



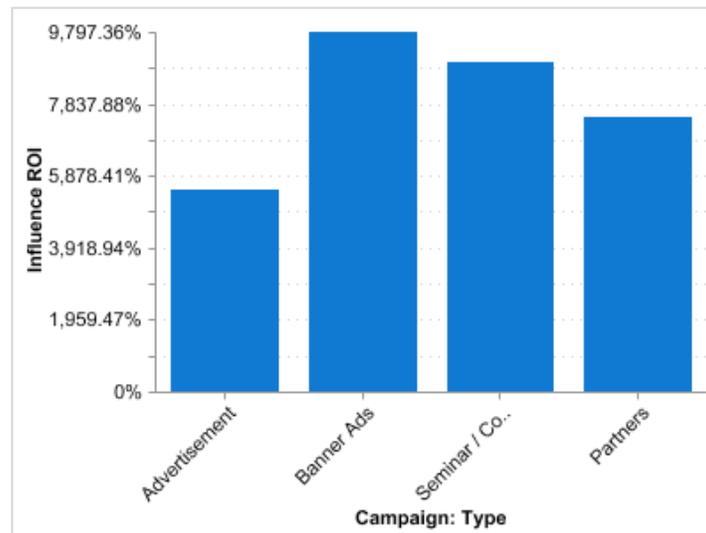
The Top 5 Reports Finance Wants from Marketing

While ROI may not show the complete picture of how marketing campaigns perform it is a good metric to show the CFO which campaigns provide the most “bang for your buck”.

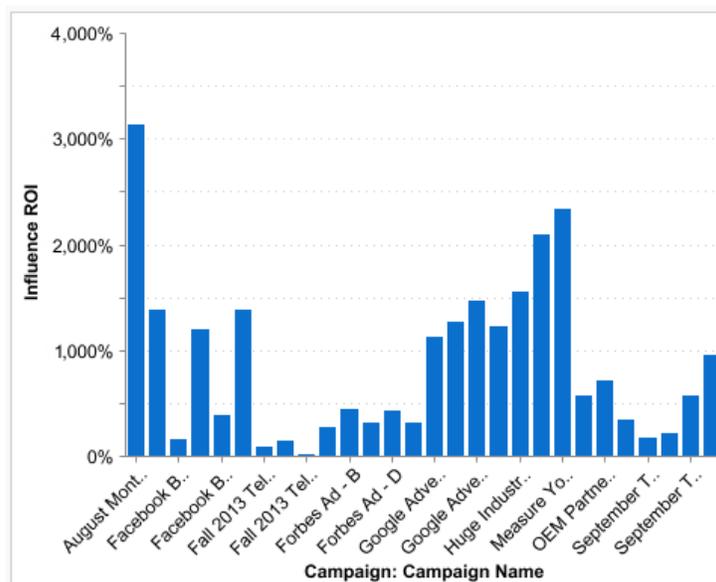
In many companies the only interactions between marketing and finance occur when marketing needs approval to spend money on new programs or technologies. This causes marketing to be viewed as a cost center instead of the revenue center it is. For marketing to take charge of this relationship and prove to the finance department that it does more than just ask for budget and spend money it needs to leverage data in Salesforce to set up these 5 key reports to show finance exactly how marketing is a growth center and provides value.

1. Campaign ROI (Return on Investment)

Influence ROI by Campaign Type



Top Performing Campaign Types by ROI.



Top Performing Campaigns by ROI.

While ROI may not show the complete picture of how marketing campaigns perform it is a good metric to show the CFO which campaigns provide the most “bang for your buck”. This shows the finance department that while some marketing programs are expensive they are still worth it because of the sheer amount of revenue they bring in. A good example of this could be sponsoring large events or conferences like Dreamforce. ROI also shows which lower budget campaigns generate the highest proportional return so while they may not net as much revenue as a conference something like a banner ad could still generate a 10x return, making it worthwhile to try and run multiple types of these campaigns in different places.

2. Influenced Revenue by Campaign

<u>CLOSED/WON</u>	
<u>Campaign: Campaign Name</u>	<u>Sum of Won Revenue</u>
<u>Huge Industry Conference 2</u>	\$7,851,620
<u>Huge Industry Conference</u>	\$6,020,295
<u>August Monthly Newsletter</u>	\$4,673,997
<u>June Monthly Newsletter</u>	\$3,597,178
<u>Facebook Banner Ad - D</u>	\$3,568,303

Top Performing Campaigns by Influenced Revenue

The next metric that your CFO will want to see is which campaigns play a role in influencing revenue. Finance wants to know exactly what the money marketing has spent has generated and campaign influence is the best metric to show this. For example in the above chart you can see that the Huge Industry Conference 2 campaign influenced \$7.85 million and Facebook Banner Ad - D influenced \$3.57 million. What this means is that these two campaigns played a direct role in closing \$11.42 million of revenue for your company. This metric is tracked across every single campaign touch in closed deals and gives both marketing and finance a great picture of which campaigns have the highest impact on revenue growth.

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3. Influenced Pipeline by Campaign

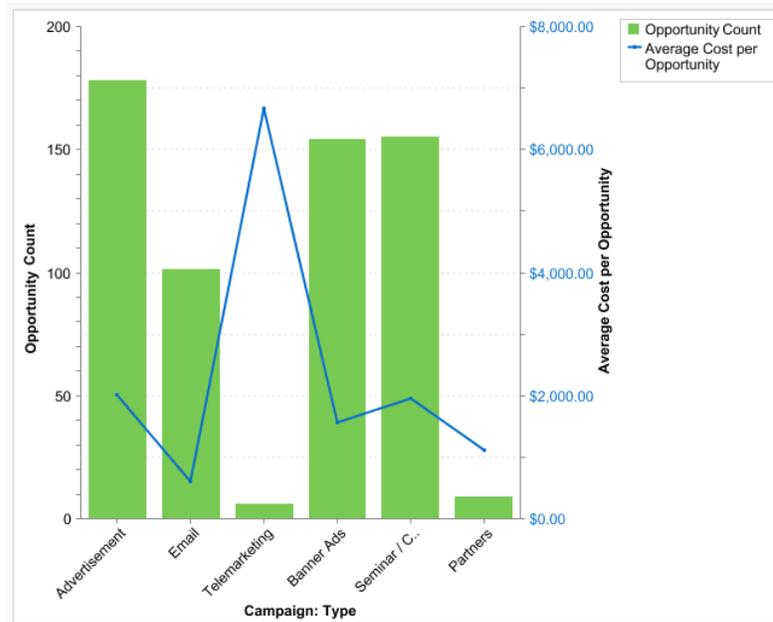
Looking at influenced pipeline shows the CFO exactly how much potential revenue marketing has passed onto sales.

<u>OPEN</u>	
<u>Campaign: Campaign Name</u>	<u>Sum of Pipeline</u>
<u>Wall Street Journal Ad</u>	\$1,766,534
<u>Funnel Fantastic Webinar</u>	\$1,702,552
<u>Huge Industry Conference</u>	\$1,446,378
<u>June Monthly Newsletter</u>	\$1,301,225
<u>Measure Your Metrics Email - D</u>	\$1,173,625

Top Performing Campaigns by Influenced Pipeline

This metric takes a step back from looking at influenced revenue and shows the total amount of potential revenue that has been touched by marketing. In most companies the sales team doesn't win every single opportunity, but for the most part that is out of marketing's hands. So looking at influenced pipeline shows the CFO exactly how much potential revenue marketing has passed onto sales instead of how much revenue sales has been able to close that marketing has played a role in sourcing. Basically this metric along with the chart in the section above show the hypothetical total value of all of marketing efforts if every opportunity was closed and won by sales.

4. Average Cost by Campaign Type per Opportunity

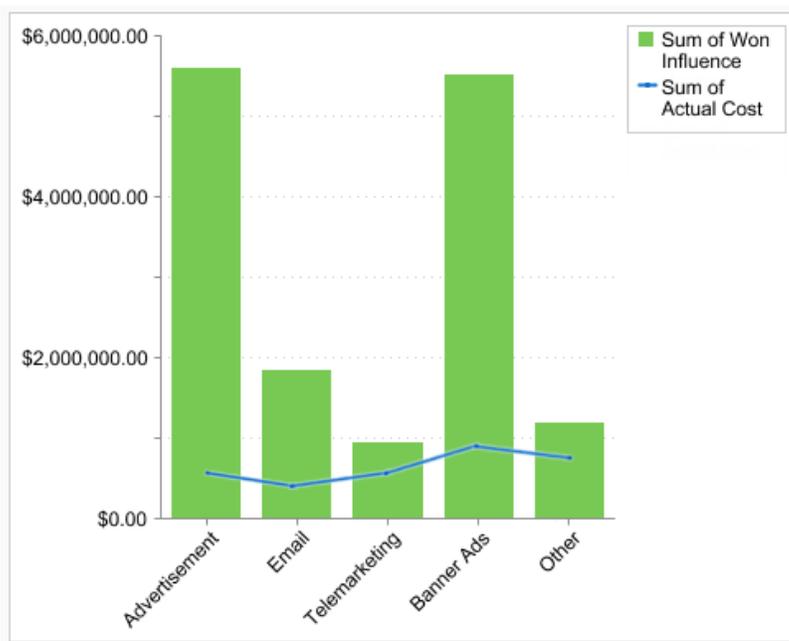


Average Cost per Campaign Type by Opportunities Created from that Campaign Type

This report may look a little complex, but it is very useful for finance departments. The green bars show the number of opportunities created by campaign type and the blue line shows the average marketing cost to generate those opportunities based on the campaign types that generated them (looking at the y-axis on the right). Many companies aren't able to track this accurately in Salesforce because they don't capture the budgeted and actual costs of their campaigns in Salesforce and finance is always interested in seeing exactly what is being spent and the return on that investment. You can set up a combo bar/line chart like this one in a dashboard so you don't have to constantly answer this question of which campaign types provide the most value and can have a real-time chart for the CFO to look at.

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5. Total Influenced Revenue vs. Actual Cost



Marketing Influenced Revenue vs. Actual Campaign Cost

The last report that the CFO wants to see is exactly how much money marketing has brought in vs. how much marketing has spent—looking at the data from the report in section 4 and tying it to revenue. This report can be tracked in Salesforce in real-time for finance as new leads come in from campaigns and new revenue that marketing influenced closes. It paints a great picture for finance to show the importance of marketing's contributions to the company's bottom line and hammers home the idea of marketing being a revenue machine and not a cost center.

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Aligning Finance and Marketing

Every company is different and some of these reports might make more sense than others but the crux of the issue is for marketing and finance to maintain a good relationship finance needs to understand the value that marketing brings to the table. This can only be accomplished by providing hard data inside the company CRM system that shows exactly how much revenue marketing influences, which programs provide the most value, and the total return that is generated from the marketing budget.

About Full Circle Insights

Full Circle Insights delivers marketing and sales performance measurement solutions and lead management technology for driving more revenue. Our cloud-based products provide actionable intelligence to optimize a company's marketing mix and drive more revenue. The company built its products 100% on the Salesforce App Cloud and are compatible with the leading marketing automation solutions.

Founded by former Salesforce executives and implementation veterans, CRM product managers, and marketing automation specialists, the Full Circle Insights industry pioneers and thought leaders know what it takes to run a successful marketing organization. The team is passionate about giving data-driven marketers the answers they need to uncover a marketing campaign's impact to the business, plan with confidence, and grow revenue.

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