Revenue Stage Modeler - First Experience

Marketo

My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

Revenue Stage Model

New Stage   New Transition | Select RSM Model ⌄   Preview Report   Auto Save

....
Revenue Stage Model

Revenue Stage Model   View Paths   [ON | OFF]   [Deploy Model]

To build your Revenue Stage Model select a model provided or click and drag the stage icon to the canvass.

Start   Any stages that represent your Happy Path flow go above the line.   End

⌄ Hide Detours (4)

Any stages that you consider detours can be put below the line.

"Stage Name"   **Destination Stage Out Of "Stage Name"**

Name [_____]   Type [___ ⌄]   [ ] [___ ⌄]

Description [_____]

Copyright...

Revenue Stage Modeler - with details for a Smart Transition opened

The first time a stage created the canvass a draft is auto-created.

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Revenue Stage Model

New Stage   New Transition   Select RSM Model ⌄   Preview Report   Auto Save

Revenue Stage Model - Draft   View Paths ON | OFF   [Deploy Model]

....
Revenue Stage Model
   Draft 02-07-10

Un-named

⋁ Hide Detours (2)

"Stage Name"

Name [Anonymous]   Type [⌄] [ ] [⌄]

Description [   ]

Destination Stage Out Of "Stage Name"

Name
[⌄]

Copyright...

Revenue Stage Modeler - with details for a Smart Transition opened

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Logout   **Admin**   Help

Logged in as: MBacigalupi

My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

Revenue Stage Model

New Stage   New Transition   Select RSM Model   Preview Report   Auto Save

Revenue Stage Model - Draft   View Paths [ON] [OFF]   [Deploy Model]

Anonymous

∨ Hide Detours (2)

Inactive   Disqual

Anonymous

Name [Anonymous]   Type [▾] [ ] [▾]   **Destination Stage Out Of "Stage Name"**

Name
Inactive ▾
Disqual ▾

[Add Another]

Description [   ]

Copyright...

Revenue Stage Modeler - with details for a Smart Transition opened

User can select a Smart Transition to view details and it opens in tabs. Only one can be opened at a give time.

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My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

| **Revenue Stage Model** | **Transition : Inactive** | **Results** |

New Stage   New Transition   Select RSM Model ⌄   Preview Report   Auto Save

Revenue Stage Model - Draft

View Paths ON **OFF**   Deploy Model

Anonymous   Pending   Review

∨ Hide Detours (4)

Inactive   Disqual   Recycle

Anonymous

Name [Anonymous]   Type [____ ⌄] [__] [____ ⌄]   **Destination Stage Out Of "Stage Name"** Add Another

Name

Description [_____]   [Inactive ⌄]
[Disqual ⌄]
[Recycle ⌄]

Copyright...

Revenue Stage Modeler - New Stage
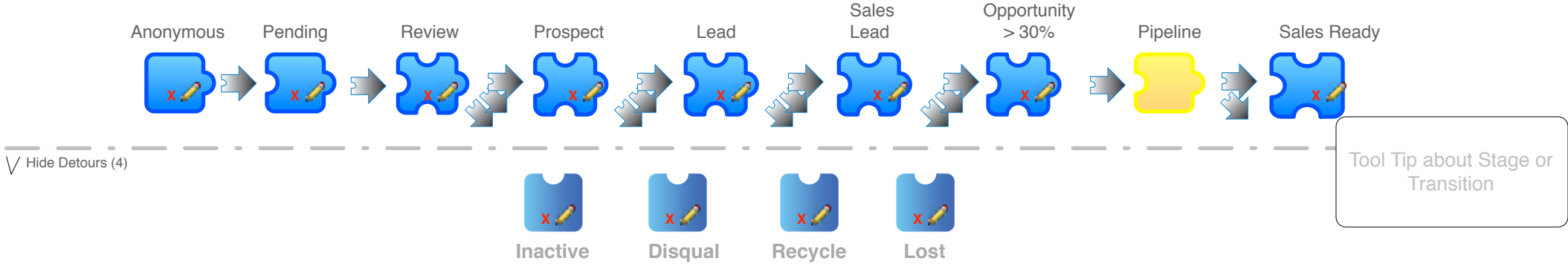
Marketo

My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

Revenue Stage Model	**Transition : Pipeline**	**Results**

New Stage   New Transition   Select RSM Model ∨   Preview Report   Auto Save

Revenue Stage Model - Draft

View Paths   ON   OFF   Deploy Model

Anonymous   Pending   Review   Prospect   Lead   Sales Lead   Opportunity > 30%   Pipeline   Sales Ready

Tool Tip about Stage or Transition

∨ Hide Detours (4)

Inactive   Disqual   Recycle   Lost

Pipeline

Name   Pipeline   Type   [▾]   [ ]   [▾]

Destination Stage Out Of "Stage Name"   Add Another

Name

[Lost ▾]

Description [ ]

Copyright...

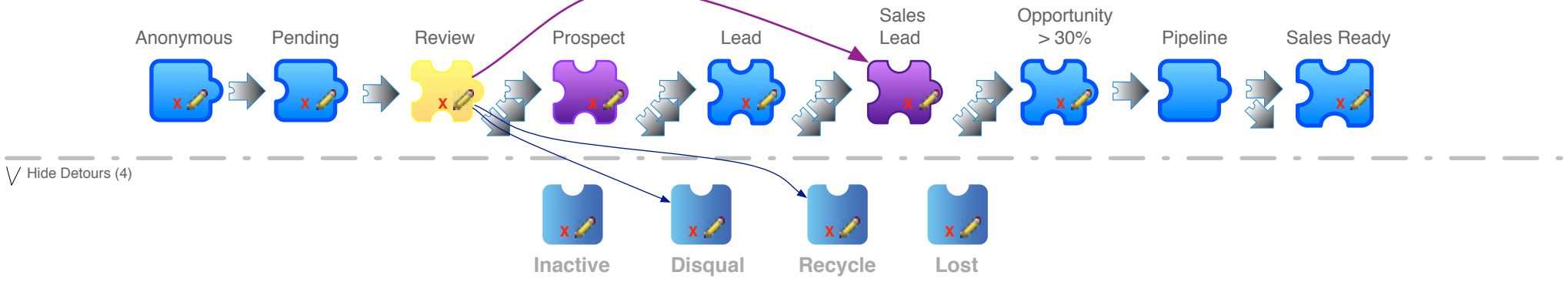# Marketo

My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

| Revenue Stage Model | **Transition : Recycle** | Results |

🧩 New Stage   ➡ New Transition | ▭▭ Select RSM Model ⌄   ⚙ Preview Report   Auto Save

Revenue Stage Model - Draft   View Paths | ON | OFF | [Deploy Model]

....
**Revenue Stage
Model**
   Draft 02-07-10

Anonymous   Pending   Review   Prospect   Lead   Sales Lead   Opportunity > 30%   Pipeline   Sales Ready

⌵ Hide Detours (4)

Inactive   Disqual   Recycle   Lost

🧩 **Anonymous**

Name [Review]   Type [____▾] [__] [____▾]

Description [   ]

Destination Stage Out Of "Stage Name"

Name

[Disqual   ▾] ✏
[Recycle   ▾] ✏

[Add Another]

Copyright...

Revenue Stage Modeler

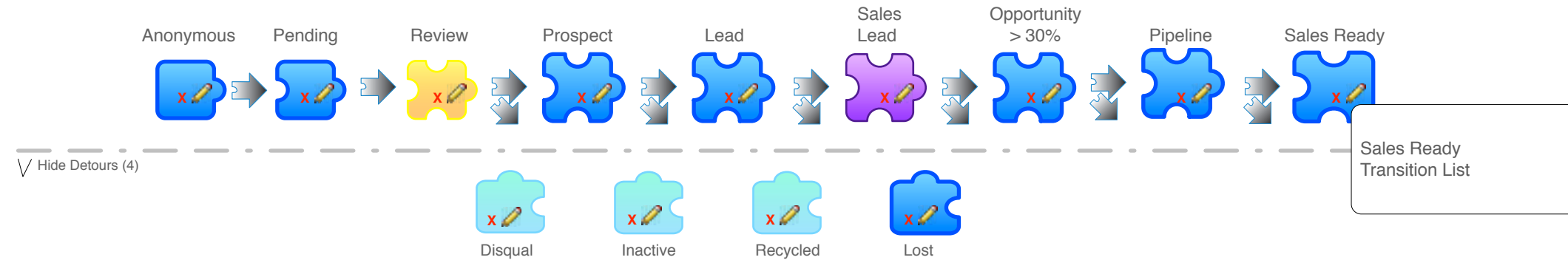## Marketo

My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

Revenue Stage Model

New Stage | New Transition | Select RSM Model ⌄ | Preview Report | Auto Save

Revenue Stage Model - Draft

View Paths [ON | OFF]   [Deploy Model]

Anonymous   Pending   Review   Prospect   Lead   Sales Lead   Opportunity > 30%   Pipeline   Sales Ready

Sales Ready Transition List

⋁ Hide Detours (4)

Disqual   Inactive   Recycled   Lost

Review Stage Details

Name [Review]   Type [SLA ▾]   [1] [Days ▾]   Description [   ]

Transitions out of Review

Name	Smart Transition ▾	Value	
Prospect (Primary)	Revenue Stage Change	Revenue > 1M	
Revenue Assessment	Revenue Stage Change	Revenue < 1M	

Copyright...

Revenue Stage Modeler

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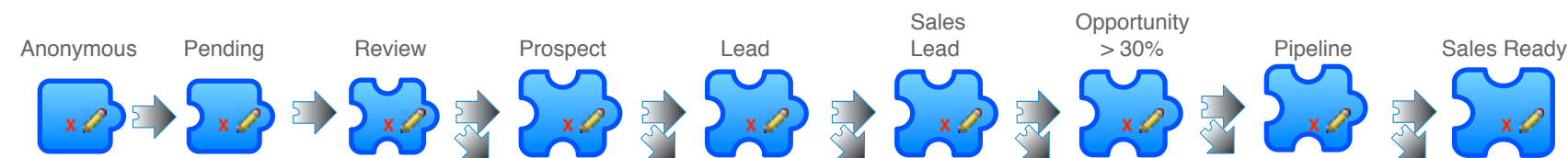My Marketo   Marketing Activities   Design Studio   Lead Database   Analytics   Forecasting

Revenue Stage Model

🧩 New Stage   ➡ New Transition   ▭▭▭ Use Template   ⚙ Preview Report   Auto Save

Revenue Stage Model - Draft

View Paths [ON | **OFF**]   [Deploy Model]

Anonymous   Pending   Review   Prospect   Lead   Sales Lead   Opportunity > 30%   Pipeline   Sales Ready

▽ Hide Detours (4)

Disqual   Inactive   Recycled   Lost

🧩 **Review Stage Details**

Name [Review]   Type [SLA ▾]   [1] [Days ▾]   Description [   ]

Transitions Into Review

Name	Smart Transition ▾	Value	
Pending (Primary)	Score has changed		📝
Inactive			📝
Disqual			📝

Transitions out of Review

Name	Smart Transition ▾	Value	
Prospect (Primary)	Revenue Stage Change	Revenue > 1M	📝
Revenue Assessment			
Revenue Assessment	Revenue Stage Change	Revenue < 1M	📝

Behavior - can click and drag stages and transitions onto the canvas and 'hook' them together

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RSM Behavior

- Only one pipeline deployed at a given time

- Only one working draft at a given time

- Once a draft is deployed the currently deployed RSM is versioned

- Is there a naming is it defaulted

- Button would say "Redeploy Model"

- User can edit Smart Transition by selecting one tabs open up within the same window

- Consider providing a simple template (based on what we know so far) that users can then modify and make their own

- Preview Report allows users to see the basic report structure their data will appear in given the working model

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Revenue Stage Model
Draft 02-07-10