



## Revenue Stage Modeler

Contact: MB  
Proposals: 02/02/10

# Design Assumptions

1. **Beginning Stages Seeded**
2. The create mode will be a draft form and will be captured as a tree object
3. After deployment it will be captured as the working pipeline model
4. Ability to modify and archive version as a tree object in read only format
  1. Need date/time stamp beginning and end to show use.
  2. Related to reports
5. Use of Smart Lists with reduction of UI
  1. Smart List and Results

## Interaction Model (incomplete)

1. Both create stage and transitions are pop ups
2. Delete / modify will 'highlight' on rollover
3. Enable drag and drop to create / move both stages and transitions
4. Ability to view (turn on) transition paths from a given –or all?- stages to relevant stages

# Future Considerations Not necessarily for .05

1. Need permissions
2. Need workflow ability
  1. Need to be able to 'Approve' model draft
    1. Scenario – Kelly sets up the model as he understands it but needs Jon to approve

# For All designs

1. Location – Admin section
2. Can create multiple stages
3. Can create multiple transitions
4. Can move and assign the to and from

# Option 1

## Pipeline Background

Marketo

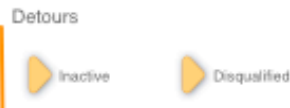
My Marketo Marketing Activities Design Studio Lead Database Analytics Forecasting

New Stage New Transition

### Revenue Stage Model - DRAFT

View Paths  ON  OFF

....  
Revenue Stage Model



# Option 1



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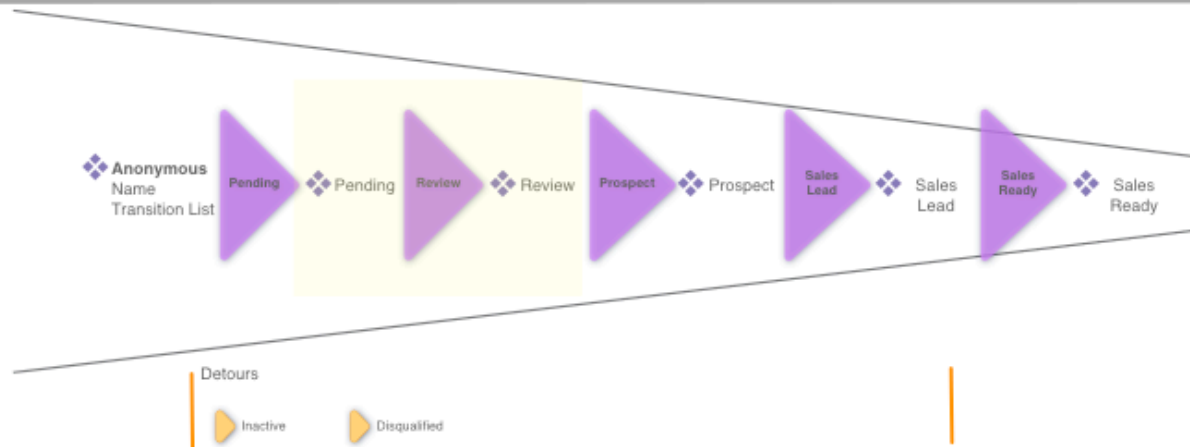
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[New Stage](#) [New Transition](#)

## Revenue Stage Model - DRAFT

View Paths

....  
**Revenue Stage Model**  
 Draft 02-20-10



### Review Stage Details

Name Review Type SLA 1 Day  
 Description  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

### Transitions

Into Review | [Out of Review](#)

Name	No. of people	Length of Time	From Transition/Stage
Foo			

Name	No. of People	Length of Time	From Transition/Stage
2-A	3-A	4-A	5-A
2-B	3-B	4-B	5-B

# Option 2

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Drag and Drop  
new stage create  
dialog appears

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New Stage  New Transition

.....  
**Revenue Stage Model**  
Draft 2-20-10

**Revenue Stage Model - DRAFT** View Paths

Stage 3  
Name: Review Type: SLA 1 Days  
Description:  
OK Cancel

> Show Detours (0)

Question – do we need to and from in stage dialog?  
What if none have been created.



# Option 2

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Drag and Drop  
new transition  
dialog appears

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New Stage  New Transition

### Revenue Stage Model - DRAFT

View Paths

The screenshot shows the Marketo Revenue Stage Model interface. On the left, a sidebar displays 'Revenue Stage Model Draft 2-20-10'. The main workspace shows a workflow diagram with stages: 'Anonymous', 'Pending', 'Review', and 'Disqual'. A 'New Transition' dialog box is open, showing a 'Smart List' tab with the text '(Reuse of smart list builder)'. The dialog includes a search bar, 'Use all Filters', 'Collapse All', and 'Expand All' options, and 'OK' and 'Cancel' buttons at the bottom.

# Option 2

Can show only happy path with details for a given selected stage

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 New Stage  New Transition

....  
**Revenue Stage Model**

**Revenue Stage Model** View Paths  ON  OFF

> Show Detours (0)

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**Review Stage Details**

Name **Review** Type **SLA** 1 Day

Description  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**Transitions**

Into Review | [Out of Review](#)

Name	No. of people	Length of Time	From Transition Stage
Review			

[Out of Review](#)

Name	No. of people	Length of Time	From Transition Stage
Prospect			

Question – Would users ever need to show multiple details at a given time.

# Option 2

Can 'turn' on the transition paths from a selected stage. Ability to hide/show 'Detour' stages.

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....  
**Revenue Stage Model**

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Logout **Admin** Help  
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Revenue Stage Model View Paths  ON  OFF Deploy Model

Hide Detours (4)

**Review Stage Details**

Name Review Type SLA 1 Day

Description  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**Transitions**

Into Review | [Out of Review](#)

Name	No. of people	Length of Time	From Transition/Stage
Review			

Question – would user need/want the complexity of seeing multiple paths from multiple stages?

[Out of Review](#)

Name	No. of people	Length of Time	From Transition/Stage
Prospect			

# Option 3

## Circular format emphasizing non-linear process

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My Marketo Marketing Activities Design Studio Lead Database Analytics Forecasting  
 New Stage  New Transition

....  
**Revenue Stage Model**

View Paths
 ON  OFF

### Revenue Stage Model

**Review Stage Details**

Name Review    Type SLA    1 Day

Description  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**Transitions**

Into Review | [Out of Review](#)

Name	No. of people	Length of Time	From Transition/Stage
Review			

> Show Detours (0)

Issue – may be a challenge to implement drag and drop. Would need to consider other ways to create stages and transitions.

# Considerations

1. Need to consider:
  1. Ability see summary information
  2. Ability to see details
  3. Ability to manipulate 'objects' freely
  4. Ability to manipulated how complicated the visual becomes
  5. Caution against too much complexity
    1. Difficult to know without other examples
  6. Impact and need for screen real estate