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Marketo Sales Insight Dashboard Guide

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Marketo Sales Insight

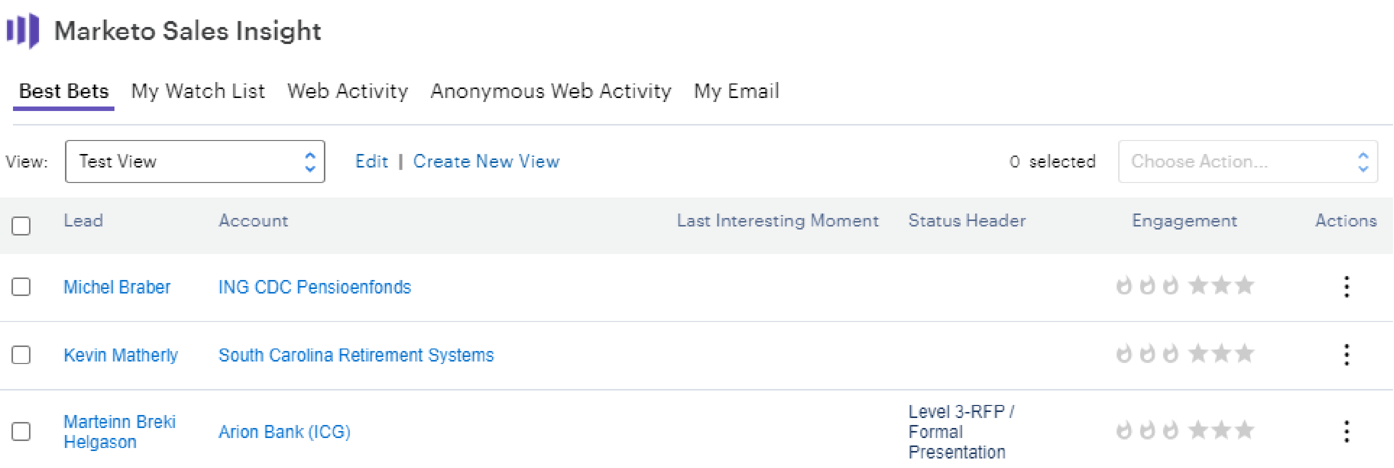
Marketo Sales Insight or MSI is a native Salesforce application that can be installed if a Marketo integration exists. The sales team gains visibility of the lead's interactions with the company website and other marketing assets with its use. MSI is available on the Lead, Company Employee record & Company objects level. With the new Marketo update, MSI can also be seen at an Account level to see how leads from a particular company are engaging with marketing activities

Marketo Sales Insight Dashboard

Marketo Sales Insight dashboard provides more insights at the ownership level. Here are the features available on Marketo Dashboard:

Best Bets:

The tab "**Best Bets**" picks your best leads and contacts based on their priority. A lead or contact's priority has two components – **Urgency and Relative Score**. Your Best Bets are your leads and contact with the highest urgency and relative score.

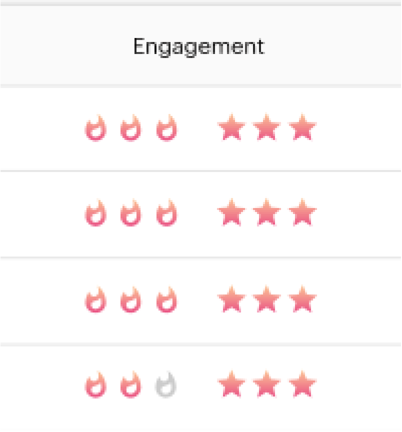


These are derived from the lead score – a measure of the person's interest in your product(s). The higher the score, the more they will respond positively to a call from your sales team.

Urgency

The flames represent urgency— More flames means the lead's score is increasing at a faster rate than others in your database, and signifies a higher "urgency".

For example, a lead who requested a demo and visited several web pages will probably have a very high urgency. A lead who didn't visit your web page or open your emails will have a low urgency. Use urgency to prioritize who needs to be contacted next.



Relative Score

The stars represent relative score – a measure of how this person's lead score compares to everyone else's. A high relative score means this person is probably more interested and informed about your offer compared to people with lower scores.

If two leads have the same urgency, you can use relative score to tell which one deserves a phone call first. The one with the higher relative score may react more favorably to your offer versus the lower one.

A lead with high urgency and high relative score is more likely to respond positively, and hints from their last interesting moment can help close the deal. Only the leads you own are visible in the list, and the list is updated with the change in lead score..

How Urgency and Relative Score are calculated

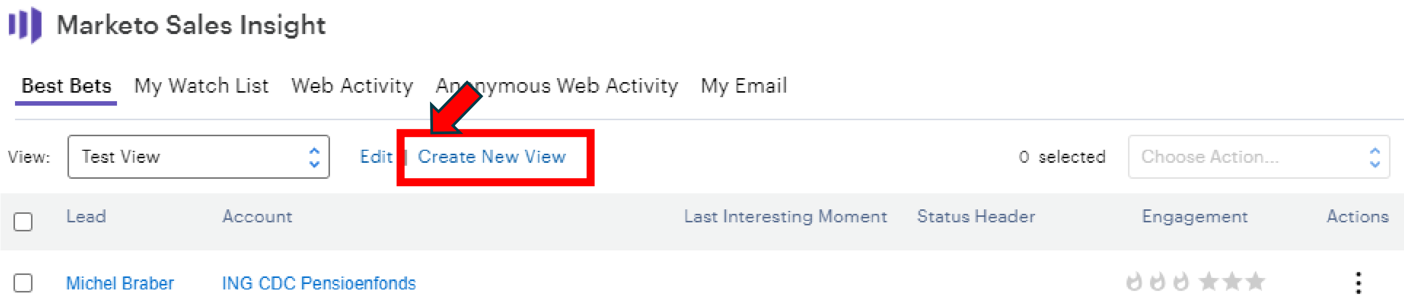
To calculate the number of stars and flames, your leads and contacts are first sorted by score or score changes (for Relative Score and Urgency, respectively). Then they're divided into tiers – the top tier receives the most stars or flames, the next receives fewer, and so on.

Note:

The Relative Urgency (Flames) and Relative Score (Stars) count are integers in Marketo. Possible values for each are 0-3.

As mentioned above **My Best Bets** would only show the Contacts & Leads owned by you. However, you could still **create a new view** to see the entire contacts from a specific region/country by following these steps:

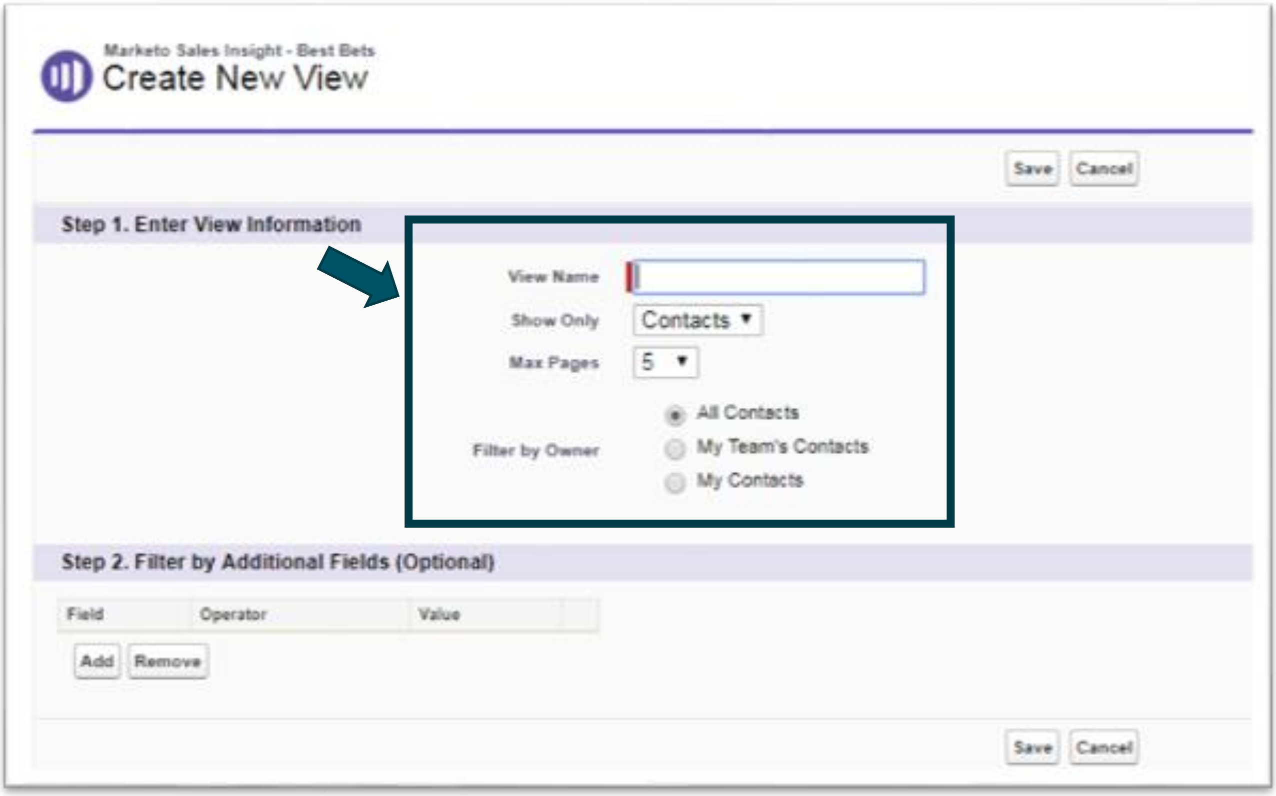
1. Click **'Create New View'**



2. Fill the details

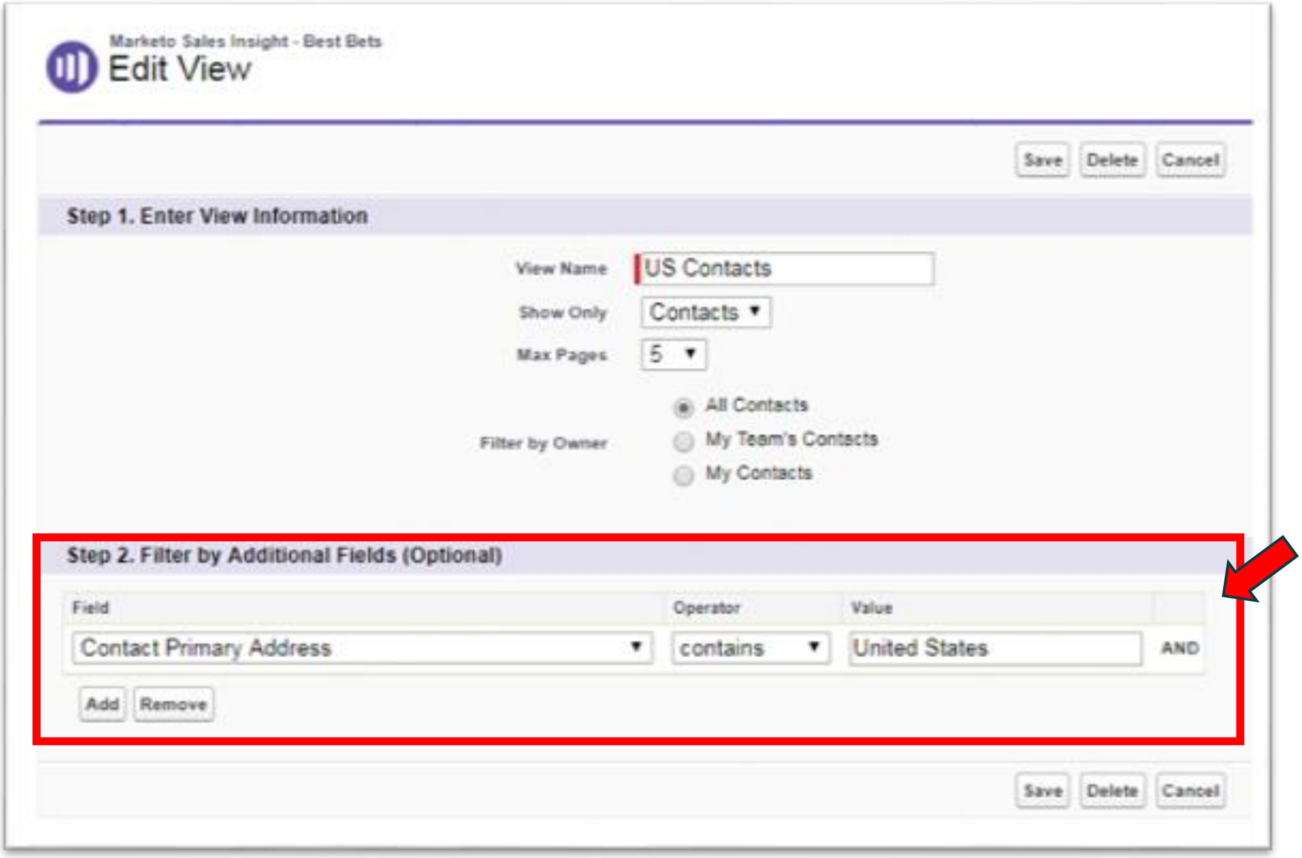
Step 1: Enter View Information

- View Name - Type in Custom Name of the view
- Show only - Choose to show Contacts
- Max Pages - Max number of pages of records you would like to see (20 records per page)
- Filter by owner - Choose All Contacts

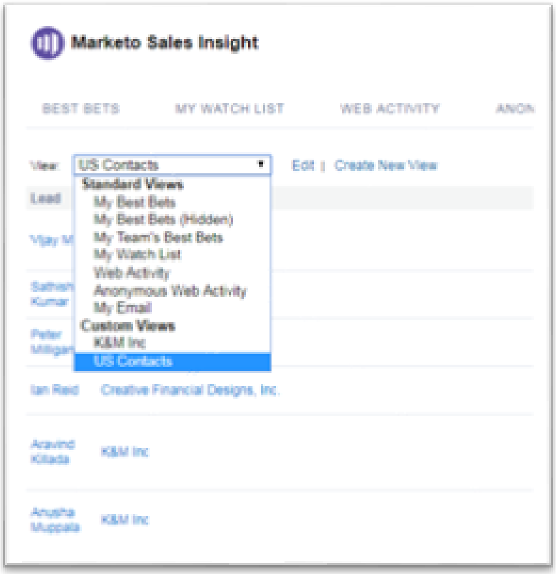


Step 2: Filter by Additional Fields:

- Click Add button
- Choose Contact Primary Address from the drop down
- Choose Operator 'Contains'
- Type in the Country value 'United States' or the respective country



Once all the details are provided hit the save button. A new view will be created under your custom view drop down.



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My Watch List

A salesperson can easily keep track of hot leads by adding them to their watch list. Keeping a close watch on the lead's actions would help decide the right time to call the lead and make a sales pitch.

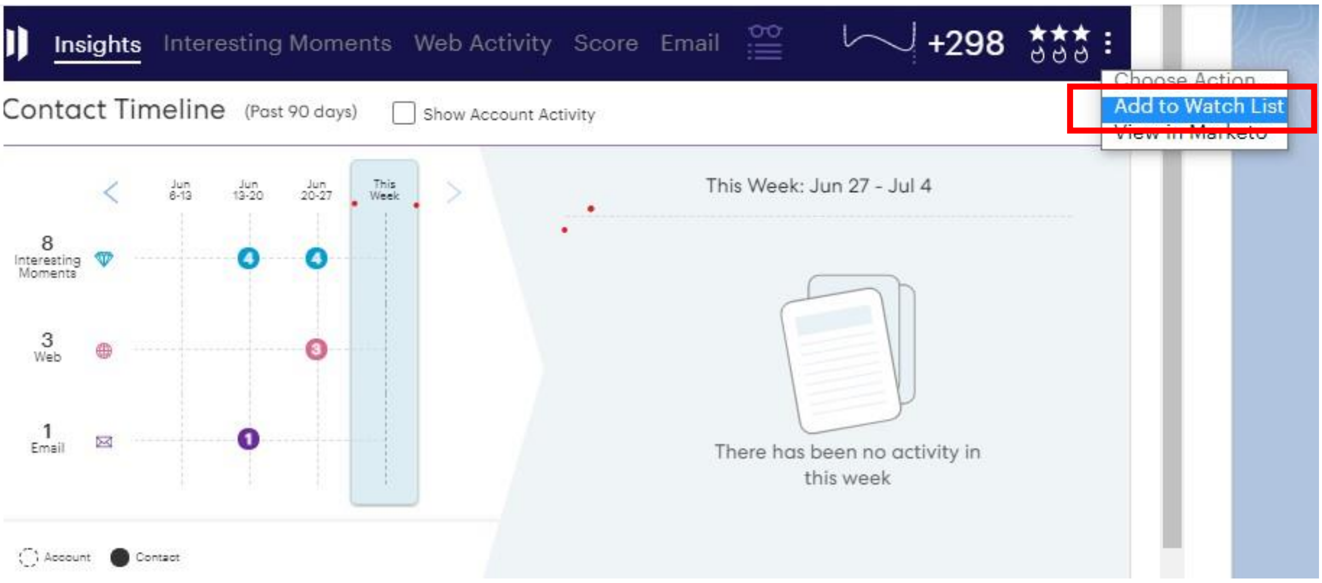
Leads & Company employees that you do not own can be added to your watch list. Once they are added, they will be displayed under My Watch List tab.

You will have two ways to add a Lead or Contact to Watch List.

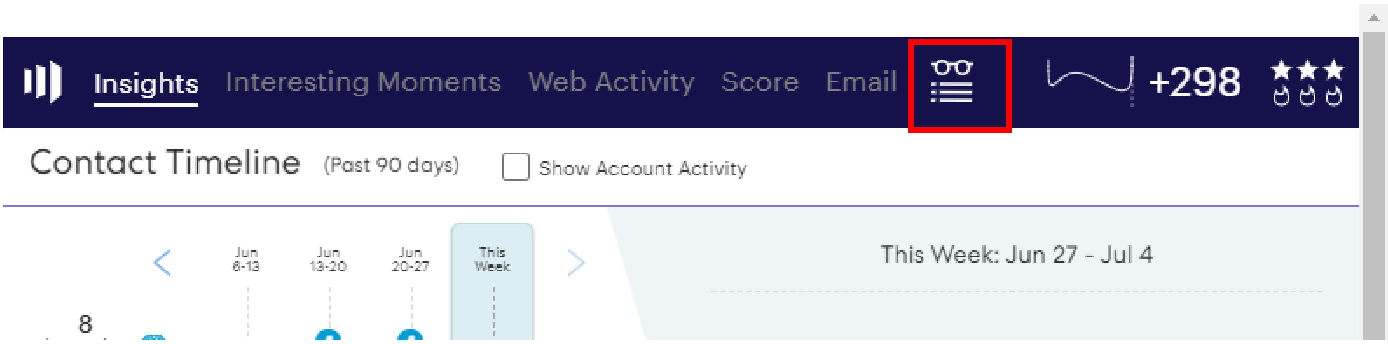
1. **Adding a lead or Contact from Sales Insight Layout**

Any Lead/Contact can be added to My Watch List by following the steps below:

- Go to Lead/Contact record
- Scroll down to Marketo Sales Insight section
- Select Add to Watch List from the drop down menu & hit go



Once added to My Watch List, the leads/contacts can be seen by clicking the below icon:



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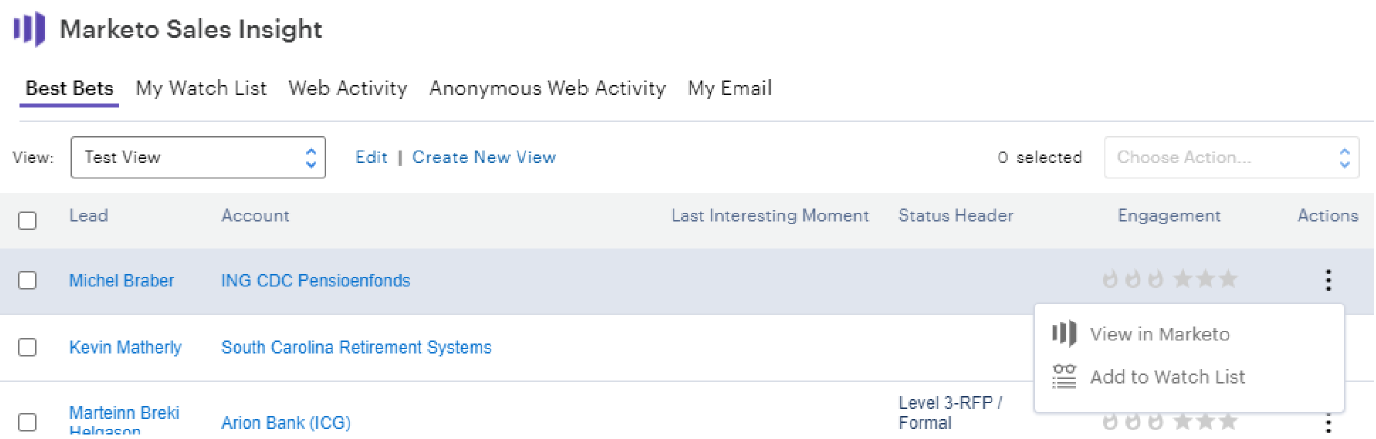
2. Add selected contacts or leads to Watch list inside Marketo Sales Insight Dashboard:

a. Adding a single contact to Watch list

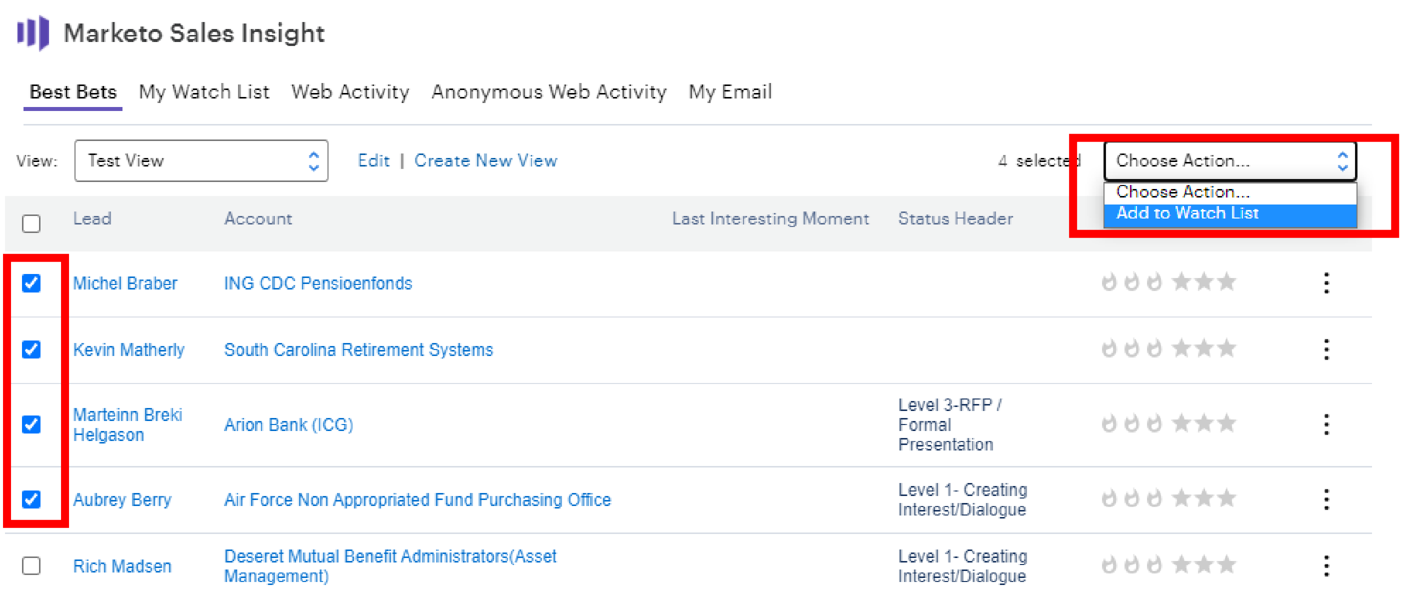
- Go to Lead or a Contact record
- Scroll down to Marketo Sales Insight section
- Select Add to Watch List from the drop down menu & hit go



b. Adding multiple lead or contacts to Watch List:

Marketo updated a new feature to add all contacts or selective multiple leads or contacts:

- Select Check-in box next Lead (To add all) or on each lead or contact you may want to see in Watch list
- Scroll down to Marketo Sales Insight section
- Select Add to Watch List from the drop down menu & hit go



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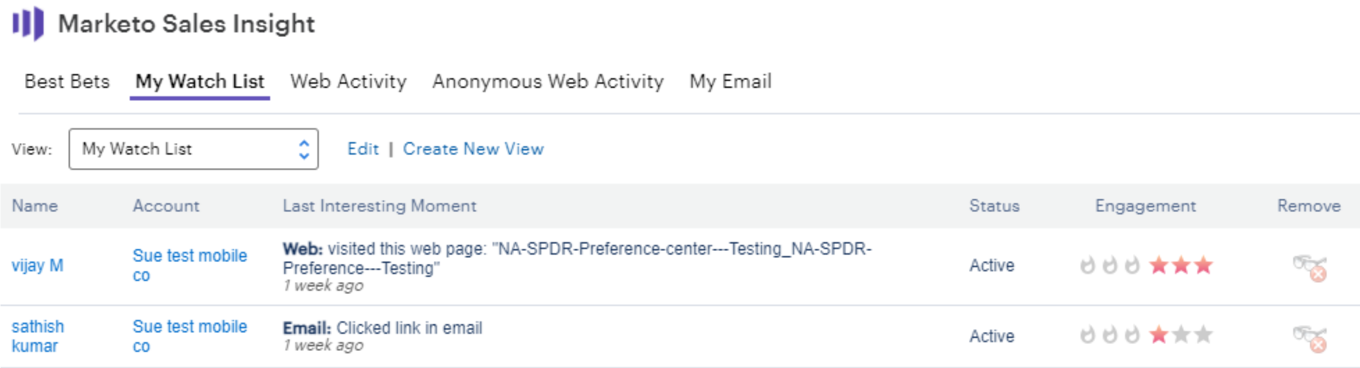
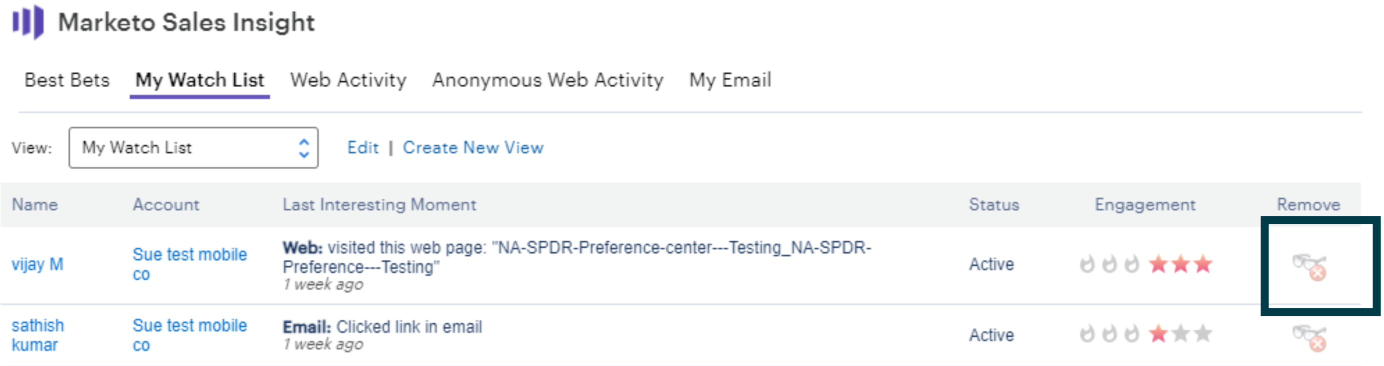
My Watch List tab under Marketo Sales Insight Dashboard:



How to remove a Lead or Contact from your Watch List:

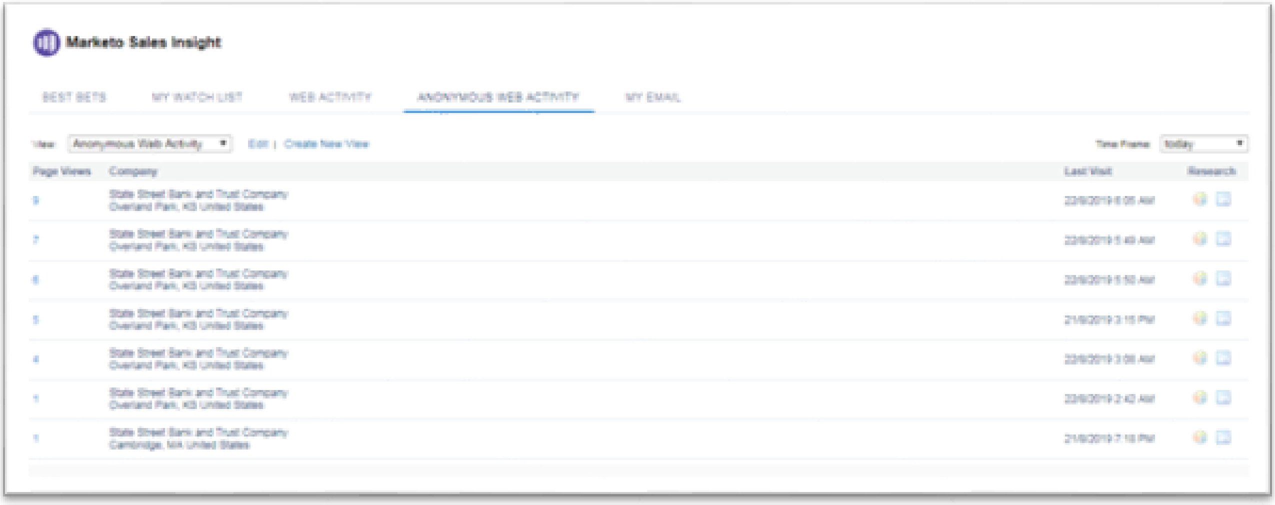


Web Activity:

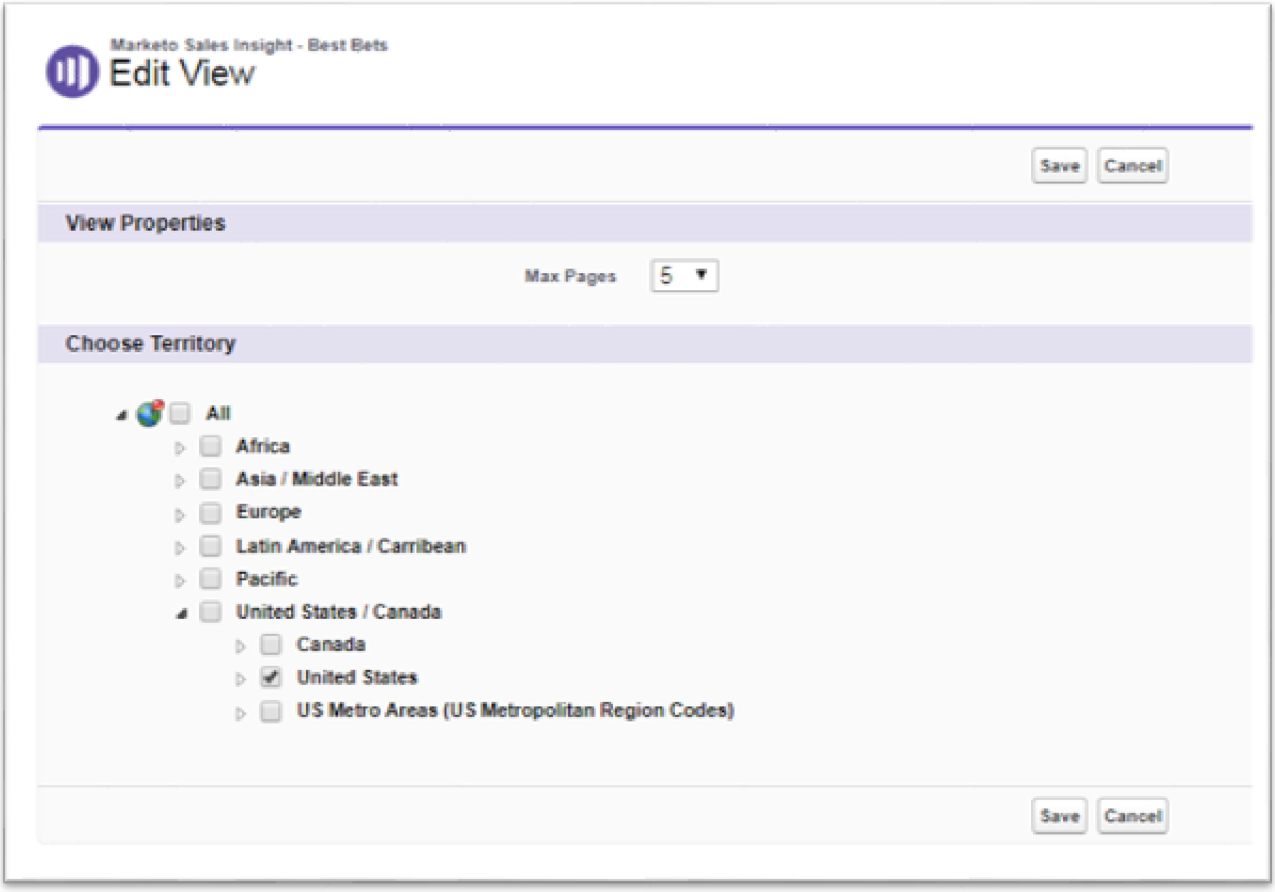
Web related activities of the Leads or Contacts that you own will be displayed under this section. Unfortunately, you won't be able to see the activities of records that you don't own in Salesforce.

Anonymous Web Activity:

All records that are cookied by Marketo (haven't filled out a Marketo form or clicked any Marketo emails) will be tracked anonymously. These anonymous activities are displayed under the Anonymous Web Activity section. You can see all the web pages an anonymous person has visited by clicking the numbers under page views. This section displays all inferred data based on the visitors IP address.



You can edit the view to show only activities specific to any of the following regions or country.



Using the Lead Feed

The Lead Feed is an up-to-the –minute list of interesting events done by your lead. You'll find it on the right-hand side when you click the Marketo tab. It's like an RSS or Twitter feed – the most recent updates are at the top of the list. Use this to jump on leads while you're still fresh in their minds.

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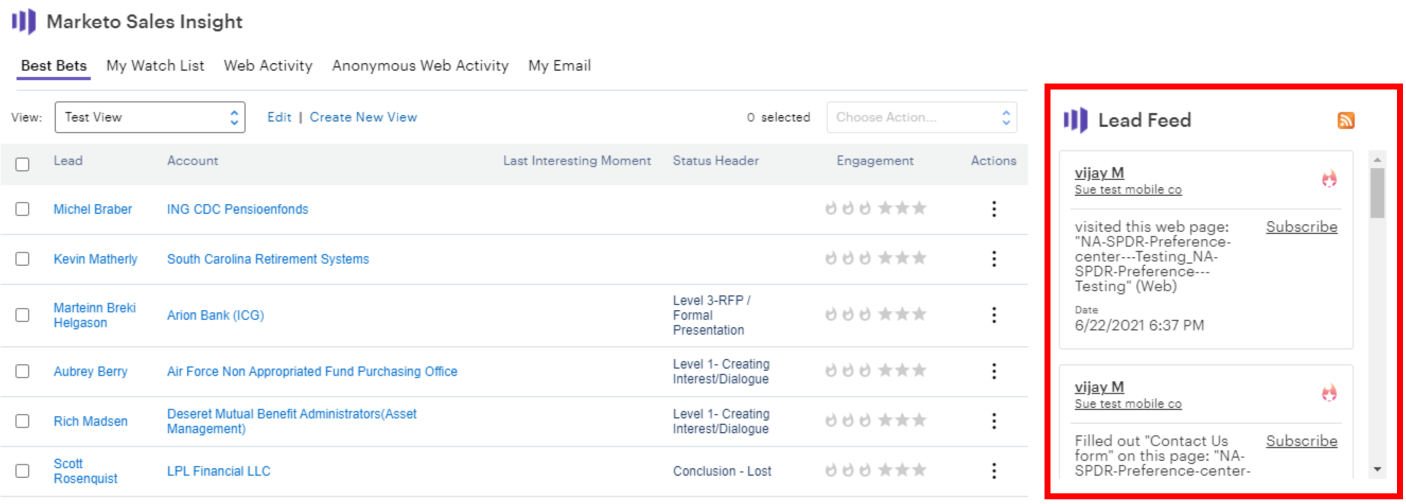
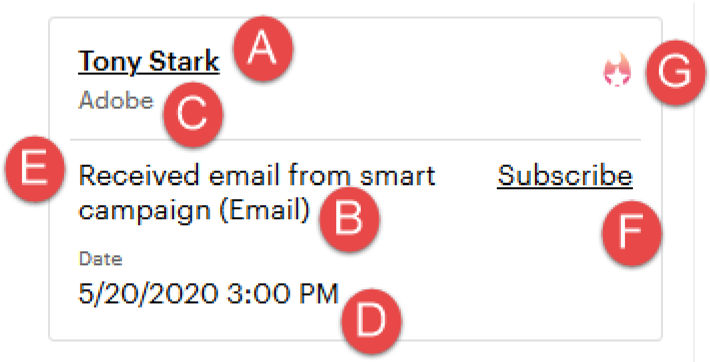
What’s in the Lead Feed?

The lead feed includes both the leads you own and the leads in your watch list.



Each item in the lead feed is an interesting moment – a noteworthy activity or event in this lead’s marketing history

When viewing it in Salesforce, each item has:



Item	Description
A. Lead/Contact	Person who had this interesting moment
B. Event Type	Category for this moment -- web, email, or milestone
C. Account Name	Company name
D. Time	When this interesting moment occurred
E. Event Description	Reason for this interesting moment
F. Subscribe	Receive email notification for events like this