

LeanData Engagement

Reports and Dashboards



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Overview

The following guide contains a breakdown of all the Reports and Dashboards included with the Engagement product. The Reports and Dashboards are part of the “LeanData Analytics” package that will need to be installed separately from the “Engagement” package. Please view the [Engagement Install Instructions](#) for further details.

In this guide, the reports and dashboards will be broken down by the following characteristics:

- Report / Dashboard Name
- Report / Dashboard Description
- Questions answered by the Report / Dashboard

The reports and dashboards are compatible with Salesforce Classic, however we recommend viewing all reports and dashboards in Salesforce Lightning.

Standard Engagement Reports

Engagement reports are Salesforce reports created using the LeanData Engagement object. These reports give you an idea of the types of reports you can create to better understand the impact of your sales and marketing efforts on your Account Based Marketing or Account Based Selling strategy. We recommend customizing these reports and pulling in your custom fields from the following objects: Account, Lead, Contact, Campaign, Activity.

Please Note: LeanData Engagement Reports can be found in *LeanData Engagement Reports* (Installed Package: *LeanData Analytic Reports*) folder (under the *Reports* tab).

Campaign Engagement

Definition: Engagement by Campaign this Quarter:

- View the most engaging campaigns of the current quarter.
- Modify the filters to view a longer period of campaign engagement.

Purpose:

- Which campaigns are generating the most engagement?

Campaign Engagement & Sales Follow-Up

Definition: Engagement by Campaign and Sales Follow-up this Quarter:

- View the most engaging campaigns of the current quarter.
- Understand the outstanding Sales Follow-up for each campaign.
- Modify the filters to view a longer period of campaign engagement and sales follow-up.

Purpose:

- What is the most engaging content?
- How many campaign engagements still require sales follow-up?

Campaign Engagement by Account

Definition: The Number of Accounts engaged by campaigns this Quarter:

- View the campaigns that have engaged with the highest number of accounts.
- Modify the filters to view a longer period of campaign engagement.

Purpose:

- How many accounts have been engaged by my campaigns?
- What is our most engaging campaign?

Channel Engagement Over Time

Definition: Campaign Engagement by marketing channel this Quarter.

- View engagement volume by marketing channel on a week on week basis.
- Identify the channels that are driving the majority of engagement.

Purpose:

- What is my most engaging channel?
- What is the engagement trend across a particular channel (e.g., webinars)?

Engagements (Account)

Definition: Account specific engagement.

- View all engagements on a specific account.
- Note: This report is populated when the `View Report` button is selected on the Engagement AccountView (on the Salesforce Account page).

Purpose:

- What are all the Marketing and Sales engagements on a specific account?

Engagements (Campaign)

Definition: Campaign specific engagement.

- View all Marketing engagements on a specific campaign.
- Note: This report is populated when the `View Report` button is selected on the Engagement Campaign View (on the Salesforce Campaign page).

Purpose:

- What are all the Marketing engagements on a specific campaign?

Marketing Eng by Owner w/ Follow-Up

Definition: Marketing Engagements broken down by Account Owner (Rep) grouped by Sales Follow-up.

- View marketing engagements by Account Owner (Rep).
- Identify which reps have received marketing engagement but have not followed-up.

Purpose:

- Which Reps have received the most Marketing support?
- Which Reps haven't followed up with their prospects and contacts after Marketing Activation?

Marketing vs. Sales Engagement Over Time

Definition: Trend of Marketing and Sales Engagements this Quarter.

- View Marketing and Sales engagement from this quarter on a week by week basis.
- Establish a baseline of Marketing and Sales Engagements.

Purpose:

- Does seasonality impact the flow of my Marketing and Sales Engagements?
- Are there any trends in recent Engagement across Sales and Marketing?

Most Marketing Engaged Accts This Month

Definition: Most Marketing Engaged Accounts This Month.

- View accounts that have engaged the most with Marketing.

Purpose:

- Which accounts are engaging the most with our marketing efforts?

Most Marketing Engaged People on an Acct

Definition: Most Marketing Engaged Leads and Contacts on an Account This Quarter.

- View the most marketing engaged people on an account.

Purpose:

- Who are the most marketing engaged people on an account?
- What are their roles and titles?

Most Sales Engaged Accts This Month

Definition: Most Sales Engaged Accounts This Month.

- View accounts that have engaged the most with Sales.

Purpose:

- Which accounts have been proactively engaged by Sales?
- Which accounts should be targeted by Marketing?

People Requiring Sales Follow-up

Definition: Lead and Contacts that have been Marketing Engaged but require a Sales Engagement this Quarter.

- View all the leads and contacts that require a Sales Followup.

Purpose:

- Which prospects & customers require follow-up?
- Which prospects & customers on a particular account require follow-up?

Sales Activated Accts w/o Marketing Eng

Definition: Sales Activated Accounts this Quarter that have not received Marketing Engagement.

- View all accounts that have been activated by sales this quarter, but have no marketing engagements.

Purpose:

- Which accounts have been activated by sales but not by marketing?
- Which accounts should be targeted by Marketing?

Standard Engagement Dashboards

Our Engagement dashboards are different types of Engagement. Each serves a different theme to help you measure your Go To Market Analytics. We recommend viewing these reports in Lightning.

Engagement Dashboards:

- ABM Dashboard
- Account Engagement Deep Dive
- Campaign Dashboard
- Marketing & Sales Alignment Dashboard

LeanData Engagement Dashboards can be found in *LeanData Engagement Dashboards* (Installed Package: *LeanData Analytic Reports*) folder (under the *Dashboard* tab).

ABM Dashboard

Account Based Motion focused Dashboard. Customize this dashboard by adding your standard and custom fields such as Account Type, Target Account, etc.

Questions Answered:

- Are there any trends in recent Engagement across Sales and Marketing?
- Does seasonality impact the flow of my Marketing and Sales Engagements?
- What is my most engaging channel?
- What is the engagement trend across a particular channel (e.g., webinars)?
- Which accounts are engaging the most with our marketing efforts?
- What is the most engaging content?
- How many campaign engagements still require sales follow-up?
- Which accounts have been activated by sales but not by marketing?
- Which accounts should be targeted by Marketing?

Reports Included:

- Marketing vs. Sales Engagement Over Time
- Channel Engagement Over Time
- Most Marketing Engaged Accounts This Month
- Sales Activated Accounts Without Recent Marketing Engagement
- Campaign Engagement and Sales Follow-Up

Account Engagement Deep Dive

Engagement Dashboard focused on a selected account. There is a dashboard filter on this dashboard. Customize by selecting the account to filter on for a deeper dive into account engagement.

Questions Answered:

- Are there any trends in recent Engagement across Sales and Marketing on this account?
- Does seasonality impact the flow of my Marketing and Sales Engagements on this account?
- What is my most engaging channel on this account?
- What is the engagement trend across a particular channel (e.g., webinars) on this account?
- What content is most engaging?
- Who are the most marketing engaged people on this account?
- What are their roles and titles?

- Which prospects & customers on this account require follow-up?

Reports Included:

- Marketing vs. Sales Engagement Over Time
- Channel Engagement Over Time
- Most Marketing Engaged People on an Account
- People Requiring Sales Follow-Up

Campaign Dashboard

Campaign Engagement Dashboard. Customize the dashboard by adding your own filters such as Account Type, etc.

Questions Answered:

- Which campaigns are generating the most engagement?
- How many accounts have been engaged by my campaigns?
- What is our most account-engaging campaign?
- Does seasonality impact the flow of my Marketing and Sales Engagements?
- What is my most engaging channel?

Reports Included:

- Campaign Engagement
- Campaign Engagement by Account
- Channel Engagement Over Time

Marketing & Sales Alignment Dashboard

Align your Marketing & Sales teams by examining the effectiveness of your Account Based Marketing from Campaign Engagement to Sales Follow-Up. Customize the dashboard by adding your own filters such as Account Type, Segments, Regions, etc.

Questions Answered:

- Are there any trends in recent Engagement across Sales and Marketing?
- Does seasonality impact the flow of my Marketing and Sales Engagements?
- Which Reps have received the most Marketing support?
- Which Reps haven't followed up with their prospects and contacts after Marketing Activation?
- Which accounts have been proactively engaged by Sales?
- Which accounts should be targeted by Marketing?

Reports Included:

- Marketing vs. Sales Engagement Over Time
- Marketing Eng by Owner w/ Follow-Up
- Most Sales Engaged Accounts This Month