Who: Sarah, CMO

Sarah is the CMO of a large revenue company, and reports to the CEO.

Goals, motivations, concerns

- She's struggled to build credibility with the head of Sales, and the CFO is always critical of marketing spending. Other stakeholders are naïve about the reality of how pipeline works, e.g. non-linearity, time dimensions, etc. Sarah recognizes that it is important to bridge the gap between the naiveté and the reality. She is very motivated to make the numbers very explainable and easily understandable. Ie Strives to make it simple to get to help others get "what this means is.…" even though it's not that simple. She is motivated to show results to the board as her because her bonus is tied to meeting or exceeding the number of "opportunities" created.

What: Knowledge, skills and abilities

Sarah is comfortable using Excel and is good at seeing business trends in the data, but she's more likely to ask Mary to customize a report for her than to drill into something. She also values the fact that there is a dashboard where she can see all the data herself

How: Weekly critical task

- Sarah is comfortable uses Excel
- Actively looks at business trends in the data,
- Likely to ask Mary to customize a report for her than to drill into something.
- Keeps the dashboard where she can see all the data herself
- Once a quarter, Sarah presents Marketing results to the board.
- Is very keen to get her hands on the Forecasting and Budgeting component of RCA since right now she has to do this manually.

When: Weekly / Daily use of the Revenue Cycle Explorer

- Frequently / daily views into RCE
- Adjusts dials and timeframes
- Saves different time/date snapshots since she'll need them when she builds her board reports
- Wants to easily create presentation directly from Explorer

Who: Mary Marketer (Manager)

Mary is 30 years old, she feels overworked and underpaid . She's creative, and can handle basic Excel spreadsheets and Google Analytics as well. Meets weekly with her manager to report progress.

Goals, motivations, concerns

She is fairly dedicated to her job, cares about the quality of her programs, and wants to have a positive impact on the company. She cares about accuracy and how the information can show ROI and guide good decision making on where to invest her dollars.

What: Knowledge, skills and abilities

One of her primary job responsibilities is to analyze the health of the revenue cycle. She uses SFDC reports and dashboards, but very rarely sets them up. Provide her boss with a weekly report tracking key performance indicators about the flow of leads through the pipeline. She uses this to help make sure they are on track to meet the company's monthly and quarterly targets. Mary has worked out the data model that she knows is needed in reporting. She has communicated this to Mike, who is tasked with implementing per her instructions.

How: Weekly critical task

- Manually pulls Smart Lists from Marketo
- Manually pulls various reports in SFDC
- Enters all of this into an Excel Spreadsheet

When: Weekly / Daily use of the Revenue Cycle Explorer

- View and save reports and charts (defined in the RCM)
    - She controls the time frame (by quarter, by week)
    - She controls the graph style
    - She controls what parts of the information to surface
- She is able to select the different charts into a single dashboard view
    - This allows her to quickly answer Sarah's (the CMO) questions with exact information quickly
    - She can also drill down into details quickly as needed
- This information is shared as read only with other members of her time who have access to RCA (permissions)

Who: Mike – Marketing Coordinator

Mike, 27 years old, is a marketing coordinator who reports to Mary. Mike is not particularly analytical.

Goals, motivations, concerns

He thinks highly of the information he provides that helps Mary decide where to invest more and where to cut back and determine which campaign activities work well.

What: Knowledge, skills and abilities

Mike is technically proficient and understands Marketo well. He creates batch campaigns, emails, and landing pages on a daily basis. One of Mike's primary responsibilities is to review lead generation Programs. Mike is the one that, per Mary's instructions, build the data model for analytics in the RCM. He has gone in to refine it a few times since implementation. Again, per Mary's instructions.

How: Weekly critical tasks

- Mary wants Mike to assess the success of his Lead Generation programs on a weekly basis.
  - Measured by new leads generated
  - Conversion of existing leads through the revenue cycle.
- Mike also creates monthly roll-up reports for Mary to share with the CMO
  - The roll ups show 3 month average cost per new "prospect" and cost per new "opportunity"
  - It highlights the top 5 lead generation programs.

When: Weekly / Daily use of the Revenue Cycle Explorer

- Mike is logged into Marketo's Revenue Analytics Explorer all day
- He uses it to review reports and charts primarily in the Lead Generation dashboard
- He also views the reports he has saved