

A woman with long brown hair is smiling and looking to the right. She is wearing a grey blazer over a light-colored top. Her hand is resting near her chin, and she is wearing a ring. In the background, another woman with blonde hair is looking down, possibly at a laptop or document. The setting appears to be a professional meeting or office environment.

# 4 Ways to Optimize Your Marketing Spend Using Campaign Attribution



# Introductions



Alison Rouse  
Sr. Business Analyst  
Full Circle Insights

# Agenda

Gain an inside view of Spiral Inc., a fictitious company with real marketing challenges. See how they analyzed Campaign Attribution data to optimize their marketing spend.

# About Spiral



## BACKGROUND

**Company Name:** Spiral Inc.

**Company Size:** 50 employees

**Product:** BackOffice Restaurant Hardware & Software

**Customers:** Variety - Restaurant owners /managers, operations managers

**Segment:** Small business (mom & pop) to Corporate (chain)

**Number of Customers:** 124

**Revenue generation:** Sales and renewals

# About Spiral's Marketer & Challenges



## BACKGROUND

**Name & Role at Spiral:** Dina Rogers, Director of Marketing Operations

**Implemented FCI Response Management w/ Campaign Attribution and wants to optimize their marketing spend using the data.**

**Needs to optimize spend in several key areas:**

- Accelerate velocity of stagnant hardware Opportunities
- Increase Target Account Acquisition
- Identify key lead generation segments & increase lead gen
- Re-allocate spend in costly events channel

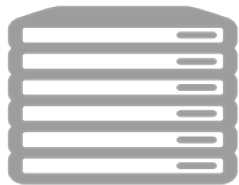


# About Spiral's Campaign Attribution Models



**Model 1: First Touch (Software)**

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**Model 2: Weighted (Hardware)**

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**Model 3: Weighted (Software)**

# Challenge #1: Stagnant Opportunities

- Identify marketing channels that are most successful at pushing hardware Opportunities to close
- Make adjustments to marketing mix based on findings



# Challenge #1: Stagnant Opportunities

Filtered By: [Edit](#)  
**Has Influence Model 2** equals **True** [Clear](#)  
 AND **Campaign: Campaign Sourced By** equals **Marketing** [Clear](#)  
 AND **Opportunity Timeframe** equals **Opportunity** [Clear](#)  
 AND **Campaign: Asset Type** equals **Webinar,Infographic,Whitepaper,Comparison Guide,E-Book,Brochure** [Clear](#)  
 AND **Opportunity: Type** equals **Hardware** [Clear](#)  
 AND **Opportunity: Won** equals **True** [Clear](#)  
 AND **Response Date** less or equal **11/1/2016** [Clear](#)

Grouped By: Campaign: Type  
 Sorted By:

	Opportunity: Amount Won	Opportunity: Count	Closed Op Revenue Model2	Opportunity: Velocity Won
<input type="checkbox"/> <b>Campaign: Type: Online Advertising (61 records)</b>	\$18,965,000.00	46	\$2,300,514.3236	avg 39
<input type="checkbox"/> <b>Campaign: Type: Content Syndication (28 records)</b>	\$9,733,762.50	25	\$1,165,780.2553	avg 53
<input type="checkbox"/> <b>Campaign: Type: Website (155 records)</b>	\$32,261,162.50	99	\$5,443,865.8351	avg 52
<b>Grand Totals (244 records)</b>	<b>\$39,520,412.50</b>	<b>117</b>	<b>\$8,910,160.4140</b>	<b>avg 53</b>

# Challenge #1: Stagnant Opportunities

Filtered By: [Edit](#)

Has Influence Model 2 equals True [Clear](#)  
 AND Campaign: Campaign Sourced By equals Marketing [Clear](#)  
 AND Opportunity Timeframe equals Opportunity [Clear](#)  
 AND Campaign: Asset Type equals Webinar,Infographic,Whitepaper,Comparison Guide,E-Book,Brochure [Clear](#)  
 AND Opportunity: Type equals Hardware [Clear](#)  
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Grouped By: Campaign: Type  
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**Actionable Insight:** Online Advertising is effective on hardware opportunities that have a shorter average velocity between SQL and Closed Won, particularly re-marketing. Re-invest in Re-Marketing online advertising in the hardware sector.

# Challenge #1: Stagnant Opportunities

	Campaign: Actual Cost	Closed Op Revenue Model2	Closed Op Revenue Model3	Opportunity: Count	Weighted Total	Influence Conversion
<input type="checkbox"/> Campaign: Type: Conference (2,304 records)	\$200,000	\$151,175.7877	\$193,320.5825	255	\$444,258.43	49.02%
<input type="checkbox"/> Campaign: Type: Other (5,862 records)	\$2,238,799,680	\$1,608,120.4183	\$570,924.1061	361	\$2,566,555.03	55.40%
<input type="checkbox"/> Campaign: Type: Online Advertising (2,480 records)	\$215,064,103	\$489,356.5086	\$202,777.8206	273	\$839,517.71	31.00%
<input type="checkbox"/> Campaign: Type: Content Syndication (828 records)	\$63,108,974	\$161,846.6135	\$78,495.8355	234	\$301,875.84	47.86%
<input type="checkbox"/> Campaign: Type: Print Advertising (1,234 records)	\$1,762,820,513	\$71,854.1667	\$134,692.7832	224	\$291,720.52	47.32%
<input type="checkbox"/> Campaign: Type: Website (7,334 records)	\$127,275,641	\$779,231.1879	\$781,750.2039	341	\$1,999,623.85	53.08%
<input type="checkbox"/> Campaign: Type: Referral (1,711 records)	\$881,445,512	\$216,120.3175	\$120,280.6681	218	\$420,411.17	47.25%
<b>Grand Totals (21,753 records)</b>	<b>\$5,288,714,423</b>	<b>\$3,477,705.0000</b>	<b>\$2,082,242.0000</b>	<b>405</b>	<b>\$6,863,962.55</b>	<b>57.28%</b>

# Challenge #1: Stagnant Opportunities

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**Actionable Insight:** Before shifting budget away from a marketing channel, drill into the data to understand if the channel may be effective for specific segments (i.e., hardware).

# Challenge #1: Key Fields

- Campaign Type
- Opportunity Timeframe
- Velocity Won

# Challenge #1: Key Fields

- **Campaign Type:** A standard field on the Campaign object that allows marketers to categorize campaigns by channel
- Opportunity Timeframe
- Velocity Won

# Challenge #1: Key Fields

- Campaign Type
- **Opportunity Timeframe:** A Full Circle formula field on the Campaign Influence Detail object referring to whether that response came in Pre-Opportunity or during the Opportunity
- Velocity Won

Data type	Formula to
	<code>IF(FCRM__Response_Date__c &lt; FCRM__Opportunity__r.CreatedDate , "Pre-Opportunity", "Opportunity")</code>

# Challenge #1: Key Fields

- Campaign Type
- Opportunity Timeframe
- **Velocity Won:** A Full Circle formula field on the Opportunity that calculates the # of days between Opportunity Creation and the Close Date for Closed Won Opportunities

```
/* if closed date is after create date, the amount of time between create and closed for won deals */  
IF(IsWon && DATEVALUE(CreatedDate)<=CloseDate, CloseDate - DATEVALUE(CreatedDate), NULL)
```

# Challenge #2: Target Account Acquisition

- Use the “Deal Explorer” to:
  - Identify any trends on Target Accounts (Target Accounts defined as large restaurant chains w/ more than \$20M in annual revenue)
  - Based on findings repeat successful marketing activities to acquire additional Target Accounts

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #1

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **Darden Restaurants - Terminals**

Account Owner Chris Toonces

Close Date 11/26/2016

Amount \$5,000,000.00

Originating Contact Bill Darden

First Campaign Touch Food & Wine Afficionado

Primary Campaign Source Cooking for a Crowd Cheat Sheet 2015

Last Campaign Touch Cooking for a Crowd Cheat Sheet 2015

[Return to Opportunity](#)

**Profile listing**

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Gift Gard Program Webinar</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Website - Terminal Comparison Guide</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Cooking for a Crowd Cheat Sheet 2015</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Facebook Ad - Restaurant Management E-Book</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Food &amp; Wine Afficionado</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #1

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **Darden Restaurants - Terminals**

Account Owner [Chris Toonces](#)

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Amount \$5,000,000.00

Originating Contact [Bill Darden](#)

First Campaign Touch [Food & Wine Afficionado](#)

Primary Campaign Source [Cooking for a Crowd Cheat Sheet 2015](#)

Last Campaign Touch [Cooking for a Crowd Cheat Sheet 2015](#)

[Return to Opportunity](#)

Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<a href="#">Gift Gard Program Webinar</a>	Campaign	<a href="#">Chris Chang</a>	Chief Information Officer	Technical Buyer	SQO
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11/26/2016	<a href="#">Cooking for a Crowd Cheat Sheet 2015</a>	Campaign	<a href="#">Bill Darden</a>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<a href="#">Facebook Ad - Restaurant Management E-Book</a>	Campaign	<a href="#">Bill Darden</a>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<a href="#">Food &amp; Wine Afficionado</a>	Campaign	<a href="#">Bill Darden</a>		Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #2

 Full Circle Deal Explorer

[Help for this Page](#) 

**Opportunity Name:** DineEquity - Terminals

**Account Owner** Chris Toonces  
**Close Date** 11/26/2016  
**Amount** \$4,300,000.00

**Originating Contact** Julia Stewart  
**First Campaign Touch** Motel & Restaurant Supply Show 2015  
**Primary Campaign Source** Sales Generated  
**Last Campaign Touch** Sales Generated

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**Profile listing**

**Campaign Influence**

**Visualization**

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Dine Time - Partner Referrals</u>	Campaign	<u>Richard Dahl</u>	Lead Director	Influencer	Solution
11/26/2016	<u>The Restaurant Forum - Terminal Comparison Guide</u>	Campaign	<u>Adrian Butler</u>	CIO	Technical Buyer	Solution
11/26/2016	<u>Sales Generated</u>	Campaign	<u>Julia Stewart</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Motel &amp; Restaurant Supply Show 2015</u>	Campaign	<u>Julia Stewart</u>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #2

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **DineEquity - Terminals**

Account Owner [Chris Toonces](#)  
Close Date 11/26/2016  
Amount \$4,300,000.00

Originating Contact [Julia Stewart](#)  
First Campaign Touch [Motel & Restaurant Supply Show 2015](#)  
Primary Campaign Source [Sales Generated](#)  
Last Campaign Touch [Sales Generated](#)

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Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	Dine Time - Partner Referrals	Campaign	<a href="#">Richard Dahl</a>	Lead Director	Influencer	Solution
11/26/2016	<a href="#">The Restaurant Forum - Terminal Comparison Guide</a>	Campaign	<a href="#">Adrian Butler</a>	CIO	Technical Buyer	Solution
11/26/2016	<a href="#">Sales Generated</a>	Campaign	<a href="#">Julia Stewart</a>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<a href="#">Motel &amp; Restaurant Supply Show 2015</a>	Campaign	<a href="#">Julia Stewart</a>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #3

 Full Circle Deal Explorer

[Help for this Page](#) 

**Opportunity Name:** Sentinal - Terminals

**Account Owner** Chris Toonces

**Close Date** 11/26/2016

**Amount** \$4,350,000.00

**Originating Contact** Douglas Levy

**First Campaign Touch** Inbound Call

**Primary Campaign Source** Inbound Call

**Last Campaign Touch** BusinessWeek Ad

[Return to Opportunity](#)

**Profile listing**

**Campaign Influence**

**Visualization**

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Website - Terminal Comparison Guide</u>	Campaign	<u>Sandy Tam</u>	Controller	Technical Buyer	SQO
11/26/2016	<u>Facebook Ad - Restaurant Management E-Book</u>	Campaign	<u>Sandy Tam</u>	Controller	Technical Buyer	SQO
11/26/2016	<u>BusinessWeek Ad</u>	Campaign	<u>Douglas Levy</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Inbound Call</u>	Campaign	<u>Douglas Levy</u>		Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #3

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **Sentinal - Terminals**

Account Owner [Chris Toonces](#)

Close Date 11/26/2016

Amount \$4,350,000.00

Originating Contact [Douglas Levy](#)

First Campaign Touch [Inbound Call](#)

Primary Campaign Source [Inbound Call](#)

Last Campaign Touch [BusinessWeek Ad](#)

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Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<a href="#">Website - Terminal Comparison Guide</a>	Campaign	<a href="#">Sandy Tam</a>	Controller	Technical Buyer	SQO
11/26/2016	<a href="#">Facebook Ad - Restaurant Management E-Book</a>	Campaign	<a href="#">Sandy Tam</a>	Controller	Technical Buyer	SQO
11/26/2016	<a href="#">BusinessWeek Ad</a>	Campaign	<a href="#">Douglas Levy</a>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<a href="#">Inbound Call</a>	Campaign	<a href="#">Douglas Levy</a>		Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Lost Opportunity – Example #1

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **Buffalo Wild Wings - Terminals**

Account Owner Chris Toonces

Close Date 11/26/2016

Originating Contact Sally Smith

First Campaign Touch International Hotel, Motel & Restaurant Show 2015

Primary Campaign Source Google Ad - Restaurant Management E-Book

Last Campaign Touch Google Ad - Restaurant Management E-Book

[Return to Opportunity](#)

Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Facebook Ad - Top 10 Reasons Infographic</u>	Campaign	<u>Alexander Ware</u>	CFO	Influencer	Solution
11/26/2016	<u>Google Ad - Restaurant Management E-Book</u>	Campaign	<u>Sally Smith</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>International Hotel, Motel &amp; Restaurant Show 2015</u>	Campaign	<u>Sally Smith</u>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Lost Opportunity – Example #1

 Full Circle Deal Explorer

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Opportunity Name: **Buffalo Wild Wings - Terminals**

Account Owner [Chris Toonces](#)

Close Date 11/26/2016

Originating Contact [Sally Smith](#)

First Campaign Touch [International Hotel, Motel & Restaurant Show 2015](#)

Primary Campaign Source [Google Ad - Restaurant Management E-Book](#)

Last Campaign Touch [Google Ad - Restaurant Management E-Book](#)

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Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<a href="#">Facebook Ad - Top 10 Reasons Infographic</a>	Campaign	<a href="#">Alexander Ware</a>	CFO	Influencer	Solution
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11/26/2016	<a href="#">International Hotel, Motel &amp; Restaurant Show 2015</a>	Campaign	<a href="#">Sally Smith</a>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Lost Opportunity – Example #2

 Full Circle Deal Explorer

[Help for this Page](#) 

Opportunity Name: **Brinker - Terminals**

Account Owner Chris Toonces  
Close Date 11/26/2016  
Amount \$6,500,000.00

Originating Contact Wyman Roberts  
First Campaign Touch Sales Generated  
Primary Campaign Source Sales Generated  
Last Campaign Touch Facebook Ad - Top 10 Reasons Infographic

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**Profile listing**

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Inbound Call</u>	Campaign	<u>Douglas Brooks</u>	Chairman	Evaluator	SQO
11/26/2016	<u>Gift Gard Program Webinar</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	SQO
11/26/2016	<u>Facebook Ad - Top 10 Reasons Infographic</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Annual Summer Fancy Food Show 2015</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Sales Generated</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Lost Opportunity – Example #2

 Full Circle Deal Explorer

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Opportunity Name: **Brinker - Terminals**

Account Owner Chris Toonces  
Close Date 11/26/2016  
Amount \$6,500,000.00

Originating Contact Wyman Roberts  
First Campaign Touch Sales Generated  
Primary Campaign Source Sales Generated  
Last Campaign Touch Facebook Ad - Top 10 Reasons Infographic

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Profile listing

Campaign Influence

Visualization

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Inbound Call</u>	Campaign	<u>Douglas Brooks</u>	Chairman	Evaluator	SQO
11/26/2016	<u>Gift Gard Program Webinar</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	SQO
11/26/2016	<u>Facebook Ad - Top 10 Reasons Infographic</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Annual Summer Fancy Food Show 2015</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Sales Generated</u>	Campaign	<u>Wyman Roberts</u>	CEO	Economic Decision Maker	Pre-Opportunity

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #1

 Full Circle Deal Explorer

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**Opportunity Name:** Darden Restaurants - Terminals

<b>Account Owner</b>	<u>Chris Toonces</u>	<b>Originating Contact</b>	<u>Bill Darden</u>
<b>Close Date</b>	11/26/2016	<b>First Campaign Touch</b>	<u>Food &amp; Wine Afficionado</u>
<b>Amount</b>	\$5,000,000.00	<b>Primary Campaign Source</b>	<u>Cooking for a Crowd Cheat Sheet 2015</u>
		<b>Last Campaign Touch</b>	<u>Cooking for a Crowd Cheat Sheet 2015</u>

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**Profile listing** | **Campaign Influence** | **Visualization**

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Gift Gard Program Webinar</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Website - Terminal Comparison Guide</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Cooking for a Crowd Cheat Sheet 2015</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Facebook Ad - Restaurant Management E-Book</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Food &amp; Wine Afficionado</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity

**Actionable Insight:** A Technical Buyer is present on all Closed Won Target Accounts. Ensure a Technical Buyer is identified on all Target Accounts.

# Challenge #2: Target Account Acquisition

## Closed Won Opportunity – Example #1

 Full Circle Deal Explorer

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**Opportunity Name:** Darden Restaurants - Terminals

<b>Account Owner</b>	<u>Chris Toonces</u>	<b>Originating Contact</b>	<u>Bill Darden</u>
<b>Close Date</b>	11/26/2016	<b>First Campaign Touch</b>	<u>Food &amp; Wine Afficionado</u>
<b>Amount</b>	\$5,000,000.00	<b>Primary Campaign Source</b>	<u>Cooking for a Crowd Cheat Sheet 2015</u>
		<b>Last Campaign Touch</b>	<u>Cooking for a Crowd Cheat Sheet 2015</u>

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**Profile listing** | **Campaign Influence** | **Visualization**

Date ↓	Campaign or Activity	Type	Contact	Title	Role	Sales Stage
11/26/2016	<u>Gift Gard Program Webinar</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Website - Terminal Comparison Guide</u>	Campaign	<u>Chris Chang</u>	Chief Information Officer	Technical Buyer	SQO
11/26/2016	<u>Cooking for a Crowd Cheat Sheet 2015</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity
11/26/2016	<u>Facebook Ad - Restaurant Management E-Book</u>	Campaign	<u>Bill Darden</u>		Economic Decision Maker	Pre-Opportunity

**Actionable Insight:** The Comparison Guide, when consumed by the Technical Buyer during certain stages is particularly effective. Promote / Enable Sales Team to deliver Comparison Guide to Technical Buyer during SQO/Solution Stage of Opportunity

# Challenge #2: Key Fields

- Target Account
- Contact Role Label

# Challenge #2: Key Fields

- **Target Account:** A custom checkbox field on the Account that Spiral uses to identify Target Accounts
- Contact Role Label

# Challenge #2: Key Fields

- Target Account
- **Contact Role Label:** When adding Contact Roles to an Opportunity a rep can designate what role that Contact plays related to the specific Opportunity

The screenshot shows a web interface titled "Contact Roles for AI's Coffee Shop". Below the title, there is a warning message: "The account associated with this opportunity has more than 50 contacts. To set co". At the top right of the form area are "Save" and "Cancel" buttons. The main content area has two columns: "Primary" and "Contact". Under "Primary", there are radio buttons for "No Primary Contact" and "Edgley Fran" (which is selected). Under "Contact", there is a list of contact names: "Edgley Lanell", "Edgley Fran", "Holzworth Alanna", "Basye Aleida", and "Bowen Alex". A dropdown menu is open over the "Edgley Fran" contact, showing a list of roles: "--None--", "Business User", "Decision Maker", "Economic Buyer" (checked), "Economic Decision Maker", "Evaluator", "Executive Sponsor", "Influencer", "Technical Buyer", and "Other".

# Challenge #3: Improve Lead Gen

- Using a “First Touch” model:
  - Identify emerging geographies where software Opportunities have higher conversion rates
  - Identify asset types that resonate the most with this audience
  - Expand marketing presence in emerging geos with asset types

# Challenge #3: Improve Lead Gen

	Closed Op Revenue Model1	Opportunity: Amount	Opportunity: Count	Campaign: Count	Influence Conversion
<input type="checkbox"/> <b>Account: Region: Mid-Atlantic (19 records)</b>	\$180,525.0000	\$228,525.00	19	10	73.68%
<input type="checkbox"/> <b>Account: Region: Midwest (39 records)</b>	\$205,170.0000	\$316,370.00	39	19	43.59%
<input type="checkbox"/> <b>Account: Region: Northwest (32 records)</b>	\$171,790.0000	\$237,590.00	32	15	56.25%
<input type="checkbox"/> <b>Account: Region: Southeast (43 records)</b>	\$235,775.0000	\$328,975.00	43	18	44.19%
<input type="checkbox"/> <b>Account: Region: Southwest (38 records)</b>	\$213,065.0000	\$318,665.00	38	18	47.37%
<input type="checkbox"/> <b>Account: Region: West (30 records)</b>	\$304,760.0000	\$371,760.00	30	13	60.00%
<b>Grand Totals (201 records)</b>	<b>\$1,311,085.0000</b>	<b>\$1,801,885.00</b>	<b>201</b>	<b>40</b>	<b>51.74%</b>

# Challenge #3: Improve Lead Gen

	Closed Op Revenue Model1	Opportunity: Amount	Opportunity: Count	Campaign: Count	Influence Conversion
<input type="checkbox"/> Account: Region: Mid-Atlantic (19 records)	\$180,525.0000	\$228,525.00	19	10	73.68%
<input type="checkbox"/> Account: Region: Midwest (39 records)	\$205,170.0000	\$316,370.00	39	19	43.59%
<input type="checkbox"/> Account: Region: Northwest (32 records)	\$171,790.0000	\$237,590.00	32	15	56.25%
<input type="checkbox"/> Account: Region: Southeast (43 records)	\$235,775.0000	\$328,975.00	43	18	44.19%
<input type="checkbox"/> Account: Region: Southwest (38 records)	\$213,065.0000	\$318,665.00	38	18	47.37%
<input type="checkbox"/> Account: Region: West (30 records)	\$304,760.0000	\$371,760.00	30	13	60.00%
<b>Grand Totals (201 records)</b>	<b>\$1,311,085.0000</b>	<b>\$1,801,885.00</b>	<b>201</b>	<b>40</b>	<b>51.74%</b>

**Actionable Insight:** Software Opportunities are converting at a higher rate in the Mid-Atlantic region. Focus our lead gen efforts there.

# Challenge #3: Improve Lead Gen

	Closed Op Revenue Model1	Opportunity: Amount	Opportunity: Count	Campaign: Count	Influence Conversion
<input type="checkbox"/> Account: Region: Mid-Atlantic (19 records)	\$180,525.0000	\$228,525.00	19	10	73.68%
<input type="checkbox"/> Account: Region: Midwest (39 records)	\$205,170.0000	\$316,370.00	39	19	43.59%
<input type="checkbox"/> Account: Region: Northwest (32 records)	\$171,790.0000	\$237,590.00	32	15	56.25%
<input type="checkbox"/> Account: Region: Southeast (43 records)	\$235,775.0000	\$328,975.00	43	18	44.19%
<input type="checkbox"/> Account: Region: Southwest (38 records)	\$213,065.0000	\$318,665.00	38	18	47.37%
<input type="checkbox"/> Account: Region: West (30 records)	\$304,760.0000	\$371,760.00	30	13	60.00%
<b>Grand Totals (201 records)</b>	<b>\$1,311,085.0000</b>	<b>\$1,801,885.00</b>	<b>201</b>	<b>40</b>	<b>51.74%</b>

**Actionable Insight:** Identify tactics that are effective in other regions to improve conversion rates / lead gen there

# Challenge #3: Improve Lead Gen

	Closed Op Revenue Model1	Opportunity: Amount	Opportunity: Count	Opportunity: Won	Influence Conversion
<input type="checkbox"/> <b>Account: Region: Mid-Atlantic (19 records)</b>	\$180,525.0000	\$228,525.00	19	14	73.68%
<b>Campaign: Asset Type: Infographic (2 records)</b>	\$29,450.0000	\$29,450.00	2	2	100.00%
<b>Campaign: Asset Type: Whitepaper (2 records)</b>	\$2,500.0000	\$5,500.00	2	2	100.00%
<b>Campaign: Asset Type: Comparison Guide (1 record)</b>	\$0.0000	\$5,000.00	1	0	0.00%
<b>Campaign: Asset Type: E-Book (8 records)</b>	\$85,450.0000	\$105,450.00	8	6	75.00%
<b>Campaign: Asset Type: Brochure (5 records)</b>	\$63,125.0000	\$80,125.00	5	3	60.00%
<b>Campaign: Asset Type: Demo (1 record)</b>	\$0.0000	\$3,000.00	1	1	100.00%

# Challenge #3: Improve Lead Gen

	Closed Op Revenue Model1	Opportunity: Amount	Opportunity: Count	Opportunity: Won	Influence Conversion
<input type="checkbox"/> <b>Account: Region: Mid-Atlantic (19 records)</b>	\$180,525.0000	\$228,525.00	19	14	73.68%
<b>Campaign: Asset Type: Infographic (2 records)</b>	\$29,450.0000	\$29,450.00	2	2	100.00%
<b>Campaign: Asset Type: Whitepaper (2 records)</b>	\$2,500.0000	\$5,500.00	2	2	100.00%
<b>Campaign: Asset Type: Comparison Guide (1 record)</b>	\$0.0000	\$5,000.00	1	0	0.00%
<b>Campaign: Asset Type: E-Book (8 records)</b>	\$85,450.0000	\$105,450.00	8	6	75.00%
<b>Campaign: Asset Type: Brochure (5 records)</b>	\$63,125.0000	\$80,125.00	5	3	60.00%
<b>Campaign: Asset Type: Demo (1 record)</b>	\$0.0000	\$3,000.00	1	1	100.00%

**Actionable Insight:** E-books are the acquisition point for most of the leads that are generating Opportunities in this region. Create and promote more e-books in the Mid-Atlantic region.

# Challenge #3: Key Fields

- Region
- Asset Type
- Influence Conversion (Report Formula)

# Challenge #3: Key Fields

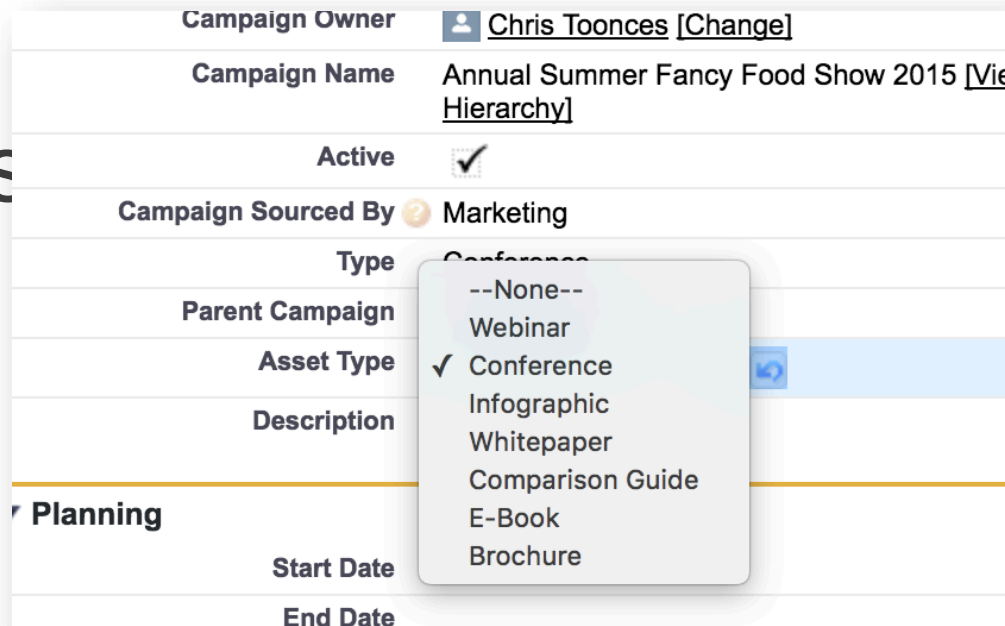
- **Region:** A formula that calculates the North American Region based on the State field
- Asset Type
- Influence Conversion (Report Formula)

## Formula Options

Data Type	Formula
	<pre>IF(LEN(BillingState)=0, "None", IF(CONTAINS("AK:WA:OR:ID:MT:WY", BillingState), "Northwest", IF(CONTAINS("CA:NV:HI", BillingState), "West", IF(CONTAINS("UT:CO:AZ:NM:TX:OK", BillingState), "Southwest", IF(CONTAINS("VA:WV:DC:MD:PA:NJ:DE:NY", BillingState), "Mid-Atlantic", IF(CONTAINS("ME:NH:MA:VT:CT:RI", BillingState), "Northeast", IF(CONTAINS("FL:GA:AL:MS:LA:AR:TN:NC:SC", BillingState), "Southeast", IF(CONTAINS("ND:SD:NE:KS:MN:IA:MO:WI:MI:IL:IN:OH:KY", BillingState), "Midwest", "Unknown"))))))))</pre>

# Challenge #3: Key Fields

- Region
- **Asset Type:** A custom field on the Campaign object Spiral uses to track the type of asset being consumed
- Influence Convers



The screenshot shows a form for a campaign record. The fields and their values are:

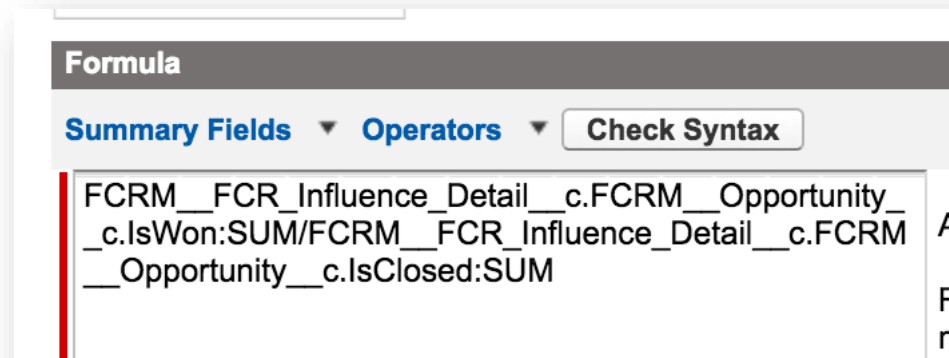
Campaign Owner	Chris Toonces [Change]
Campaign Name	Annual Summer Fancy Food Show 2015 [View Hierarchy]
Active	<input checked="" type="checkbox"/>
Campaign Sourced By	Marketing
Type	Conference
Parent Campaign	
Asset Type	Conference
Description	
Start Date	
End Date	

The dropdown menu for the Asset Type field is open, showing the following options:

- None--
- Webinar
- ✓ Conference
- Infographic
- Whitepaper
- Comparison Guide
- E-Book
- Brochure

# Challenge #3: Key Fields

- Region
- Asset Type
- **Influence Conversion (Report Formula):** A formula that calculates # Opportunities Won / # Opportunities Closed per report grouping



# Challenge #4: Optimize Events Budget

- Understand return on investment (ROI) of Tradeshow Campaigns
- Based on analysis, cut/add budget to specific Events

# Challenge #4: Optimize Events Budget

	Campaign: Actual Cost	Closed Op Revenue Model2	Closed Op Revenue Model3	Opportunity: Count	Weighted Total	Influenced ROI
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>International Hotel, Motel &amp; Restaurant Show 2015</u> (239 records)	\$25,000	\$66,307.1008	\$64,581.7018	109	\$130,888.87	4.24
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>National Restaurant Association Show 2015</u> (86 records)	\$25,000	\$30,214.6465	\$11,114.7479	55	\$41,329.45	0.65
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Payment Systems Conference 2015</u> (137 records)	\$25,000	\$16,625.0000	\$20,393.8512	81	\$37,018.92	0.48
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Restaurant Finance &amp; Development Conference 2015</u> (227 records)	\$25,000	\$7,827.6515	\$23,852.7517	75	\$31,680.52	0.27
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>The International Restaurant &amp; Foodservices Show of New York 2015</u> (47 records)	\$25,000	\$0.0000	\$28,034.5242	32	\$28,034.55	0.12
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>RFMA Annual Conference 2015</u> (60 records)	\$25,000	\$18,333.3333	\$9,177.8139	41	\$27,511.16	0.10
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Motel &amp; Restaurant Supply Show 2015</u> (122 records)	\$25,000	\$6,520.8333	\$19,505.8480	80	\$26,026.69	0.04
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Annual Summer Fancy Food Show 2015</u> (137 records)	\$25,000	\$3,472.2222	\$13,314.5277	47	\$16,786.76	-0.33
<b>Grand Total (1,055 records)</b>						

# Challenge #4: Optimize Events Budget

	Campaign: Actual Cost	Closed Op Revenue Model2	Closed Op Revenue Model3	Opportunity: Count	Weighted Total	Influenced ROI
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>International Hotel, Motel &amp; Restaurant Show 2015</u> (239 records)	\$25,000	\$66,307.1008	\$64,581.7018	109	\$130,888.87	4.24
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>National Restaurant Association Show 2015</u> (86 records)	\$25,000	\$30,214.6465	\$11,114.7479	55	\$41,329.45	0.65
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Payment Systems Conference 2015</u> (137 records)	\$25,000	\$16,625.0000	\$20,393.8512	81	\$37,018.92	0.48
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<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>RFMA Annual Conference 2015</u> (60 records)	\$25,000	\$18,333.3333	\$9,177.8139	41	\$27,511.16	0.10
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Motel &amp; Restaurant Supply Show 2015</u> (122 records)	\$25,000	\$6,520.8333	\$19,505.8480	80	\$26,026.69	0.04
<input type="checkbox"/> Campaign (Repeat Parent): Campaign Name: <u>Annual Summer Fancy Food Show 2015</u> (137 records)	\$25,000	\$3,472.2222	\$13,314.5277	47	\$16,786.76	-0.33
<b>Grand Total (4,955 records)</b>						

**Actionable Insight:** There is a significant positive ROI on the 4 top-performing shows. Re-allocate budget to 4 top-performing tradeshow. This will allow Spiral to still reach their target audience, but focus on revenue-generating shows.

# Challenge #4: Key Fields

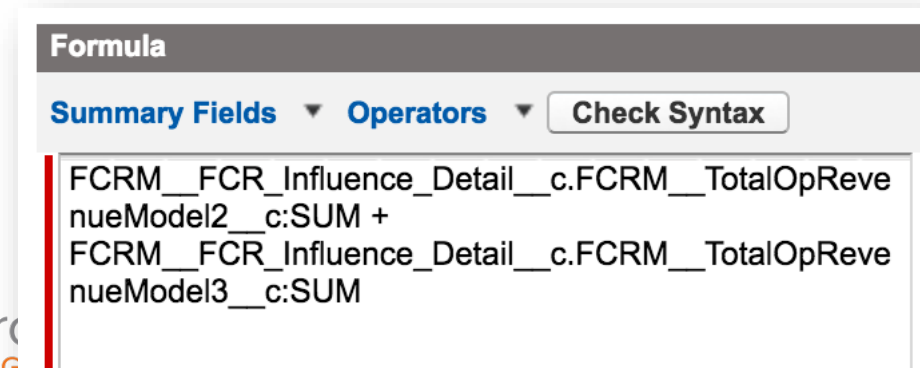
- Actual Cost
- Weighted Total (Report Formula)
- Influenced ROI (Report Formula)

# Challenge #4: Key Fields

- **Actual Cost:** A standard field on the Campaign object to track the cost associated to a Campaign. Important in order to track ROI.
- Weighted Total (Report Formula)
- Influenced ROI (Report Formula)

# Challenge #4: Key Fields

- Actual Cost
- **Weighted Total (Report Formula):** A formula that adds the influence from 2 models together per report grouping
- Influenced ROI (Report Formula)

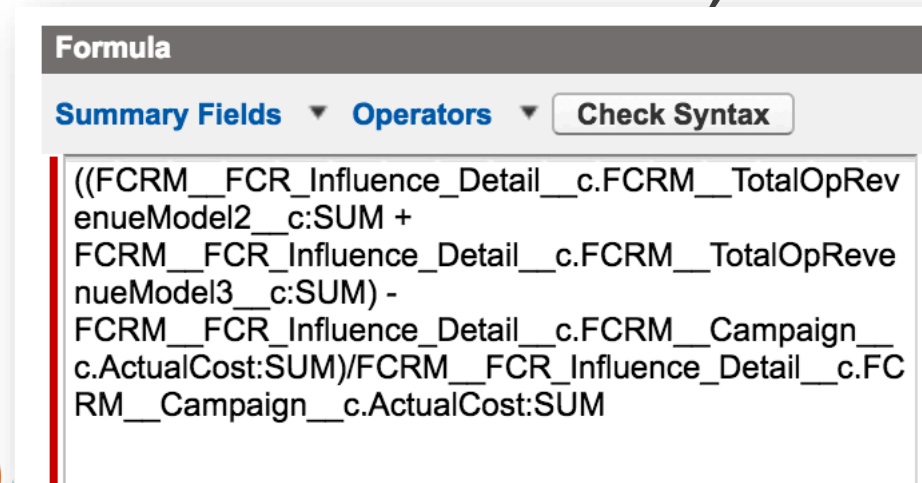


The screenshot shows a 'Formula' editor window. At the top, there are dropdown menus for 'Summary Fields' and 'Operators', and a 'Check Syntax' button. The main text area contains the following formula:

```
FCRM__FCR_Influence_Detail__c.FCRM__TotalOpRevenueModel2__c:SUM +  
FCRM__FCR_Influence_Detail__c.FCRM__TotalOpRevenueModel3__c:SUM
```

# Challenge #4: Key Fields

- Actual Cost
- Weighted Total (Report Formula)
- **Influenced ROI (Report Formula):** A formula that calculates ROI:  $(\text{Total Influence} - \text{Cost}) / \text{Cost per report grouping}$



The screenshot shows a 'Formula' editor window with a 'Check Syntax' button. The formula text is as follows:

```
((FCRM__FCR_Influence_Detail__c.FCRM__TotalOpRevenueModel2__c:SUM + FCRM__FCR_Influence_Detail__c.FCRM__TotalOpRevenueModel3__c:SUM) - FCRM__FCR_Influence_Detail__c.FCRM__Campaign__c.ActualCost:SUM)/FCRM__FCR_Influence_Detail__c.FCRM__Campaign__c.ActualCost:SUM
```

# Other Considerations

- Correlation does not equal causation
- Before making a change, look at the data from multiple perspectives. One campaign may perform well in one segment but not another.
- Be mindful of small sample sizes

# Questions?