Marketo - Interesting Moments

Interesting moments is a useful feature which provides insight about a Lead or Contact to the Sales team. Currently we are creating Interesting Moments for the following activities in Marketo Sales Insight. They are categorized into Email, Web & Milestone

- Click link on emails Email
- Web page visits Web
- Form fill outs Web
- Social & display ads Web
- Clicked 5 emails or Visited 5 web pages in past 60 days Milestone

Please Note: Only Salesforce users who are provisioned with MSI licenses can view the Interesting Moments data, others cannot.

Email:

A Sales Person can see any activity related to a Lead or Contact under the Interesting Moment tab. The interesting moment for email provides information about the email subject line, the URL (that has been clicked) and date/time of the activity.

III Insights Interesting Moments Web Activity Score Email	└─ │ +298	.
Interesting Moment	Date	Subscrik
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:37 PM	2
Web: Filled out "Contact Us form" on this page: "NA-SPDR-Preference-centerTesting_NA-SPDR- PreferenceTesting"	6/22/2021 6:37 PM	
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	P
Web: void mis web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	P
Email: Clicked Link in Email: Subject Line: "test" Link: "https://uat- www.ds.ssga.com/uk/en_gb/institutional/ic"	6/17/2021 6:28 PM	2
Web: Vijay M visited 5 high value webpages	6/17/2021 6:28 PM	2
Email: Vijay M Opened Test email	6/17/2021 6:27 PM	P
Milestone: Vijay M Attended the webinar	6/15/2021 4:39 PM	2
Email: Clicked Link in Email: Subject Line: "Trigger #1 (podcast)" Link: "https://www.ssga.com/resources/universal/index.html?link=autoclick&0001"	3/29/2021 2:57 PM	

Web:

Web related Interesting Moments provide information about lead/contacts include web visits, form fills out, and web visit though sponsored emails or social ads.

• Web visits:

Whenever a cookied lead or a contact visits our web page, an activity gets recorded in the activity log of Marketo's record. and an interesting moment on Marketo Sales Insight section as shown below. This web visit interesting moment will include the URL of the web page and date/time of the visit.

Insights Interesting Moments Web Activity Score Email	→ +298	***
Interesting Moment	Date	Subscrik
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:37 PM	
Web: Filled "Contact Us form" on this page: "NA-SPDR-Preference-centerTesting_NA-SPDR- Preference-centerTesting"	6/22/2021 6:37 PM	
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	1
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	2
Email: Clicked Link in Email: Subject Line: "test" Link: "https://uat- www.ds.ssga.com/uk/en_gb/institutional/ic"	6/17/2021 6:28 PM	
Web: Vijay M visited 5 high value webpages	6/17/2021 6:28 PM	
Email: Vijay M Opened Test email	6/17/2021 6:27 PM	2
Milestone: Vijay M Attended the webinar	6/15/2021 4:39 PM	2
Email: Clicked Link in Email: Subject Line: "Trigger #1 (podcast)" Link: "https://www.ssga.com/resources/universal/index.html?link=autoclick&0001"	3/29/2021 2:57 PM	1

• Form fill out:

This Interesting Moment outlines form fill out activity including the form name and web page which hosts the form along with date and time stamp of the activity.

III Insights Interesting Moments Web Activity Score Email	+298	888 888
Interesting Manent	Date	Subscrik
Web: view this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:37 PM	2
Web: Filled out "Contact Us form" on this page: "NA-SPDR-Preference-centerTesting_NA-SPDR- PreferenceTesting"	6/22/2021 6:37 PM	
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• Social and Display Ads:

Web visits captured through Social and Display ads are created as an interesting moment as well with the following description.

Interesting Moment	Date	Subscribe
Web: Visited this web page through Social Ad: "www.ssga.com/us/en/institutional/etfs/insights/etf- market-outlook/pursue-total-return"	10/6/2020 11:32 am	2

Milestone:

A milestone alert is created when a person visits web pages/clicks emails more than 5 times over past 60 days.

Insights Interesting Moments Web Activity Score Email	+298	*** 888
Interesting Moment	Date	Subscrik
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:37 PM	2
Web: Filled out "Contact Us form" on this page: "NA-SPDR-Preference-centerTesting_NA-SPDR- PreferenceTesting"	6/22/2021 6:37 PM	
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	2
Web: visited this web page: "NA-SPDR-Preference-centerTesting_NA-SPDR-PreferenceTesting"	6/22/2021 6:36 PM	2
Email: Clicked Link in Email: Subject Line: "test" Link: "https://uat- www.ds.ssga.com/uk/en_gb/institutional/ic"	6/17/2021 6:28 PM	
Web: Vijay M visited 5 high value webpages	6/17/2021 6:28 PM	2
Email: V M Opened Test email	6/17/2021 6:27 PM	2
Milestone: Vijay M Attended the webinar	6/15/2021 4:39 PM	3
Email: Clicked Link in Email: Subject Line: "Trigger #1 (podcast)" Link: "https://www.ssga.com/resources/universal/index.html?link=autoclick&0001"	3/29/2021 2:57 PM	2

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Creating an Interesting Moment

Here are the steps to create custom Interesting Moments in Marketo. You can use this when you want to highlight if a specific activity has been undertaken e.g. clicked on a particular link or registered for a particular event.

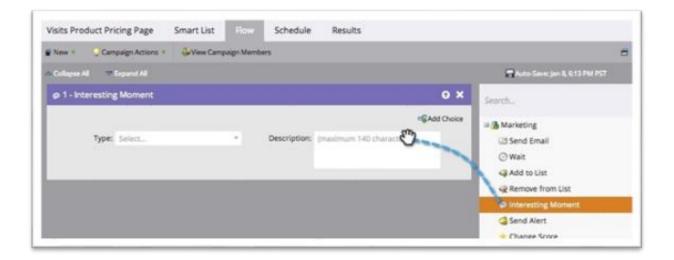
1. Click on the Marketo icon on top left and click on Marketing Activities



2. Once you have identified a smart campaign/activity that your sales team would find interesting. Click on the Smart List tab (on right)

Visits Product Pricing Page	Smart List	Flow	Schedule	Results		
New Campaign Actions	🔂 View Campa	ign Member	rs			
🦻 Use ALL filters 🔹 🔰 📥 Colla	pse All 🛛 🗢 Expan	nd All				
🖉 Visits Web Page						0 ×
						Add Constraint *
Web Page: is		* Produ	ct Pricing Page		0 -	2
	_		_	_	_	

3. Go to the flow tab ^{Flow}, and drag the Interesting **Moments flow** step into the flow canvas.



4. Select the type of Interesting Moment (Email, Milestone, or Web). Make sure that the type is aligned to the trigger you have selected in the Smart List.

€ 1 - Interesting	g Moment				θ×
					SAdd Choice
Type:	Select	-	Description: (m	naximum 140 characters)	
	Email				
	Milestone				
-	Web				
	(m)				

Note: Milestone is a customized field, where you can add whatever interesting moments you would like to add

5. Enter the text you want your sales team to see in the **Description** field.

Ø 1 - Interesting Moment			0 × 0
Type: Web	*	Description:	Visited the pricing page.

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Adding Tokens to Description

You can also add tokens in the descriptions field to provide your sales team with more specific information, like the subject line of the email that the lead opened, or who it was sent by. You can use tokens which are available in the Tokens for Interesting Moments glossary.

Find out more about Tokens available in Marketo.

Based on the trigger you selected, simply add the token in the description area.

	Moment			ο×
				🕞 Add Choice
Туре:	Milestone	¥	Description:	{{lead.First Name}} {{lead.Last Name}} attended "Event Name"

How does an Interesting Moment look like in Marketo?

To view the interesting moments in Marketo you can go to the lead's activity log. Click here to read more about activity log.

-	Custom	Info Company Ir	nfo Opportunity Info SFDC Standard Fields SFDC Custom Fields	8
Printers	Vone V			
D×	Cate/Time (GMT)	Activity Type	Detail	Campaign Name
4325661	17 Oct 2017 12:59	Send Email	EMEA_Program_DemoSPDREvent_September2017.EMEA_Email_invitationEmail_DemoSPDREvent_October2017	EMEA Program (
4323865	17 Oct 2017 11:17	Add to SFDC Campa	2017 - SPDR - DM - Internal Marketo Demo - Event Registration - UK	
Date: 11 C	0ct 2017 (20 Items)			
4142535	11 Oct 2017 16:55	Interesting Moment	Milestone: Filed Out Form:	Ells out Form

How does the Interesting Moment look in Salesforce?

To view the interesting moments in Salesforce you can go to Marketo Sales Insight which can be found on the Lead and Contact tabs on Salesforce. The Last Interesting Moment will also be included on the dashboard.

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