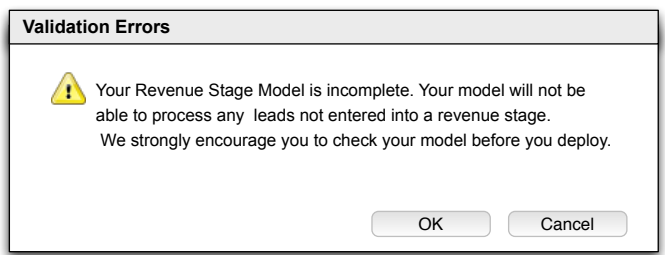
- Not Validated / Existing Leads not Assigned



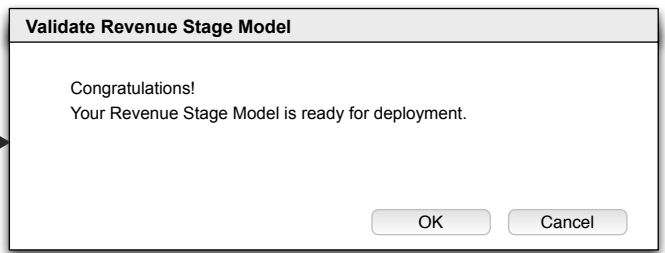
- Activate Model / Existing Leads not Assigned



- Not Validated / Existing Leads Assigned



- Validated / Existing Leads Assigned



Deployment Behavior

- ♦ Deployment Behavior
 - When user selects the “Deploy” button the system will run a check for
 - Model validated for completeness (ie values entered)
 - User will be prompted to go and make corrections
 - Existing leads assigned to stages (not necessarily all)
- ♦ It messages what can or cannot happen after deployment

