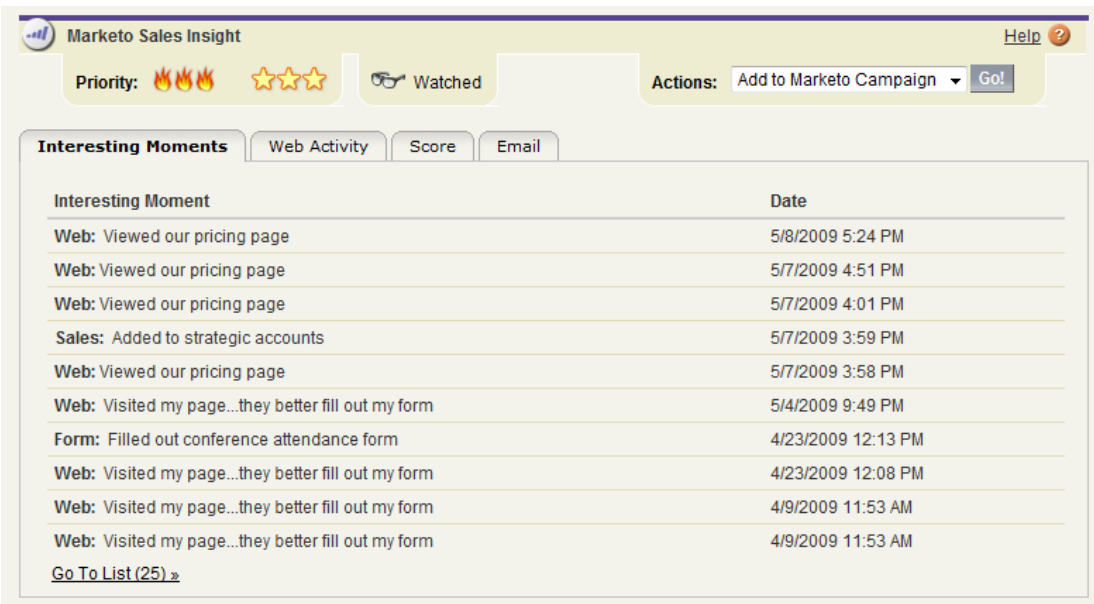
Sales Insight in Salesforce

This is a brief overview of Marketo Sales Insight for Salesforce users.

Detailed marketing history

Before you're assigned a lead, he or she has a long history of marketing touches including watching demos, reading emails, and viewing web pages.

To view this in Salesforce, first open any **lead**. Then scroll down to the **Marketo Sales Insight** section, just below the lead details. It will look like this:



Priority, Urgency, and Relative Score

Marketo Sales Insight pics your best leads and contacts based on their **priority**. A lead or contact's priority has two components -- **urgency** and **relative score**.

These are derived from the **lead score** -- a measure of the person's interest in your product(s). The higher a person's lead score (and thus the higher a person's priority), the more likely he or she will respond positively to a call from your sales team.

Note: You need several scoring campaigns to get the full value of priority, urgency, and relative score. With too few or no scoring campaigns, these fields won't be useful.

Urgency
The flames represent urgency -- how much this person's lead score has changed recently. A high urgency (more flames) means that this lead's score has increased lots lately; it's a good sign that this lead is interested in your offer. You should follow up with this person quickly!

For example, a lead who requested a demo and visited several web pages will probably have a very high urgency. A lead who didn't visit your web page or open your emails will have a low urgency. Use urgency to prioritize who needs to be contacted next.

Relative Score
The stars represent relative score -- a measure of how this person's lead score compares to everyone else's. A high relative score means this person is probably more interested and informed about your offer compared to people with lower relative scores.

If two leads have the same urgency, you can use relative score to tell which one deserves a phone call first. The one with the higher relative score may react more favorably to your offer versus the lower one.

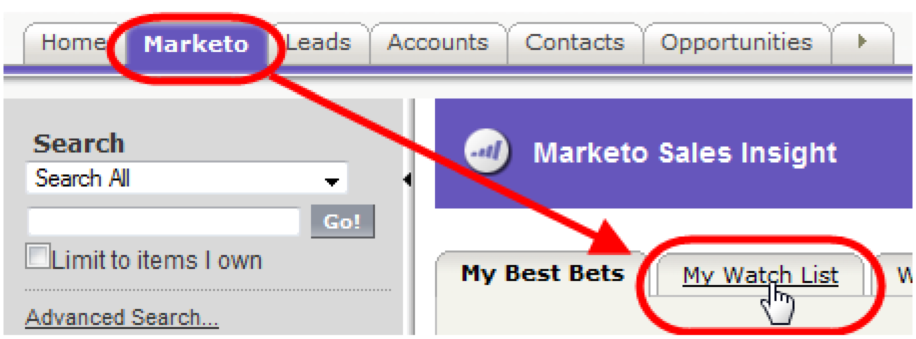
How Urgency and Relative Score are calculated
To calculate the number of stars and flames, first your leads and contacts are sorted by score or score change (for Relative Score and Urgency, respectively). Then they're divided into tiers -- the top tier receives the most stars or flames, the next receiver fewer, and so on down.

As scores change, urgency, priority, and relative score values are immediately recalculated so that your Best Bets are always up to date. The urgency and relative score tiers are automatically calculated every night on Marketo servers.

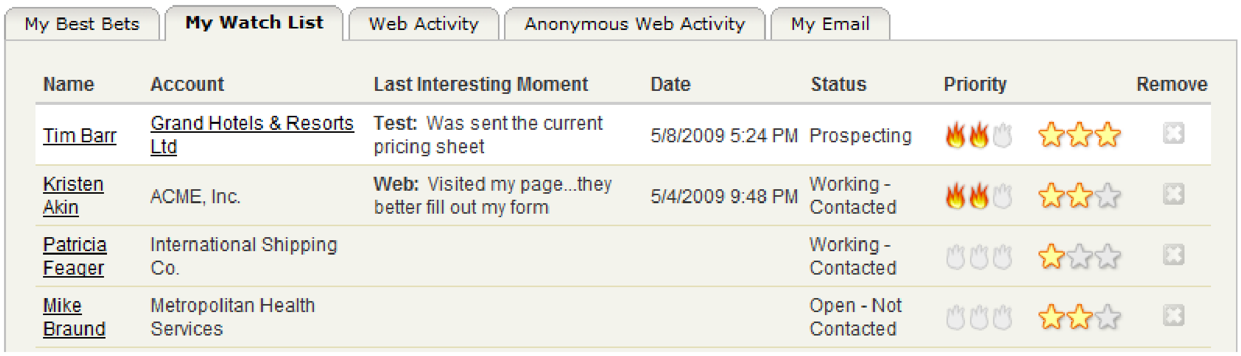
Using My Watch List

In your Watch List, you can bookmark your leads and contacts in a single place for quick viewing. After you add a lead to your Watch List, the lead will also appear in your Lead Feed.

Viewing your Watch List
Click on the **Marketo** tab. After the page loads, click on the **My Watch List** tab.



Initially, it will be empty. As you add leads to it, it will look like this:

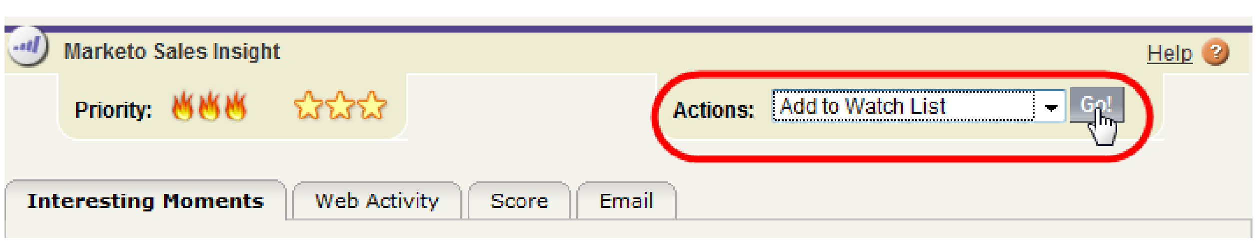


Column	Description
Name	This person's name
Account	Account name (with link) or company name
Last Interesting Moment	The most recent Interesting Moment for this person
Date	When the Last Interesting Moment occurred
Status	Lead status
Priority	Urgency and relative score
Remove	Take this person off your Watch List

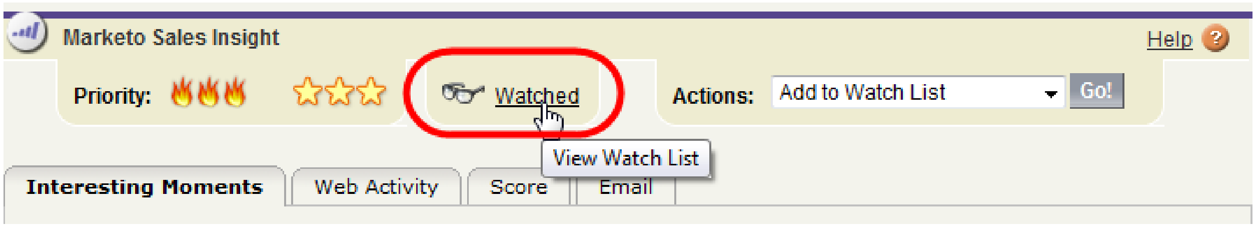
Adding people to the Watch List

Go to any lead or contact page and scroll down to the Marketo Sales Insight section. In the Actions menu, pick **Add to My Watch List**.

Note: If you just created this lead in Salesforce, **Add to Watch List** may not work right away. If so, wait a few minutes for the lead to sync with Marketo and then try again.

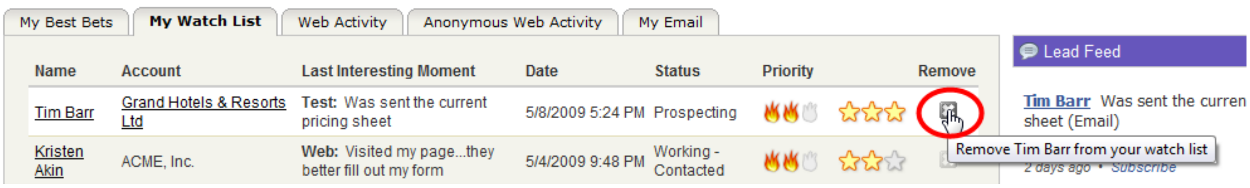


You'll see the **Watched** icon and link appear, confirming this person has been added to your Watch List. Click that link to go directly to your Watch List.

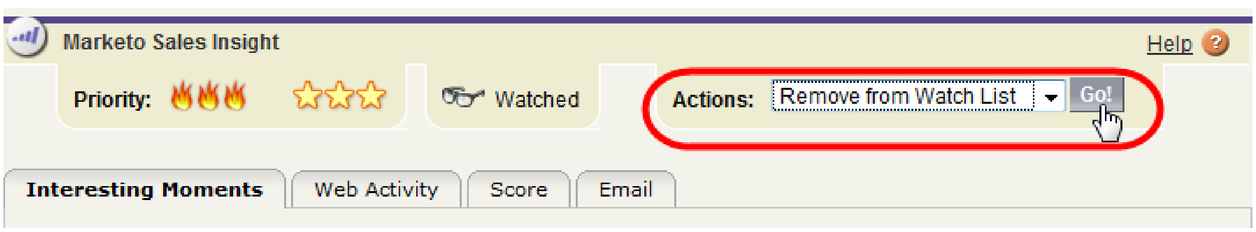


Removing people from the Watch List

One way to remove a person from your watch list is to go to the Watch List and click the **X** at the end of the row.



You can also remove the person by going to the lead or contact detail page and picking **Remove from Watch List** in the **Actions** menu.



Tracking Anonymous Web Activity in Salesforce

Marketo can identify companies of people who visit your website but don't fill out any contact forms. These are called Anonymous visitors. Some may be new leads that are worth prospecting; others may be existing leads spending time on your website.

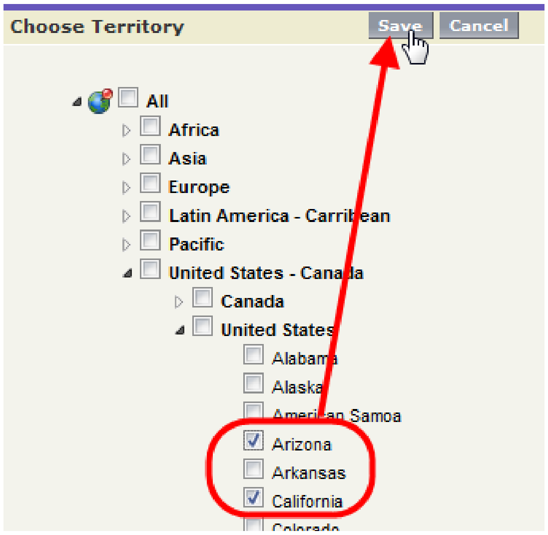
Their activity is listed in the **Anonymous Web Activity** tab of the Sales Insight Dashboard. Using information we retrieve from a reverse IP lookup, you can get detailed information about these leads. It will be blank by default, but after you add some territories you'll see this info:

Section	Description
Time Frame	How far back in time to look for anonymous web activity
Page Views	Number of pages viewed in this time frame
Company	Name of the company from reverse IP lookup
Last Visit	Time and date of the last visit by this person
Research	Search other sites (Jigsaw, Demandbase, or LinkedIn) for lead info
Choose Territory	Filter which anonymous visitors appear (see below)

Choosing your territories

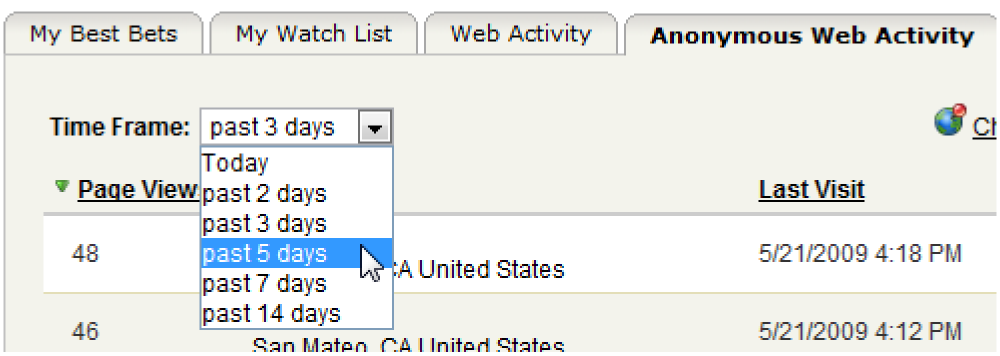
Leads are shown based which territories you choose to monitor. To set up these territories, click the Choose Territory link in the upper right of the panel.

Check the boxes next to the territories you manage, then click **Save**. Your **Anonymous Web Visitors** tab will populate with any matching leads when you're done.



Changing the date range

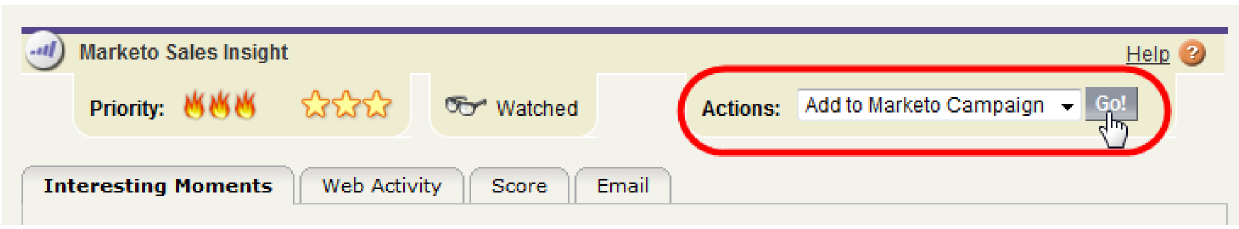
If you don't see any leads or want to change the date range for searching anonymous web activity, try the **Time Frame** option. In that pulldown, you can pick how many days in the past to search for anonymous web activity. After changing the time frame, the view will automatically refresh with new data.



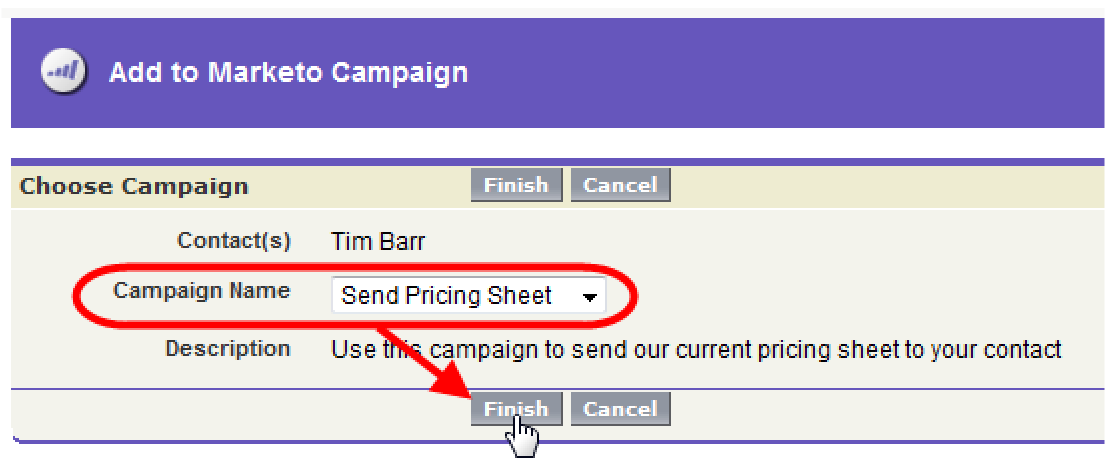
Adding people to Marketo Campaigns from Salesforce

Your Marketo administrator has created several special campaigns for your leads and contacts. Typical examples include sending someone a whitepaper about a new product or mailing a series of nurturing emails for people not ready for sales.

To add a lead or contact to one of these campaigns, go to that person's detail page and find the **Actions** menu in the **Marketo Sales Insight** section. Pick **Add to Marketo Campaign** and click **Go**:



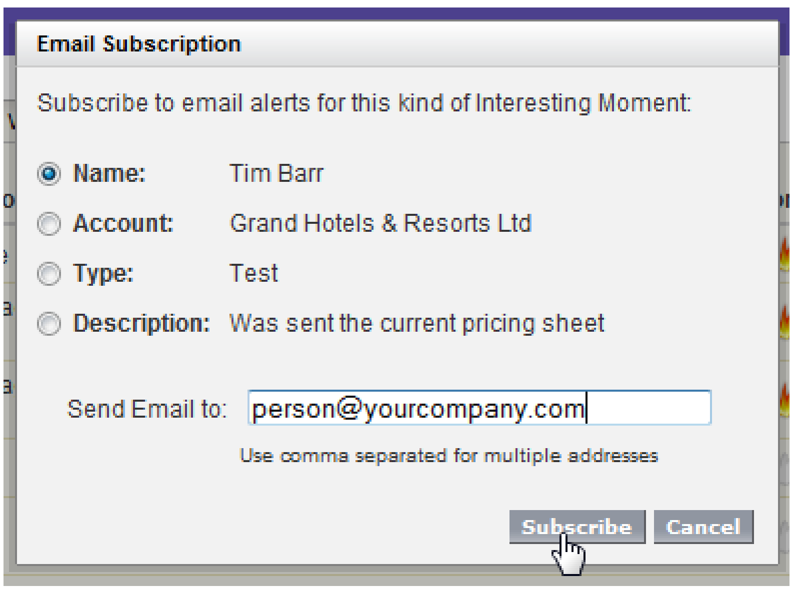
You'll see a list of potential campaigns; below the selected campaign is a brief description provided by your marketing team. Pick the campaign for this person in the **Campaign Name** pulldown, then click **Finish**:



Subscribing to Lead Feed emails

You can choose to receive email notifications of certain Interesting Moments by clicking the **Subscribe** link beneath any event:

In the dialog that appears, pick what event should trigger the email -- Interesting Moments by the same person, account/company, type, or description. Also enter the email address where the alerts should be sent. Click **Subscribe** when you're done.



You'll start receiving email updates for matching events from now on.

Receiving Lead Feed emails on your mobile phone

Most mobile phone carriers will let you receive emails on your phone just like text messages. Your phone's email address is a variation on your phone number.

Some common carriers and email addresses are below. Replace "[10-digit phone number]" with your phone number (ex. "6505551234").

Note: Some carriers or phone plans may charge for this service. Please check with your carrier for details.

Carrier	Email address
Alltel	[10-digit phone number]@message.alltel.com
AT&T	[10-digit phone number]@txt.att.net
Boost Mobile	[10-digit phone number]@myboostmobile.com
Nextel	[10-digit phone number]@messaging.nextel.com
Sprint PCS	[10-digit phone number]@messaging.sprintpcs.com
T-Mobile	[10-digit phone number]@tmomail.net
Verizon	[10-digit phone number]@vtext.com
Virgin Mobile USA	[10-digit phone number]@vmobl.com

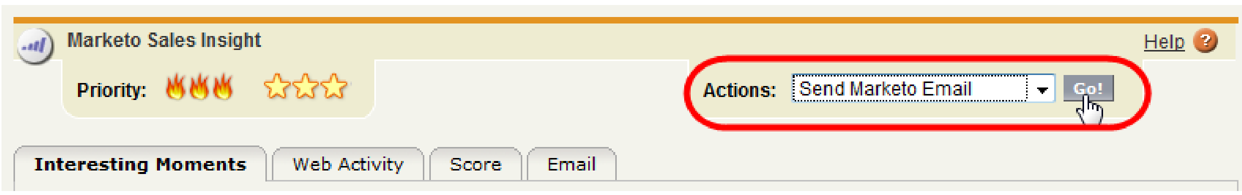
*You are able to unsubscribe from the actual emails

Sending a Marketo Email with Sales Insight

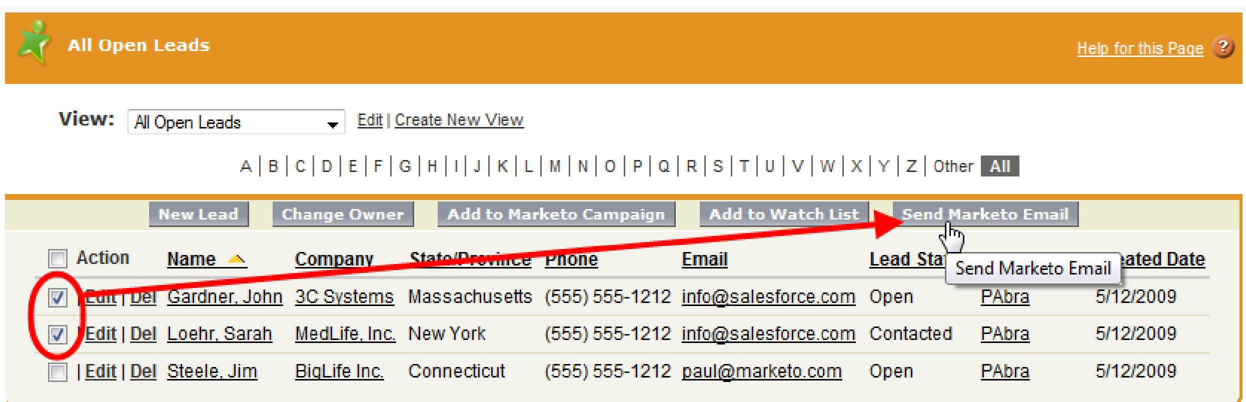
As part of Marketo Sales Insight, you can send personalized, tracked emails provided by your Marketing team from within Salesforce. You can then view the activities on those emails in Sales Insight.

Picking mail recipients

You can pick your email recipients from Salesforce in two ways. First, from a lead or contact detail page, pick the**Send Marketo Email** action from the **Marketo Sales Insight** menu and click **Go**:

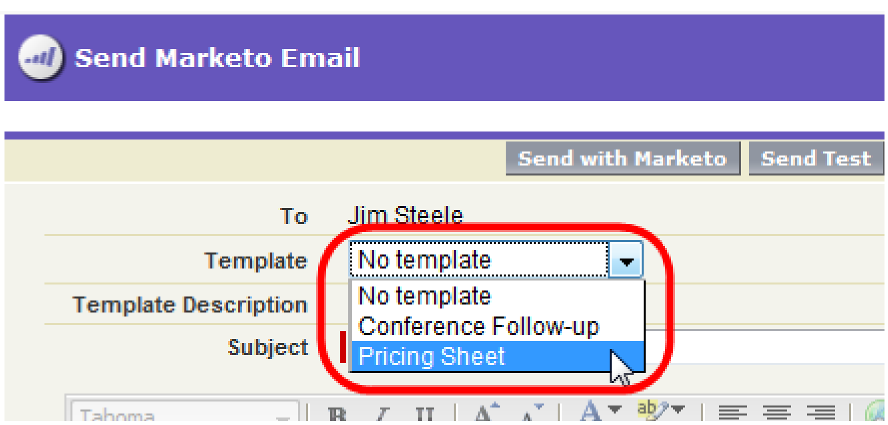


Second, you can select multiple recipients from a contact or lead list, then click the **Send Marketo Email** button:



Sending the email

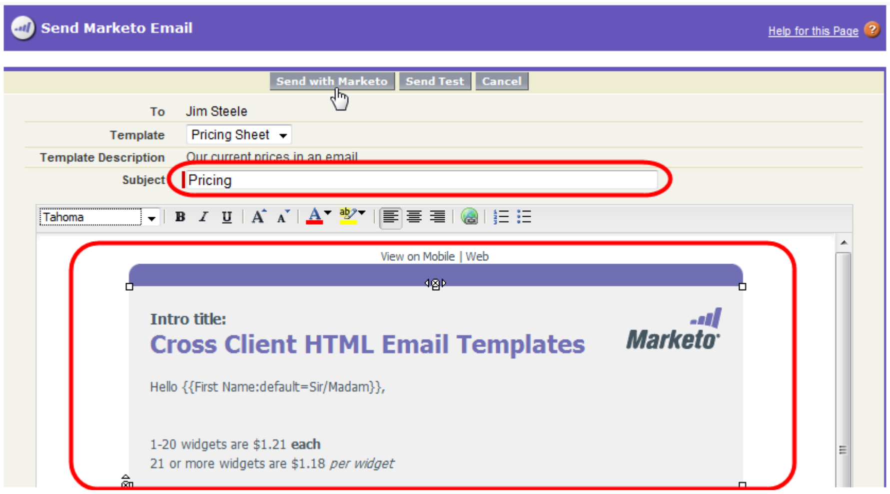
You can make your changes to the blank email or use the **Template** pulldown to pick a template provided to you by your Marketing team:



Feel free to make edits to the email subject or body. However, do not edit the tokens. They look like this in the email body:

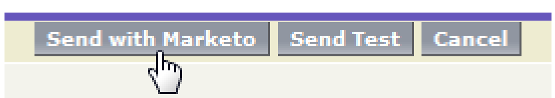
{{First Name:default=Sir/Madam}}

Tokens are automatically swapped out with the recipients' information when the email is sent.



Optionally, send yourself a test email by clicking the **Send Test** button at the top or bottom of the page.

When you're done, click **Send with Marketo**. Marketo will add tracking information to the email then send it to the recipients. This will allow Marketo to let you know when the email is opened or clicked, and will track the recipient so you can find out when they visit the website.



Viewing Email Results

Actions your leads and contacts take on these emails is visible in the **My Email** section of the **Marketo** tab and in the **Email** tab of the lead or contact detail pages.