terminus

Engagement Model Setup Guide

Everything you need to know to set up an Engagement Model in Terminus

ENGAGEMENT SPIKE OVERVIEW

When you create a Spike Model in Terminus Engage, you will receive a report every week of all your target accounts that are spiking. Spiking accounts are target accounts that have shown increased engagement on your most valuable web pages compared to their past engagement.

> **Engagement Spike tells you which accounts are actively researching your solution. Use the Engagement Spike report to prioritize marketing and sales outreach to these accounts.**

Engagement Spike uses data from Account-Based Visitor ID, which identifies anonymous traffic to your website and aggregates it by company. Engagement Spike monitors the traffic from target accounts to specific web pages you have selected to create a model. When a target accounts shows an increase in traffic to those pages in a given week, compared to the four week rolling average, Engagement Spike then identifies that account as "spiking" using our proprietary engagement algorithm.

To begin receiving Engagement Spike reports, you must first select which web pages you would like to track. You also must have Visitor ID installed on the domain and subdomain of the pages you select.

SELECTING PAGES FOR AN ENGAGEMENT MODEL TO TRACK

You should select the web pages that someone would read if they were researching your solution. These pages should provide information about your solution, how it works, and the problem it solves.

You can designate a page as either **High Value** or **Brand Awareness**. The Engagement Model only tracks visits on these types of pages. In the Engagement Model algorithm, High Value pages are weighted more heavily than Brand Awareness pages. Any web page that is not tagged High Value or Brand Awareness will not be counted in the Engagement Model algorithm.

> ! *When choosing pages to track, ask yourself: is this a page I want the target personas from my ideal customer accounts to visit?*

Selecting High Value Pages

These are the most important pages that a prospect or customer would review when considering your products or solutions and actively researching them. Examples of High Value pages could be: product pages, solution pages, product resources pages, case studies, request a demo pages, pricing pages, free trial pages, and other critical content that a current or future customer might consume during research.

Selecting Brand Awareness Pages

Visits to Brand Awareness pages are weighted less heavily in the Engagement Model algorithm. You should select pages that provide information about your company and/or information on the problem you solve. Examples of Brand Awareness pages could be: blog posts, high-level product pages, content related to the challenge your solution addresses, company news, and about us.

GAINING BUY-IN FROM SALES

The Engagement Spike report is most valuable when you get it into the hands of your sales team. It will help them to set more meetings, create more pipeline, and close more deals. However, you will need to help them understand what Engagement Spike is, why it is important, and how to use it.

Because the Engagement Model uses anonymous web traffic in its algorithm, it doesn't require visitors to fill out a form or be a known contact in your database. This provides sales with two key benefits:

- Engagement Spike is an earlier signal of an account's interest than a form fill.
- Engagement Spike captures engagement from people at accounts that may never complete a form, which are typically higher level decision-makers.

The best way to gain buy-in from sales is to incorporate sales leaders in the web page selection process. Set up a meeting, explain what an Engagement Model is, and work together to choose which pages are High Value and Brand Awareness. Involving sales leaders ensures that they believe in the Engagement Spike report, that they understand how it works, and that it will be used by sales reps.

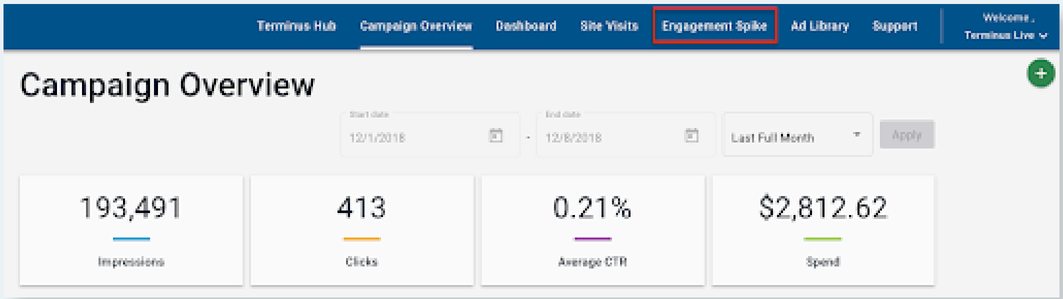
Every Monday, you should send the report to your sales teams so that sales can prioritize their outreach based on which accounts are spiking.

"From our first Engagement Spike report, we were able to set two meetings with targets accounts that my sales development reps had been working for weeks with no response. Turns out they were anonymously researching our product, and my team was able to strike at the exact right moment." **– Ryan Vitello, Sales Development Manager**

INSTRUCTIONS ON SETTING UP YOUR ENGAGEMENT SPIKE MODEL

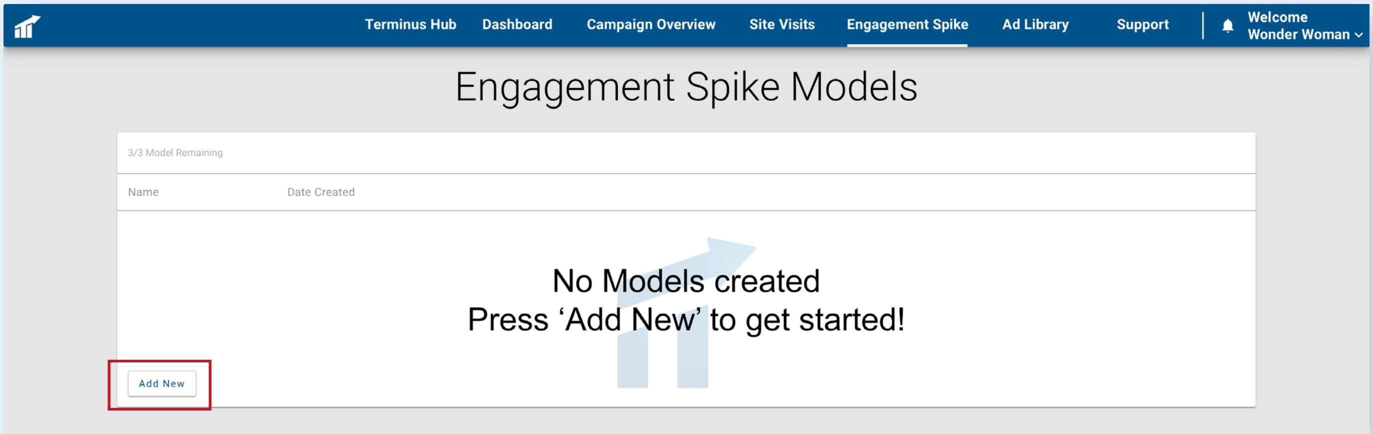
After you've determined which pages to track, you need to add them to your Engagement Spike model in Terminus. Here's how:

STEP 1: Click on the Engagement Spike tab from the Terminus dashboard



STEP 2: Click on the "Add New" button to create a new model

Please reach out to your Terminus CSM or Onboarding Specialist to confirm the number of Engagement Models you can create.

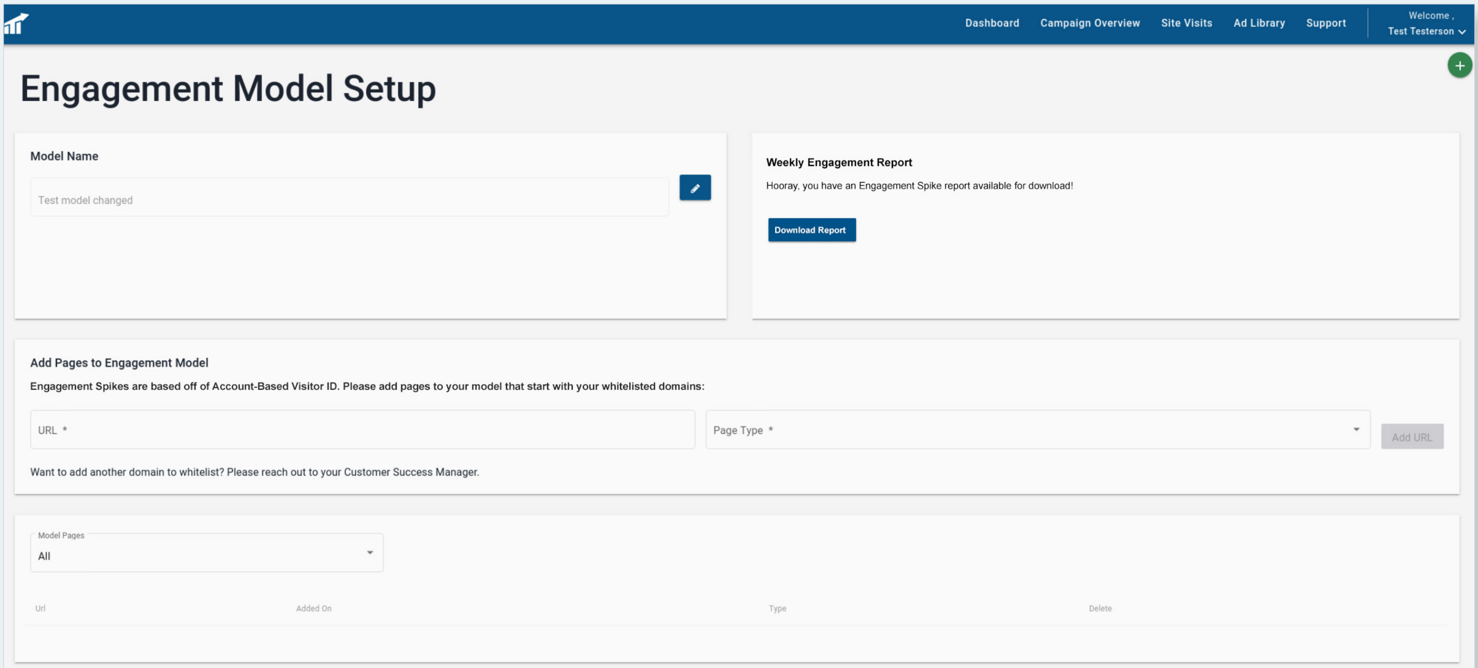


STEP 3: Input data into your Engagement Model

1. Name your model. Choose something identifiable, like a goal, product line, business unit, or something that your internal teams will recognize.

2. Input the URL for each page that you want to track and select page type (High Value or Brand Awareness).
   - URLs must be from the whitelisted domain or subdomains.
   - The URL must match the same structure as the whitelisted domain or subdomains. For example if the domain shows the "www," then your URL must also have the www.

3. You can wildcard by adding an asterisk (*) to allow you to include all of the pages that are below a specific URL. For example, to include all of your blog posts, you would wildcard with **www.yourcompany.com/blog/*.**



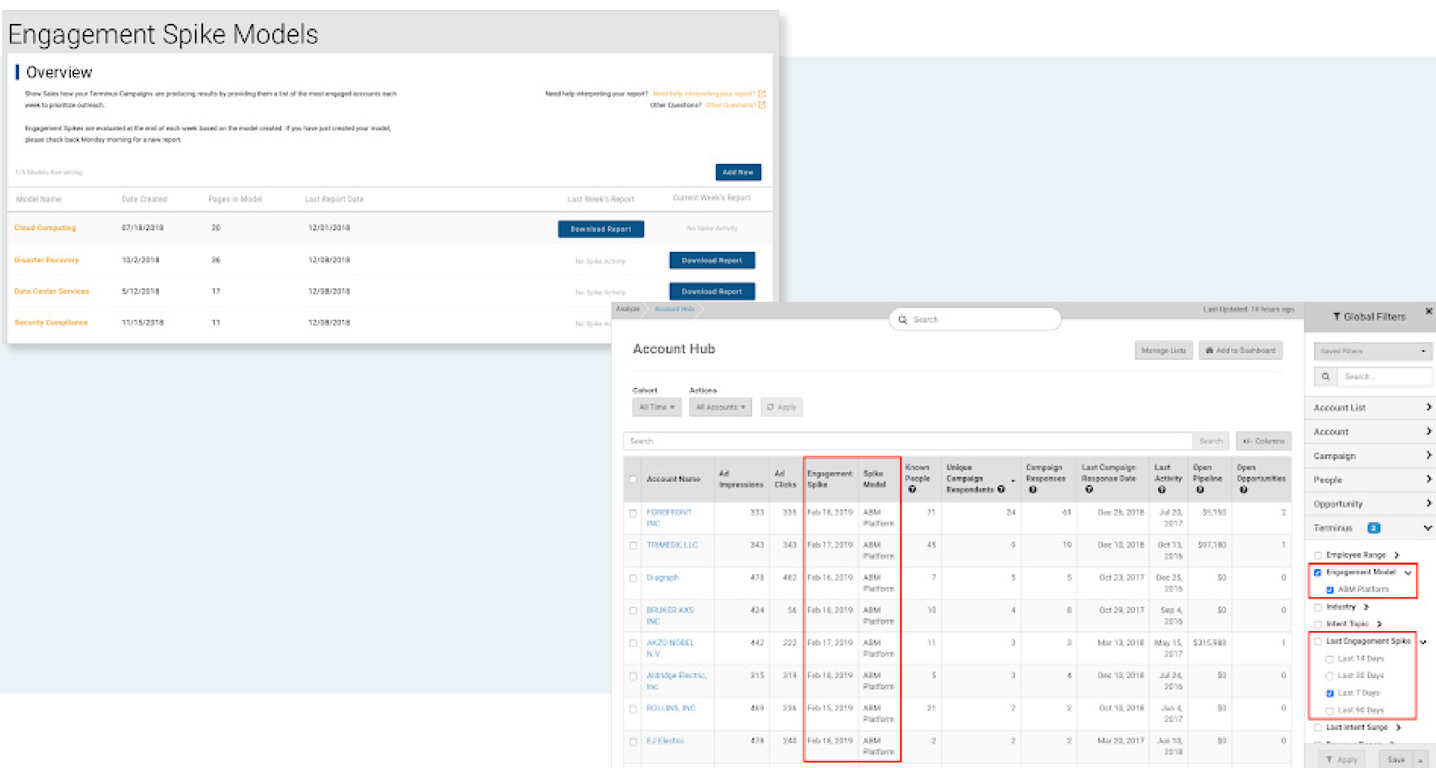
HOW TO USE MULTIPLE ENGAGEMENT MODELS

Most Terminus customers have multiple product lines, business units, or sales verticals, and need a way to segment out their spike reports based on their offerings and internal structure.

While Engagement Models are initially set up in the Terminus Engage product, this information can also be pushed back into Salesforce, via our Sales Insights tool, or mapped to the Terminu Account Hub for additional segmentation and reporting functionality, among other valuable use cases. Here are some examples of different model types you might create, and how you can leverage your reports to operationalize your internal teams.

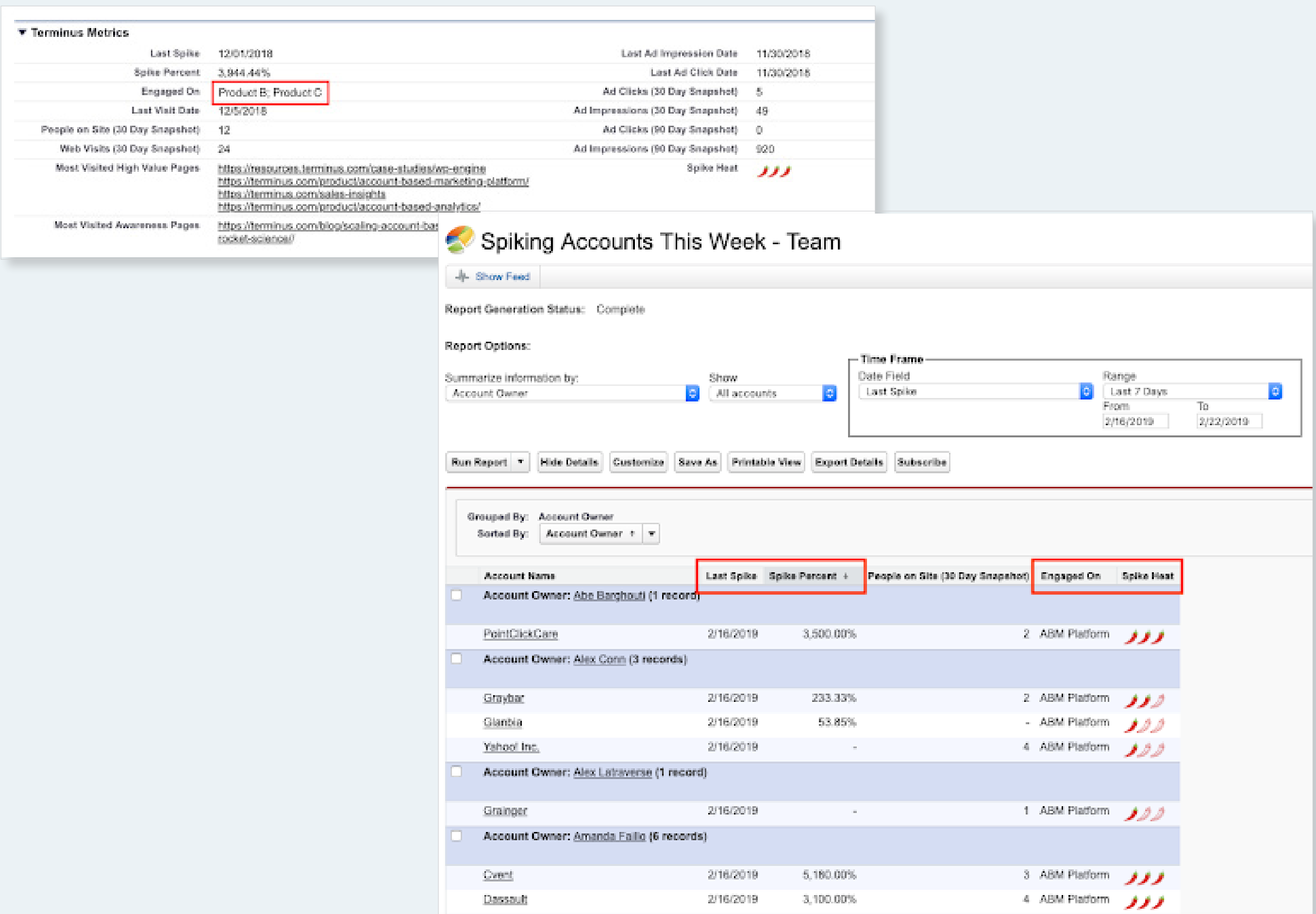
Create an engagement model for each product or feature, if those products/features have distinct URLs in your site structure. Include all pages relevant to each product or feature, such as support documentation, information on pricing, and descriptive product pages:

- Download spike reports to show sales which product an account is interested in with much higher confidence.
- Use your models to create segmented Account Lists in Account Hub, via our Terminus Global Filters, then run customized advertising campaigns to those accounts with creative specific to that product or service.



Created models for known topics in the sales cycle.

- If you have a long sales cycle with many steps of information gathering (e.g. security, technical evaluation, etc.), you can use Engagement Models to help sales reps proactively reach out with the right information at the right stage of the sales process.
- The marketing team can use the same model to create a hyper-targeted advertising campaign based on the Engagement Model topic and the account's stage in the sales cycle (from CRM).
- For customers that have installed our Sales Insights tool, you can create customized reports based on your Engagement Spike models to help Sales customize messaging, prioritize outreach, and identify upsell opportunities based off of account interest and engagement



For more information or if you have questions, please visit our knowledge base article: **http://bit.ly/2sHqQ5p**
If you'd like assistance with setup, please contact your Terminus CSM.