

Top 5 Reports Your CEO Wants from Marketing

Show your CEO how marketing impacts pipeline and revenue.

The CEO is primarily interested in one thing from marketing: how much has marketing contributed to revenue this month, quarter, or year?

Since the CEO is responsible for making sure that the company is meeting and exceeding the expectations of shareholders, he or she wants to understand:

- Exactly how the marketing department is contributing to sales
- How marketing and sales are working together
- How the two departments plan to streamline their efforts
- How they plan to generate more revenue and overachieve on company goals

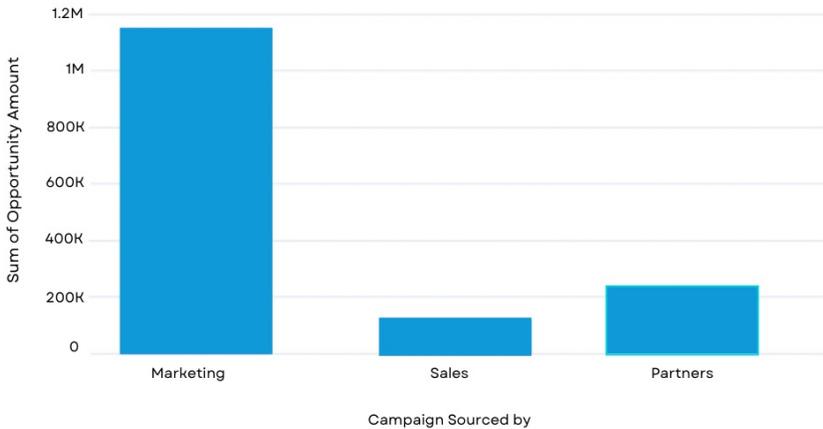
The best way for any marketing department to provide this kind of data for the CEO is to track and measure marketing campaigns in the company's CRM system such as Salesforce. Sales already tracks deals and forecast information in the CRM system and most companies have regular reviews of forecasts and results using CRM data and reporting.

When both sales and marketing track and measure their efforts in Salesforce, the CEO and the entire executive team are equipped with one source of truth for all critical metrics across sales, marketing, and any other revenue development channel.

So what reports from the CRM system does a typical CEO want to see from marketing?

1. Revenue Sourced by Department

Image 1: Sourced revenue by marketing, sales, and partner channels.



When both sales and marketing track and measure their efforts in Salesforce, the CEO and the entire executive team are equipped with one source of truth for all critical metrics.

One of the first things CEOs want to know is how much marketing is impacting the business versus other ways that business is being developed. Of course, marketing doesn't close deals but it does tee up opportunities for sales. Plus marketing also influences deals through ongoing campaigns throughout the sales cycle.

Similarly, while sales close the deals, sales may also source or influence deals through sales programs such as a call-down campaign or a special customer engagement.

This report (Image 1) shows the attribution each department played in influencing revenue for a fiscal year and is a great summary to show the CEO how each department is performing based on a revenue measurement.

Reports like this are customizable and can be produced for any time period (e.g. month, quarter, or year) and it's often useful to compare periods such as this year vs. last year. In addition, these charts are all clickable so you can drill down into this report and see which campaign types or even specific campaigns have the biggest impacts. CEOs often love to see this kind of information.

2. Funnel Velocity

Image 2: Lead velocity by department.

Campaign Sourced By ↑ ▼	Average QL to SAO	Average SAO to SQO	Average SQO to Closed/Won
Marketing	68	5	6
Sales	21	12	30
Channel	34	20	22
Customer Success	20	15	14

A good CEO knows that if they can shorten the sales cycle by half, they can double their revenue in the same time period. Therefore examining sales velocity is a really useful metric.

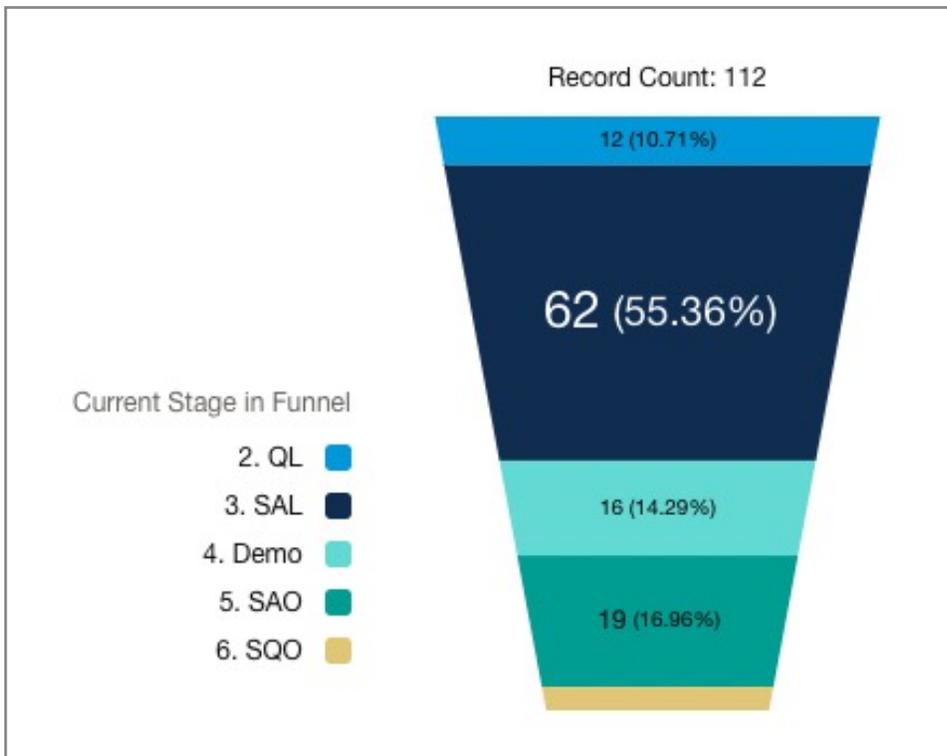
Velocity shows how quickly responses pass from stage to stage. Looking into velocity metrics can assist CEOs or sales leaders in asking their sales team to look through their contacts to see if there are any short-term deals to close. Other useful information in this report focuses on potential bottlenecks in the lead management process.

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3. Funnel Volume

Image 3: Current active funnel including volume and conversion metrics.



This is a great metric to track in conjunction with velocity and conversion rate to put everything in context.

The other key funnel metric for a CEO to look at is the current active funnel. This shows the sheer number of responses that are generated across every department and is a great snapshot of the health of your pipeline.

Generally speaking, the more responses marketing can generate at the top of the funnel, the more opportunities sales can create—leading to more revenue. This is a great metric to track in conjunction with velocity and conversion rates to put everything in context. Furthermore drilling down into specific market segments, campaign types, and even individual responses can get you answers to even the most detailed questions the CEO may ask.

4. Total Attribution Influenced by Department

Image 4: Influenced Pipeline by Marketing vs. other departments.

Campaign: Campaign Sourced By ↑ ▾	Sum of Open Pipeline - Model1	Record Count
Marketing	\$125,499,505	6,378
Sales	\$70,968,793	1,335
Channel	\$40,475,619	516
Customer Success	\$11,183,000	211

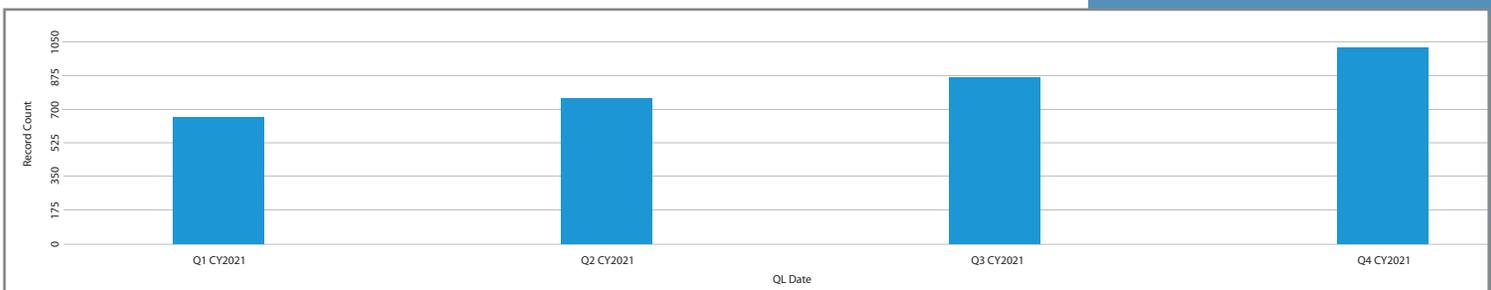
This chart shows how much pipeline or potential revenue marketing has sourced versus the other demand generation channels. Since data-driven CEOs want to understand investments in pipeline development, it's important for marketing to show its role in generating potential revenue for sales. This chart shows that marketing is sourcing more than half the pipeline for sales.

5. Marketing-to-Sales Handoff & Funnel Conversion Rates

Image 5: 2021 MQLs.

QL Date ↑ ▾	Record Count
Q1 CY2021	640
Q2 CY2021	753
Q3 CY2021	860
Q4 CY2021	970
Total	3,223

Image 6: 2021 MQLs.



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Image 7: 2021 SALs.

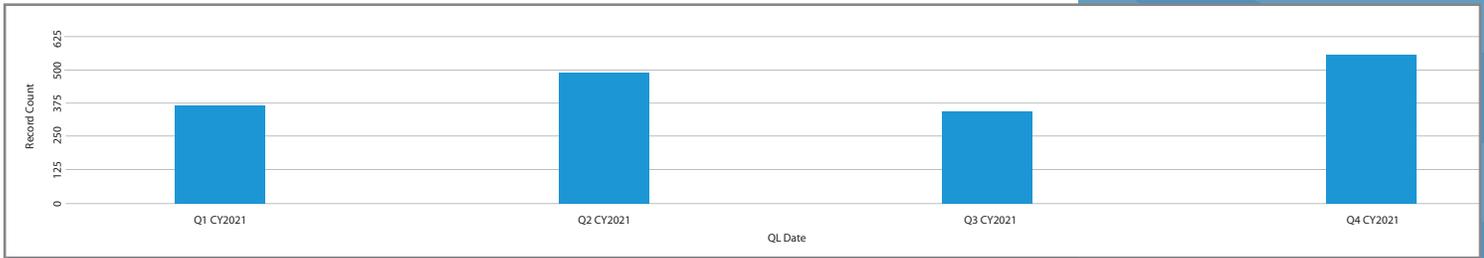
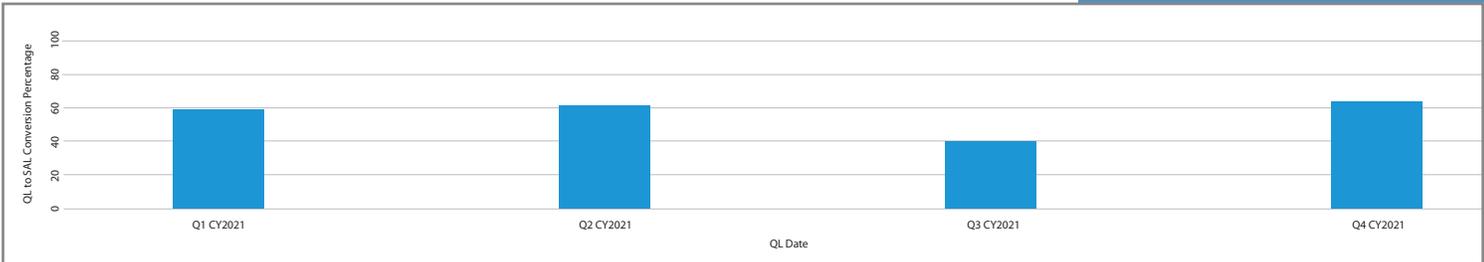


Image 8: MQL to SAL conversion rates by quarter.



Leveraging Salesforce to show the volume and conversion rate across the marketing-to-sales handoff provides the CEO a complete picture of how smoothly the entire demand generation organization is functioning. In images 5 and 6 you can see that marketing is consistently generating more leads quarter over quarter in Q1 and Q2 and they are converting to SALs (Image 7) at a pretty consistent rate as well in the first half of the year. Then at the beginning of Q3, we see a steady increase in MQLs but a nosedive in SALs (Image 7). As a result, the conversion rate from the marketing to sales handoff drops (Image 8).

Why did the conversion rate in Q3 change? Maybe sales didn't hit its SLAs? Or maybe marketing's leads were worse quality and more MQLs than usual were disqualified? Seeing this data not only lets you prevent drops in your demand generation but also lets you squeeze more revenue out of your existing budget if you can find bottlenecks in the process.

Aligning the CEO and Marketing

At the end of the day what the CEO cares about the most is how can the company generate more revenue, more quickly.

Being able to show the CEO all the different funnel metrics across sales, marketing, and telesales to help streamline processes and generate more

revenue without increasing the budget is invaluable to strategic planning and growth moving forward.

Additionally, being able to show exactly how much revenue and total pipeline marketing influences, and the relationship between marketing spend and marketing ROI proves to the CEO the importance of marketing's role in helping the company succeed.

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 Platform and is 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 on the business, plan with confidence, and grow revenue. Learn more at www.fullcircleinsights.com.

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