

GATORCON 2018

#GatorCon2018

Live Q&A at www.sli.do event name GatorCon2018



Reporting & Insights



What are your KPIs?

Definition

A KPI is Key Performance Indicator

Advantage

Allows you to monitor and improve your success (and your department's)



Traditional approach

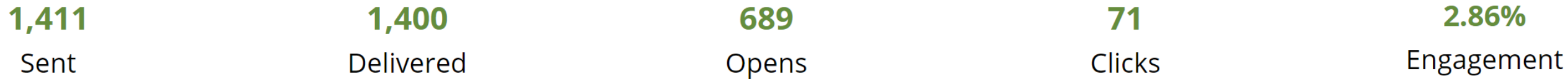
	Open	Click	Soft Bounce	Hard Bounce	Abuse	Unsub
	25.22%	3.23%	0.63%	0.48%	0.03%	0.29%
Construction	25.09%	2.99%	1.57%	1.14%	0.04%	0.37%
Arts and Artists	27.50%	2.89%	0.69%	0.51%	0.03%	0.28%
Beauty and Personal Care	19.03%	2.15%	0.46%	0.44%	0.04%	0.33%
Business and Finance	21.49%	2.77%	0.72%	0.60%	0.03%	0.24%
Computers and Electronics	21.32%	2.34%	1.08%	0.74%	0.03%	0.30%
Construction	22.68%	1.99%	1.69%	1.33%	0.05%	0.45%
Consulting	19.68%	2.40%	0.97%	0.74%	0.03%	0.29%
Creative Services/Agency	22.70%	2.77%	1.14%	0.90%	0.03%	0.36%
Daily Deals/E-Coupons	13.81%	1.83%	0.13%	0.09%	0.01%	0.10%
eCommerce	16.86%	2.50%	0.32%	0.26%	0.03%	0.22%
Education and Training	22.01%	2.78%	0.59%	0.50%	0.02%	0.20%
Entertainment and Events	21.57%	2.38%	0.53%	0.44%	0.03%	0.27%
Gambling	16.84%	3.10%	0.38%	0.46%	0.03%	0.16%
Games	21.40%	3.29%	0.49%	0.52%	0.03%	0.24%
Government	26.36%	3.64%	0.51%	0.42%	0.02%	0.13%
Health and Fitness	22.55%	2.84%	0.48%	0.48%	0.04%	0.38%
Hobbies	28.88%	5.45%	0.36%	0.28%	0.03%	0.22%
Home and Garden	24.72%	3.80%	0.65%	0.45%	0.04%	0.38%
Insurance	20.47%	2.14%	0.76%	0.82%	0.04%	0.23%
Legal	22.74%	2.98%	0.81%	0.68%	0.02%	0.22%
Manufacturing	22.88%	2.53%	1.50%	1.03%	0.03%	0.36%
Marketing and Advertising	18.41%	2.09%	0.82%	0.66%	0.03%	0.28%

Traditional approach

Industry	Open	Click	Soft Bounce	Hard Bounce	Abuse	Unsub
Accounting	22.30%	4.59%	0.31%	0.20%	0.01%	0.12%
Automotive	22.74%	2.52%	0.80%	0.79%	0.04%	0.29%
Mobile	19.84%	2.20%	0.65%	0.67%	0.03%	0.37%
Music and Musicians	23.00%	2.93%	0.63%	0.47%	0.03%	0.29%
Non-Profit	25.29%	2.85%	0.52%	0.44%	0.02%	0.19%
Other	23.34%	2.95%	0.84%	0.65%	0.03%	0.28%
Pharmaceuticals	20.28%	2.65%	0.79%	0.74%	0.03%	0.22%
Photo and Video	26.54%	3.94%	0.79%	0.67%	0.03%	0.41%
Politics	22.92%	2.33%	0.47%	0.43%	0.03%	0.21%
Professional Services	21.00%	2.68%	0.93%	0.72%	0.03%	0.30%
Public Relations	20.04%	1.68%	0.81%	0.62%	0.02%	0.22%
Real Estate	21.65%	2.01%	0.70%	0.58%	0.05%	0.32%
Recruitment and Staffing	20.13%	2.32%	0.56%	0.58%	0.03%	0.30%
Religion	26.34%	3.31%	0.21%	0.19%	0.02%	0.12%
Restaurant	21.96%	1.28%	0.27%	0.23%	0.02%	0.28%
Restaurant and Venue	22.16%	1.40%	0.61%	0.53%	0.03%	0.41%
Retail	21.52%	2.67%	0.41%	0.34%	0.03%	0.29%
Social Networks and Online Communities	21.90%	3.50%	0.41%	0.33%	0.02%	0.23%
Software and Web App	21.57%	2.42%	1.12%	0.88%	0.03%	0.39%
Sports	26.03%	3.50%	0.54%	0.47%	0.03%	0.28%
Telecommunications	21.44%	2.49%	1.21%	0.92%	0.03%	0.28%
Travel and Transportation	20.71%	2.31%	0.70%	0.51%	0.03%	0.24%
Vitamin Supplements	17.47%	2.03%	0.40%	0.29%	0.04%	0.27%

Traditional approach

Campaign Results

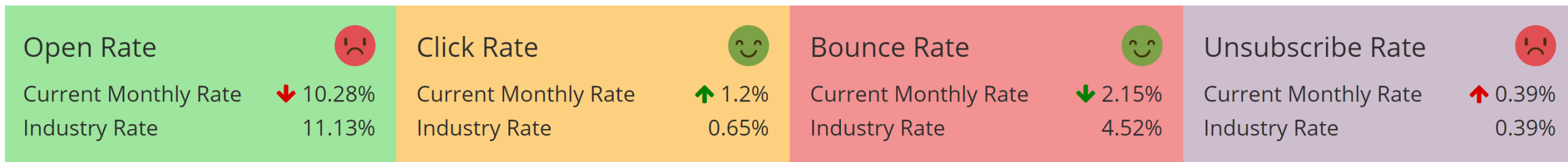


Campaign Activity Reporting

Activity reports is a comparison tool for campaigns and surveys. The results are returned to an easy to read grid, that shows the key results for your campaigns or surveys. You can also create scheduled notification of the report to send it to you at a set time. This can be done daily, weekly, monthly, or a one off specific date and time.

+ Add New Activity Report Show Filter Clear Filter			A B C D E F G H I J K L M N O P Q R S T U V W X Y Z *	
Name	Description	Date Created		
test		02/11/2018 10:34:43		✘
3 Month Report		18/07/2018 10:17:28		✘
AM Monthly Report		11/05/2018 10:57:49		✘
Monthly Activity Report		11/05/2018 10:56:37		✘
12 Month Report		09/04/2018 16:59:17		✘

Campaign Industry Comparison



Traditional approach

Some issues



EMAIL

SOCIAL

OPENS

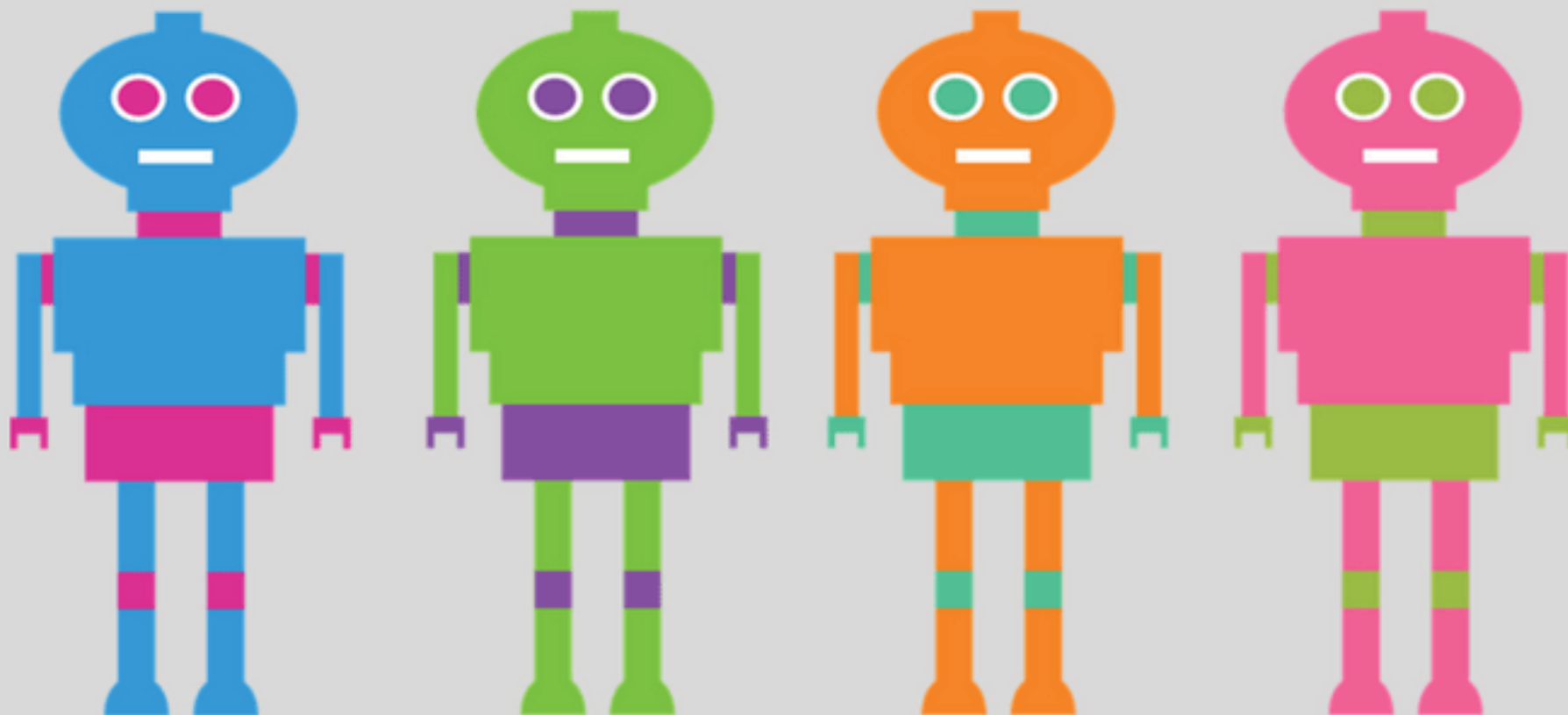
LIKES

CLICKS

SHARES

RETWEETS

We Click Links in Email For You



Traditional

MARKETING

27,647
Sent

1,346 Unique O

4.97% Open

27,057
Delivered

7.88% CtoOR

1,848
Opens

280 (106)
Clicks

0.39%
Engagement

SALES

7,626
Sent

323

4.3%

7,504
Delivered

1.24%

450
Opens

12 (4)
Clicks

0.05%
Engagement

C-LEVEL

29,095
Sent

2,172

7.65%

28,378
Delivered

2.26%

2,845
Opens

198 (49)
Clicks

0.17%
Engagement

What really matters

MARKETING

75 named contacts visited the website
12 were first time visits
5 of the 12 new visits, left the page they landed on
1 scored 20 pts and is therefore an MQL

63 were repeat visits
18 scored 20 pts or above and are MQL
1 exceeded 50

How many of the 63, who if we added today's post click points to any other activity on the month became a 50 point in the month - aka MQL?

C-LEVEL

18 named contacts visited the web
5 were first time visits
1 never left the page they landed on
2 scored more than 20pts and thus are MQL

13 repeat visits
4 scored more than 20 pts and thus are MQL
1 scored 77 pts
5 never left the page they landed on (bounced)

How many of the 9, who if we added today's post click points to any other activity on the month became a 50 point in the month - aka MQL?

SALES

1 click through, repeat visitor

What really matters

LEAD SCORING



PROFILE FIT COMPANY



ENGAGEMENT PERSONA

A 4x4 grid representing 'FOLLOW UP LEAD SCORING'. The columns are labeled A, B, C, and D. The rows are labeled 1, 2, 3, and 4. The grid contains various icons representing different actions or states.

	A	B	C	D
1	Group of people icon	Group of people icon	Phone handset icon	Envelope with magnifying glass icon
2	Group of people icon	Phone handset icon	Envelope with magnifying glass icon	Envelope with magnifying glass icon
3	Phone handset icon	Envelope icon	Envelope with magnifying glass icon	Downward arrow icon
4	Envelope icon	Envelope icon	Downward arrow icon	Downward arrow icon

FOLLOW UP LEAD SCORING

What really matters



Hello
Sarah

LEAD SCORE
310

LEAD GRADE
D-



Hello
Chris

LEAD SCORE
190

LEAD GRADE
C-



Hello ★
Sam

LEAD SCORE
390

LEAD GRADE
A-

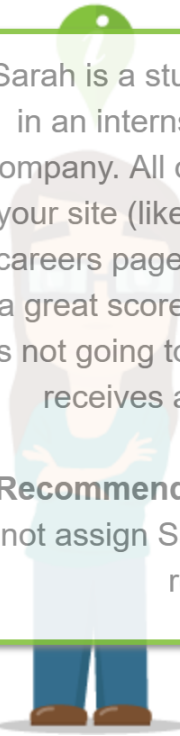


Hello ★
Emily

LEAD SCORE
012

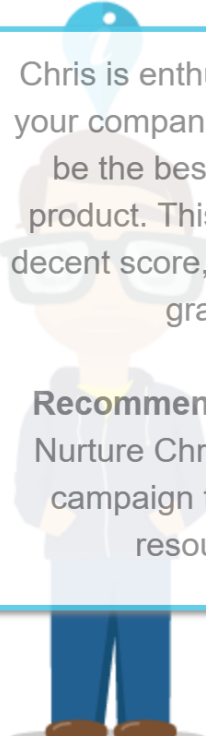
LEAD GRADE
B+

What really matters

A female character with long brown hair, wearing a blue top and blue pants, standing behind a green-bordered sign. A green question mark icon is above her head.

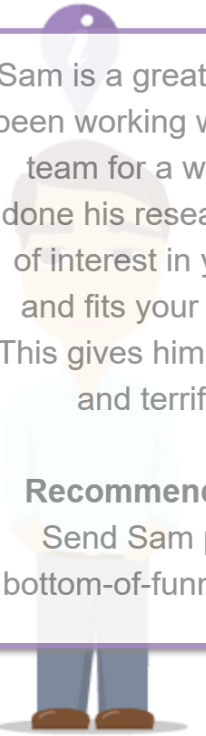
Sarah is a student interested in an internship with your company. All of her activity on your site (like browsing your careers page) has given her a great score, but since she is not going to purchase, she receives a low grade.

Recommended Action: Do not assign Sarah to a sales rep.

A male character with glasses, wearing a grey shirt and blue pants, standing behind a blue-bordered sign. A blue question mark icon is above his head.

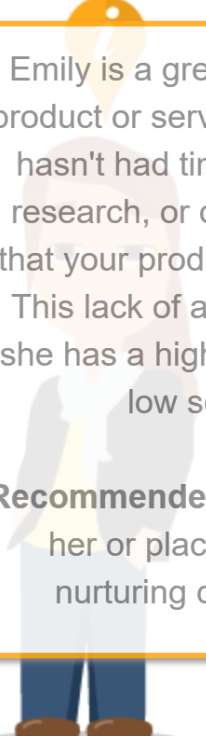
Chris is enthusiastic about your company, but may not be the best fit for your product. This gives him a decent score, but moderate grade.

Recommended Action: Nurture Chris with a drip campaign to conserve resources.

A male character with short brown hair, wearing a grey shirt and blue pants, standing behind a purple-bordered sign. A purple question mark icon is above his head.

Sam is a great lead who has been working with your sales team for a while. He has done his research, has a lot of interest in your product, and fits your ideal profile. This gives him a great grade and terrific score.

Recommended Action: Send Sam pricing and bottom-of-funnel resources.

A female character with long brown hair, wearing a grey shirt and blue pants, standing behind an orange-bordered sign. An orange question mark icon is above her head.

Emily is a great fit for your product or service, but either hasn't had time to do any research, or doesn't know that your product exists yet. This lack of activity is why she has a high grade, but a low score.



Recommended Action: Call her or place her on a nurturing campaign.

What really matters

Identifying where the traffic coming onto your website is coming from

- We need to identify what campaigns and channels are working.
- Use UTM Values
- Use Campaign reporting in GatorLeads



Traffic Medium	Count	%age
 email	2502	54.53
		



What really matters

TAKING LEADS
FROM MQL TO SQL:

SHARING IS CARING
HERE'S OUR
REPORTING



What really matters

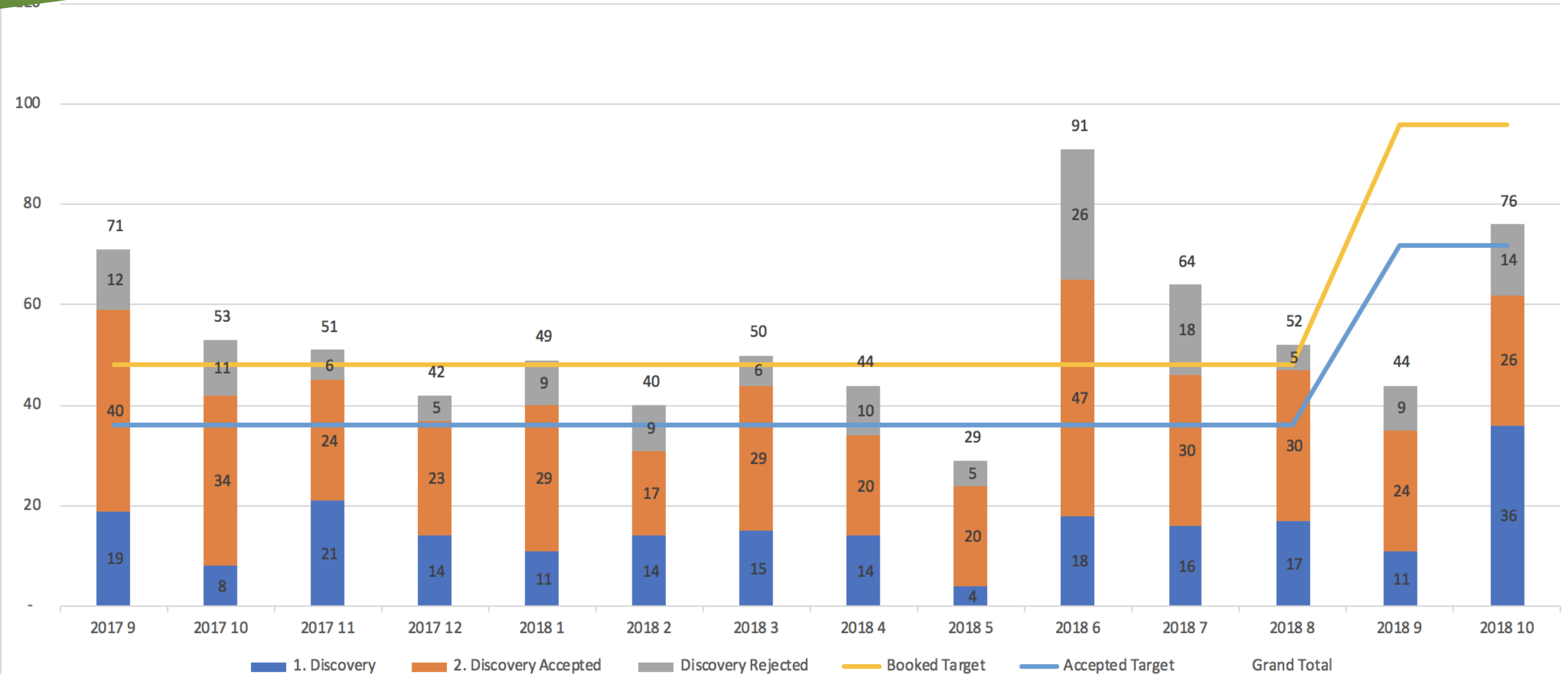
Key Business performance – Sales pipeline and appointment growth

KPI	Target	Actual
MQL's generated in the month**	650	200
Discovery calls booked in a month	96	74 (36)
Opportunities created in the month	£31,500	£19,180
New contracted revenue in the month	£7,500	£7,525

What really matters

Biz Dev Discovery Call performance against target

Appointments



What really matters

Calling Lists in CRM

Sales Lists	
<input type="checkbox"/> Name ↑	Purpose
List 1 - TTP Hot	Sales
List 2 - TTP Renewing 5 months (not spoken 30 ...	Sales
List 3 - MQL Gold this month	Sales
List 4 - MQL Gold this year	Sales
List 5 - Paid ads	Sales
List 6 - MQLs Not Spoken to ever or past 30 days	Sales
List 7 - Key Sales Pages Visited	Sales
List 8 - Hot Leads not MQL	Sales
List 9 - Big enough, B2B, UK - no MKT contact	Sales
List. 10 - MQLs to profile	Sales
List. 11 - Hot Leads to profile - Size Unknown	Sales
List. 12 - Big enough (B2B & Country Unknown) ...	Sales
List. 13 - Chamber of Leads	Sales

Account Name ↑	Primary Contact
Swan	Kevin
Warehouse Voice and Data PLC	Nicky
PE Pipe Systems	Tim H
idge Ltd.	Adam
Group Limited	Sarah
o Limited	Alice
ter Shows Limited	Alexa
lex	g pari

What really matters

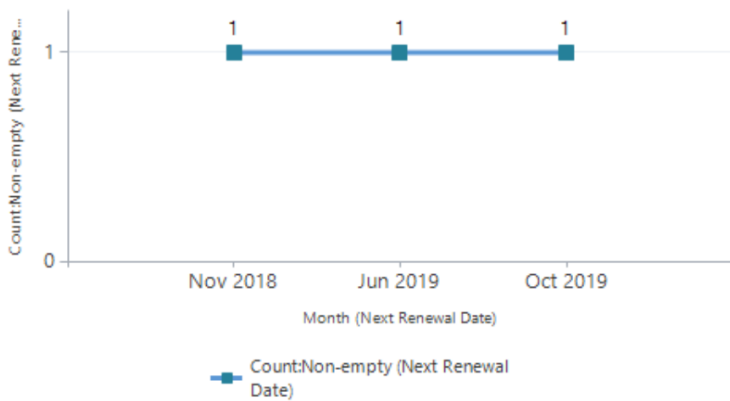
Dashboards in CRM

Account Managers ▾

Upcoming Contract Expiry Date by month



MY Customers Going to Expire



1. My Active Accounts ▾



Account Name ↑	Parent Account...	Account Type	Last Call Date	Contract Perio...	Last contract d...	Next Renewal...	Total Monthly...	Cancellation Risk
Adare SEC Ltd.		Customer -...		QUARTERLY	01/01/2100	30/06/2019	£1,250.00	High
Club Wembley		Customer -...			01/01/2100	01/01/2100	£1,000.00	Low
Development Bank of Wales		Served notic...	29/09/2017	Quarterley	01/01/2100	25/11/2018	£3,564.67	Normal
Madison Web Solutions Ltd		Customer					£0.00	Normal
Stevensons		Customer	17/07/2018		01/01/2100	15/10/2019	£872.95	Normal

Contract Renewal RISK by Contract Renewal RISK



1. My Active Accounts



My open Activities ▾



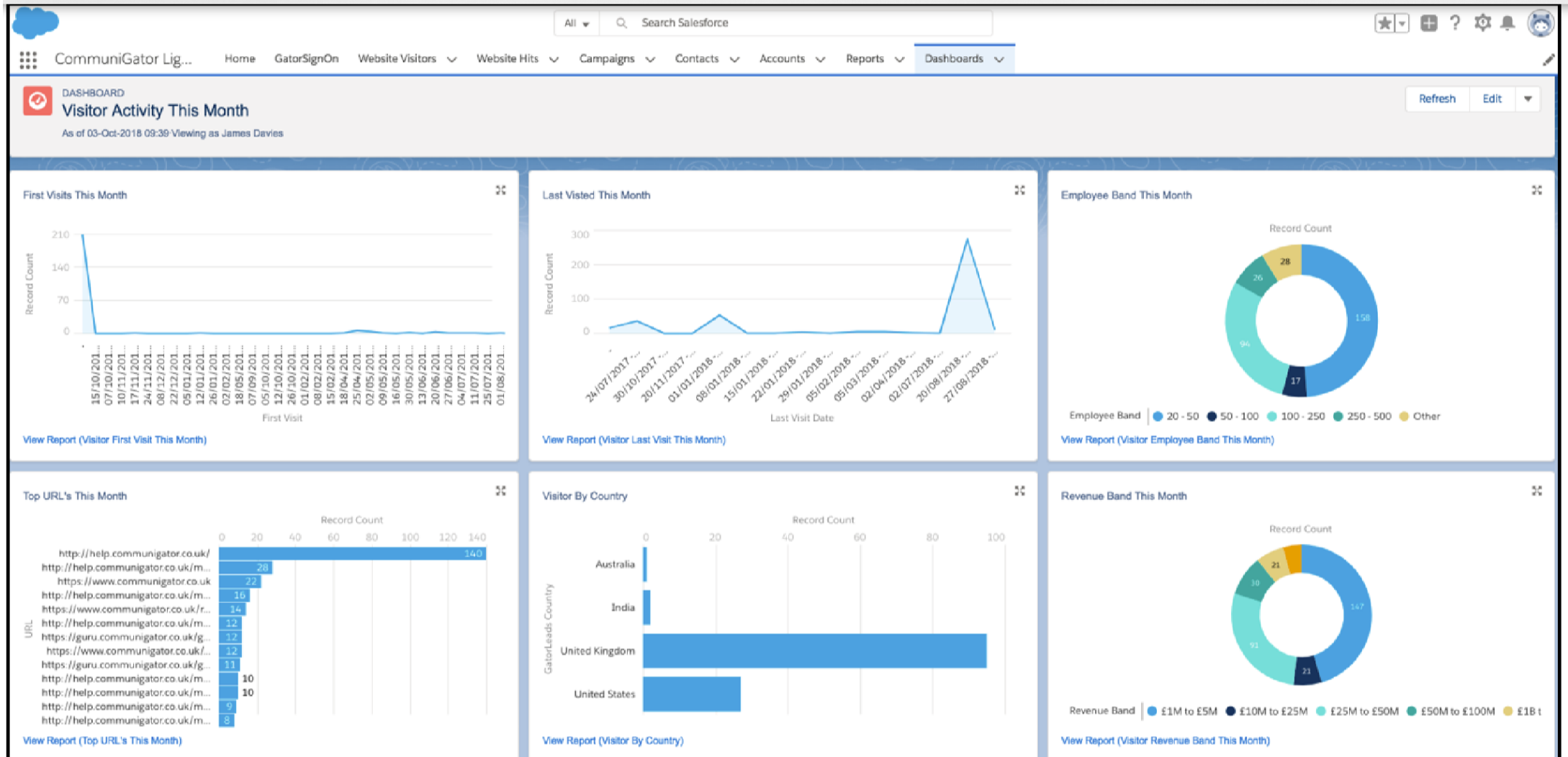
Search for records



Activity Type	Subject	Regarding	Priority	Start Date	Description	Due Date ↑	Primary C
Phone Call			Normal				
Phone Call			Normal				
Appointment	test 2		Normal	17/06/2017 09:00		17/06/2017 09:30	

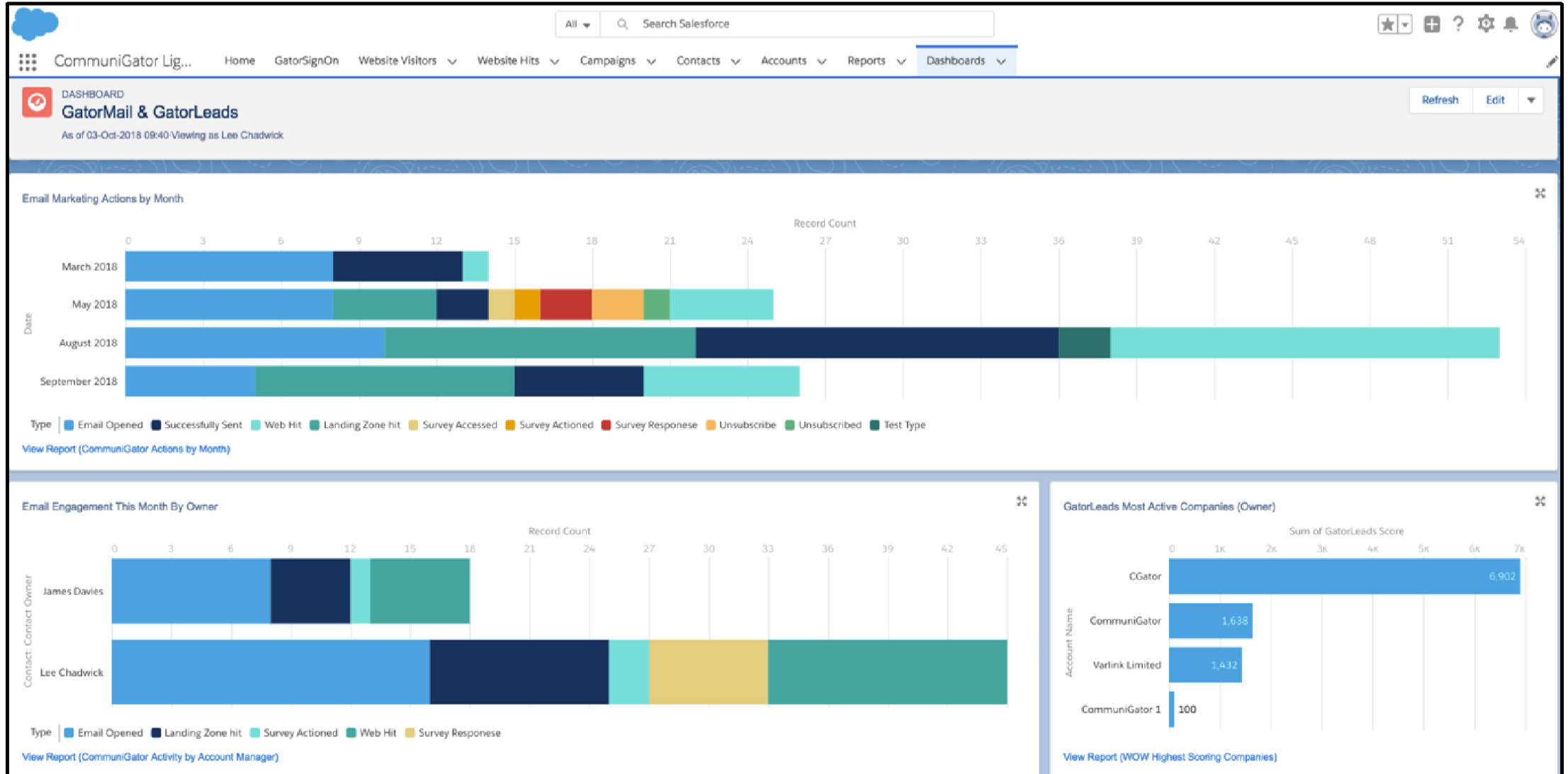
What really matters

Dashboards in CRM



What really matters

Dashboards in CRM



KPIs

How much traffic do you need to keep your sales team busy?

- Do you have a definition of an MQL agreed with your sales team?
- How many MQL's do they need every month?
- What channels provide the best MQL?



tions



Other forms of reporting you might want to consider

- List growth
- Top performing campaigns of the month
- Identify the types of personas that are interacting with campaigns
- Ensure that when you're reviewing campaigns by filtering on type i.e. not looking at customers and prospect combined, but looking at the reports separately.

ANY QUESTIONS?

Thank You!

An abstract geometric pattern composed of numerous gray triangles of varying sizes and shades, arranged in a complex, crystalline structure that resembles a snowflake or a cluster of crystals. The pattern is set against a dark background and occupies the lower right portion of the slide.

Setting a conversion rate



WHAT IT IS: THE PERCENTAGE OF EMAIL RECIPIENTS WHO HAVE ENGAGED WITH CERTAIN PAGES ON THE WEBSITE OFF THE BACK OF EMAIL BEHAVIOUR AND COMPLETING THE DESIRED ACTION, SUCH AS INCREASING THEIR GATORLEADS SCORE BY 20 IN A WEEK OR 50 IN A MONTH



HOW TO CALCULATE IT: (NUMBER OF PEOPLE WHO COMPLETED THE DESIRED ACTION ÷ NUMBER OF TOTAL EMAILS DELIVERED) * 100



EXAMPLE: EXAMPLE: 400 PEOPLE WHO COMPLETED THE DESIRED ACTION ÷ 10,000 TOTAL EMAIL DELIVERED * 100 = 4% CONVERSION RATE