

# Product Documentation

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# 1 At a Glance

The challenge in today's Marketing and Sales environment is to support a personal and meaningful customer experience from start to finish. This not only requires a deep understanding of one's customers, but also the ability respond to customer needs by providing valuable information at every point along the customer journey. Technology can offer tremendous support to Marketing and Sales by providing the right data that can drive the right actions at the right time.

OneInsight brings the data richness of Marketo to any CRM or other third party system and places it at the fingertips of the business development and sales organization. OneInsight's actionable, transformational knowledge about the customer enables true marketing and sales alignment and unlocks the full potential of Marketo-driven lead management.

OneInsight is a dashboard that is displayed natively in a browser window or in an iframe within a CRM or other third-party system for business development and sales teams. OneInsight provides insight into the most valuable people to drive leads and opportunities by giving visibility to data such as best bets, milestone activities, email, web and form interactions as well as scoring changes.

## 2 Product Documentation

### 2.1 Terminology

#### 2.1.1 Relative Urgency



The exclamation marks (Urgency) show how much a person's score has changed recently. A high urgency (more exclamation marks) indicates that this person's score has recently increased significantly, whereas a low urgency shows that the person had few interactions.

Sales reps can use the urgency of a person to prioritize who should be contacted next.

#### 2.1.2 Relative Score



The stars represent relative score and show how this person's score compares to everyone else's score in the database. A high relative score indicates that this person is most likely more interested and informed about the company's offer as compared to other people in the database with lower relative scores.

If two persons have the same relative urgency, the relative score can be used to tell which one should be contacted first.

Relative urgency and relative score are automatically recalculated every night on Marketo servers. To calculate the number of stars and exclamation marks, persons are sorted by score or score change and then divided into tiers — the top tier receives the most stars or exclamation marks, the next receives fewer, and so on ([Marketo Docs](#)).

### 2.1.3 Frequent Interactions

Frequent Web Interactions 	
7 CLICKS / 6 VISITS	<a href="http://www.company.com/webpage.html">www.company.com/webpage.html</a>
2 CLICKS / 3 VISITS	<a href="http://www.company.com/webpage2.html">www.company.com/webpage2.html</a>
2 CLICKS / 2 VISITS	<a href="http://www.company.com/products/product1.html">www.company.com/products/product1.html</a>
1 CLICKS / 3 VISITS	<a href="http://pages.company.com/micro-site.html">pages.company.com/micro-site.html</a>

Frequent interactions are automatically generated on OneInsight's servers to give sales reps an overview of the best performing webpages, emails and forms for one person within the last 30 days.

OneInsight shows frequent interactions for web, email and form activities. The more a person interacts with one of the assets, the higher the asset will show in the list. This gives the sales reps a potential insight into the person's interests without having to scroll through all activities.

## 2.2 Interface

OneInsight provides sales reps with valuable information before they call or email a person. They can closely examine a person's details to see which emails they've opened and clicked, which specific web pages they have visited, the forms they've submitted and how their score is calculated. This can help the sales organization customize their messaging so that it is relevant to each person's interests.

The interface is accessible from any CRM system or other third party system and organizes activities into five groups — interesting moments, web, email, form and scoring. All activities are updated every 30 minutes and cached on OneInsight's servers to allow for seamless transition and provide sales reps a better user experience.

OneInsight allows different permissions and filter criterias to be set for each user and thus restrict which persons and activities a sales rep can access.

A chart of all activities shows the number of interactions a person had within the last 30 days.



## 2.2.1 Interesting Moments

**John Doe** ★☆☆ ▲▲▲▲

INTERESTING MOMENT URGENCY: VERY HIGH FORM SCORING

**Latest Interesting Moments Activities**

<b>15</b> NOV	<ul style="list-style-type: none"> <li><span style="font-size: 0.8em;">MILESTONE</span> This contact is interested in product "Lorem Ipsum"</li> <li><span style="font-size: 0.8em;">MILESTONE</span> This contact visited multiple key webpages at least 3 times indicating an interest in product "Lorem Ipsum"</li> </ul>
<b>06</b> NOV	<ul style="list-style-type: none"> <li><span style="font-size: 0.8em;">MILESTONE</span> This is a fast track MQP generated by a Marketo campaign. This MQP left a request for a demo or a message on Marketo form: "Lorem Ipsum dolor sit amet consequtor"</li> <li><span style="font-size: 0.8em;">MILESTONE</span> Lorem Ipsum dolor sit amet consequtor lorem dolor sit amet consequtor</li> <li><span style="font-size: 0.8em;">WEB</span> Visited at least 3 web pages in 1 day</li> </ul>
<b>30</b> OCT	<ul style="list-style-type: none"> <li><span style="font-size: 0.8em;">WEB</span> Visited at least 3 web pages in 1 day</li> </ul>
<b>26</b> OCT	<ul style="list-style-type: none"> <li><span style="font-size: 0.8em;">MILESTONE</span> This contact registered for a webinar indicating an interest in the following product: "Lorem Ipsum"</li> </ul>

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Interesting moments allow the marketing department to communicate with the sales team through OneInsight. Marketers can create interesting moments for various key interactions and give the business development and sales team a better understanding of a person’s potential interest and preferences.

## 2.2.2 Web

**Latest Web Activities**

**15**  
NOV

VISIT [www.company.com/products/product1.html](http://www.company.com/products/product1.html)

📄 <http://www.company.com/products/prod...> 📅 15 Nov 2017, 21:33 🖥️ Windows Chrome(58.0.3029.96)

^

Marketo allows for tracking of webpage visits and clicks to Marketo landing pages and

external web pages such as a company's webpage. Companies can also create a customized tracking on webpages for e.g. videos. OneInsight shows all web activities ordered by date in a list and provides additional information for each web activity:

1. Link to the visited webpage or link that was clicked
2. Date of the activity
3. Information about the browser that the person used

### 2.2.3 Email



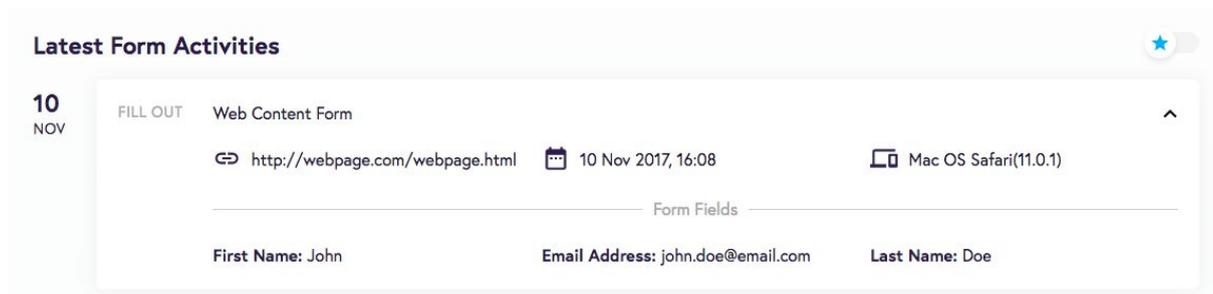
By default, all emails that are sent from Marketo are tracked. This gives sales reps an overview what material was already sent to the person and what content performed best (see frequent interactions ([section 2.1.3](#))). If the person opened or clicked on an email, that indicates a higher level of engagement for that topic.

Sales reps can also see a preview of every email that was sent out from Marketo. The preview email functionality is unavailable if e.g. the email was already deleted in Marketo.

All these email activities are shown in OneInsight and include the following:

1. Email opens and clicks
2. Delivery of emails
3. Hard and soft bounces
4. Unsubscribes

## 2.2.4 Form



**Latest Form Activities**

**10 NOV** FILL OUT Web Content Form

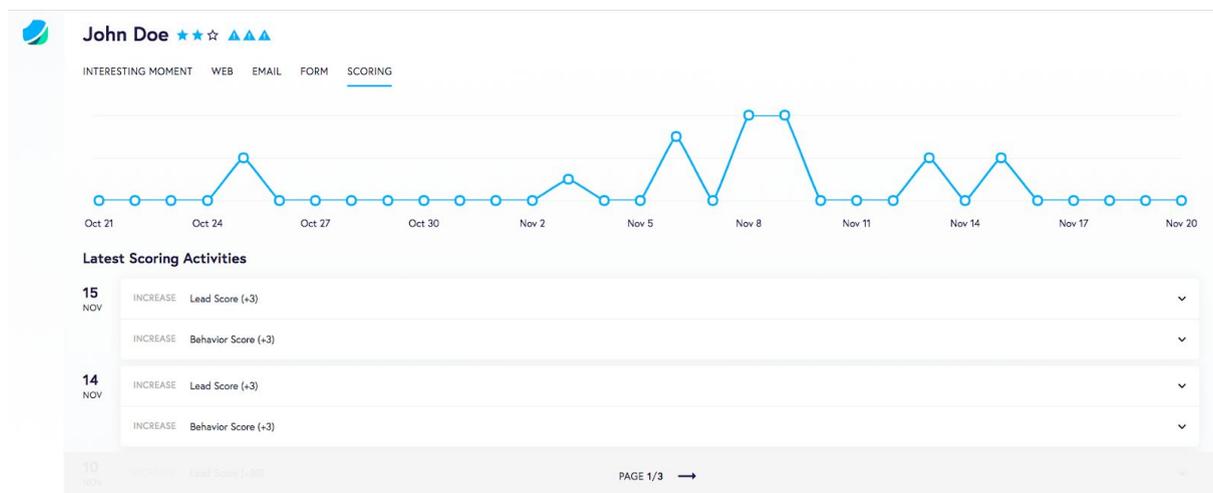
↳ http://webpage.com/webpage.html 10 Nov 2017, 16:08 Mac OS Safari(11.0.1)

Form Fields

First Name: John      Email Address: john.doe@email.com      Last Name: Doe

Marketo Forms are one way to generate new names or update existing information of specific persons. In addition to a link to the form, the date and time of the form submit and some information about the browser, OneInsight also displays what information the person filled in.

## 2.2.5 Scoring



**John Doe** ★☆☆ ▲▲▲

INTERESTING MOMENT WEB EMAIL FORM SCORING

Line chart showing scoring activity from Oct 21 to Nov 20.

**Latest Scoring Activities**

<b>15 NOV</b>	INCREASE	Lead Score (+3)
	INCREASE	Behavior Score (+3)
<b>14 NOV</b>	INCREASE	Lead Score (+3)
	INCREASE	Behavior Score (+3)

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Scoring is the key to delivering high-quality people to Sales. OneInsight does not only show the relative score and urgency (see [section 2.1.1](#) and [2.1.2](#)) but also what caused the change in score and how the score changed over time.

## 2.2.6 Campaigns

OneInsight does not only allow Sales Reps to see a variety of activities but also to run specific campaigns in Marketo. All campaigns that a Sales Rep can see are defined on a global level and can perform any tasks that Marketo offers, e.g. adding persons to a list, sending emails or even perform more complex tasks in a webhook.

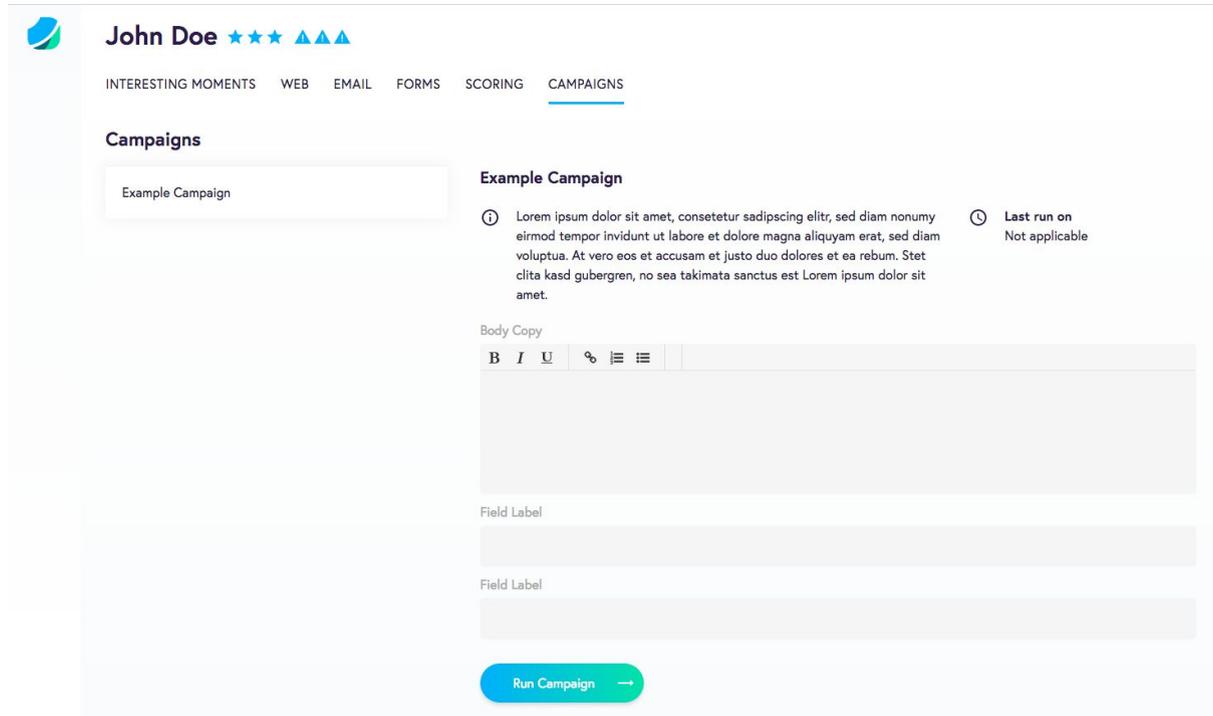
OneInsight also supports using tokens to further personalize emails or perform a number of other options.

As OneInsight leverages Marketo emails for sendouts, all emails are tracked by default and the respective email activities will show up in OneInsight shortly they are sent. Please be aware that due to limitations in Marketo, links within rich text tokens will not be tracked. For more information or workarounds, please see [this post in the Marketo community](#).

Please note that while we are working on an admin interface to configure OneInsight and set up campaigns, you can contact support to add campaigns to OneInsight and specify the information listed below.

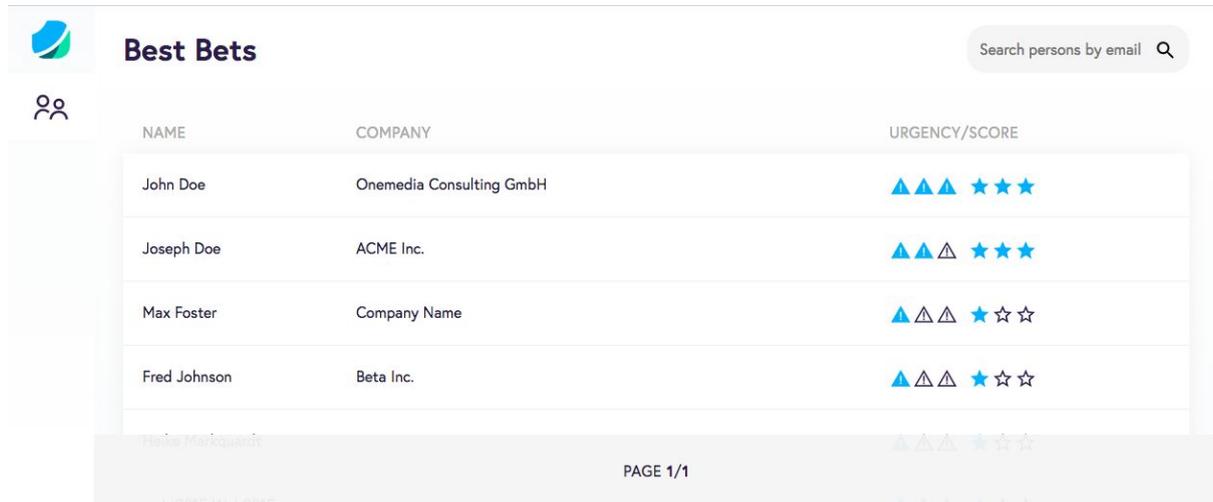
- Name of the campaign that will be shown in OneInsight
- Short description of what the smart campaign does
- The unique ID or URL of the smart campaign in Marketo
- Token Names *(optional)*
- Token Types *(optional)*: OneInsight currently supports rich text and text tokens. Support for more types will be added in a future version.
- Token Attributes *(optional)*: OneInsight will support mandatory/optional tokens and will also be able to set a default value.

All smart campaigns that should be added to OneInsight need at least a *“Campaign is requested”* trigger with a *“Source [is] Web Service API”* constraint. Additional filters or triggers are possible but might limit the execution of the campaign for certain people.



## 2.2.7 Best Bets

Best Bets are persons with the highest urgency and relative score and are regularly updated in OneInsight.



NAME	COMPANY	URGENCY/SCORE
John Doe	Onedia Consulting GmbH	▲▲▲▲ ★★★★★
Joseph Doe	ACME Inc.	▲▲▲▲ ★★★★★
Max Foster	Company Name	▲▲▲▲ ★☆☆☆☆
Fred Johnson	Beta Inc.	▲▲▲▲ ★☆☆☆☆

## 2.3 Integration

OneInsight currently accepts two integration methods for access by sales reps. Both methods involve generating a link on a person based object (e.g. lead, contact) for every person (i.e, every contact or lead) in the following format:

[https://app.oneinsight.io/discover?email=EMAIL\\_ADDRESS](https://app.oneinsight.io/discover?email=EMAIL_ADDRESS)

*Note: EMAIL\_ADDRESS needs to be replaced with the email address of the contact or lead in the CRM system. OneInsight also supports custom deduplication logics in Marketo with alternative or additional identifiers.*

### 2.3.1 Method 1: Link

The generated link can be shown on the contact or lead detail page in the CRM. By clicking on this link, sales reps will be redirected to OneInsight where they will be able to see all activities after logging in (if the previous session has expired).

### 2.3.2 Method 2: iFrame

If OneInsight should be displayed directly in the CRM system, it's necessary to use an iFrame that can be implemented with the following HTML code:

```
<iframe src="ONEINSIGHT_LINK" width="100%" height="500"
frameborder="0"></iframe>
```

*Note: Iframe parameters can be altered and ONEINSIGHT\_LINK needs to be replaced with the generated link that is unique to each contact or lead in the CRM system.*