



## Released Version of the Revenue Cycle Modeler

07-21-10

# Sampling of RCM Release

- ▶ Goal: create a new revenue cycle model
  - Add multiple stages to a new model
  - View stage properties
  - Change stage type
  - Create stage to stage transitions

# Analytics Overview Page

Logged in as: RSM Tester | Logout | Admin | Help

Marketing Activities | Design Studio | Lead Database | **Analytics**

Analytics

Full Access

**Analytics**

**Reports**

- Track lead performance
- Measure campaign results
- View web activity

New Report

**Subscriptions**

- Send reports via email
- Manage distribution of reports

Manage Subscriptions

**TOP LEAD SOURCES**

Lead Source	Count (Approximate)
Web	8
Purchased List	7
Public Relations	5
Partner Referral	4
Phone Inquiry	3
xxx	2
Other	10

Last 30 Days (Apr 28, 2010 - May 27, 2010 PDT)  
Updated May 27, 2010 04:42 pm PDT

Full Screen | Export

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New folder in tree. Same Overview page

# Create a new model



The screenshot shows the Marketo Analytics interface for a '55 MPH Zone'. A 'New Revenue Cycle Model' dialog box is open in the foreground. The dialog has a title bar 'New Revenue Cycle Model' and contains the following fields:

- Name:** \* Test 2
- Description:** (empty text area)

At the bottom of the dialog are two buttons: '+ Create' and '✕ Cancel'. An orange callout bubble points to the dialog with the text 'New model dialog'. The background interface includes a sidebar with report categories like 'Lead Reports', 'Email Reports', and 'Campaign Reports'. The main content area shows 'Analytics - 55 MPH Zone' and a 'No leads found' message for the last 30 days (Jun 16, 2010 - Jul 15, 2010 PDT). A 'Manage Subscriptions' button is visible below the dialog.

# Created a new model

The screenshot shows the Marketo user interface. At the top right, it says "Logged in as: Marketo Administrator" with links for "Logout", "Admin", and "Help". Below this is a navigation bar with "Activities", "Design Studio", "Lead Database", and "Analytics". A secondary bar contains "Model Actions", "Edit Draft", and "Preview Model".

An orange callout bubble points to the main content area, containing the text "New overview page for model".

The main content area is titled "Test 2" and displays the following information:

- Model Status:** Draft
- Status Time:**
- Stages:** 7
- Known Leads:** 0

Below the text is a placeholder image of a yellow cube with blue straps.

On the left side, there is a sidebar with a tree view of reports and models. The "My Models" folder is expanded, showing "Test 2" selected.

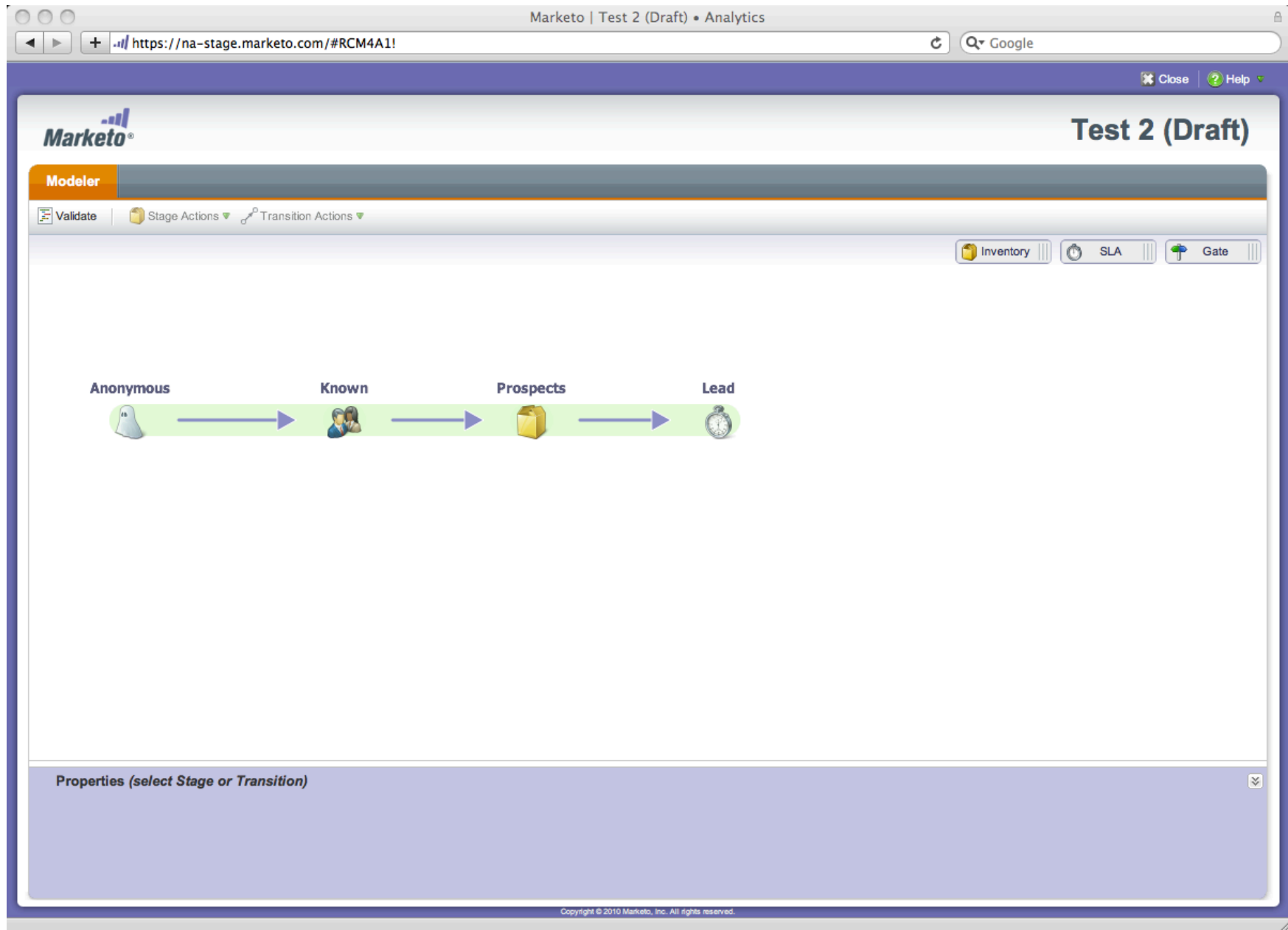
# New model pop up window

The screenshot displays the Marketo Modeler interface. At the top, there is a title bar with 'Close' and 'Help' buttons. Below this is a toolbar with 'Validate', 'Stages', and 'Transition Actions' options. The main workspace shows a workflow diagram with two stages: 'Anonymous' (represented by a person icon) and 'Known' (represented by a group of people icon), connected by a blue arrow. To the right of the workspace is a 'Stage Palette' containing icons for 'Inventory', 'SLA', and 'Gate'. A yellow box icon is highlighted in the palette with a dashed border. Two callout boxes are present: one pointing to the workflow diagram with the text 'Default stages and "Success Path"' and another pointing to the stage palette with the text 'Drag and Drop new stage From the stage palette.' At the bottom of the interface is a 'Properties (select Stage or Transition)' panel.

# New stage selected

The screenshot shows the Marketo Modeler interface. At the top right, there are 'Close' and 'Help' buttons. The main header area contains the Marketo logo and the text 'Test 2 (Draft)'. Below this is a 'Modeler' tab. A navigation bar includes 'Validate', 'Stage Actions', and 'Transition Actions'. On the right side of the workspace, there are three icons: 'Inventory', 'SLA', and 'Gate'. The main workspace displays a flow diagram with 'Anonymous' and 'Known' stages connected by a green arrow, and a 'stage-3' box containing an inventory icon. An orange callout bubble points to the 'stage-3' box with the text 'Properties panel show'. At the bottom, the 'Stage Properties' panel is visible, containing a 'Name' field with 'stage-3', a 'Description' field, a 'Type' dropdown menu set to 'Inventory', and a checkbox for 'Start Tracking by Account'. A large cardboard box icon is also present in the bottom right corner of the properties panel.

# Default Current Analytics Overview Page



The screenshot displays the Marketo Modeller interface for a draft named "Test 2 (Draft)". The browser address bar shows the URL <https://na-stage.marketo.com/#RCM4A1!>. The interface includes a top navigation bar with the Marketo logo and the draft name. Below this is a toolbar with "Validate", "Stage Actions", and "Transition Actions" buttons. On the right side of the toolbar, there are three expandable panels: "Inventory", "SLA", and "Gate". The main workspace features a horizontal flow diagram with four stages: "Anonymous" (ghost icon), "Known" (people icon), "Prospects" (box icon), and "Lead" (clock icon), connected by blue arrows. At the bottom, there is a "Properties (select Stage or Transition)" section. The footer contains the copyright notice: "Copyright © 2010 Marketo, Inc. All rights reserved."



# Model with stages added



The screenshot displays the Marketo Modeler interface for a lead flow model. The top navigation bar includes 'Close' and 'Help' buttons. The main header shows the 'Modeler' tab and the model name 'Test 2 (Draft)'. Below the header, there are toolbars for 'Validate', 'Stage Actions', and 'Transition Actions'. On the right, there are filters for 'Inventory', 'SLA', and 'Gate'. The central canvas shows a lead flow diagram with five stages: 'Anonymous' (ghost icon), 'Known' (people icon), 'Prospects' (box icon), 'Lead' (clock icon), and 'Opty' (box with document icon). A blue arrow points from the 'Prospects' stage to an 'Inactive' stage (box icon). An orange callout bubble points to the 'Opty' stage, containing the text: 'Real time change of stage Type on the canvas'. At the bottom, the 'Stage Properties' panel is visible, showing the 'Name' field with 'Qoty', a 'Description' field, and a 'Type' dropdown menu set to 'Inventory'. A checkbox for 'Start Tracking by Account' is checked. A box icon is shown in the bottom right corner of the panel.

Anonymous → Known → Prospects → Lead → Opty

Inactive

Real time change of stage Type on the canvas

Stage Properties

Name: Qoty

Description:

Type: Inventory

Start Tracking by Account

# Change stage type



Close Help

Marketo® **Test 2 (Draft)**

Modeler

Validate Stage Actions Transition Actions

Inventory SLA Gate

```
graph LR; Anonymous --> Known; Known --> Prospects; Prospects --> Lead; Lead --> Opty; Prospects --> Inactive;
```

Stage Properties

Name:  Type:

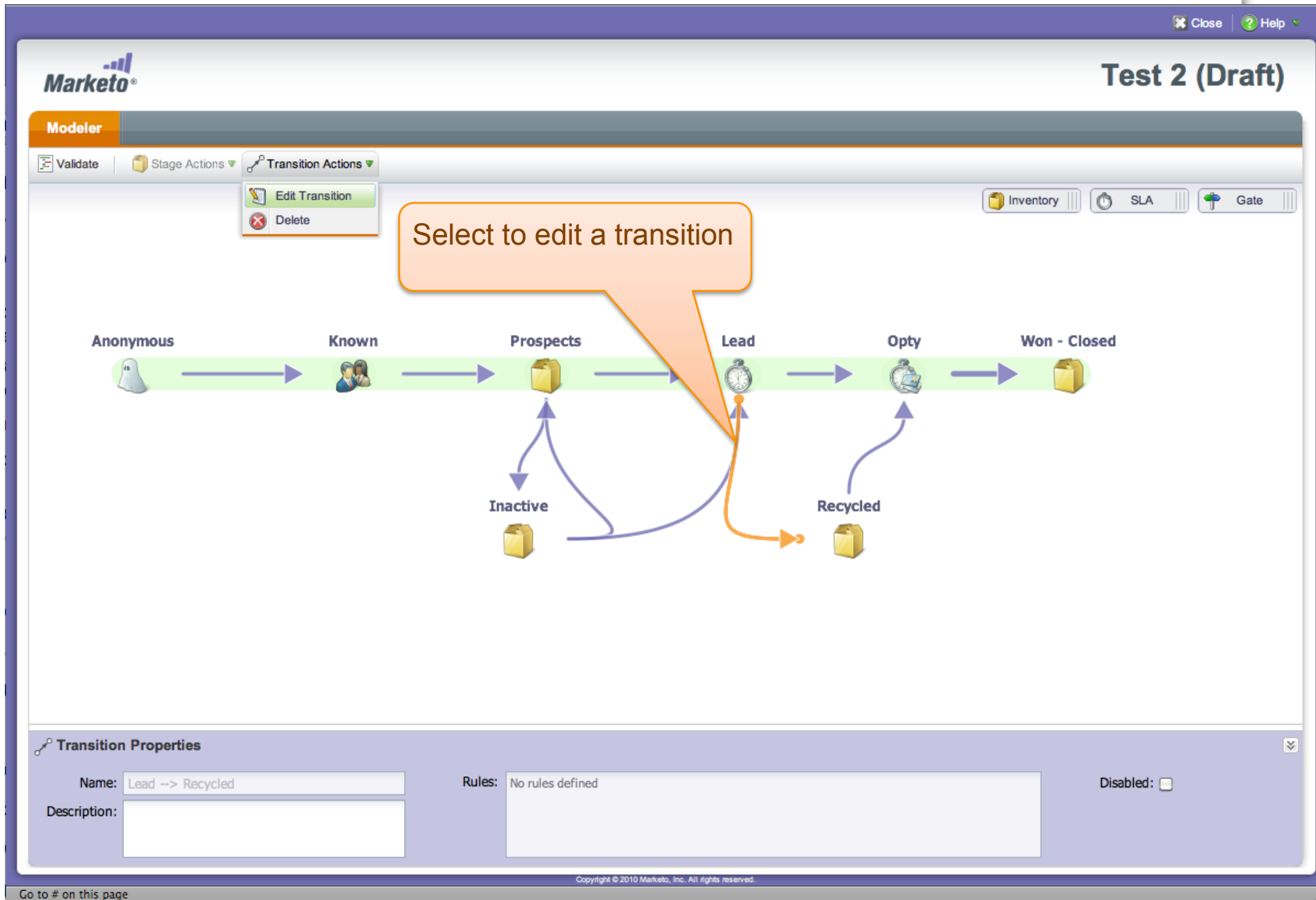
Description:

Start Tracking by Account

Max Age:  days

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# Default Current Analytics Overview Page



The screenshot displays the Marketo Modeler interface for a lead lifecycle. At the top, the Marketo logo is on the left, and "Test 2 (Draft)" is on the right. Below the logo is a "Modeler" tab. A navigation bar includes "Validate", "Stage Actions", and "Transition Actions". A dropdown menu under "Transition Actions" shows "Edit Transition" and "Delete". On the right, there are icons for "Inventory", "SLA", and "Gate".

The main area features a flowchart with stages: Anonymous (ghost icon), Known (people icon), Prospects (box icon), Lead (clock icon), Opty (clock icon), and Won - Closed (box icon). Transitions are shown as arrows between these stages. Below the main flow, there are "Inactive" and "Recycled" stages, both with box icons. Blue arrows show transitions from "Prospects" to "Inactive" and "Recycled", and from "Recycled" to "Opty". An orange arrow points from the "Lead" stage to "Recycled". An orange callout bubble with the text "Select to edit a transition" points to the orange arrow.

At the bottom, the "Transition Properties" panel is visible. It contains the following fields:

- Name:
- Description:
- Rules:
- Disabled:

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Go to # on this page

# Default view to build a transition

The screenshot displays the Marketo Modeler interface for building a transition. At the top, the Marketo logo is on the left, and the window title is "Test 2 (Draft)". Below the logo, there are tabs for "Modeler" and "Lead ⇒ Recycled". The main workspace is a large dashed box containing the text "Drag triggers and filters from the right". To the right of the workspace is a sidebar with a search bar labeled "Find...". The sidebar contains two main categories: "Triggers" and "Filters". Under "Triggers", there is a sub-category "Email" which includes a list of events such as "Added to List", "Campaign is Requested", "Clicks Link", "Data Value Changes", "Fills Out Form", "Has Interesting Moment", "Lead is Created", "Lead Partition Changes", "Removed from List", "Revenue Stage is Changed", "Score is Changed", "Sent Alert", and "Visits Web Page". Under "Filters", there is a sub-category "Lead History" which includes a list of events such as "Alert Was Sent", "Campaign was Requested", "Click Link", "Data Value Changed", "Filled Out Form", "Had Interesting Moment", and "Lead Partition Changed". At the bottom of the interface, there is a small copyright notice: "Copyright © 2010 Marketo, Inc. All rights reserved."

# Edit created transition

The screenshot displays the Marketo Modeler interface for editing a transition. At the top, the title bar shows "Test 2 (Draft)". Below it, the breadcrumb "Prospects → Recycled" is visible. The main workspace shows a sales funnel with stages: Anonymous, Known, Prospects, Opty, and Won - Closed. There are also branches to Inactive and Recycled. A callout box points to the transition between Prospects and Recycled, with the text "Edit a created transition".

**Transition Properties**

Name: Prospects --> Recycled

Description:

Rules: Revenue Stage was Changed

Model contains \_\_\_\_\_

New Stage is \_\_\_\_\_

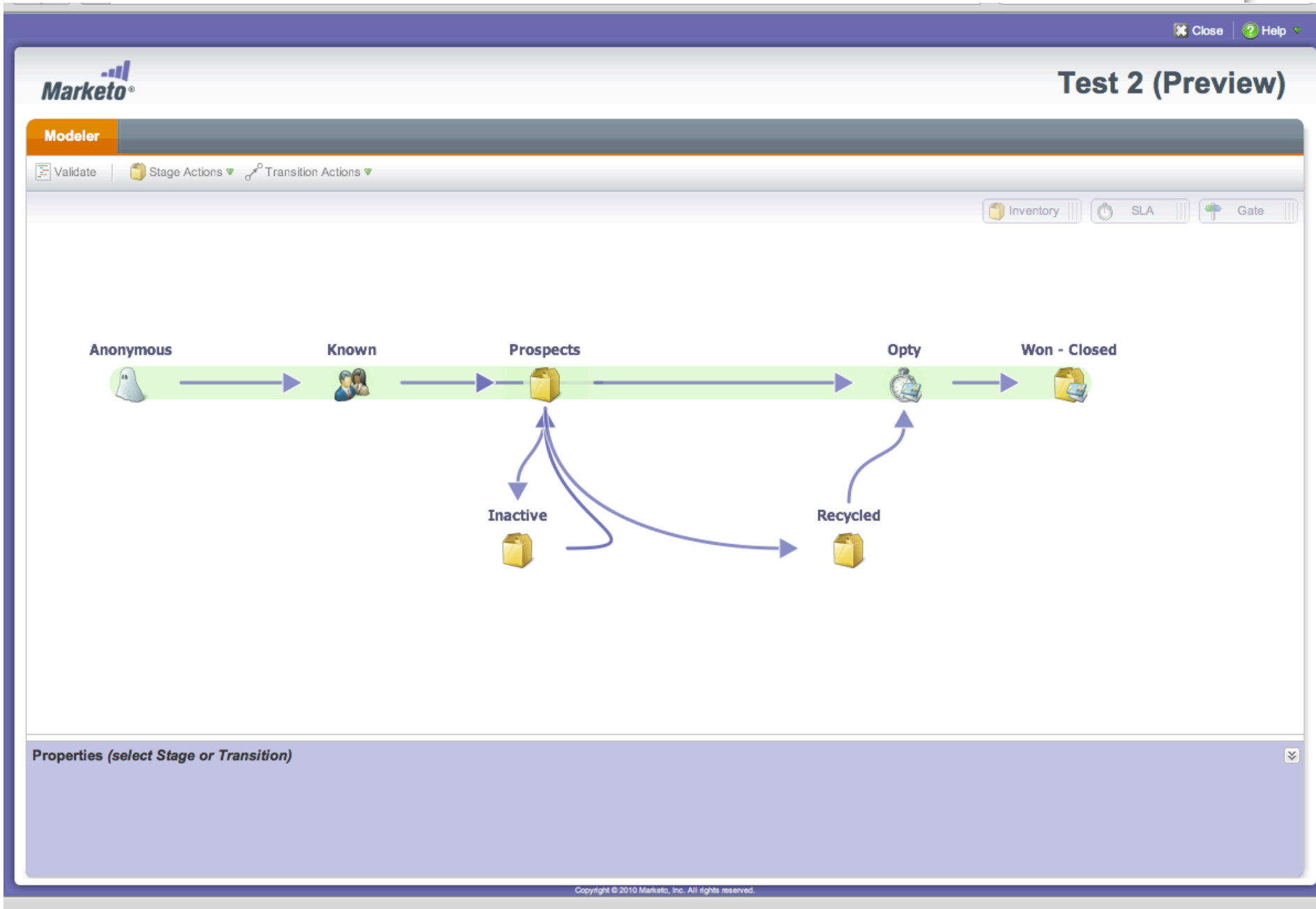
Disabled:

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# Edit Existing Transition

The screenshot shows the Marketo Modeler interface. At the top right, there are 'Close' and 'Help' buttons. The main header area contains the Marketo logo and the text 'Test 2 (Draft)'. Below this is a breadcrumb trail: 'Modeler' > 'Prospects => Recycled'. A toolbar includes 'Use ALL filters', 'Collapse All', and 'Expand All'. An 'Auto-Save' indicator shows 'Jul 15, 12:23pm'. The central focus is a dialog box titled '1 - Revenue Stage was Changed'. It contains two rows of configuration options: 'Model: contains' and 'New Stage: is'. Each row has a dropdown menu, a 'Select...' button, and a green plus icon. An 'Add Constraint' button is also present. On the right side, a 'Find...' search bar is above a tree view of filters. The tree view includes 'Triggers', 'Filters', 'Lead History', 'Email', 'Lead Attributes', 'Company Attributes', 'Salesforce', 'Special Filters', and 'Inactivity Filters'. The 'Email' folder is expanded, showing various events like 'Alert Was Sent', 'Campaign was Requested', etc. The 'Revenue Stage was Changed' event is highlighted in the list.

# Completed Revenue Cycle Model



# Users go to the Lead Database

The screenshot displays the Marketo user interface. At the top, the user is logged in as 'Marketo Administrator'. The navigation menu includes 'My Marketo', 'Marketing Activities', 'Design Studio', 'Lead Database', and 'Analytics'. The 'Lead Database' tab is active, showing a 'Test 2' model. A notification dialog box is overlaid on the screen, titled 'Marketo' with a timestamp of 'Jul 15, 2010 02:27 PM CDT'. The dialog contains the following text: 'Your stages are now available to use in all Smart Lists. Use the Flow Step: **Change Revenue Stage** to assign leads or just approve the model to activate.' At the bottom of the dialog are two buttons: 'Assign Leads' and 'Close'. The background interface shows a sidebar with various report categories and a main content area with 'Model Status: Approved Stages'.