



Learn. Network. Grow.

MParDreamin' 2022

Unlock B2BMA: Going Beyond Stock Dashboards

Duncan McGovern

Principal, Pedal Lucid



Goal For Today

This session will provide a brief overview of CRM Analytics and how B2BMA fits into the landscape. We'll also walk through specific examples of how marketers can leverage this tool beyond the out-of-the-box reporting dashboards.

Special Thanks To Our Sponsors



Title

SERCANTE



Platinum

D=SELECT

stensul

tray.io

Gold

FormAssembly

LeanData

STACK MOXIE

THE SPOT
FOR PARDOT by SERCANTE

Silver

MarketingOps

Goldcast

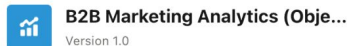
THE SPOT
FOR PARDOT JOBS

GREENKEY

FIONTA

What is B2BMA?

B2B Marketing Analytics (Object Sync for Pardot) Details



Version 1.0

Overview

To improve performance and flexibility with B2B Marketing Analytics (Object Sync for Pardot) apps, use Object Sync for Pardot. As of Summer '21, select this app template for more control over your data.

Marketing Manager Sales Manager

Sales Operations

Features

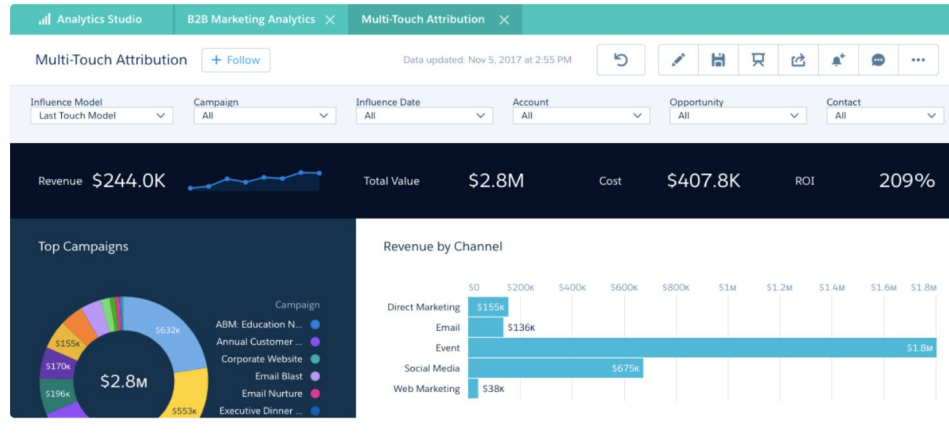
Marketing Manager, Pipeline, and Engagement Dashboards
Optional Account-Based Marketing, Multi-Touch Attribution, and Einstein Behavior Scoring Dashboards
Datasets for prospects, visitors, marketing assets, and more

Salesforce Objects for Optional Dashboards

Account
Campaign
Contact

B2B Marketing Analytics (Object Sync for Pardot)

Get more flexible performance from your B2B Marketing Analytics apps when you enable Object Sync for Pardot. Customize your data replication schedule, and choose which prospect custom fields to pull into CRM Analytics.



Exit

Back

Continue

Analytics for Marketers



Preparation

CRMA
Orientation

Use Cases

PARDOT PEAK 7.1

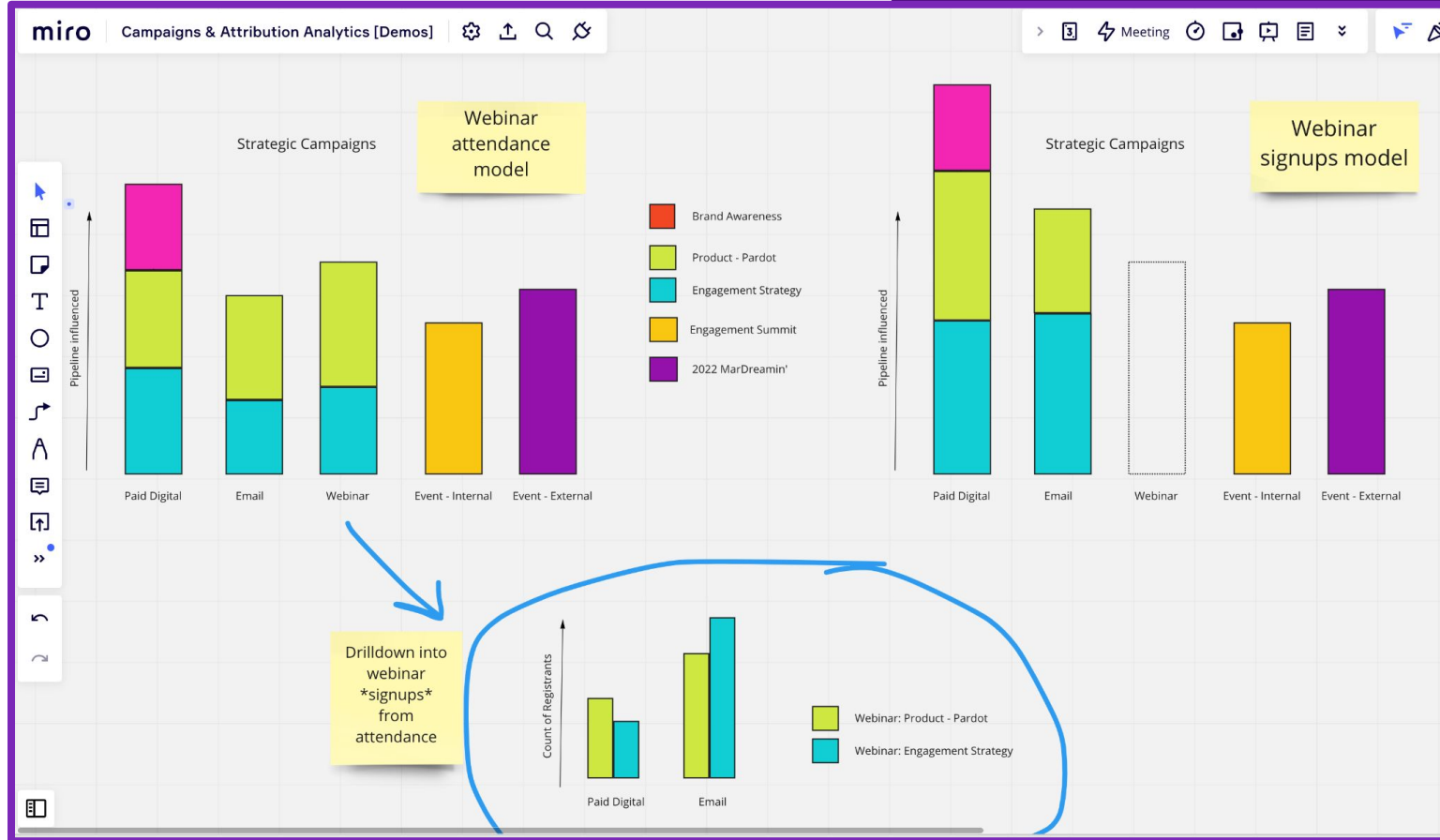
CONVERSION CANYON 2.6

REVENUE RIVER 3.9



Preparation & CRMA Orientation

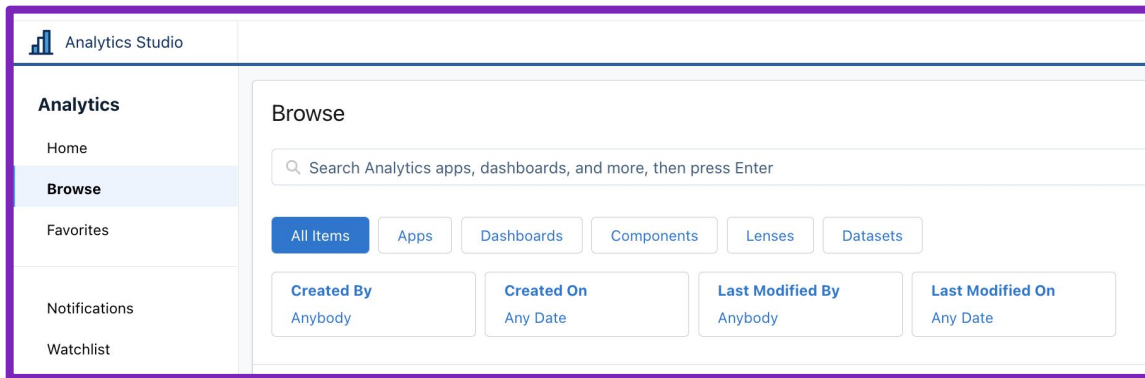
Draw Your Data



Getting Oriented - Front End



- **Salesforce App:** CRMA lives inside Salesforce and is accessible through the App Launcher
- **CRM Analytics App:** Collections of assets within CRMA
- **Dashboard:** A collection of visualizations to present data in a particular way
- **Component:** A reusable building block of a dashboard
- **Lens:** A particular way of looking at a dataset
- **Dataset:** Building block of all of the above

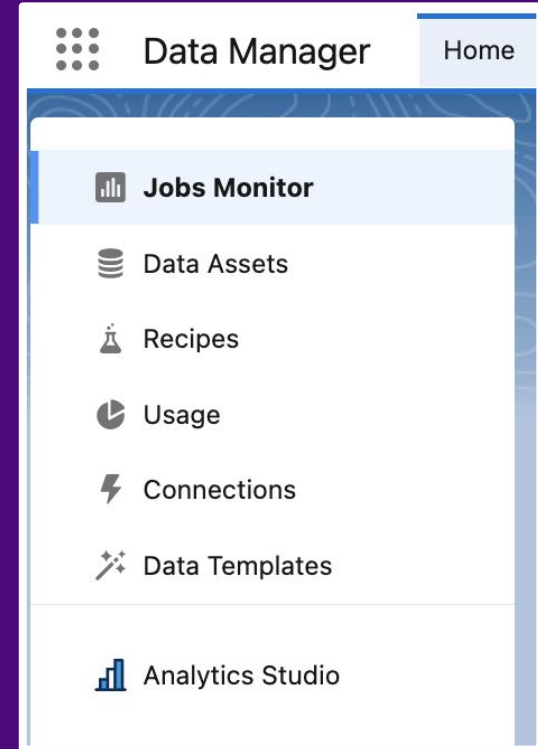


Getting Oriented - Back End



Data Manager - Back end workspace

- **Jobs Monitor**
 - Actions that are in progress or have been completed to pull in and/or modify data
- **Data Assets**
 - Datasets available for use/exploration
- **Recipes**
 - Modify and prepare raw data for use
- **Usage**
 - Company limits
- **Connections**
 - Control what Salesforce (other other system) data is ingested into CRMA





Use Cases

Leads + Contacts in an ABM Context

Problem: Prospects are added as both Leads & Contacts; MQ's are not defined as lead conversion but based on other fields/factors; desire to see outcome of record acquisition in one place

Solution: Use CRMA to join Lead, Contact & Opportunity data for comprehensive person lifecycle reporting

Start with Leads



We're pulling in Salesforce Leads and choosing a couple of key fields.

The screenshot shows the 'Add Input Data' dialog in the CRMA application. The left pane lists various data sources under the 'Datasets, Connected, Direct' filter. The 'Lead' source is selected. The right pane, titled 'Selected Columns (Lead)', shows a list of 84 columns. Seven columns are selected: 'Id', 'Last Name', 'First Name', 'Company', 'Deleted', 'Master Record ID', and 'Salutation'. Each column has a checkbox and a gray icon to its right. The 'Next' button is visible at the bottom right of the dialog.

Name	Location	Created Date	Created By	Last Modified ...	Last Modified ...
<input checked="" type="checkbox"/> Lead	SFDC_LOCAL	Mar 8, 2021 at ...	Automated Pro...	Mar 8, 2021 at ...	Automated Pro...
<input type="checkbox"/> LeadChangeEvent	SFDC_LOCAL				
<input type="checkbox"/> LeadCleanInfo	SFDC_LOCAL				
<input type="checkbox"/> LeadFeed	SFDC_LOCAL				
<input type="checkbox"/> LeadHistory	SFDC_LOCAL				
<input type="checkbox"/> LeadShare	SFDC_LOCAL				
<input type="checkbox"/> LeadStatus	SFDC_LOCAL				
<input type="checkbox"/> pi__Category__Lead__Score__...	SFDC_LOCAL				
<input type="checkbox"/> pi__Category__Lead__Score__c	SFDC_LOCAL				
<input type="checkbox"/> pi__LDFilter__ChangeEvent	SFDC_LOCAL				
<input type="checkbox"/> pi__LDFilter__Share	SFDC_LOCAL				
<input type="checkbox"/> pi__LDFilter__c	SFDC_LOCAL				

Name	API Name
<input checked="" type="checkbox"/> Id	Id
<input type="checkbox"/> Deleted	IsDeleted
<input type="checkbox"/> Master Record ID	MasterRecordId
<input checked="" type="checkbox"/> Last Name	LastName
<input checked="" type="checkbox"/> First Name	FirstName
<input type="checkbox"/> Salutation	Salutation
<input type="checkbox"/> Name	Name
<input type="checkbox"/> Title	Title
<input checked="" type="checkbox"/> Company	Company
<input type="checkbox"/> Street	Street
<input type="checkbox"/> City	City
<input type="checkbox"/> State/Province	State

The gray icon to the right means they haven't been pulled into CRMA yet, but will on the next refresh

Remove Converted Leads



Remember you're working with 'raw' data and need to specify particulars that might not be of concern in other contexts

FILTER
Remove Converted Leads

Filters

Converted
EQUALS false



Preview Columns

A _a	A _a Last Name	A _a First Name	A _a Company	A _a Lead Source	A _a Industry	A _a Lead Source Campaign	A _a Converted
00Q3i0000061qG8EAI	Apple	Jon	Zamzoo	Purchased List		7013i000000t45TAAQ	false
00Q3i0000027WfOEAU	Cotton	Phyllis	Abbott Insurance	Conference		7013i0000003VSdAAM	false
00Q3i0000027WfPEAU	Glimpse	Jeff	Jackson Controls	Paid Search		7013i000000Y3YLA00	false
00Q3i0000027WfQEUA	Braund	Mike	Metropolitan Health Services	Purchased List		7013i000000t45OAAQ	false
00Q3i0000027WfREAU	Feager	Patricia	International Shipping Co.	Trade Show		7013i0000003VSfAAM	false
00Q3i0000027WfTEAU	Macleod	Violet	Emerson Transport	Paid Search		7013i000000Y3YQAA0	false
00Q3i0000027WfUEAU	Snyder	Kathy	TNR Corp.	Display Ad		7013i000000U6sTAAS	false
00Q3i0000027WfVEAU	James	Tom	Delphi Chemicals	Conference		7013i0000003VSdAAM	false
00Q3i0000027WfYEAU	May	Norm	Greenwich Media	Inbound/Website		7013i000000Y3PRAA0	false
00Q3i0000027WfEAE	Monaco	David	Blues Entertainment Corp.	Purchased List		7013i000000t45OAAQ	false
00Q3i0000027WfEAE	Crenshaw	Carolyn	Ace Iron and Steel Inc.	Paid Search		7013i000000Y3YQAA0	false
00Q3i0000027WfFEAE	Dadio Jr	Bill	Zenith Industrial Partners	Inbound/Website		7013i000000Y3PRAA0	false
00Q3i0000027WfGEAE	Luce	Eugena	Pacific Retail Group	Display Ad		7013i000000U6sTAAS	false
00Q3i0000027WfHEAE	Eberhard	Sandra	Highland Manufacturing Ltd.	Purchased List		7013i000000t45OAAQ	false
00Q3i0000027WfIEAE	Bair	Betty	American Banking Corp.	Purchased List		7013i000000t45OAAQ	false

Cancel

Apply

Add Account Fields to Contacts



Unlike in a standard Salesforce report, we only have access to the Account Id in the Contact dataset, and need to specify a join in order to pull in Account Name

Recipe

All Search Nodes, Transformations and Columns...

Back to Data Manager ?

Not saved Save

JOIN Add Account Details

Data to Join

- Contact
- Account

Replace

Join Type

LookUp Left Join Right Join Inner Join Outer Join Cross Join

Join Keys

Contact	Account
Id	= Account ID

+

API Name Prefix for Right Columns

Account

☐ Look Up Multiple Values

Cancel Apply

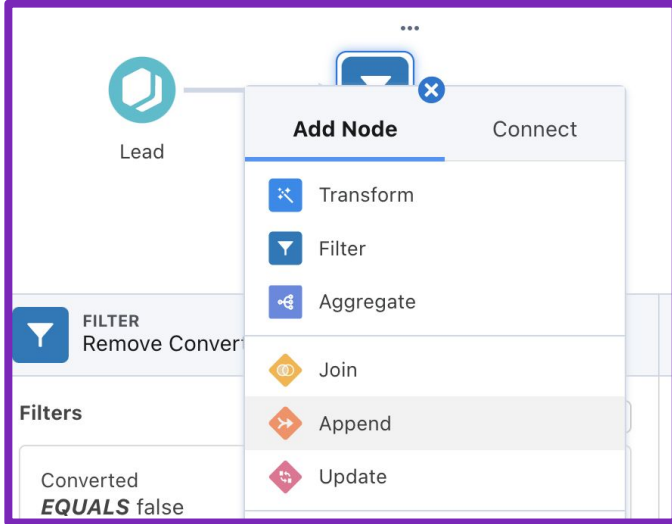
Preview Columns

The 17 checked columns are included in the recipe.

17 Columns Shown in Preview

Name	API Name	Type	Source
<input checked="" type="checkbox"/> Id	Id	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> AccountId	AccountId	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> LastName	LastName	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> FirstName	FirstName	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Name	Name	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Email	Email	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Title	Title	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> LeadSource	LeadSource	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> CreatedDate	CreatedDate	Date Time	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> LastActivityDate	LastActivityDate	Date Time	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> pi_grade__c	pi_grade__c	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> pi_score__c	pi_score__c	Measure	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Newsletter	Newsletter__c	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Lead Source Campaign	Lead_Source_Campaign__c	Dimension	SFDC_LOCAL Contact
<input checked="" type="checkbox"/> Account ID	Account.Id	Dimension	SFDC_LOCAL Account
<input checked="" type="checkbox"/> Account Name	Account.Name	Dimension	SFDC_LOCAL Account
<input checked="" type="checkbox"/> Industry	Account.Industry	Dimension	SFDC_LOCAL Account

Append Contacts



Lead

ADD NODE

Connect

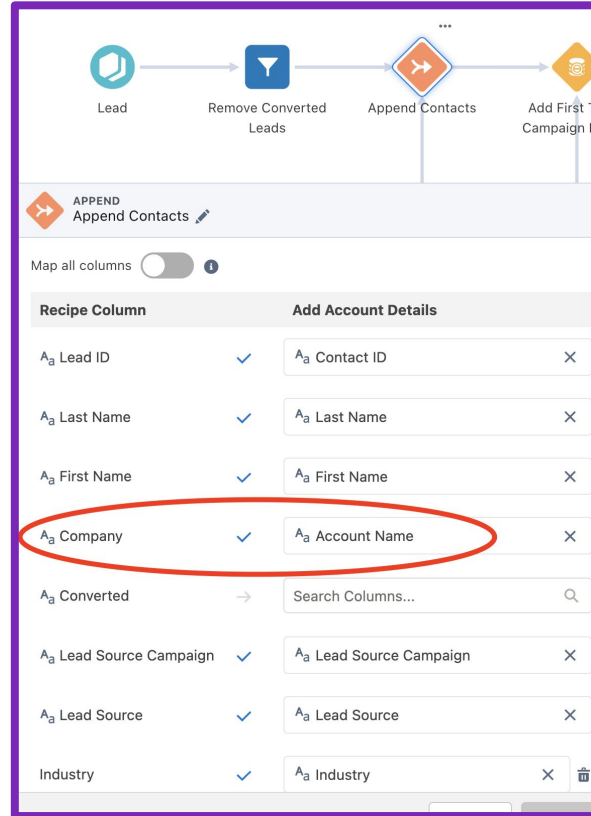
- Transform
- Filter
- Aggregate
- Join
- Append
- Update

FILTER Remove Conver

Filters

Converted
EQUALS false

Append = add more rows to your dataset; in this case by combining Contacts & Leads



Lead → Remove Converted Leads → Append Contacts → Add First T Campaign D

APPEND Append Contacts

Map all columns ☒

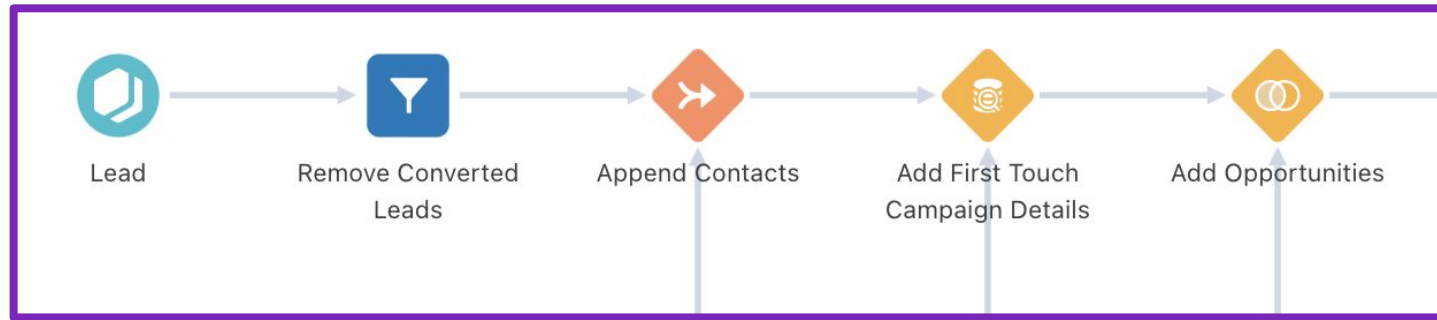
Recipe Column		Add Account Details	
A _a Lead ID	✓	A _a Contact ID	×
A _a Last Name	✓	A _a Last Name	×
A _a First Name	✓	A _a First Name	×
A _a Company	✓	A _a Account Name	×
A _a Converted	→	Search Columns...	Q
A _a Lead Source Campaign	✓	A _a Lead Source Campaign	×
A _a Lead Source	✓	A _a Lead Source	×
Industry	✓	A _a Industry	×

You have control over how to align fields across different objects, including custom fields without the same API name

Add Campaigns & Opportunities



Campaign join adds Campaign details (Name, Type) based on a Lookup field from Lead/Contact for a 'First Touch' Campaign (similar concept to Pardot Campaign but using Salesforce records)



Opportunity join adds Opportunity details, if they exist: created date, close date, amount, etc

Clean It Up



TRANSFORM Cleanup

1. Drop Columns
Drop columns: Id, Lead_Source_Campaign__c, IsConverted, Campaign.Id

2. Rename Campaign 'Name'
Change attributes for 'Campaign.Name' column: Label to 'First Touch Campaign', API Name to 'Campaign.Name'

3. Change 'Type' to 'Channel'
Change attributes for 'Campaign.Type' column: Label to 'Channel', API Name to 'Campaign.Type'

Preview Columns

A _a Last Name	A _a First Name	A _a Company	A _a Lead Source	A _a Industry	A _a Channel	A _a First Touch
King	Stephen	Stephen King Inc				
lead1	test	test	Email			
assignment1	test1	TEST				
LEAD	NEW	WILL IT SYNC				
Dangerfield	Rodney	Big Boats	Webinar		Webinar	2019-11-15 V
King	Stephen	Stephen King	Purchased List		Purchased List	2020-1-15 P
Noah	Trevor	The Daily Show	Webinar		Webinar	2020-4-15 V

Feature Settings

Analytics

Analytics

Allowlist

App Install History

Auto-Installed Apps

Getting Started

Settings

Sharing Inheritance

Coverage Assessment

Reports & Dashboards

SETUP Settings

Before you enable this setting, read the limitations in [Salesforce Sharing Inheritance](#)

☐ Use priority scheduling for recipe and dataflow requests

☐ Secure image sharing and downloading

☒ Include null values in CRM Analytics queries

Maximum number of hours an app can be in progress: 48

☐ Enable indexing of multivalued fields in CRM Analytics

☒ Enable Mobile Offline

Mobile offline allows you to download and securely store data on your device

A_a Channel

Profile Attributes

Profile results for 50-row sample

Valid Values

4692%

Missing Values

48%

Frequent Values

	0	5	10	15
Conference				15
Webinar			10	
Direct Mail		6		
Purchased List		6		
-		4		
Paid Search		3		
Trade Show		2		
Display Ad		2		
Inbound/Website		2		

You can modify values or metadata; pay attention to null values & your CRMA settings!

Final Recipe



Join Campaigns with Leads/Contacts to add 'First Touch' (acquisition) Campaign Name & Type

Add Opportunities

Add (join) Account fields to Contacts

Make sure to save in B2B Marketing Analytics App if others need access!

Recipe: Create Leads & Contacts Dataset

Write To: Dataset

*Dataset Display Label: Leads & Contacts with Source Campaign

Dataset API Name: Enter API name...

*App Location: B2B Marketing Analytics

Sharing Source: Search Salesforce objects...

Security Predicate: Apply row-level security to the target dataset by adding a predicate filter condition.

Preview Columns:

A ₁ Last Name	A ₂ First Name	A ₃ Company	A ₄ Lead Source	A ₅ Industry	A ₆ Channel	A ₇ First Touch Car
Feager	Patricia	International Shipping Co.	Trade Show		Trade Show	2019-12-2 Trade S
Macleod	Violet	Emerson Transport	Paid Search		Paid Search	2020-1-1 Paid Sear
Snyder	Kathy	TNR Corp.	Display Ad		Display Ad	2019-10-1 Banner /
James	Tom	Delphi Chemicals	Conference		Conference	2019-6-28 Confere
May	Norm	Greenwich Media	Inbound/Website		Inbound/Website	2020-1-15 Blog - M
Monaco	David	Blues Entertainment Corp.	Purchased List		Purchased List	2020-11-5 Purchas
Crenshaw	Carolyn	Ace Iron and Steel Inc.	Paid Search		Paid Search	2020-1-1 Paid Sear
Dadio Jr	Bill	Zenith Industrial Partners	Inbound/Website		Inbound/Website	2020-1-15 Blog - M
Luce	Eugena	Pacific Retail Group	Display Ad		Display Ad	2019-10-1 Banner /
Eberhard	Sandra	Highland Manufacturing Ltd.	Purchased List		Purchased List	2020-11-5 Purchas
Bair	Betty	American Banking Corp.	Purchased List		Purchased List	2020-11-5 Purchas
Owenby	Pamela	Partner Referral	Webinar		Webinar	2019-11-15 Webina
Boxer	Bertha	Inbound/Website	Webinar		Webinar	2019-11-15 Webina
McClure	Brenda	Inbound/Website	Webinar		Webinar	2019-11-15 Webina
Brownell	Shelly	Partner Referral	Webinar		Webinar	2019-11-15 Webina
Stumuller	Pat	Webinar	Webinar		Webinar	2019-11-15 Webina
Akin	Kristen	Partner Referral	Webinar		Webinar	2019-11-15 Webina
Young	Andy	Purchased List	Webinar		Webinar	2019-11-15 Webina
Rogers	Jack	Conference	Webinar		Webinar	2019-11-15 Webina
Gonzalez	Rose	Trade Show	Conference		Conference	2019-6-28 Confere
Forbes	Sean	Trade Show	Direct Mail		Direct Mail	2020-2-20 DM - P
Rogers	Jack	Inbound/Website	Conference		Conference	2019-6-28 Confere

Leads, Contacts, Opportunities



Account Name	Full Name	Lifecycle Stage	Became Known Date	First Engaged Date	Marketing Qualified Date	BD Working Date	Sales Accepted Date	Opportunity Name	Opportunity Created Date	Opportunity Close Date	Opportunity Stage	Amount	ARR	Became Client Date	
APB Hospitality	APB Hospitality	BD Working	2018-08-23	2020-04-21	2022-01-10	2022-01-17	-	-	-	-	N/A	0	0	-	
APB Hospitality	APB Hospitality	BD Working	2018-02-08	2019-06-28	2022-01-10	2022-01-17	-	-	-	-	N/A	0	0	-	
Arden Hotels	Arden Hotels	Sales Accepted	2022-01-11	2022-01-11	2022-01-11	2022-01-11	2022-01-18	Arden Hotels	2022-01-18	2022-12-16	Qualified	1,000,000	1,000,000	-	
Arden Hotels	Arden Hotels	Recycle	2022-01-11	2022-01-11	2022-01-11	2022-01-11	2022-01-12	Arden Hotels	2022-01-12	2022-03-29	Closed Lost	1,000,000	1,000,000	-	
Arden Hotels	Arden Hotels	Recycle	2022-01-11	2022-01-11	2022-01-11	2022-01-17	2022-01-18	Arden Hotels	2022-01-18	2022-03-25	Closed Lost	1,000,000	1,000,000	-	
Arden Hotels	Arden Hotels	BD Working	2017-04-12	2021-12-30	2022-01-11	2022-01-17	-	-	-	-	N/A	0	0	-	
California River Winery	California River Winery	Client	2022-01-13	2022-01-13	2022-01-12	2022-01-13	-	-	-	-	N/A	0	0	-	
Chadwick	Chadwick	BD Working	2022-01-12	2022-01-12	2022-01-12	2022-01-12	-	-	-	-	N/A	0	0	-	
Chadwick	Chadwick	Recycle	2021-05-10	2021-05-10	2022-01-12	2022-01-24	2022-01-24	Chadwick	2021-07-28	2022-01-12	Closed Lost	1,000,000	1,000,000	-	
Chadwick / Chadwick / Chadwick	Chadwick / Chadwick / Chadwick	Recycle	2022-01-12	2022-01-12	2022-01-12	2022-01-17	2022-01-17	Chadwick / Chadwick / Chadwick	2022-01-17	2022-01-24	Closed Lost	1,000,000	1,000,000	-	
Chadwick / Chadwick	Chadwick / Chadwick	Client	2021-06-15	2021-06-15	2022-01-13	2021-06-23	2022-02-15	-	-	-	N/A	0	0	2022-02-18	
Chadwick	Chadwick	BD Working	2020-09-25	What happened to MQLs from January?						-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	Recycle	2022-01-13							1-13	2022-02-16	Closed Lost	1,000,000	1,000,000	-
Chadwick / Chadwick	Chadwick / Chadwick	BD Working	2022-01-13							-	N/A	0	0	-	
Chadwick	Chadwick	BD Working	2021-08-08							-	N/A	0	0	-	
Chadwick	Chadwick	BD Working	2021-10-01	2021-10-01	2022-01-13	2022-01-20	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	BD Working	2020-05-01	2021-10-27	2022-01-13	2022-01-17	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	BD Working	2022-01-13	2022-01-13	2022-01-13	2022-01-13	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	Recycle	2022-01-13	2022-01-13	2022-01-13	2022-01-14	2022-01-18	Chadwick / Chadwick	2022-01-18	2022-03-29	Closed Lost	1,000,000	1,000,000	-	
Chadwick	Chadwick	BD Working	2022-01-13	2022-01-13	2022-01-13	2022-01-13	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	BD Working	2021-08-08	2021-08-12	2022-01-13	2022-01-20	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	Client	2021-12-22	2021-12-30	2022-01-14	2022-01-19	2022-01-19	-	-	-	N/A	0	0	2022-02-01	
Chadwick / Chadwick	Chadwick / Chadwick	BD Working	2022-01-12	2022-01-11	2022-01-14	2022-01-19	-	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	Sales Accepted	2022-01-12	2022-01-12	2022-01-14	2022-01-19	2022-08-02	-	-	-	N/A	0	0	-	
Chadwick / Chadwick	Chadwick / Chadwick	Client	2022-01-14	2022-01-14	2022-01-14	2022-01-14	2022-01-25	Chadwick / Chadwick	2022-01-25	2022-02-11	Closed Won	1,000,000	1,000,000	2022-02-11	

Campaign Influence

Problem: Sales reps don't create Opportunity Contact Roles; I want more Campaign Influence models without a lot of Salesforce configuration

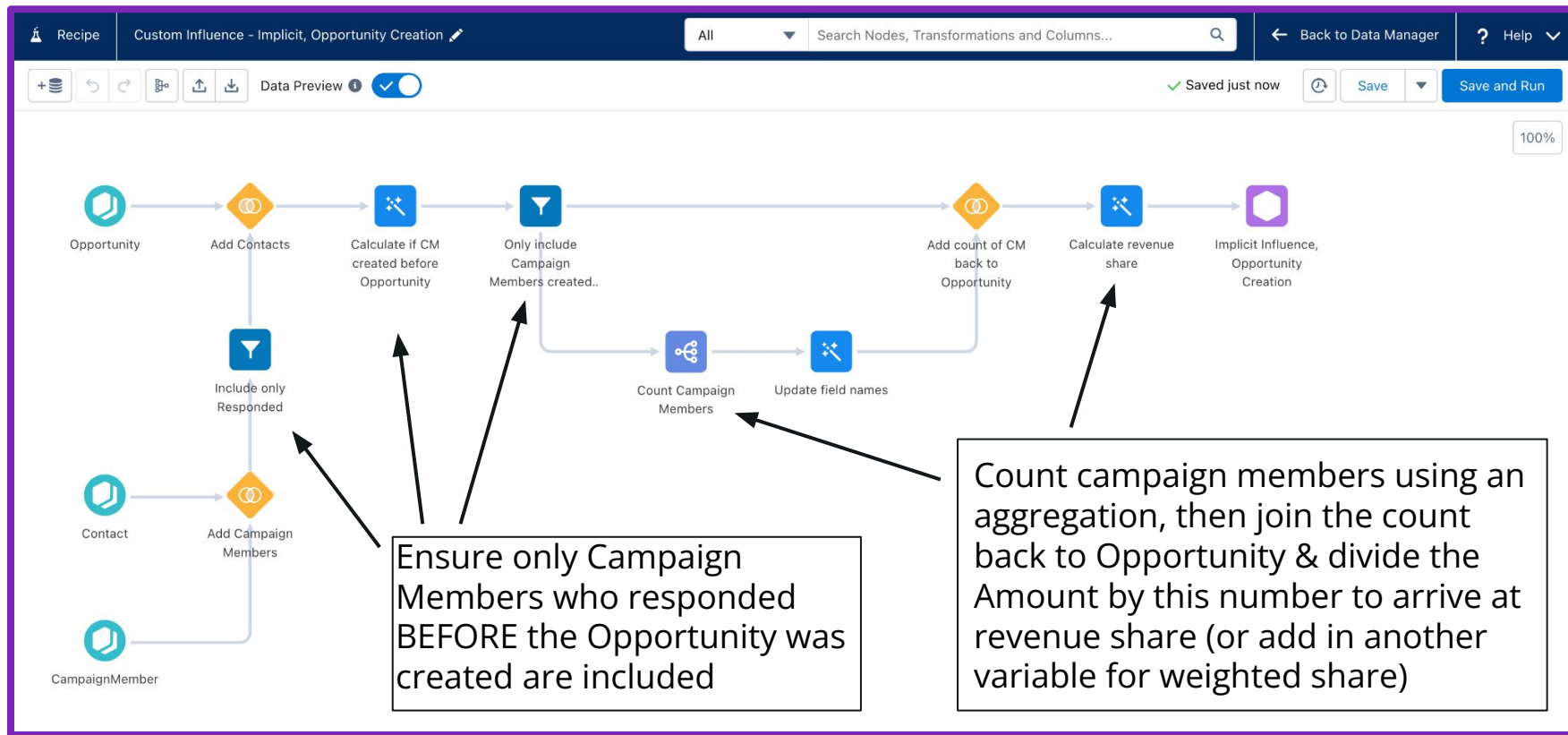
Solution: Use CRMA to create custom Campaign Influence models without Salesforce automation, and/or which don't rely on OCRs

Pipeline Creation Dataset Design



1. Only use 'Responded' Campaign Members
 - a. ANY Contact at the Account ('implicit' influence)
2. Calculate days between First Responded Date vs Opportunity Created Date
 - a. Remove any Campaign Members responded AFTER the Opportunity was created
3. Divide Amount of Opportunity by count of Campaign Members to arrive at revenue share
 - a. BONUS: change touchpoint weights!
4. Aggregate to any meaningful level
 - a. Channel (Campaign Type), Campaign, Parent Campaign
5. Append this dataset to other models and use dashboard filters to toggle between them

Recipe: Pipeline Creation



Weighted Engagement

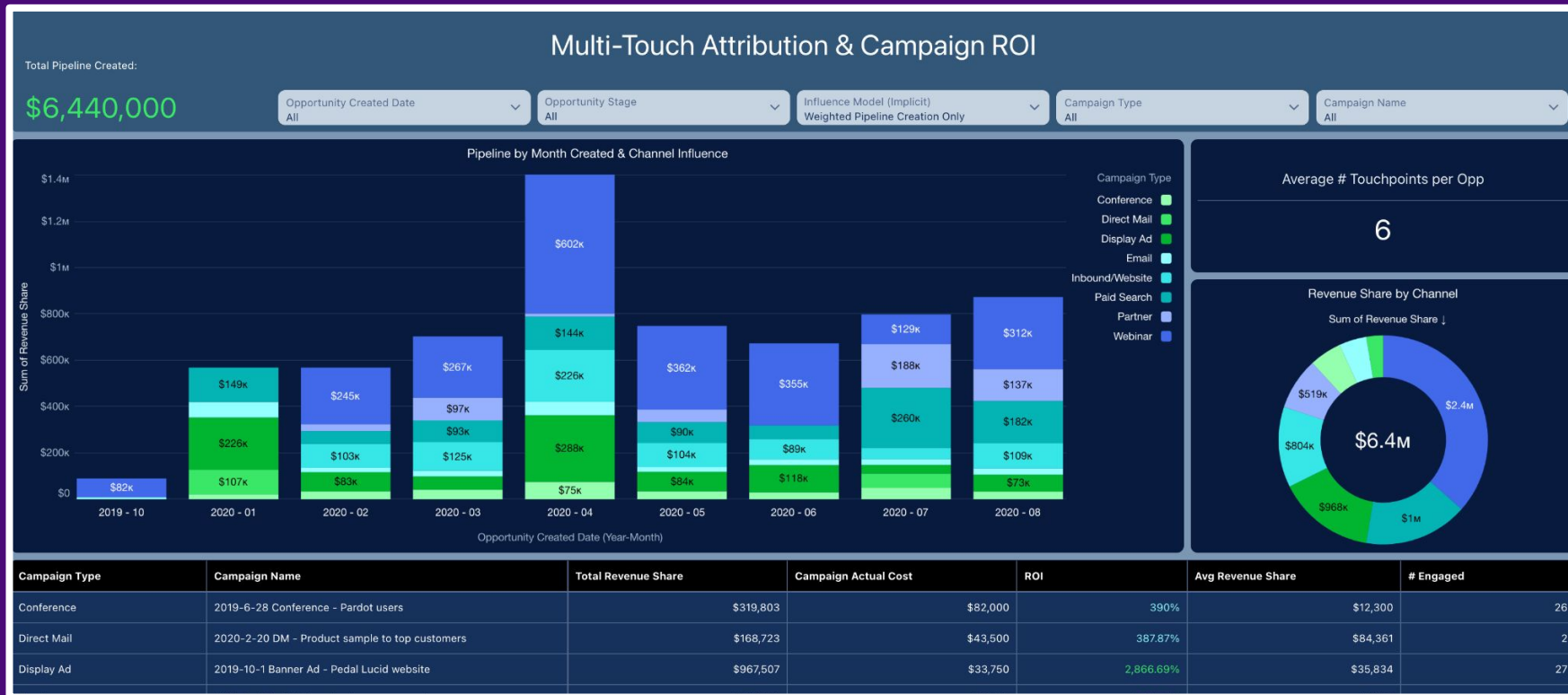


#	Campaign Influence Model	Campaign Name	Amount	Weighted_Engagement_c_SUM	Weighted Engagement	Revenue Share	Opportunity ID ↓
1	Weighted Influence - All	2020-2-20 DM - Product sample to top customers	260,000	42	10	61,905	0063i0000076oNEAAY
2	Weighted Influence - All	2019-9-1 Email Fall product announcement	260,000	42	2	12,381	0063i0000076oNEAAY
3	Weighted Influence - All	2020-1-1 Partner - Cloud SEO Referrals	260,000	42	20	123,810	0063i0000076oNEAAY
4	Weighted Influence - All	2020-1-1 Paid Search - Pedal Lucid Branded	260,000	42	10	61,905	0063i0000076oNEAAY
5	Weighted Influence - All	2020-1-15 Webinar - Product tease	50,000	90	20	11,111	0063i0000076n6JAAQ
6	Weighted Influence - All	2020-1-15 Blog - Marketing automation	50,000	90	15	8,333	0063i0000076n6JAAQ
7	Weighted Influence - All	2020-1-1 Partner - Cloud SEO Referrals	50,000	90	20	11,111	0063i0000076n6JAAQ
8	Weighted Influence - All	2019-11-15 Webinar - Multi-touch attribution	50,000	90	20	11,111	0063i0000076n6JAAQ
9	Weighted Influence - All	2019-6-28 Conference - Pardot users	50,000	90	5	2,778	0063i0000076n6JAAQ
10	Weighted Influence - All	2020-1-1 Paid Search - Pardot Analytics Consulting	50,000	90	10	5,556	0063i0000076n6JAAQ
11	Weighted Influence - All	2020-1-15 Webinar - Product tease	50,000	90	20	4,444	0063i000004TdSyAAK
12	Weighted Influence - All	2020-1-15 Blog - Marketing automation	50,000	90	15	3,333	0063i000004TdSyAAK
13	Weighted Influence - All	2020-1-1 Partner - Cloud SEO Referrals	50,000	90	20	4,444	0063i000004TdSyAAK
14	Weighted Influence - All	2019-11-15 Webinar - Multi-touch attribution	50,000	90	20	4,444	0063i000004TdSyAAK

Calculate Revenue Share by weighting different Campaign Types differently

Dashboard View:

Marketing Influence on Pipeline Creation

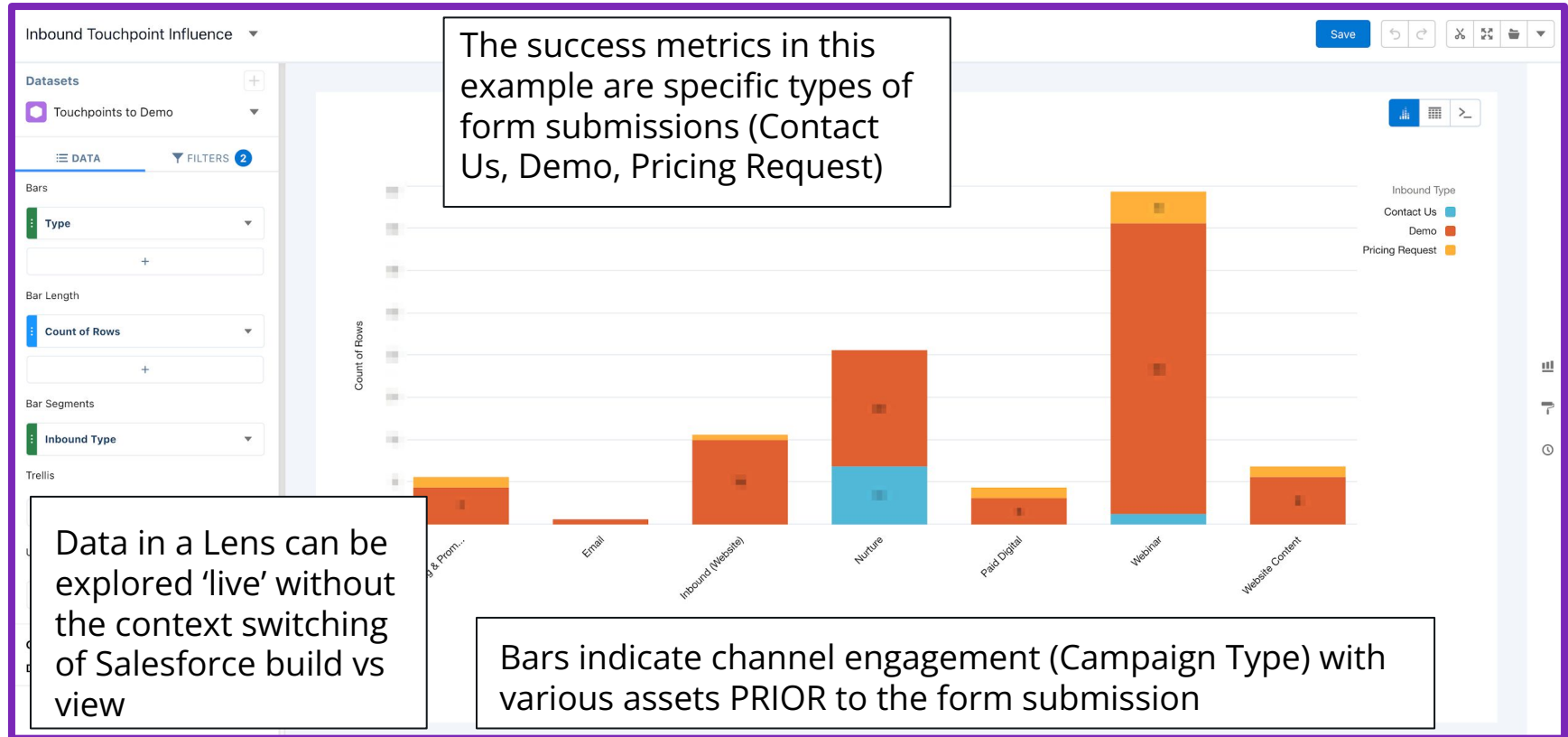


Other Conversions

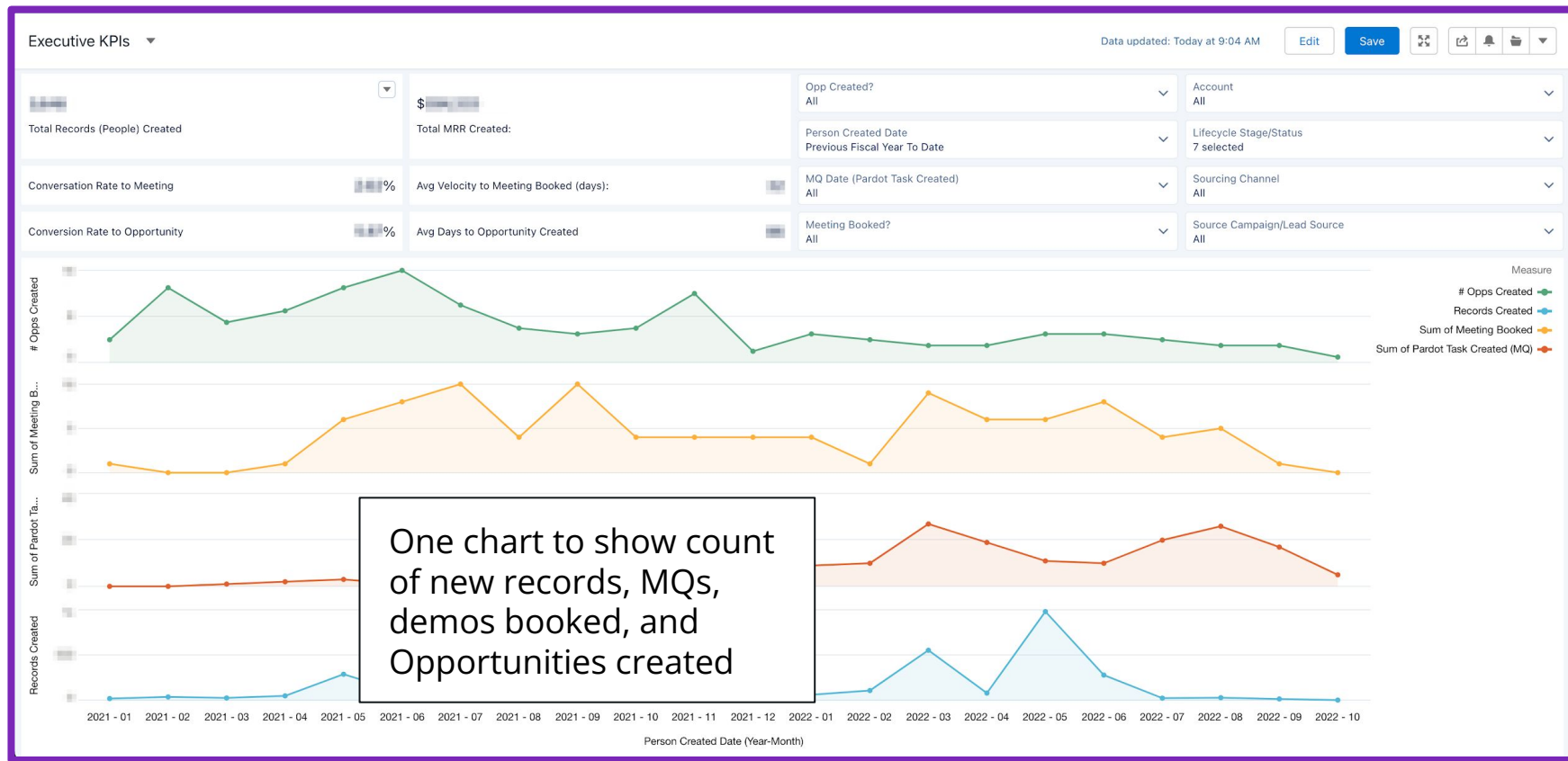
Problem: We have more key milestones in the sales process than are easily supported with OOTB Lead & Opportunity metrics; for example, demos or meetings booked post MQ but pre-Opportunity

Solution: CRMA dashboard that isn't limited by Salesforce reporting features

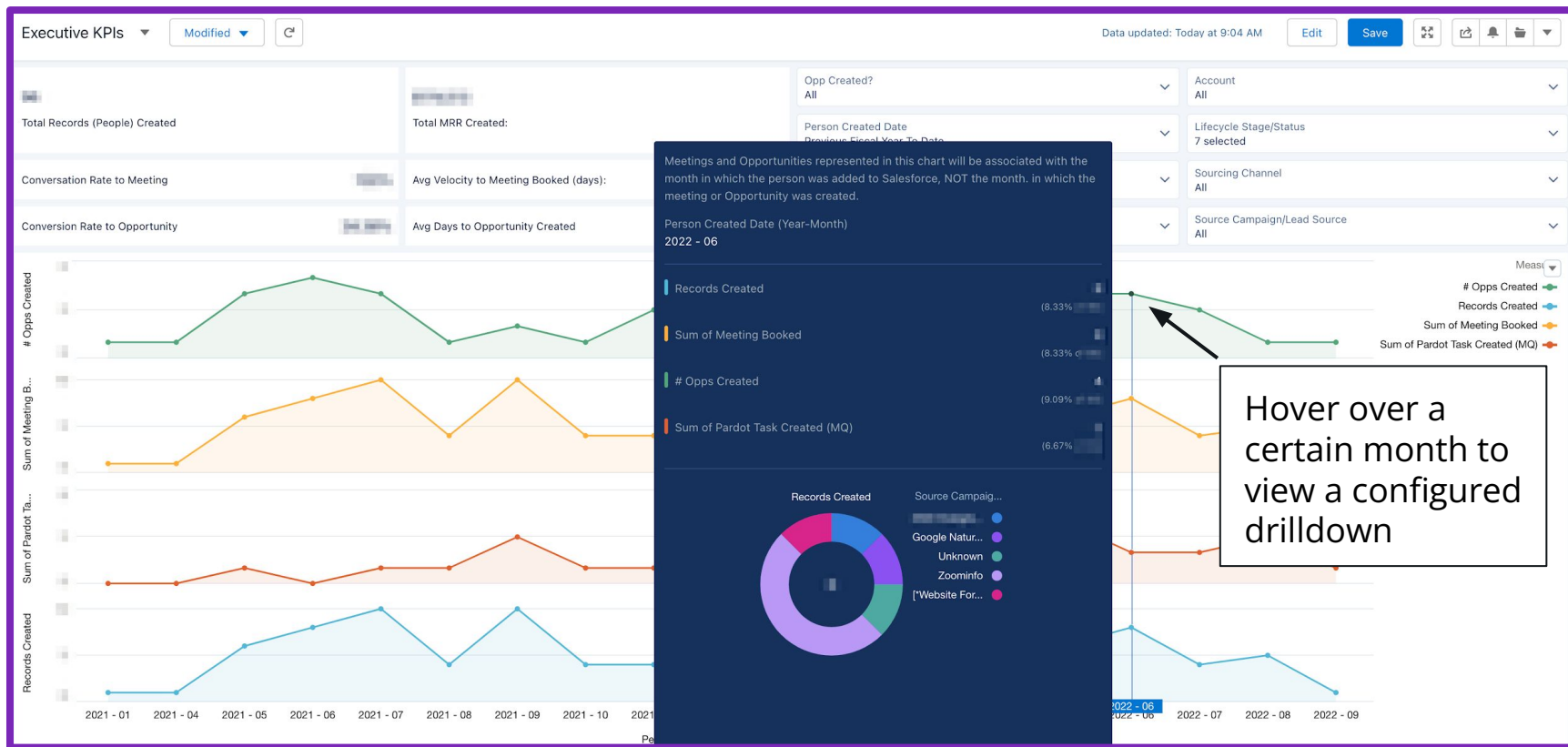
Engagement Prior to Form Submission



Acquisition > MQL > Demo > SQL



Acquisition > MQL > Demo > SQL



Acquisition > MQL > Demo > SQL



- Consolidated place to tell the story of 'what happened' after record acquisition
- Lots of ways to slice the data using filters
- Hover to view monthly breakdown by campaign

Heads up:

- Dates & visuals
 - In this chart, dates all tie back to acquisition, NOT the date of the MQ/demo/opportunity
- Aggregations & CRMA behavior
 - We're using both person & Opportunity data; be careful not to double-count data from some objects

Key Takeaways



Wins:

- Powerful, included with most MCAE editions
- Fully functional for small teams or to build proof-of-concept
- Gateway to more sophisticated analytics

Gotchas:

- Licensing doesn't scale well
- Null values
- Data scheduling and refreshes
- Requires more care & attention than Salesforce reports (aggregations)



Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!



Duncan McGovern
duncan@pedallucid.com