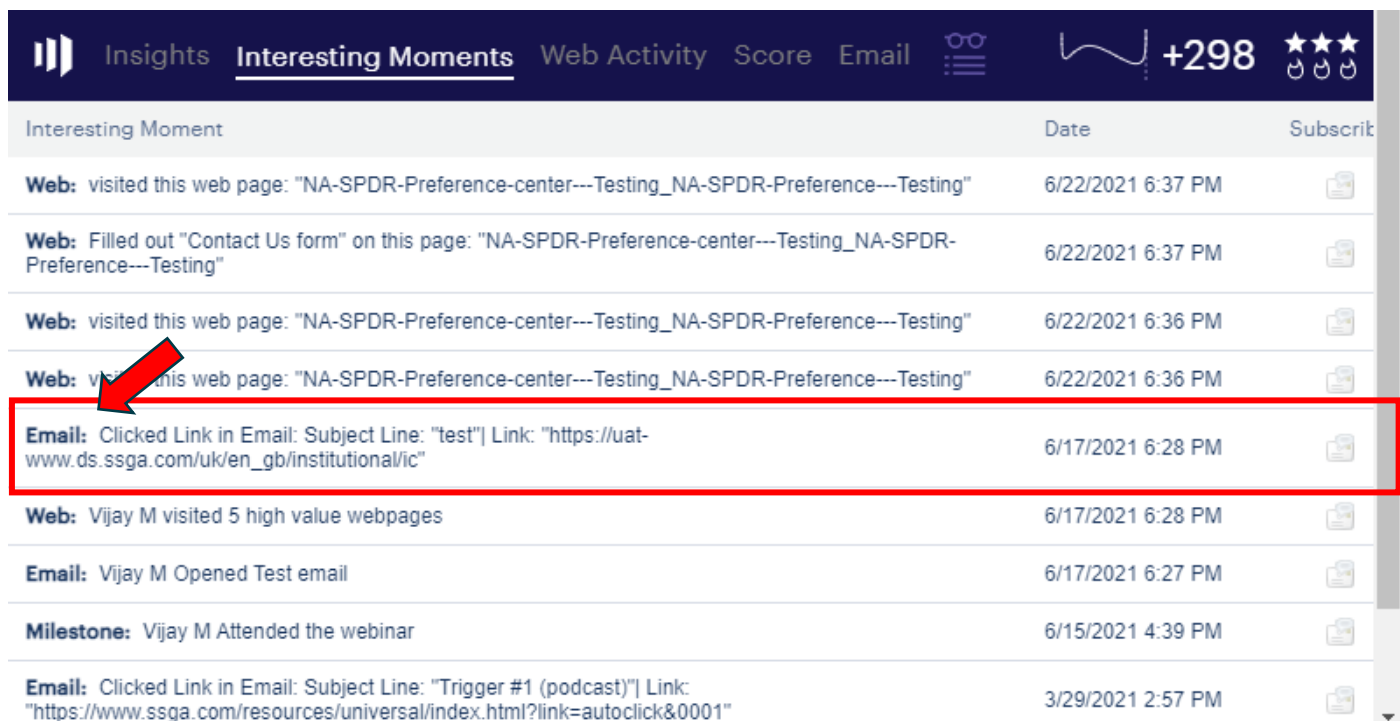# Marketo - Interesting Moments

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.

**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.

- **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.

- **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 | |

**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 ★★★ |
|---|---|---|

| Interesting Moment | Date | Subscrib |
|---|---|---|
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | 6/22/2021 6:37 PM | |
| **Web:** Filled out "Contact Us form" on this page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | 6/22/2021 6:37 PM | |
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | 6/22/2021 6:36 PM | |
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | 6/22/2021 6:36 PM | |
| **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:** ____ M Opened Test email | 6/17/2021 6:27 PM | |
| **Milestone:** Vijay M Attended the webinar | 6/15/2021 4:39 PM | |
| **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 | |

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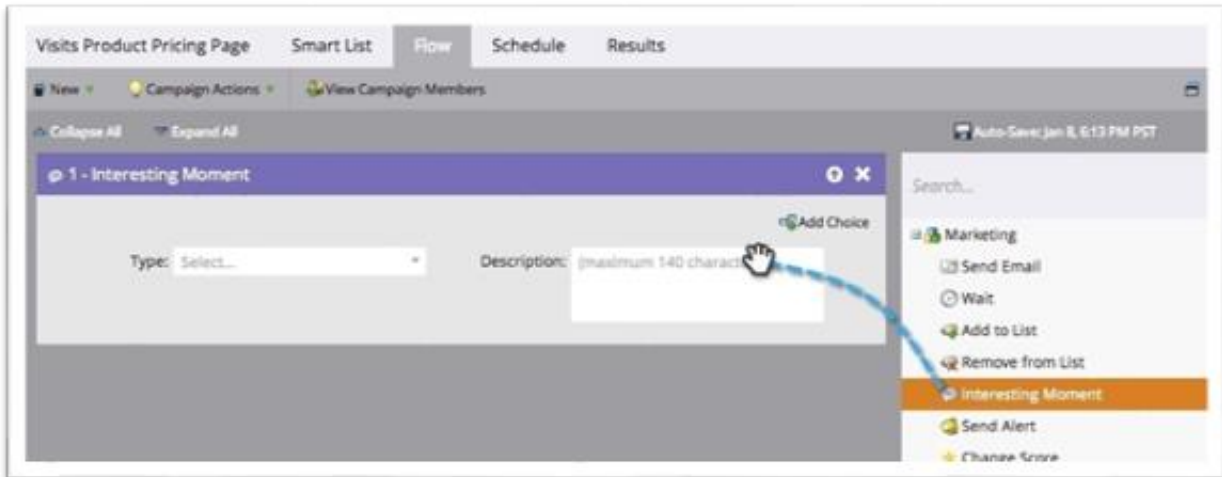
1. Click on the **Marketo** icon on top left and click on **Marketing Activities**



2.  Once you have identified a smart campaign/activity that your sales team would find interesting. Click on the **Smart List tab** (on right)
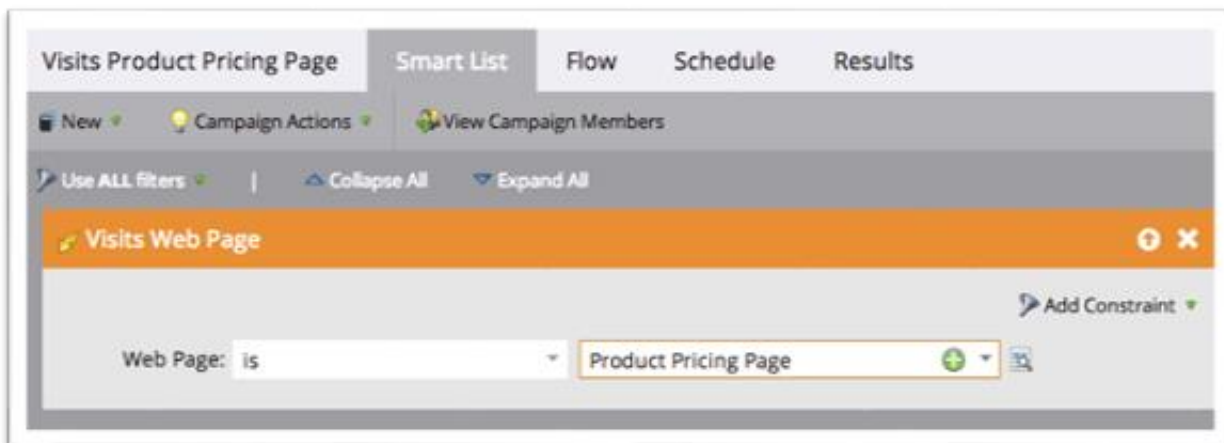
3. Go to the **flow tab** Flow , and drag the Interesting **Moments flow** step into the flow canvas.



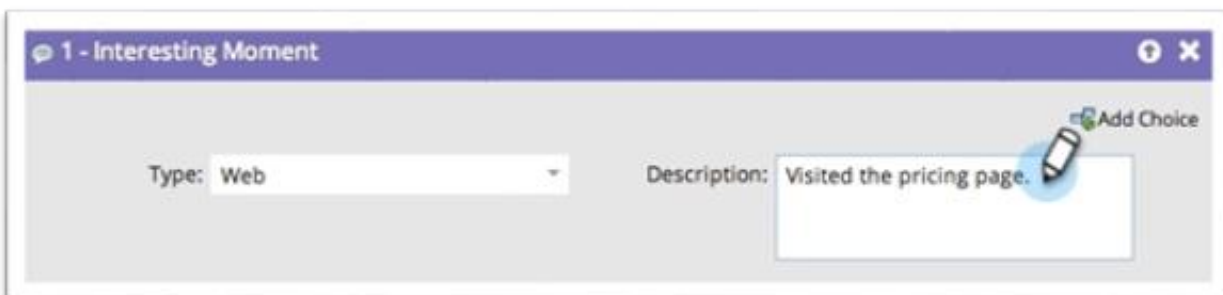4. Select the **type** of **Interesting Moment (Email, Milestone**, or **Web).** Make sure that the type is aligned to the trigger you have selected in the **Smart List.**
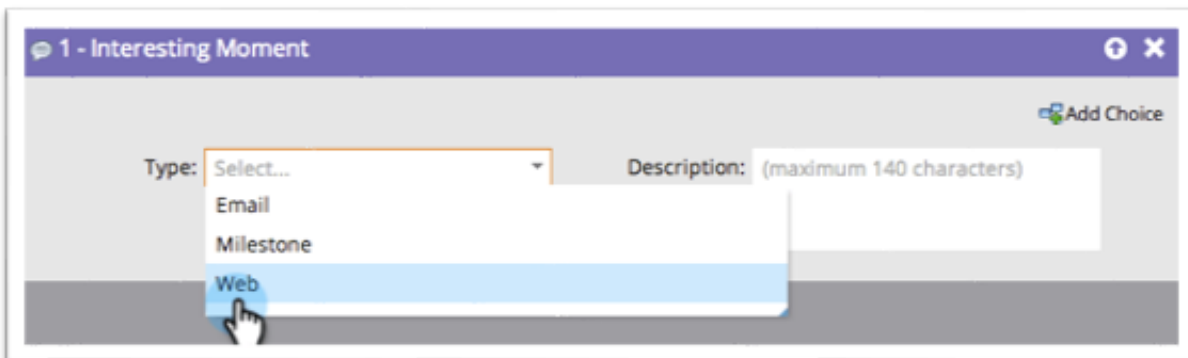


Note**:** Milestone is a customized field, where you can add whatever interesting moments you would like to add

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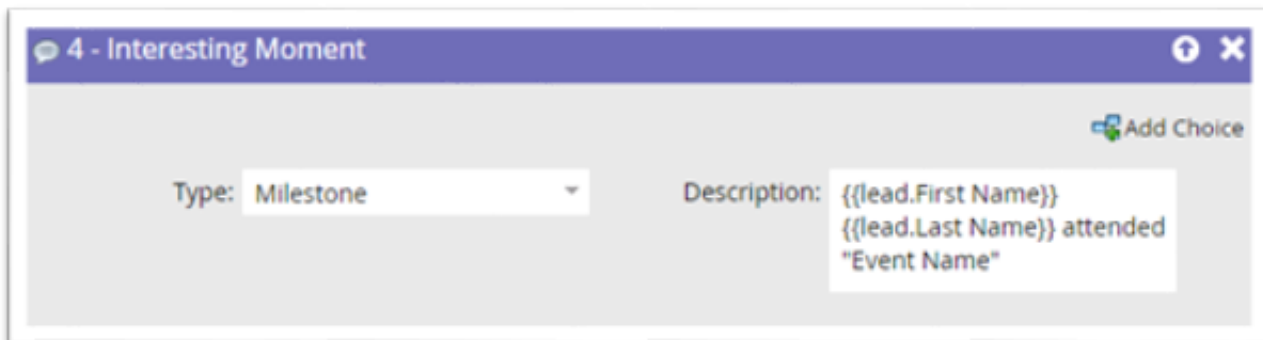
## Adding Tokens to Description

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.



## How does an Interesting Moment look like in Marketo?
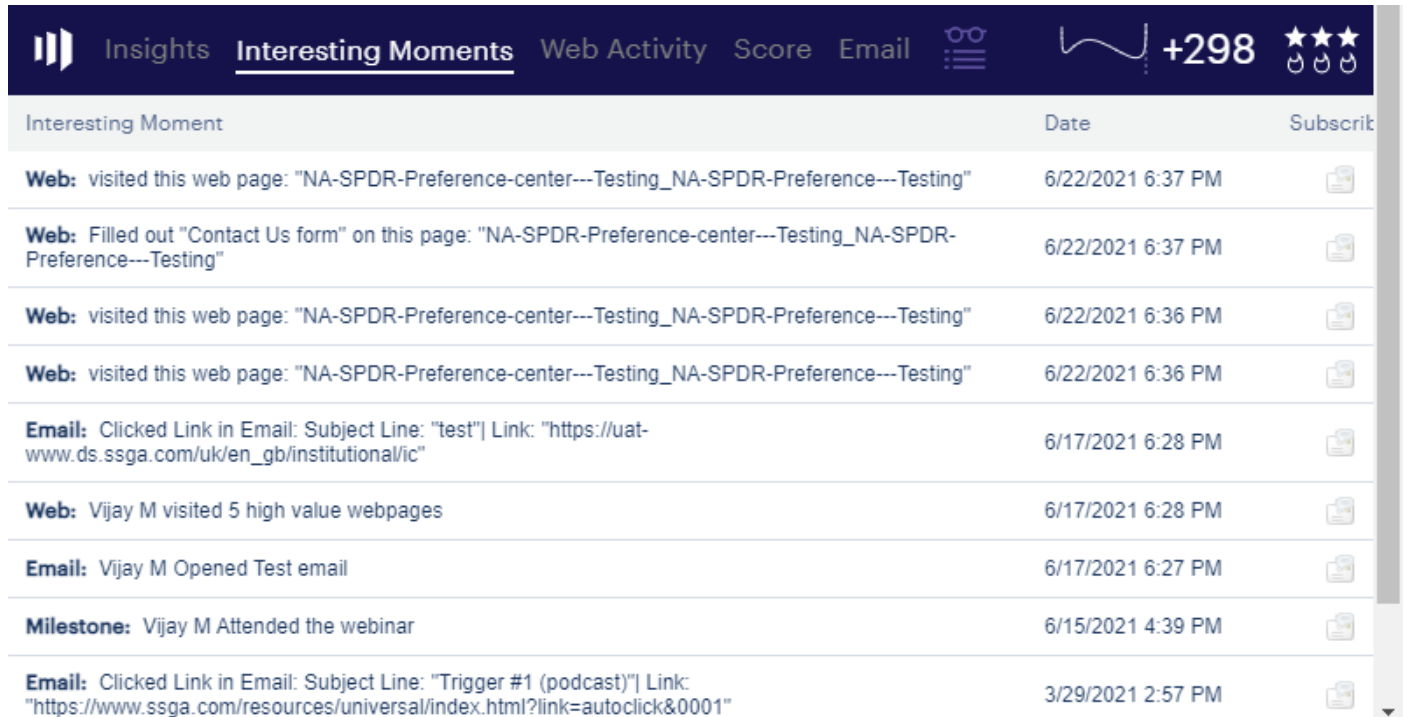
To view the interesting moments in Marketo you can go to the lead's activity log. Click here to read more about activity log.

## 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.



| Insights | **Interesting Moments** | Web Activity | Score | Email | | | +298 | |
|---|---|---|---|---|---|---|---|---|
| Interesting Moment | | | | | Date | | | Subscrib |
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | | | | | 6/22/2021 6:37 PM | | | |
| **Web:** Filled out "Contact Us form" on this page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | | | | | 6/22/2021 6:37 PM | | | |
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | | | | | 6/22/2021 6:36 PM | | | |
| **Web:** visited this web page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing" | | | | | 6/22/2021 6:36 PM | | | |
| **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 | | | |
| **Milestone:** Vijay M Attended the webinar | | | | | 6/15/2021 4:39 PM | | | |
| **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 | | | |