Revenue Cycle Model Deployment Flow

3-26-10
Updated
4-12-10
Updated
4-20-10
Updated
5-13-10

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Agenda

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

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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

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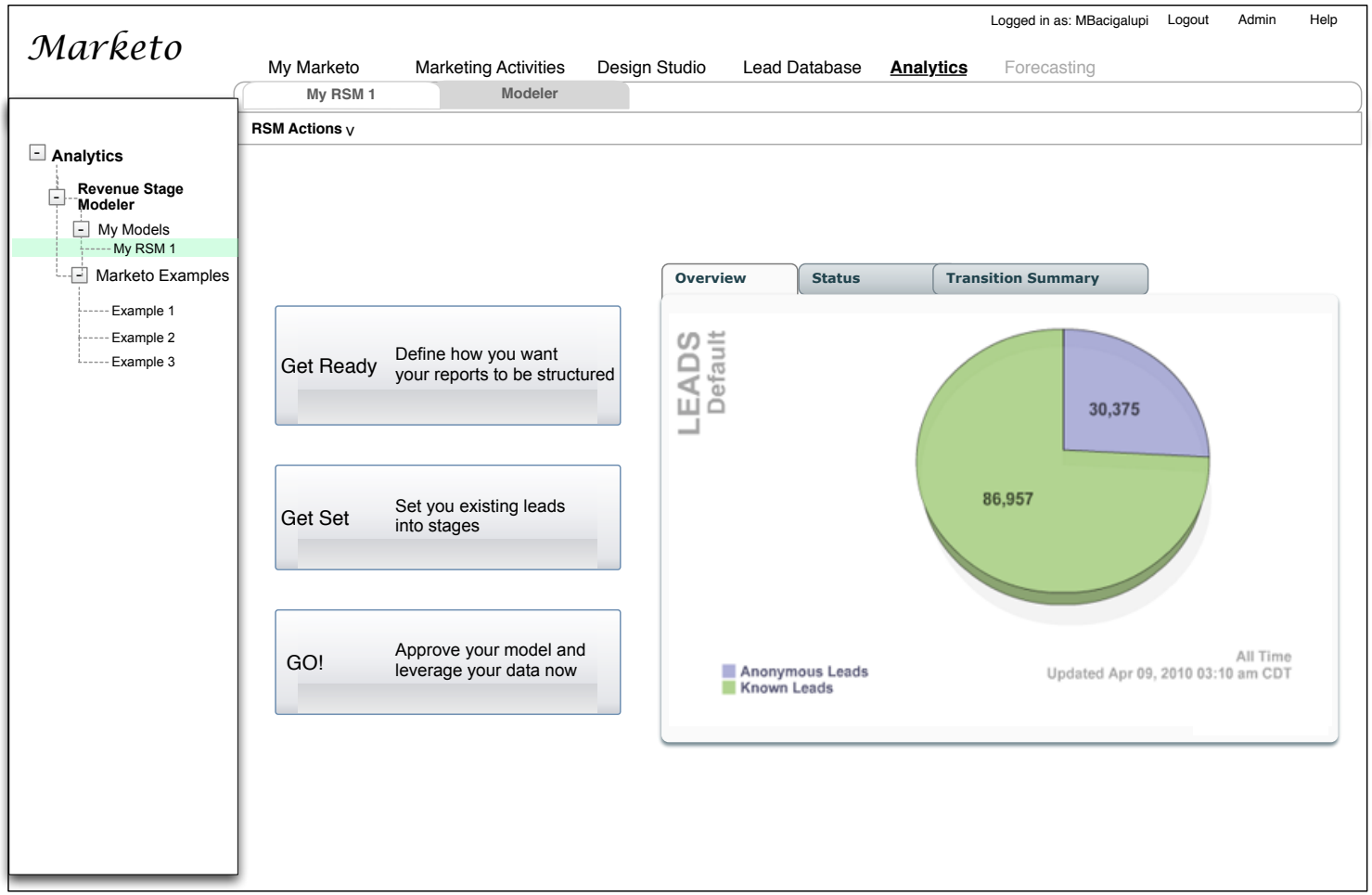
View of Tree with RSM Smart List

- **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'

First Experience - Existing Customers



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- provides the ui for creating batch campaigns for getting leads into stages
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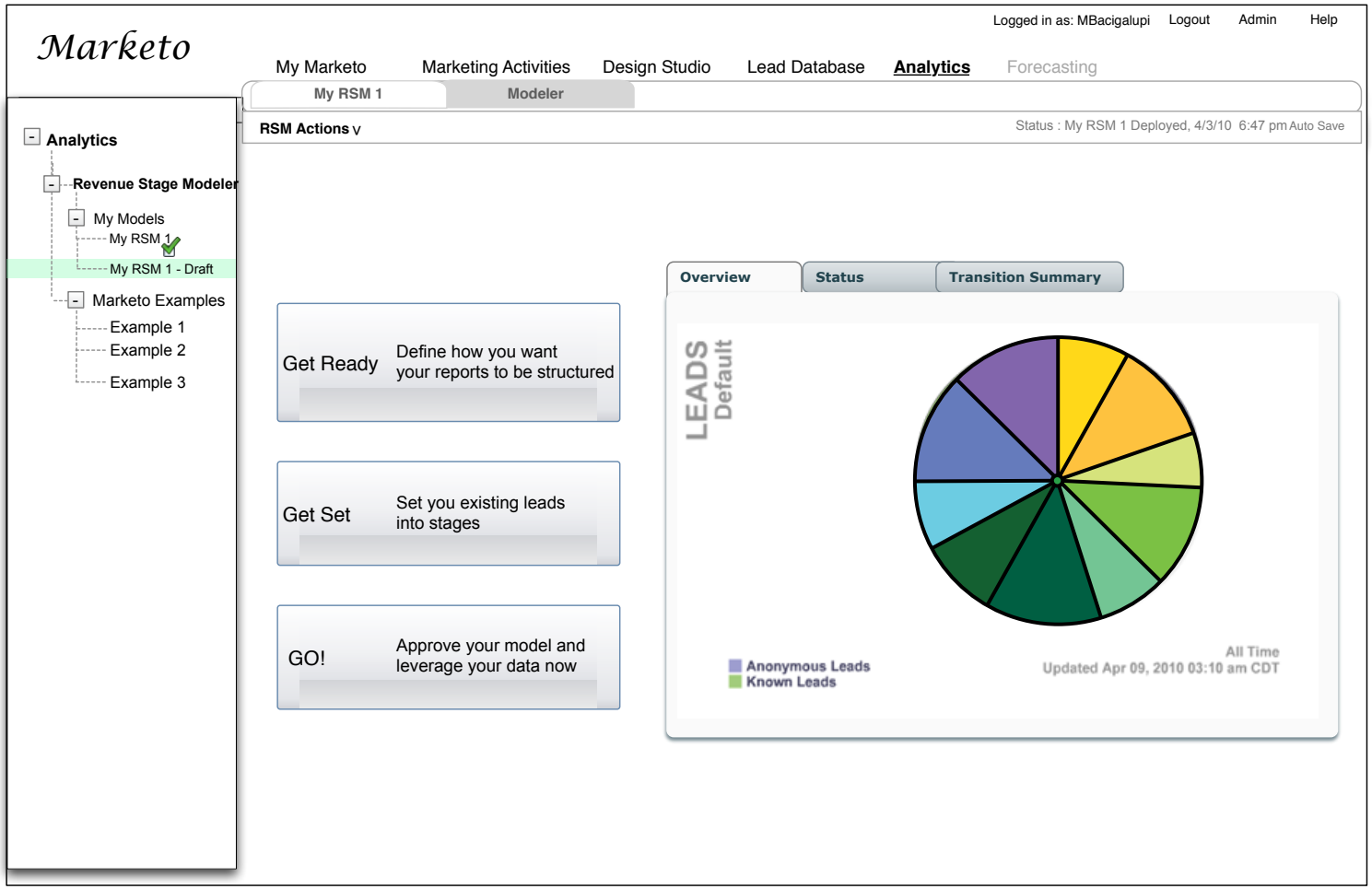
On Going Use - Edit Draft



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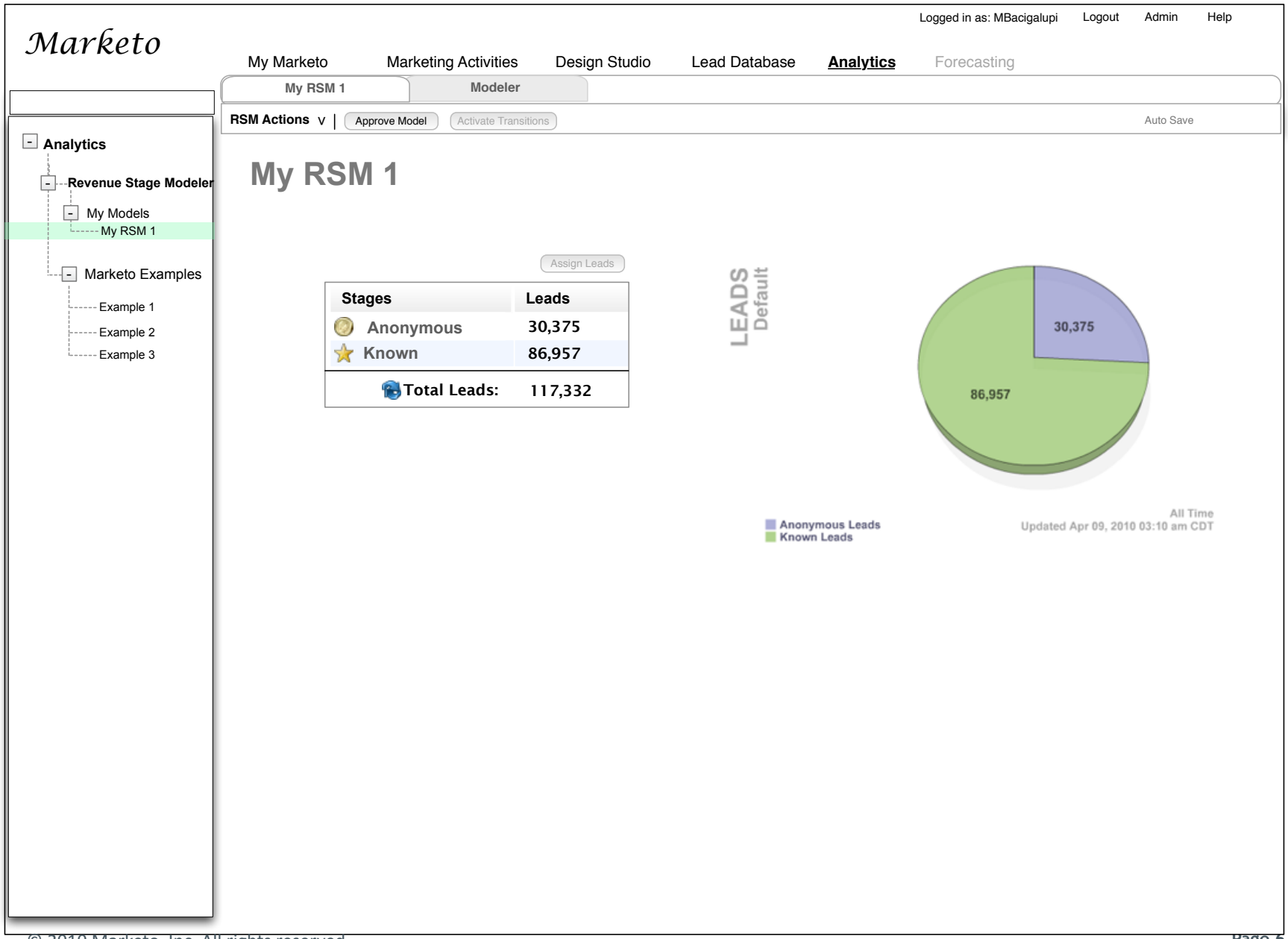
Default View Before RSM Build



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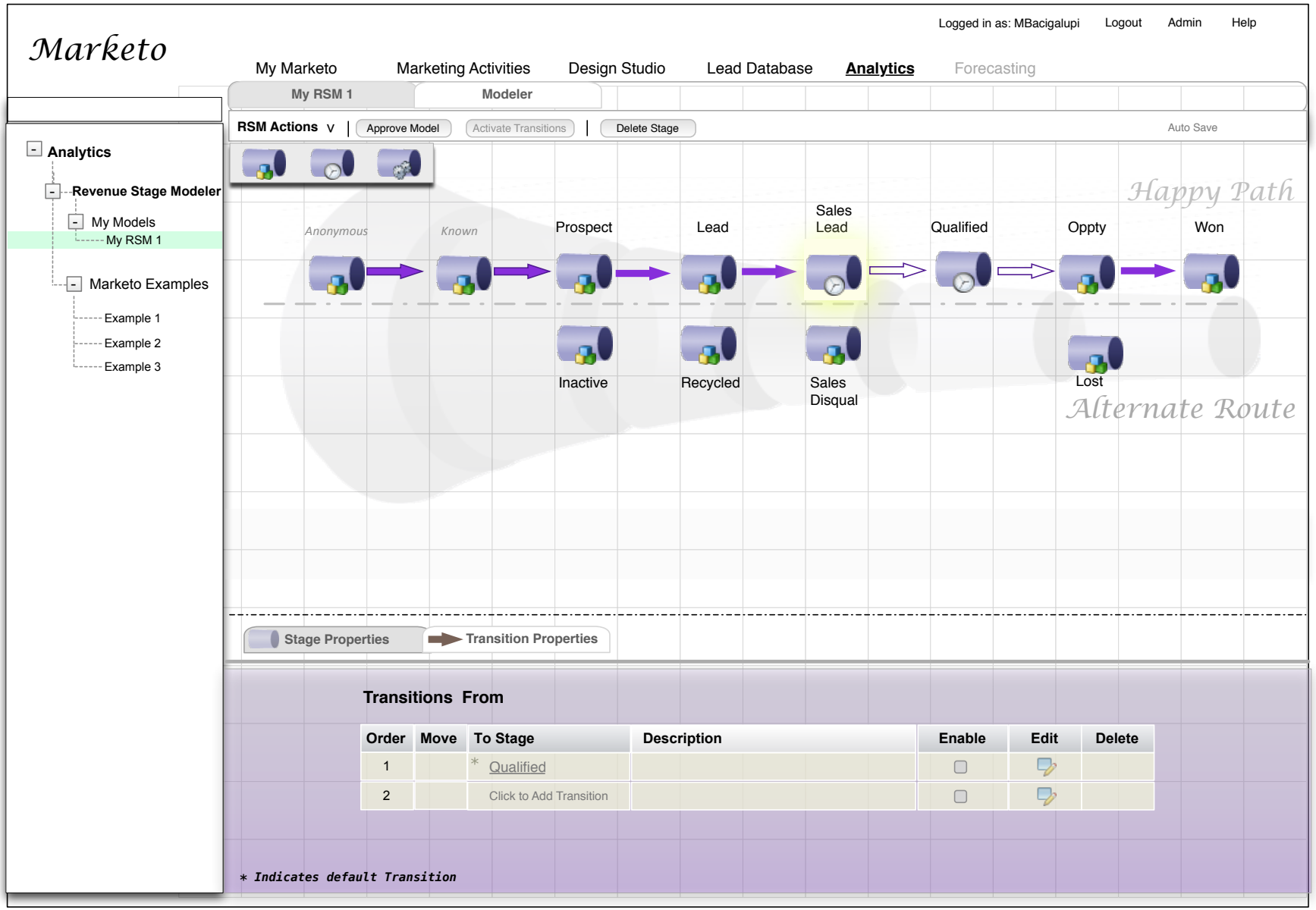
RSM Model Built



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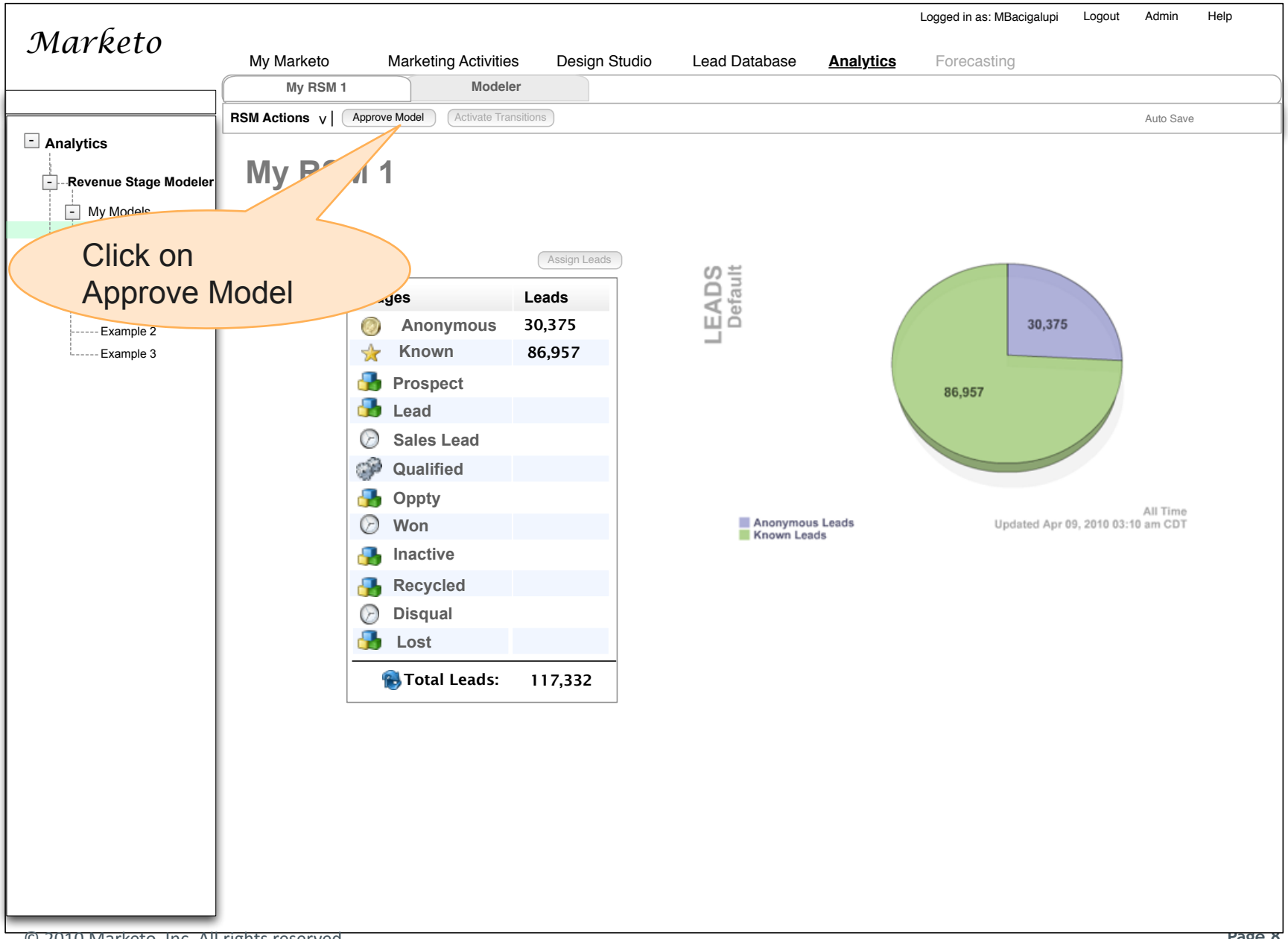
Approve Model Available



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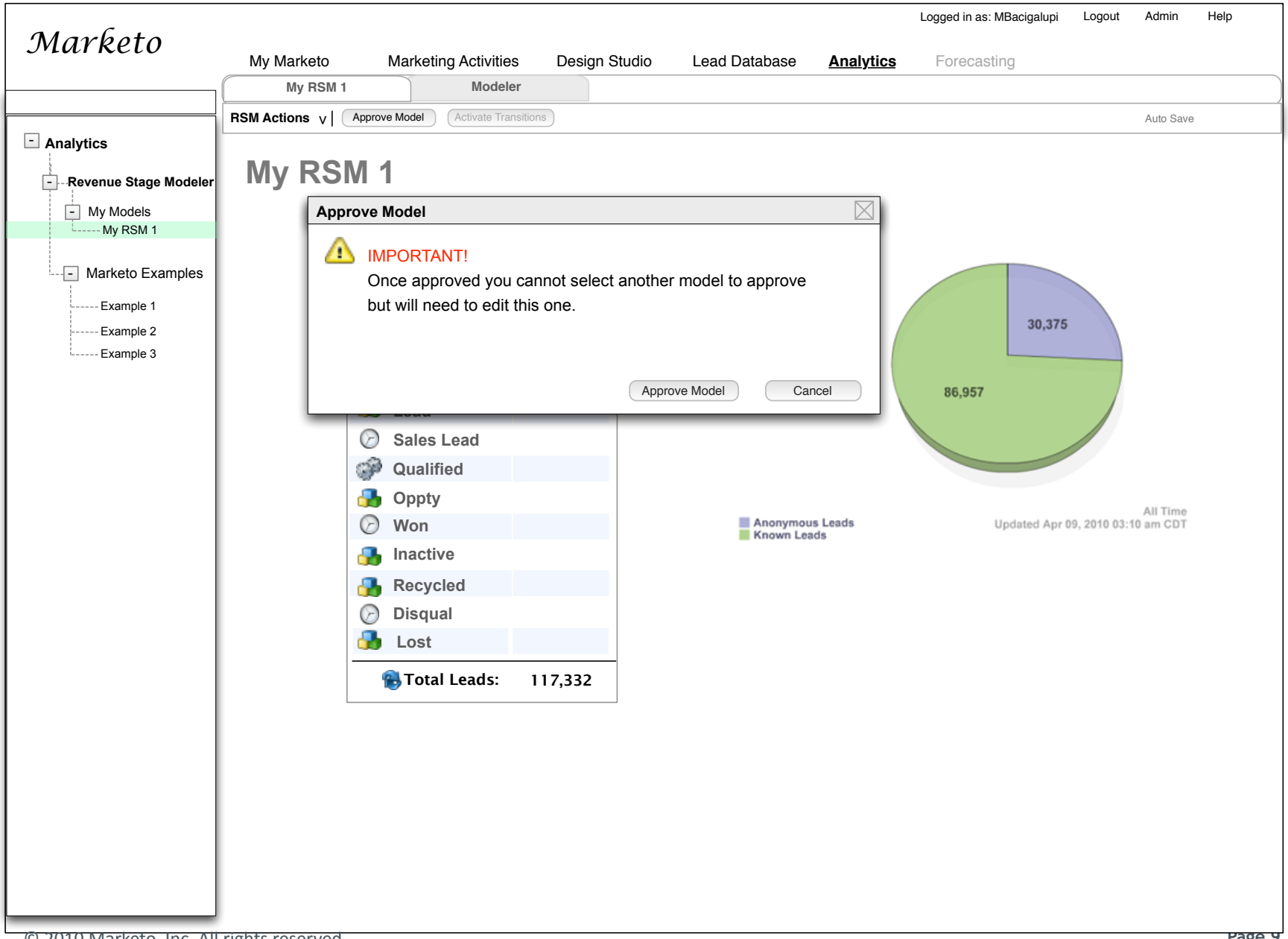
Guard Rails for Approving a Selected Model



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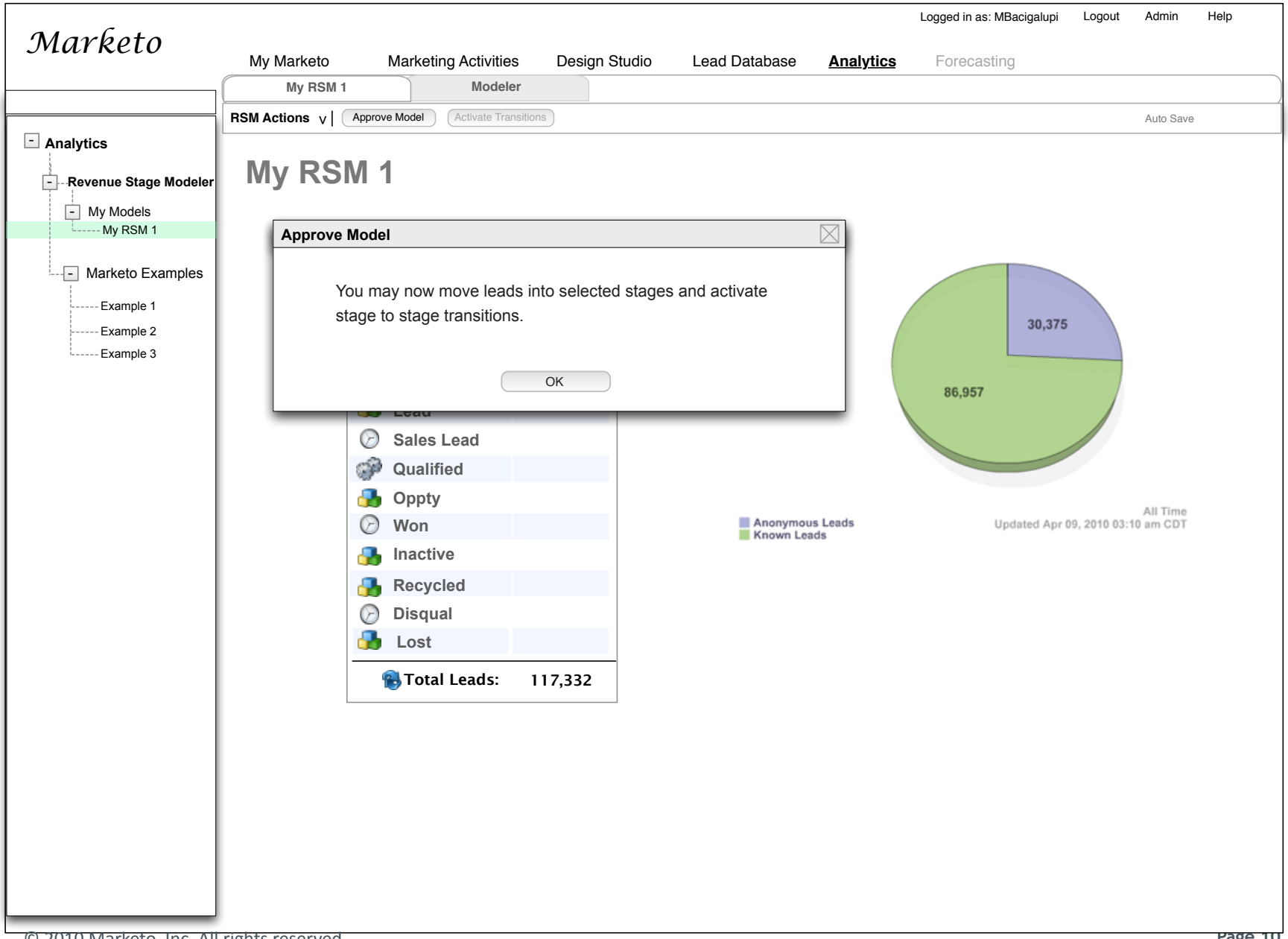
Model Approved



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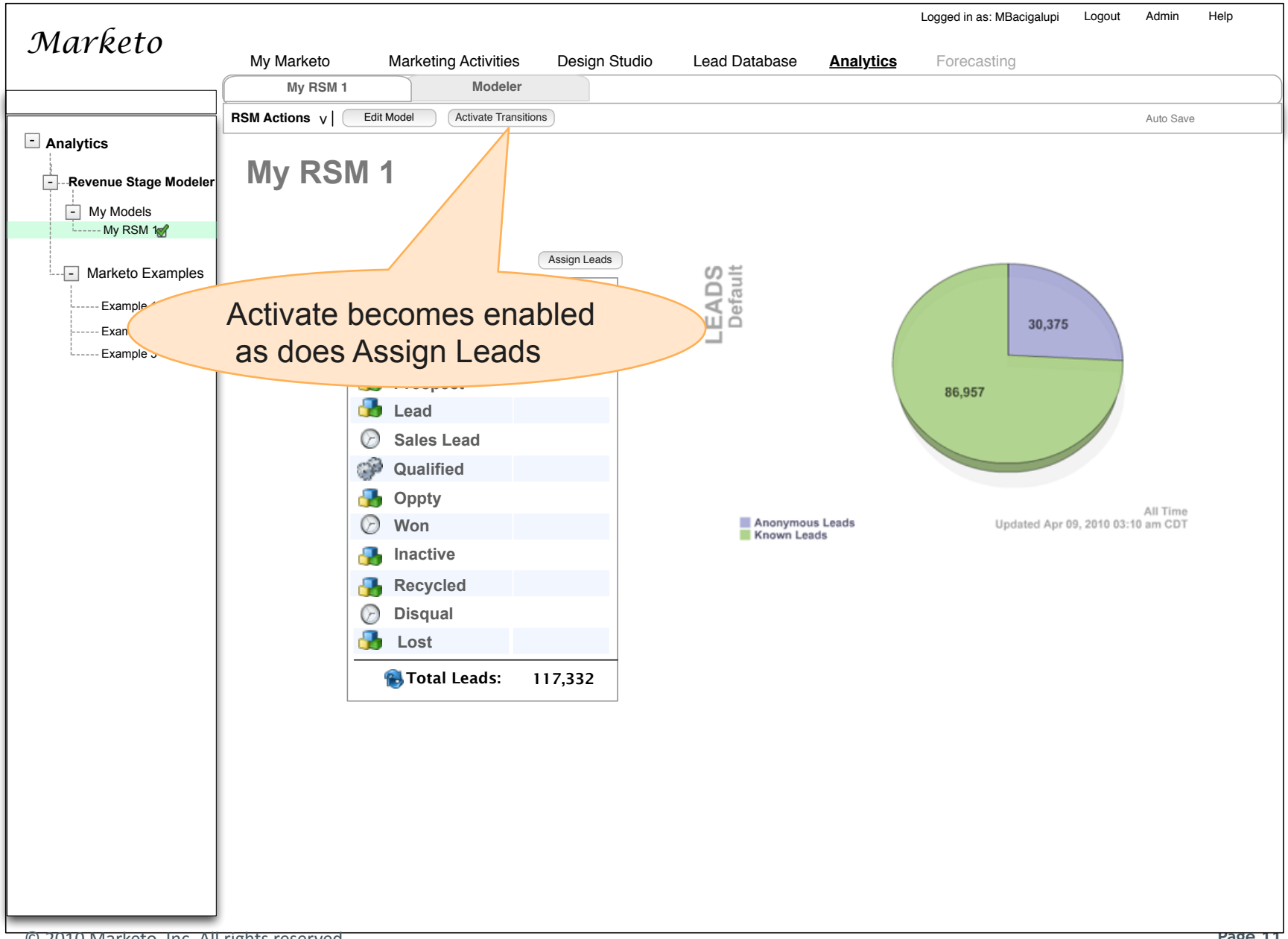
Stage List Built Out from Model



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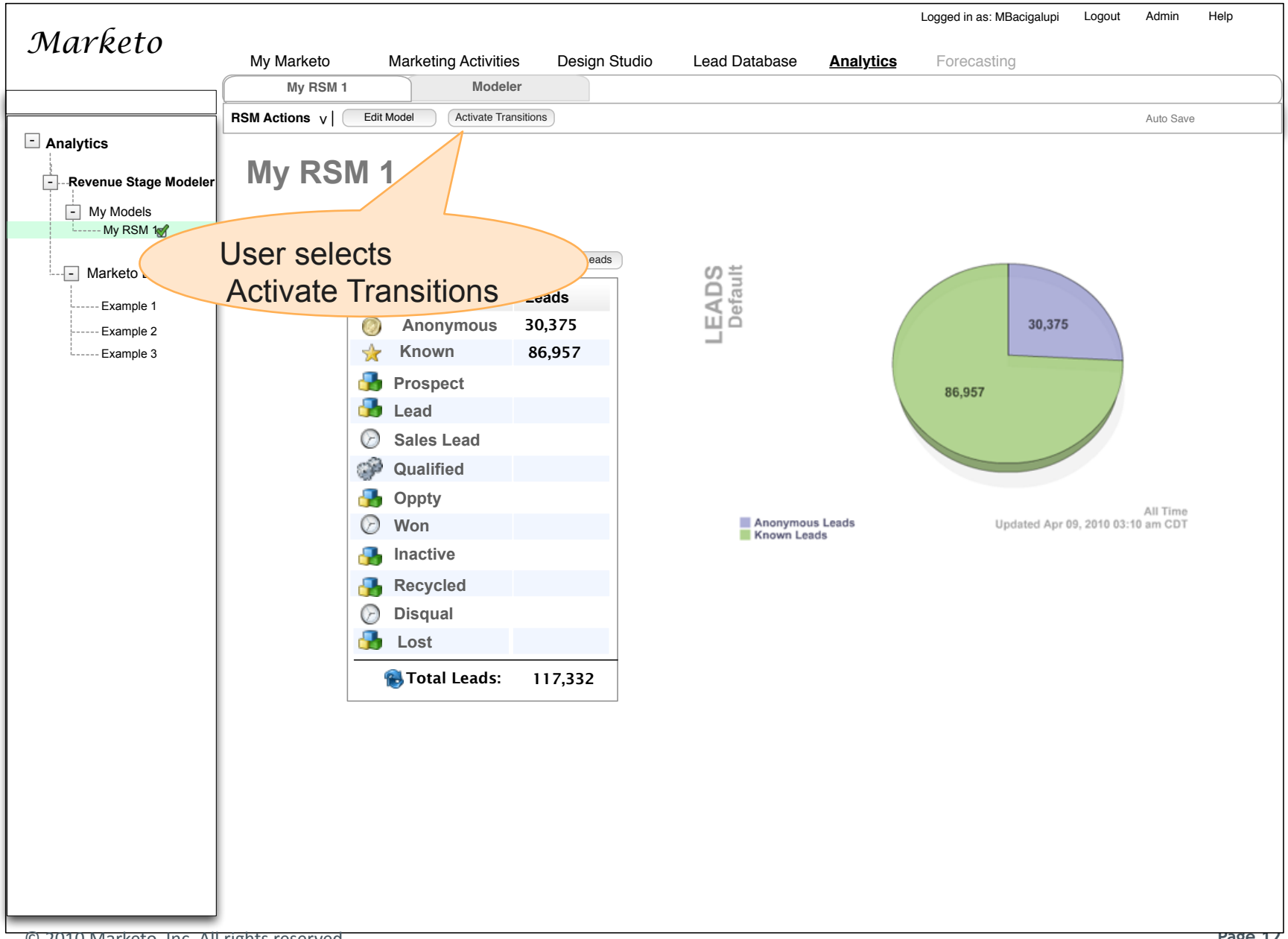

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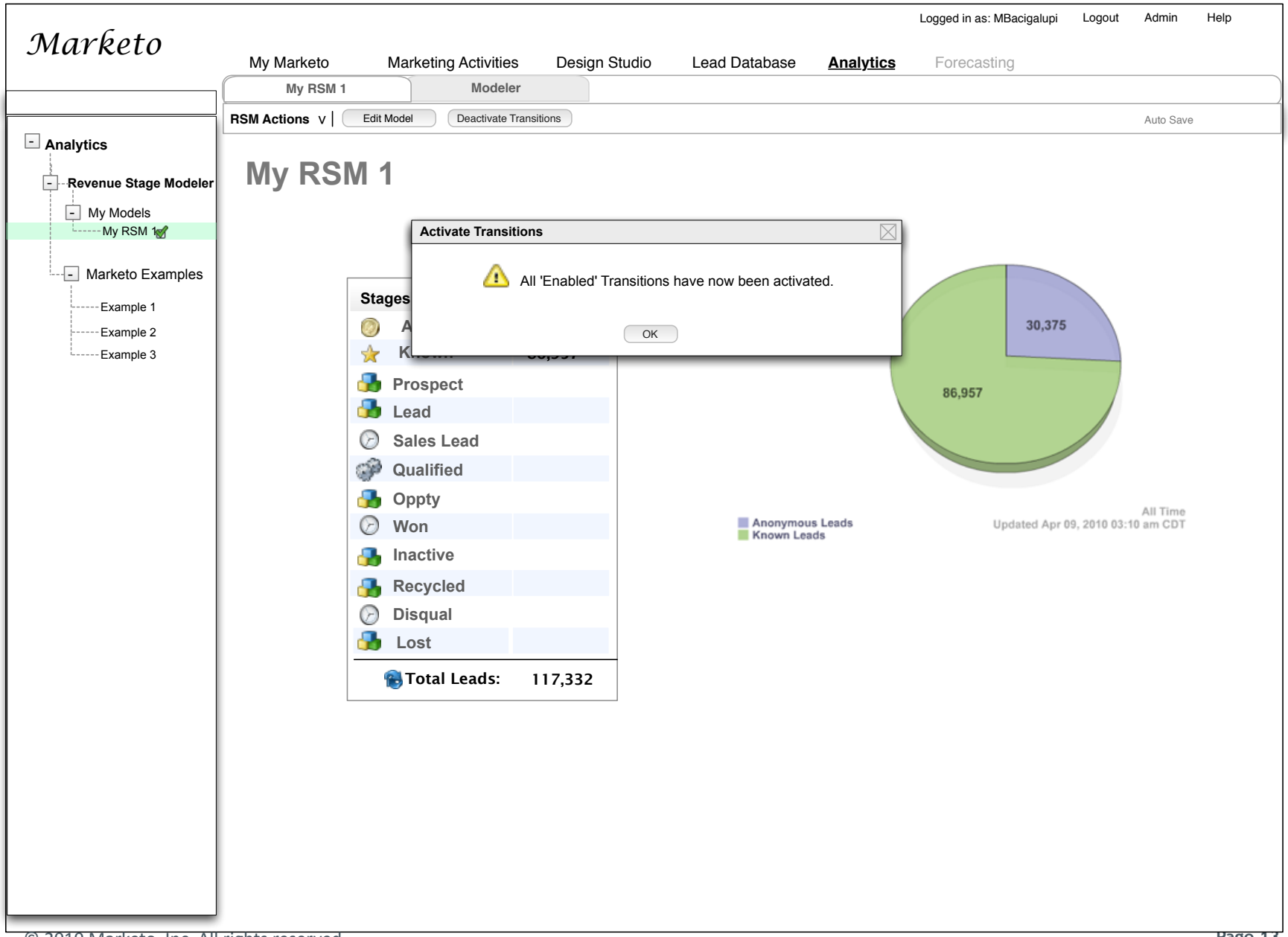

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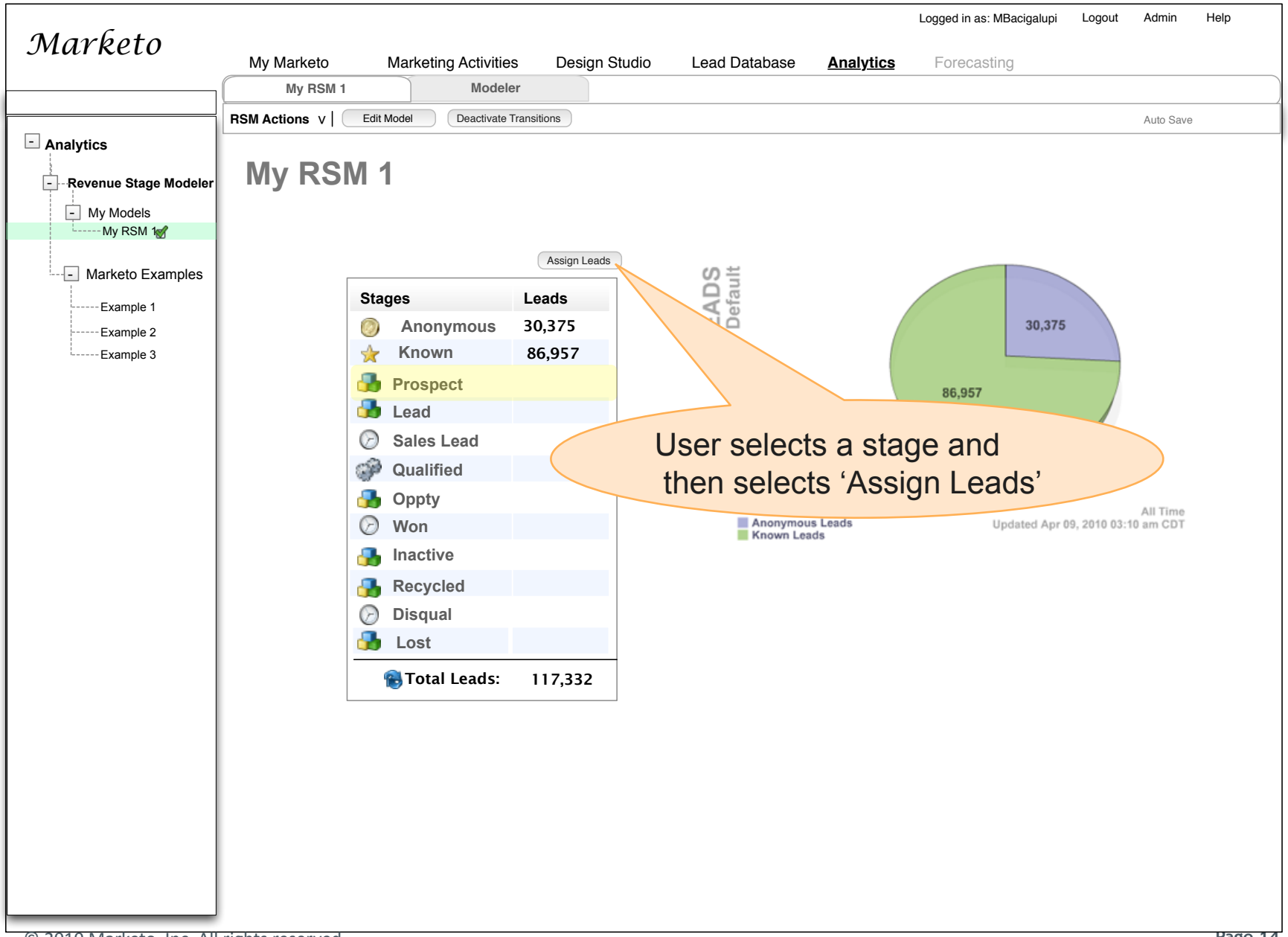

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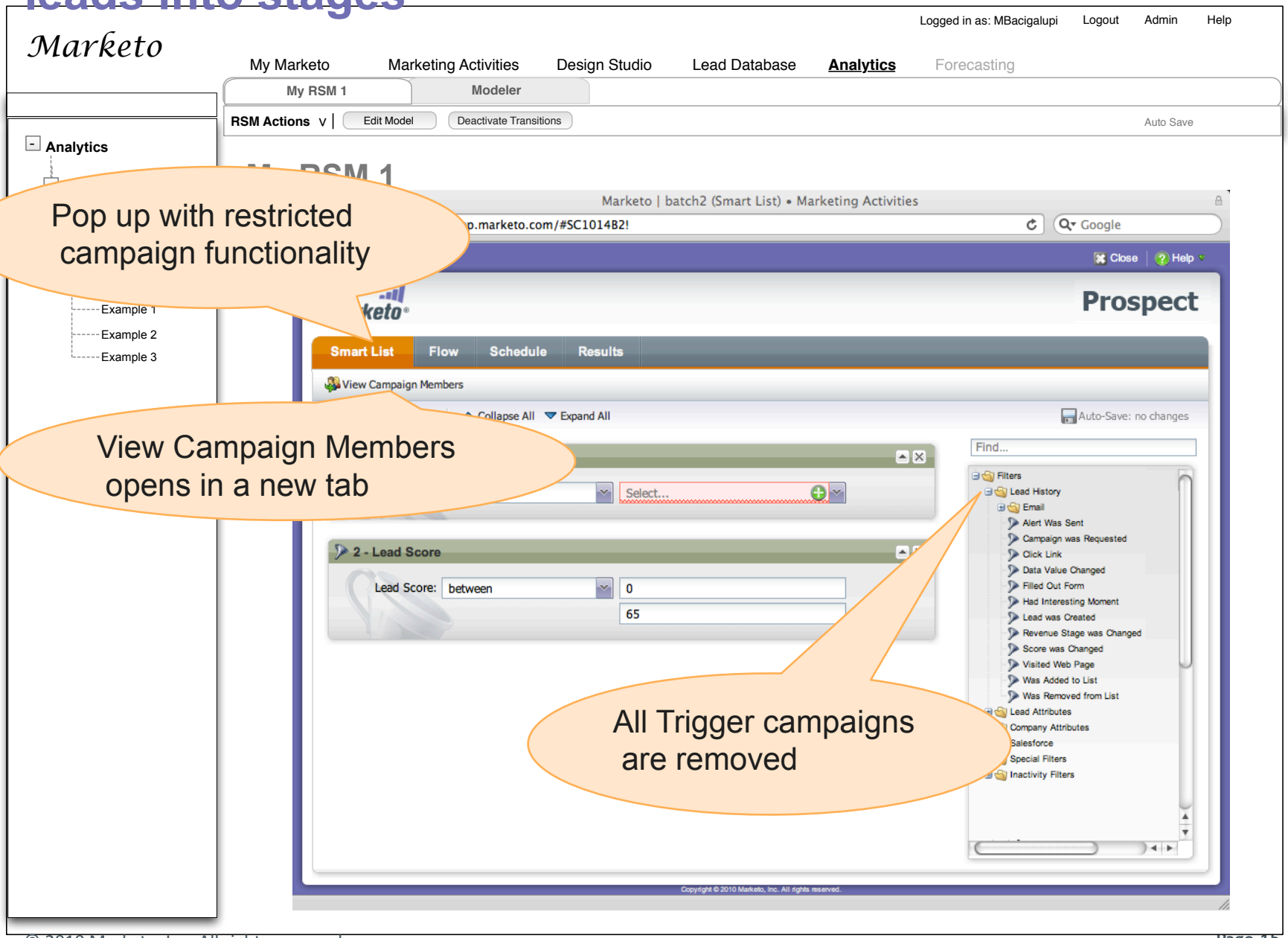
Campaign UI as the methodology to get leads into stages



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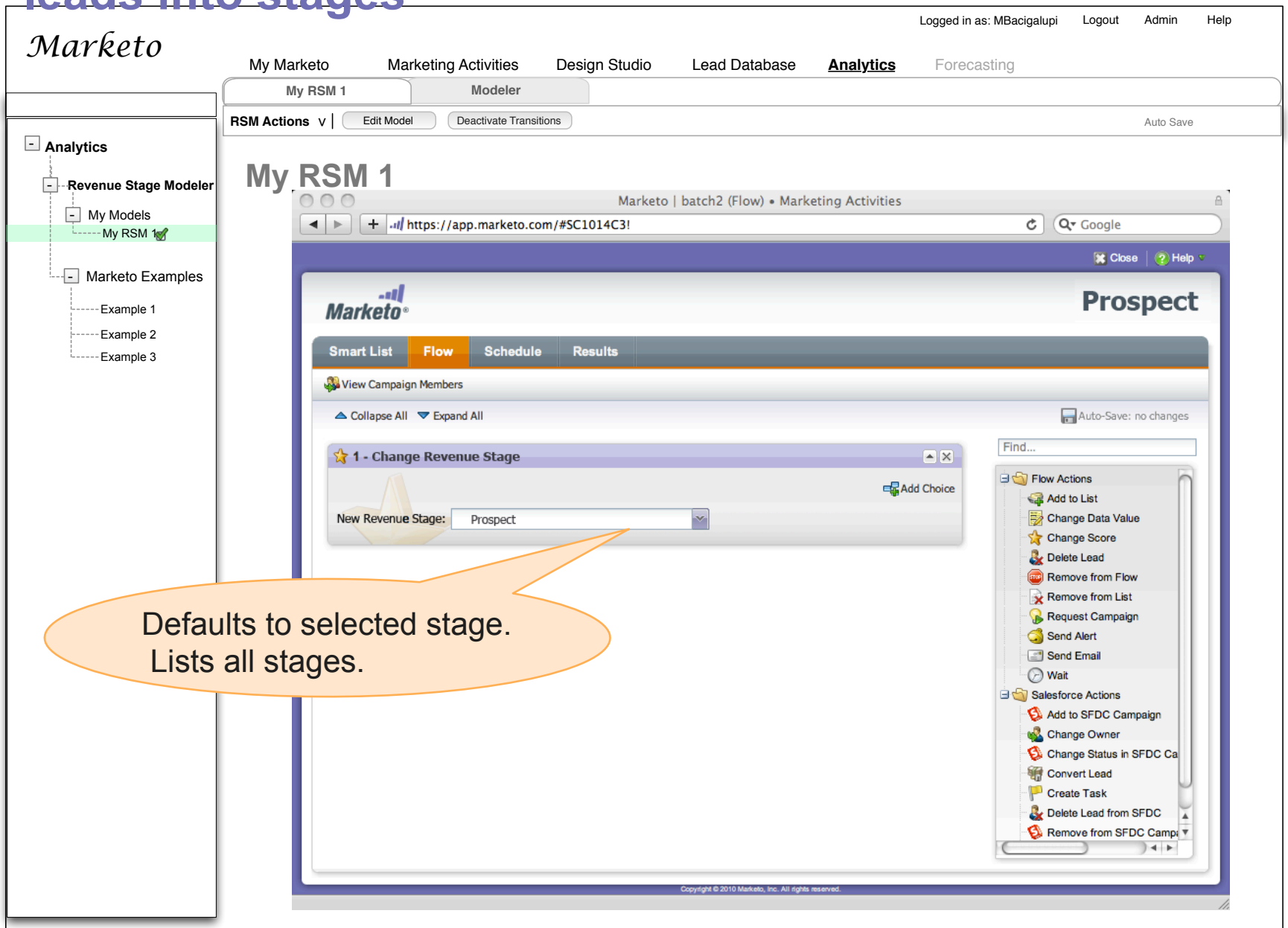

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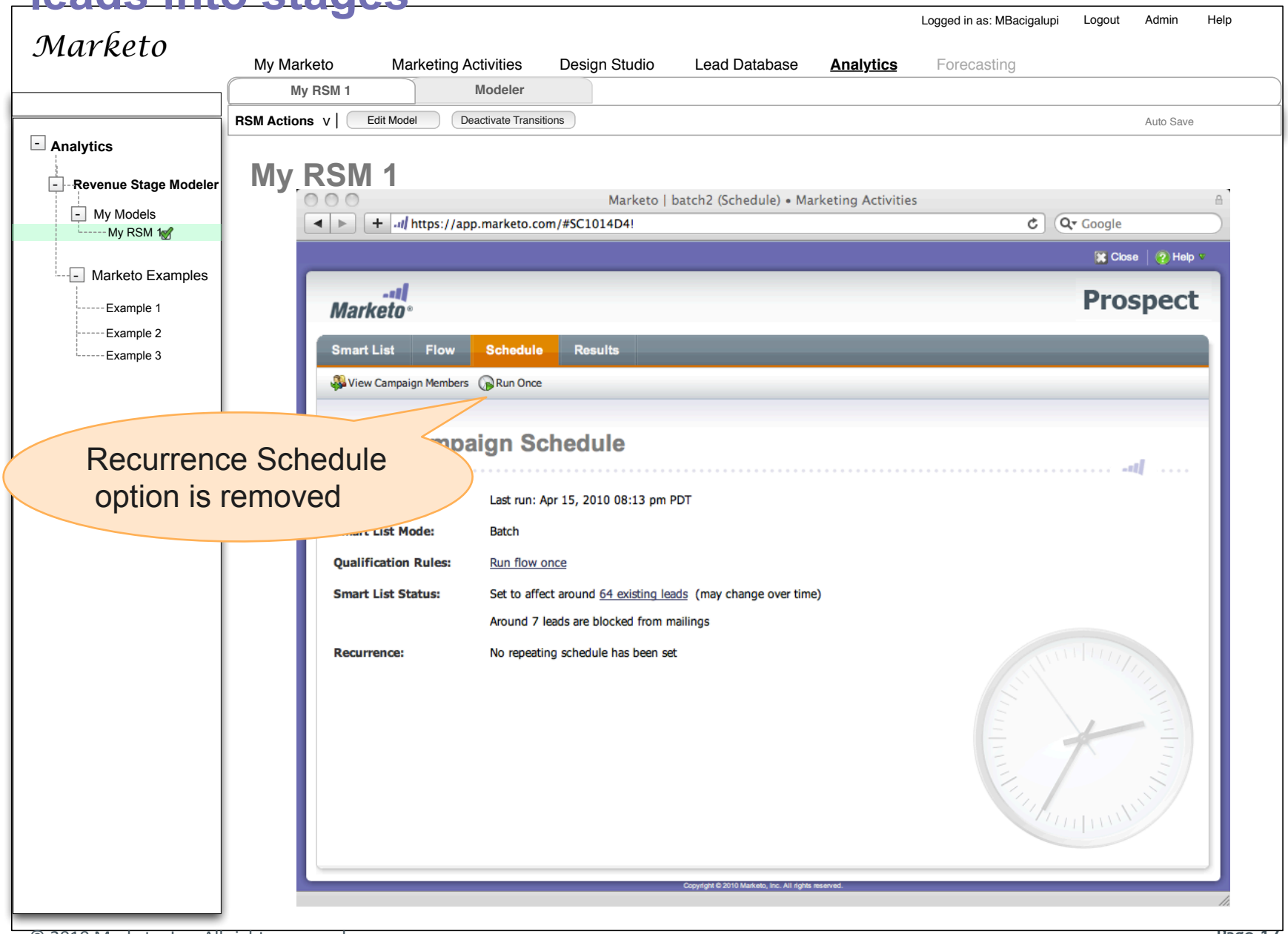

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Campaign UI as the methodology to get leads into stages

Logged in as: MBacigalupi Logout Admin Help

Marketo

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

My RSM 1 | Modeler

RSM Actions | Edit Model | Deactivate Transitions | Auto Save

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

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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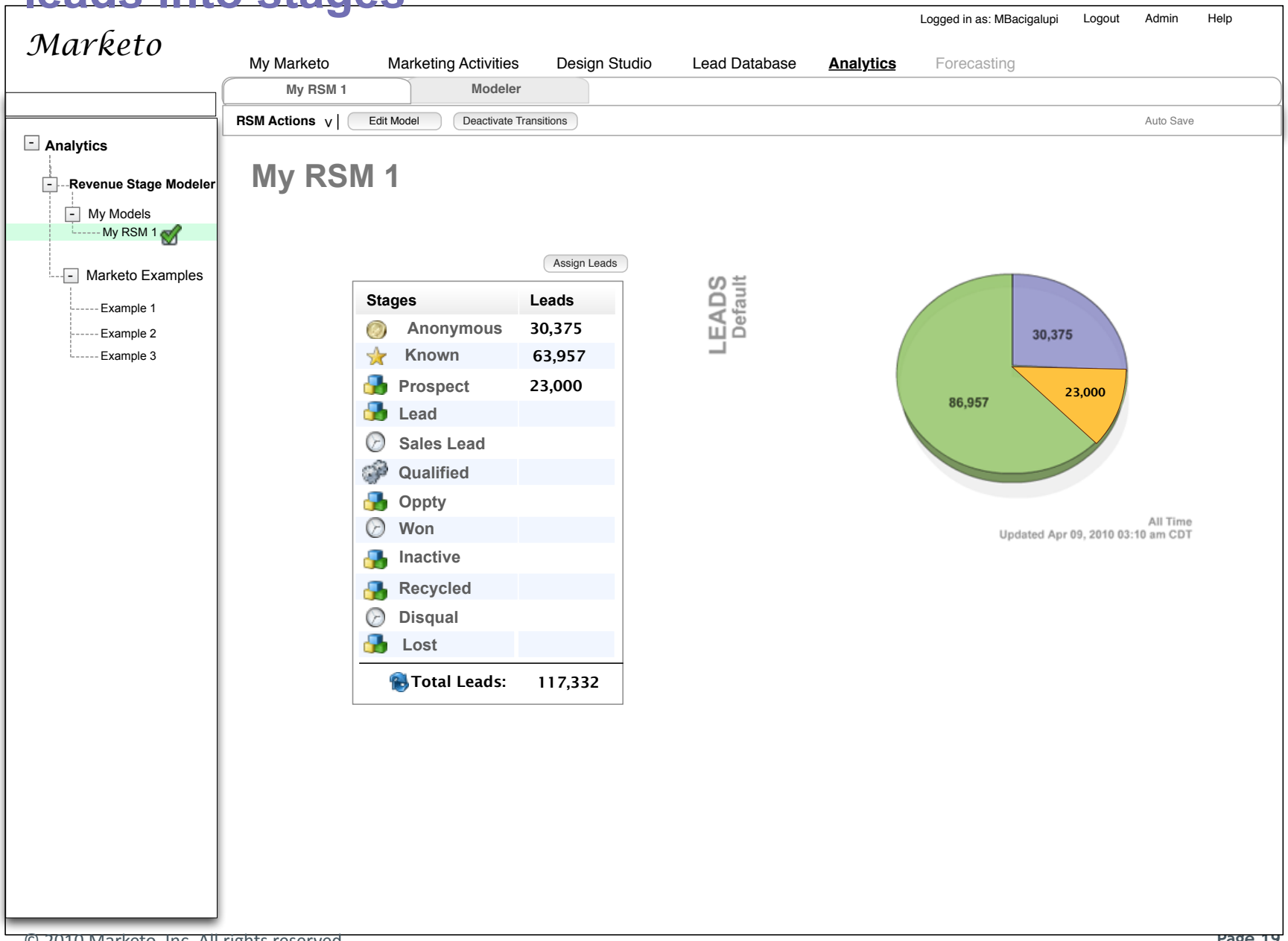
Campaign UI as the methodology to get leads into stages



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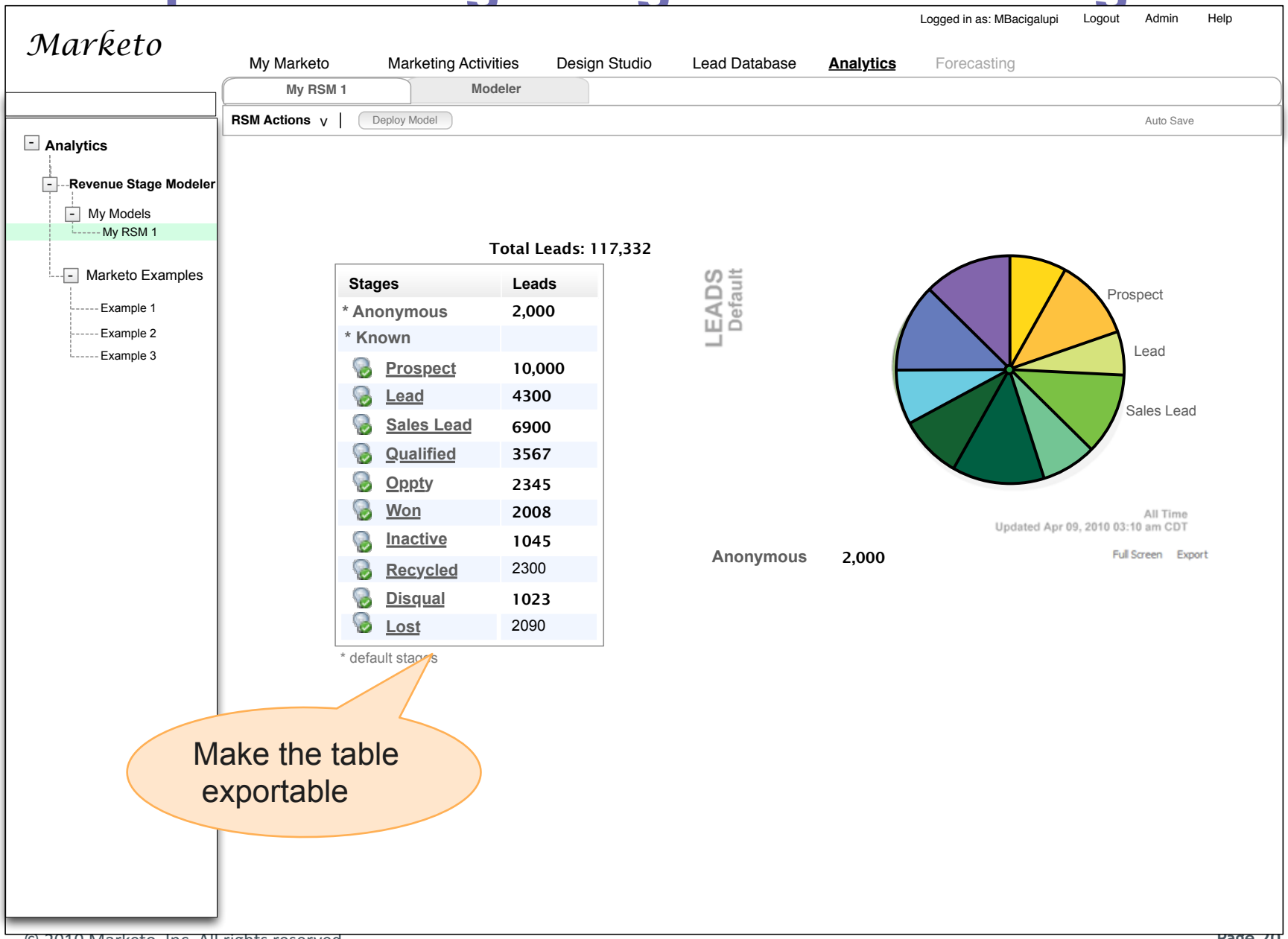
Completion of getting leads into stages



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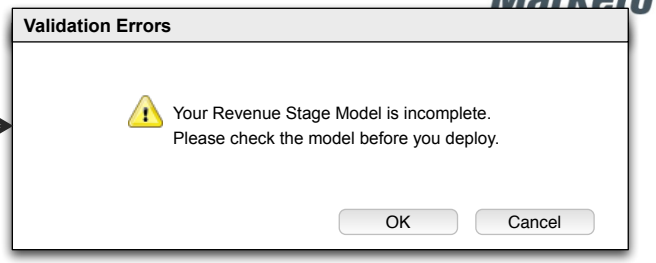
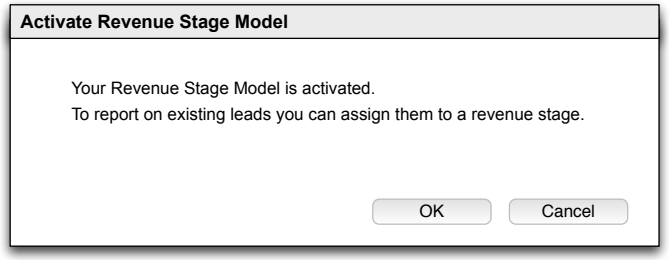
Model States

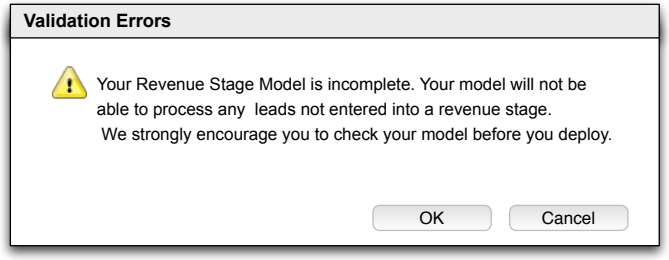
- Not Validated / Existing Leads not Assigned



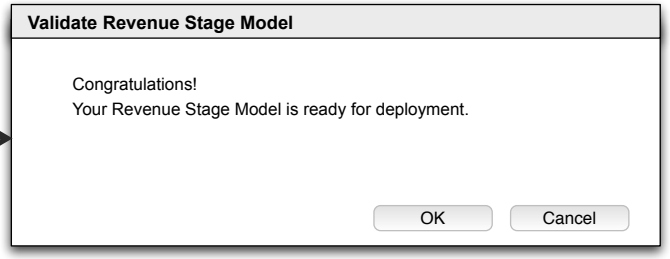
- Activate Model / Existing Leads not Assigned



- Not Validated / Existing Leads Assigned



- Validated / Existing Leads Assigned



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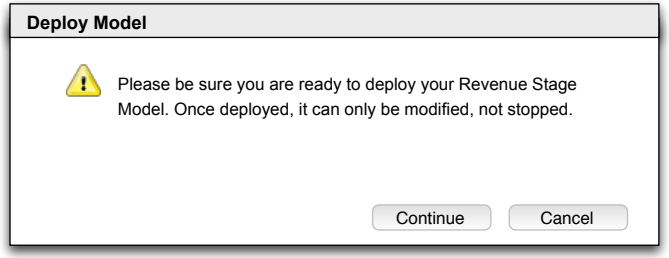
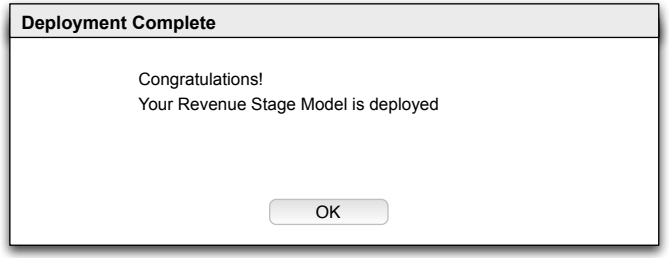
Deployment Behavior

- 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





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