



CONTACT ROLES

| CONTACT NAME | ROLE |
|----------------|---|
| ● DOREEN GREEN | INFLUENCER |
| ● TIM DRAKE | BUSINESS USER |
| ● MATT MURDOCK | ECONOMIC BUYER |
| ● EVE WILKINS | EVALUATOR DECISION MAKER OTHER |

BUSINESS CASE FOR Opportunity Contact Roles

BEST PRACTICES GUIDE

Definition of Opportunity Contact Role

Opportunity Contact Roles (OCR) let you specify the part that a person plays in an account, case, contract, or opportunity. When you use contact roles, you have more information about who to contact and when.

Benefits for Sales

Opportunity contact roles allow your sales team to better understand account relationships and key players.

Other benefits include:

Training Newbies

When new reps come join the company or existing reps change territories, it's easy to identify who participants have been in past sales opportunities.

Confirmation

If a company requires a technical contact, decision maker, or billing contact to be involved in all opportunities by assigning the required contact roles, the opportunity owner will show that they have done their due diligence and it will be visible to management that the opportunity is indeed qualified per company protocol.

Note: Contact Roles can be customized to reflect the names of the roles a company needs to align with, in regards to whom they normally deal with at companies.

Visibility

By looking at the Opportunities Related list on the Contact record, anyone who is looking at the contact can see all opportunities that person is currently involved with. No additional data will need to be entered into Salesforce.

Ease of Use

It makes it easier for reps to manage pipeline and opportunities when they know who the players are in the opportunity.

Consistency

Having sales reps associate contacts with opportunities by using Opportunity Contact Roles, ensures users create contact records for people, who may not have ever ended up in Salesforce.

Information

Helps keep relevant sales activities within the sales process at top of mind by allowing anyone coming into the prospective sale to be instantly oriented with the people involved with the opportunity.

Perspective

Allows management to see what role a contact plays in an opportunity, regardless of what title the record has in Salesforce.

Communication Preferences (Sales/Marketing):

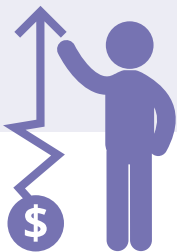
By using Opportunity Contact Roles, sales reps can tell marketing to refrain from communicating with individuals they are currently involved with in a potential sale to ensure that they are not over-communicating.

Ease of Use

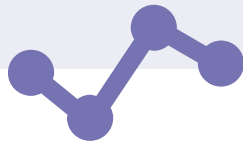
If your company ever wants to use an eSignature solution (like DocuSign) you will most likely need to implement contact roles in order to make sure the signer gets the contract/invoice.

Benefits for Sales

Here's how using opportunity contact roles helps build stronger business cases for marketing channel investment.



If reps feel that a particular event or lead source is consistently producing new business, the best way to demonstrate that to marketing is converting leads to contacts and adding them as contact roles to opportunities.



That information automatically feeds into Marketo ROI reporting.



Quantitative data can be used to help to justify continued or increased marketing spend in a particular channel, not just anecdotal information.



Opportunity Contact Roles allow for the use of Campaign Influence. Campaign Influence allows a company to see exactly which contacts are influenced through marketing efforts, and what affects their efforts have on sales.

Without using Contact Roles, companies **aren't able to see ROI** on their investment in their marketing efforts.



Benefits for Marketing

Using opportunity contact roles don't just benefit sales.

Marketing teams can also use them to:

Demonstrate the ROI of marketing campaigns—not just net new names generated, but actual revenue and new business

- + You can only establish metrics related to ROI when contacts are associated with opportunities. This can happen by creating an opportunity at the time of lead conversion, or adding a contact role to an existing opportunity.
- + If the connection between contact and opportunity is not in place, the deepest metric we can definitively show is cost per lead, or net new names generated.

Establish the influence of marketing campaigns across all lead sources

When contact roles are used, marketing can establish the influence of the campaigns they have run on all new business, not just new business resulting from marketing-generated leads. This is called *multi-touch attribution*.

Ensure accuracy in marketing campaign targeting

- + Marketing may want to suspend campaigns or lead nurturing for leads or contacts that are actively involved in an opportunity, because they are already communicating directly with a rep.
- + The only way that Marketo can accurately see that a contact is involved in an opportunity is when contact roles are in place.
- + **Communication Preferences (Sales/Marketing):** By using Opportunity Contact Roles, sales reps can tell marketing to refrain from communicating with individuals they are currently involved with in a potential sale to ensure that they are not over-communicating.

Gain greater understanding of high-level conversion metrics

Marketo Revenue Cycle Explorer reports can help to gain a data-driven understanding of how many leads need to enter the funnel to generate enough opportunities to meet revenue targets. These reports only function when contact roles are used to tie campaign “success” to opportunity revenue.

WHO IS LeadMD ?

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Our pack of Marketo Certified Experts is chock full of Salesforce ninjas, Marketo gurus, design superstars, social and content specialists, web developers and more. We are proud to be Marketo's first Strategic Services Partner. With over 2,800 Marketo instances serviced, LeadMD is well-equipped to help you reach this year's marketing goals and beyond.

Continue the Learning

In addition to the services we offer, LeadMD invites you to learn Marketo, CRM and marketing best practices with our on-demand learning series, leadmd.com/marketplace.

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