



**MOPS-APALOOZA**

# A Smarter Way to B2B Funnel Tracking



**Todd Sprinkel**



# Principal Solution Architect at Sponge.io

- [todd@sponge.io](mailto:todd@sponge.io)
- Salesforce Certified Advanced Admin
- Technician Award winner, 2022 MOPsIES
- 14 years of experience in marketing/sales ops
- Previous Companies: Logi Analytics, Snagajob



**Todd Sprinkel**



# Today we're talking about a smarter way to B2B funnel tracking

- What IS the funnel? Is it still relevant? Which model is the best?
- You **NEED** to be tracking something here to get an idea of performance or you're basically just practicing divination.

**“All models are wrong but some are useful.”**

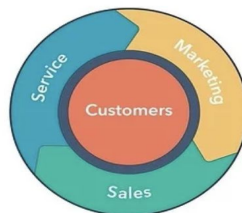




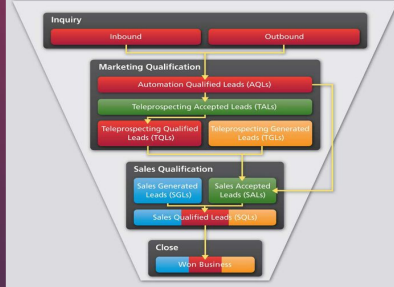
**Then = Funnel**  
Customers as an afterthought



**Now = Flywheel**  
Customers at the center



The SiriusDecisions Demand Waterfall



■ Demand originated from marketing-led activities   ■ Handoff from one function to another  
 ■ Demand originated from teleprospecting function   ■ Demand created by direct sales or channel resource  
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Customer Experience



The SiriusDecisions Demand Unit Waterfall



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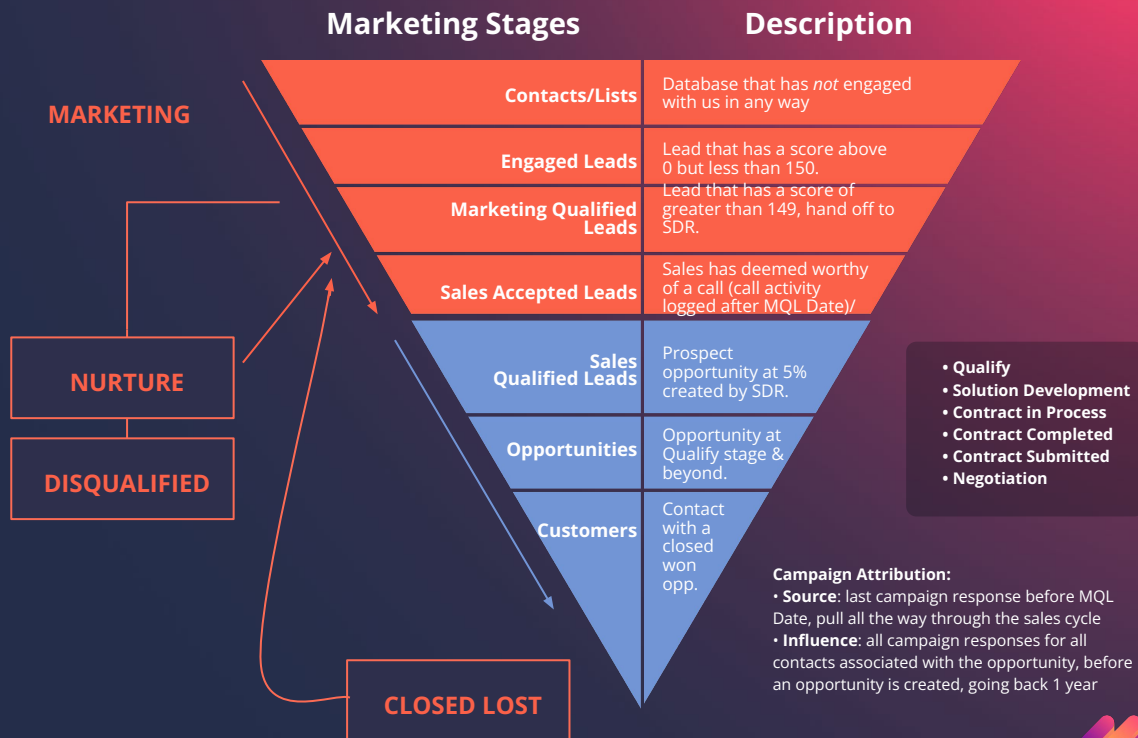
Bow tie model



# Defining your Stages

- Volume
- Conversion and Velocity
- Where is it coming from?
- Without structure, can lead to poor buyer experience, internal confusion
- If you're not tracking, you can't improve

## The Marketing & Sales Funnel



# Defining your Stages



- This is NOT just a marketing discussion - get sales and customer success involved too
- Reporting questions will drive some of the stages you use (e.g. How many meetings were booked?)
- Time to lay any missing groundwork and tighten up your processes
- Take your time—cover all the edge cases





**MARKETERS**



**ANYONE  
WITH A PULSE**

**IS THIS AN MQL?**

imgflip.com



Funnel Stage	Associated Contact Status	Status Details	Definition	Notes
<b>Success Path</b>				
Prospect	Prospect		Account Type ≠ Customer	
Engaged	Prospect		Account Type ≠ Customer	
Marketing Qualified	Marketing Qualified	P1 - MQL P2 - MQL	Account Type ≠ Customer	
SAL	Working		Account Type ≠ Customer Contact Status = Working && Previous Funnel Stage = Marketing Qualified	SalesLoft automatically sets status to Working when a lead is added to a cadence by a LDR. Funnel logic will handle the differentiation between SAL & SGL.
SGL	Working		Account Type Account Type ≠ Customer Contact Status = Working && Previous Funnel Stage ≠ Marketing Qualified	SalesLoft automatically sets status to Working when a lead is added to a cadence by a LDR. Funnel logic will handle the differentiation between SAL & SGL.
Qualified Prospect Identified	Stage 0	LDR Scheduled Meeting Sales Created	Account Type ≠ Customer Contact associated with an opportunity set to Stage = Stage 0.  Notes: Default status details to Sales created. If an LDR creates it, we should put LDR Scheduled Meeting in Status Details	
Sales Qualified Lead	Opport		Account Type ≠ Customer Contact is associated with an opportunity via contact roles that is Stage 1 or greater.  Assumption: meeting was held	

<b>Post-Purchase Success Path</b>						
Closed Won	Customer	C-MQL	Marketing Qualified	P1 - MQL P2 - MQL	Account Type = Customer	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.
		C-Working	Working		Account Type = Customer Contact Status = Working	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer. SalesLoft automatically sets status to Working when a lead is added to a cadence by a LDR.
		C-Qualified Prospect Identified	Stage 0	LDR Scheduled Meeting Sales Created	Account Type = Customer Contact associated with an opportunity set to Stage = Stage 0.  Notes: Default status details to Sales created. If an LDR creates it, we should put LDR Scheduled Meeting in Status Details	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer. SalesLoft automatically sets status to Meeting Scheduled when a meeting is scheduled between an LDR and AE.
		C-Sales Qualified Lead	Opportunity		Account Type = Customer Contact is associated with an opportunity via contact roles that is Stage 1 or greater.	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.

Disqualified	Disqualified	Auto DQ - Bad Email Auto DQ - Employee Auto DQ - Competitor No Longer with Account	Auto DQ: email contains @Sponge.io Auto DQ: List of named competitors		
Nurture	Renurture	Unresponsive Inactive Customer Follow up in 3 Months Follow up in 6 Months Using a Competitor Vendor Closed Lost	Account Type ≠ Customer Contact Status = Renurture Funnel Stage = SAL or SGL && Last Stage Change > 30 Days Ago && Cadence Next Step Due Date > 3 Days Ago Formerly Stage 0 Opp is marked as closed - loss Customer becomes Customer - Inactive		You cannot re-MQL for 30 days after being placed in nurture unless you complete a fundraiser activity
Closed Lost	Renurture	Unresponsive Inactive Customer Follow up in 3 Months Follow up in 6 Months Using a Competitor Vendor Closed Lost	Account Type ≠ Customer Contact is associated with an opportunity via contact roles that is Stage Closed - Loss and previous stage was 1 or greater		



**Ok...great. Now how do  
I measure that?!**



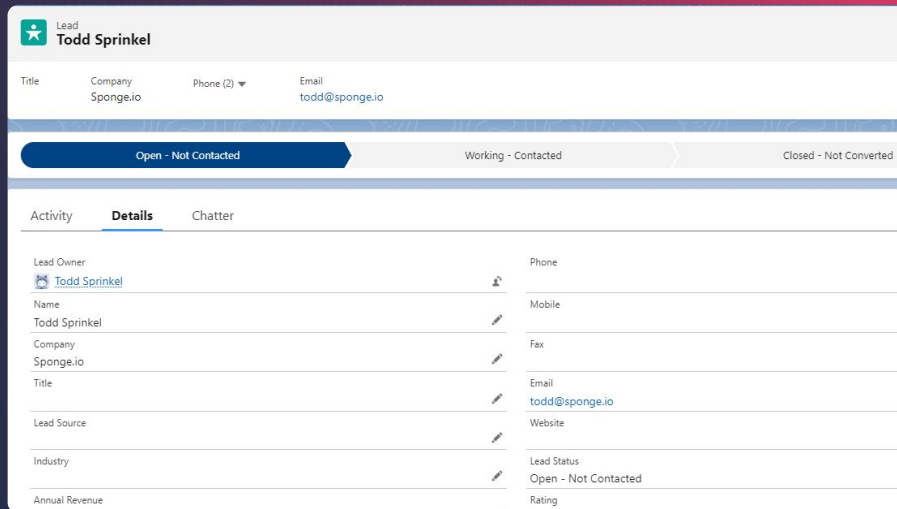
# Option 1: Lead Status

## Pros

- Out of the box
- Customizable
- Easy to understand

## Cons

- Only current state
- Doesn't exist OOTB on Contacts
- Separate reports for Leads and Contacts



The screenshot displays a Salesforce Lead record for Todd Sprinkel. At the top, the lead's name and a star icon are shown. Below this, a header bar contains the lead's status: "Open - Not Contacted", which is highlighted in blue. To the right of this bar are two other status options: "Working - Contacted" and "Closed - Not Converted".

The main content area is divided into three tabs: "Activity", "Details", and "Chatter". The "Details" tab is currently selected. It shows a list of fields for the lead, including:

- Lead Owner: Todd Sprinkel (with a user icon and edit icon)
- Name: Todd Sprinkel (with an edit icon)
- Company: Sponge.io (with an edit icon)
- Title: (with an edit icon)
- Lead Source: (with an edit icon)
- Industry: (with an edit icon)
- Annual Revenue: (with an edit icon)
- Phone: (with an edit icon)
- Mobile: (with an edit icon)
- Fax: (with an edit icon)
- Email: todd@sponge.io (with an edit icon)
- Website: (with an edit icon)
- Lead Status: Open - Not Contacted (with an edit icon)
- Rating: (with an edit icon)



## Option 2: Date Stamps

### Pros

- Easy to understand
- Can calculate both volume and conversion\*

### Cons

- Separate reports for Leads and Contacts
- Doesn't support multiple cycles

Prospect Date ⓘ	✎
SQL Date ⓘ	✎
SAL Date	✎
Customer Date	✎



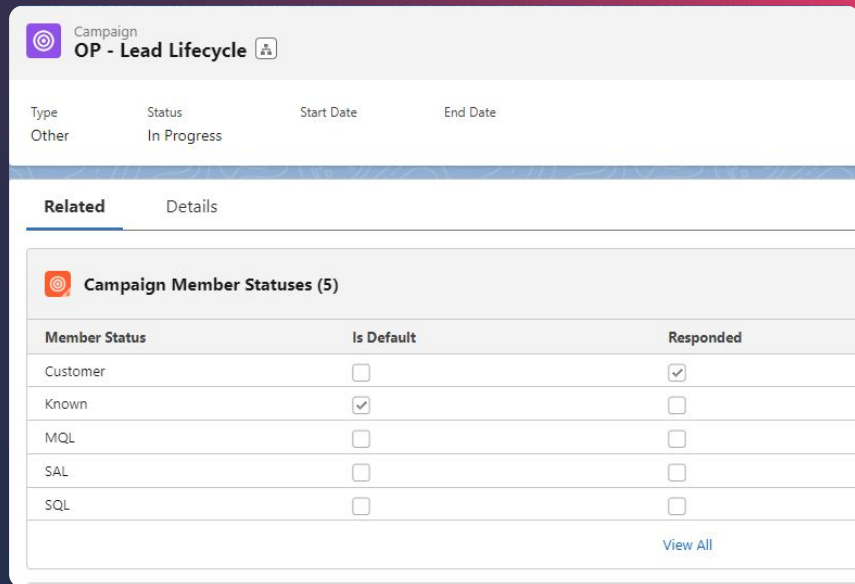
# Option 3: Operational SFDC Campaign

## Pros

- Single report for Leads and Contacts
- Can calculate both volume and conversion\*

## Cons

- Doesn't support multiple cycles
- Not what Campaigns are designed for



The screenshot shows a Salesforce report titled "Campaign OP - Lead Lifecycle". The report is filtered by "Type: Other" and "Status: In Progress". It displays a table of "Campaign Member Statuses (5)".

Member Status	Is Default	Responded
Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Known	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MQL	<input type="checkbox"/>	<input type="checkbox"/>
SAL	<input type="checkbox"/>	<input type="checkbox"/>
SQL	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right of the table, there is a link labeled "View All".



# Option 4: Track on Campaign Member


## Pros

- Single report for Leads and Contacts
- Can calculate both volume and conversion\*
- Attribution\*
- Supports multiple cycles

## Cons

- Cycles that don't start with Marketing response

Campaign History Printable View | Help for this Page

 Alex  
Contact: Alex

Action	Campaign Name	Response Date +	Response Status	Status	Inquiry	QL	SAL	SAO	SQO	Net New Name
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">Event - SiriusDecisions TechX - 2017 10</a>	11/2/2017 9:32 AM	Resolved - Already Engaged	Attended our session	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">Website - Demo Request</a>	10/23/2017 8:04 AM	Resolved - Already Engaged	Responded	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">Oz's Prospecting</a>	10/19/2017 11:44 AM	Resolved - Opportunity Won	Responded	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">SDR LNP August 2017- Marketing</a>		Not a Response	Sent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">Ivy's Datanalyze Prospecting</a>		Not a Response	Sent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">SDR Nurture Prospecting - 2017 Q1</a>		Not a Response	Sent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



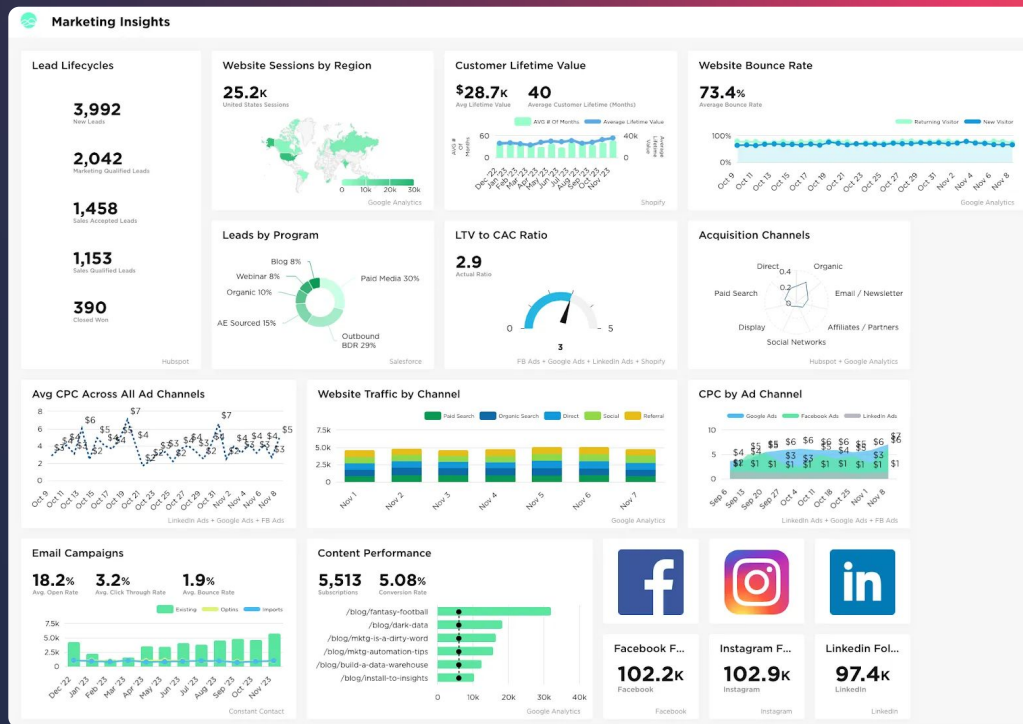
# Option 5: Use a BI Tool

## Pros

- Extremely flexible
- Can join across multiple objects in a single report

## Cons

- Requires dedicated resources
- Can lead to distrust of metrics
- Can be hard to correct mistakes





**Drumroll for my  
favorite option...**





## Option 6: Salesforce Custom Object

### The Problem

Salesforce is natively good at showing you the present state of leads and opportunities. But out of the box, it is not good at displaying time-series data—the history of leads' engagement over time as they progress through the buying cycle.

### The Solution

By creating a custom Funnel History Object in Salesforce, you can “stamp” each contact as it progresses through the funnel, including dates and stage names.

### The Result

- You can report on how specific campaigns drive MQLs and Opps.
- You can accurately report on contacts that stop and restart multiple buying cycles.
- You can see how quickly contacts move from stage to stage.



**Let's get into the mechanics  
of how this actually works**



Funnel Stage	Associated Contact Status	Status Details	Definition	Notes
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<b>Post-Purchase Success Path</b>						
Sales Qualified Lead	Opport	C-MQL	Marketing Qualified	P1 - MQL P2 - MQL	Account Type = Customer	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.
		C-Working	Working		Account Type = Customer Contact Status = Working	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.  SalesLoft automatically sets status to Working when a lead is added to a cadence by a LDR.
Closed Won	Custom				Account Type = Customer Contact associated with an opportunity set to Stage = Stage 0.  Notes: Default status details to Sales created. If an LDR creates it, we should put LDR Scheduled Meeting in Status Details	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.  SalesLoft automatically sets status to Meeting Scheduled when a meeting is scheduled between an LDR and AE.
Detours		C-Qualified Prospect Identified	Stage 0	LDR Scheduled Meeting Sales Created	Account Type = Customer Contact is associated with an opportunity via contact roles that is Stage 1 or greater.	SFDC ALERT ON TOP OF CONTACT PAGE: BE AWARE! This is a Customer.
		C-Sales Qualified Lead	Opportunity			

Disqualified	Disqualified	Student / Academic Auto DQ - Country Auto DQ - Bad Email Auto DQ - Employee Auto DQ - Competitor No Longer with Account	Auto DQ: Email Contains mail, freemail, fuck, shit, bitch, @abcd, etc. -- Auto DQ: email contains @Sponge.io -- Auto DQ: List of named competitors		
Nurture	Renurture	Unresponsive Inactive Customer Follow up in 3 Months Follow up in 6 Months Using a Competitor Vendor Closed Lost	Account Type ≠ Customer -- Contact Status = Renurture -- Funnel Stage = SAL or SGL && Last Stage Change > 30 Days Ago && Cadence Next Step Due Date > 3 Days Ago -- Formerly Stage 0 Opp is marked as closed - loss -- Customer becomes Customer - Inactive		You cannot re-MQL for 30 days after being placed in nurture unless you complete a fundraiser activity
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# One record per stage vs. One record per cycle

Funnel History a01Ke00000c52J	
Related	Details
Funnel History Name a01Ke00000c52J	Owner <a href="#">Todd Sprinkel</a>
Age in Days 0.00	Date Closed 9/24/2024 11:28 AM
Lead <a href="#">John Lennon</a>	Closed By <a href="#">Todd Sprinkel</a>
Company Beatles	SAL Date
Contact	SQL Date
Account	Opportunity Date
Current Funnel Stage Disqualified	Customer Date
Previous Funnel Stage	Opportunity
Funnel Stage MQL	Opportunity Owner
Next Funnel Stage Disqualified	Primary Campaign Source <a href="#">Test New Campaign</a>
Is Current Sales Cycle?	

## CUSTOM OBJECT - SCALABLE

### JOURNEY #1: SEM → EBOOK

- MQL YYYY-MM-DD
- SQL YYYY-MM-DD


### JOURNEY #2: EMAIL → WEBINAR

- MQL YYYY-MM-DD
- SQL YYYY-MM-DD

### JOURNEY #3: CONTENT SYNDICATION

- MQL YYYY-MM-DD
- SQL YYYY-MM-DD

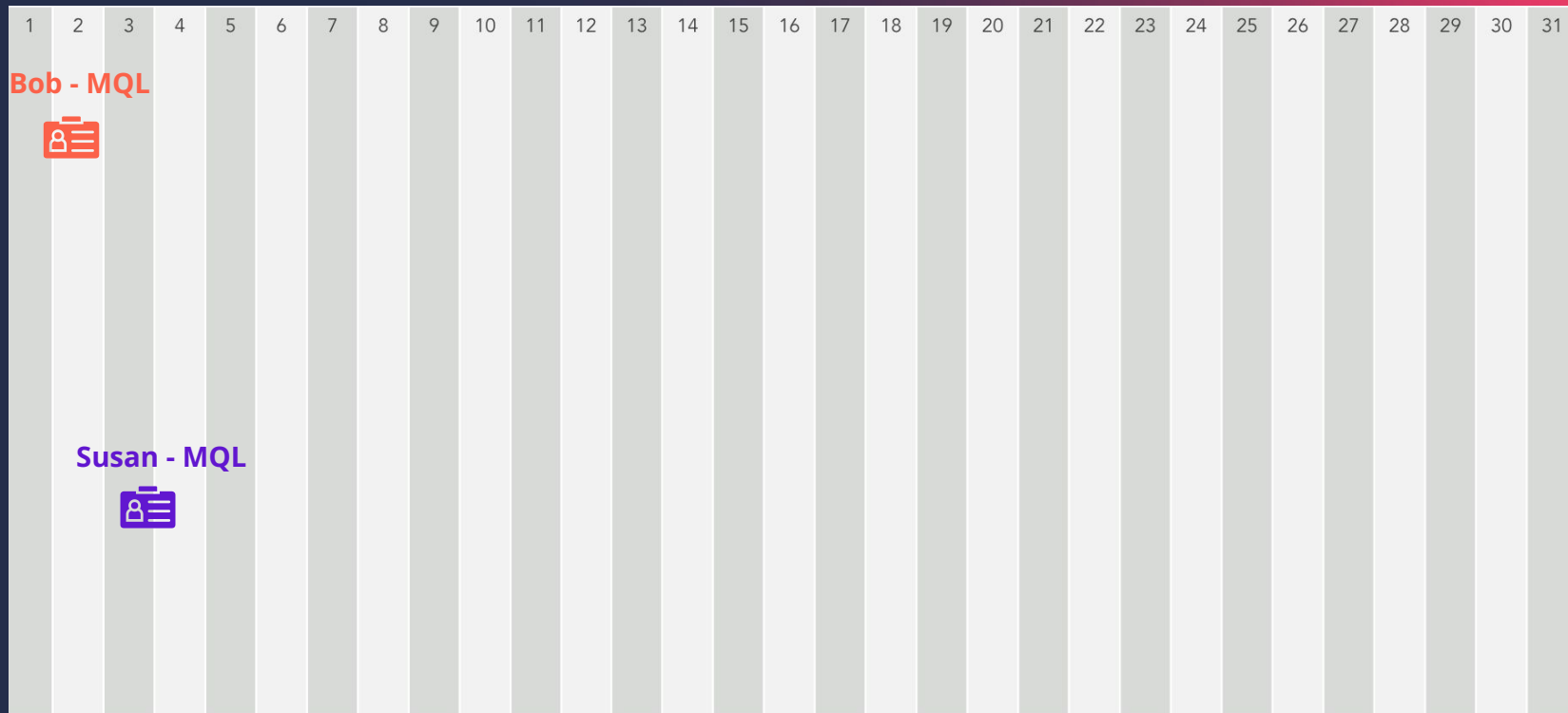
### JOURNEY #4: ORGANIC → DEMO

- MQL YYYY-MM-DD
- SQL YYYY-MM-DD
- WON YYYY-MM-DD 



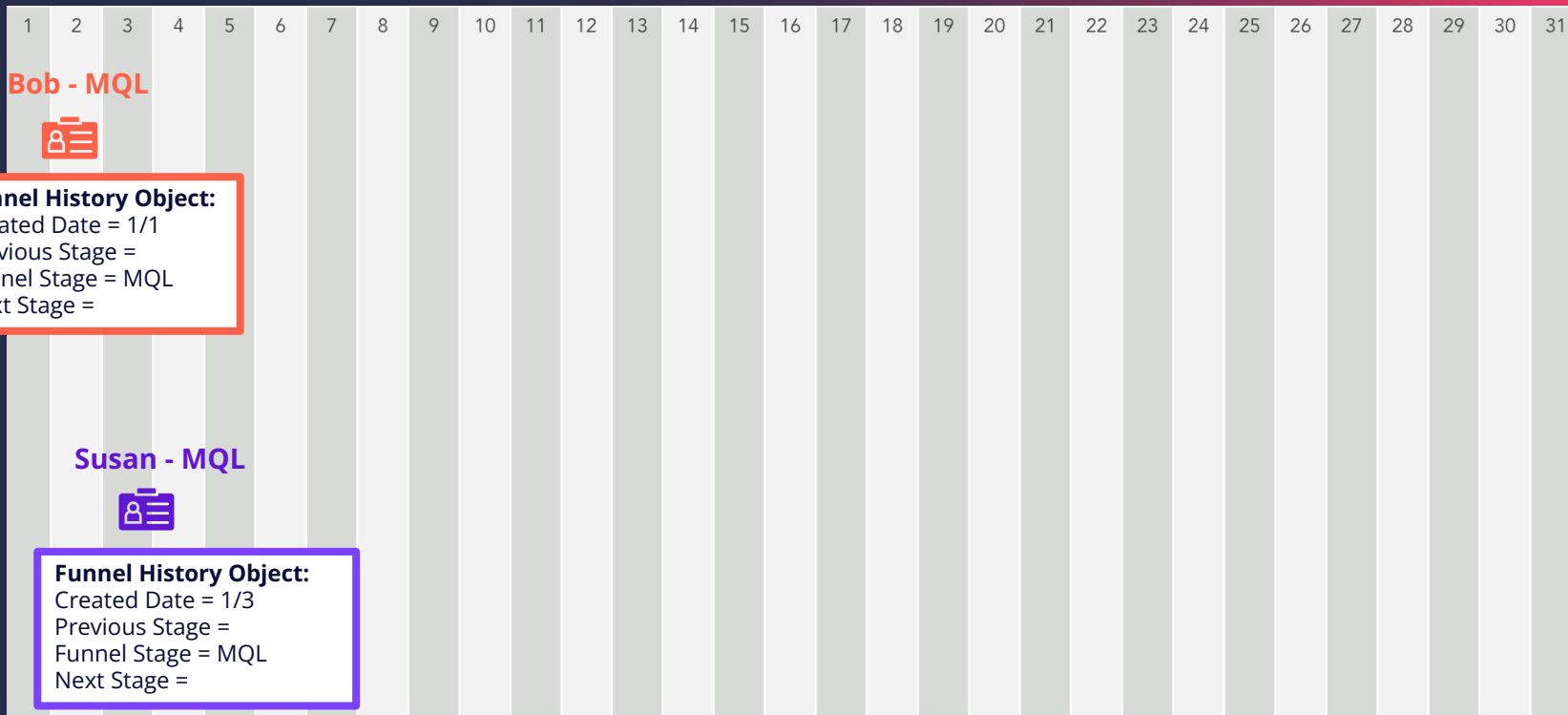
# 2 contacts enter the funnel in January...

January



# and the Funnel History Object begins stamping their stages.

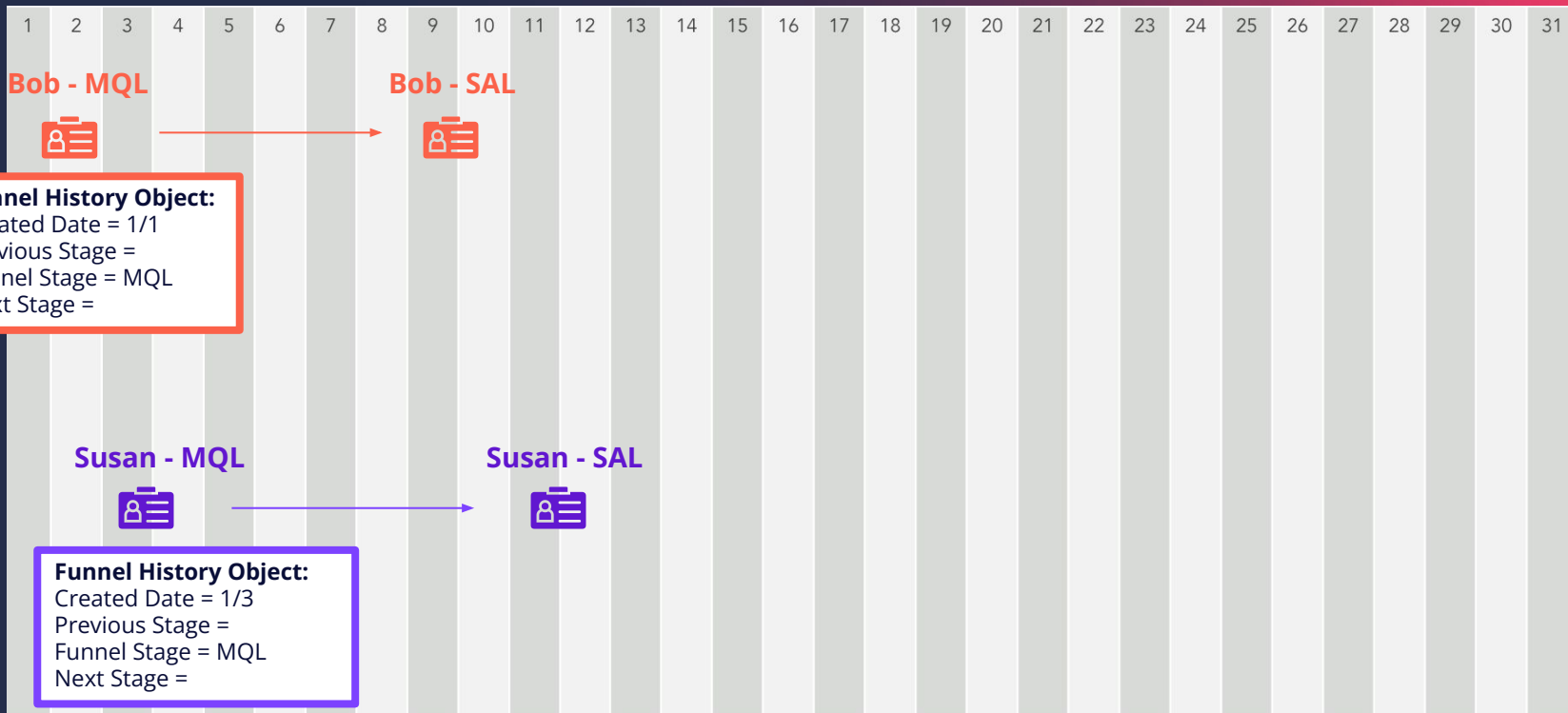
January





# As the contact moves through the funnel...

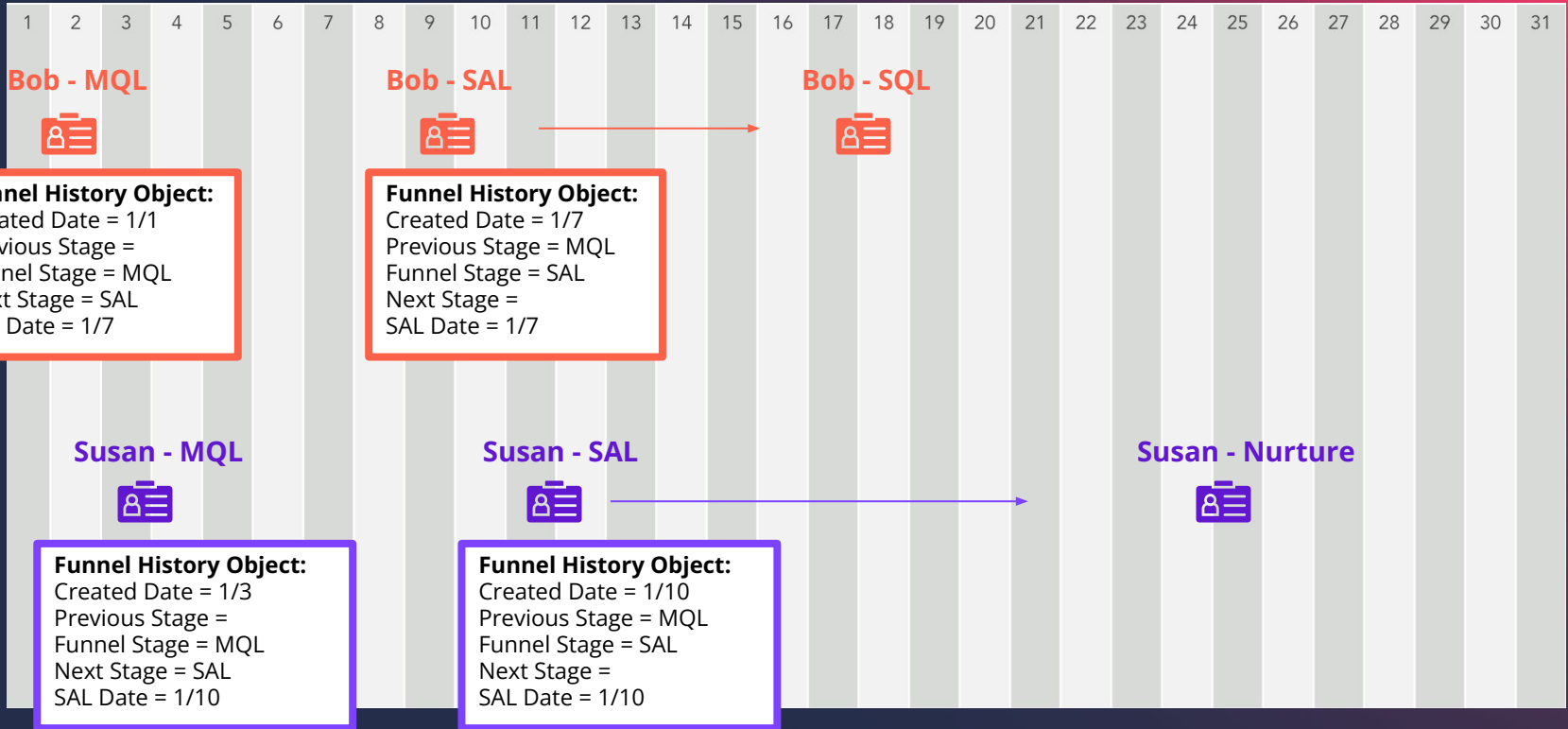
January





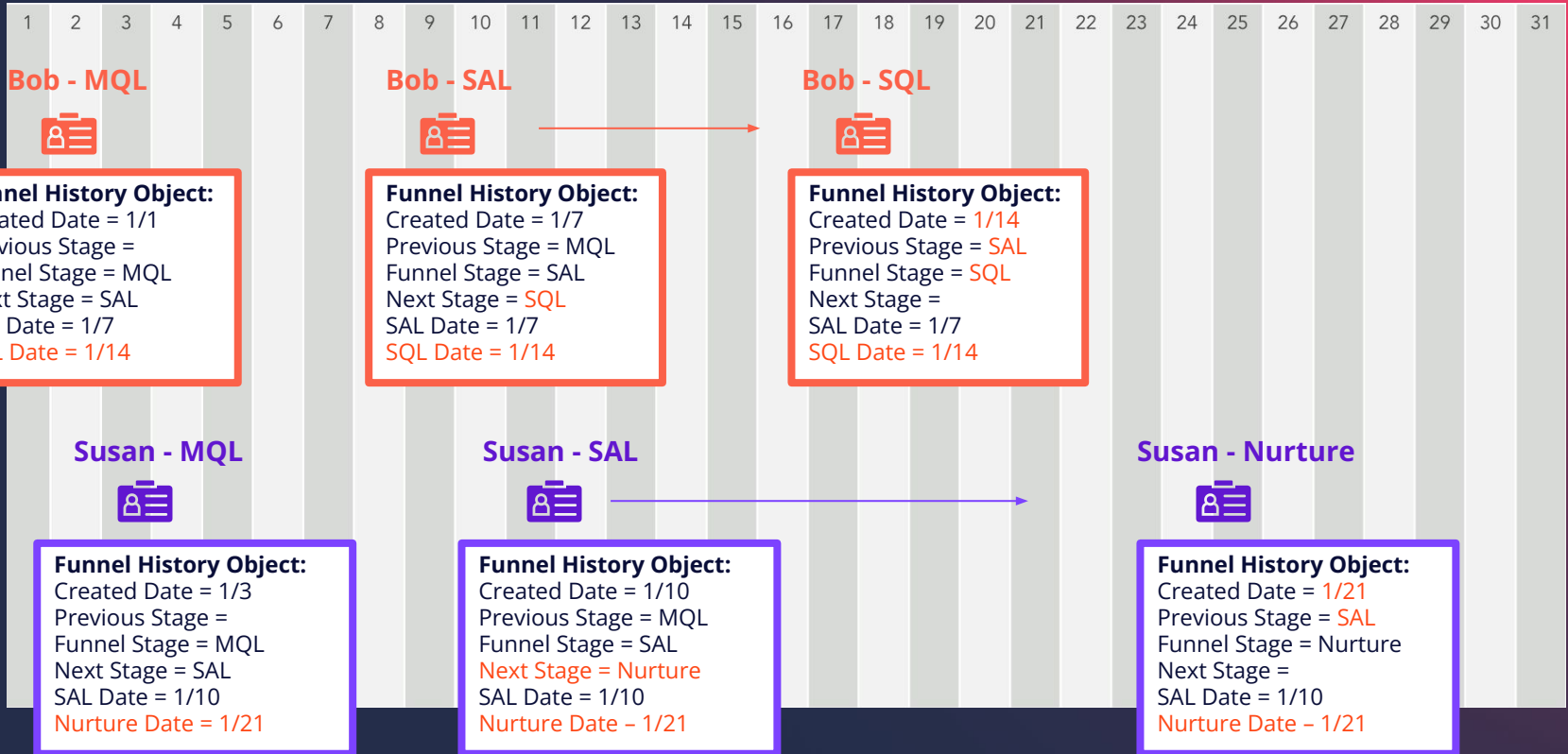
# And so on...

January

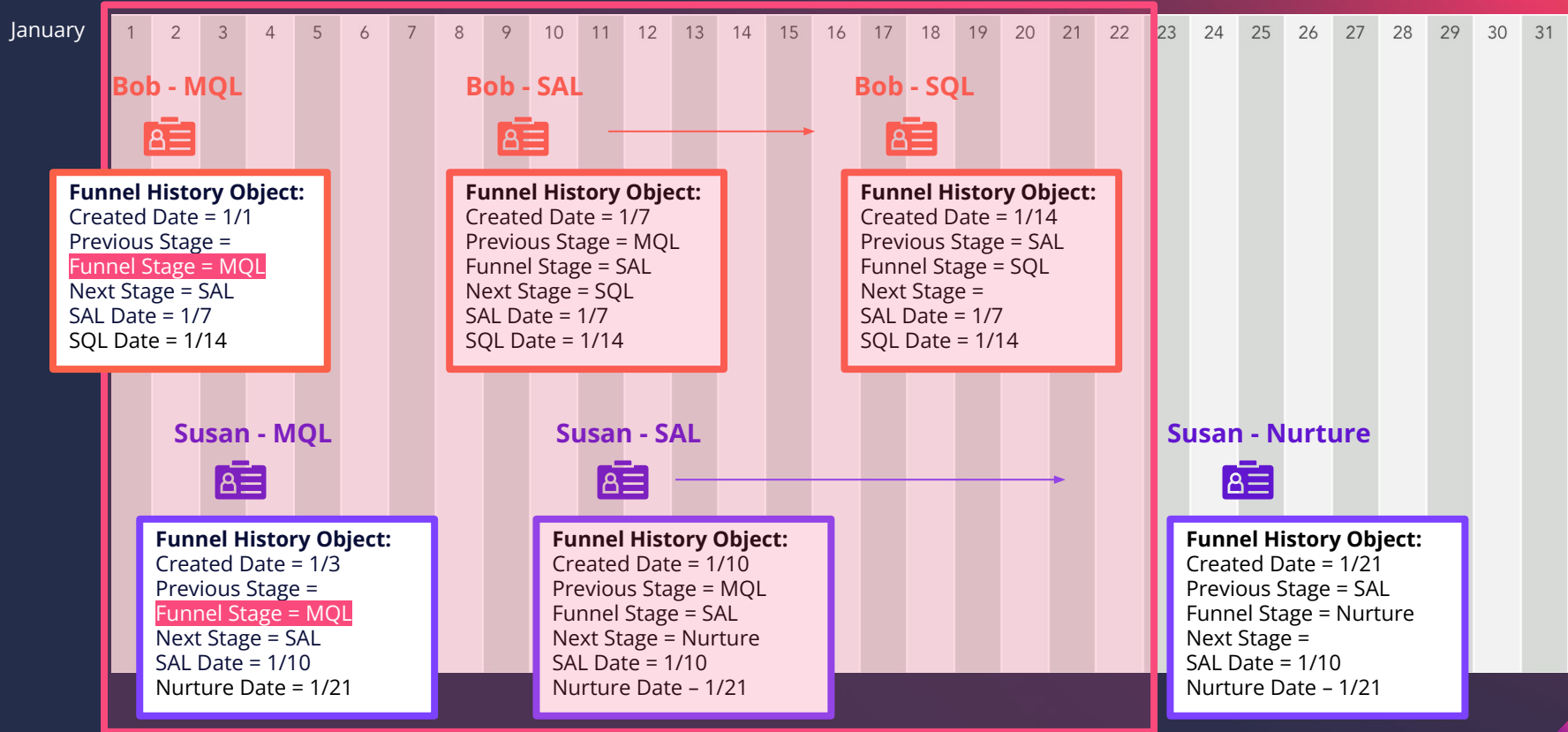


# And so on...

January



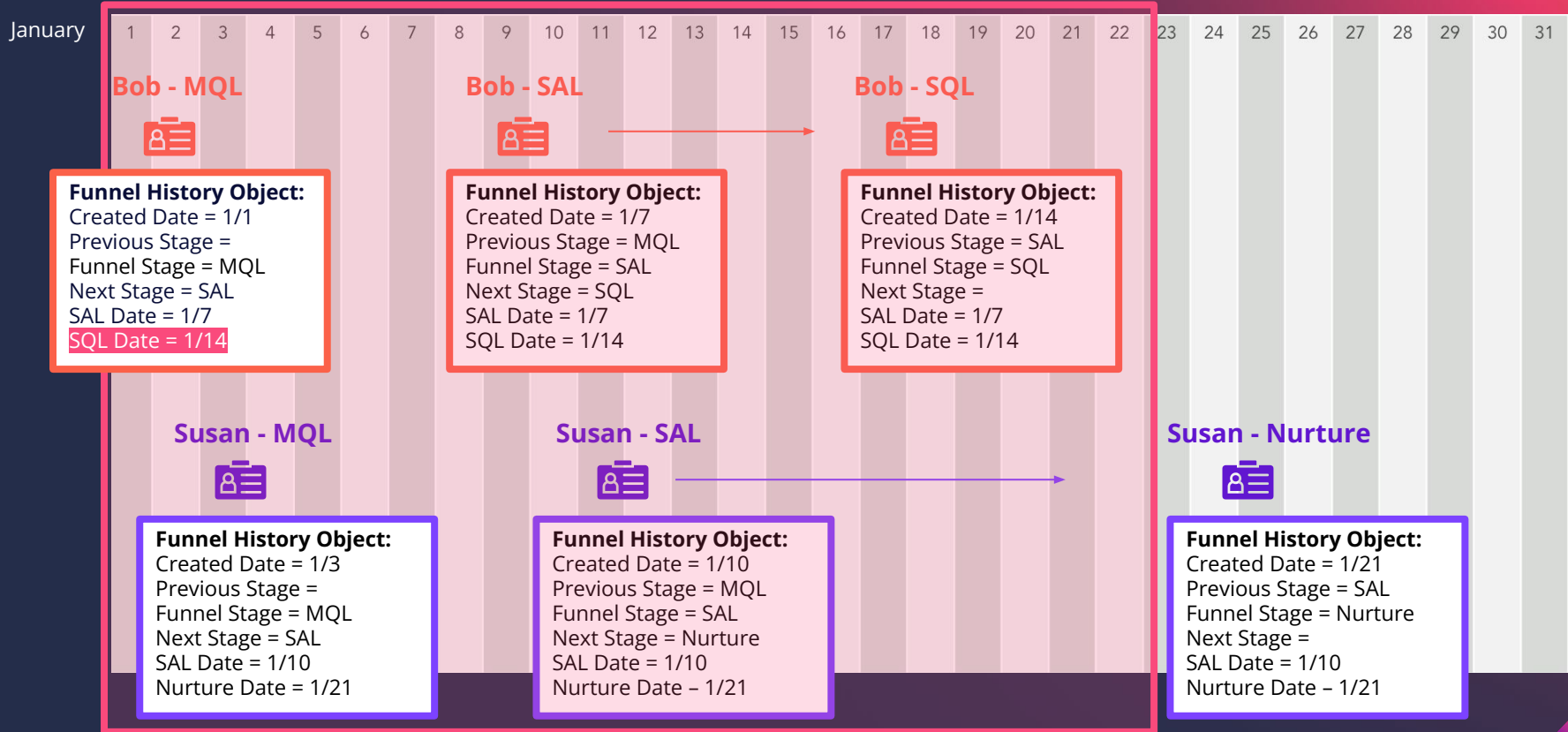
# This allows you to **report** when leads enter the funnel, and how quickly they convert



How many MQLs did we create Jan 1-18?



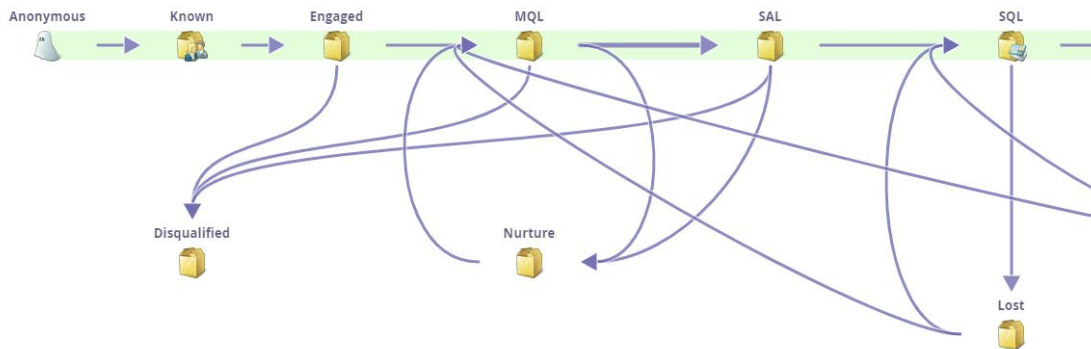
# This allows you to **report** when leads enter the funnel, and how quickly they convert



How many of the MQLs became SQLs?



# Here's how you actually do it

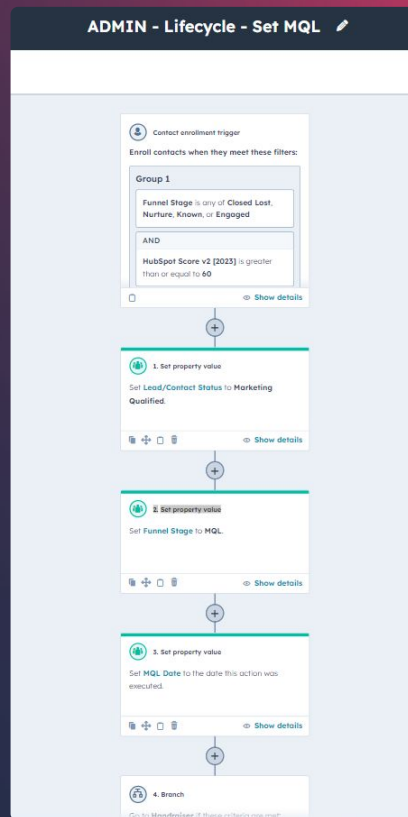


- Lead Lifecycle
  - Campaigns
    - 00-Initial Field Population
      - 00-Initial Field Population
    - 01-Success Path
      - 00-New Person Processing
      - 01-Engaged
      - 02-MQL
      - 03-ADR Accepted
      - 04-ADR Qualifying Lead
      - 05-Opp
    - 02-Detours
      - 01-SAL > Nurture
    - Send Alerts
    - Local Assets



# Here's how you actually do it


<input type="checkbox"/>	NAME
<input type="checkbox"/>	ADMIN - Manual Customer
<input type="checkbox"/>	ADMIN - Lifecycle - Set MQL
<input type="checkbox"/>	ADMIN - Lifecycle - Set Known Date
<input type="checkbox"/>	ADMIN - Lifecycle - Set Initial Funnel Stage (ongoing)
<input type="checkbox"/>	ADMIN - Lifecycle - Set Engaged
<input type="checkbox"/>	ADMIN - Lifecycle - Set Customer
<input type="checkbox"/>	ADMIN - Lifecycle - Set Closed Lost
<input type="checkbox"/>	ADMIN - Lifecycle - SAL/SGL > Nurture
<input type="checkbox"/>	ADMIN - Lifecycle - Initial Population
<input type="checkbox"/>	ADMIN - Lifecycle - Churned Customer





# Here's how you actually do it

Flow Definitions

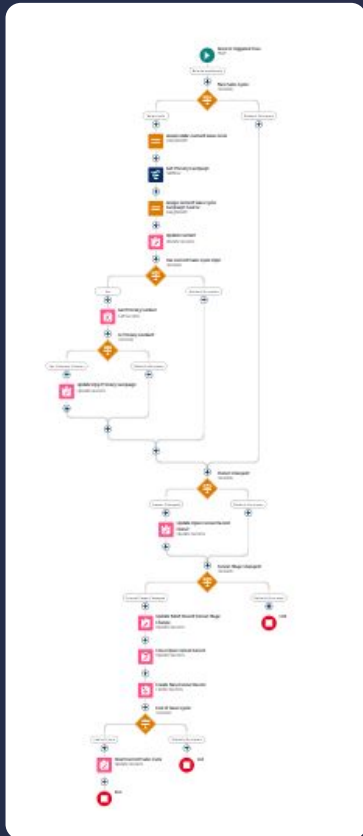
**All Flows** ▾ 

17 items • Sorted by Flow Label • Filtered by All flow definitions - Flow Label, Active • Updated a fe

Flow Label ↑
Account - After Save - Update Contact Lifecycle Stage for Active Customer
Contact - After Save - Process Lifecycle Stage Changes
Contact - Before Delete - Delete Lifecycle History
Contact - Lifecycle - Set Incubate
Contact - Lifecycle - Set MQL (Subflow)
Contact - Lifecycle - Set Raw/Opportunity Won
Contact - Lifecycle - Set Stage Date
Contact - Lifecycle - Set Unqualified
Lead - After Save - Process Lifecycle Stage Changes
Lead - Before Delete - Delete Lifecycle History
Lifecycle History - After Insert - Process Milestones
Lifecycle History - Before Save - Populate Initial Assigned To If Blank
Lifecycle History - Clone and Back Date Record
Opportunity - After Save - Lifecycle - Process Stage Changes
Opportunity - Lifecycle - Set Contact Role Status/Lifecycle Stage



# No code required\*



Lead Score This Stage	
Primary Campaign Source utm_medium	
Primary Campaign Source utm_source	
Primary Campaign Source utm_campaign	
Primary Campaign Source utm_content	
Primary Campaign Source utm_term	
SYSTEM - First Touch This Stage Final	
SYSTEM - Calls This Stage Final	
SYSTEM - Emails This Stage Final	
SYSTEM - First Touch SLA Compliant	<input type="checkbox"/>
SYSTEM - Follow Up SLA Compliant	<input type="checkbox"/>
Calls This Stage	0
Emails This Stage	0
First Touch This Stage	
First Touch SLA Flag	



**The reporting is magic...**




# Volume and Inventory

 Report: Funnel History - Custom  
**Funnel History by Month**

 This report has more results than we can show (up to 2,000 rows).

Total Records  
6,091

Created Date →	April 2020	May 2020	June 2020	Total
<input type="checkbox"/> Funnel Stage ↑	Count	Count	Count	Count
<input type="checkbox"/> Disqualified	258	70	12	340
<input type="checkbox"/> Nurture	95	21	10	126
<input type="checkbox"/> Closed Lost	8	12	0	20
<input type="checkbox"/> Engaged	3,554	976	411	4,941
<input type="checkbox"/> MQL	129	262	8	399
<input type="checkbox"/> SQL	82	44	58	184
<input type="checkbox"/> Opportunity	23	33	11	67
<input type="checkbox"/> Customer	2	6	6	14
<b>Total</b>	<b>4,151</b>	<b>1,424</b>	<b>516</b>	<b>6,091</b>

 Report: Funnel History - Custom  
**Funnel History - Active Inventory**

Total Count  
91,006

<input type="checkbox"/> Current Funnel Stage ↑	<i>fx</i> Total Count ↓
<input type="checkbox"/> -	1
<input type="checkbox"/> Closed Lost	84
<input type="checkbox"/> Contacts/Lists	111
<input type="checkbox"/> Customer	320
<input type="checkbox"/> Disqualified	2,215
<input type="checkbox"/> Engaged	87,208
<input type="checkbox"/> MQL	423
<input type="checkbox"/> Nurture	432
<input type="checkbox"/> Opportunity	47
<input type="checkbox"/> SQL	165
<b>Total</b>	<b>91,006</b>



# Conversion and Velocity

Report: Funnel History - Custom  
**Funnel Conversion - Created This Q**

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records: 6,092    Average Age in Days: 42.54    Stage Change Rate: -

Next Funnel Stage →	Disqualified			Nurture			Closed Lost			Engaged			SQL		
Funnel Stage ↑	Average Age in Days	Stage Change Rate	Count	Average Age in Days	Stage Change Rate	Count	Average Age in Days	Stage Change Rate	Count	Average Age in Days	Stage Change Rate	Count	Average Age in Days	Stage Change Rate	Count
Disqualified	51.43	98.53%	335	0.00	0.00%	0	28.41	0.88%	3	0.00	0.00%	0	0.00	0.00%	0
Nurture	49.89	100.00%	126	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0
Closed Lost	38.60	100.00%	20	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0
Engaged	48.63	91.70%	4,531	2.98	0.59%	29	30.41	0.08%	4	0.00	0.00%	0	0.00	0.00%	0
SQL	28.86	57.39%	229	1.52	32.08%	128	30.43	1.00%	4	0.00	0.00%	0	0.00	0.00%	0
Opportunity	35.18	63.24%	117	1.56	2.70%	5	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0
Customer	21.87	35.82%	24	0.00	0.00%	0	0.00	0.00%	0	5.29	7.46%	5	0.00	1.49%	1
Customer	21.91	100.00%	14	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0
<b>Total</b>	<b>47.48</b>		<b>5,396</b>	<b>1.78</b>		<b>162</b>	<b>29.87</b>		<b>11</b>	<b>5.29</b>		<b>5</b>	<b>0.00</b>		<b>1</b>



# Campaign Performance

Report: Funnel History - Custom  
**Campaign Performance Report - This Qtr**

Total Records  
 27

	Funnel Stage →	Disqualified	Nurture	Closed Lost	MQL	SQL	Opportunity	Total
<input type="checkbox"/> Campaign Source: Type ↑	Campaign Source: Campaign Name ↑	Count	Count	Count	Count	Count	Count	Count
<input type="checkbox"/> Event	2020_6-11_Virtual Retail Happy Hour	0	0	0	0	1	0	1
	2020_DCN Summit	0	0	0	0	1	0	1
	2020_Outsell Video Series #1	0	0	0	0	0	1	1
	2020_Outsell Video Series #2	0	0	0	0	1	0	1
	Event-Code Conference-2019-06	0	0	1	0	0	0	1
	Event -VOICE-2019-07	0	0	1	0	0	0	1
	<b>Subtotal</b>		0	0	2	0	3	1
<input type="checkbox"/> Website	WC-2019-Product Mindset eBook	0	1	0	0	1	1	3
	<b>Subtotal</b>	0	1	0	0	1	1	3
<input type="checkbox"/> Online Advertisement	2019-Ad-AudioBook Other Source 10-11-19	0	0	0	1	1	0	2
	3rd-party-NLProduct Mindset-ebook-2020	0	0	0	0	1	0	1
	<b>Subtotal</b>	0	0	0	1	2	0	3
<input type="checkbox"/> Webinar	2020-Event_Virtual-WIL-May	0	0	0	0	1	0	1
	LinkedIn_On demand-Fortune webinar2019	1	0	0	0	0	0	1
	Upskill-Design-sprints-2020	0	0	0	0	1	0	1
	Upskill-Product-mindset-2020	0	0	0	0	1	0	1
	Webinar-2019-11-Fortune Webinar	0	0	1	0	0	0	1



2021 Bookings



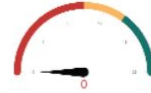
[View Report \(2021 Bookings\)](#)

2021 Employees Phase 1 Goal



[View Report \(2021 Employees Phase 1 Goal\)](#)

2021 Employees Phase 2 Goal



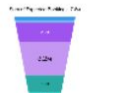
[View Report \(2021 Employees Phase 2 Goal\)](#)

Weighted Funnel by Stage - 2021



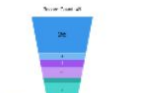
[View Report \(Weighted Funnel by Stage - 2021\)](#)

2021 Weighted Funnel by Stage - Expected Revenue



[View Report \(Weighted Funnel by Stage - 2021\)](#)

2021 Weighted Funnel by Stage - # Deals



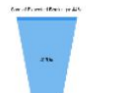
[View Report \(Weighted Funnel by Stage - 2021\)](#)

Weighted Funnel by Stage - 2022



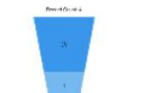
[View Report \(Weighted Funnel by Stage - 2022\)](#)

2022 Weighted Funnel by Stage - Expected Revenue



[View Report \(Weighted Funnel by Stage - 2022\)](#)

2022 Weighted Funnel by Stage - # Deals



[View Report \(Weighted Funnel by Stage - 2022\)](#)

Closed This Month

Stage	Department Name	Amount
Phase	Building Phase 1	USD 15k
Phase	Phase 2 - Partner Inc	USD 15k
Phase	MISC Phase 1	USD 7k
Phase	2022 Q1 Phase 1	USD 7k
Phase	Other Hardware - Phase 1	USD 5k
		USD 51k

[View Report \(Closed This Month\)](#)

Closed This Month

Stage	Department Name	Amount
Closed Deal	Advanced Health Services Phase 2	USD 51k

[View Report \(Closed This Month\)](#)

Open Pipeline Closing Soon

Stage	Department Name	Amount	Closed Date
Legal Review	CAACIC - Phase 2	USD 50k	6/30/2021
		USD 50k	

[View Report \(Open Pipeline Closing Soon\)](#)

Sales Meetings This Month & Next Month

Date	New This Month?	Assigned	Company / Account	Content	Subject
10/23/21	Yes	Devika Verma	Global Healthcare Research	Jonathan Bostick	DefPlan vs GHR - Introduction
10/23/21	Yes	Madeline Hayden	Global Healthcare Research	Jonathan Bostick	DefPlan vs GHR - Introduction
10/23/21	No	Rohan Bapat	The Frank Market Inc	Praveen Rao	Meeting DefPlan vs The Frank Market
10/23/21	Yes	John Williamson	CGS&S Corporation	John Bostick	HR - Analytics Plan - S&S & Revenue Stream
10/23/21	Yes	Harish Lakshmi	Cloudify Security - Global	Madeline Hayden	Meeting
10/23/21	No	Devika Verma	Bankia Corporation	Devika Verma	One Week Client Onboarding and Service Terms, DefPlan Updates, Executive Summary

[View Report \(Sales Meetings\)](#)

Q3 Engaged Leads



[View Report \(Engaged Leads - This Quarter\)](#)

Q3 MQLs



[View Report \(MQLs - This Quarter\)](#)

Q3 Meetings Held



[View Report \(Meetings Held - This Quarter\)](#)

Q3 SQLs



[View Report \(SQLs - This Quarter\)](#)

Q3 Marketing Campaigns



[View Report \(Marketing Campaigns - This Quarter\)](#)

Q3 SDR Calls



[View Report \(SDR Activities - This Quarter - Calls\)](#)

Q3 SDR Connects



[View Report \(SDR Activities - This Quarter - Connects\)](#)





Report: Lifecycle History - Custom  
**MLQ to SAL Conversion by SLA**

Total Records  
**518**

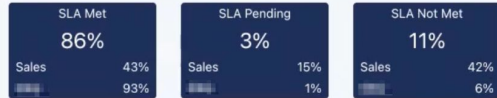
First Touch SLA Flag	fx Converted to SAL? →	0.00	1.00	Total
<input type="checkbox"/>	Record Count	306	77	383
<input type="checkbox"/>	Record Count			
<input type="checkbox"/>	Record Count			
<b>Total</b>	Record Count			

Lead Assignment & Management

Data updated: Today at 10:07 AM

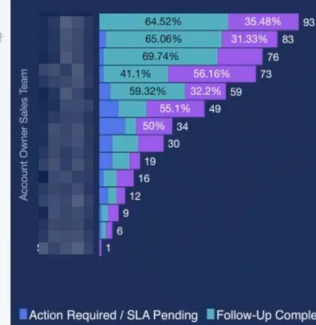
Lead Status All	SLA Flag All	Parent Campaign All	Campaign Name All	Lead/Contact Owner All	Lead / Contact Sales Team All	Owner's Manager All
Lead/Contact Name All	Legacy BU All	Top Line Bucket All	XDR All	Account Owner All	Account Sales Team All	Account Owner's Manager All

Overall SLA Compliance Percentage

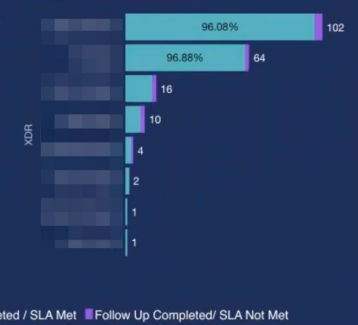


SLA Details by Rep

Compliance by Sales Team

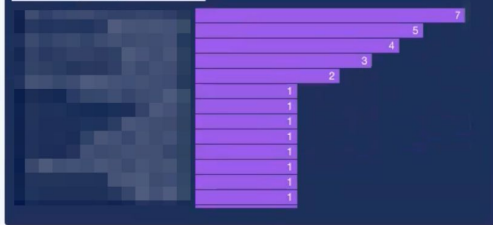


Compliance by Rep



Analysis By: Company

Action Required / SLA Pending



Name	Company / Account	SLA Flag	Lead Status	Lead Owner Name	XDR	MQL Date	XAL Date	SAL Date	Rep Assignment	Account C
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**Is all of this really necessary?**



# Maybe not? It's not for everyone...

- Other options might be enough
- Definite learning curve
- Potential storage concerns—at least one custom object record per Lead/Contact
- Maintenance and updates

BUT...

- You may eventually outgrow a "lesser" solution
- Tech debt, resistance to change, etc.
- Pretty much impossible to backfill after the fact—it's Day 1 all over again 😞😞😞

# Tricks for Success

- Get the whole team involved, cover all your edge cases before you get started.
- Test *thoroughly* in sandbox before moving to production
- If this is new, it probably won't be perfect the first time. Will need some iteration and someone to monitor reports.
- Reporting starter pack - **LOCKED DOWN** - one place for standardized general reports.
  - Do reporting discovery and training
  - Add notes on your reports and dashboards—what questions this report answers, etc.
  - STRONGLY recommend a Dashboard of Zero

# Extra Resources

- [Funnel Custom Object Overview](#)
- [5 Reports to Measure Funnel Performance](#)
- [Benchmarks for B2B Funnel Conversion Rates](#)
- [Salesforce Dashboard Examples](#)
- [Sample Lead Management Models](#)
- [Salesforce Package to Stamp UTMs on Campaign Members](#)
- [How to Structure Salesforce Campaigns for Attribution](#)
- [Sales Funnel ROI Calculator](#)
- [How to Build an SLA Alert in Salesforce](#)
- [How to Measure Lead Follow Up Beyond First Touch](#)
- [RevOps FM - A Scalable Solution to B2B Funnel Tracking](#)



# THANK YOU



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