

# Non-deployed model

Will need Clone Model in the future to support multiple RSMs.

Moveable tool palette of stages.  
Need icon states for incomplete/in process for stages.

## Build A 5 Stage Model

1. Prospect
2. Lead
3. Sales Ready
4. Opportunity
5. Inactive
6. Recycle
7. Lost

The screenshot shows the Marketo Revenue Stage Model (RSM) configuration interface. At the top, the user is logged in as MBacigalupi. The navigation menu includes My Marketo, Marketing Activities, Design Studio, Lead Database, Analytics, and Forecasting. The main area is titled 'Revenue Stage Model' and contains a toolbar with 'New Stage', 'New Transition', 'Stage Actions', 'View Paths', 'ON/OFF' toggle, and 'Deploy Model' buttons. A 'New Revenue Stage Model' modal is open, showing fields for 'Name' and 'Description', and a 'Create' button. A 'Linked Stages' section is visible at the bottom, showing a 'Stage Name' configuration panel with fields for Name, Type, and Description, and a 'Stage Transitions' panel with a 'Define Transition' button. Annotations include a yellow box on the left about auto-save and draft icons, a yellow box on the right about RSM options, and a grey box in the 'Linked Stages' section for meta data options.

The MLM model for auto-save with be used for creating a RSM that is not deployed. Icons to indicate draft and deployed will be used. Are there limits to the number of drafts?z

\* RSM lives in Analytics  
\* RSM Homepage has options for:  
Do it Yourself - use this if...  
Basic - use this if...  
Advanced - use this if...  
(HmPg not shown)  
  
\* New is selected standard pop up for creating a new object comes up

Other meta data options here.

Other meta data options here.

Other meta data options here.

Stage Transitions

No Transitions Defined Define Transition

Destination Stage	Active
	<input type="checkbox"/>

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

Revenue Stage Model

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

Happy Path

Hide Detours (2)

Linked Stages Recycle to Prospect

**Stage "Name"**

Name

Type

Description

Other meta data options here.

**Stage Transitions**

No Transitions Defined Define Transition

Destination Stage	Active
	<input type="checkbox"/>

# Non-deployed model

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Revenue Stage Model

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

Prospect (0)

Happy Path

Hide Detours

Linked Stages

Stage: Prospect

Name Prospect

Type Inventory Month

Description

Other meta data options here.

Other meta data options here.

Other meta data options here.

Stage Transitions

No Transitions Defined Define Transition

Destination Stage	Active
	<input type="checkbox"/>

## Add Stage to Canvas

### GRID BEHAVIOR

- \* User clicks and drags a stage onto the canvas (icon is 43 x 48 pixels)
- \* When stage is within a 40 x 40 pixels the grid square lights up and indicates the hot spot for 'dropping' the stage
- \* The flashing cursor is placed in the name field in the detail form
- \* The stage is placed vertically and horizontally centered in the square
- \* Labels for stages are in the square above, left aligned to the inside edge, 2 (?) pixels above the bottom edge
- \* If there are too many stages / transitions to fit horizontally or vertically on the canvas there will be scroll bars above the detail pane and to the right and under the menu/ tool bar

### HAPPY PATH BEHAVIOR

- \* After a stage is placed in a square any square to the left, right, or below can only contain transition arrows
- \* A stage cannot be added above the Happy Path
- \* Two stages or transitions cannot be placed in the same square

### DETOUR BEHAVIOR

- \* Detours can be up to 3 levels down.
- \* Same rule as above applies so that a stage cannot be directly adjacent to another stage

# Build out the stages

### Revenue Stage Model

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

....  
Revenue Stage Model  
> RSMFoo 02-25-10



Hide Detours

*\* As subsequent stage is inserted - an undefined transition is created  
\* It 'attaches' to the inside centered 'from' side of the grid square in-between the two stages  
\* Only happy path transition arrows show by default*

### Linked Stages

#### Stage: Lead

Name   
Type  30 Days

Description

Other meta data options here.

Other meta data options here.

#### Stage Transitions

No Transitions Defined

Destination Stage	Active
	<input type="checkbox"/>

# Build out the stages

### Revenue Stage Model

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

....  
Revenue Stage Model  
> RSMFoo 02-25-10



\* Transition arrow is selected and grid square highlights  
\* Pop up window appears  
\* Tabs for Smart Lists and Results opens and user is navigated to the

#### Smart List Transition

Transition To:

Description:

Create Cancel

### Linked Stages

#### Stage: Lead

Name

Type  Days

Description

Other meta data options here.

#### Stage Transitions

No Transitions Defined

Destination Stage	Active
	<input type="checkbox"/>

Other meta data options here.

Smart List Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All Auto-Save: Feb 25, 03:37pm

**Score is Changed**

Score Name:  Lead Score

New Score:

Add Constraint

sc

- Triggers
  - Email
    - Unsubscribes from Email
    - Score is Changed
- Filters
  - Lead History
    - Email
      - Unsubscribed from Email
      - Score was Changed
  - Lead Attributes
    - Behavioral Score
    - budget score
    - budgetauth score
    - custscore
    - Demographic Score

Smart List Results

New Campaign Actions View Campaign Members

Filter: None

ID	Date/Time (PST)	Activity Type	Detail	Lead Name	Company
<a href="#">8469102</a>	Feb 20, 2010 04:41 pm	Email Delivered	Nur Second Chance	<a href="#">Kaveh Azari</a>	Aricent
<a href="#">8469100</a>	Feb 20, 2010 04:41 pm	Send Email	Nur Second Chance	<a href="#">Kaveh Azari</a>	Aricent
<a href="#">8467787</a>	Feb 20, 2010 12:16 pm	Click Email	Nur Second Chance	<a href="#">Steve Nesich</a>	MarketStrike
<a href="#">8467775</a>	Feb 20, 2010 12:16 pm	Visit Webpage	best-practices-opt-in	<a href="#">Steve Nesich</a>	MarketStrike
<a href="#">8461406</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Kurt Johnson</a>	Heartland Payment Systems
<a href="#">8461405</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Timothy Titus</a>	Titus-Leavitt Insurance & Fi
<a href="#">8461399</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Lisa Coyle</a>	Heartland Payment Systems
<a href="#">8461398</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Suzanne Yu</a>	Heartland Payment Systems
<a href="#">8461393</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">John M. Kamp</a>	The Business Kamp
<a href="#">8461392</a>	Feb 19, 2010 03:13 pm	Add to List	Skipped: Skipped execution due to no action specified for this flow step	<a href="#">Sameer Patel</a>	ZapTXT
<a href="#">8461391</a>	Feb 19, 2010 03:13 pm	Add to List	Skipped: Skipped execution due to no action specified for this flow step	<a href="#">Eric Stuhldreher</a>	Britt Bloch Consultants
<a href="#">8461390</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Andrew S. Lennon</a>	Red Anchor Media
<a href="#">8461389</a>	Feb 19, 2010 03:13 pm	Add to List	Nurturing Unsubscribed	<a href="#">Katherine Richert</a>	Affinity Labs
<a href="#">8461325</a>	Feb 19, 2010 03:08 pm	Add to List	Nurturing Unsubscribed	<a href="#">Steve Nesich</a>	MarketStrike
<a href="#">8461322</a>	Feb 19, 2010 03:08 pm	Add to List	Nurturing Unsubscribed	<a href="#">Jason Solinger</a>	Ariba
<a href="#">8461319</a>	Feb 19, 2010 03:08 pm	Add to List	Nurturing Unsubscribed	<a href="#">Peter J. Prior</a>	Hoover's, Inc.
<a href="#">8456087</a>	Feb 19, 2010 11:33 am	Click Email	Nur Second Chance	<a href="#">David Bullock</a>	ITD/HDlogix Inc
<a href="#">8456076</a>	Feb 19, 2010 11:33 am	Visit Webpage	best-practices-opt-in	<a href="#">David Bullock</a>	ITD/HDlogix Inc

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Revenue Stage Model Smart List Results

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

.....  
Revenue Stage Model  
> RSMFoo 02-25-10

Happy Path

Prospect (1) → Lead (1) → Sales Lead (0)

Hide Detours

Linked Stages Recycle to Prospect

**Stage: Sales Lead**  
Name: Sales Lead  
Type: SLA 7 Days  
Description:

Other meta data options here.

**Stage Transitions**  
No Transitions Defined Define Transition

Destination Stage	Active
	<input type="checkbox"/>

**Build a 5 Stage RSM - Step 2**

2. After placing the stage on the canvas the user enters the stage name and other information. The name appears in the info. title and above the stage on the canvas.

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Revenue Stage Model Smart List Results

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

Revenue Stage Model  
> RSMFoo 02-25-10

Happy Path

Prospect (1) → Lead (1) → Sales Lead. (1) → Opps.

Inactive (3)

Hide Detours

Linked Stages Recycle to Prospect

**Stage: Inactive**  
Name: Opps.  
Type: SLA 7 Days  
Description:

Other meta data options here.

**Stage Transitions**  
No Transitions Defined Define Transition

Destination Stage	Active
<input type="text"/>	<input type="checkbox"/>

**Build a 5 Stage RSM - Step 2**

2. After placing the stage on the canvas the user enters the stage name and other information. The name appears in the info. title and above the stage on the canvas.



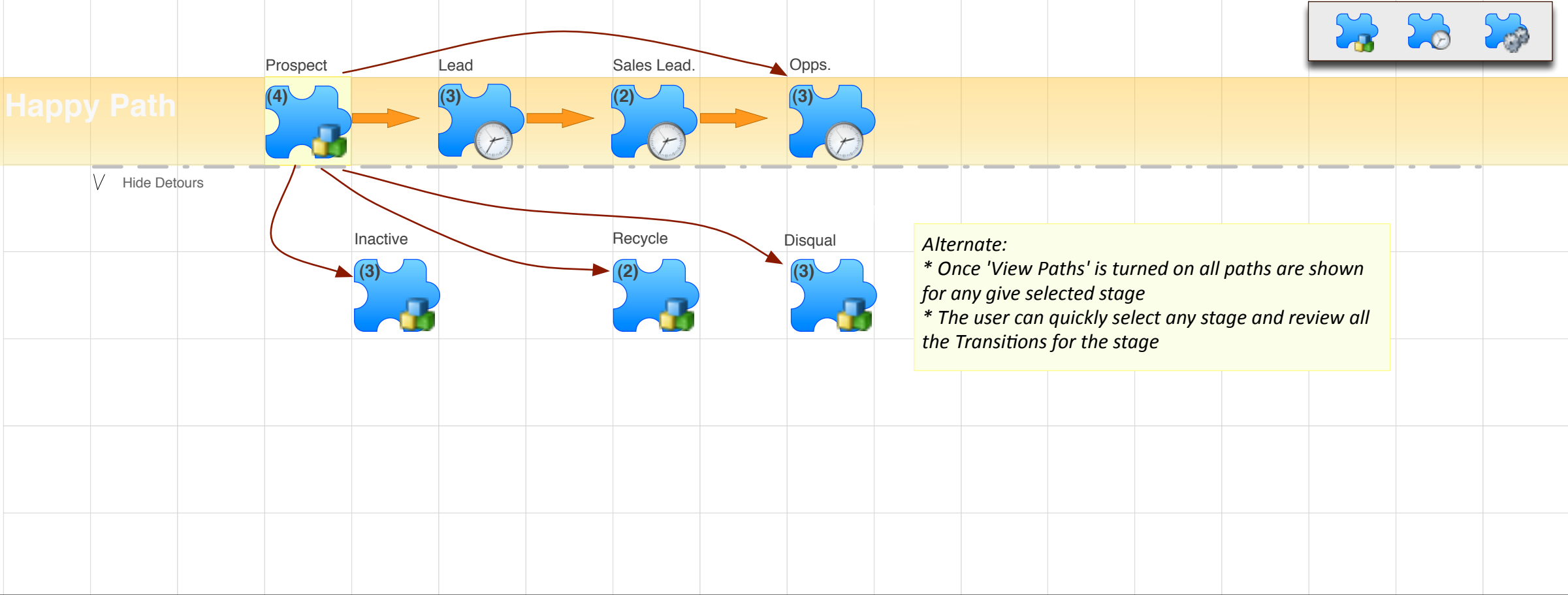
Non-deployed model

Marketo

Revenue Stage Model Smart List Results

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

..... Revenue Stage Model - 2-24-10



**Linked Stages** Recycle to Prospect

**Stage: Inactive**

Name: Prospect.

Type: Inventory  Month

Description:

**Other meta data options here.**

**Stage Transitions**

Define Transition

Destination Stage	Active
Lead	<input type="checkbox"/>

**Other meta data options here.**

Non-deployed model

Logged in as: MBacigalupi Logout Admin Help

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

Revenue Stage Model Smart List Results

New Stage New Transition Stage Actions View Paths ON OFF Deploy Model Auto Save

Revenue Stage Model  
 > RSMFoo 02-25-10

Happy Path

Prospect (4) → Lead (3) → Sales Lead. (2) → Opps. (3)

Inactive (3) Recycle (2) Disqual (3)

Alternative - only show Happy Path and show #s of transitions 'to' from each and additional paths show only on 'On' View Paths.

Hide Detours

Linked Stages Recycle to Prospect

Stage: Inactive  
 Name: Prospect.  
 Type: Inventory Month  
 Description: [ ]

Other meta data options here.

Other meta data options here.

Stage Transitions

Destination Stage	Active
Lead	<input type="checkbox"/>

Do we need to indicate Active / Inactive for the transition icon?

What are the angles allowed for the transition arrows? Is an approximate of angle sufficient? Do we really need curved lines?

Can we only show Happy Path Transitions until 'View Paths' is turned on.

Can we go back to a stage that a lead went into "Detour" from?

When a Stage is selected, the Smart List and Results tab open up to the first (primary) transition.