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Sales Insight Overview

Marketo Sales Insight makes it easy to see key data about leads, contacts or accounts and provides some unique tools to increase sales effectiveness.

Top ways to use Sales Insight:
- See web activity and pages viewed for known leads
- Get an alert or 'Interesting Moment' when key events happen
- Add leads to watch list
- Use LeadScore to sort and target leads
- Send Email templates from Marketo to track open / click data

Detailed Marketing History for a lead

Marketo tracks lead activity before opt-in for anonymous web visitors. When the lead fills out a webform, all the previous page visits are recorded as well as new ones as they happen. This is great data for sales to use to drive the conversation accordingly.

To see this, go to the lead view and navigate to the 'Marketo Sales Insight panel'.

Webpage activity: View Visited Pages for a lead or contact

Score: tracks changes to lead score and the reason for the change

Email tab: view Emails Sent / Opened
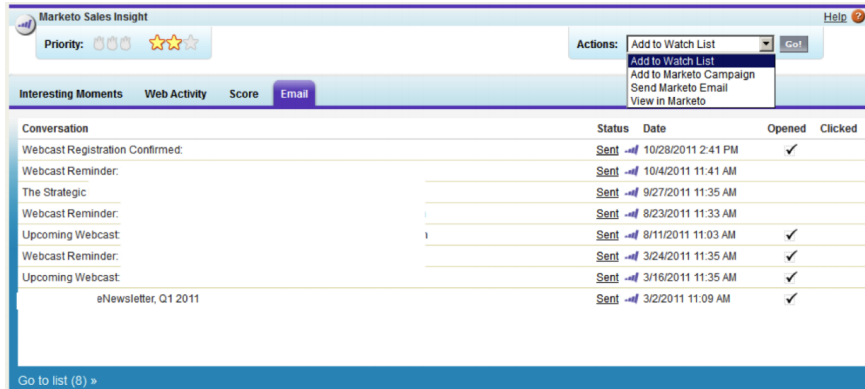
Another item you might see is 'Interesting Moments'. These act as alerts for key situations sales might want to know about.
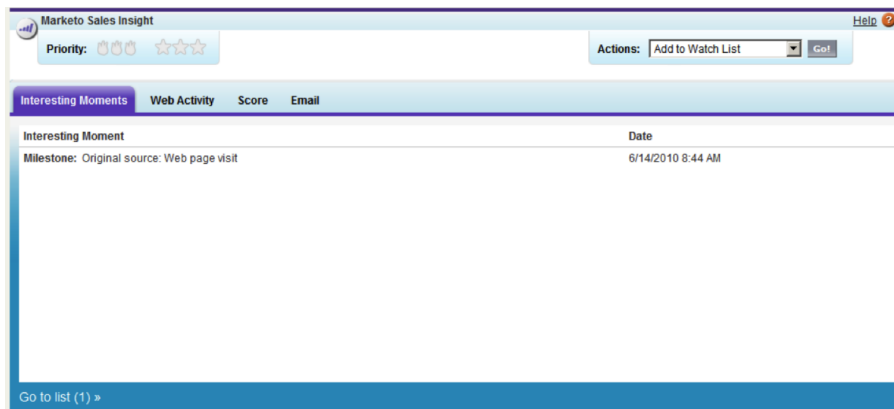
Examples:
- Opened Sales Email (email sent from the rep)
- Attended Event
- Watched Demo 2 times
- Visited 3 webpages in 1 week
- Etc.

Best Bets View

Sales Insight scores records with an Urgency and Priority represented as stars and flames. These are derived from the Lead Score within Marketo and records are put into a 'best bet' list for sales to use

Urgency - represented by flames. This shows how much this person's lead score has recently changed. The more flames, the more the score has increased lately.

Priority or Relative Score - represented by stars. This is a measure of how the person's score compares to everyone else's.

Watch List

Reps can add records to a 'watch list' to create a list of their leads to stay on top of.

Lead Feed

If a lead is on the 'Best Bets or Watch List', their interesting moments show up in the Lead Feed on the sidebar of the the main view.

Send Emails through Sales Insight

It is easy to access Marketo Templates and send them to leads within a few clicks. This is advantageous because the open/click activity is tracked, which means sales will know (in real-time) when someone is interacting with an email.

There are two ways to send emails and have them tracked through Marketo. One way is through the 'Actions' dropdown when viewing a lead or contact.   From here, 'Send Marketo Email' can be selected for a one-time message or 'Add to Marketo Campaign' can be used to trigger a pre-made campaign Marketing has setup.
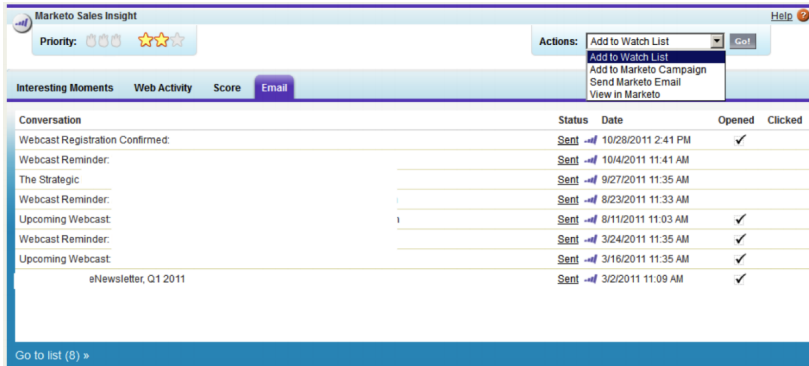
A second option is to pull up a small list of records in SalesForce, select the leads and click 'Send Marketo Email'

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