

Marketing Event Process Optimization for SOS / Forsythe

General suggestions for event optimization and ROI tracking improvements.

Developmental details of Salesforce Labs freeware and customized application solutions designed to track Co-Op or MDF P/L via dashboards.

Revision History

Revision	Author	Date	Notes
CS1	Aaron Janssen , Security Solutions Architect	9/19/2014	First version of Forsythe Salesforce Suggestions & Solutions (Marketing Events ROI). Forwarded to Randy Rice, Katheryn Burkhardt and Leslie for review.

Sections:

- 1) Campaigns and Child Campaigns (Forsythe)
- 2) Opportunities (Forsythe)
- 3) Partners (Forsythe)
- 4) Job Details (Forsythe)
- 5) Marketing Data, Reports/ Dashboards (SOS)
- 6) Salesforce Labs (Dev)
- 7) Events (Dev)
- 8) Co-Op Marketing Funds (Dev)
- 9) SOS Marketing Event RIO (SOS, Dev)
- 10) Event Reports / Dashboards (Dev)

Goals of this document: This document details a number of recommendations for improvements in marketing events (such as ROI Data) and operations processes within Forsythe's Salesforce.com organizational instance and will hereafter be referred to as the 'Forsythe' Org. SOS Security's Salesforce.com organizational instance will hereafter be referred to as the 'SOS' Org. Aaron Janssen's development Salesforce.com organizational instance will hereafter be referred to as the 'Dev' Org.

Presumptions: This assessment is conducted exclusively from a [Forsythe Product Specialist Profile](#) perspective; many fields, lists, views, tabs, objects and apps may be hidden to the profile view and therefore suppositions made as to existing Forsythe Org functionality may prove to be incorrect. For instance there are Campaign Members lists that are not visible to us. Research indicated that tracking to the customer/lead/account level was previously abandoned by Forsythe in favor of an account only focus.

Assessment: The current Salesforce configuration does not provide adequate campaign to marketing event fund accountability, auditing functionality, ROI statistics, executive dashboard reporting functionality nor automation of error prone repetitive data entry processes. Campaign/Opportunity/Partner/Job Details object linking is incomplete and needs to be strategically redesigned. Reports lack relevance, the marketing dashboards and all campaign-to-event metrics will need to be re-calculated to obtain the true ROI.

Plan: Review and approval by the Forsythe Salesforce Change Control Board => Download freeware Salesforce apps from the App Exchange and apply Forsythe customizations => Train staff => Event ROI.

Summary: Multiple nested campaigns are used instead of event level tracking, the resulting data set does not meet the desired outcome. Information needs to flow easily from the events in the field to the marketing department to provide partner Co-Op fund accountability and renewal of their support next year.

A flurry of poorly attended events can reduce the impact of each event and diminishes the exclusivity of the Forsythe brand. I have been to half a dozen events recently which have been routinely populated by already completely vetted non-productive repeat leads, they are literally looking for the next free lunch. This group is known as the 'OC Frequent Flyers', these leads will likely never become active customers (I.e. successfully converted to Contacts at Accounts). Forsythe could leverage the contact information being supplied to the Co-Op partners rather than simply attaching an attendees Excel spreadsheet to a Campaign.

The Campaign Members mailing list could be scrubbed and focused by event objective to various verticals. An example, such as a PCI for Senior Decision Makers Seminar, should be sent to leads with the 'Retail' classification and to current contacts (Director, VP or CIOs) with an annual IT spend of more than 5% or \$100,000. This level of tuning would need to be an on-going process and require attention to detail.

Tight alignment with Forsythe corporate goals and executive sponsorship of the recommendations is required.

1. [Campaigns](#) and Child Campaigns (Forsythe)

a. Campaigns

- i. Campaigns are used to manage Co-Op and Marketing Discretionary Fund (MDF) events. Each Marketing event is assigned as unique Campaign, [SOS-Brews and Bytes – Costa Mesa, CA](#) is an example of a single event co-sponsored by a Partner named [Centrify](#).

Campaign

SOS-Brews & Bytes -Costa Mesa, CA

Customize Page | Printable View

Show Feed

« Back to List: Price Books

Attachments 0 | Opportunities 0 | Accounts 0

Campaign Detail

Advanced Setup

Campaign Owner	Denise Laughlin	Campaign Record Type	Campaign Activity: Solution Marketing/Field Marketing
Parent Campaign		Num Total Opportunities	0
Solution		Num Won Opportunities	0
Training Link		Total Value Opportunities	USD 0.00
		Total Value Won Opportunities	USD 0.00

▼ Activity Details

Campaign Name	SOS-Brews & Bytes -Costa Mesa, CA [View Hierarchy]
Activity Type	Regional Events
Activity Objective	How to deploy one-touch SSO for SaaS apps on mobile devices and workstations without replicating Active Directory (AD) in the cloud
Additional Notes	
Corporate Objective	
Start Date	6/19/2014
End Date	6/19/2014
Area	
Region	SOS

Custom Links

Mass Email Contacts

Created By [Denise Laughlin](#) 6/17/2014 3:19 PM

Last Modified By [Maggie White](#) 7/12/2014 6:04 PM

Advanced Setup

Attachments

No records to display

Opportunities

New Opportunity

No records to display

Accounts

New Connector Object

No records to display

b. Child Campaigns

- i. Campaigns are nested within each other to provide rollup information. Presumably this functionality allows for rollup of opportunities and ROI amounts of sub campaigns. This is a good approach however it lacks budgetary base lining, scheduling of venues, speakers and attendees.

c. Dashboards / Reporting

- i. There is a [Forsythe Marketing Dashboard](#) which has not been refreshed since 9:54 PM on March 6, 2014 indicating that it is not a followed metric.

Marketing Dashboard

Show Feed

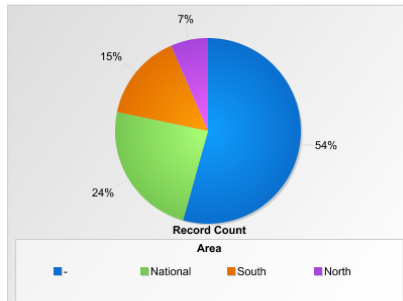
Find a dashboard...

Clone

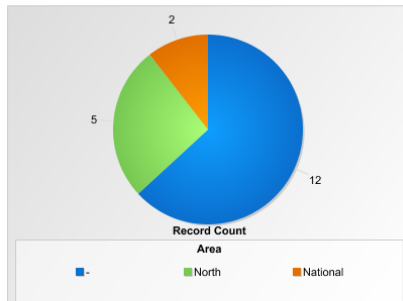
Refresh

As of March 6, 2014 at 9:54 PM

Campaign Count by Area (Previous 15 months)



Opportunity Count for Campaigns started in Previous 15 months by Area



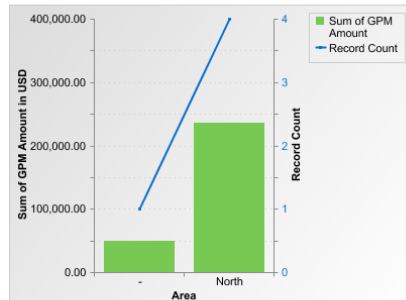
Won Opportunity Count for Campaigns started in Previous 15 months by Area

Opportunity Pipeline for Campaigns started in Previous 15 months by Area

Area	Sum of GPM Amount
North	360K
North	100K
National	25K

Opportunity Pipeline (open opportunities) Created from a Campaign started in previous 15 months breakdown by Area

Won Opportunity GPM for Campaigns started in Previous 15 months by Area

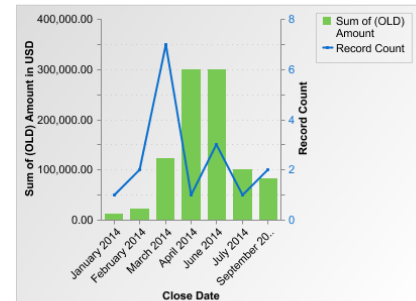


Campaign Pipeline by Stage

Stage	Sum of GPM Amount
Dead/Disqualified	365K
Closed/Won	286K
Closed/Lost	200K
Qualified Prospect	100K
Suspect	20K

Campaign (started in previous 15 months) pipeline breakdown by stage

GPM of Qualified Marketing Opportunities



Lead Source Record Count

Create Date	Record Count
January 2013	6
February 2013	7
March 2013	7
April 2013	1
May 2013	6
June 2013	4
July 2013	1
August 2013	2
September 2013	4
October 2013	9
November 2013	6
December 2013	4
January 2014	9
February 2014	8
March 2014	2

Marketing leads from current and previous fiscal year by lead source

Top Campaigns with Largest GPM Won for Previous 15

2. Opportunities (Forsythe)

- Opportunities are currently not linked to Job Details, this prevents Event ROI from being created.

Opportunity

Opus Bank: Managed Security Services

Customize Page | Printable View | Help

Show Feed

Back to List: Profiles

Opportunity Field History (5+) | Forsythe Products (1) | Quote Requests (0) | Opportunity Team (0) | Notes & Attachments (0) | Open Activities (0) | Activity History (0) | Project (0) | Contact Roles (0) | Competitors (0) | Red Adair (0) | Campaign In

Opportunity Detail

EditCloneSharingAdd FollowersPush_Opp_OA

Opportunity Owner	Rex Tumminia [Change]	Close Date	10/15/2014
Opportunity Name	Opus Bank: Managed Security Services	Stage	Prospect
Account Name	Opus Bank	Probability (%)	20%
Lead Source	Event/Seminar/Tradeshaw	Forecast Category	Upside
Opportunity SF ID	SF1407121092	Total GPM	USD 15,000.00
Pursuit Lead			

Description Information

Next Step

Description

Pain/Consequences

Additional Information

Initial Opportunity	Primary Campaign Source	Cisco Security in the Hybrid Data Center Lunch and Learn Series
Deal ID	Segmentation Evolution Opportunity	
Customer PO #	Tech Evaluation Center	
Is this project in this year's budget?	International Opportunity	
Is it part of this year's OPEX or CAPEX?	Country	
Is this a potential lease / finance opp?	Country name	
Odds to close a lease or finance opp	2013 GAAP Eligible	
	Mentora Opportunity	

Campaign Influence

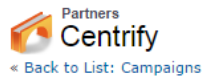
Add to Campaign

Campaign Influence Hel

Action	Campaign Name	Contact Name	Contact Role	Responded	Primary Campaign Source
Edit Del	Cisco Security in the Hybrid Data Center Lunch and Learn Series				✓

3. [Partners](#) (Forsythe)

- a. The Partners Object details each individual partner and includes Active Lists for Notes & Attachments and Contacts. The partner listed [Centrify](#), sponsored the Brews and Bytes event and will need data to continue sponsoring the series (I created the [ROI report](#) to demonstrate). There is no apparent lookup relationship to the Campaign, Opportunity or Job Details objects. The Forsythe Partner Portal is not in use and has not be configured since 2009 according to my research.



[Activity History](#) | [Notes & Attachments](#) | [Contacts](#) | [Related Content](#)

Partners Detail Edit Delete Clone

Partners Name	Centrify
---------------	----------

Forsythe LOB	Co-op Submission Type
FSG Business Owner	Partner Portal Address
FSG Marketing Owner	Offline Submission Info
Processing Owner	Expected Payment Type

Partner Marketing Manager	Cost Center
Partner Marketing Email	Balance Sheet Account
Partner Marketing Phone	Billing Customer Number

Partner Business Manager	
Business Manager Email	
Business Manager Phone	

Partner Technical Manager	
Technical Manager Email	
Technical Manager Phone	

Created By [Samantha Simpson](#) 7/26/2014 1:44 AM Last Modified By

Edit Delete Clone

Activity History Log a Call Mail Merge Send an Email

No records to display

Notes & Attachments New Note Attach File

No records to display

Contacts New Contact

No records to display

Related Content Find Content Search All Deliver Content

No records to display

4. Job Details (Forsythe)

- The Forsythe created, Job Details custom object, is used to manage Co-Op and MDF event fund requests and tracking. It has a look up relationship to the Campaigns Object, there appears to be an approval process as well. Currently an expenses 'place holder' number is entered and should be updated when the final expenses are completed. In the example below [SOS-Centrify Brews and Bites:13472](#), held on 6/19/2014 the place holder was \$5,000. None of the Centrify Job Details have ever been updated since the events with the actual amount. A total of \$50,300 was entered in Job Details for [Centrify](#), combined partner spending is currently unknown. Calculating ROI is not possible without this data.

Job Details

SOS-Centrify Brews & Bytes: 13472

Customize Page | Pi

[Back to List: Price Books](#)

Approval History (0) | Related Content (0) | Open Activities (0) | Activity History (1) | Notes & Attachments (0)

Job Details Detail

Edit Clone Submit for Approval

▼ Funding/Financial Snapshot

Status	Not Submitted	Project Manager	
Job Details Name	SOS-Centrify Brews & Bytes: 13472	Presenter	
Activity Type	Regional Events	Content Owner	
Marketing Vehicles		Regional Sponsor	
Message	None	LOB	Systems
Start Date		Staffing Required	<input type="checkbox"/>
End Date	6/19/2014	Class A Offering	Network Other
Activity Year	2014	Job Notes	
Activity Expenses	USD 5,000.00	Created By	Denise Laughlin, 6/17/2014 3:22 PM
Area	SOS	Last Modified By	Denise Laughlin, 6/17/2014 3:22 PM
Region	SOS		
City			

▼ Co-Op Team

Campaign Association SOS-Brews & Bytes -Costa Mesa, CA

Edit Clone Submit for Approval

Approval History

Submit for Approval

No records to display

Related Content

Find Content Search All Deliver Content

No records to display

Open Activities

New Task New Event

No records to display

Activity History

Log a Call Mail Merge Send an Email View All

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Project Manager POP Reminder Sent		✓	6/17/2014	Denise Laughlin	6/20/2014 12:07 AM

Notes & Attachments

New Note Attach File

No records to display

centrify

Search Job Details Options...

Job Details (8) Show Filters

Action	Job Details Name	Activity Expenses	Activity Year	End Date
Edit	SOS-Centrify Brews & Bytes: San Diego: 13617	USD 10,000.00	2014	10/23/2014
Edit	SOS Security - Centrify&FireEye Teenage Mutant Ninja Turtle Movie Premier 13530	USD 2,300.00	2014	11/7/2014
Edit	SOS-Centrify Brews & Bytes: 13472	USD 5,000.00	2014	6/19/2014
Edit	SOS-Centrify Brews & Bytes: Seattle13606	USD 3,000.00	2014	9/11/2014
Edit	SOS-Centrify Brews & Bytes SJ 8/28/14: 13598	USD 5,000.00	2014	11/28/2014
Edit	SOS-Centrify Brews & Bytes: Phoenix: 13612	USD 10,000.00	2014	10/8/2014
Edit	SOS-Centrify Brews & Bytes-Centrify, Las Vegas: 13613	USD 10,000.00	2014	10/9/2014
Edit	SOS-Centrify Brews & Bytes: Seattle13606	USD 5,000.00	2014	9/11/2014

(The Co-Op Program, Accrual Table and Partner Program Lists in Job Details are invisible to our profile)

Related Lists

Contacts				New
Name	Title	Phone	Email	
Sarah Sample	Sample Title	1-415-555-1212	sarah.sample@company.com	

Related Content

Title	Created Date	Last Modified Date
Sample Title	9/11/2014 6:18 PM	9/11/2014 6:18 PM

CoOp					New
CoOp Name	Status	Prior Amount	Claim Amount	Paid Amount	
Sample CoOp Name	Sample Status	USD 123.45	USD 123.45	USD 123.45	

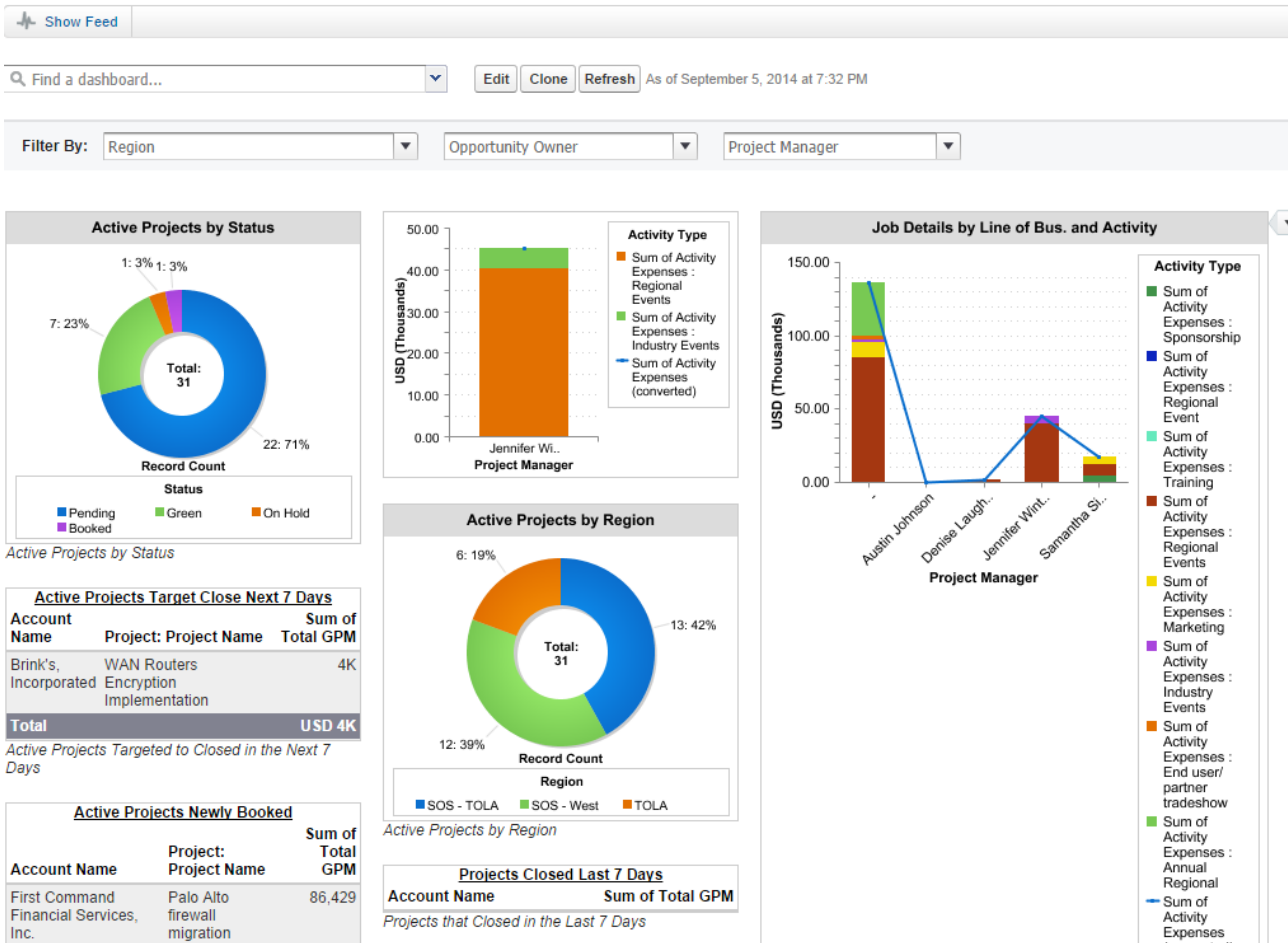
Accrual Table		New
Accrual Table Name	Available Funding	
Sample Accrual Table Name	USD 123.45	

Partner Programs		New
Partner Programs		
Sample Partner Programs		

5. Marketing Data, Reports/ Dashboards (SOS)

- a. There are no marketing dashboards that address ROI and a result, I have created a [SOS Job Details and Marketing Campaign ROI dashboard](#) to track ROI for marketing events.

SOS - Job Details and Marketing Campaign ROI



6. [Salesforce Labs \(Dev\)](#)

- a. I have a Salesforce development environment that I use to develop solutions and conduct research. I recently downloaded and customized several **FREE** Salesforce Labs Apps. Combined together they provide extensive capabilities and features that would save money and solve many problems Forsythe is facing today as it looks for instant ROI metrics.

- i. [Events 4.6](#) was originally developed by Salesforce to provide an events and registration solution for their developer conference called [DreamForce](#). It provides extensive event functionality such as MDF budgets, expenses, marketing development funds, venues with rooms & Google Maps links, speakers, tracks, attendees, registration, rooms complete reporting and dashboards built in. The [4.3 Change](#) Log is available on the App Exchange.

This App is significantly over-built for our requirements, but it is much easier to delete sections we will not use than trying to create them! The entire system works together P/L formulas, rollups, reporting and much more that would be time consuming and costly to develop ourselves.

- ii. [MDF and Co-Op](#) is a very simple App designed to facilitate Marketing Discretionary **AND** partner Co-Operative fund management. The [Datasheet](#) and [Customization Guide](#) are available as well on the Salesforce App Exchange.

This functionality is currently being provided by the Forsythe [Job Details](#) Custom Object but it does not provide budget management, MDF vs. Co-Op funding expiration enforcement or ROI accountability tracking.

7. [Events 4.6 \(Dev\)](#)

a. [Events](#)

Event

Shooting Range I

[Show Feed](#) [Click to add topics](#) [?](#)

[Back to List: Installed Package](#)

[Tracks \[0\]](#) | [Event Registrations \[1\]](#) | [Event Expenses \[1\]](#) | [Event Market Development Funds \[0\]](#) | [Notes & Attachments \[0\]](#) | [Opportunities \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

Event Detail

[Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#)

Event Name	Shooting Range I	Event Manager	Jen Winters
Region		Event Start Date	8/21/2014
Event Type	Executive Event	Event End Date	8/21/2014

Campaigns

Campaign	Opportunity
Contact	

Event Specifics

Maximum Registration #	30	Targeted Attendance	Casinos in Vegas
Registered Attendees	1	Final Attendance	15
Capacity Full	3.33%	Event Evaluation	

Venue & Vendor Information

Event Vendor Account	Venue Street Address #1
Primary Vendor Contact	Venue Street Address #2
Phone	Venue City
Venue	Venue State
Venue Status	Venue Postal Code
	Venue Country
	Map to Venue
	Google Map

General Information

Event Website
Event Description
Event Vision

Event Budget and Expenses

Site Rental Budget	Site Rental Expenses	\$0.00
Catering Budget	Catering Expenses	\$0.00
Transportation Budget	Transportation Expenses	\$0.00
Decor Budget	Decor Expenses	\$0.00
Printing Budget	Printing Expenses	\$0.00
Activities & Entertainment Budget	Activities & Entertainment Expenses	\$5,000.00
Other Budget	Other Expenses	\$0.00
Contingency Budget		
Total Budget (Expected Gross Cost)	Total Expenses (Actual Gross Cost)	\$5,000.00
Total Expected MDF	Total Actual MDF	\$0.00
Net Expected Cost	Net Actual Cost	\$5,000.00

Tracks

New Track

No records to display

Event Registrations

New Event Registration

Event

Action	Registration Number	Name on Badge	Title on Badge	Primary Track of Interest
Edit Del	REG-000000	Myron Basta		

Event Expenses

New Event Expense

Ev

Action	Event Expense ID	Transaction Date	Expense Type	Expense Amount	Vendor Name
Edit Del	EXP-00000	8/21/2014	Activities & Entertainment	\$5,000.00	

Event Market Development Funds

New Event MDF

Event Market Develo

No records to display

Notes & Attachments

New Note

Attach File

Notes 8

No records to display

Opportunities

New Opportunity

Action	Opportunity Name	Account Name	Close Date
Edit Del	Cetera - Test - Myron	Cetera	12/31/2014

b. Sessions

Session

Hybrid Data Center

Customize Page | Edit L

Show Feed

Back to List: Events

Speakers [1]

Open Activities [0]

Activity History [0]

Notes & Attachments [0]

Session Detail

Edit

Delete

Clone

Session Name	Hybrid Data Center	Session Status	Abstract - Submitted
Track	Business	Level	Beginner
Room	Classroom A	Session Format	Presentation with customer(s)
Link to Event	Hybrid Data Center	Session Date	9/24/2014
Room Setup	Rounds	Session Time	9:00 AM
		Audio/Visual Requirements	

Session Description

Session Abstract

Session Notes

Slides URL

Audio URL

Session Details

Session Code	All Speakers Identified?	Yes
Session Rating	Publish to Web?	
# of Survey Responses	Session Slot Number	
Attendance	A/V Form	
Sponsored?	Session Theme	
Sponsor		
Created By	Aaron Janssen	8/25/2014 6:07 PM
	Last Modified By	Aaron Janssen
		8/25/2014 9:03 PM

EditDeleteClone

Speakers

New Speaker

Action	Speaker Id	Speaker Contact	Speaker Status
Edit Del	Speaker-0001	Leslie Neilsen	Ready to Publish

c. Speakers

Speaker-0001

[Customize Page](#) | [Edit](#)[Show Feed](#)[Back to List: Events](#)[Open Activities](#) | [Activity History](#) | [Notes & Attachments](#)

Speaker Detail

[Save](#) [Cancel](#)

Speaker Id	Speaker-0001	Speaker Status	Ready to Publish
Speaker Contact	Leslie Neilson	Account	Test-Customer
Speaker Type		Internal Handler	
Session	Hybrid Data Center	Publish to Web?	<input type="checkbox"/>
Track	Business	Speaker Rating	
Link to Event	Hybrid Data Center		

▼ Speaker Details

Topic Expertise
Best Practice Story (Brief Description)
Speaker Details
Biography
Speaker Image

▼ General Information

Speak Hierarchy	Hero Slide		
Gift	Release Form		
Partner			
Created By	Aaron Janssen, 8/25/2014 6:07 PM	Last Modified By	Aaron Janssen, 8/25/2014 6:07 PM

[Save](#) [Cancel](#)

d. [Venues](#)

Venue Test Convention Center

[Customize Page](#) | [Edit](#)[Show Feed](#)[Back to List: Events](#)[Rooms](#) | [Open Activities](#) | [Activity History](#) | [Notes & Attachments](#)

Venue Detail

[Edit](#) [Delete](#) [Clone](#)

Venue Name	Test Convention Center	Street Address #1	500 E Cesar Chavez St
Venue Type		Street Address #2	
Owner	Aaron Janssen [Change]	City	Austin
		State	Texas
		Postal Code/Zip	78701
		Country	United States
Venue Capacity		Map to Venue	Google Map
Location Information			

▼ Contact Information

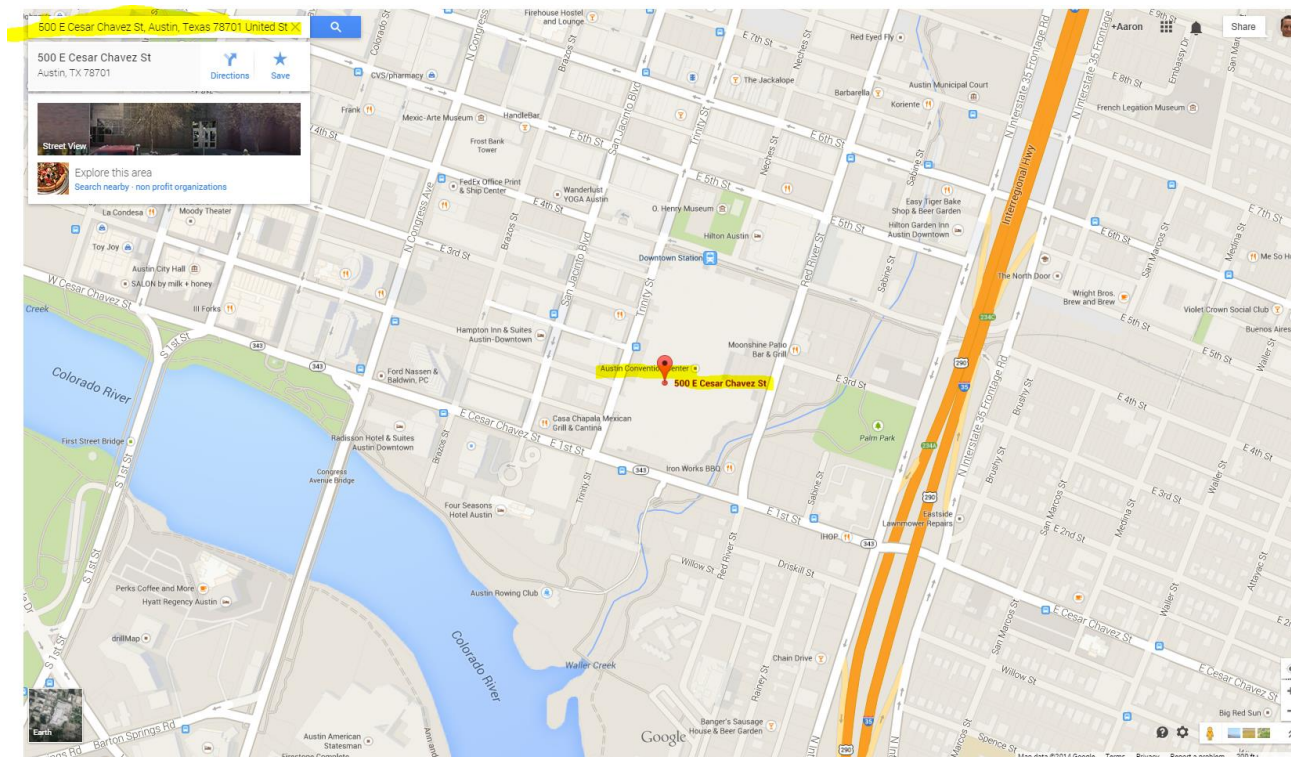
Primary Contact Phone	Contact #2		
Primary Contact	Contact #3		
Primary Contact Email			
Primary Contact Title			
Notes			
Created By	Aaron Janssen , 8/25/2014 6:07 PM	Last Modified By	Aaron Janssen , 8/25/2014 6:07 PM

[Edit](#) [Delete](#) [Clone](#)

Rooms

[New Room](#)

Action	Room Name
Edit Del	Main Hall
Edit Del	Classroom A
Edit Del	Classroom B



e. [Event Expenses](#)

Event Expense
EXP-00000
[Back to List: Events](#)

Event Expense Detail

Edit Delete Clone

Event	Shooting Range	Business Purpose	Customer event
Event Expense ID	EXP-00000	Vendor Name	
Expense Amount	\$5,000.00	City/State	
Expense Type	Activities & Entertainment	Comment	
Transaction Date	8/21/2014		
Created By	Aaron Janssen, 8/26/2014 1:46 AM	Last Modified By	Aaron Janssen, 8/26/2014 1:55 AM

Edit Delete Clone

f. [Event MDF](#)

Event MDF
MDF-00000
[Back to List: Events](#)

Event MDF Detail

Edit Delete Clone Submit for Approval


Event MDF ID	MDF-00000
MDF Partner Account	FireMon
Event	Hybrid Data Center
MDF Amount	\$5,000.00
MDF Partner Contact	
Agreement Details	
Received Payment	<input type="checkbox"/>
Created By	Aaron Janssen, 8/25/2014 9:04 PM

Edit Delete Clone Submit for Approval

Last Modified By Aaron Janssen, 8/25/2014 9:04 PM

8. Co-Op - Marketing Funds (Dev)

a. Budgets

 Budget
2014 Marketing Budget

[Back to List: Events](#)

[Budget Entries \(2\)](#) | [Fund Requests \(0\)](#) | [Fund Claims \(0\)](#) | [Budget History \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#)

Budget Detail [Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Owner: [Aaron Janssen \[Change\]](#) Active: ☒

Budget Name: 2014 Marketing Budget Start Date: 1/1/2014

Last Refresh Date: 8/26/2014 1:32 AM End Date: 12/31/2014

Account: [SOS Security](#) Record Type: [MDF \[Change\]](#)

Financial Details

Total Active Budget: [\\$120,000.00](#) Approved Claims: [\\$0.00](#)

Approved Requests: [\\$0.00](#) Unclaimed Requests: [\\$0.00](#)

Available Budget: [\\$120,000.00](#)

System Information

Created By: [Aaron Janssen](#) 8/26/2014 1:33 AM Last Modified By: [Aaron Janssen](#) 9/5/2014 12:10 PM

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Budget Entries [New Budget Entry](#) [Budget Entries Help ?](#)

Action	Number	Type	Record Type	Created Date	Expiration Date	Status	Description	Total
Edit Del	BE-000003	Addition	Standard	9/5/2014	12/31/2014	Active	VIP Travel	\$20,000.00
Edit Del	BE-000001	Addition	Standard	8/26/2014	12/31/2014	Active	FY 2014 Marketing Budget	\$100,000.00

Fund Requests [New Fund Request](#) [Fund Requests Help ?](#)

No records to display


Fund Claims [New Fund Claim](#) [Fund Claims Help ?](#)

No records to display

Budget History [Budget History Help ?](#)

Date	User	Action
8/26/2014 1:33 AM	Aaron Janssen	Created.

b. Fund Request Policy Enforcement (must be within 2 weeks & between \$500 – \$20K)

 Fund Request Edit
New Fund Request

[Help for this Page ?](#)

Fund Request Edit [Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.
Review all error messages below to correct your data.

Information [Required Information](#)

Owner: Aaron Janssen Status: Submitted

Request Name: [Airfare for VIP Myron Basta](#) Amount: [450.00](#)
Error: The amount requested must be between \$500 and \$20,000.

Account: [Cetera](#) Approved Date: 9/19/2014 [9/18/2014]

Budget: [2014 Marketing Budget](#) Partner Owner: [User](#) Aaron Janssen

Approved: ☐ Claim Deadline Date: 9/30/2014 [9/18/2014]

Request Details

Activity Date: 9/18/2014 [9/18/2014]
Error: The activity date should be two weeks or more in the future.

Activity Type: [Other](#) Other Activity Type: [Other](#)
Error: Please provide details on the "Other" activity type.

Request Details: [Request Details](#)

c. Fund Requests

« Back to List: Events

[Approval History](#) | [Fund Claims](#) | [Fund Request History](#) | [Notes & Attachments](#) | [Open Activities](#) | [Activity History](#)

Fund Request Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Assign Budget](#)

Owner	Aaron Janssen [Change]	Status	Draft
Request ID	140919-0002	Amount	\$600.00
Request Name	Airfare for VIP Myron Basta	Approved Date	9/19/2014
Account	Cetera	Partner Owner	Aaron Janssen
Budget	2014 Marketing Budget	Claim Deadline Date	9/30/2014
Approved	<input type="checkbox"/>	Age (Days)	0

Request Details

Activity Date	10/16/2014	Other Activity Type	Airfare
Activity Type	Other		
Request Details			
Desired Outcome			
Target Audience			

System Information

Created By [Aaron Janssen](#) 9/18/2014 9:06 PM

Last Modified By [Aaron Janssen](#) 9/18/2014 9:06 PM

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Assign Budget](#)

Approval History

[Submit for Approval](#)

No records to display

Fund Claims

[New Fund Claim](#)

No records to display

Fund Request History

Date	User	Action
9/18/2014 9:06 PM	Aaron Janssen	Created.

Notes & Attachments

[New Note](#) [Attach File](#)

d. Fund Claims

« Back to List: Events

[Approval History](#) | [Fund Claim History](#) | [Notes & Attachments](#) | [Open Activities](#) | [Activity History](#)

Fund Claim Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

Claim ID	140919-1	Status	Approved
Account	FireMon	Amount	\$400.00
Fund Request	Airfare for VIP Myron Basta	Approved Date	9/10/2014
Claim Name	Travel for Cetera VIP	Age (Days)	0
Budget	Travel for VIPs	Partner Owner	Jen Winters
Approved	<input type="checkbox"/>		
Claim Details	Travel to Vegas for Cyber Ark Event	Other Expenditure Type	VIP Exception based on \$100,000 open opportunity.
Expenditure Type	Other		

Payment & Verification Details

[Payment Method](#) [Credit Memo](#)

[Claim Paid Date](#)

Performance Attached ☐

Paid Check Number

Performance Verified ☐

System Information

Created By [Aaron Janssen](#) 9/18/2014 11:02 PM

Last Modified By [Aaron Janssen](#) 9/18/2014 11:03 PM

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#)

Approval History

[Submit for Approval](#)

No records to display

Fund Claim History

Date	User	Action
9/18/2014 11:02 PM	Aaron Janssen	Created.

e. [Budget Dashboard](#)



Budget

Find a dashboard...



Edit

Clone

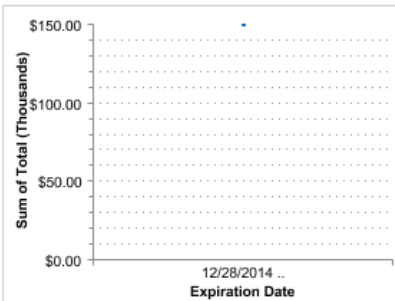
Refresh

As of Today at 12:58 AM

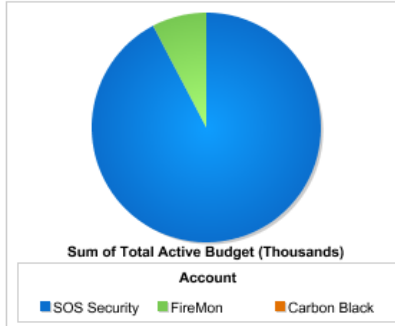
Key Budget Statistics

# Active Budgets:	4
Total Active Budget:	\$150K
Total Approved Requests:	\$0
Total Available Budget:	\$150K
Approved Claims:	\$0
Unclaimed Requests:	\$0
Funds Expiring In 90 Days:	\$0

Funds Expiring Trend



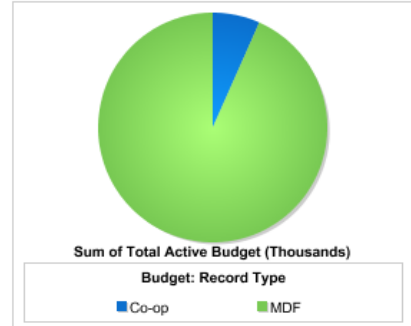
Budget Allocation



Non Partner Specific Budgets

Budget: Budget Name	Sum of Total Active Budget
Travel for VIPs	\$20K

MDF v. Accrual Budget Breakout



Total Budgets By Partner

Account	Sum of Total Active Budget
Carbon Black	\$0
FireMon	\$10K
SOS Security	\$120K

f. [Funds Requests and Claims Dashboard](#)

Fund Requests & Claims

Find a dashboard... ▼ Edit Clone Refresh As of Today at 1:02 AM

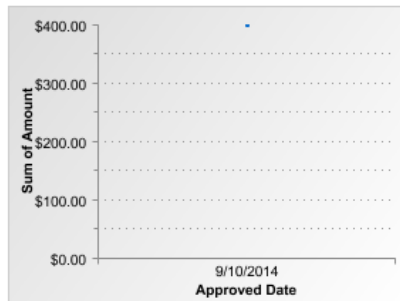
Pending Approval Statistics

# Fund Requests:	0
Fund Requests Value:	\$0
# Claims:	0
Claims Value:	\$0
# Pending Requests Over \$10k:	0
# Pending Requests Over \$2k:	0

Approved Requests By Budget

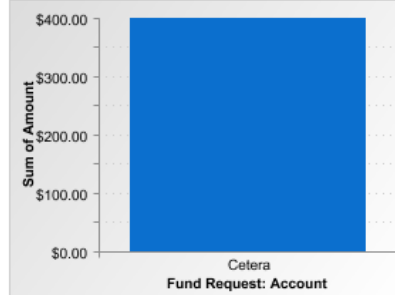
Budget: Budget Name	Sum of Amount
---------------------	---------------

Funds Claim Trend

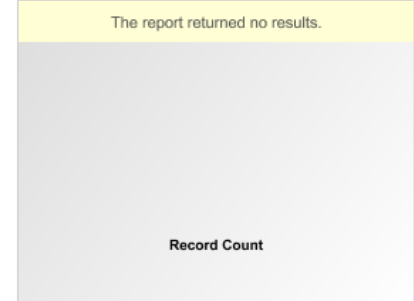


Last 120 Days

Top Fund Recipients (\$)



Approved Spend By Marketing Activity



Top Request Submitters

Account: Account Name	Record Count
Cetera	2

All time

Fund Request Status

Status	Record Count
Draft	2

Key Fund Statistics

Total Requested:	\$1K
Total Claims Paid:	\$400
Total Approved Value:	0
Average Request Amount:	\$550
Average Claim Amount:	\$400
Highest Fund Request \$:	\$600

9. SOS Marketing Event ROI (SOS, Dev)

a. [SOS Events Dashboard](#)



SOS Events

Find a dashboard...



Edit

Clone

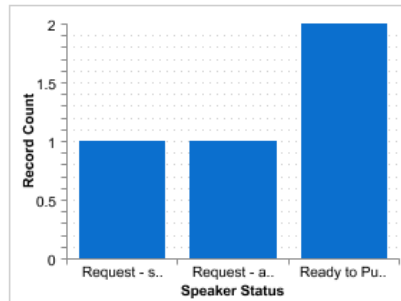
Refresh

As of Today at 12:40 AM

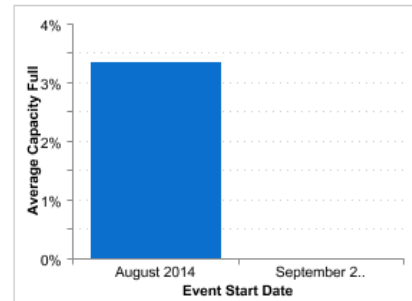
SOS Events (ROI by Event)



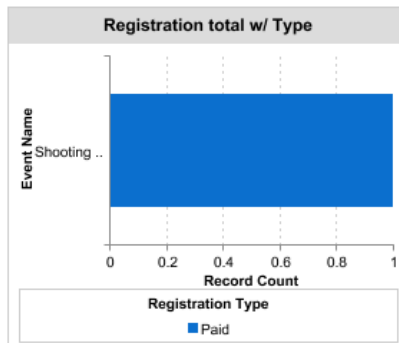
SOS Events (ROI by Account)



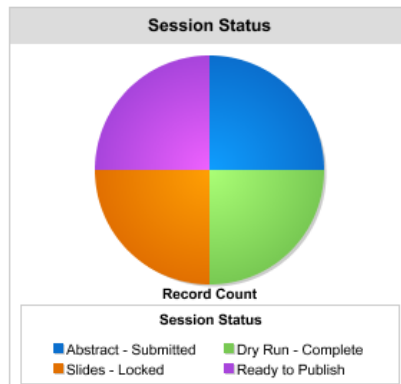
SOS Events (ROI by Contact)



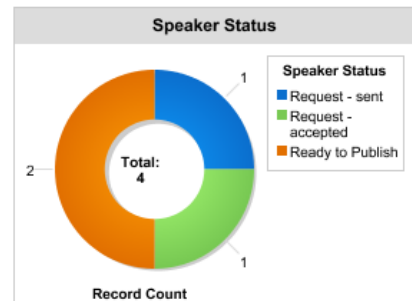
SOS Events (Leads by Event)



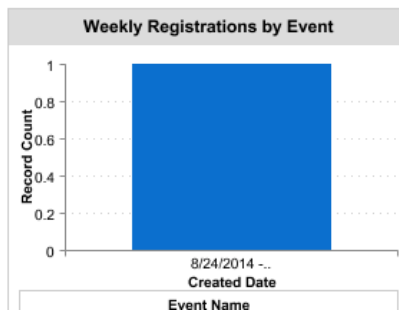
SOS Events (Opportunities by Event)



SOS Events (Opportunities by Event)



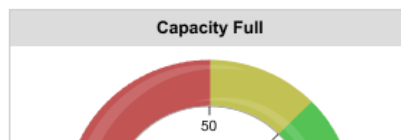
SOS Events



SOS Events

Upcoming Events w/ Session Count	
Event Name	Record Count
Hybrid Data Center	4

SOS Events



SOS Events

Sessions without Speakers	
Session Name	Record Count
Hybrid Data Center	1
Intro to Programming	1
Opening Keynote (Biz)	1
Opening Keynote (Tech)	1

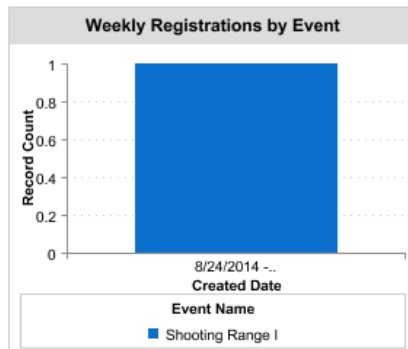
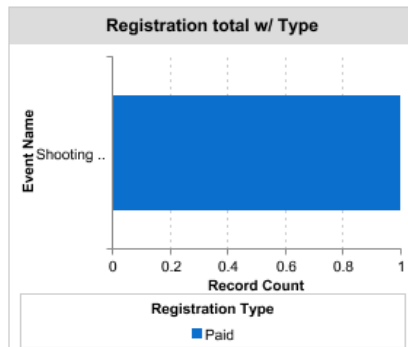
10. Event Reports / Dashboards (Dev)

a. [Events Summary Dashboard](#)

Events Summary Dashboard

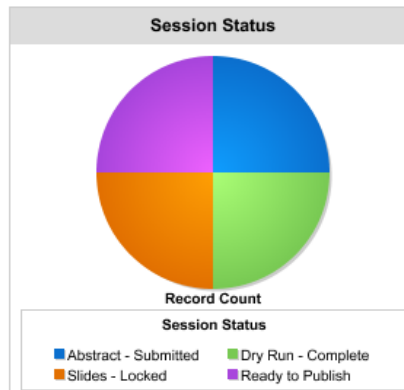
Find a dashboard... ▼ Edit Clone Refresh As of September 11, 2014 at 4:49 PM

Registrations



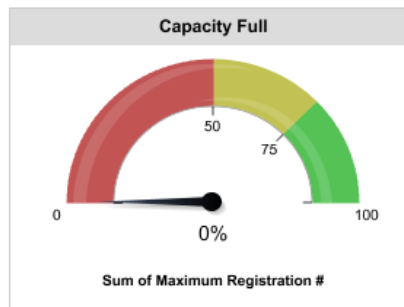
Event Start Date	Event: Event Name	Average Capacity Full
August 2014	Shooting Range I	3
September 2014	Hybrid Data Center	0

Sessions

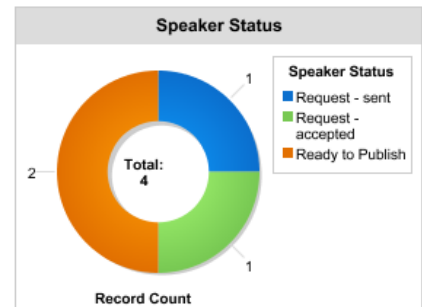


Upcoming Events w/ Session Count

Event Name	Record Count
Hybrid Data Center	4



Speakers



Sessions without Speakers

Session Name	Record Count
Hybrid Data Center	1
Intro to Programming	1
Opening Keynote (Biz)	1
Opening Keynote (Tech)	1

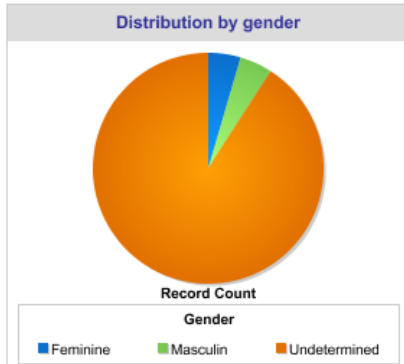
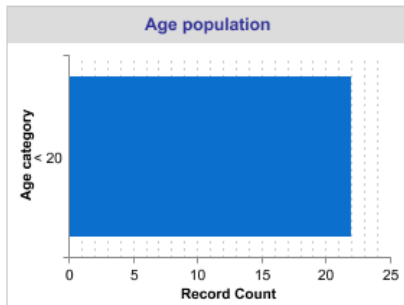
b. [Lead Target Dashboard](#)

Lead target dashboard

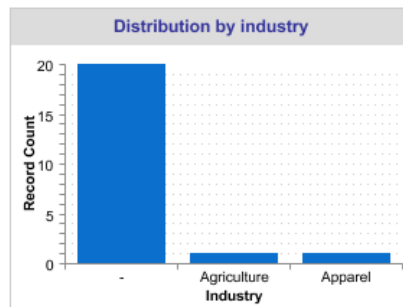
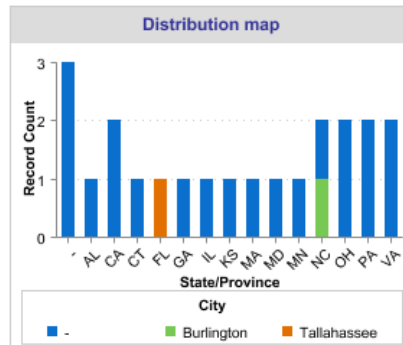
Find a dashboard... As of August 21, 2014 at 1:33 AM

This dashboard allows you to quickly analyse your lead database and to define campaign targets within just a few clicks!

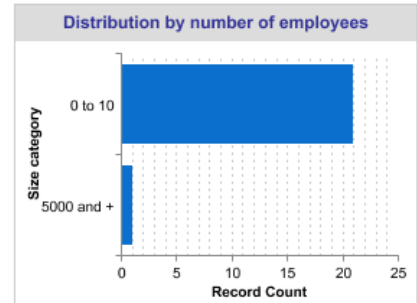
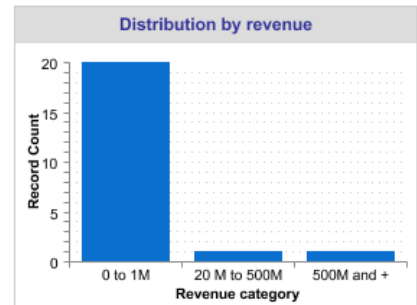
Age and gender



Geography and industry



Company size



c. [Contact Target Dashboard](#)

Contact target dashboard

Edit

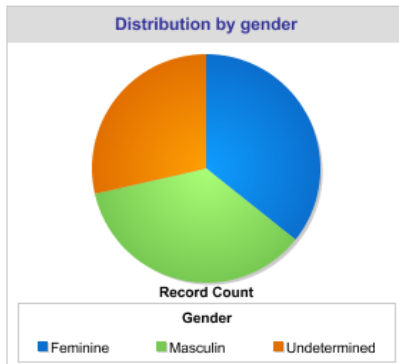
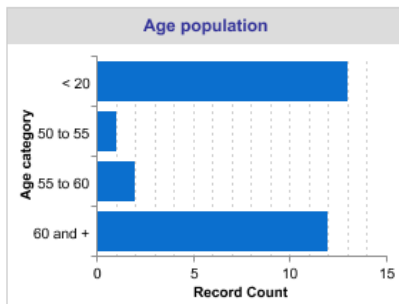
Clone

Refresh

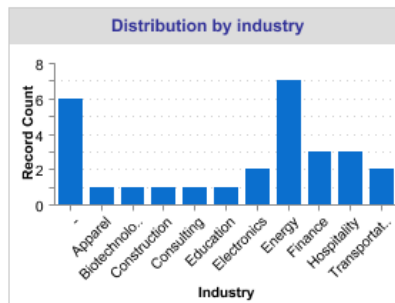
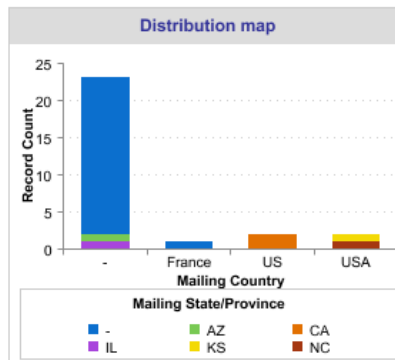
As of September 2, 2014 at 10:45 AM

This dashboard allows you to quickly analyse your contact database and to define campaign targets within just a few clicks!

Age and gender



Geography and industry



Company size

