



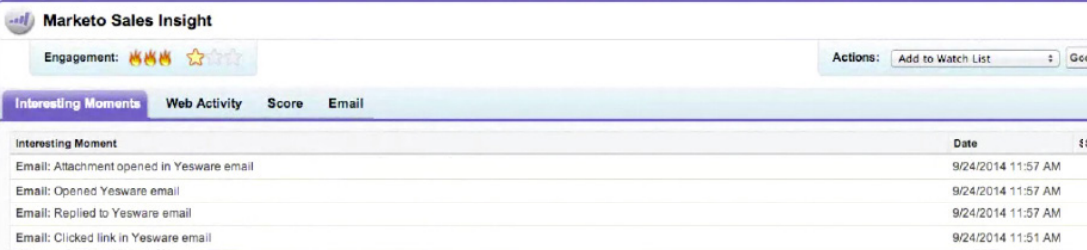
Welcome to Yesware Analytics in Marketo. This document outlines selected reports and dashboards that have helped previous customers gain the most out of their Yesware + Marketo integration.

Yesware Analytics provide context into the quantity of emails sent, emails replied, and first meetings booked as it relates to the sources of your Marketing Qualified Leads. We offer visibility into the sales activity attached to a given lead as it converts through the sales cycle.



# INTERESTING MOMENTS

## Yesware Emails: Opens, Clicks, Attachments, Replies

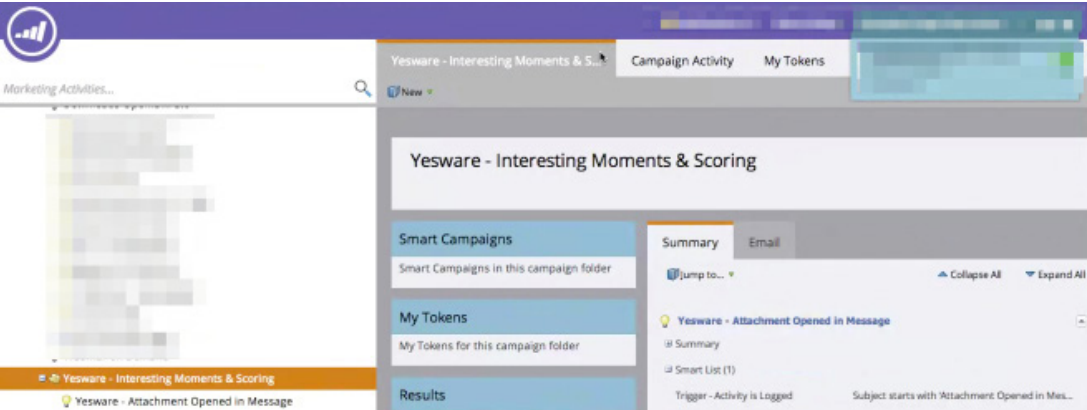


The screenshot shows the 'Market Sales Insight' interface with an 'Engagement' section containing three fire icons and five star icons. Below this is a table with tabs for 'Interesting Moments', 'Web Activity', 'Score', and 'Email'. The 'Interesting Moments' tab is active, displaying a table of activities.

Interesting Moment	Date
Email: Attachment opened in Yesware email	9/24/2014 11:57 AM
Email: Opened Yesware email	9/24/2014 11:57 AM
Email: Replied to Yesware email	9/24/2014 11:57 AM
Email: Clicked link in Yesware email	9/24/2014 11:51 AM

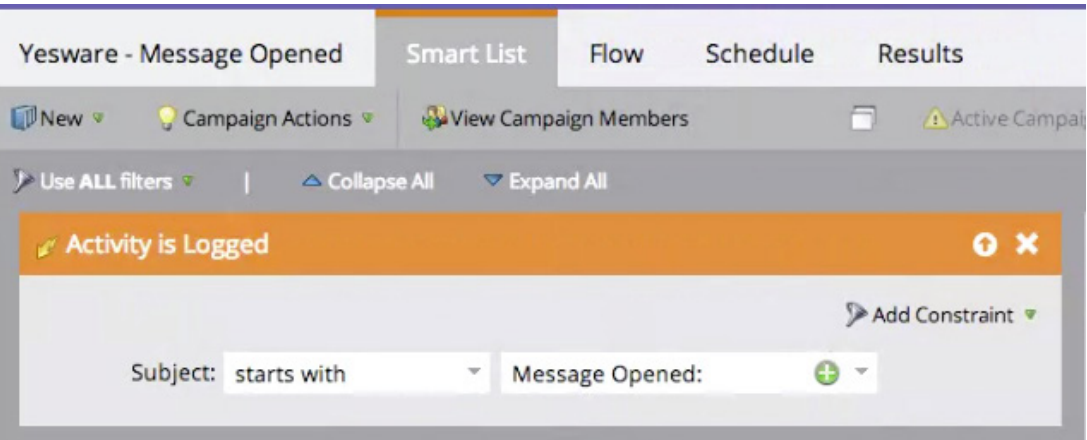
## Create a central location for Marketing to track Sales Team activity

(i.e. email opens, link clicks, attachment opens and replies)



The screenshot shows a dashboard titled 'Marketing Activities...' with a search bar and a 'New' button. The main content area is titled 'Yesware - Interesting Moments & Scoring' and contains several sections: 'Smart Campaigns', 'My Tokens', and 'Results'. A 'Summary' tab is active, showing a list of activities including 'Yesware - Attachment Opened in Message'.

## Create a Salesforce Trigger on 'Activity is Logged'



The screenshot shows the configuration for a Salesforce trigger named 'Yesware - Message Opened'. The trigger is set to fire on the 'Smart List' object. The trigger condition is 'Activity is Logged'. The trigger filter is 'Subject: starts with Message Opened:'. The trigger is currently disabled, as indicated by the orange bar at the top of the configuration area.



## SCORING

Through Marketo, marketers have the ability to additionally score leads based on Prospect AND Sales Team activities.

### Create Flows around Yesware Email Tracking to change Lead Scores

Example: If: "Email" starts with "Message Opened", Score Name: "Lead Score" Change: "+3"

The screenshot shows the Marketo Flow Builder interface. At the top, there are tabs for 'Yesware - Message Opened', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs, there are icons for 'New', 'Campaign Actions', 'View Campaign Members', and 'Active Camp'. The main area contains two steps:

- 1 - Interesting Moment**: This step has a 'Type' dropdown set to 'Email' and a 'Description' text box containing 'Opened Yesware email'. There is an 'Add Choice' button to the right.
- 2 - Change Score**: This step has a 'Score Name' dropdown set to 'Lead Score' and a 'Change' dropdown set to '+3'. There is an 'Add Choice' button to the right.

### Insight into which Contacts/Leads are engaging with the Sales Team

The screenshot shows the 'Smart Campaign Settings' dialog box. At the top, it displays 'Campaign Status: Active' and 'Smart List Mode: Triggered'. Below this, there is a blue header bar with the text 'Smart Campaign Settings' and an orange 'EDIT' button. The main content area contains the following text:

- If lead has been in this Smart Campaign before**
- Each lead can run through the flow every time
- If lead has reached the communication limits**
- Ignore limit

