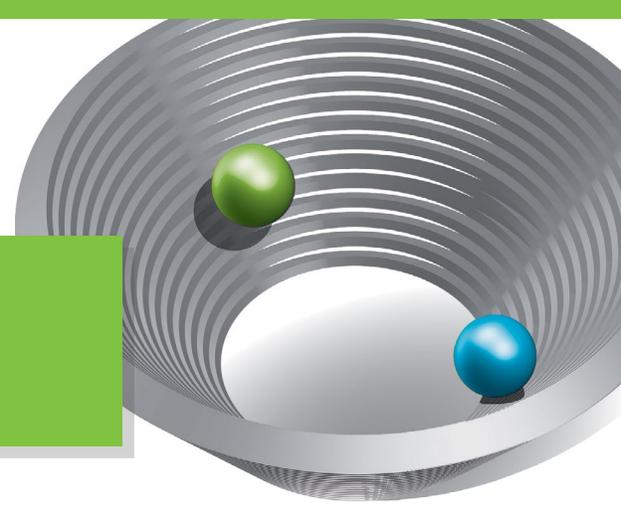




FUNNEL REPORTS



ACT-ON SOFTWARE:
AS SIMPLE AS YOU WANT.
AS ROBUST AS YOU NEED.

DEFINE, TRACK & MEASURE YOUR ENTIRE MARKETING-TO-SALES PATH ACROSS TIME

Act-On Funnel Reports let you track your prospects' journeys – step by step – as they travel through the unique stages of your sales process.

From initial engagement to conversion to post-sales and repeat sales, you can measure the effectiveness of your marketing and sales efforts in real time, ensuring that you always have the latest intelligence for critical decision-making.

Unlike traditional, static reports, Act-On Funnel Reports are dynamic; they continuously take snapshots of your data in order to deliver up-to-the-minute accuracy on what matters, such as lead flow and velocity, projected and actual revenue at conversion points, or comparisons across different time periods.

And because you have full control to define, create, and modify your marketing funnels at any time, you always know the current state of your entire opportunity pool and have actionable metrics to help you tune the dials and meet your goals.

Simple, powerful, and flexible, Act-On Funnel Reports are easy to set up, effortless to manage, and highly effective for understanding your buyer's journey and optimizing your revenue drivers.



WITH FUNNEL REPORTS, YOU CAN:

- Track and measure prospects as they move through the unique stages of your sales pipeline, in real time and across time.
- See revenue already achieved from wins, and gauge the value of your in-process revenue at each stage and conversion point.
- Create models that help you predict conversion timelines, uncover process gaps, calculate your forecast based on probabilities to close, and more.
- Gain insight into your current and historical performance, and identify where your processes are strong and where they can be improved.
- Generate integrated reports that pull from different sources – including your CRM – and show multiple dimensions of your marketing and sales efforts.

POWERFUL ANALYTICS TO MEASURE MARKETING EFFECTIVENESS.

VISUALIZE YOUR DATA, YOUR WAY

Act-On Funnel Reports put you in the driver's seat, letting you define your funnels based on the sequence and stages of your unique processes. With Act-On, it's your information, your way, displayed in real time, including:

Quick & Easy Setup. An intuitive interface and flexible Criteria Builder makes funnel creation a breeze. With minimal clicks you can define your stages, choose your reporting fields and segments, select your criteria, and you're done. Your funnel will begin running in the background, continuously collecting data, time-stamping engagement events, and at-the-ready with the most current intelligence.

Real-Time Tracking. Each prospect is monitored in real time, including demographics, engagements, important conversions, and more. This is key to your team's success because it establishes the foundation for understanding your marketing-to-sales cycles, including on-the-fly reports or in-the-future projections.

Actionable Analytics. Act-On's powerful analytics engine lets you measure what matters – including pulling data from your CRM and other external data sources. Full analytics integration lets you quickly understand critical performance indicators such as your total pool of open opportunities, conversion rates, lost-opportunity rates, and won revenue. Always-on algorithms continually crunch the numbers, so you have what you need to optimize performance.



ANSWER CRITICAL QUESTIONS

When it comes to driving revenue, you're only as successful as your most vulnerable opportunity stage. Act-On Funnel Reports answer key questions that help you identify strengths and weaknesses in your sales process, as well as how they change over time.

For example:

- What's the current state of my sales funnel?
- What are my conversion rates? Have they changed?
- What's my current revenue? Has it changed?
- Which stage has a bottleneck? Why?
- Where are lost opportunities happening? At what rate?
- With which market segments do we perform better?
- Which lead sources are best for conversion?

By keeping a spotlight on these and countless other questions, you can continually adjust your marketing and sales efforts for optimal results.

The more you know ... the more you know.

“Act-On Funnel Reports allow us to finally show clients how funnel-based marketing is contributing to their bottom line.”

— Brandon Larocque,
Managing Partner, Access Marketing Company

ABOUT ACT-ON SOFTWARE

Act-On Software delivers cloud-based integrated marketing automation software. Marketers can manage all their online marketing efforts from a single dashboard that can be seamlessly integrated with CRM, giving sales access into various marketing functions. Act-On's fresh approach to marketing automation gives its users full functionality without the complexity other systems impose, and makes campaign creation and program execution easier and faster.

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