Turbo Charge Your Analytics in Salesforce

Full Circle Insights
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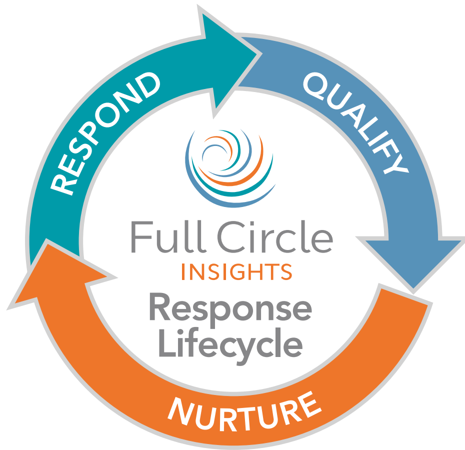
Full Circle Insights Marketing Performance Management is a native Salesforce application that provides users with highly configurable, weighted Campaign Attribution models, integrated sales and marketing funnels, and a complete response lifecycle management solution. With Full Circle Insights, marketers can finally understand campaign performance and therefore, marketing's contribution to revenue. In this document, we'll explore how marketers can answer key questions to drive revenue when using Full Circle Insights.

Campaign Performance

Everyone who plays a role in demand generation across sales and marketing wants to know exactly which programs drive opportunity creation and revenue. Whether it is a call down campaign from telesales or an event planned by marketing, it is crucial for companies to understand which campaigns perform well under different circumstances so they can optimize the marketing mix and maximize revenue. The bottom line is, you need to know what works to position your company for success.



salesforce (standalone)

STANDARD

Recording campaign data in Salesforce is fundamental in measuring campaign performance. This enables data integrity across the organization and ensures that marketing performance data incorporates sales team figures that line up with revenue. Salesforce associates the Last Touch Campaign to the Opportunity, and each Campaign needs to be vetted to ensure that it was a true response. (e.g., email bounces that cause revenue credit to be incorrectly allocated to the email campaign). Full Circle Insights extends Salesforce to support these and other scenarios.

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COMPLETE VISIBILITY

The Full Circle Insights solution sets the Campaign that drove rep engagement (the tipping point Campaign) as the primary Campaign for ROI calculations. Full Circle also captures first and last touch (but only for actual campaign responses—forget that bounced email from one of your outbound campaigns) and provides weighted influence models as well. Our Marketing Performance Management solution supports full Campaign metrics for all Opportunities, and can be configured to require that Opportunities are created from Leads and Contacts and that at least one Campaign is present for every Opportunity. Alternatively, we can simply clear off the faulty data when Campaign credit should not be given.

Did my campaign influence revenue?

salesforce (standalone)

STANDARD

Salesforce comes with an influence model straight out-of-the-box. From the influence model, Salesforce's campaign influence reports can provide baseline insights into campaign performance. However, as a caveat, this model attributes 100% of the sale to each and every Campaign within the global influence criteria, without de-duplication (so a deal's revenue gets counted multiple times). Many organizations want to calculate revenue impact (by campaign) in a more flexible manner and want the total revenue attributed to match the total revenue generated.

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COMPLETE VISIBILITY

Full Circle Insights provides a powerful weighted campaign attribution framework that gives marketers visibility into all the touches that contribute to Opportunity creation and close. Full Circle Insights leverages the Opportunity Amount and distributes it across all Campaign Members that influenced the deal based on a flexible, easy to use weighting system. Using this mechanism, marketers can slice and dice influenced deals by Campaign, Opportunity Type, Account segments, and any other attribute on the Campaign, Opportunity, or Contact and Account record.

Top Performing Campaigns By Influenced Revenue

Campaign Name	Sum of Influence Revenue
Security Campaign - 2012 - Secure Data Whitepaper	$375,033
Core Campaigns - 2012 - Download - 30 Day Trial B	$267,440
Sales Campaign - 2012 - Inbound Call	$144,684
Core Campaigns - 2012 - Download - 30 day Trial	$140,190
Security Campaign - 2012 - Banner Ads - TechTarget	$111,364

What were the quality of the responses?

salesforce (standalone)

STANDARD

Today Salesforce gives marketers visibility into the current Lead status and the related disqualified reason, which is essential to understanding lead quality. If using standalone Salesforce, be diligent about enforcing the data input into this field by sales reps. Note that data can be lost when the Lead is re-opened. Because the disqualified reason is a static field on the Lead record, it is difficult for marketers to understand what specific Campaign responses have been disqualified and why. Additionally, marketers lose this data altogether on the Contact record since it doesn't have a status to capture engagement.

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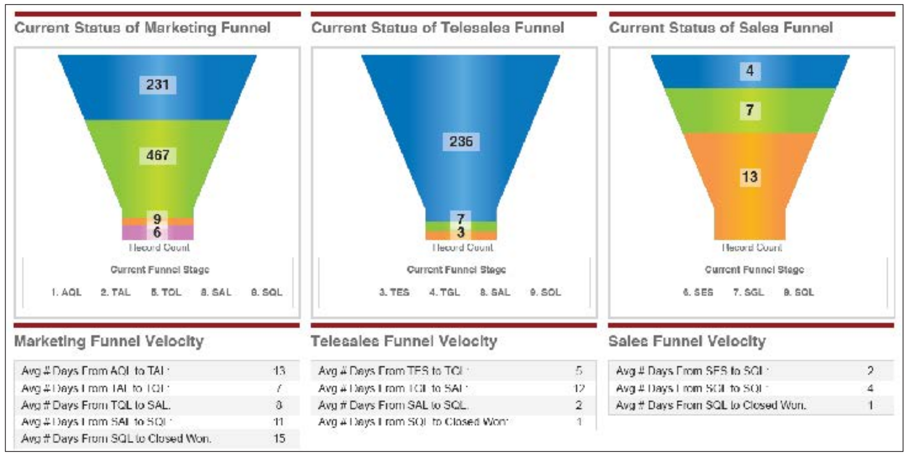
Using a disqualified reason on both Leads and Contacts, Full Circle Insights captures that data on the Campaign Member so marketers can identify why a specific Campaign response was disqualified. This functionality supports a feedback loop between sales and marketing that enables the refinement of qualification criteria and scoring over time.

Campaign Name: Core Campaigns - 2012 - Breakfast RoundTables **(5 records)**
Disqualified Reason: Student **(2 records)**
Disqualified Reason: Not Our Demographic **(1 record)**
Disqualified Reason: Competitor **(1 record)**
Disqualified Reason: No Budget **(1 record)**
Campaign Name: Core Campaigns - 2012 - Download - 30 day Trial **(5 records)**
Disqualified Reason: Student **(2 records)**
Disqualified Reason: Competitor **(1 record)**

Funnel Metrics



Sales and marketing funnels are great tools to help align the two parts of the organization and streamline the entire demand generation lifecycle. Tracking comprehensive funnel metrics is critical for today's demand generation organizations because this data provides valuable information that can help you understand the health of your business, find and fix any bottlenecks in the marketing to sales hand-off, and expose where you might make changes to maximize revenue. Key funnel metrics include volume, conversion rates, and velocity.

What is the volume of my demand generation funnel?

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STANDARD

With Salesforce and customization, you are able to designate your leads with the funnel stages attained. Funnel stages like Marketing Qualified Lead (MQL) or Sales Accepted Lead (SAL) are typically captured on the related Lead and Contact records. Note: these stage attainments can be unintentionally overwritten as an individual moves through the demand generation lifecycle multiple times. Overwriting this historical information results in inaccurate data and the inability to understand what specific Campaign prompted the Lead or Contact to move through the funnel stages at what time.

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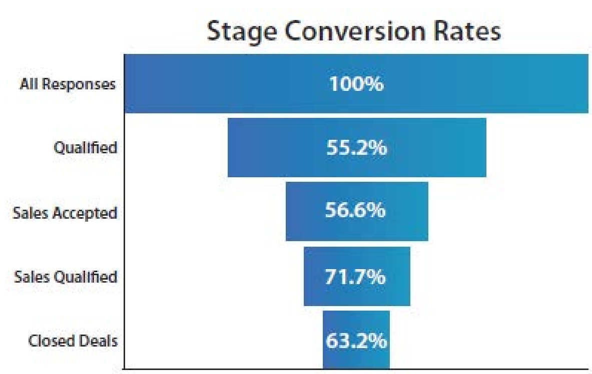
Marketers can use Full Circle Response Management to view funnel stage volume rates, or they can generate custom funnels using standard Salesforce reports across both Leads and Contacts. Easily slice and dice funnels by customer segments, campaign, timeframe, or any dimension that is critical to your organization.



What are the conversion rates of my demand generation funnel?

(standalone)

STANDARD

With regular and frequent exports of your data as snapshots in time, you should be able to obtain general conversion rate insights to identify weak spots in your funnel. Note: extending Salesforce with custom code or a solution such as Full Circle Response Management enables you to track the funnel based on every interaction to get a holistic view of the various funnels (marketing, telesales, sales, etc.) across Leads and Contacts over various time periods.

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COMPLETE VISIBILITY

Full Circle Response Management provides comprehensive conversion rates across all of your demand generation channels. You can segment by campaign, department, geographical location, or any other criterion to find and fix any bottlenecks in your demand generation processes.

	MQR/QT	SAR	SQR	SQR Won	MQR - SAR	SAR - SQR	SQR - Won
Campaign Sourced By: Marketing **(266 records)**	142	34	24	19	23.94%	70.59%	79.17%
Campaign Sourced By: Sales **(255 records)**	180	45	43	35	25.00%	95.56%	81.40%
Campaign Sourced By: Telemarketing **(24 records)**	16	13	11	7	81.25%	84.62%	63.64%

What is the velocity of my demand generation funnel?

(standalone)

STANDARD

Velocity metrics show how long it takes a response to progress from one stage in the funnel to the next. As mentioned above, snapshotting through saving Salesforce data exports can provide a baseline of trend insights. Because Salesforce overwrites the funnel stage information on the related Lead or Contact record, be sure to add a solution that extends Salesforce to capture the historical data on the Lead or Contact in an automated fashion.

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Since progression in each stage of the funnel is date stamped and synchronized to each individual response, marketers will find it easy to slice and dice velocity metrics in many different ways such as by campaign, job function, industry, target accounts, etc.

Funnel Velocity

Avg # Days From MQR to SAR:	20
Avg # Days From SAR to SQR:	10
Avg # Days From SQR to Closed Won:	1

Response Management

Setting up a complete response management lifecycle properly is the backbone for keeping sales and marketing on the same page and generating clean data for your marketing campaign performance reports. Full Circle Response Management bridges the information gap between Leads and Contacts, tracks every historical response to your marketing and sales programs, and provides your entire organization clarity into exactly how responses are brought into your system and how they are acted upon.

Is sales following up on Leads that have re-engaged?

salesforce (standalone)

STANDARD

In standard Salesforce you can manually create workflows to re-open the status of the Lead or Contact. This is important to ensure re-engagement. If you would like to auto-trigger assignment rules to re-assign the record, look for an extension to Salesforce.

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With Full Circle Response Management, you get a completely integrated lifecycle across Leads and Contacts and can track them through the funnel every time they re-engage. When Leads do engage again, standard Salesforce assignment rules and notifications will be triggered to ensure they get to the right person.

Are we maximizing our Contacts database?

salesforce (standalone)

STANDARD

In Salesforce, Contacts do not have a status value associated with them so it is difficult to track sales engagement when an existing Contact responds to a marketing effort. Since organizations often miss out on capturing when Contacts re-engage, they are often excluded from traditional funnel metrics. Salesforce applications such as Full Circle Response Management can surface those exclusions for more accurate funnel metrics.

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COMPLETE VISIBILITY

Full Circle Response Management provides the same customizable status functionality that Leads have in Salesforce to the Contact record. This allows marketers to not only notify sales when a Contact engages with the organization but also track the outcome once sales follows up.

	MQR/QT	SAR	SQR	SQR Won	Opportunity Amount
Lead **(1,379 records)**	601	151	124	98	$9,269,004.00
Contact **(117 records)**	82	34	23	4	$2,362,444.00
	683	**185**	**147**	**102**	**$11,631,448.00**

How many responses did sales engage with over time?

salesforce (standalone)

STANDARD

Performance by sales rep is a crucial metric. Salesforce users know which Leads and Contacts a rep owns at any given time. But, be sure to take snapshots of rep engagements to capture engagement over time. The image below shows Leads in the system by owner. This data reflects the Leads they own today, but not how many they have processed in the past that have been re-assigned. With Full Circle Response Management, you can see the outcomes of each engagement and see how many require follow-up.

Leads By Owner

Lead Owner	Record Count
Roan Bear	22
Sally Sales Person	13
Total	35

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With Full Circle Response Management marketers can see how many responses were sent to sales and the outcome of every follow-up (or lack thereof). Additionally, management can see response aging to determine whether sales reps are meeting their Service Level Agreement (SLA). The image below shows actionable Leads and Contacts that were assigned to reps for follow-up, regardless of the current Owner.

Responses Assigned For Follow Up (Volume)

First Owner Assigned	Record Count
Bonnie Crater	1
Jay Jennison	14
Josh Rosenberg	1
Roan Bear	15
Sally Sales Person	34
Total	65

Shows actionable leads and contacts that were assigned to reps for follow-up, regardless of current owner.

Are sales meeting their Service Level Agreement (SLA)?

salesforce (standalone)

STANDARD

With standalone Salesforce, marketers can get a view of the Leads currently owned by sales by adding custom code to track status age. Note: this visibility doesn't relate to the follow-up on a specific campaign response because Leads can engage with different campaigns over time. Furthermore, the sales SLA attainment on Contacts with responses is not visible at all. In organizations that pass Opportunities, management would need further customization to see Opportunity stage progression.

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COMPLETE VISIBILITY

Because Full Circle Response Management tracks not only status age but also funnel stage, marketers can report on SLAs even if they differ for each stage of the funnel. You can report on SLA attainment across Leads and Contacts as well as Opportunity stages that relate to funnel stages.

Neglected Responses By Owner

Lead/Contact Owner	Record Count
Sally Sales Person	181
Roan Bear	127
Jay Jennison	85
Bonnie Crater	52
Josh Rosenberg	25

What was the outcome of the responses generated by Campaign? Did sales follow up?

salesforce (standalone)

STANDARD

Use Salesforce to report on Lead status at any point. Note: this omits a Lead's historical status from when the response came in initially. Furthermore, Contact records do not have status values associated with them so they are omitted from any status reporting.

Leads by Lead Status

Lead Status	Record Count
Open - Not Contacted	110
Attempting Contact	1
Working	2
Nurture/Marketing	1
Disqualified	2
Total	116

** Shows all leads that have responded to the campaign and the CURRENT lead status, Will not display converted leads.*

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COMPLETE VISIBILITY

Full Circle Insights tracks all responses across both Leads and Contacts giving marketers visibility into how many responses were truly actionable by a specific campaign.

Responses by Status

Response Status	Record Count
Open - Not Contacted	1
Disqualified	3
Qualified - New Opportunity	4
Resolved - Already Engaged	9
Resolved - No Action Required	14
Resolved - Opportunity Won	3
Total	34

**Shows all leads & contacts that have responded to the campaign and the resulting status of that engagement.*

About Full Circle Insights

Full Circle Insights delivers marketing measurement solutions that provide actionable intelligence with funnel analytics and attribution data to optimize the marketing mix and drive more revenue. Our cloud-based products are built 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, Full Circle Insights comprises industry pioneers and thought leaders who know what it takes to run a successful marketing organization. The team is passionate about giving marketers the answers they need to uncover a marketing campaign's impact to the business, plan with confidence, and grow revenue. Learn more at www.fullcircleinsights.com.

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