

Approving Stages and Assigning Leads to a Revenue Model

Get your **Revenue Model** up and running by adding existing leads, creating assignment rules for any new leads.

What's in this article?

[Approving Stages](#)

[Assigning Existing Leads](#)

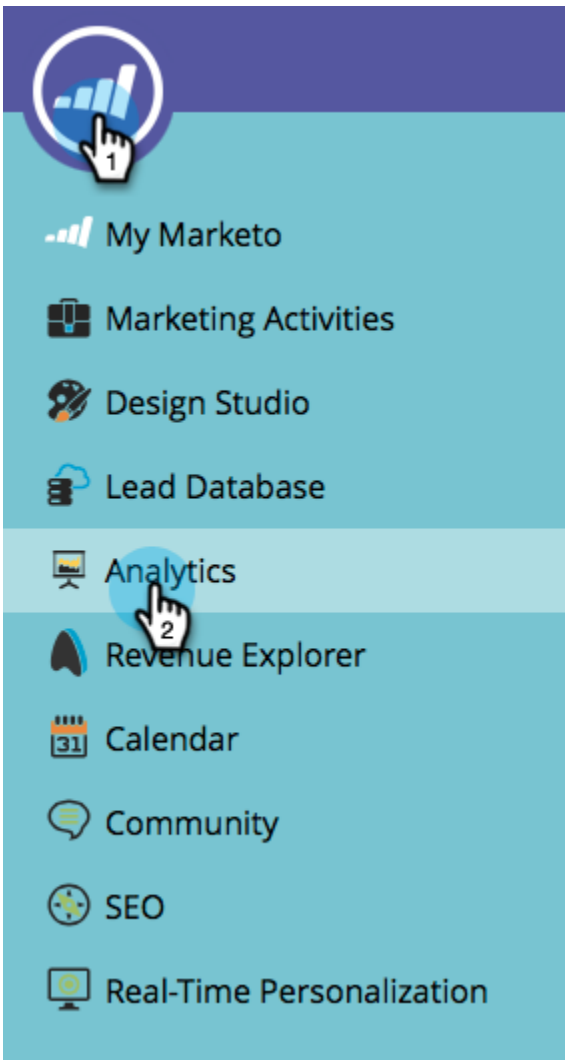
[New Leads: Create Assignment Rules](#)

[Example Assignment Rule](#)

Approving Stages

Let's approve the stages of your model before you add any leads.

1. Go to the **Analytics** area.



2. Select the model whose stages you'd like to approve.



Analytics...



Analytics

Group Reports

Revenue Cycle Modeler

Group Models

AdWords Example

My New Model

Success with Detours Clone

Marketo Examples

Success Only

Success with Detours

My Reports


3. Under **Model Actions**, select **Approve Stages**.

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar has a header with a bar chart icon and the text "Analytics...". Below it, a list of folders and models is shown, with "My New Model" highlighted in orange. The main content area has a header with "My New Model" and "Edit Draft". A dropdown menu is open, showing options: "Model Actions", "Edit Draft", "Preview Model", "Approve Stages", "Clone Model", and "Delete Model". Below the menu, a table displays model details:

Model Status:	Draft
Approved:	No
Stages:	7

4. You'll be greeted with an alert; click **Assign Leads**.

Approve Stages ×

 Stages are available in Smart Lists
Use the Flow Step: **Change Revenue Stage** to assign leads or just approve the model to activate

CLOSE ASSIGN LEADS

Excellent! Let's move on and assign those leads.

Assigning Existing Leads

[Create a Smart List](#) to identify the leads for one stage of your model in your Lead Database.

1. Once you've [created your Smart List](#), click the **Leads** tab.

📧 Notifications

Program Smart List **Leads** Smart List

New ▾
 List Actions ▾
 Lead Actions ▾
 Delete Lead
 Select All

📄 View: Default ▾

Id	Last	First	Job Title	Company	Email
1	Ginsberg	Frank			frank@xyzdom
2	Hartman	Carley			carley@xyzdom
3	Troy	Marsha	VP of Sales		mtroy@xyzdom
4	Thompson	Earl	Manager		earlt@xyzdom
5	Wendel	Jenny			jenn@xyzdom
6	Kim	Victor	Manager		vkim@xyzdom
7	Florez	Amy	CEO		amy@xyzdom
8	Donaldson	Scott	Manager		sdonaldson@xyzdom
9	Rolfe	Lawrence	VP of Marketi...		lrolfe@xyzdom

2. Click **Select All** to select the leads.

Notifications: 0

Program Smart List | Leads | Smart List

New ▾ | List Actions ▾ | Lead Actions ▾ | Delete Lead | Select All

View: Default ▾

Id	Last	First	Job Title	Company	Email
1	Ginsberg	Frank			frank@xyzdomain.com
2	Hartman	Carley			carley@xyzdomain.com
3	Troy	Marsha	VP of Sales		mtroy@xyzdomain.com
4	Thompson	Earl	Manager		earlt@xyzdomain.com
5	Wendel	Jenny			jenn@xyzdomain.com
6	Kim	Victor	Manager		vkim@xyzdomain.com
7	Florez	Amy	CEO		amy@xyzdomain.com
8	Donaldson	Scott	Manager		sdonaldson@xyzdomain.com
9	Rolfe	Lawrence	VP of Marketi...		lrolfe@xyzdomain.com

3. Open the **Lead Actions** drop-down and select **Special**. Click **Change Revenue Stage**.

Notifications: 0

Program Smart List | Leads | Smart List

New ▾ List Actions ▾ Lead Actions View Lead Details Merge Leads Marketing Programs Special Change Lead Partition... Change Revenue Stage... Delete Lead Give Credit to Referrer Request Campaign... Remove from Flow...

Id	Last	First	Company	Email
1	Ginsberg	Frank		frank@xyzdomain...
2	Hartman	Carle		carle@xyzdomain...
3	Troy	Marsha		
4	Thompson	Earl	Manager	
5	Wendel	Jenny		
6	Kim	Victor	Manager	
7	Florez	Amy	CEO	
8	Donaldson	Scott	Manager	
9	Rolfe	Lawrence	VP of Marketi...	lrolfe@xyzdomain...

4. Select the correct **Model** and the correct **Stage**. Click **Run Now**.

Run Action

This will affect approximately 9 lead(s)

Change Revenue Stage

Model: My New Model New Stage: Select...

- None
- Known
- Lead
- Sales Lead
- Opportunity
- Won

CANCEL RUN NOW

5. Repeat until all your leads are assigned to the various stages of your model.

Great! To specify how new leads are assigned to stages, create assignment rules.

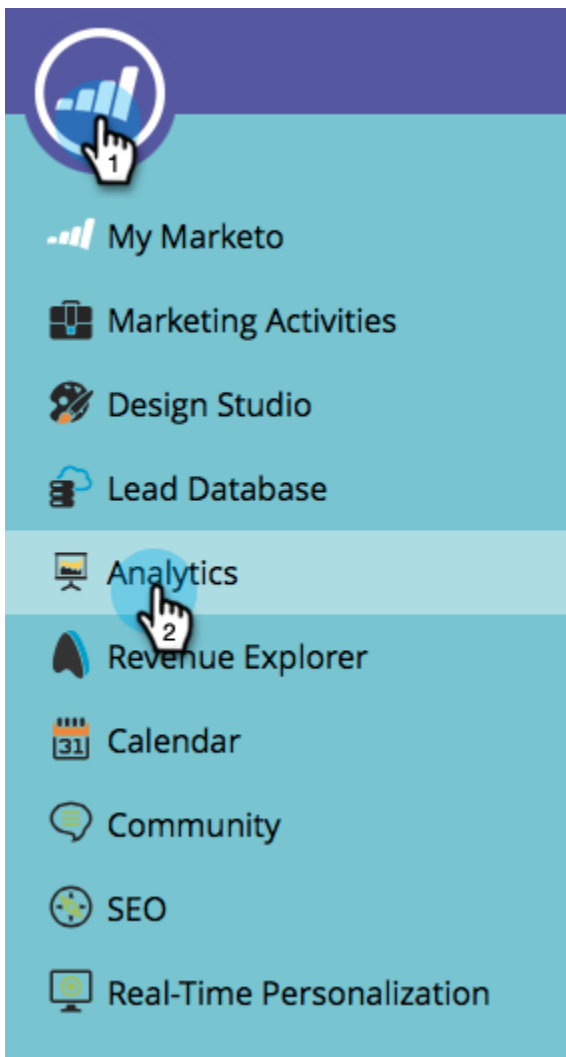


Note

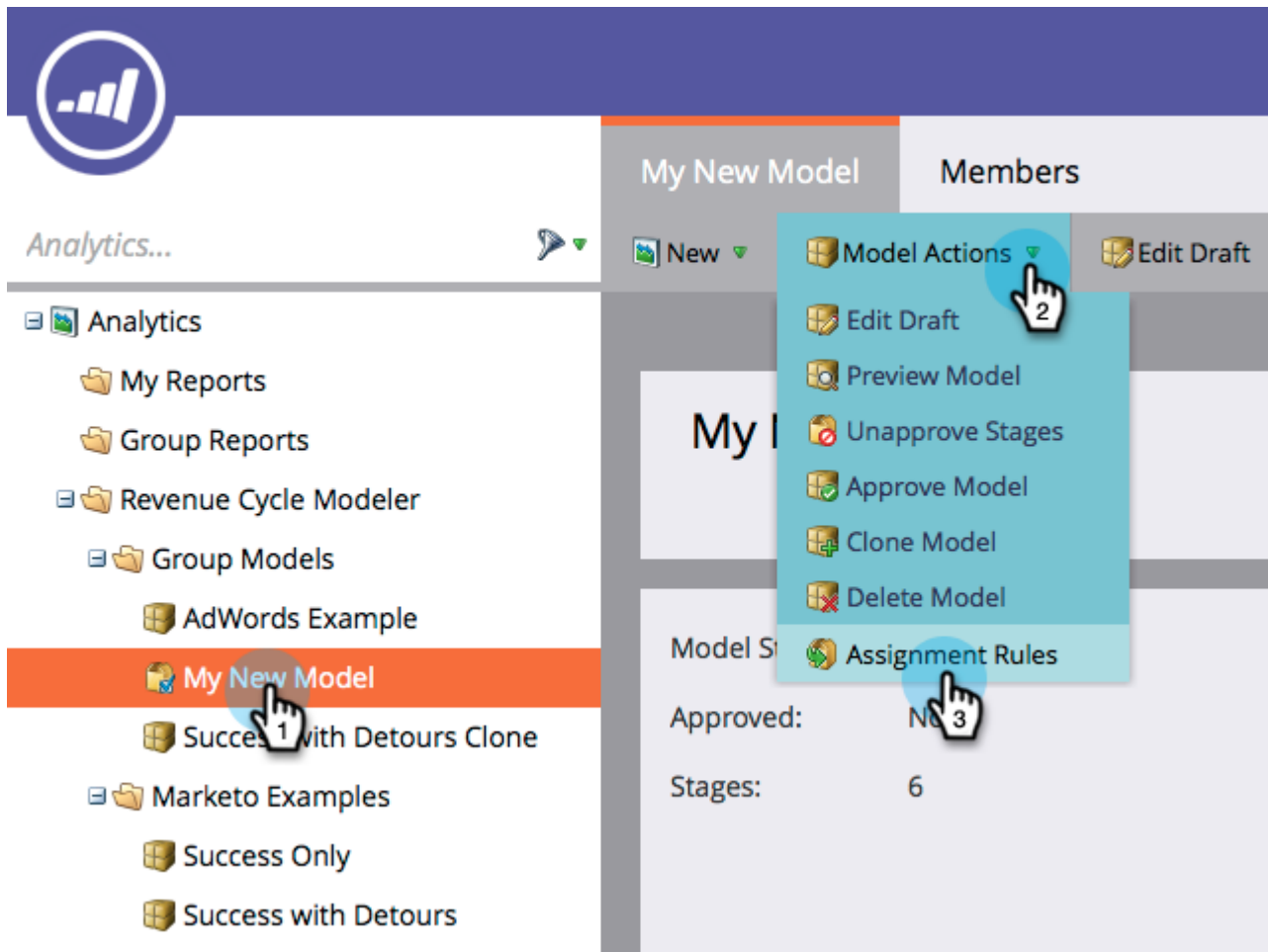
If your model is in the Approved Stages state, you will not see any Change Revenue Stage events in the leads' activity logs. If your model is fully approved, this flow step will be skipped if you move a lead into the same stage it's currently in.

New Leads: Create Assignment Rules

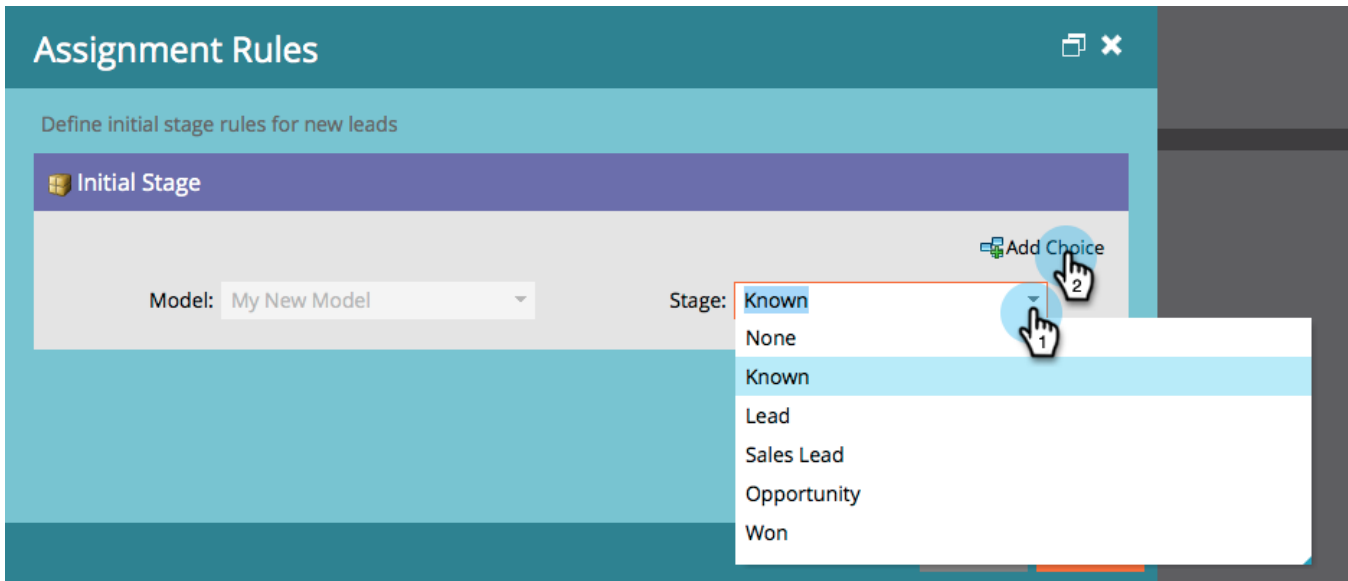
1. Click **Marketo Home** again, then select **Analytics**.



2. Click your model in the tree, then the **Model Actions** menu, selecting **Assignment Rules**.



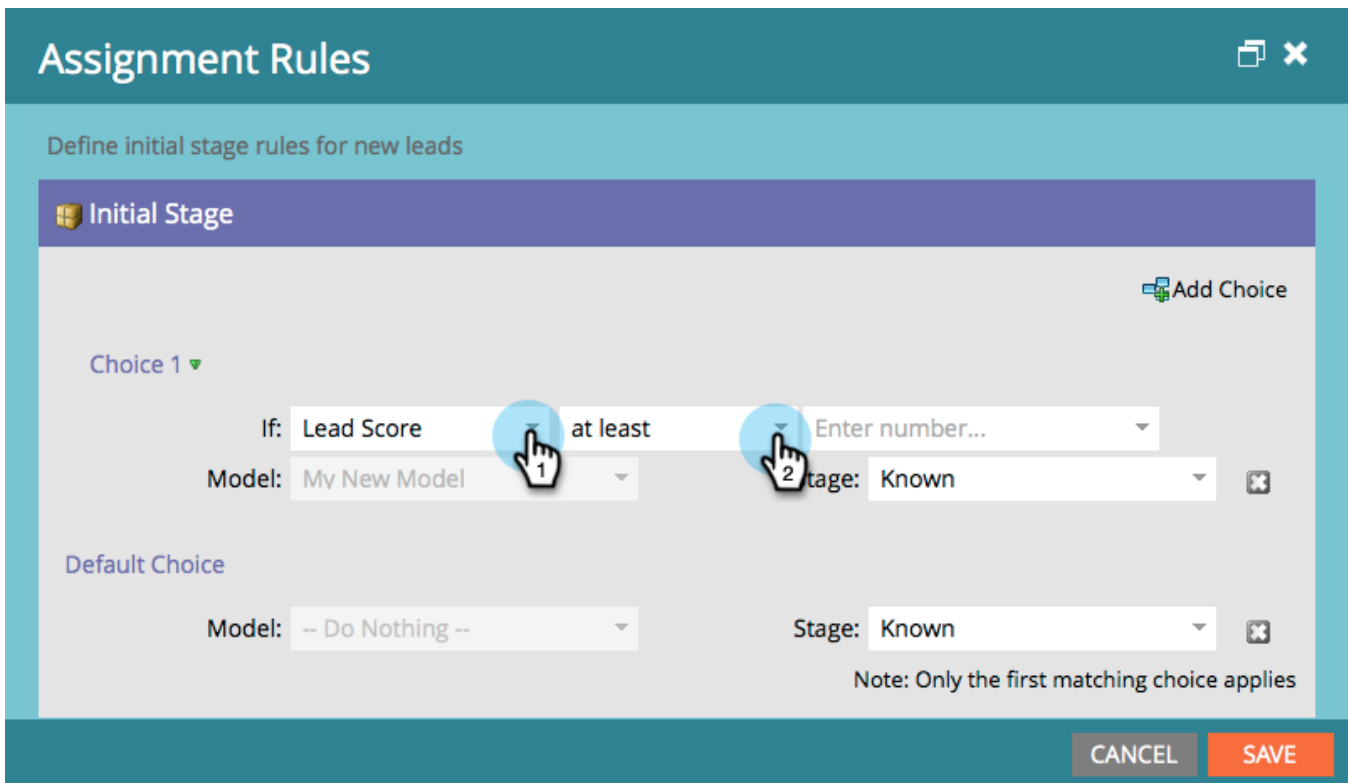
3. If your assignment rules contain more than just one default choice click **Stage**, make your selection, then click **Add Choice**.



Example Assignment Rule

Create a Lead Score rule to assign the new leads with a minimum score to an appropriate step.

1. Under **If**, select **Lead Score**. Then choose **at least**.



2. Enter **40** in the field and select **Sales Lead** as a Stage. Click **Save** to complete.

Assignment Rules



Define initial stage rules for new leads

Initial Stage

Add Choice

Choice 1 ▾

If: Lead Score ▾ at least ▾ 40

Model: My New Model ▾

Stage: Sales Lead ▾

Default Choice

Model: -- Do Nothing -- ▾

Stage: Known ▾

Note: Only the first matching choice applies

CANCEL

SAVE

Related Articles

To approve your model, read our help page on [Approving and Unapproving a Revenue Model](#).

