



My Pipeline & Campaign-in-a-Box

Eleonora Lyapina Channel Marketing & Operations Team Lead 01/09/2017



Agenda

- I. Campaign-in-a-Box: concept & flow
- II. Campaign-in-a-Box: conflict cases
- III. Demo
- v. My Pipeline: concept & flow
- v. Demo



Campaign-in-a-Box (CiB): concept & flow

CiB on the Portal Partner requests a CiB

Partner launches a CiB

Partner receives leads

Partner qualifies leads

Channel Opportunity

- Growing portfolio
- ✓ 4 targeted audience
- ✔ All-in-one packages
- ✓ Request \rightarrow MRKT
- ✓ 1 business day SLA
- ✓ Easy set up
- ✓ Easy tracking

- ✓ Automated lead forwarding
- ✓ Leads → Partner
 Portal in 10 sec.
- ✓ Lead views for CAM

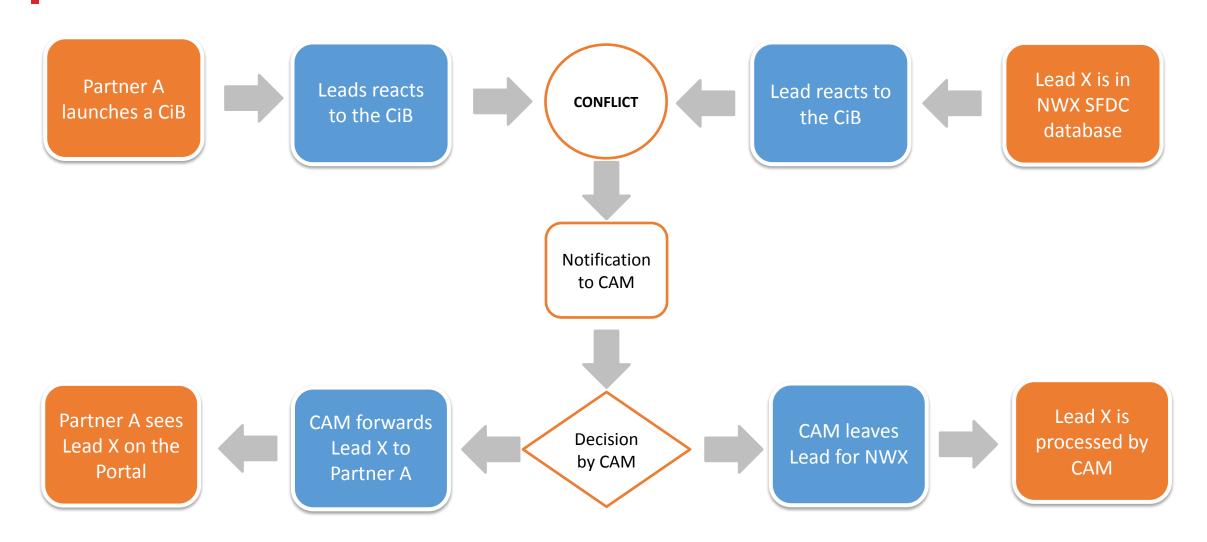
- ✓ Lead request
- ✔ Forwarded date
- ✓ Comments to CAM
- ✓ Lead sorting out
- ✓ Lead filtering
- ✓ New are highlighted

- ✓ Lead status update
- ✓ CSV export
- ✓ Deal registration
- ✓ Demo request
- ✓ Quote request
- ✓ Disqualification

- ✓ Enhanced tracking
- ✓ Enhanced reporting
- ✓ CSV export

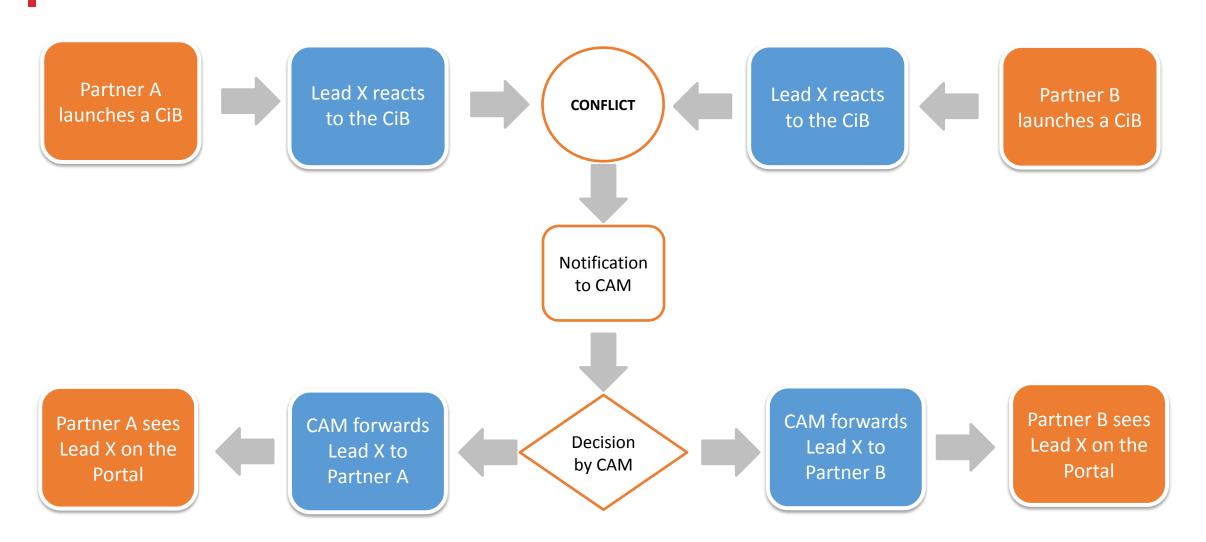


Conflict case #1: NWX lead reacts to CiB



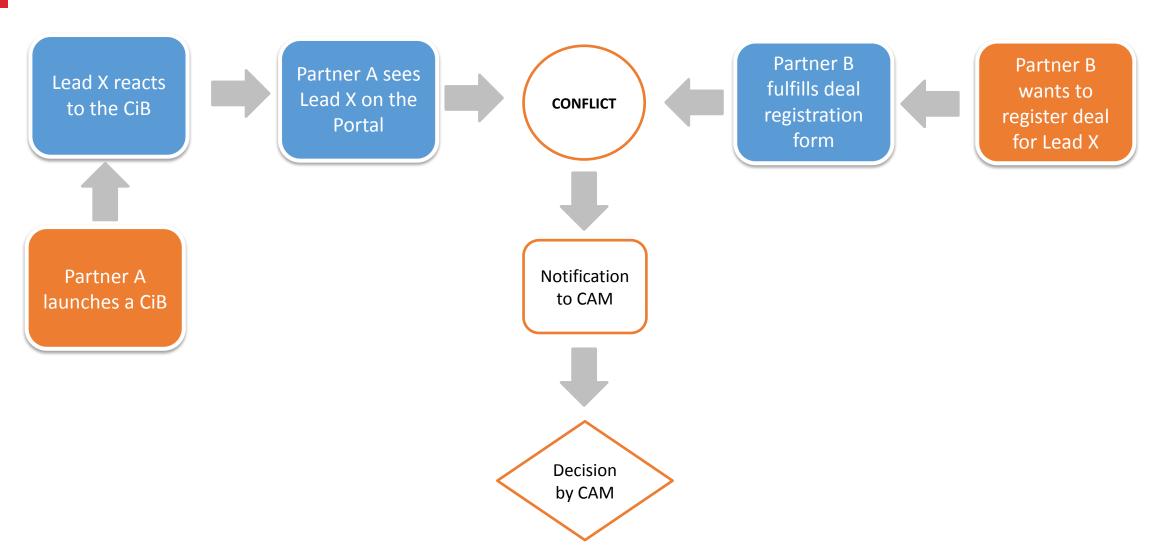


Conflict case #2: Lead reacts to several CiBs



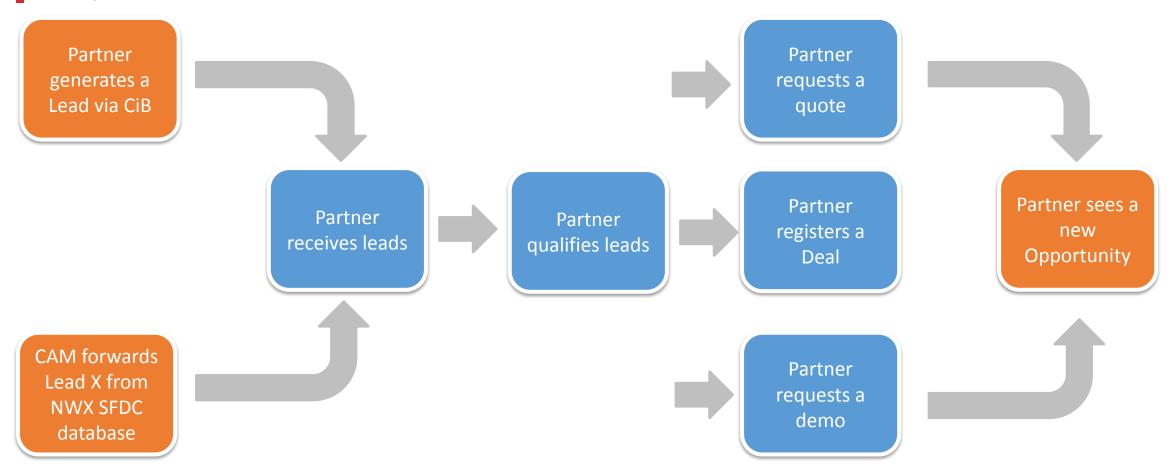


Conflict case #3: Deal Registration for Partner Lead





My Pipeline: concept & flow







Thank You!

Eleonora Lyapina Channel Marketing & Operations Team Lead 01/092018



Conflict case #1: NWX lead reacts to CiB

Partner A launches a CiB Leads reacts to the CiB

CONFLICT

Notification to CAM

Decision by CAM

Lead reacts to the CiB

Lead X is in NWX SFDC database

Partner A sees Lead X on the Portal CAM forwards Lead X to Partner A

CAM leaves Lead for NWX Lead X is processed by CAM



Conflict case #2: Lead reacts to several CiBs

Partner A launches a CiB Leads X reacts to the CiB

CONFLICT

Notification to CAM

Decision by CAM

Lead X reacts to the CiB

Partner B launches a CiB

Partner A sees Lead X on the Portal CAM forwards Lead X to Partner A CAM forwards Lead X to Partner B

Partner B sees Lead X on the Portal



Conflict case #2: Lead reacts to several CiBs

Partner A launches a CiB Leads X reacts to the CiB

CONFLICT

Notification to CAM

Decision by CAM

Lead X reacts to the CiB

Partner B launches a CiB

Partner A sees Lead X on the Portal CAM forwards Lead X to Partner A CAM forwards Lead X to Partner B

Partner B sees Lead X on the Portal



Conflict case #3: Deal Registration for Partner Lead

Lead X reacts to the CiB Partner A sees Lead X on the Portal

Partner A launches a CiB

CONFLICT Notification to Partner B Notification to CAM Decision by CAM

Partner B fulfills deal registration form

Partner B wants to register deal for Lead X