Turbo Charge Your Analytics in Salesforce.com

Full Circle CRM
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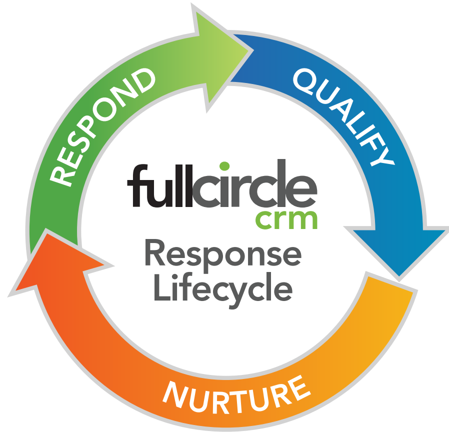
Full Circle CRM Response Management is a native Salesforce application that provides customers with highly configurable Lead lifecycle management and enhanced analytics. With Full Circle CRM, marketers can finally understand campaign performance and Marketing's contribution to revenue. In this document, we'll explore how marketers can answer key questions to drive revenue when using Full Circle CRM.



Campaign Performance: What was the quality of the responses?

> How many net new names did this Campaign generate?

> How many responses were already in the house list?

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NOT POSSIBLE

Marketers cannot report the number of new names a specific Campaign generated. The closest count is the number of new Leads created over time by Lead source.

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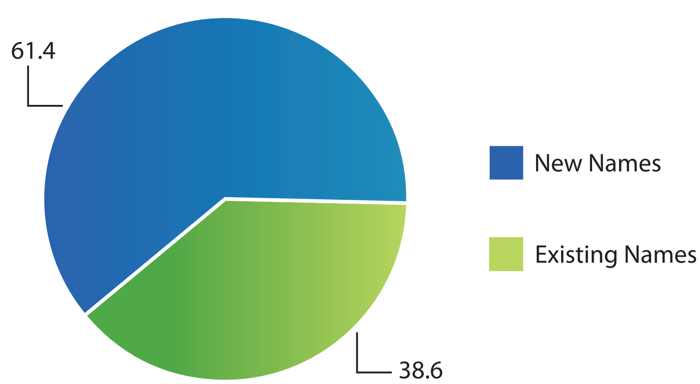
COMPLETE VISIBILITY

Marketers get complete visibility into new names generated by Campaign that includes both Lead & Contact records. Slice and dice by any attribute on the Campaign.

All Responses—% of New Names



Who responded to this campaign? Are they my target?

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PARTIAL/INACCURATE

Marketers can report on the members most recent attributes, but not the attributes that were present when the member responded.

For example – Six months ago the individual was a Lead record and part of a target account list.

Today he or she is a Contact record. And since the company changed the entire target account list the individual is no longer a target. In sum, a report run today on that Campaign will not reflect the historic quality of that response.

What type are they now?

By Member Type

Member Type	Record Count
Contact	30
Lead	4
Total	34

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COMPLETE VISIBILITY

Full Circle CRM provides complete historical data on member responses:

Were they a Lead or Contact?

Were they part of a targeted account?

Marketers can capture additional key metrics to slice and dice the responses and report on that data based on the respondent's condition at the time he or she responded.

What type were they when they responded?

By Member Type on Create

Member Type On Create	Record Count
Lead	25
Contact	9
Total	34

What was the outcome of the responses generated? Did Sales follow up?

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PARTIAL/INACCURATE

Marketers can report on the Lead status as it exists today, but not on the status as it was at the time the response came in and was processed. Additionally, Contact records do not have a status value so they are omitted from any status reporting.

Leads by Lead Status

Lead Status	Record Count
Attempting Contact	1
Working	1
Nurture/Marketing	2
Total	4

** Shows all leads that have responded to the campaign and the CURRENT lead status, Will not display converted leads.*

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COMPLETE VISIBILITY

Full Circle CRM tracks all responses across both Leads and Contacts allowing marketers to report on the outcome by Campaign.

Responses by Status

Response Status	Record Count
Open - Not Contacted	1
Disqualified	3
Qualified - New Opportunity	4
Resolved - Already Engaged	9
Resolved - No Action Required	14
Resolved - Opportunity Won	3
Total	34

**Shows all leads & contacts that have responded to the campaign and the resulting status of that engagement.*

What is the ROI of my Campaign?

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PARTIAL/INACCURATE

Marketers often don't know that Salesforce users have six ways to create Opportunities and only two of those ways associate a Campaign with the Opportunity.

Even more interesting, the Campaign associated to the Opportunity is always the last Campaign that has been associated to the record but it doesn't necessarily have to be a response. For example, an outbound email campaign with a member status of "sent" that has bounced back could be credited for the full ROI on the Opportunity.

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COMPLETE VISIBILITY

Full Circle CRM sets the Campaign that drove rep engagement as the primary Campaign for ROI figures. Full Circle CRM also captures first and last touch, but only for actual campaign responses – forget that bounced outbound email campaign.

Full Circle CRM can support full Campaign metrics for all Opportunities, requiring that Opportunities are created from individuals and that a Campaign, either Sales or Marketing, is present for every Opportunity. Or, we can simply clear off the faulty data when Campaign credit should not be given.

Did my Campaign influence revenue?

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PARTIAL/INACCURATE

Marketers often don't know that Salesforce has a limited influence model, which attributes 100% of the sale to every Campaign within the global influence criteria. Many organizations want to calculate revenue influence in a more flexible manner and want the total influence not to exceed the total revenue generated.

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COMPLETE VISIBILITY

Full Circle CRM provides a revenue influence framework that marketers can use to calculate influence based on their company's criteria. Full Circle CRM leverages the Opportunity amount and distributes it across all Campaign Members that influenced the deal based on a highly configurable weighting system. Using this mechanism, marketers can slice and dice influenced deals by Campaign, Opportunity type, Account segments, and any other attribute on the Campaign, Contact & Account record.

Top Performing Campaigns By Influenced Revenue

Campaign Name	Sum of Influence Revenue
Security Campaign - 2012 - Secure Data Whitepaper	$375,033
Core Campaigns - 2012 - Download - 30 Day Trial B	$267,440
Sales Campaign - 2012 - Inbound Call	$144,684
Core Campaigns - 2012 - Download - 30 day Trial	$140,190
Security Campaign - 2012 - Banner Ads - TechTarget	$111,364

Did anyone respond to my Campaign more than once?

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PARTIAL/INACCURATE

Salesforce doesn't support more than one Campaign membership per person. If someone fills out a "contact us" form in January of 2010 and then fills out another contact us form in December of 2011, that second response will be lost.

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COMPLETE VISIBILITY/EXTENSIBLE

Full Circle CRM allows marketers to establish rules for repeat responses and captures the additional response by creating a repeat Campaign. Marketers can see how many of their Campaigns are engaged by individuals more than once.

Marketing Performance: What is the big picture?

What is my inquiry-to-close funnel?

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PARTIAL/INACCURATE

Funnel stages like Marketing Qualified Lead (MQL) or Sales Accepted Lead (SAL) are typically captured on the related Lead and Contact records and get overwritten an individual moves through the lifecycle over time. Not only does overwriting information result in inaccurate data but also the inability to understand what specific Campaign prompted the Lead or Contact to move through the funnel stages at what time.

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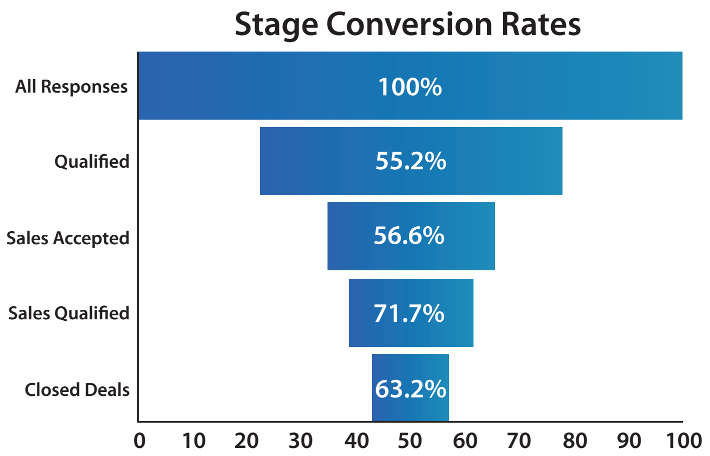
COMPLETE VISIBILITY

Marketers can use the Full Circle CRM Response Intelligence UI to view funnel stage conversion rates or they can generate custom funnels using standard Salesforce reports. Easily slice and dice funnels by customer segments, Campaign, timeframe and more.



What is the velocity of my funnel?

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PARTIAL/INACCURATE

Velocity metrics show how long it takes responses to progress from one stage in the funnel to the next. Because Salesforce overwrites the funnel stage information on the related Lead or Contact velocity reporting is inaccurate and limited to segmentation by the data that is currently on the Lead or Contact.

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COMPLETE VISIBILITY

Since progression in each stage of the funnel is date stamped and synchronized to each individual response marketers will find it easy to slice and dice velocity metrics in many different ways such as by Campaign, job function, industry, target accounts, etc.

Funnel Velocity

Avg # Days From MQR to SAR:	20
Avg # Days From SAR to SQR:	10
Avg # Days From SQR to Closed Won:	1

Operations: How well are we adhering to our process?

How many responses did Sales engage with over time?

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NOT POSSIBLE

Salesforce users know what Leads & Contacts a rep owns today—but not how many each rep engages with over time.

The image below shows Leads in the system by owner. This data reflects the Leads they own today, but not how many they have processed in the past that have been re-assigned .

Additionally, marketers are limited to looking at the Lead database and lose all visibility in to how many responses from the Contact database also require follow-up.

Leads By Owner

Lead Owner	Record Count
Jack PassiveSD	17
Ronald ActiveAR	1
Sally Sales Person	37
Total	55

Shows leads in the system by owner.

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COMPLETE VISIBILITY

With Full Circle CRM marketers can see how many responses were sent to Sales and the outcome of each response. In addition, management can see response aging to determine whether Sales reps are meeting their Service Level Agreement (SLA).

The image below shows actionable Leads and Contacts that were assigned to reps for follow-up, regardless of the current Owner:

Responses Assigned For Follow Up (Volume)

First Owner Assigned	Record Count
Bonnie Crater	1
Jack PassiveSD	26
John ActiveSD	7
Roan Bear	53
Ronald ActiveAR	1
Sally Sales Person	45
Total	133

Why were responses disqualified?

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PARTIAL/LIMITED

Today Salesforce gives marketers visibility in to the current Lead status and the related disqualified reason but that data will be lost when the Lead is re-opened. Because the disqualified reason is a static field on the Lead record it is impossible for marketers to understand what specific Campaign response has been disqualified. Additionally, marketers lose this data all together on the Contact since it doesn't have a status to capture engagement.

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COMPLETE VISIBILITY

Using a disqualified reason on Leads and Contacts, Full Circle CRM captures that data on the Campaign Member so marketers can identify why a specific Campaign response was disqualified. This functionality supports a feedback loop between Sales and Marketing that can allow the refinement of qualification criteria and scoring over time.

Disqualified Reason: Bad Contact Information **(3 records)**
Disqualified Reason: Student **(2 records)**
Disqualified Reason: Not Our Demographic **(4 records)**
Disqualified Reason: Competitor **(2 records)**
Disqualified Reason: No Immediate Need **(3 records)**
Disqualified Reason: No Budget **(5 records)**
Grand Totals (19 records)

Is Sales meeting their Service Level Agreement (SLA)?

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PARTIAL/LIMITED

With Salesforce marketers can get a partial view of Leads currently owned by Sales by adding customization to track status age. This visibility doesn't relate to the follow-up on a specific campaign response as Leads can engage with different campaigns over time.

Sales SLA attainment on Contacts with responses is not visible at all.

In organizations that pass Opportunities, management cannot see Opportunity stage progression without further customization.

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COMPLETE VISIBILITY

Because Full Circle CRM tracks not only status age but also Funnel Stage, marketers can report on SLAs even if they differ for each stage of the funnel. You can report on SLA attainment across Leads & Contacts as well as Opportunity stages that relate to funnel stages.

Neglected Responses By Owner

Lead/Contact Owner	Record Count
Roan Bear	17
Sally Sales Person	13
Jack PassiveSD	4
Bonnie Crater	3

About Full Circle CRM

Full Circle CRM gives marketers and Sales a full response lifecycle management solution, ensures every deal is attributed to the right campaign so you can get accurate ROI, and answers all your Marketing questions in one place. Our cloud-based product is built 100% on Salesforce.com and is pre-integrated with the Leading Marketing automation solutions. All Marketing data is in Salesforce.com and so are the answers.

Founded by former Salesforce.com executives, product managers, and Marketing automation specialists – we know what it takes to run a successful Marketing organization. We are passionate about giving all marketers the answers they need to plan with confidence and grow revenue.

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> View a five-minute demo: **fullcirclecrm.com/demo5**

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