



Revenue Stage Model New RSM Flow

3-26-10

Building a New Revenue Stage Model



➤ Create New Model

- Home Page Default View
 - Create new RSM
- Default RSM view
 - Add single stage unit
 - View Stage Properties
 - View Transition Properties
- Add additional stage unit
- Create Transition Properties with smart list for previous stage
- Show RSM build out no selection
 - Stage selected with all transitions in view

RSM Homepage – FIRST EXPERIENCE

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

Revenue Stage Modeler

New v Auto Save

Revenue Stage Modeler

Happy Path "Friendly text about the RSM"

- Select to create a new RSM or clone a Marketo Example
- Add Stages and define stage to stage Transitions
- Prepare Revenue Stage Model for deployment

RSM Homepage – FIRST EXPERIENCE

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

Revenue Stage Modeler

New v Auto Save

- New Report
- New Subscription
- New Revenue Stage Model**

Analytics

- Revenue Stage Modeler
 - My Models
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Happy Path

"Friendly text about the RSM"

Select to create a new RSM or clone a Marketo Example

Add Stages and define stage to stage Transitions

Prepare Revenue Stage Model for deployment

New Dialog

Revenue Stage Modeler

- Analytics
 - Revenue Stage Modeler
 - My Models
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Happy Path "Friend"

Select to create a new RSM or clone a Marketo Example

New Revenue Stage Model

Name:

Description:

New Dialog

- Analytics
 - Revenue Stage Modeler
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 - Example 3

Revenue Stage Modeler

New Revenue Stage Model

Name:

Description:

Create

Cancel

Select to create a new RSM or clone a Marketo Example

Default View – Stage Properties

Tree
RSM instance (My RSM 1)
added Under My Models

Stage Palette – Stage Types
-Inventory
-SLA
-Evaluation (Gate)

The screenshot displays the 'Stage Properties' interface. On the left is a tree view under 'Revenue Stage Modeler' containing 'My Models' (with 'My RSM 1' selected) and 'Marketo Examples' (with 'Example 1', 'Example 2', and 'Example 3'). The main workspace shows a stage diagram with two stages, 'Anonymous' and 'Known', connected by a transition arrow. A 'Delete Stage' button is visible above the diagram. Below the diagram are two tabs: 'Stage Properties' (active) and 'Transition Properties'. The 'Stage Properties' panel includes fields for Name, Description, Aggregate Class, Type, Time Period, Value, and Track by Account, along with a placeholder for 'Other meta data options here.' A 'Stage Palette' is visible in the top right corner of the workspace, showing three stage icons.

Stage Properties and
Transition Properties tabs

Name:

Description:

Aggregate Class:

Type:

Time Period:

Value:

Track by Account:

Other meta data options here.

Default View – Transition Properties Pane



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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
 - My Models
 - My RSM 1
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Anonymous → Known

Hide Detours (0)

Stage:

Stage Properties → Transition Properties

Transitions From New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

** Indicates default Transition*

New Stage

Marketo

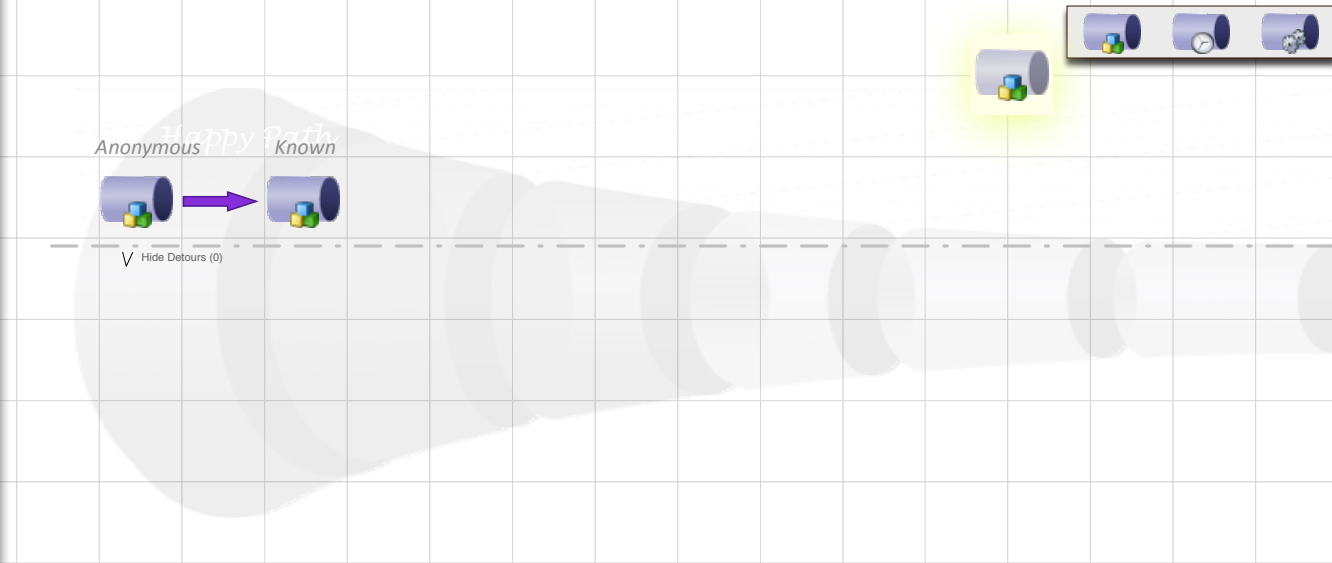
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

- Analytics
 - Revenue Stage Modeler
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 - My RSM 1
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Stage:

Stage Properties Transition Properties

Name:

Type:

Description:

Time Period:

Value:

Aggregate Class:

Track by Account:

Other meta data options here.

New Stage 2

Marketo

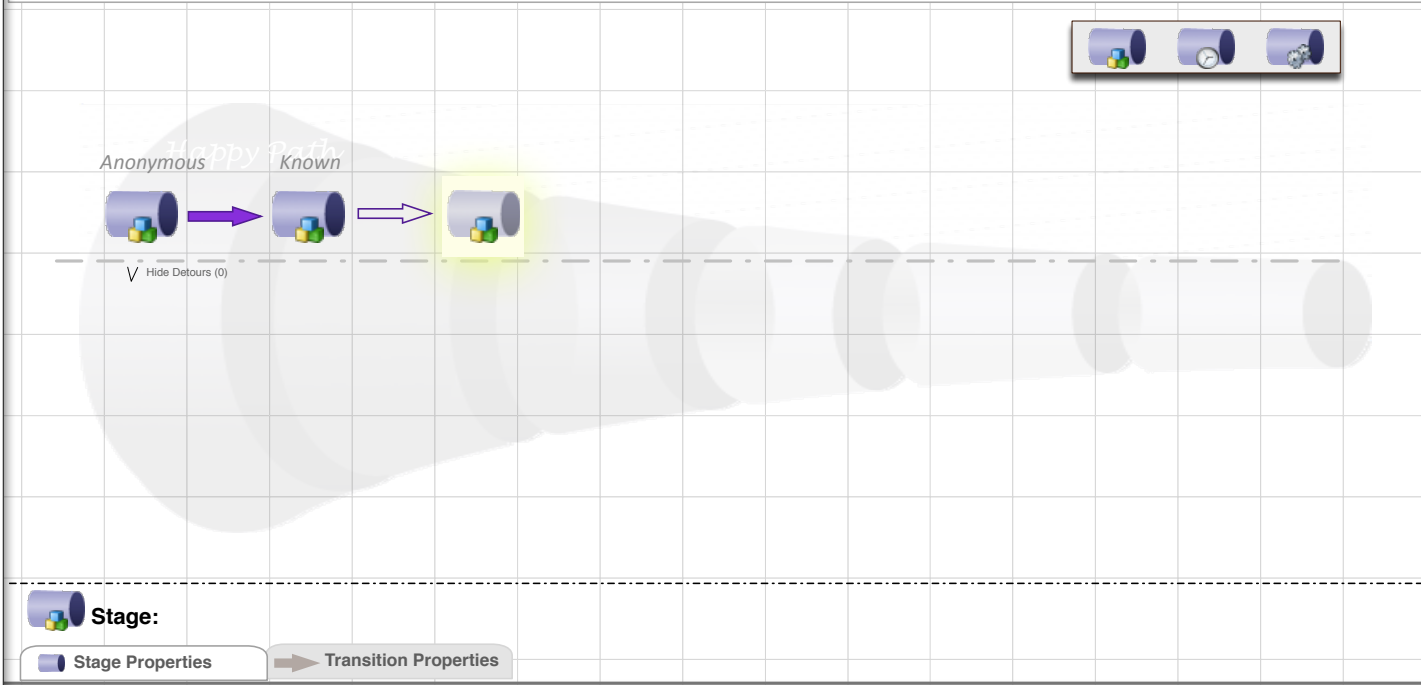
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

- Analytics
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Name:

Description:

Aggregate Class:

Type: **Inventory**

Time Period:

Value:

Track by Account:

Other meta data options here.

Stage Properties Defined

Marketo

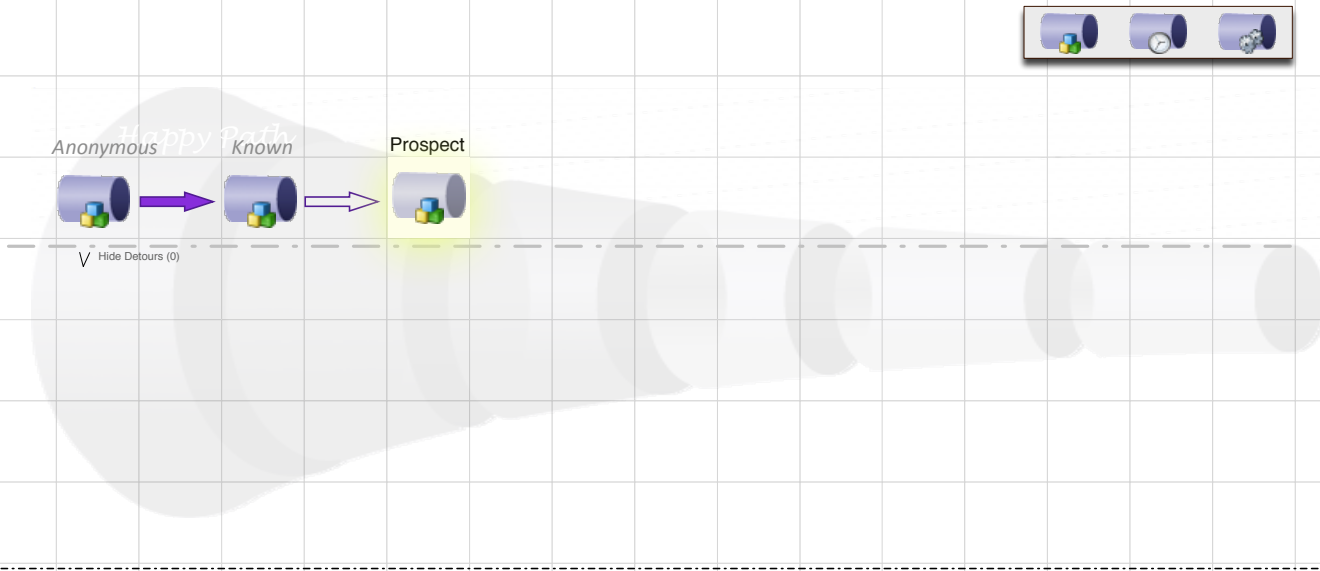
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage: Prospect

Stage Properties Transition Properties

* Name: Type: **Inventory**

Description:

* Time Period:

Value:

Aggregate Class: Track by Account:

Other meta data options here.

Another Stage Added

Marketo

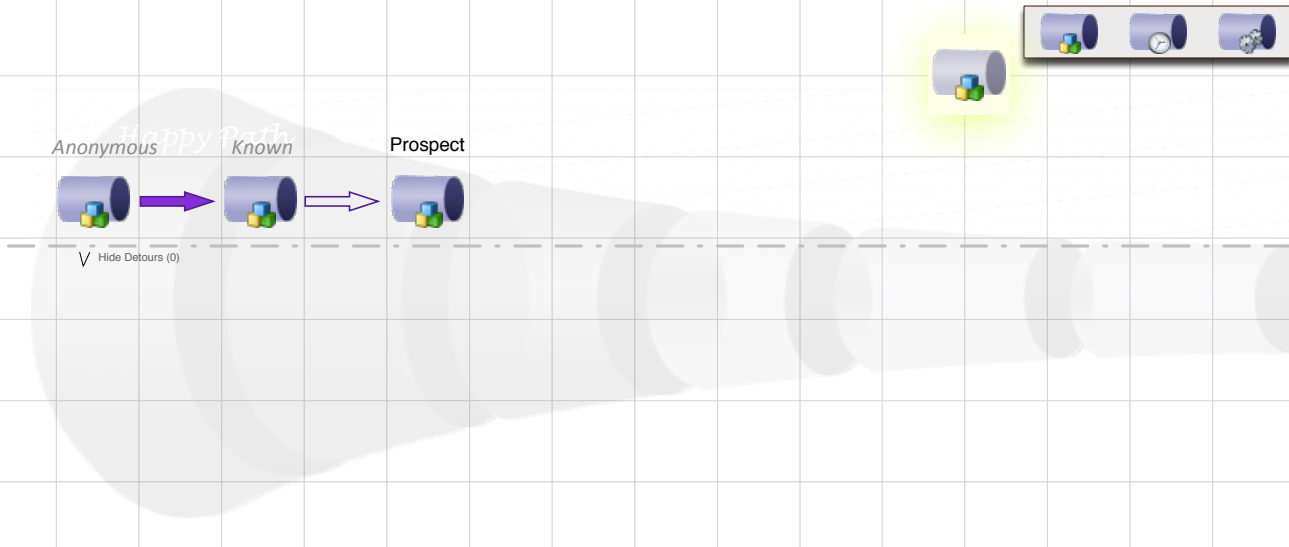
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

- Analytics
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Stage: Prospect

Stage Properties Transition Properties

Name: Type: **Inventory**

Description:

Time Period:

Value:

Aggregate Class: Track by Account:

Other meta data options here.

Stage Properties Defined



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Marketo

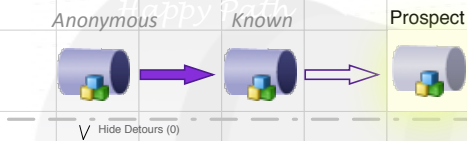
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

- Analytics
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Stage: Prospect

Stage Properties Transition Properties

* Name:

Type: **Inventory**

Description:

* Time Period:

Value:

Aggregate Class:

Track by Account:

Other meta data options here.

Another Stage Added

Marketo

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Anonymous Known Prospect



Hide Detours (0)

Stage: Prospect

Stage Properties Transition Properties

* Name:

Description:

Aggregate Class:

Type: **Inventory**

* Time Period:

Value:

Track by Account:

Other meta data options here.

Lead Stage Added



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Marketo

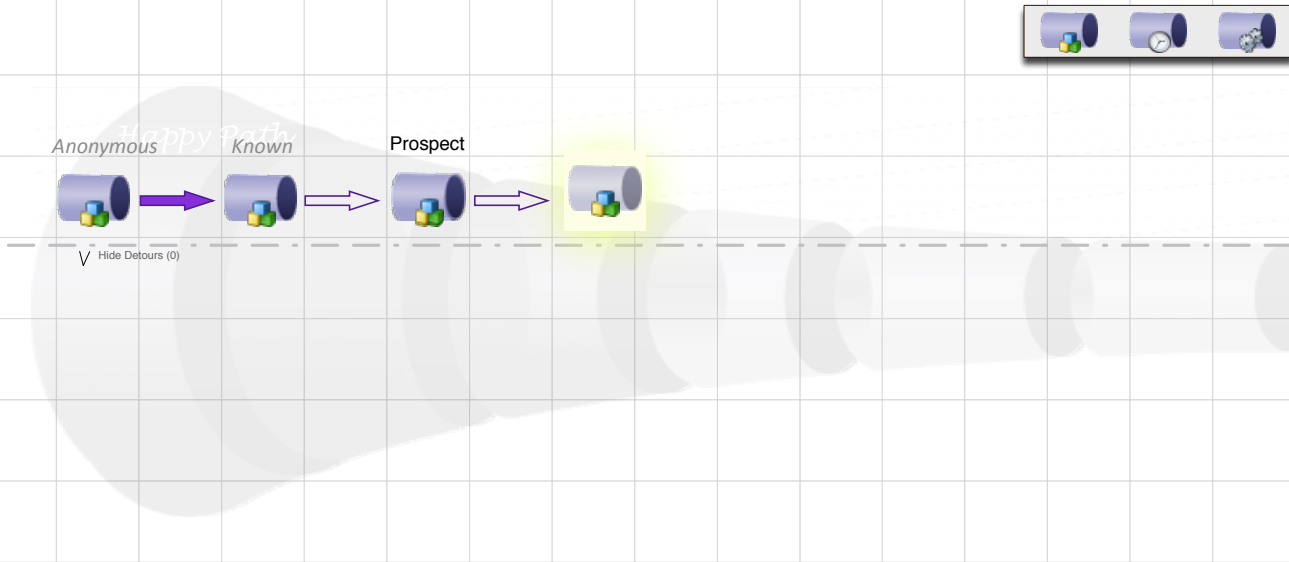
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage: Prospect

Stage Properties Transition Properties

* Name:

Description:

Aggregate Class:

Type: **Inventory**

* Time Period:

Value:

Track by Account:

Other meta data options here.

Lead Stage Added

Marketo

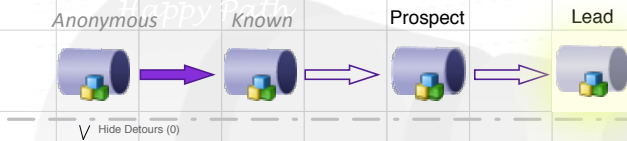
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage: Lead

Stage Properties Transition Properties

* Name:

Type: **Inventory**

Description:

* Time Period:

Value:

Aggregate Class:

Track by Account:

Other meta data options here.

Lead Stage Added

Marketo

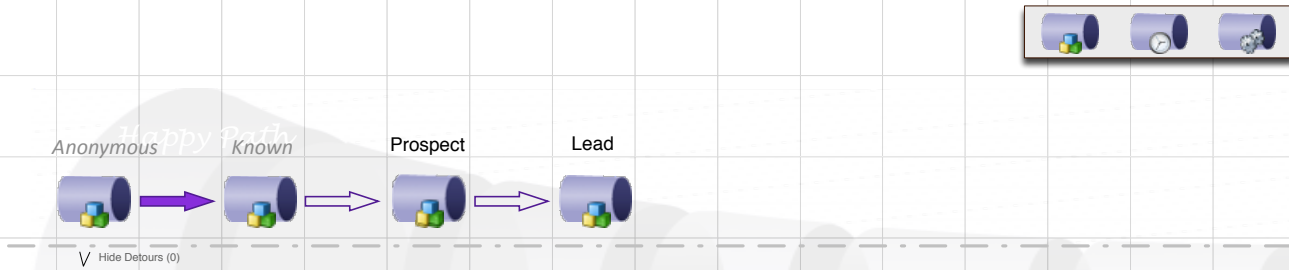
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage:

Stage Properties Transition Properties

* Name:

Description:

Aggregate Class:

Type: **Inventory**

* Time Period:

Value:

Track by Account:

Other meta data options here.

Note on Stage & Transition Behavior

- ▶ Adding a 'unit' to the Happy Path
 - A transition is required for stage to stage path
 - The unit is defined at both the stage and transition into the new stage
- ▶ Adding a stage to Detour
 - Adds ONLY a stage
 - There is no required transition

RSM Completed

- ▶ Scenario
 - User has added multiple Happy Path stages
 - User has added multiple detour stages
 - User wants to review transitions for different stages

RSM Built Out



Marketeto

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Anonymous → Known → Prospect → Lead → Sales → Sales Lead → Oppty → Won

Inactive Recycled Disqual Lost

Stage: Stage Properties Transition Properties

Transitions From New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Inactive Stage Selected– All Transitions

Marketo

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

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Stage: Inactive

Transitions From Inactive

Order	Move	To Stage	Description	Enable	Edit	Delete
1		* <u>Prospect</u>	ipsum nasum aquim...	<input type="checkbox"/>		
2	▲	<u>Lead</u>	ipsum nasum aquim...	<input type="checkbox"/>		
3	▲	<u>Sales</u>	ipsum nasum aquim...	<input type="checkbox"/>		
4	▲	<u>Sales Lead</u>	ipsum nasum aquim...	<input type="checkbox"/>		
5	▲	<u>Oppty</u>	ipsum nasum aquim...	<input type="checkbox"/>		
6	▲	<u>Won</u>	ipsum nasum aquim...	<input type="checkbox"/>		

* Indicates default Transition

Inactive Selected – Transitions Properties

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

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Stage: Prospect

Stage Properties Transition Properties

Transitions From Prospect New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		* <u>Lead</u>	ipsum nasum aquim...	<input type="checkbox"/>		
2		<u>Sales</u>	ipsum nasum aquim...	<input type="checkbox"/>		
3		<u>Sales Lead</u>	ipsum nasum aquim...	<input type="checkbox"/>		
4		<u>Oppty</u>	ipsum nasum aquim...	<input type="checkbox"/>		
5		<u>Won</u>	ipsum nasum aquim...	<input type="checkbox"/>		
6		<u>Inactive</u>	ipsum nasum aquim...	<input type="checkbox"/>		

* Indicates default Transition

Modify a Non-Deployed Model

- ▶ Inserting a stage
- ▶ Delete a stage
 - Messaging for stage and transitions

Insert a Stage

Marketo

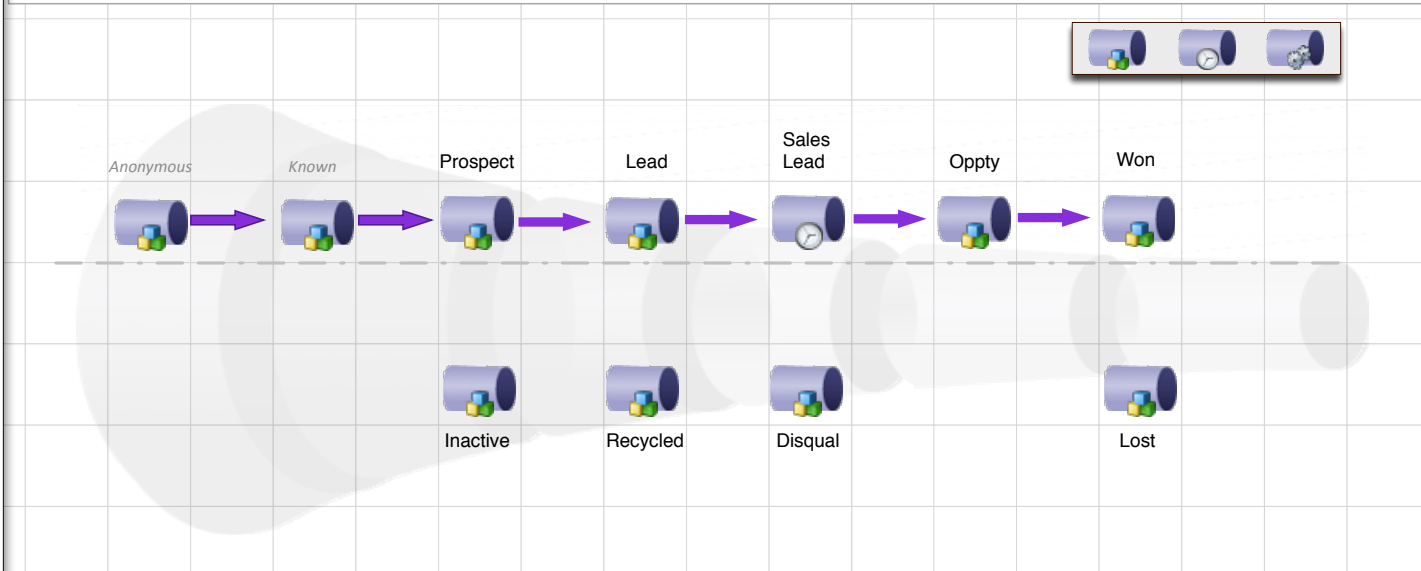
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage:

Stage Properties ➔ Transition Properties

Transitions From

New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Insert Stage between Lead & Oppty

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

My RSM 1 Modeler

RSM Actions v | [Deploy Model](#) [Delete Stage](#) Auto Save

Analytics

- Revenue Stage Modeler
 - My Models
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 - Example 3

Anonymous → Known → Prospect → Lead → Sales Lead → Oppty → Won

Inactive Recycled Disqual Lost

Stage: Stage Properties Transition Properties

Transitions From [New Transition](#)

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Insert a Stage

Marketo

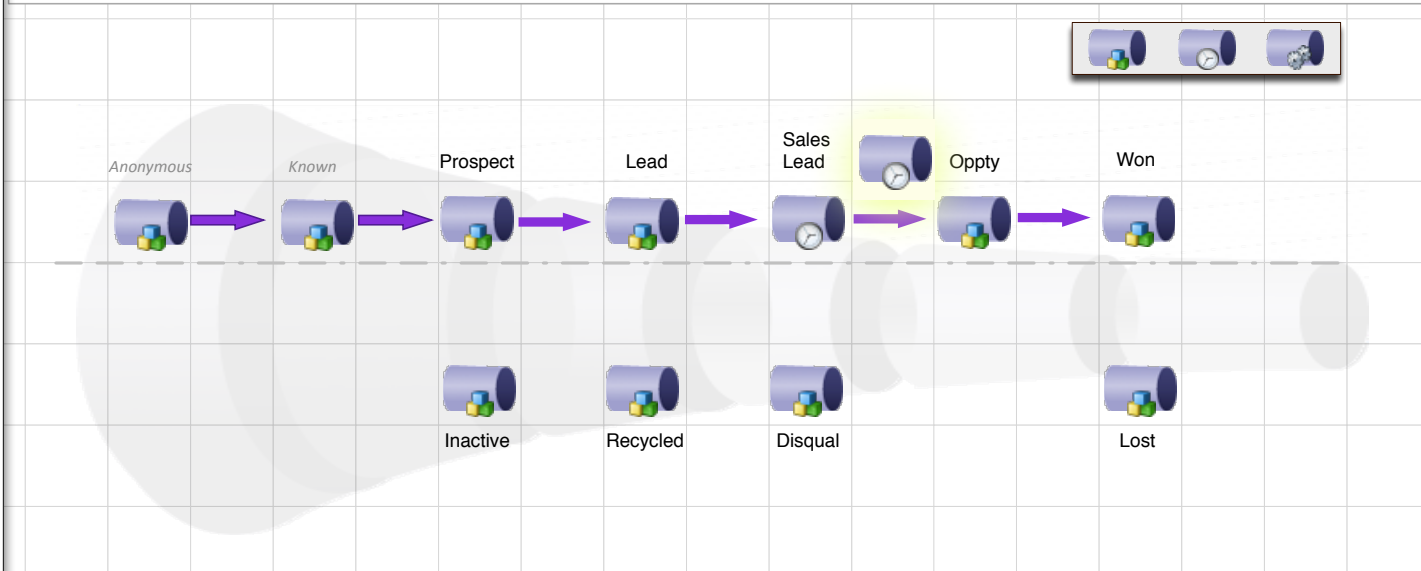
My Marketo Marketing Activities Design Studio Lead Database **Analytics** Forecasting

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

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Stage:

Stage Properties ➔ Transition Properties

Transitions From

New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Insert a Stage

Marketo

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
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Stage: Qualified

Stage Properties Transition Properties

Name: Type: **SLA**

Description:

Time Period:

Value:

Aggregate Class: Track by Account:

Other meta data options here.

* Indicates default Transition

Transition is transformed into Accelerated Path



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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

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 - Example 3

Stage: Sales Lead

Stage Properties Transition Properties

Name: Sales Lead Type: SLA

Description: [] Time Period: Weekly

Value: 4

Aggregate Class: Marketing Qualified Lead Track by Account: []

Other meta data options here.

* Indicates default Transition

Delete a Stage

- ▶ User selects a stage and then selects 'Delete Stage'

Delete a Stage

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

My RSM 1 **Modeler**

RSM Actions v | Auto Save

Delete Stage

Deleting the "Lead" stage will remove all associated smart lists transitions?

Are you sure you want to delete this stage?

Stage: Lead

Name: Type: **Inventory**

Description:

Time Period:

Value:

Aggregate Class: Track by Account:

Other meta data options here.

Delete a Stage – Happy Path Shifts

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

My RSM 1 Modeler

RSM Actions v | Auto Save

Analytics

- Revenue Stage Modeler
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```

    graph LR
      A[Anonymous] --> B[Known]
      B --> C[Prospect]
      C --> D[Sales Lead]
      D --> E[Qualified]
      E --> F[Oppty]
      F --> G[Won]
      C --> H[Inactive]
      D --> I[Recycled]
      E --> J[Disqual]
      G --> K[Lost]
    
```

Stage:

Name:

Description:

Aggregate Class:

Type:

Time Period:

Value:

Track by Account:

Other meta data options here.

Deploy a New Model

- ▶ Deploy Model
 - Check for completeness
 - If errors, ask to continue or cancel
 - If no errors, confirmation
 - Pop up to offer option to go to Marketing Activities or Lead Database to complete process of getting leads into RSM

Deployed RSM with Errors

Marketo

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

My RSM 1 Modeler

RSM Actions V | Deploy Model Delete Stage Auto Save

Anonymous → Known → Prospect → Lead → Sales → Sales Lead → Oppty → Won

Inactive Recycled Disqual Lost

Stage: Stage Properties Transitions Properties

Transitions From

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2	▲			<input type="checkbox"/>		

New Transition

* Indicates default Transition

Deployed RSM with Errors

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

My RSM 1 Modeler

RSM Actions V | Deploy Model Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
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Deployment Errors

⚠ Your Revenue Stage Model is incomplete. Please check the model before you deploy.

OK Cancel

Stage: Stage Properties Transitions Properties

Transitions From

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2	⬆			<input type="checkbox"/>		

New Transition

* Indicates default Transition

RSM - Errors

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
 - My Models
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Anonymous → Known → Prospe → Lead → Sales → Sales Lead → Oppty → Won

Inactive Recycled Disqual Lost

Icons indicate issues to check.

Stage: Stage Properties Transitions Properties

Transitions From New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Deployment – No Errors

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage Auto Save

Analytics

- Revenue Stage Modeler
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Anonymous Known Sales Empty Won

Confirm Deployment

Congratulations!
Your Revenue Stage Model is ready for deployment.

OK Cancel

Stage: Stage Properties Transitions Properties

Transitions From New Transition

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

Deployment – No Errors

Marketo

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

My RSM 1 Modeler

RSM Actions v | Deploy Model Delete Stage

Auto Save

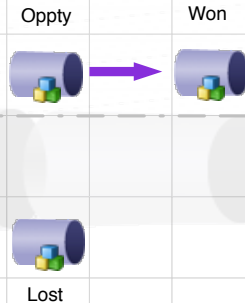
- Analytics
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Anonymous

Deploy Revenue Stage Model

Your model is deployed. To process leads which currently exist in your lead database you must assign the leads to a revenue stage.

- Go to Marketing Activities to create campaigns that will move leads into the Revenue Stages
- Go to the Lead Database to perform single flow actions to move leads into the Revenue Stages



Stage:

Transitions From

Order	Move	To Stage	Description	Enable	Edit	Delete
1		*		<input type="checkbox"/>		
2				<input type="checkbox"/>		

* Indicates default Transition

View Members Pop Up

Filter: None

ID	Date/Time (PST)	Activity Type	Detail	Lead Name	Company
8420515	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "0" to "-5"	Don Ake	Walsh University
8420513	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from "0" to "-5"	Don Ake	Walsh University
8420501	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "" to "-5"	don devault	devault & strelow
8420498	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	don devault	devault & strelow
8420491	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "0" to "-5"	Alison Dunstan	Nedbank Ltd
8420489	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from "0" to "-5"	Alison Dunstan	Nedbank Ltd
8420474	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "" to "-5"	Edward Gallagher	Ernst & Young
8420473	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "" to "-5"	Peter Kowler	Blue Cross and Blue Shi...
8420472	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Peter Kowler	Blue Cross and Blue Shi...
8420467	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Edward Gallagher	Ernst & Young
8420336	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "" to "-5"	Boon Teck Ong	Adval Brand Group
8420334	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Boon Teck Ong	Adval Brand Group
8420305	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "0" to "-5"	marco granchelli	baker hughes
8420303	Feb 24, 2010 02:22 pm	Change Score	Changed Lead Score from "0" to "-5"	John Bennett	Hospital Network
8420302	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from "0" to "-5"	John Bennett	Hospital Network
8420301	Feb 24, 2010 02:22 pm	Change Data Value	Changed Lead Score from "0" to "-5"	marco granchelli	baker hughes
8275880	Feb 17, 2010 04:22 pm	Change Score	Changed Lead Score from "" to "-5"	Christine Niese	Westfield
8275879	Feb 17, 2010 04:22 pm	Change Score	Changed Lead Score from "" to "-5"	Cindy Rains	White River Valley Electric
8275876	Feb 17, 2010 04:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Christine Niese	Westfield
8275875	Feb 17, 2010 04:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Cindy Rains	White River Valley Electric
8275868	Feb 17, 2010 04:23 pm	Change Score	Changed Lead Score from "" to "-5"	Kevin Shea	Win Life Enterprise Ltd.
8275862	Feb 17, 2010 04:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Kevin Shea	Win Life Enterprise Ltd.
8275831	Feb 17, 2010 04:22 pm	Change Score	Changed Lead Score from "0" to "-5"	Gabryel Cosanni	Universal Orlando Resort
8275827	Feb 17, 2010 04:22 pm	Change Data Value	Changed Lead Score from "0" to "-5"	Gabryel Cosanni	Universal Orlando Resort
8275820	Feb 17, 2010 04:22 pm	Change Score	Changed Lead Score from "" to "-5"	Phil Lauterjung	WPSS, Inc.
8275819	Feb 17, 2010 04:22 pm	Change Data Value	Changed Lead Score from [null] to "-5"	Phil Lauterjung	WPSS, Inc.

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RCM Instance Home Page

05-18-10

New Model Instance Overview Page



First Experience - Existing Customers

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

My RSM 1 Modeler

RSM Actions v Not Deployed

Analytics

- Revenue Stage Modeler
 - My Models
 - My RSM 1
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Model

Build your revenue cycle and start processing leads now.

LEADS Default

30,375

86,957

Anonymous Leads

Known Leads

All Time

Updated Apr 09, 2010 03:10 am CDT

Deployment Status

Deployed Model



On Going Use

Status and State
Operational Information

Marketo

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

My RSM 1 Modeler

RSM Actions v Auto Save

Deployed 05/18/2010, 10:25 am EST

How does this change for a deployed model.

- Analytics
 - Revenue Stage Modeler
 - My Models
 - My RSM 1 ✓
 - My RSM 1 - Draft
 - Marketo Examples
 - Example 1
 - Example 2
 - Example 3

Model

Build your revenue cycle and start processing leads now.

Analytics Reporting

Leverage the power of your data to increase your ROI.

Overview **Summary**



LEADS
Default






All Time
Updated Apr 09, 2010 03:10 am CDT



This would be the format of the Summary Tab




Program Summary
Jump to... ▾

Tab would say 'Summary' and list each stage and the transitions per stage

 **Email Blast for eBizQ** 

-  **Summary**
-  **Smart List (3)**
-  **Flow (1)**
-  **Batch Run History (2)**
-  **Email Sent**

 **Email blast #2 for 5/30** 

-  **Summary**
-  **Smart List (3)**
-  **Flow (1)**

For Presentation

- ♦ Tree with multiple in progress RSM and deployed RSM
- ♦ Spec still needs
 - What happens when a user creates their first RSM and they have workspaces turned on
 - Need to decide if we want to have a RSM Admin role
 - Complete Deployment
 - Redeploy current version
 - Deploy new version
 - Finish detailing examples
 - Finish specifications Home Page
- ♦ Read Only RSM View

Re-Deploy a RSM

- ▶ Validate RSM
 - Process to select stage to move orphans to
 - From previous delete stage action
 - Message for RSM incomplete
 - Location of message
 - Pop up dialog
 - 'my rsm 1' home tab