
Marketo Sales Insight

Marketo Sales Insight (MSI) is a great tool with a variety of functions; it is available on the Lead & Company Employee record level. Also, there is a separate [Marketo Sales Insight dashboard](#) which provides additional information of all the records owned by the Sales User.

MSI page layout under Lead & Company Employee records in Salesforce

The MSI Page layout is available under details section of a Lead, Company Employee record and Company objects. Here is the list of functions available on the MSI Page Layout.

MSI Visualforce Panel includes the following functionalities:

- Insights Dashboard
- Interesting Moment
- Web Activity
- Email
- Score

MSI page layout under Company Object in Salesforce

Marketo added MSI Layout on Account level to layer all account level Interesting Moments, Email and Web Activity in the contact view

All the information which you're able to see under company employee object in Account object. The smart grid and Engagement Drill-Down bar details includes Interesting Moments, Email and Web Activity in the last 90 days for all contacts in the account.

Insights Interesting Moments Web Activity Score Email

Account Timeline (Past 90 days)

Week of Apr 4 - Apr 11
 2 Interesting Moments 0 Web 0 Email

APR 06 **INTERESTING MOMENT**
 JAMES HANEY
 Email: Clicked Link in Email: Subject Li...

APR 06 **INTERESTING MOMENT**
 JAMES HANEY
 Email: Clicked Link in Email: Subject Li...

[Go to the page view](#) [Give Feedback](#)

Insights Dashboard:

This tab provides an overview of person’s complete action in past 90 days including web, email and interesting moment activity.

There is also an option to switch into Account object to see how the contacts of the account are engaging with our marketing activities.

Insights Interesting Moments Web Activity Score Email +298

Contact Timeline (Past 90 days) Show Account Activity

Week of Jun 20 - Jun 27
 8 Interesting Moments 3 Web 1 Email

JUN 22 **WEB**
 NA-SPDR-Preference-center---Test... >

WEB
 NA-SPDR-Preference-center---Test... >

WEB
 NA-SPDR-Preference-center---Test... >

INTERESTING MOMENT
 Web: visited this web page: "NA-S... >

INTERESTING MOMENT
 Web: visited this web page: "NA-S... >

INTERESTING MOMENT
 Web: Filled out "Contact Us form" ... >

Account Contact

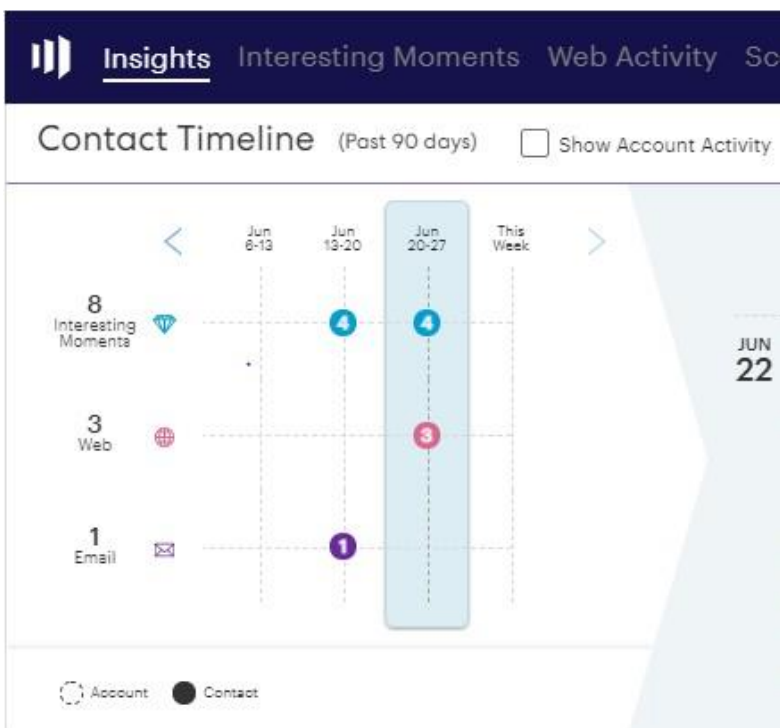
There are major two functionality under Sales Insight tab as follows:

A. Engagement Velocity Grid

This smart grid includes person's Interesting Moments, Email and Web Activity in the past 90 days.

The velocity grid shows the numbers of activities within each week with the break-down of Email, Web and Interesting Moment. Users have the ability to click on each week in order to see particular activities within that week.

Only the data for the past 90 days will be visible in the Insight tab.



B. Engagement Drill Down and Summary

This section provides all types of engagement details of the record for each week selected in the grid line. It drills down activity card for Interesting Moment, Email and Web Activity. Each icon from the summary bar are clickable providing additional information.

MSI users can subscribe to Interesting Moment activity, preview emails, and have ability click on links of web activity from Engagement Drill Down and Summary section.

The screenshot shows the 'Contact Timeline' interface. At the top, there is a navigation bar with 'Insights' and various filters: 'Interesting Moments', 'Web Activity', 'Score', and 'Email'. A score of '+298' and three stars are displayed on the right. Below the navigation bar, the 'Contact Timeline' section is titled '(Past 90 days)' and includes a checkbox for 'Show Account Activity' which is checked. The main area features a timeline grid with columns for 'Jun 6-13', 'Jun 13-20', 'Jun 20-27', and 'This Week'. The grid shows activity counts for 'Interesting Moments' (8), 'Web' (3), and 'Email' (1). A red box highlights the detailed activity list for the week of Jun 20 - Jun 27, which includes 4 Interesting Moments, 3 Web activities, and 0 Emails. The activities listed are:

- JUN 22 WEB NA-SPDR-Preference-center---Test... >
- JUN 22 WEB NA-SPDR-Preference-center---Test... >
- JUN 22 WEB NA-SPDR-Preference-center---Test... >
- JUN 22 INTERESTING MOMENT Web: visited this web page: "NA-S... >
- JUN 22 INTERESTING MOMENT Web: visited this web page: "NA-S... >
- JUN 22 INTERESTING MOMENT Web: Filled out "Contact Us form" ... >

Users can check “Show Account Activity” to see all the account level Interesting Moments, Email and Web Activity in the contact view

This screenshot shows the same 'Contact Timeline' interface as above, but with the 'Show Account Activity' checkbox unchecked. The rest of the interface, including the navigation bar, timeline grid, and activity list, remains the same.

Interesting Moments

Interesting moments describes the behavioral activities of a person record.

Type of interesting Moments:

- **Email:** Shows all record's email related activities
- **Web:** A record's complete web page related activities
- **Milestone:** Milestone could be a certain number of email clicks or web visits within a time period

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	

Users can also subscribe to interesting moments for a specific Person or Company or Type or Description

Email Subscription

Subscribe to email alerts for this kind of Interesting Moment

Name: vijay M

Account: Sue test mobile co

Type: Web

Description: Filled out "Contact Us form" on this page: "NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing"

Send Email To

Email: (use comma separated for multiple addresses)

Web Activity

Web Activity tab displays all web related activities for that person record like the name of the web page, search engine/referrer page & date/time of the visit.

Web Page	Search / Referrer	Date
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html		6/22/2021 6:36 PM
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html		6/22/2021 6:34 PM
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html	statestreetglobaladvisors-sf-fulluat2.lightning.force.com	6/22/2021 6:29 PM
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html	na-ab10.marketo.com	11/26/2020 7:09 PM
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html	na-ab10.marketo.com	11/26/2020 7:04 PM
940-lvy-116.mktoapi.com/lp/940-LVY-116/NA-SPDR-Preference-center---Testing_NA-SPDR-Preference---Testing.html	na-ab10.marketo.com	11/25/2020 11:44 PI

Note: Clicking the hyperlinks would take you to that specific webpage the person visited.

Score

Score tab shows the overall score of the record. It's an amalgamation of all scoring buckets for a specific Line of Business (IBG or INST)

Score Name	Change	Total	Date	Campaign
Lead Score	+2	298	6/22/2021 6:37 PM	Lead Scoring Model.LS - Visits Web Page
Lead Score	+10	296	6/22/2021 6:37 PM	Lead Scoring Model.LS - Filled out form
Lead Score	+2	286	6/22/2021 6:36 PM	Merge from anonymous lead
Lead Score	+2	2	6/22/2021 6:36 PM	Lead Scoring Model.LS - Visits Web Page
Lead Score	+2	284	6/17/2021 6:28 PM	Lead Scoring Model.LS - Click Link in Email
Flames Score	+20	50	6/15/2021 6:06 PM	Manual change
Lead Score	+20	282	6/15/2021 6:04 PM	Manual change

Note: **Break down of the scoring models is available under Engagement Scores page layout.**

Engagement Scores	
TDF Score	Index Score
Retirement Score	Real Estate Score
OCIO Score	Cash Score
ESG Score	Smart Beta INST Score
Active Score 5	Fixed Income Score
Defined Benefit Score 30	

Email

Email related activities are displayed under this tab. It shows the **Subject** of the email, **Open & Click** activities as well. The email delivery status of each email can also be seen by clicking “Check Delivery Status”

Subject	Date	Opened	Clicked	Check Delivery Status
test	6/17/2021 6:27 PM		✓	
Trigger #1 (podcast)	3/29/2021 2:55 PM		✓	
Smart Beta Campaign	10/30/2020 1:00 PM		✓+	
Go to list (3) »				Give Feedback

Note: **Clicking the Subject would help you to preview the actual email sent to that person.**

MSI Buttons

There is a drop down available at the top right corner of MSI page layout. Here are the options available on the drop down:

The screenshot displays the MSI interface. At the top, there is a navigation bar with 'Insights' selected, followed by 'Interesting Moments', 'Web Activity', 'Score', and 'Email'. A search icon, a line graph, and '+298' are also visible. Below the navigation bar, the 'Contact Timeline' section is shown for '(Past 90 days)' with a 'Show Account Activity' checkbox. The timeline is a grid with columns for 'Jun 6-13', 'Jun 13-20', 'Jun 20-27', and 'This Week'. On the left, there are counts for '8 Interesting Moments', '3 Web', and '1 Email'. The 'This Week' column is highlighted, showing '4' Interesting Moments, '3' Web, and '1' Email. To the right, a detailed view for 'Week of Jun 20 - Jun 27' is shown, including a 'JUN 22' entry with 'WEB' activity and 'INTERESTING MOMENT' entries. A dropdown menu is open over the 'Remove from Watch List' button, showing options: 'Choose Action...', 'Remove from Watch List', and 'View in Marketo'.

- **Add to Watch List** – Use this feature to quickly add the person record to your watch list. People added to your Watch List are available under the Marketo Dashboard. These records can be removed from My Watch List anytime.
- **View in Marketo** – This would open the lead record in Marketo showing all the activities of the person record in the Marketo's Activity Log tab.