The Marketing Rockstar's Guide to Marketo
by Joshua D. Hill

First Edition, March 2013.

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Marketo, Inc. and/or its employees or former employees did not write this guide. It is an independent project.

The Marketing Rockstar's Guide is meant to provide illustrations of how to use Marketo for business purposes. The examples are culled from best practices as well as Marketo's own workflows. There is no intention to provide advice leading to any specific result, business or otherwise. Please use the examples as a guideline; they may not always be appropriate for your business or systems, so be careful. Please exercise common sense when applying examples to your own business.

Links to external resources are provided as additional resources, I do not necessarily endorse any firm. Their content and claims are their responsibility. No affiliate links are included in this Guide.

Josh Hill and/or Marketing Rockstar Guides do not claim any responsibility for your use or misuse of the information provided. Please consult an appropriate expert if you are ever uncertain about using Marketo. References to laws and legal situations are not intended as legal advice. Please seek legal counsel in your jurisdiction in regard to any legal situations related to your use of Marketo.

No personally identifiable or proprietary information is displayed in this Guide. Any email addresses or domains shown are for illustrative purposes and are unlikely to be real sites, emails, or domains. Slides and screenshots are used with permission or within fair use rules. Use of Case Studies or other examples from real companies or consultants are provided with permission, which is noted whenever those appear in the Guide. If you find their ideas helpful, thank them!

If you discover an error or question regarding the accuracy of claims, examples, or steps, please email me: `corrections@marketingrockstarguides.com`.

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Principal, Marketing Rockstar Guides

At a Glance

Overview

This is the guide I wish I had when I started using Marketo in 2010. It is much more than that vision now. It's the Marketo Guide you wish you had yesterday and I hope it's the guide you need right now. Marketo is a fantastic tool for marketers like you and me, yet it is not always clear how to attain our marketing goals using it. In writing this guide, along with my collaborators, my goal was to provide a clear way for you to do the most common marketing tasks using Marketo. In other words, I translated your real life problem into a solution using Marketo's campaigns, programs, lists, and workflows.

Of course, each company is different and you may find it necessary to modify the steps you find here to match your unique situation. Please do so! This is a guide, a template, but not the instruction manual for your firm's marketing plan. As you become proficient in using Marketo, you will develop unbelievable skills and systems to automatically run much of your marketing. (If you develop a solution to a marketing problem not seen in these pages, let me know! I'll feature you in the next edition).

A quick note about payment

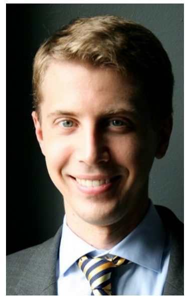
This Guide is not free. It is a reasonable price compared to its true value of helping you generate millions of dollars from your marketing efforts. And it's a very small fee to help you get moving faster on the funds you pay to Marketo.

I hope you will remember that your fee entitles you to **one copy** of the e-book (or print copy). If your team needs more than one copy, please pay for more than one license or print copy. I would do the same for you.

Sign Up for Updates!

As an added bonus, I may invite List Members to special projects or early releases of chapters as they come out. That means a few extra days of Marketo excellence before your competitors. Be an insider, sign up today.

A Bit About Josh



Josh Hill is an experienced marketer at the nexus of sales, technology, and marketing. He began using Salesforce in 2007 and quickly became a power user, laying the foundations for his first Marketo integration in 2010. That Marketo experience sparked the early versions of this guide you have today.

Josh uses the Golden Rule to create delightful customer experiences, develop new products, and to run businesses. The Golden Rule is the ultimate expression of being customer centric.

Josh works with technology and media firms to develop demand generation programs across all channels. He works with Marketo+Salesforce integrations and advises on best practices marketers can use for revenue performance management. Josh has worked with media and technology firms in Singapore, New York, Boston, and San Francisco. Josh is Vice President of Marketing at Alacra where he runs demand generation, inbound marketing, and marketing operations. Josh is also a Marketo Certified Expert and Marketo Champion.

Contact Josh at josh@marketingrockstarguides.com or visit one of his blogs:

Marketing Rockstar Guides	Demand Generation and Marketing Automation
JDavidHill.com	Personal Site
Golden Rule Now	Dedicated to using the Golden Rule for better business practices.

Connect with Josh

Who is this guide for?

In many ways, this guide is a re-organization of the Marketo documentation, community discussions, and my experience using the system. The guide can be used as a reference for the skilled user or a How To for the newbie. When possible, I provide step-by-step instructions. For some situations, I will point you in the right direction for you to find a solution.

The Guide is primarily intended for those with about 6 months of Marketo experience. The Guide is for business-to-business marketers using the Standard, Select, or Enterprise Editions with Salesforce.com. This guide does not technically cover Spark, but Spark users will find this guide to be helpful. Of course, plenty of other users can make the most of this Guide, possibly learning neat tips and tricks or as a reference for power users:

Marketo Experience	What You Can Gain	Best Way to Use this Guide
Pre-Start – Building Your First One	Whether you've run automation systems before or not, there are some key steps and technical issues to be aware of before you begin. You may find time to rethink your sales funnel tracking too.	Read the sections on Lead Management, Data Management, SFDC Integration, and Lead Scoring.
Quick Start Newbies (0 – 6 Months)	I'll show you how to setup webinars, events, and even a few tricks they didn't share with you during setup.	Got to send that email now? Check the Sending an Email section or Setup a Webinar now.
Solid Users (6-18 months)	You want to go beyond Send Email and start Nurturing and Analytics. Great! Let's do that together.	Learn a bit more about AB Testing, Advanced Nurturing, and Analytics.
Power Users (18+ months)	Use the Guide as a reference of filters, triggers, etc. as well as a starting point for RCM and RCA if you are going in that direction.	See the Appendix in the back! Or thumb through for trickier situations. If you can't find an answer, email me so we can add it later.

Sponsors

I want to thank David Carnes, President of OpFocus, Inc. and his entire team for their support over the past year. From sub-contracts to business advice, David has been a surprising friend and benefactor.

OpFocus was founded in 2006 with the goal of helping companies run their businesses better. OpFocus is a dynamic and fast-growing consulting group that delivers business solutions to clients by customizing applications such as Salesforce.com, Marketo, and other integrated tools. The OpFocus team takes pride in their work, and look forward to growing alongside customers and devising solutions to the new challenges they face.

OpFocus partners with sales, marketing, and support teams in a broad range of verticals to implement new applications or build upon existing systems to better meet the needs and reach the goals of clients.

If you need a Salesforce Certified Consultant to help you go to the next level, I urge you to call David today to discuss your sales and marketing operations needs with him.

OpFocus and David Carnes can be reached at

25 Burlington Mall Road, Suite #407

Burlington, MA 01803

Phone: +1 781 262-3400

**Disclosure: OpFocus provided me with airfare to the Marketo Summit 2013 and a registration pass.*

Acknowledgements

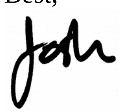
As promised, this is the acknowledgements page for people who helped me with this guide with their advice and more importantly, submissions of How Tos, Case Studies, and Reference Guides.

Person	Contribution	Contact
Sam Boush	Forms Case Study	info@leadlizard.com
Ryan Vong	Ideas for Guide	ryan.vong@gmail.com
Zak Pines	Ideas for Guide Demand gen mentor	Marketing Director Ipswitch File Transfer
Jep Castelein	Providing much needed Marketo assistance and reviewing the Guide	Principal Consultant Marketo
Nic Zangre	Advice and being a great guy.	Vice President, Revenue Marketing Innovation, The Pedowitz Group
Jason Long	Token help and great guy	Director of Demand Generation The Pedowitz Group
Lev Barenboym	Template design and layout. Copyediting and more.	lbaremboym@gmail.com Also great at database programming.
Robbie Mitchell	Modular Nurturing Guide	marketo@robbiemitchell.com
Eric Hollebone	Advanced Nurturing Inspiration and Marketo Ultimate Champion	Test.hollebone.ca is a tremendous resource for technically inclined.
Phil Dolan	Video in Marketo Slides and Case Study	Navicure
Alexandre Pelletier	Getting Started with RCA	www.apelletier.com 514-913-3039 alex@apelletier.com
Stephanie Worthington	SFDC Integration	Coraid – Stephanie@coraid.com
Brian Wood	Advanced Nurturing Deep Dive Slides	Director of Marketing Radisys
Steve Blanco	Cover Art	Graphic Design Pro
Ryan Nichols	Marketo Integration and API Slides	Vice President, Apps Podio

Person	Contribution	Contact
Andrew Hull	Nurturing Case Study	President, Elixiter
Heather Watkins	Keeping me connecting to the Marketo world and employed!	Director of Community Marketo
Liz Courter	Being a tremendous community manager	Community Manager Marketo
Autumn Tyr-Salvia	Detailed email reputation management review.	Email Deliverability Guru, Marketo
David Carnes	Salesforce expert and business mentor.	OpFocus.com

I have noted people throughout this guide through links or call outs. If I missed you, I apologize in advance. I also want to thank the many fine folks at Marketo, Marketo Support, and the Marketo Community for their support, guidance, and submissions to this Guide.

Best,



Josh Hill
Demand generator

Before you begin

The Marketing Rockstar's Guide to Marketo assumes you have some basic knowledge of the system including understanding the terms Campaign, Smart List, Static List, Program, and Flow. We will definitely go through these in some detail, however, the Guide is meant to help you get results from Marketo.

That being said, we will cover a number of setup topics with step-by-step explanations to help you more deeply understand what you can do with the system.

Formatting of the Guide

The Guide is formatted to help you use Marketo in common modern marketing situations. I assume you are somewhat familiar with Marketo's terms and general layout. There is a helpful Glossary at the end of the Guide. Here are the key things you need to know about the layout.

Font text will change depending on what I am discussing. Aside from the headers, watch for these styles:

Regular Text

`Filter, Trigger, Example Name, Commands or programming code`

Boolean or filter commands: `STARTS WITH OR AND IS or IS NOT`

E.g.: use the filter `Member of Smart List IN Test Leads`

Step 1: Used in How Tos to denote main steps

Icons

There are four icons used to bring attention to a key point. Heed them.

Caution! Be careful. What you are about to do may affect other things more than intended.

Note. A helpful reminder about what is going on.

Best Practice: a friendly reminder on the ideal way to handle a situation.

Warning! Expect a database meltdown of epic proportions. Ok, maybe not. But this is a serious alert.

Glossary of Common Terms

Marketers like to use our own language, even special jargon in subsets like demand generation and marketing automation. Marketo has its own terminology as well, which sometimes I translate into my own way of thinking. I tend to switch between these and have done my best to be consistent. Please be advised:

Term	Definition
Action	Sometimes used to refer to a Flow. Also can refer to the Flow Actions you manually run using the Lead Database List View.
Campaign	Campaign or Smart Campaign. May refer to the entire Campaign Program such as a white paper promotion.
Channel	Often refers to the Channel Tag and Progressions. May refer to a marketing channel such as Email or Webinars.
Conversion	Usually refers to a Form Fill Out on a Landing Page. Can also refer to success points in the sales funnel.
Flow or Workflow	This is the Flow component to a Smart Campaign and may refer to the entire Campaign. It is what we do to leads that qualify.
Import or Upload	Are equivalent.
Lead	Almost always refers to a record in Marketo or Salesforce (SFDC Lead OR SFDC Contact). May be lowercase sometimes.
Live Event	Always refers to a trade show, roadshow, or "in-person" and offline event.
Member	Member of a Marketo Program. SFDC Campaign Member is often explicitly used.
Nurturing	Nurturing programs or systems of any type.
Program	Almost always refers to a Marketo Program and its child components.
Status	Usually context specific, such as Lead Status (position in funnel) or Member Status (position in Program).
Webinar	A webinar or webcast, recorded or live. Vendor neutral.

Online Content

During the course of this guide you will find hyperlinks to online content. The existing Marketo Documentation and Marketo Community offer excellence resources, many of which I draw upon. Each chapter has a Recommended Resources summary of useful documentation or expert articles. I also include links to my own content seen on my blog at MarketingRockstarGuides.com. Extra content is [also available here].

Chapter Layout

Each chapter is based on a specific function of Marketo or a marketing action, such as Running a Webinar. A typical chapter covers

Feature or Purpose

An introduction to the feature with screenshots or overview. For a marketing action, such as a Nurturing Program, I will discuss some key reasons or issues. In most cases, I am assuming you are familiar with the core concepts.

Basic Concepts

While I assume you know what an Email or Landing Page is, I do not always assume you understand how Marketo handles certain things. Here we will go through the basics. For feature use, this is straightforward. For a major marketing concept, such as Email Reputation, I will discuss the individual issues in detail.

How To…

The part you bought this Guide for. How to setup Tags, or a nurturing program, or whatever. Marketo can do many things but its *value is in how you organize its features* to fit your needs.

Recommended Resources

I peppered this Guide with direct conceptual links right back to sources or experts. I also summarize them here for your benefit. Some chapters will include a FAQ.

How to Make the Most of the Guide

You can use this guide from start to finish to learn a ton about Marketo.

A better way is to use this as your trusted colleague. Refer to the Guide with a question about how to do something. Use it as a visual instead of the monitor. Use it to get ideas. Use it well and use it wisely.

Ok, let's get moving because you need leads. Leads now.

Chapter 6. Getting Help

At a Glance

Overview

Before we get any further, let me show you the other resources available to you online. Marketo does have extensive resources online for customers only. These include self-help documentation, advice, and training. You can also leverage the collective Marketo mind by asking questions on the Community. For those tough technical issues, there is always Marketo Support. Let's go through each of these areas in more detail.

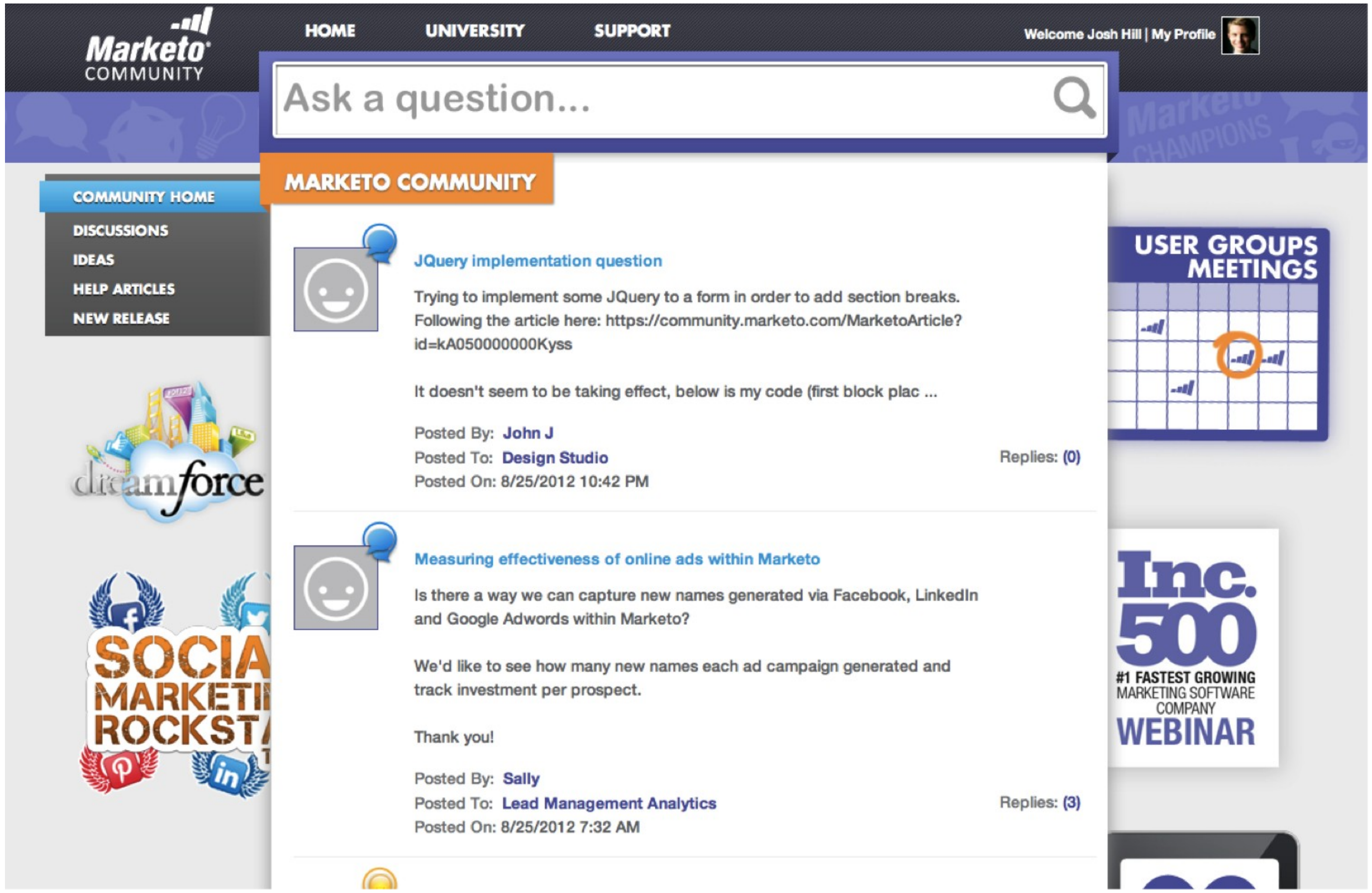
Marketo Community

This is by and large the best resource (other than this guide!) for help in using Marketo. The Community is a friendly place to meet users of all levels as well as employees. You can ask questions and hear from experienced users and staff on ways to handle a situation.

The Community also contains Help Files and Official Documentation along with Release Notes as Marketo adds new features.

The Community is also your access point for Support Cases, so let's take a look.

Home



Whenever you press Community or Help in the main Marketo console, you will find yourself here. The default view is to show the latest Discussions or Ideas. Feel free to join in!

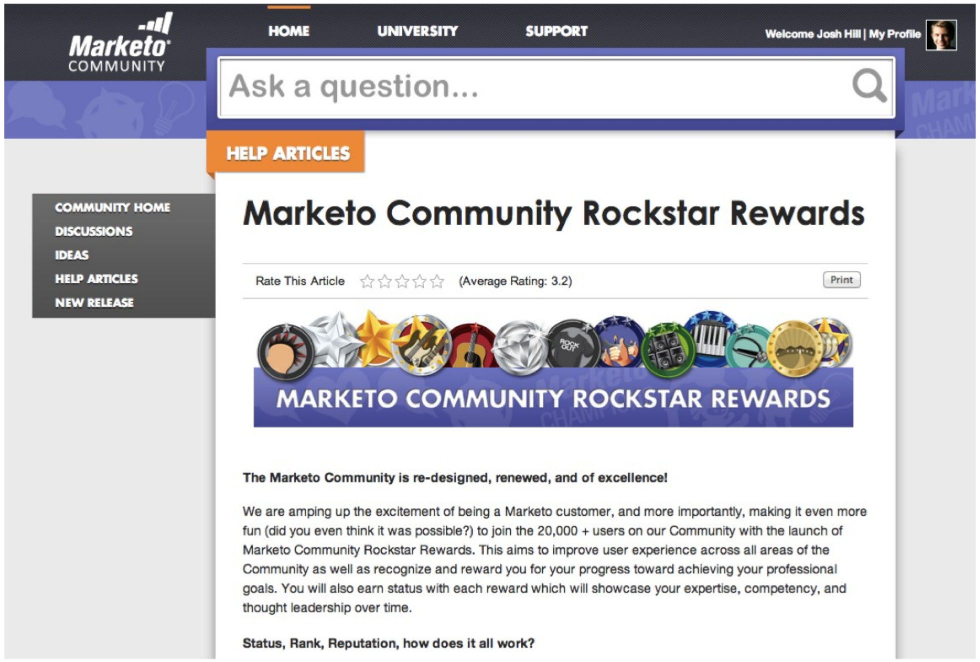
Here is a quick overview of what you see on the screen as of mid-2012:

- Top Navigation: `Home`, `Support` (use this to open a case), and `University` (training materials).
- Big Search Box: go ahead, ask what you’ve always wanted to know!
- Left Nav: fast links around and Marketo promotions.

- Right Nav: `User Group Schedule` and promotions

Rockstar Rewards!

Marketo added [Rockstar Rewards](#) to enhance the experience as well as provide incentives for everyone to answer and ask questions and post Ideas. You start at Beginner and can climb the ranks to Diamond Level and expert World Tour User. It's very cool and possibly will involve special rewards from Marketo.

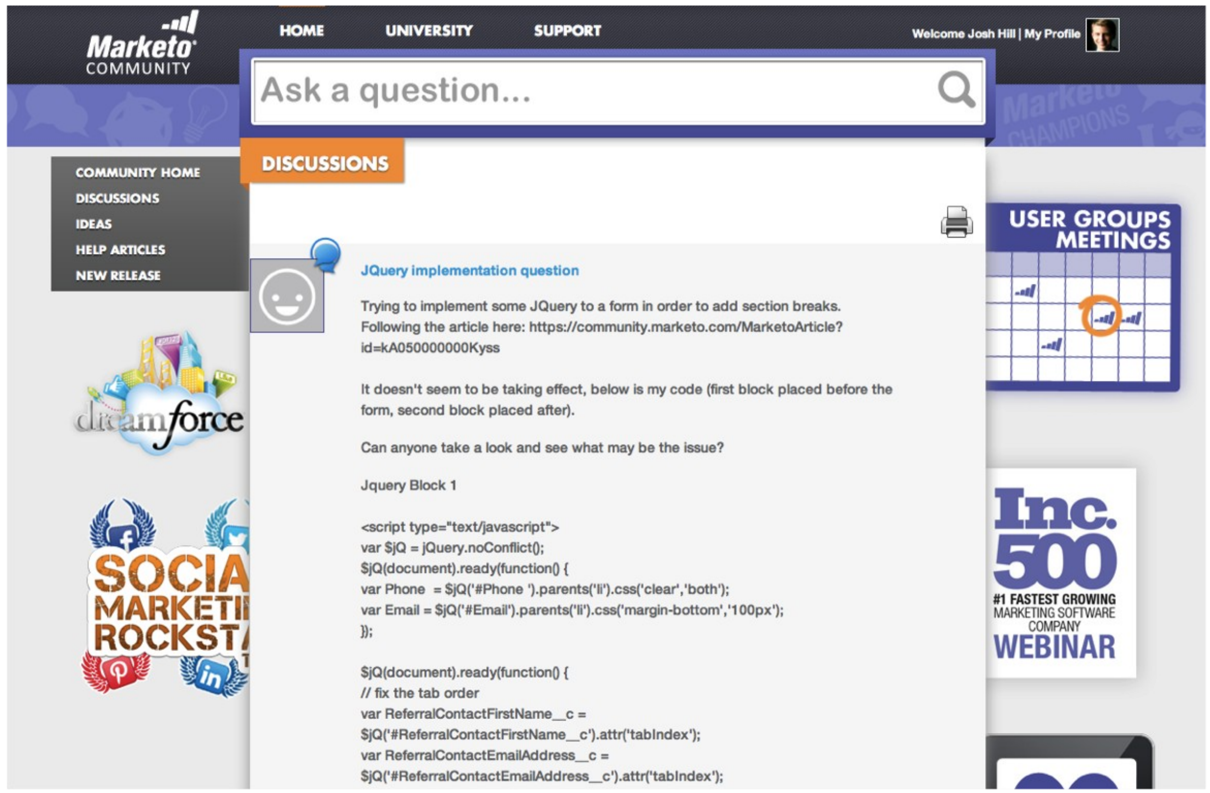


Click on `My Profile` to see your current rank and points.

Quite a few people outrank me!

Ask a Question

The big bar that says, "Ask a Question" is your friend. It auto populates just like Google does. The Search will then bring up relevant `Discussions`, `Ideas`, and `Help Articles` (documentation). Please do this first, before posting an `Idea` or `Discussion`. There's a good chance someone asked or answered what you had in mind.



Pro Tip: search Ask a Question before you post. Most common questions have already been answered.

Discussions

The greater part of the Community is here asking and answering questions. This is the cutting edge of making Marketo work for your business.

Click on Discussions to see a list of recent discussions. This is like a forum where Marketo users ask questions ranging from Newbie to Programming API stuff.

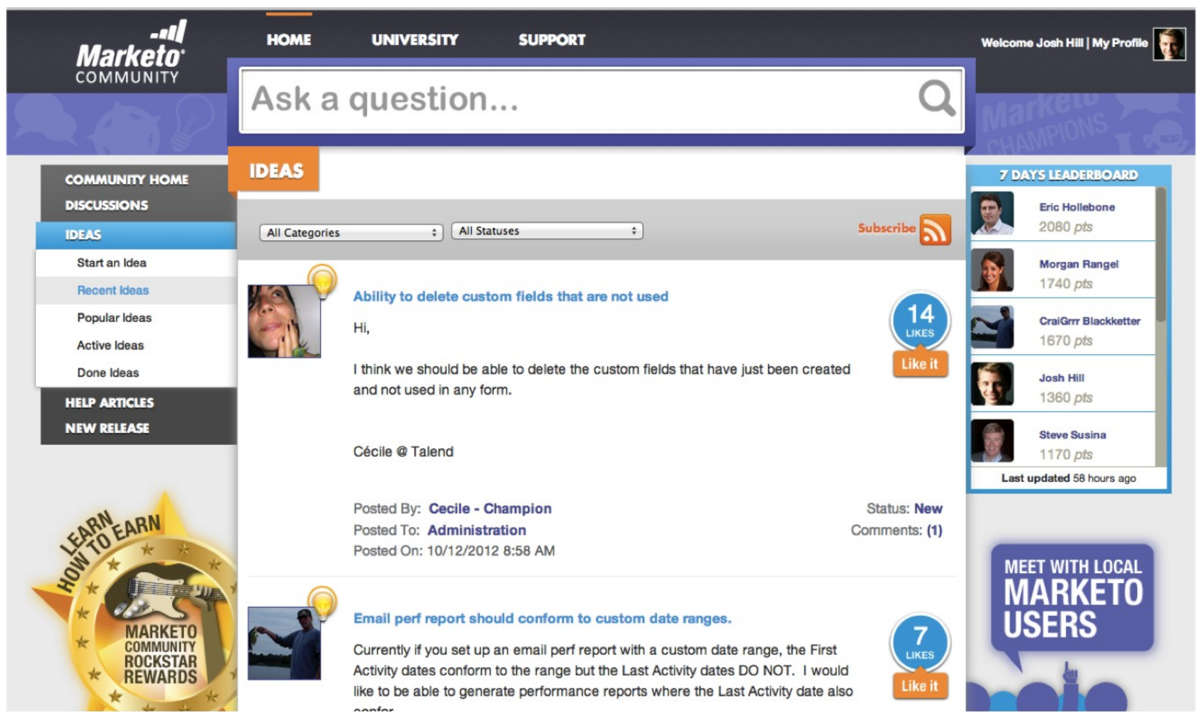
You can use the Categories bar to find specific areas, including Job Postings.

Use the RSS Feed to subscribe to All or certain Discussions.

Looking for a gig? Use the selector to find Job Opportunities.

Ideas

Click on Ideas. A light bulb icon and the "Like Counter" icon denote ideas. 



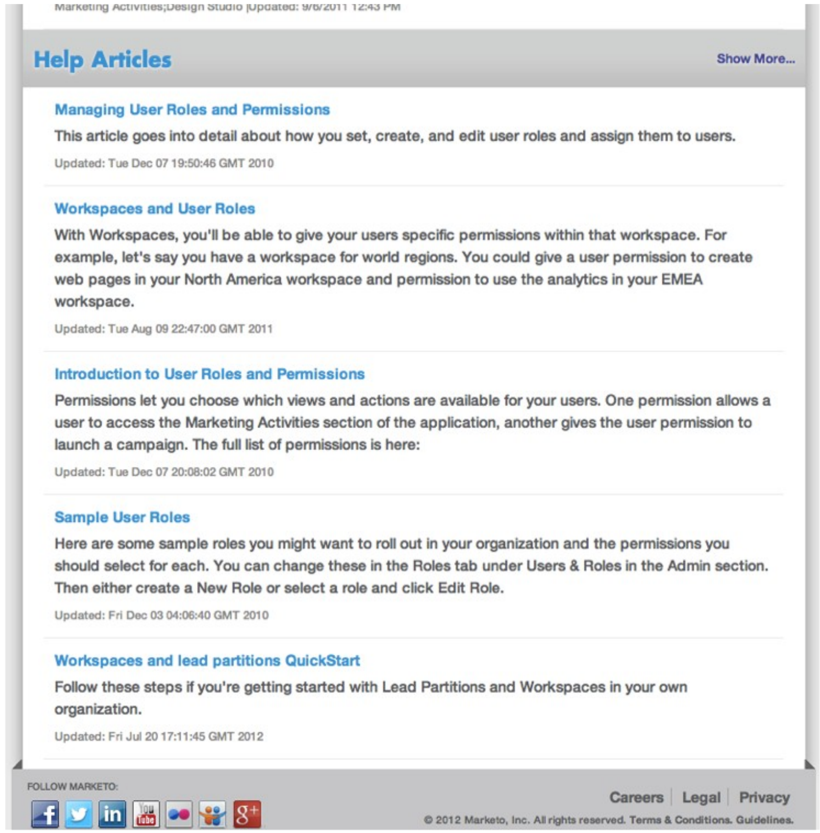
If you like an idea you see, press `Like It` to add your voice.

If you want to add a comment, you can click on the Idea just like a Discussion. You can also Add a New Idea or Subscribe to the RSS Feed.

Marketo Employees review each Idea and decide if they will implement it, which helps give users some sense of when the Idea will become a real feature. Sometimes Ideas end up in the `Treasure Chest` during testing. Check back with your ideas to see how Marketo views them:

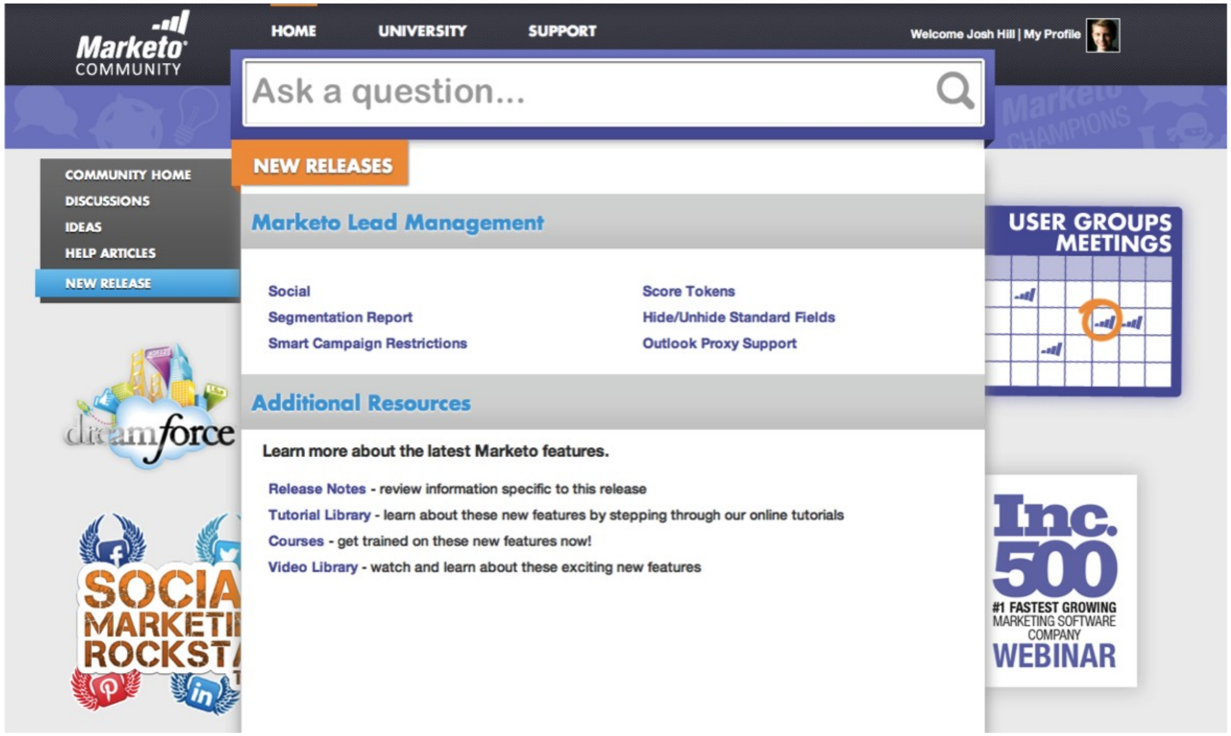
Help Articles

Help Articles include the official documentation written by my friends in Education at Marketo. The documents include best practices, feature uses, and common situations. I often refer to these articles throughout this Guide in case you want to review the original Marketo article.



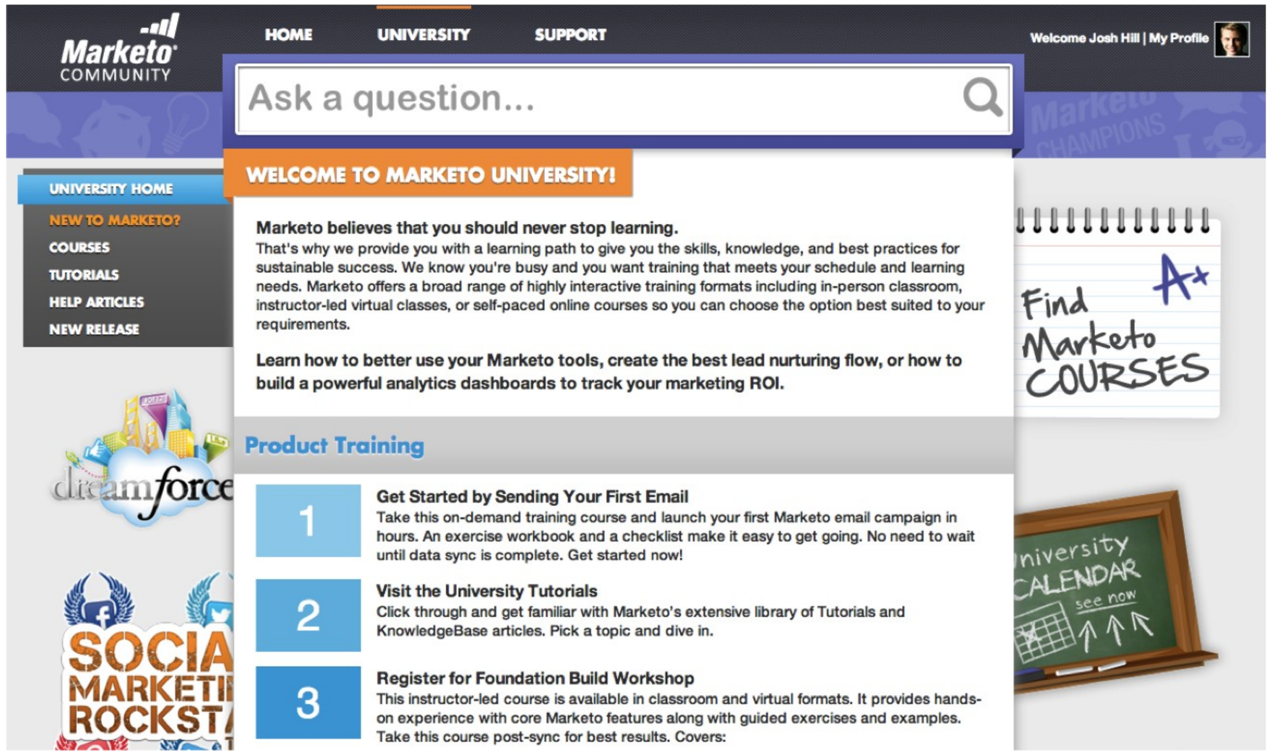
New Release

This section has announcements on New Releases of features as well as organizes documentation on recently added features. Check here about once a quarter for new things to do with Marketo.



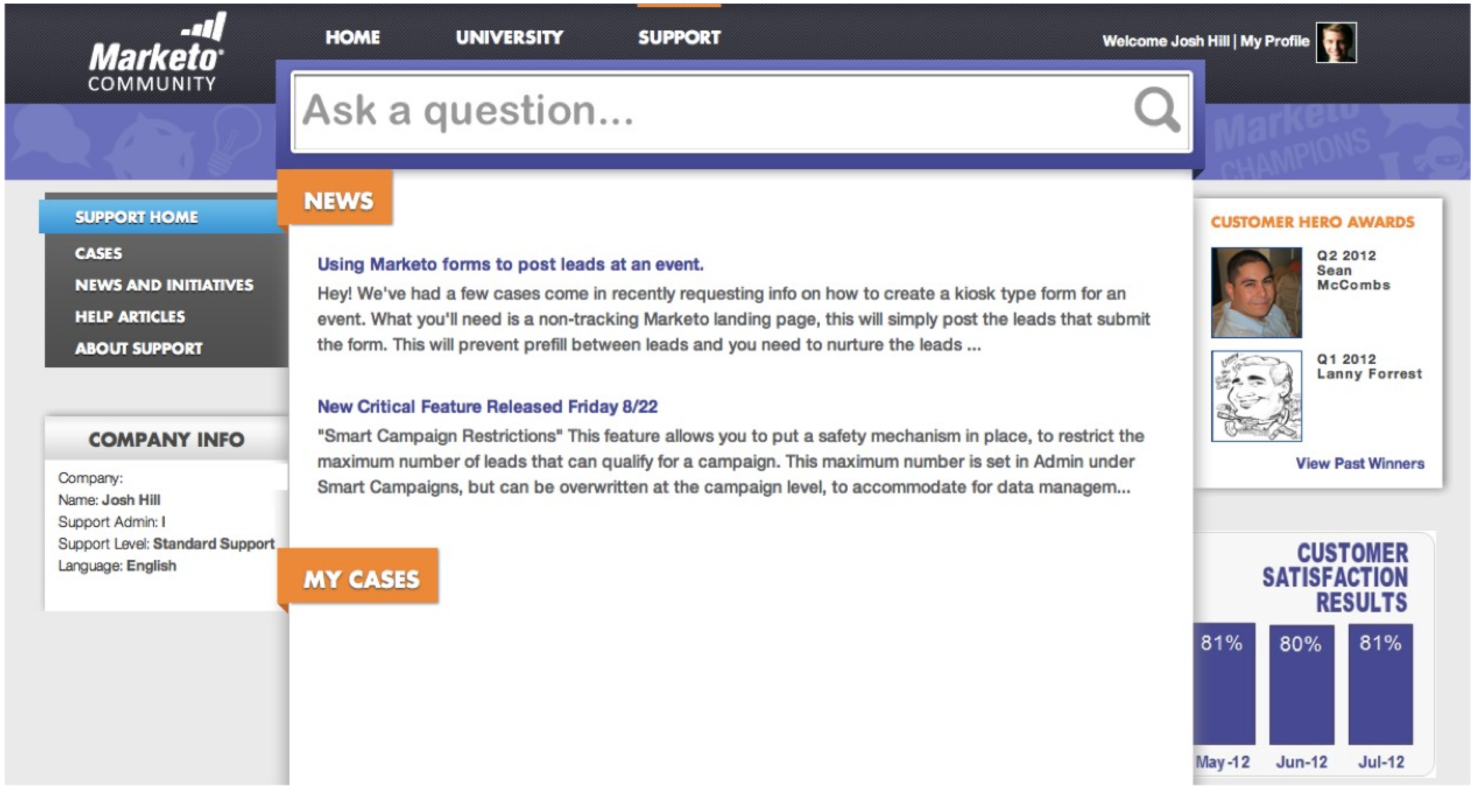
University

This area includes much of Marketo's QuickStart tutorials, webinars, and long form documentation for newer features. I highly recommend using the Basics first, then heading to Advanced Techniques as your use of Marketo increases.



Support

Did you not find what you were looking for? Did something strange happen you cannot fix? Ask Support!



Home

A summary of Support information.

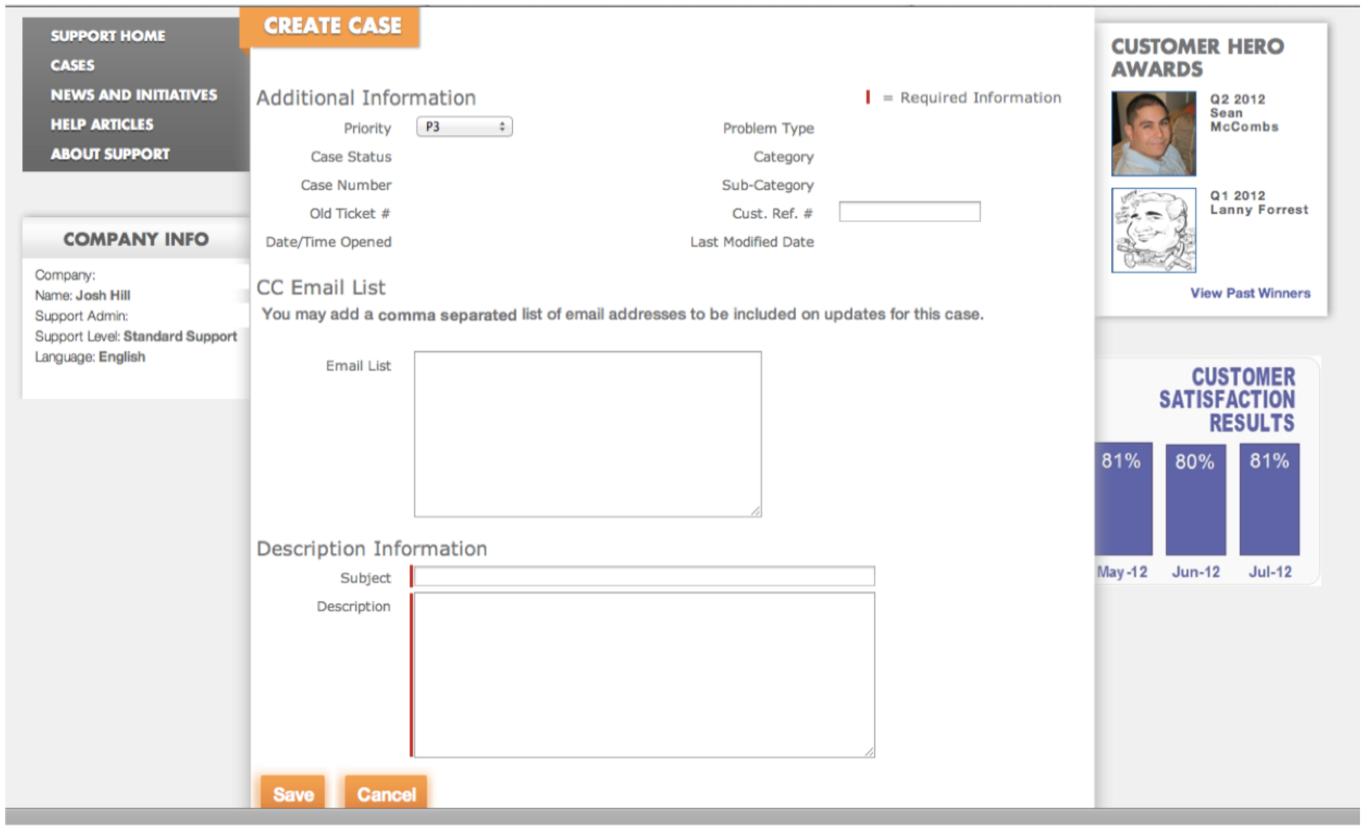
Cases

Manage and create your cases here. Remember, you can manage cases via email and the Community and have all the details appear here.

Support shows you recent News and Open Cases under My Cases. To create a Case

Step 1: Click on Cases to see your list of Cases and Statuses.
You can then `Create a Case`.

Fill in details. Provide names of the assets, Programs, or Campaigns as well as the direct links to the items in question. This will help your Support representative find a solution faster.



Create a Case Using Email

Step 1: Make sure you are listed as a Support contact and Role.
You will see this on the Left side of the screen under "Company Info".

Step 2: Email your question to

`support@marketo.com`

News and Initiatives

A place where Marketo posts common issues and bugs.

Help Articles

A link to the main list of articles.

About Support: contact details and hours.

Contacting Support

Note: register your preferred phone numbers so Marketo can call you back.

You can contact support via the Case system (preferred) or email `support@marketo.com` as long as your email is from a client domain and is approved for Support in Roles. A ticket will be created automatically.

Americas (Portland, OR or San Mateo, CA)

Hours: M-F, 6am to 6pm Pacific
Online: `support.marketo.com`
Email: `support@marketo.com`
Toll Free US: +1.877.270.6586
Direct: +1.650.376.2302

Europe, Middle East, & Africa (Ireland)

Hours: M-F, 8am to 5pm GMT
Online: `support.marketo.com`
Email: `support@marketo.com`
Phone: +353 (0)1 242 3030

Asia Pacific (Sydney, Australia)

Hours: M-F, 9am to 6pm Australia Eastern Time
Online: `support.marketo.com`
Email: `support@marketo.com`
Direct: +1.650.376.2302

Marketo Trust

trust.marketo.com: Quickly view System Status and email deliverability before sending that support email.

Self-Help

Other than using this Guide, there are a few things you can do to stay productive using Marketo.

I also recommend a review of Marketo's own thoughts on support:

- Checklist for Getting the Most from Support.
- Support Webinar
- Webinar Slides and Checklist

What to Check Before Creating a Ticket or Calling Support

Done?	What is Wrong?	Questions to Ask	Comments	Action To Try
☐	Designer not working or does not save.	Did the browser crash? Are you using a supported browser?	Chrome has a known issue with Designer	Close Window, re-open. Switch browsers.
☐	Smart list not saving	Did you click somewhere else too quickly? Check connection.	Be sure to click in the white space after each filter change, wait for the Auto Save to finish before further actions.	Try clicking on a different list or on Marketing Activities, then return to the List.
☐	Smart List did not provide data intended.	Did you use the filters correctly?	Usually caused by incorrect filter use.	Review. Check for IS/IN vs NOT or Was vs. Not Was.
☐	Smart List Count is taking too long.	How many filters did you use?	Complex filter use will take longer.	Try clicking on another list, then clicking back on the smart list. Sometimes the overview page will show a count.

Done?	What is Wrong?	Questions to Ask	Comments	Action To Try
☐	Lead did not sync to SFDC	Is your campaign syncing to SFDC? Does the lead have the required information?	Check affected Leads' history for further detail.	Check affected leads for required SFDC creation details. Check Marketo User for access levels. Check SFDC Sync OK on Admin
☐	Sync Failed! Why? OMG!	Call your Marketo Administrator to review Sync. Did an automated email provide information?	This is a serious error and the system will usually tell you.	Check Sync Status. Reset Sync Credentials Call SFDC Admin to see if something changed.
☐	Landing Page or email looks broken.	Call your designer. Is it something specific?	Usually an html coding error. Be sure your mktEditable tags are there and that your designer used the LP Template Code correctly.	Can you edit the HTML to fix it?

You should also consider the following questions

- Is this an integration error?
- Is this an error on my side of the equation and can Marketo help me better understand it?
- Urgency?

Contacting Support with the Right Details

Before contacting Support, gather together as much of the following as you can:

- ❑ Name of Asset or Campaign
- ❑ Link to an Example Lead or Lead ID/Email
- ❑ What is happening
- ❑ What do you want to happen
- ❑ Counts if data related

- ❑ Business impact and time constraints
- ❑ Contact info – Marketo often has the Administrator’s number, not yours.

Further Networking and Badges

Becoming a Champion

You may see a few profiles that say “Champion” under their picture or elsewhere. These are users who have shown exemplary leadership in the Marketo Community and across the web through helping other users and being brand evangelists. Each summer and winter a new group of up to 50 special users are granted this distinction. Think you meet the criteria? [Join the club]!

My Giant Mug. It fits in my carry on!

User Group Meetings

User Groups are a great way to get involved with fellow marketers and learn from each other. The calendar icon leads to a sign up page with details on [upcoming meetings].

You can also search LinkedIn for your local MUG and learn more about the Group there. I’ve made many contacts through this method so I highly recommend joining a MUG.

Refer a Friend = Free Stuff

You may notice the not so subtle Win an iPad button. If you know of someone who could use Marketo, refer them (with permission) and you can win the latest iPad from Marketo. Pretty cool. *may no longer be available.

My Profile – Your Networking Tool

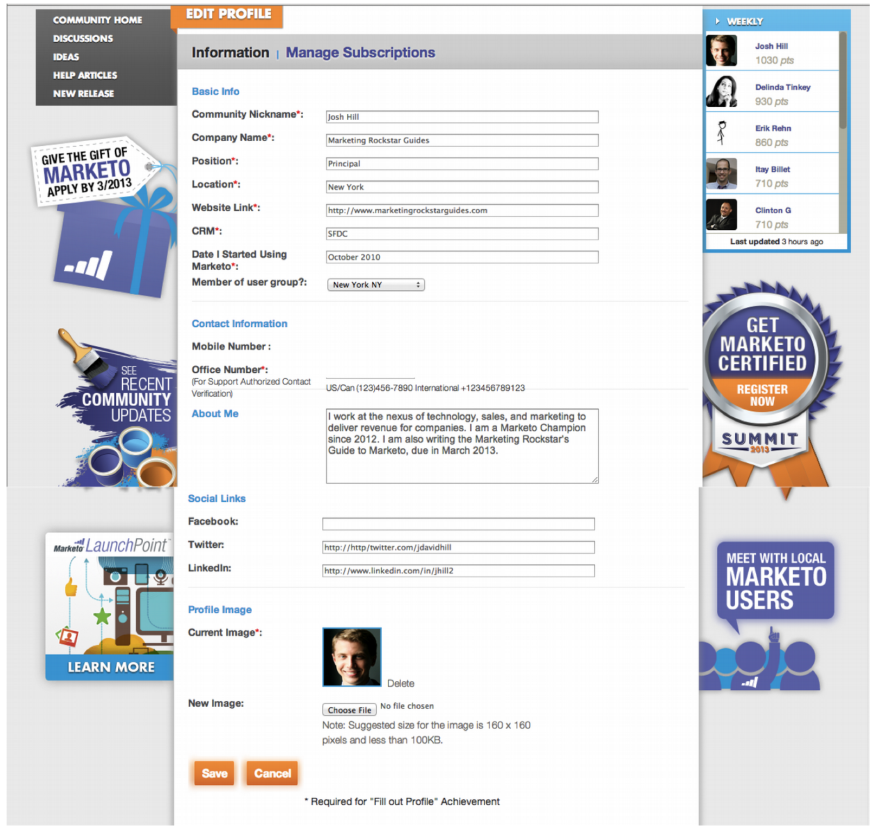
Yet another professional networking tool! Why be anonymous in a closed community of fellow Marketo users? Setup your profile with a picture and contact details. It's up to you, but people are more likely to help profiles with pictures and information. You never know, it could lead to great things.

Step 1: To build your profile, click on My Profile.

Step 2: Click Edit

Add in the details you want.

You should keep these details professional such as work email and LinkedIn with a brief summary of who you are in work life.

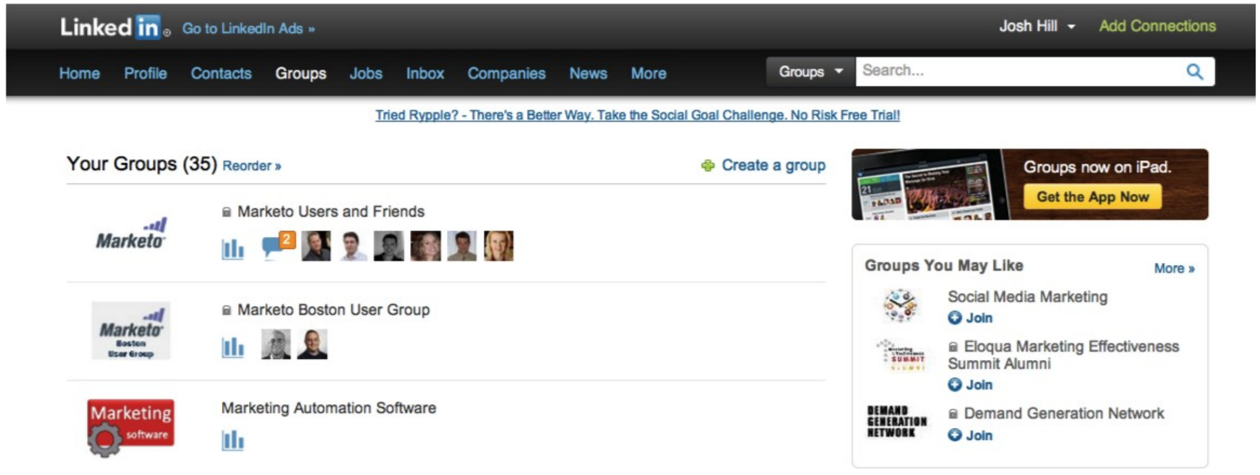


Step 3: Press Save.

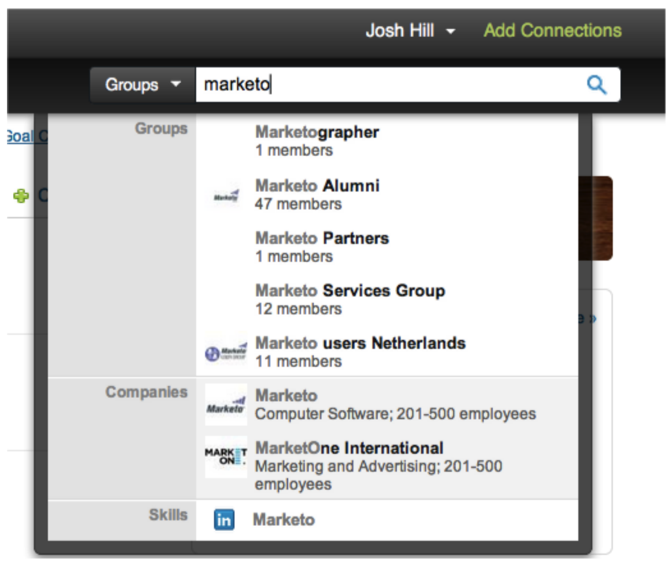
Step 4: You can also Manage Subscriptions for the email address associated with this account.

LinkedIn Groups

There are several LinkedIn Groups dedicated to Marketo Users. The most popular is [Marketo Users and Friends](), which is the main official group run by Marketo. Marketo staffer [Liz Coulter]() is the owner of this group. Introduce yourself!



Definitely join Marketo Users and Friends and then look for your local Marketo User Group (MUG). MUGs are usually by city in North America with groups now popping up in EMEA and soon in Asia. Managers are strict about your location, so be sure to join only the MUG nearest you. There are also special groups by invitation only. Read this Guide and then start helping people…you never know.



Other Groups you might consider joining:

- Marketing Automation Software
- Demand Gen Specialists
- Demand Generation & Marketing Automation Professionals
- Demand Creation Specialists
- Marketing Automation Association
- Marketing Automation Experts
- Marketing Automation Institute is the group for general certification.
- Masters of Marketing Operations
- Salesforce.com Professional Network an informal place for Power Users and Above.
- Golden Rule Marketing. A great place to discuss how automation can treat your clients better.

Chapter Review

Self-Quiz

Where is the best place for advice on using Marketo?

____

When should you call Support *first?*

____

What cool things can you do (or win) on the Marketo Community?

____

____

Recommended Resources

Marketo Documentation

Marketo's own checklist for Getting the Most from Support.

Support Webinar

Webinar Slides and Checklist

Icon Glossary

Tools

Marketo Community

Marketo Support Center

LinkedIn Groups

Experts

Jep Castelein, Marketo

Alex Pelletier

Eric Hollebone

Lead Lizard – Sam Boush

Marketing Rockstar Guides

The Pedowitz Group

Demand Gen

Chapter 7. Sub-Domain Setup

At a Glance

Overview

Choosing a sub-domain name for your Marketo pages to live on as well as a possible email sub-domain are key setup steps which you should take the time to do well. The names you choose now will be around for a long time, especially as search engines and your customers become used to them.

A good sub-domain name should be aligned with your brand name or consistent with its use. If you plan to host news content on your landing pages, perhaps you should choose news.yourdomain.com. If your landing pages are more action oriented, perhaps `go.yoursolutionname.com` is a better choice.

Landing Page Sub-Domain

Marketo Landing Pages for your company live in on Marketo's servers. For your branding to be consistent and to assure people that these pages are from your company, you will want to show a URL with your company's domain name in the address of any pages you create with Marketo.

Required: You need this step to activate your landing pages on Marketo.

REQUIRED: Marketo needs a special sub-domain called a CNAME, which tells the Internet to use `yourname.yourcompany.com` to point to a Marketo server.

If you are using the CNAME for your landing pages, there should be zero effect on your corporate emails. If someone inadvertently sends an email to "`you@cname.domain.com`" it should auto forward to "`you@domain.com`" by default. Please check with your IT team to ensure this is the case for your systems.

The sub-domain you choose should be entirely new and not already in use for other purposes. Your IT team should help you find existing CNAMEs. Fun and effective subdomains could include:

```
go.companyname.com
info.companyname.com
pages.companyname.com
news.companyname.com
email.companyname.com
get.marketingrockstarguides.com
```

How do you add a CNAME to your DNS record?

Please be sure to work with your web team and IT teams to make these changes as they appear deceptively simple, yet deeply affect how people find your site on the internet. Mistakes will cost you. See the original instructions too.

Step 1: Choose a sub-domain name.

Step 2: Speak with your IT Team or Network Administrator

The next step is to speak to your Network Administrator about adding the following to your DNS record. This is relatively simple, but it must be approved.

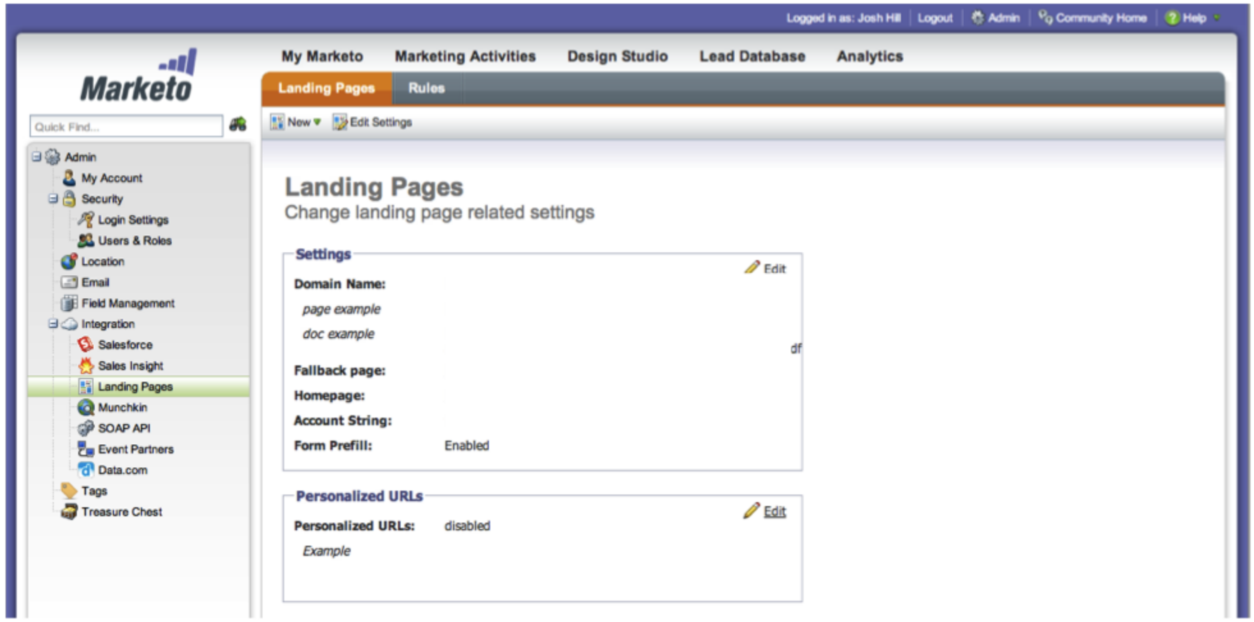
Help your IT team with this code. Please fill in the correct domain names before entering this into your DNS. This is an example only as your web host may use a slightly different method.

```
ADD:
Alias: pages
CNAME: pages.MYDOMAIN.com
POINTS TO: XXX.mktoweb.com
```

Step 3: Step 3: Login to Marketo.

Go to `Marketo>Admin>Landing Page Settings>Account String` and then enter in the following details:

```
Domain Name: pages.MYDOMAIN.com
Domain Alias: pages
Fallback page: http://www.MYDOMAIN.com
Home Page: http://www.MYDOMAIN.com
Account String: XXXX
```
←this is usually your domain without ".com"



If you have questions, see the [Marketo documentation](#).

How do you change your CNAME on Marketo?

If your firm merges with another Marketo user or you decide the sub-domain is not working for your brand, you can easily change it with [these instructions](#).

Short answer: go through the steps above to add the new CNAME, then change the CNAME in Marketo. Test it. Remove the old CNAME or setup a 301 redirect using the URL Tools if you are concerned about SEO/SERP.

Longer Answer: This should work well and fairly quickly. Be warned that making this change could affect your Google Analytics results. Marketo should work fine and no data will be lost. Again, make sure you understand the SEO/SERP implications before making the change.

You will have to update any `Visit(ed) Pages` filters or triggers to update URLs that used the old CNAME. If you used a Page Name pointer instead, there is nothing to change.

Email Sub-domains and Authentication

One of the reasons you selected Marketo was its ability to send targeted emails to your existing database. To do that well, and adhere to local laws, CANSPAM, and your firm's privacy policies, requires careful setup at the start. Even if you have been using Marketo for years, doing this process now will certainly improve your deliverability rates.

Authentication Methods

There are two common methods of telling other mail servers that Marketo's servers are authorized senders of your email. These two methods are SPF and DKIM.

The Sender Policy Framework validation system verifies that your email is from a server you authorized. Having the SPF code in your DNS record helps to assure other mail servers your mail is coming from you.

DKIM is short for DomainKeys Identified Mail (pronounced "Dee Kim"). DKIM adds a special code to each email helping target mail servers verify the message came from a server you authorized. Yahoo, Gmail, and AOL rely on SPF and DKIM as part of their spam filtering process. Stay on their good side and use DKIM.

Please speak with your IT team to implement these important reputation tools, which will increase deliverability, opens, clicks, and your pipeline. You should discuss the benefits of enhanced email reputation on the main email servers. Remind your IT team that simple steps like this add up to real dollars later. They should be able to review the impact on other systems. Be prepared to wait while they ensure these changes are made properly.

Warning: if your own product is sending email on behalf of clients, SPF/DKIM will require detailed setup.

IMPORTANT: When your technology team completes the changes, call Marketo to ask them to add SPF/DKIM to your IP. Otherwise, other email servers will still see Marketo as an unverified sender for your domain.

Step 1: SPF Setup

If your system has been in place awhile, see if you already have an SPF record.

No SPF Record: If you do not have an existing SPF record, add this line to your DNS Record using the command:

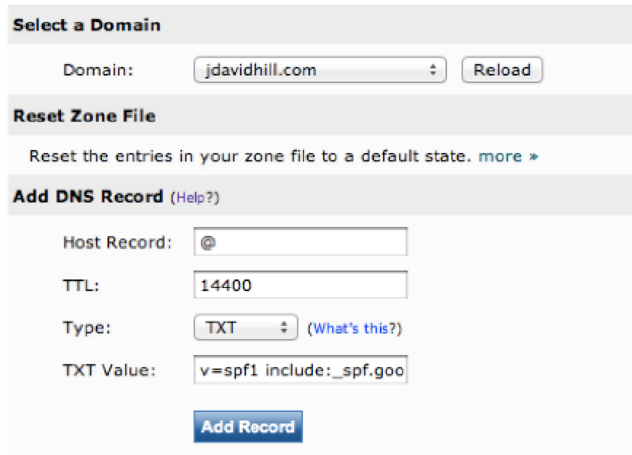
```
yourdomain.com IN TXT v=spf1 mx ip4[your-corp-email-IP]
include:mktomail.com ~all
```

A more likely scenario is having to enter it in a web hosting service's dialog box. Let's go through those steps. To add an SPF record to your host, do the following:

Host Record: `@`

Text Line: `v=spf1 include:mktomail.com ~all`
Note the spaces are required.

Add this line for each subdomain you intend to email from. Technically, just "domain.com" will work for all other subdomains below it, but you should be very clear on your DNS.



Step 2: Setup DKIM

DKIM setup requires a simple TXT record in your DNS record. Ask your IT team to insert the following into your DNS record.

The original Marketo instructions are available online. You can also go straight to the DKIM text file. Copy this code ***exactly*** as shown here.

Host Record: `M1._domainkey.yourdomain.com`

Caution: this key should be on a single line as is.

```
Value:
v=DKIM1;
k=rsa;p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQDFUlNZvtGDlIGDRtzyRQydM9yRInD5YMx86QpgZ3v7pT+Mx4tGbjUxY41TXbsp
7UH9hTREaKKGQKNM/B3FzcFVv4zafZ09lUaXcbSdtD70iXyH0OXEGXLZI5gG0ZwjK5ptgQ18d+pUP9s8xMkJnZlubTk9MLvQnv3ZBzoL9FHF
DQIDAQAB
```

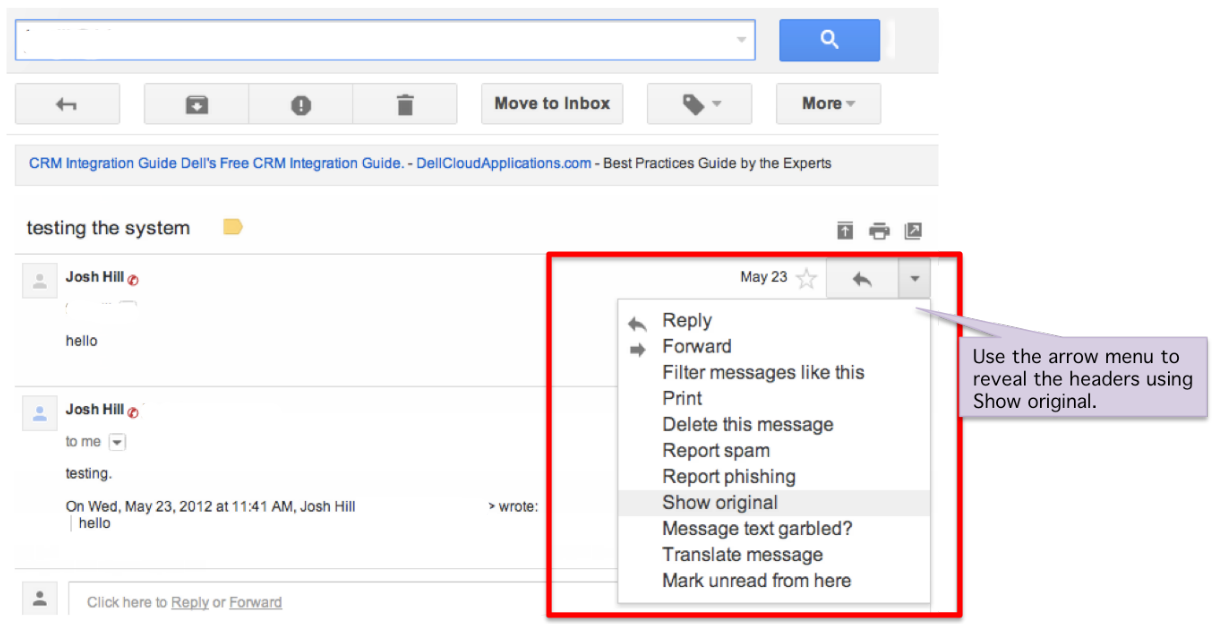
Example:

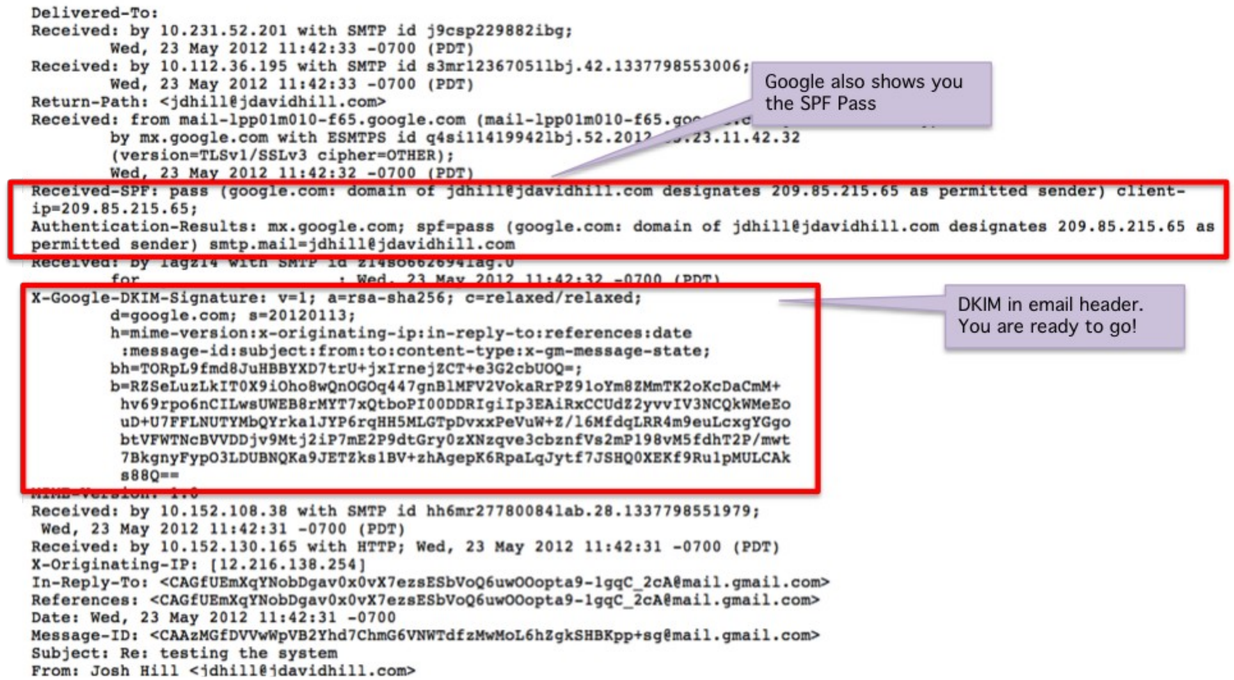
TXT Host Record Name	Value (you may not need the quotes).
google._domainkey	"v=DKIM1; k=rsa; p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCOZ8IXZJKniAQ1s8ZpjwbIZ9EQ/rgzU21cvah4iOvBVmmLFGmMUtwNUaOJEyuFb6dNp6k6DOzy0nz7gq7LDHUxNy/2zdrH/XrQYuOgmuYETj25k8N/lnEV4xKovyr4O8b5L8aEBgQ0cpzspwqpf2hv3+df+CHrgTeS37lVaf69VQIDAQAB"

Step 3: Verify DKIM and SPF with free tools

Verifying that the insertions are correct can take from 10 minutes to 48 hours as the DNS servers propagate the updates across the internet.

DKIM Test: the best way to test DKIM is to send an email from Marketo using the Send Email function to just your email address. It's best to use a Gmail.com address.





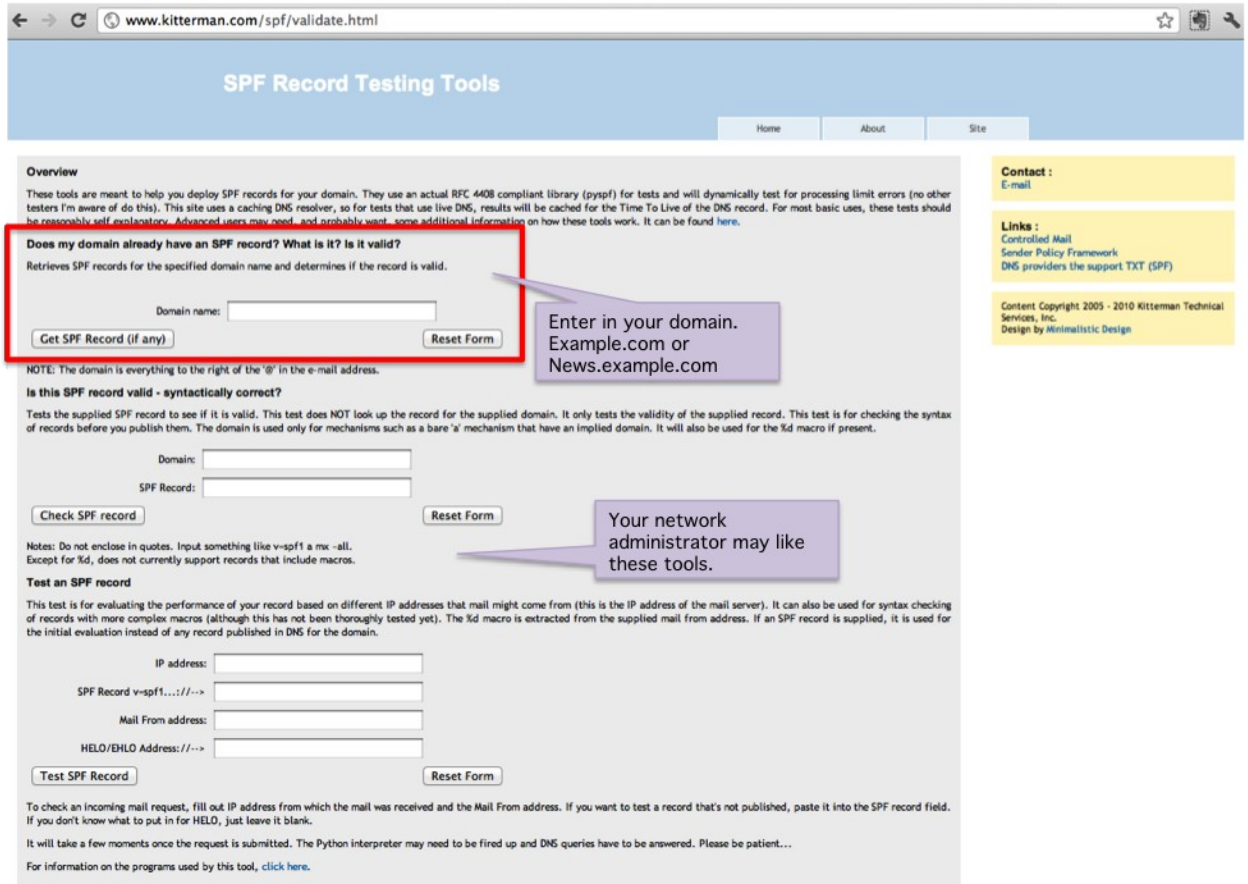

```
Delivered-To:
Received: by 10.231.52.201 with SMTP id j9csp229882ibg;
        Wed, 23 May 2012 11:42:33 -0700 (PDT)
Received: by 10.112.36.195 with SMTP id s3mr1236705llbj.42.1337798553006;
        Wed, 23 May 2012 11:42:33 -0700 (PDT)
Return-Path: <jdhill@jdavidhill.com>
Received: from mail-lpp01m010-f65.google.com (mail-lpp01m010-f65.goo
        by mx.google.com with ESMTPS id q4si114199421bj.52.2012
        (version=TLSv1/SSLv3 cipher=OTHER);
        Wed, 23 May 2012 11:42:32 -0700 (PDT)
Received-SPF: pass (google.com: domain of jdhill@jdavidhill.com designates 209.85.215.65 as permitted sender) client-ip=209.85.215.65;
Authentication-Results: mx.google.com; spf=pass (google.com: domain of jdhill@jdavidhill.com designates 209.85.215.65 as permitted sender) smtp.mail=jdhill@jdavidhill.com
X-Google-DKIM-Signature: v=1; a=rsa-sha256; c=relaxed/relaxed;
        d=google.com; s=20120113;
        h=mime-version:x-originating-ip:in-reply-to:references:date
         :message-id:subject:from:to:content-type:x-gm-message-state;
        bh=TORpL9fmd8JuHBBYXD7trU+jxIrnejZCT+e3G2cbUOQ=;
        b=RZSeLuzLkIT0X9iOho8wQnOGOq447gnBlMFV2VokaRrPZ91oYm8ZMmTK2oKcDaCmM+
         hv69rpo6nCILwsUWEB8rMYT7xQtboPI00DDRIgiIp3EAiRxCCUdZ2yvvIV3NCQkWMeEo
         uD+U7FFLNUTYMbQYrka1JYP6rqHH5MLGTpDvxxPeVuW+Z/16MfdqLRR4m9euLcxgYGgo
         btVFWTNcBVVDDjv9Mtj2iP7mE2P9dtGry0zXNzqve3cbznfVs2mP198vM5fdhT2P/mwt
         7BkgnyFypO3LDUBNQKa9JETZks1BV+zhAgepK6RpaLqJytf7JSHQ0XEKf9Ru1pMULCAk
         s88Q==
Received: by 10.152.108.38 with SMTP id hh6mr27780084lab.28.1337798551979;
 Wed, 23 May 2012 11:42:31 -0700 (PDT)
Received: by 10.152.130.165 with HTTP; Wed, 23 May 2012 11:42:31 -0700 (PDT)
X-Originating-IP: [12.216.138.254]
In-Reply-To: <CAGfUEmXqYNobDgav0x0vX7ezsESbVoQ6uwOOopta9-1gqC_2cA@mail.gmail.com>
References: <CAGfUEmXqYNobDgav0x0vX7ezsESbVoQ6uwOOopta9-1gqC_2cA@mail.gmail.com>
Date: Wed, 23 May 2012 11:42:31 -0700
Message-ID: <CAAzMGfDVVwWpVB2Yhd7ChmG6VNWTdfzMwMoL6hZgkSHBKpp+sg@mail.gmail.com>
Subject: Re: testing the system
From: Josh Hill <jdhill@jdavidhill.com>
```

Figure 1. Email Header with SPF and DKIM verified.

Step 4: Verifying SPF

To test your SPF record, you can use one of two tools.

1. [Kitterman's Quick Tool]


www.kitterman.com/spf/validate.html
SPF Record Testing Tools
Home
About
Site
Overview
Does my domain already have an SPF record? What is it? Is it valid?
Retrieves SPF records for the specified domain name and determines if the record is valid.
Domain name:
Get SPF Record (if any)
Reset Form
Enter in your domain. Example.com or News.example.com
NOTE: The domain is everything to the right of the '@' in the e-mail address.
Is this SPF record valid - syntactically correct?
Domain:
SPF Record:
Check SPF record
Reset Form
Your network administrator may like these tools.
Test an SPF record
IP address:
Mail From address:
Test SPF Record
Reset Form
Contact :
E-mail
Links :
Controlled Mail
Sender Policy Framework

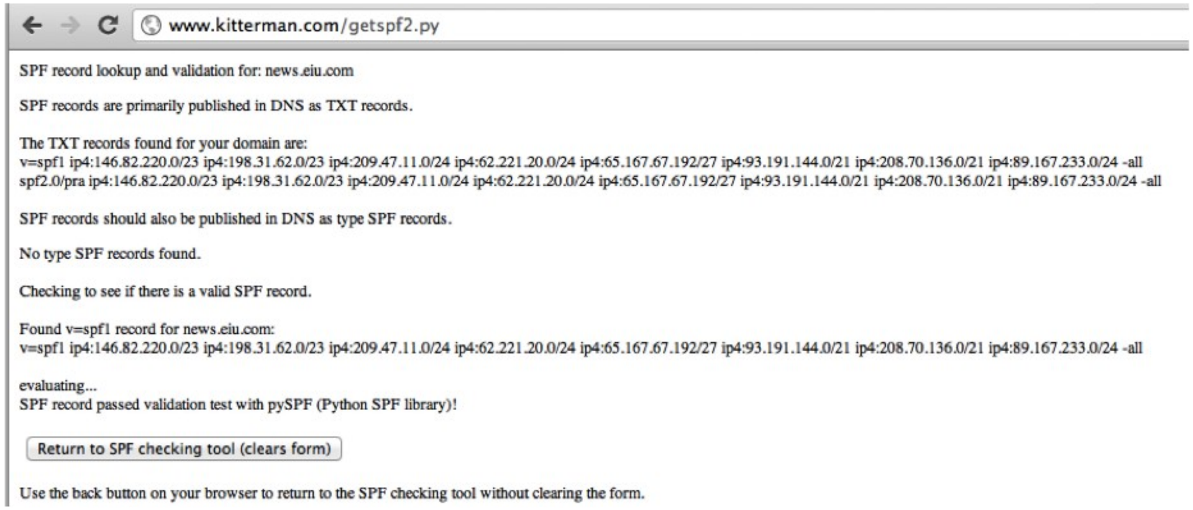
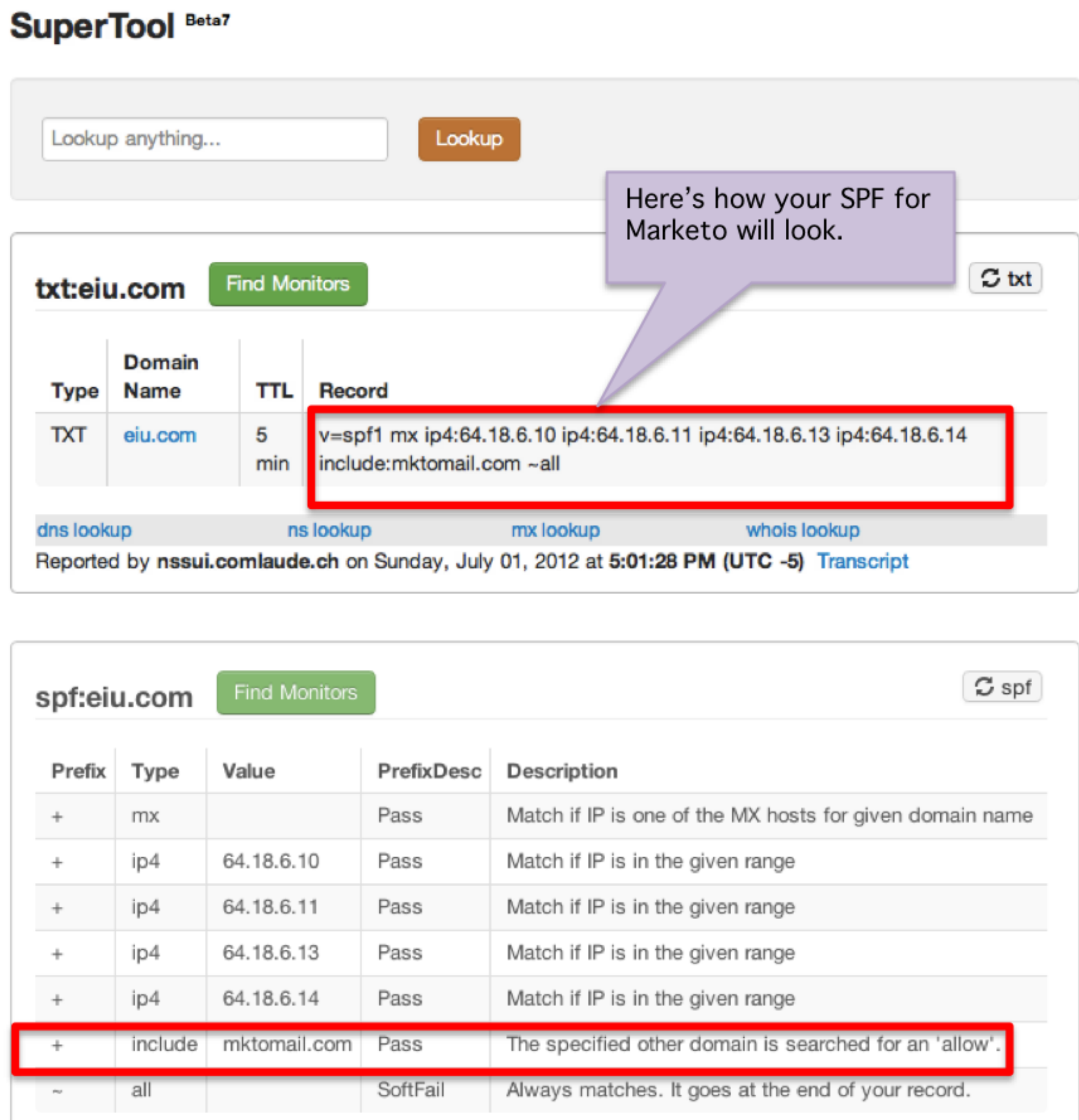
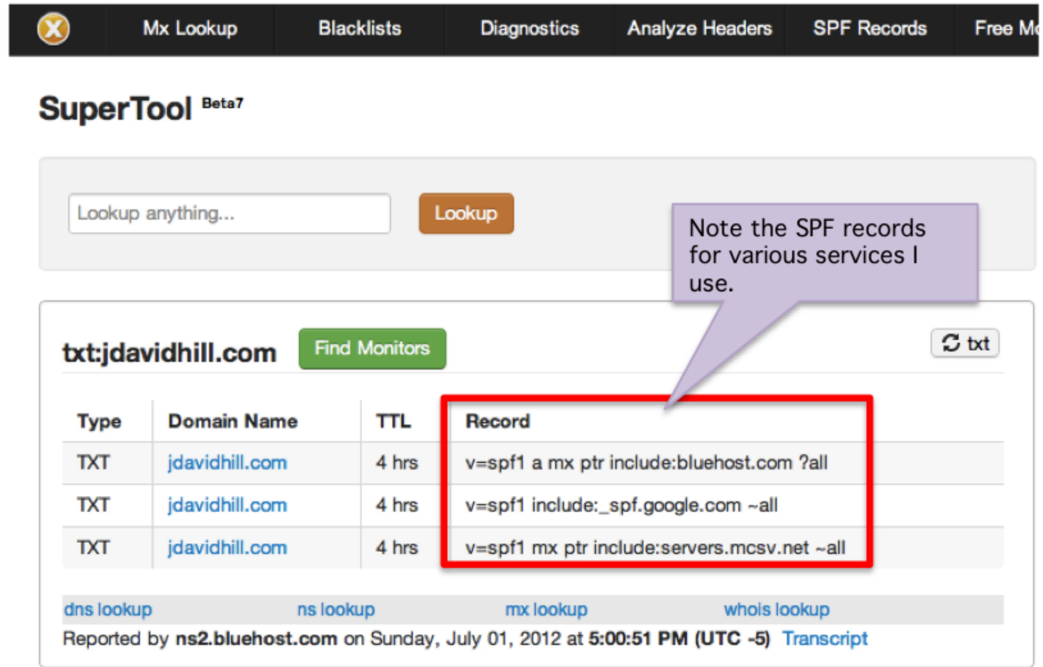


Figure 2. A successful SPF test.

2. MXToolBox. This allows you to view DNS record details in different ways. Here's how your record might look with Marketo's SPF included:



Look what fun things happened when I used my domain with jdavidhill.com in the lookup box.



Step 5: Create a Marketo Support Ticket

Marketo needs to know you have established the DKIM and SPF records so they can crosscheck as well as submit the SPF record to whitelists. Be sure to ask them to add you to the Yahoo and Hotmail lists.

Step 6: Pro-Tip: Optional Step for Multiple Email Sub-Domains

You can have one or more sub-domains (CNAMES) for your marketing email. This is particularly useful if you plan to use a dedicated IP to manage your own reputation. I recommend speaking in detail about this with your IT team because corporate email servers will need some configuration so that email boxes can be handled using the new sub-domain.

For instance `josh@jdavidhill.com` may not be the same as `josh@news.jdavidhill.com`. I recommend that such a map be a forward or a proxy email box someone on your team can check for bounce backs, unsubscribes, and replies.

SPF is easy: `include:mktomail.com ~all` to each sub-domain's record.

For DKIM, you will need to add the same key to your sub-domain's DNS record:

```
M1._domainkey.sub-domain.yourdomain.com

k=rsa;p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQDFUlNZvtGDlIGDRtzyRQydM
9yRInD5YMx86QpgZ3v7pT+Mx4tGbjUxY41TXbsp7UH9hTREaKKGQKNM/B3FzcFVv4zafZ
09lUaXcbSdtD70iXyH0OXEGXLZI5gG0ZwjK5ptgQ18d+pUP9s8xMkJnZlubTk9MLvQnv3
ZBzoL9FHFDQIDAQAB
```

Branded Tracking Links

Branded tracking links are a neat way to shorten email and landing page links while still allowing Marketo to track a Lead's behavior. Branding the tracking link also helps reassure your target audience that the links in your emails are legitimate. Branded links which use your domain in the URL may help your emails get through spam filters.

So instead of `http://mkto-x####.com/track?type=click&enid=(really-long-string)`

You would have `http://go.yourdomain.com?etc`, which is much nicer looking and offers the email reader some reassurance they are going to the right place.

Step 1: Select a Sub-Domain just for tracking

Marketo recommends you use a name that is simple and avoids any indications it is a tracking domain. For instance, do not use something like `tracking-you.mydomain.com`. You will receive very few click-throughs on that email!

Most firms choose `go` or `t` or `mkt`. Use something short.

Step 2: Find Your Marketo Tracking Domain

You may have to ask Marketo for your tracking domain or look at a Marketo email you sent to your own email. Your tracking domain will look similar to this: `mkto.a0244.com`

Step 3: Add the CNAME to your DNS Record

You can ask your IT team to do this. The following insertion can be done with this code: (example only)

```
mkt.yourdomain.com IN CNAME mkto-a0244.com
```

Step 4: Contact Marketo Support

Create a support ticket to ask Marketo to add your sub-domain to be used instead of the generic Marketo domain.

Step 5: Test

Once Marketo confirms the update on their side of the system, you should send your internal team a test message with three links you know to be valid. Use both text and html versions so you can look at the actual URL.

Your Guide: Keeping Track of Sub Domain Technical Details

Use this table to include your organization's details for future reference.

Purpose	Sub-Domain	Current IP	Shut Down Date	Activation Date	New IP

Chapter Review

Self-Quiz

Is DKIM and SPF enough to improve your email reputation?

____

How does DKIM authenticate your email messages from Marketo?

____

Why should you setup a tracking sub-domain?

____

____

Recommended Resources

Marketo Documentation Marketo

[Updated Technical Startup Guide]()

[Marketo's Ultimate Deliverability slides]()

[Marketo's Email Deliverability Guide]()

[Marketo DKIM Instructions]()

Marketo DKIM Text File

Changing Your CNAME

Using Multiple Sub-domains with Marketo (not recommended)

Tools

DKIM Details for the technically inclined

MX Toolbox

Kitterman's SPF Tester

DNS Queries

Experts

Eric Hollebone's SFP-DKIM Setup Guide. This short guide offers fantastic technical detail that your network administrator will love.

Chapter 8. Administering Marketo

At a Glance

Overview

This section is for Administrators. If you are not an Administrator on your Marketo instance, you can skip this section.

As the Administrator, you have the power to do anything, including grant new users access. Use this power wisely, especially if you are new to being an Admin. Understanding how Roles and Users work together is important to maintaining the security and integrity of your database.

Why is security important?

If you have a Creative vendor, perhaps you want to let them upload HTML code. But do you really want them to have access to your valuable contact database? Do you really want the new guy or your intern to have the power to delete campaigns or data? No, you don't. So assign them to a limited role until you are comfortable with their skills.

Understand Marketo Better

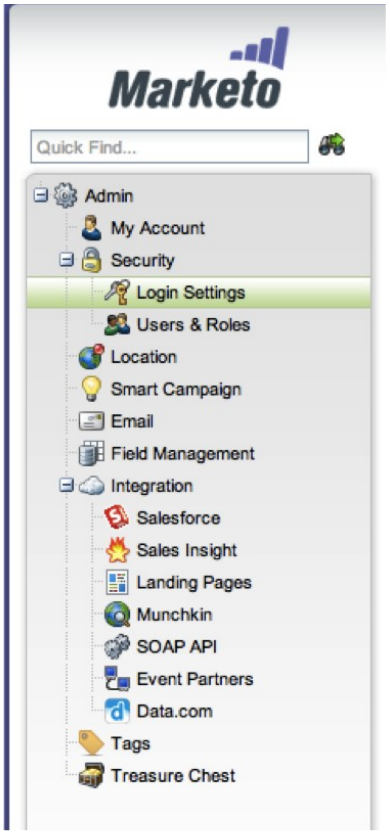
As an Admin, you will be charged with fixing things should they go wrong or adjusting system wide settings. Walking through the Admin tools will help you understand why things in Marketo work the way they do.

Review of the Admin Section

Let's become familiar with the Admin module. Once you click on the upper right button Admin, you will see a tree like this one.

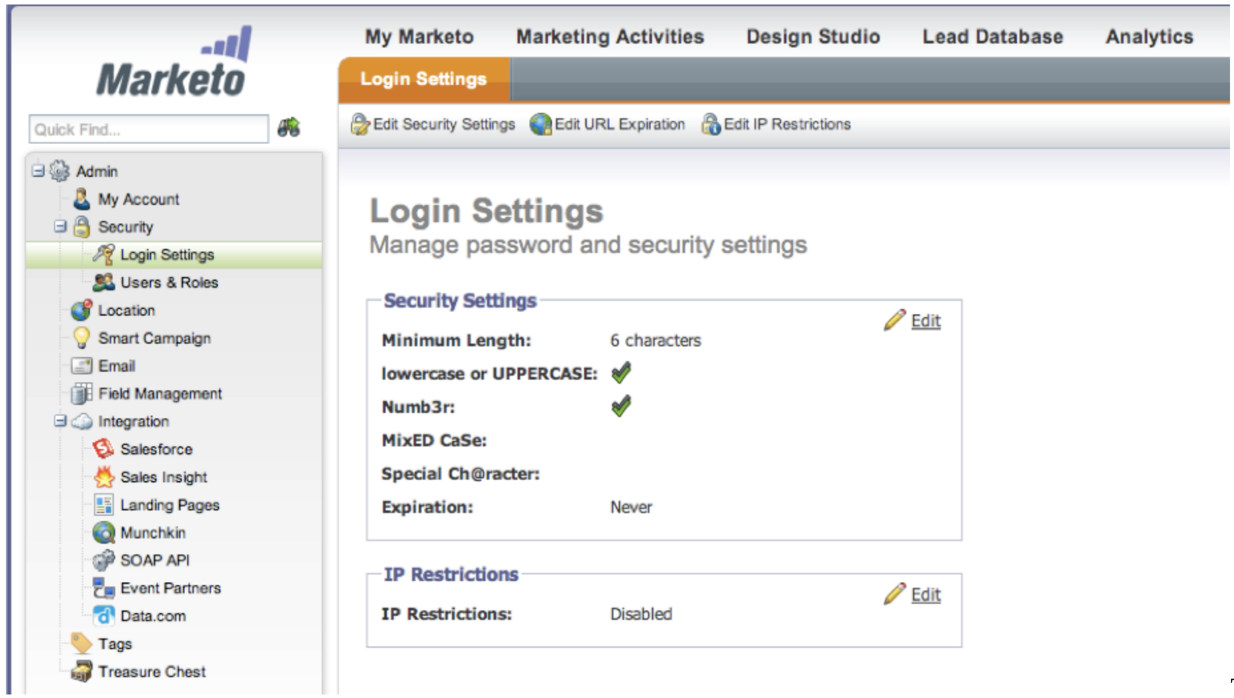
- **My Account**: change your password or username/email.
- **Login Settings**: system wide login constraints.
- **Users & Roles**: User setup and Role Setup; delete or create users.
- **Location**: your instance's system time.
- **Smart Campaign**: restrict campaigns over a certain number of leads.
- **Email**: email defaults for entire system; default unsubscribe footer.
- **Field Management**: manage fields and create custom fields: experts only.
- **Salesforce**: adjust SFDC sync options and user.
- **Sales Insight**: turn on SI.
- **Landing Pages**: CNAME and other defaults.

- **Munchkin**: code for your website to track users.
- **SOAP API**: security token.
- **Event Partners**: add usernames for webinar providers.
- **Data.com**: enter in Jigsaw.com username.
- **Tags**: manage custom Program channels.
- **Webhooks**: manage third party connections.
- **Treasure Chest**: beta test new features.



You may not see every setting depending on Treasure Chest or your licensed instance. Before you begin the sync with Salesforce, you will want to login to Marketo, then go to `Admin> Users & Roles` to secure your instance and then assign users.

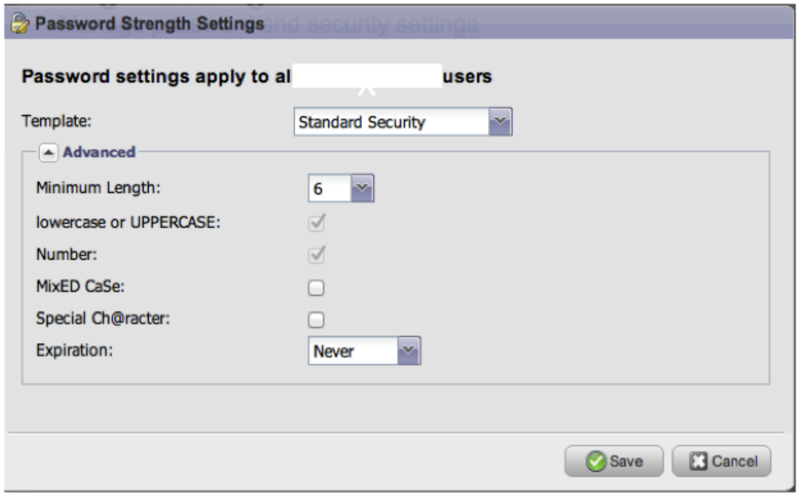
Login Settings



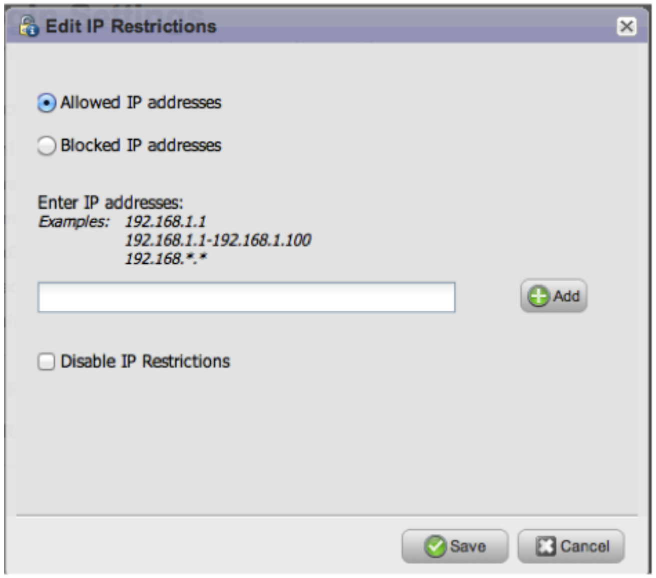
These indicate the system settings for all users.

The defaults are ok, however, if your firm has minimum standards on passwords, you should use those. I recommend:

- Minimum Length: 8 characters since this is more common now
- Lower or Uppercase = True (can have either)
- Numb3r = True (must have at least one number)
- MiXed CaSe = True (must have at least one lowercase and one uppercase letter)
- Special Ch@racter = True (can use !# etc)
- Expiration = 6 months or less



I know the expiration is often Never, however, consider doing this as often as your network password changes to help prevent breaches from spilling over to Marketo or to prevent past employees from gaining access later on.

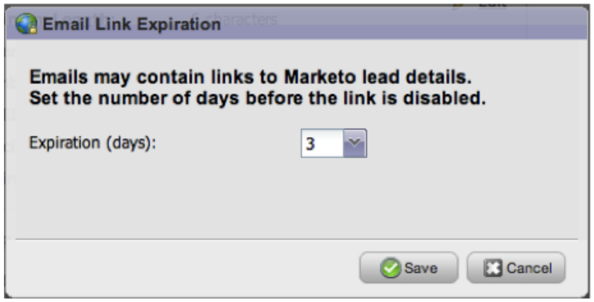


`IP Restrictions` – restrict access by IP address to limit potential issues. (allowed, blocked)

`Allow` = grant access to specific IPs or ranges

`Block` = block any access to the system from specific IPs

Unless you are forcing use of VPNs for all work by remote users, restricting IP access is unnecessary. If your network team asks you to restrict access to certain IPs that can be helpful if a hacker is attempting to gain access.



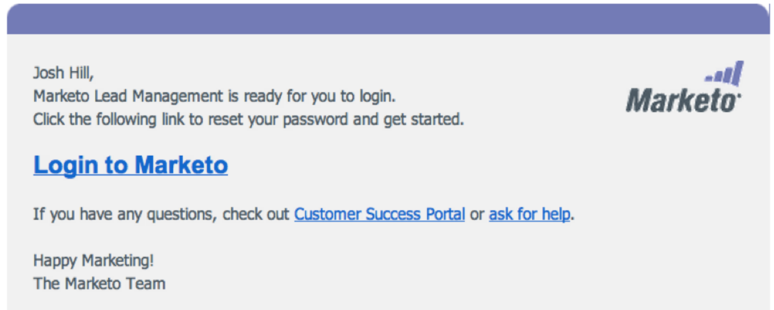
Email Link Expiration lets you expire direct links to lead data in Marketo; these are links generated by Marketo.

Users & Roles

Roles are the only way to control access each user has to different parts of the system. For the sake of this chapter, we assume you have 1 Workspace and 1 Partition.

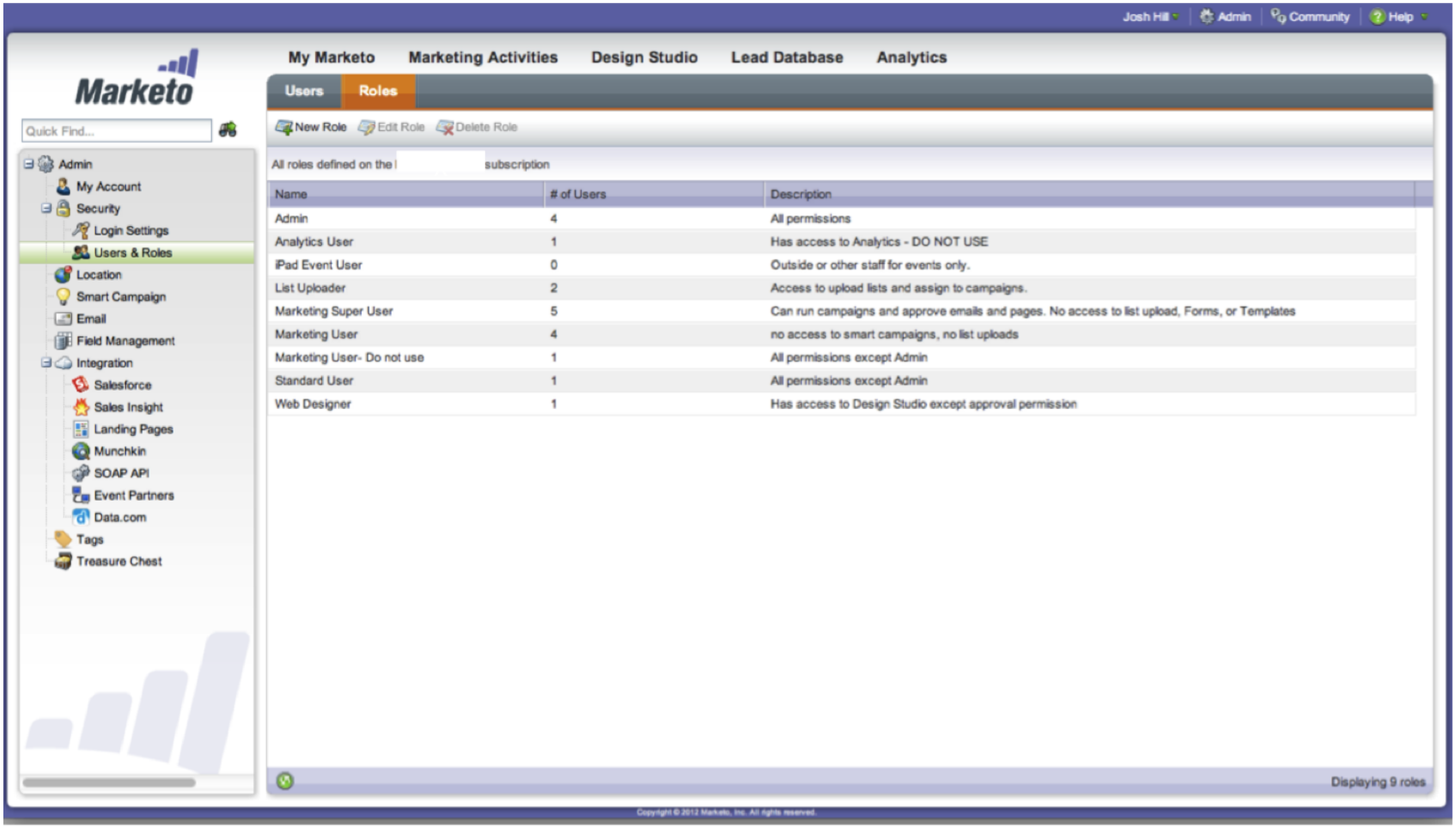
Default Roles

When you first sign with Marketo, Customer Enablement will send you a new username invitation; you will be assigned the Admin Role will full permissions. Logging in will require you to reset your password, and then you are free to begin.



The default Roles are:

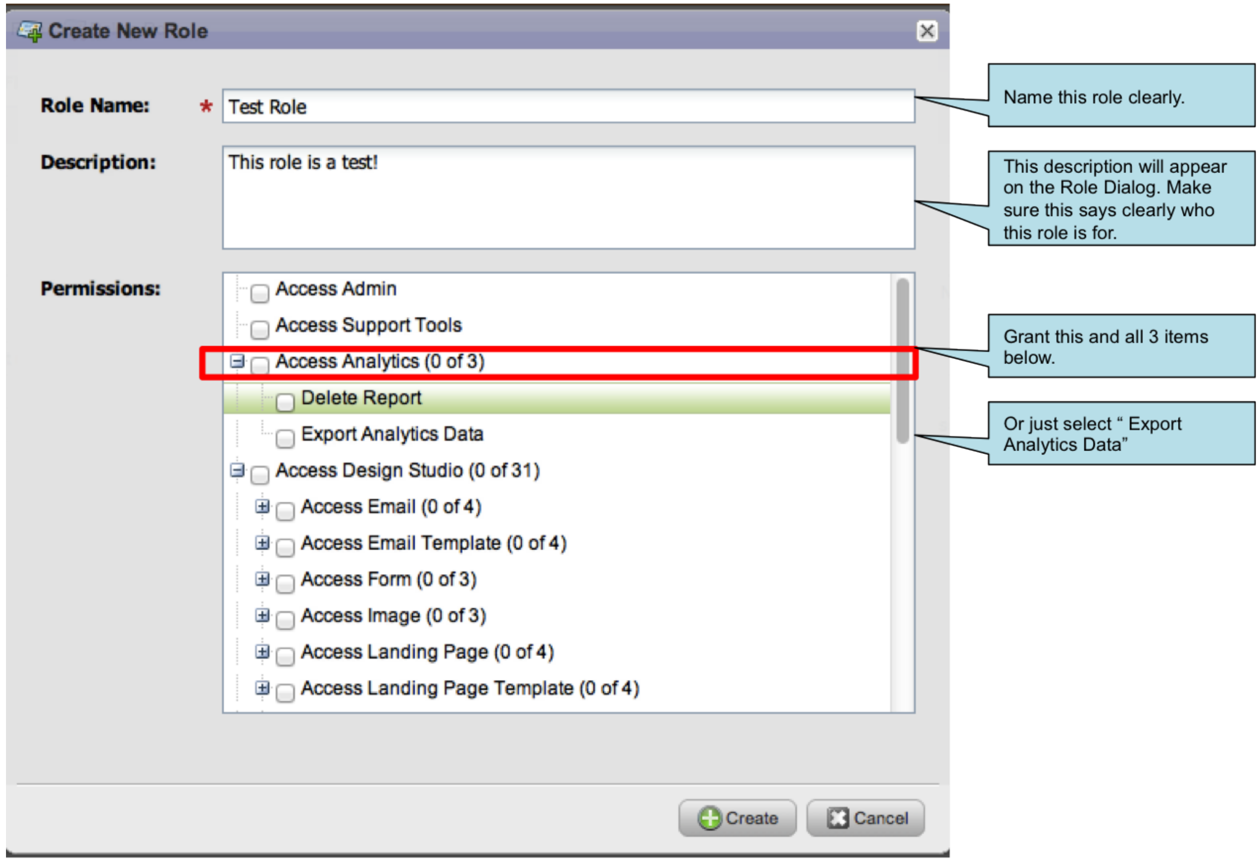
- Admin
- Standard User (all but Admin)
- Marketing User (all but Admin)
- Web Designer (Design Studio only)
- Analytics User (Analytics only)



A Role determines the level of access you grant to a User. You can also create new Roles, as your business requires. I highly recommend reviewing the Roles and User assignments every few months or after your team changes. While you can keep the defaults, I find that Standard and Marketing User are too lax as is Web Designer.

The Role – Access Hierarchy

Click on the Marketing User role to view its access permissions.



This is an access hierarchy where checking a section header grants access to lower level tools. Thus, if you want to restrict or grant access to certain functions, you need to click the plus (+) icon to go deeper.

Users with this Role have only access to functions that are explicitly checked.

Suggested Roles

In my experience, the following Roles are good starting points for most businesses. Set these up first, before assigning users.

Role Name	Access Level	Assign to This Kind of Person
Admin	Admin, default	CRM Administrator, Power Marketer or lead marketing automation person.
Marketing User - Limited	Do not use the default Marketing User Restrict certain things like list uploads, Forms, Templates	Associates, Interns
Designer	Design Studio Program Emails	Web designer, graphic designer, external vendor. Consider restricting approvals
Marketing Super User	Run campaigns, approve assets	Marketing Managers, Marketing Operations Limit list uploads, Forms, Templates
List Uploader	Limited to importing lists and running campaign flow actions.	If you have a database manager who does this for everyone, use this.

If you need to adjust these Roles or create new ones later, you can do so anytime. Remember, if you are tempted to assign multiple Roles to a user, then you need to re-evaluate your Role settings.

Users

Assigning a Role to a User

Best Practice: Users can be assigned to only *one* Role at a time.

When you create a new user, you will assign this user to a Role. **Please select one Role per person**. There is no reason to add more than one, as it will create a security hole.

User Management

Create a New User

Step 1: Press Invite New User and enter in the appropriate details.

For the email address, be certain it is entered correctly. If you are hiring a consultant, ask them which username they prefer as they often have multiple accounts with Marketo. You can have only one account per email address. If you work with multiple systems use this format:

`clientname@yourcompany.com`

to distinguish accounts easily.

Step 2: Select ONE Role.

Edit the invitation if desired.

The person will then receive a link to login and change their password. If the user does not use this link within 7 days, their registration expires and you will need to invite them again.

Re-inviting a User

Users may miss the invitation email because it can end up in Spam. Sometimes people are on vacation or an executive will never login. If the user still needs access, do this:

Step 1: Select the User

Step 2: Press Re-invite

You may need to instead `Delete` and `Create New` for the user.

Deleting a User

Do this when you are certain you wish to remove a user entirely.

Step 1: Select the User

Step 2: Press Delete User

Inactivating a User

If for some reason you want to keep a username available, but inactivate them, you can uncheck their Role so they can no longer act within the system.

I highly recommend deleting a user if there is no chance they are returning to use the system.

Changing a User's Roles

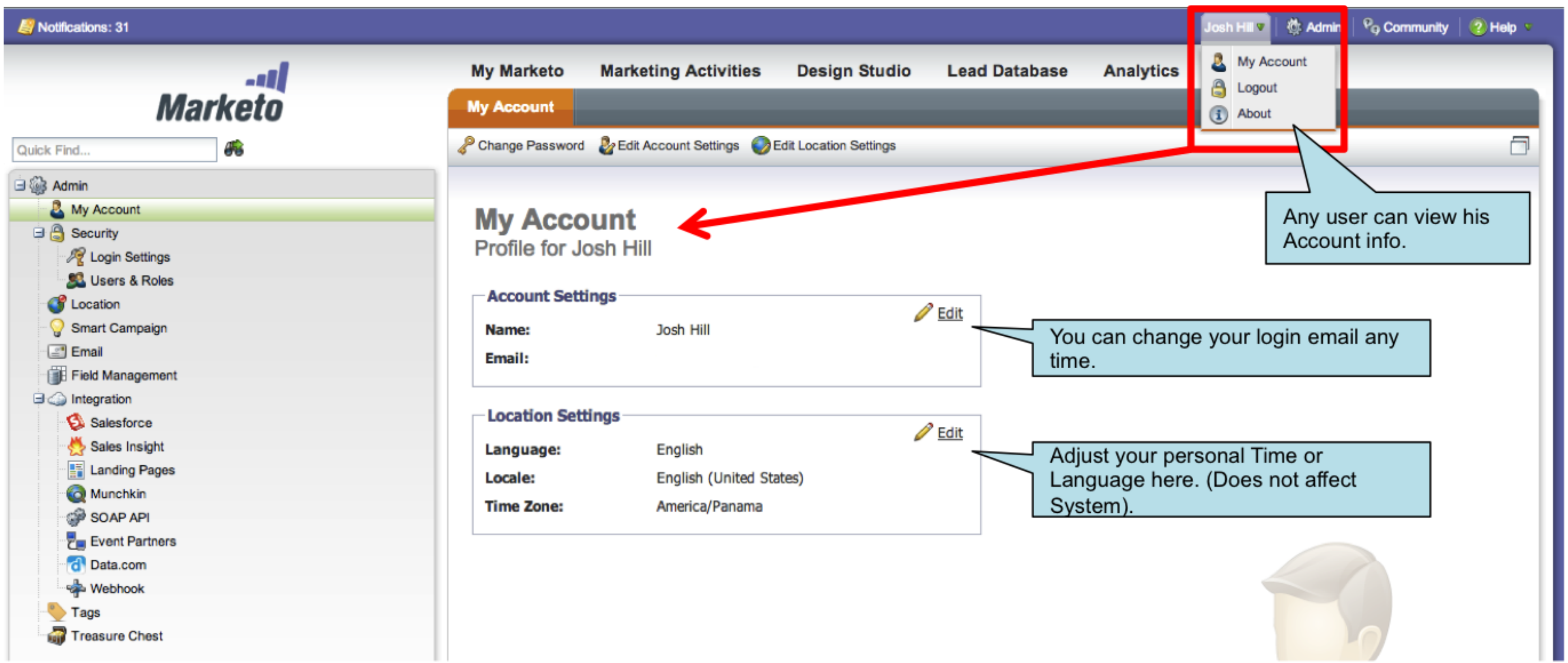
Step 1: Select the user.

Step 2: Press Edit User.

Step 3: Check the new Role you want.

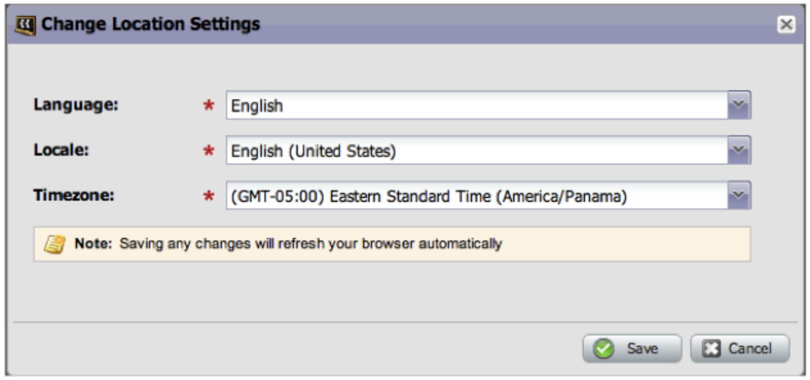
My Account

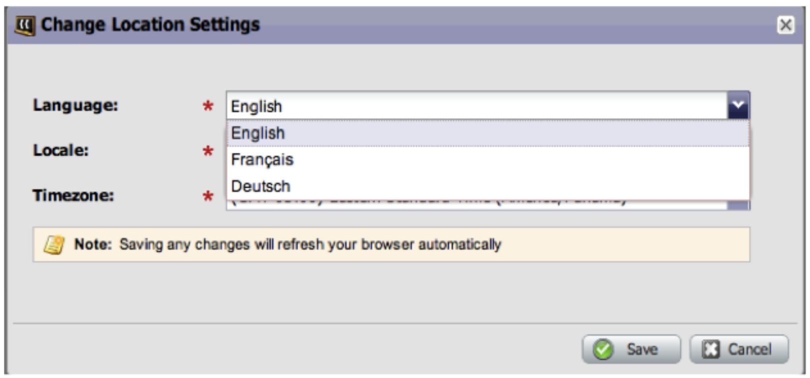
Each user can access their account preferences regardless of the security settings. Of course, they will be limited in many cases to a few changes.



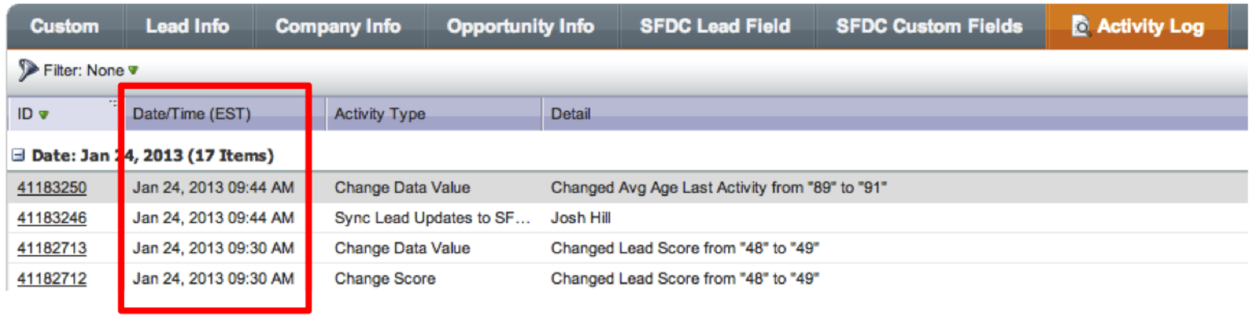
User Language and Time Zone

As of January 2013, all users may select their preferred time zone and choose from 3 system languages: English, French, and German.





The User Time Zone *does not affect* the System Wide Time Zone you selected in Location. The User Time Zone simply displays the person's local time on *all screens and with all data*. If your personal time zone is different than the system time, you will see all Activities and Send Times in *your* time zone.



Tracking Authorized Users

Use this handy table to keep track of your active and inactive accounts.

No.	Name	Username	Role	Workspace	Assigned On	Deactivated On

Sandbox User Management

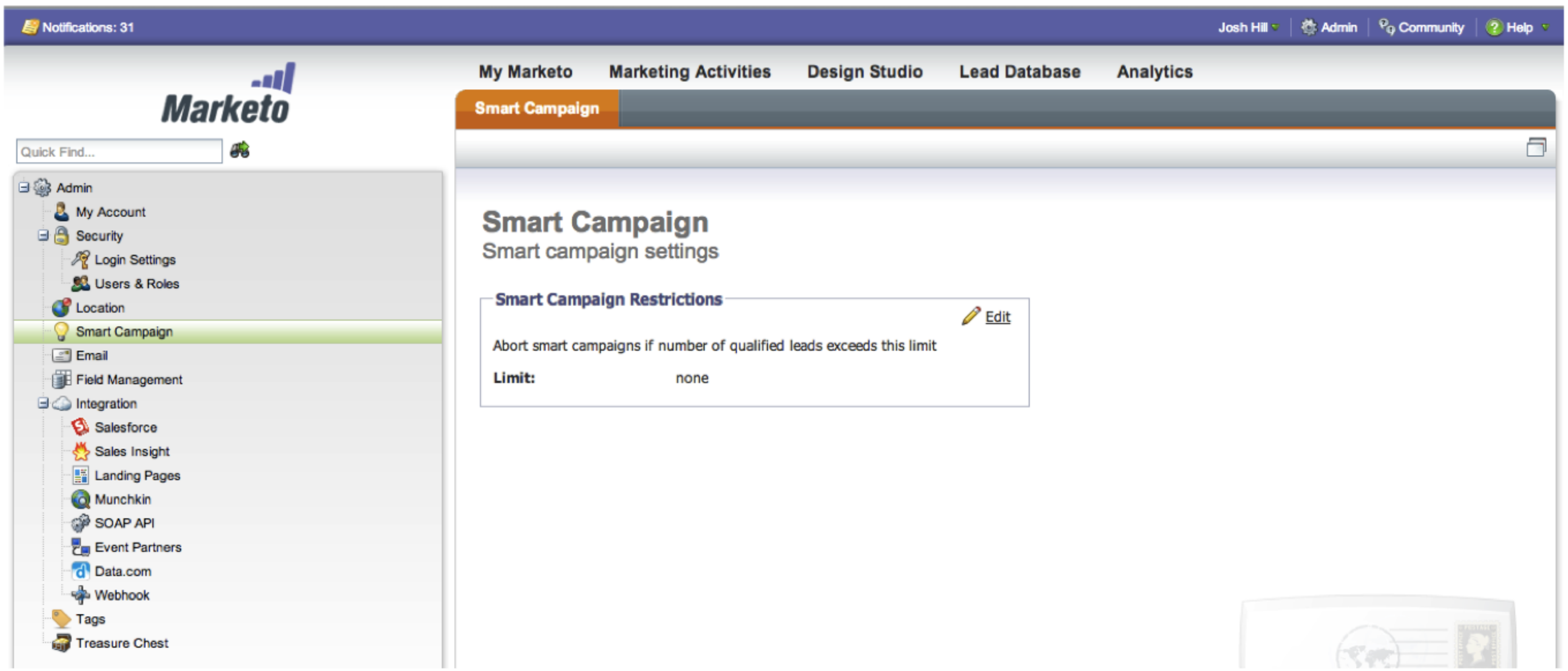
Some organizations will have a test environment with different permissions or people. This is great for testing new fields, workflows, or major changes before rolling them out to a live system across the company. Trust me. It’s a good thing.

No.	Name	Username	Role	Workspace	Assigned On	Deactivated On

No.	Name	Username	Role	Workspace	Assigned On	Deactivated On

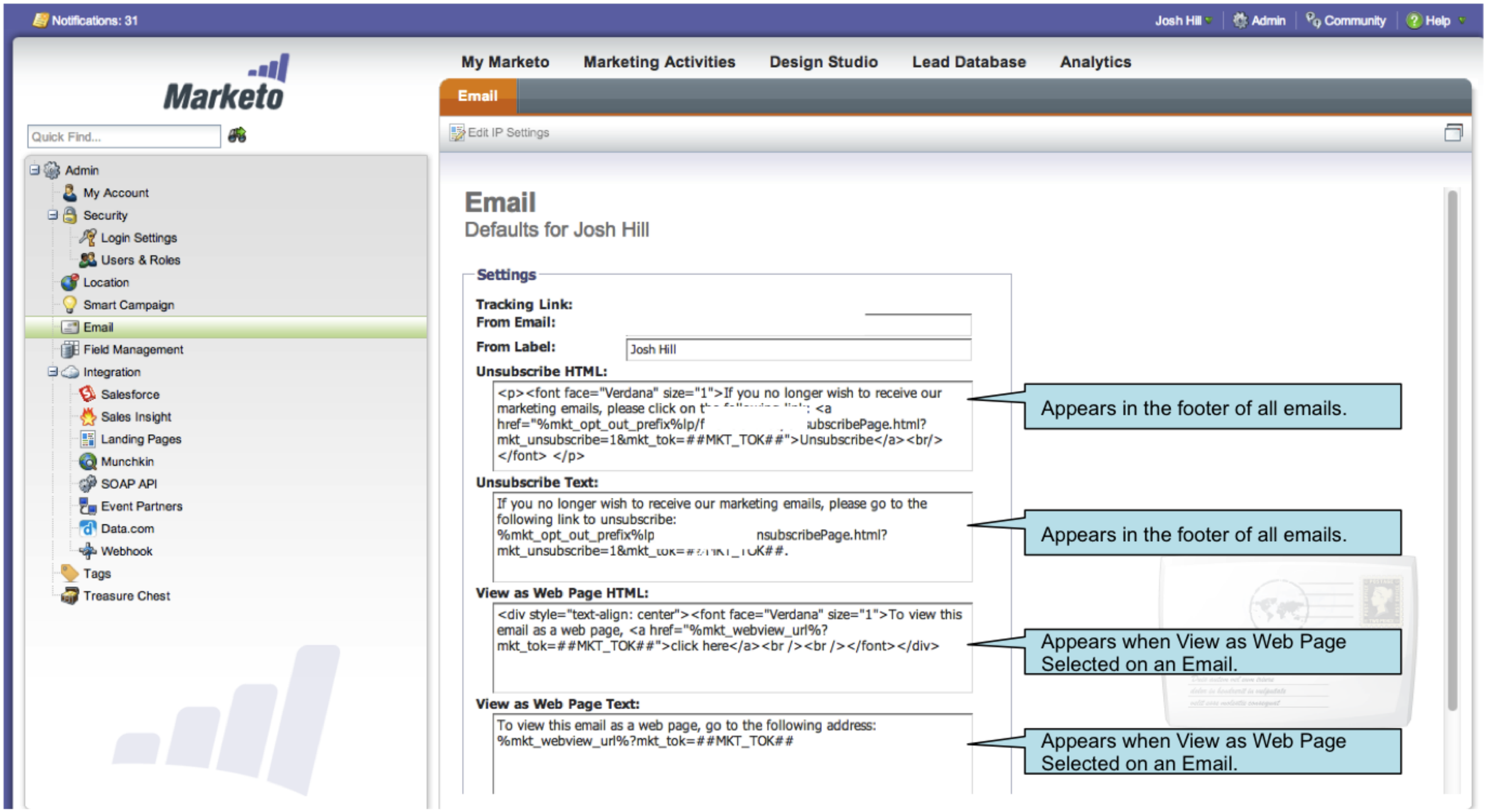
Smart Campaigns

Smart Campaigns allows you to automatically block activation of batch campaigns if the number of qualified leads exceeds the limit you set here. Some firms do this to prevent emailing their entire database, or as a check against bad ideas.



Email

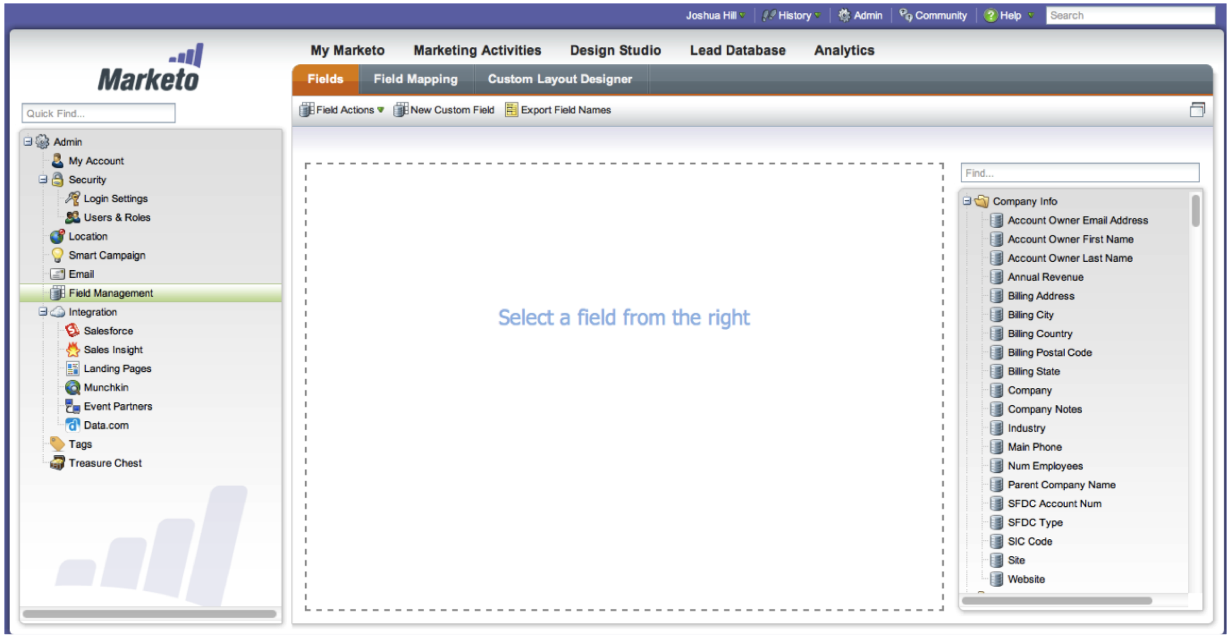
When you select the Email setting in the Admin area, you will see the dialog shown. You should rarely have to come here. The default From Email and From Label are for the current user only.



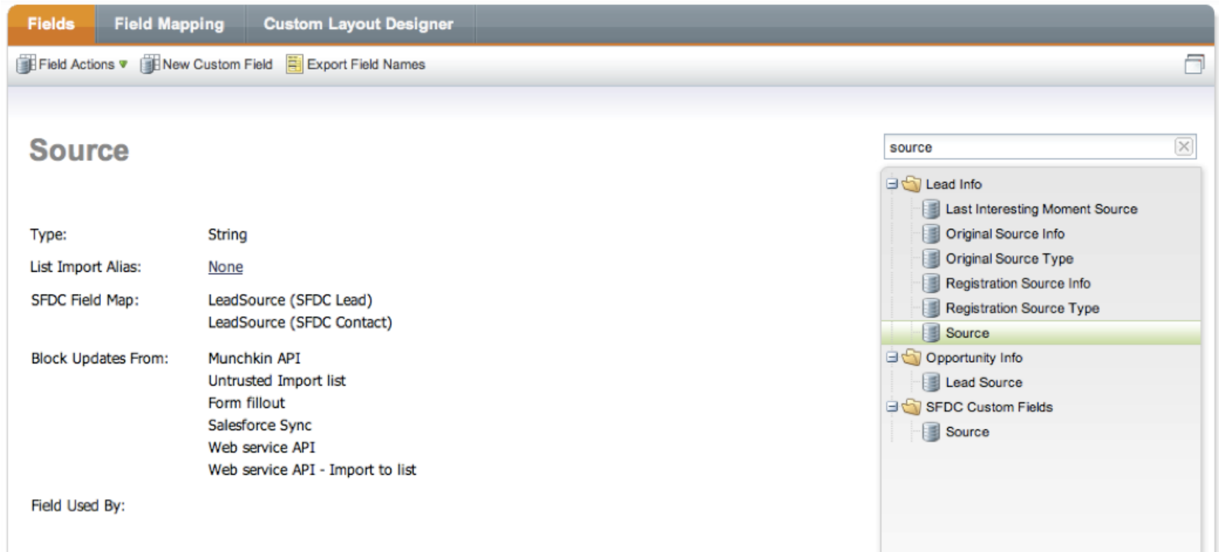
Field Management

Fields

This displays all of the fields in your system and allows you to view their details. This is the [Field Manager](#).

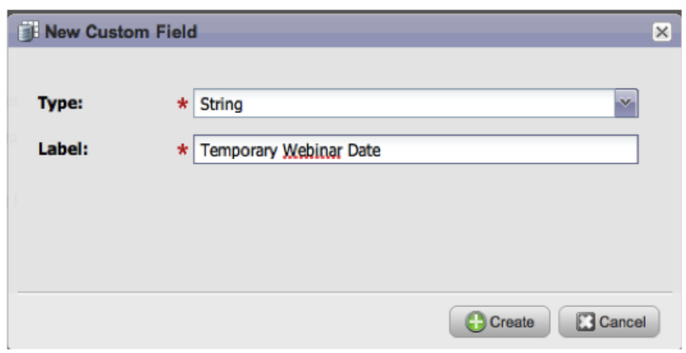


Drag in any field to view its settings.



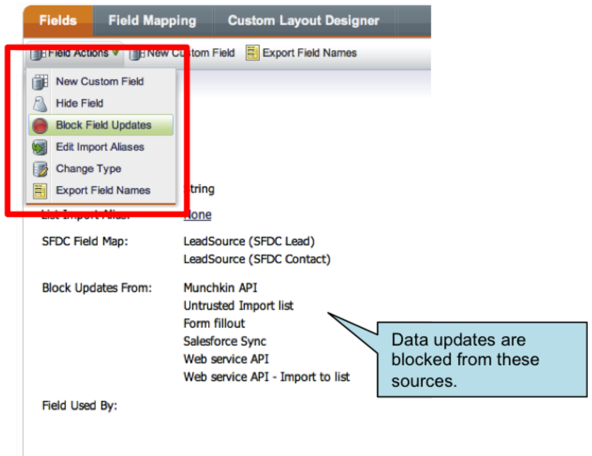
New Custom Field

If you want to create a New Custom Field, you can do so here by press the button. Please review the implications of this in the Salesforce Integration Chapter.

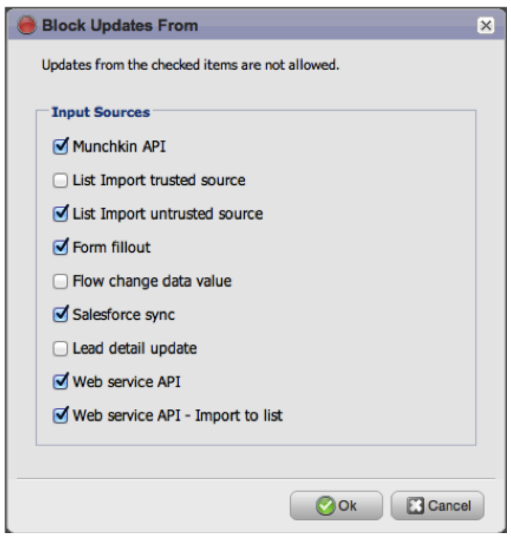


Field Blocking

Field Blocking allows you to stop Marketo from updating a field that has existing data, depending on the source of the new update.



If you select Block Field Updates, you can then select a variety of Input Sources to block.



Field Mapping

This could take up an entire chapter and 99% of you will not need to worry about this. If you are the 1%, then here are a few articles to check out.

How to Use Field Mappings

Default SFDC to Marketo Field Map

Using the Field Manager

Viewing SFDC Mapping

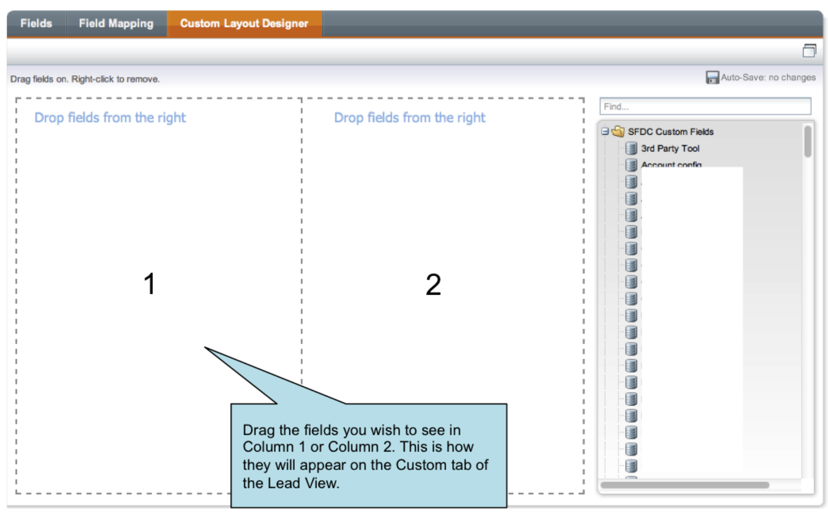
How to create a new field in Marketo

The Difference Between a String and a Text Area

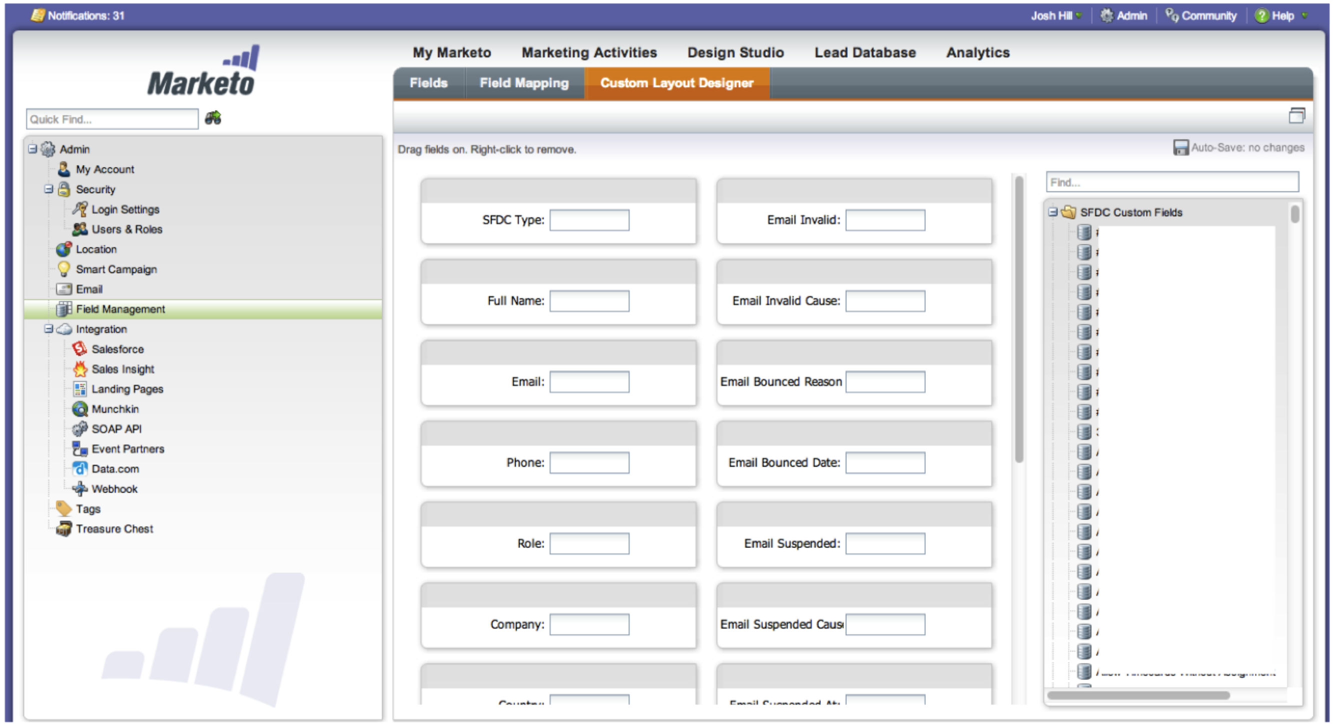
Creating New Fields Part 2

Custom Layout Designer

Use the Custom Layout Designer to rebuild the Lead Detail Views you see when looking at individual records in Marketo.



When you are done, you will see something like this.

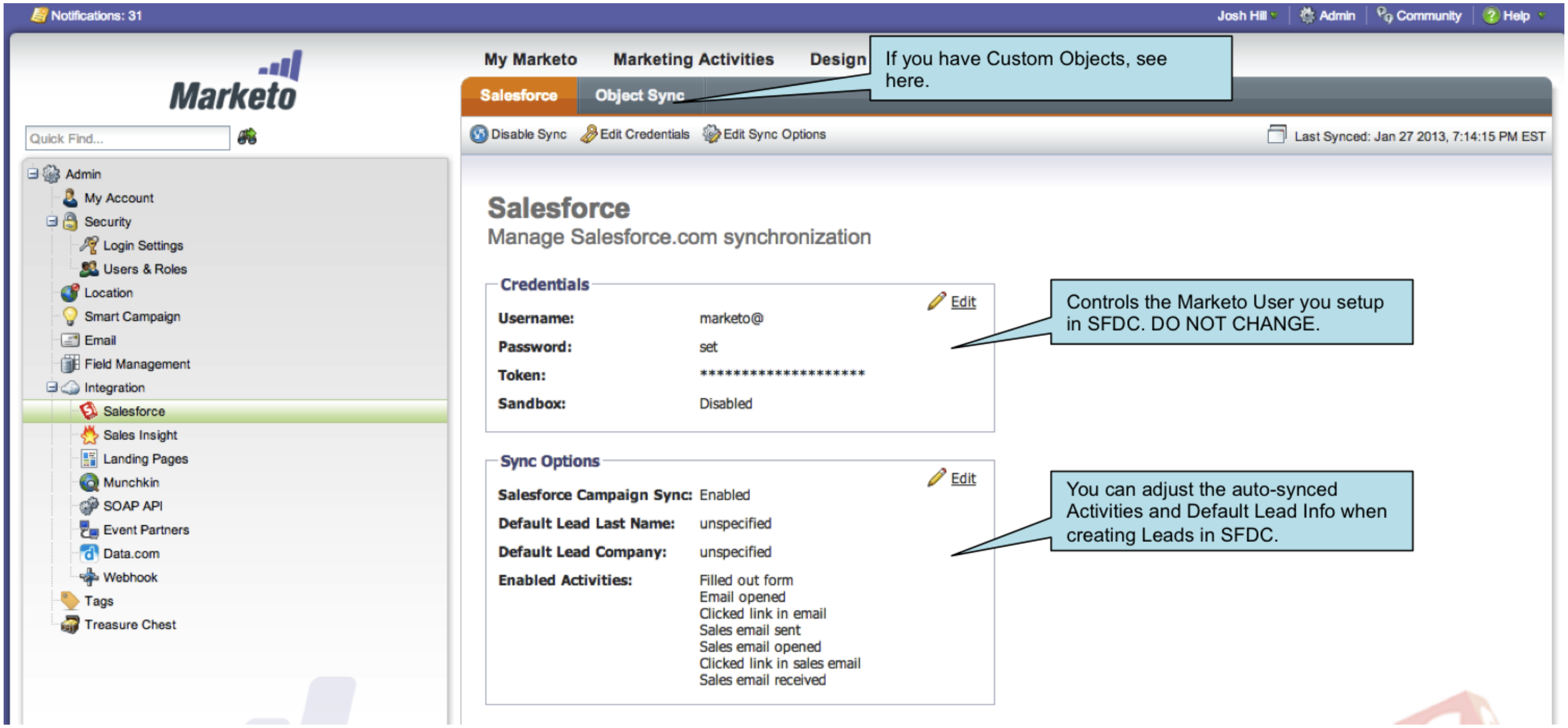


Integration Settings

This grouping holds settings related to your integration with the CRM. In this case, we see Salesforce. Integrated Marketo instances will show "CRM" here with fewer options.

Salesforce

Here you can manage your SFDC Sync. **Please do not make changes here unless you know what you are doing**! Ok, I'll tell you what you should watch for.



Credentials – Do Not Edit

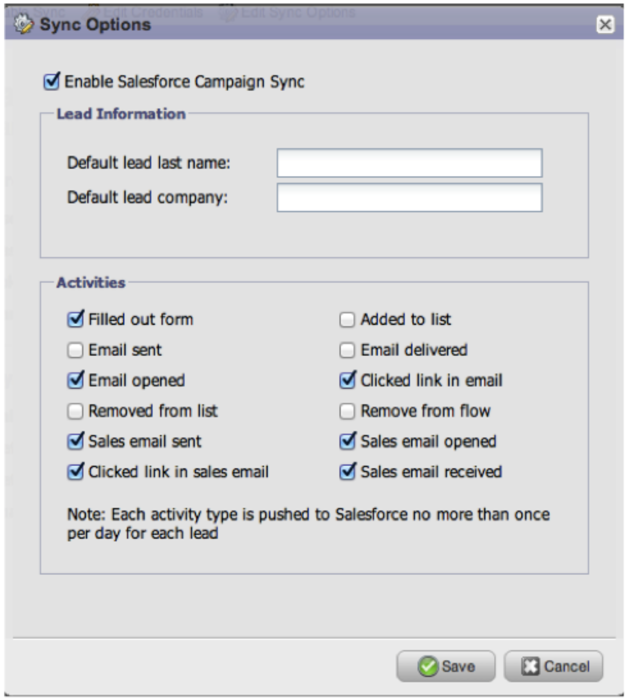
Unless your sync has failed, there is no reason to change this. You would normally enter in:

- **Username**: the SFDC user Marketo will use.
- **Password**: the SFDC User's password.
- **Token**: the SFDC Security Token.
- **Sandbox**: Disabled unless you are syncing to Sandbox.

Please see the [SFDC Integration Guide](#) for details.

Sync Options

You can safely adjust what Marketo will automatically sync to each Lead record. I recommend the following checked items. Do what is best for your team. Keep in mind that the more options you select, the more data is pushed to Salesforce, which could affect your space and API call limit, which impacts your SFDC fee.

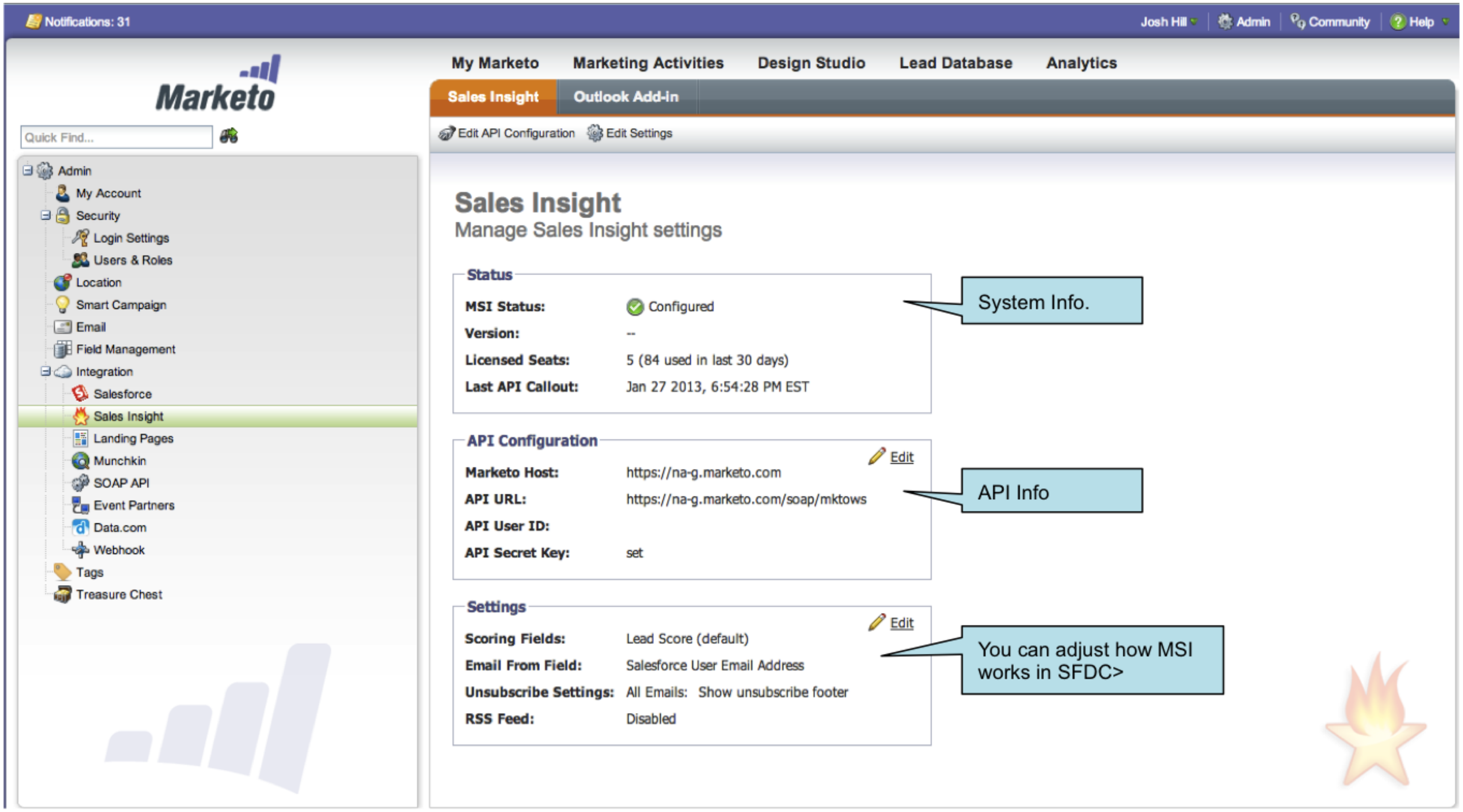


Object Sync

For syncing, read more on the Community.

Sales Insight

If you have purchased Sales Insight licenses, you can adjust the settings here.



Status

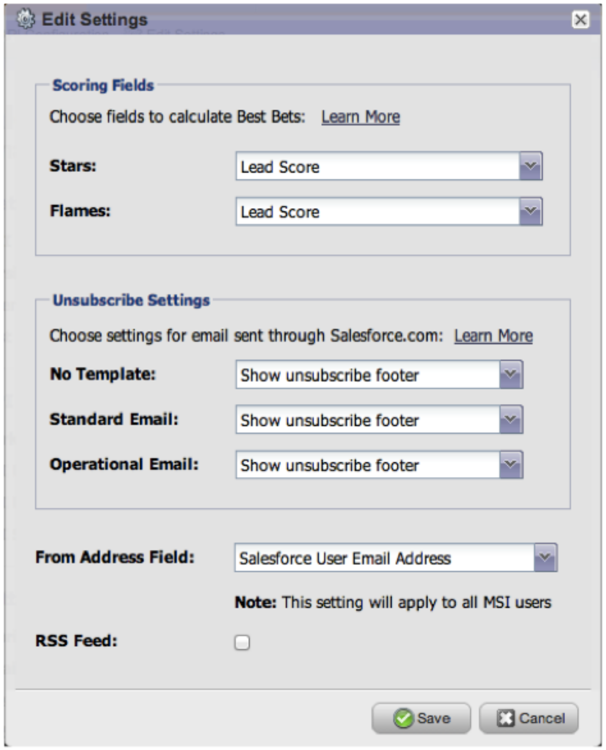
Shows the sync status with Salesforce.

API Configuration

This is set during [Sales Insight Setup](). There is no need to change this.

Settings

You can safely adjust these settings.



Scoring Fields: use these to calculate Best Bets. Only adjust these if you are using customized scoring fields.

Unsubscribe Settings: if a Salesperson uses Sales Insight emails in SFDC, you can force the use of the Unsubscribe footer, or turn it off. You should keep this set to the default `Show Unsubscribe Footer` since many MSI emails are bulk and could cause spam alarms to go off.

From Address Field: this will force the From Address in MSI SFDC emails to be the `SFDC User's Email Address`.

RSS Feed: do you want to allow MSI users to subscribe to their feed via RSS?

You can repair Sales Insight errors with these instructions.

Outlook Add-in

This is where you can setup the sales team to use the Marketo Outlook Plug In. (And some real world advice).

Step 1: Invite a User

To setup a new Outlook User, you must invite that person using a free license.

Step 2: Install the Marketo Outlook Plugin on the User's Machine

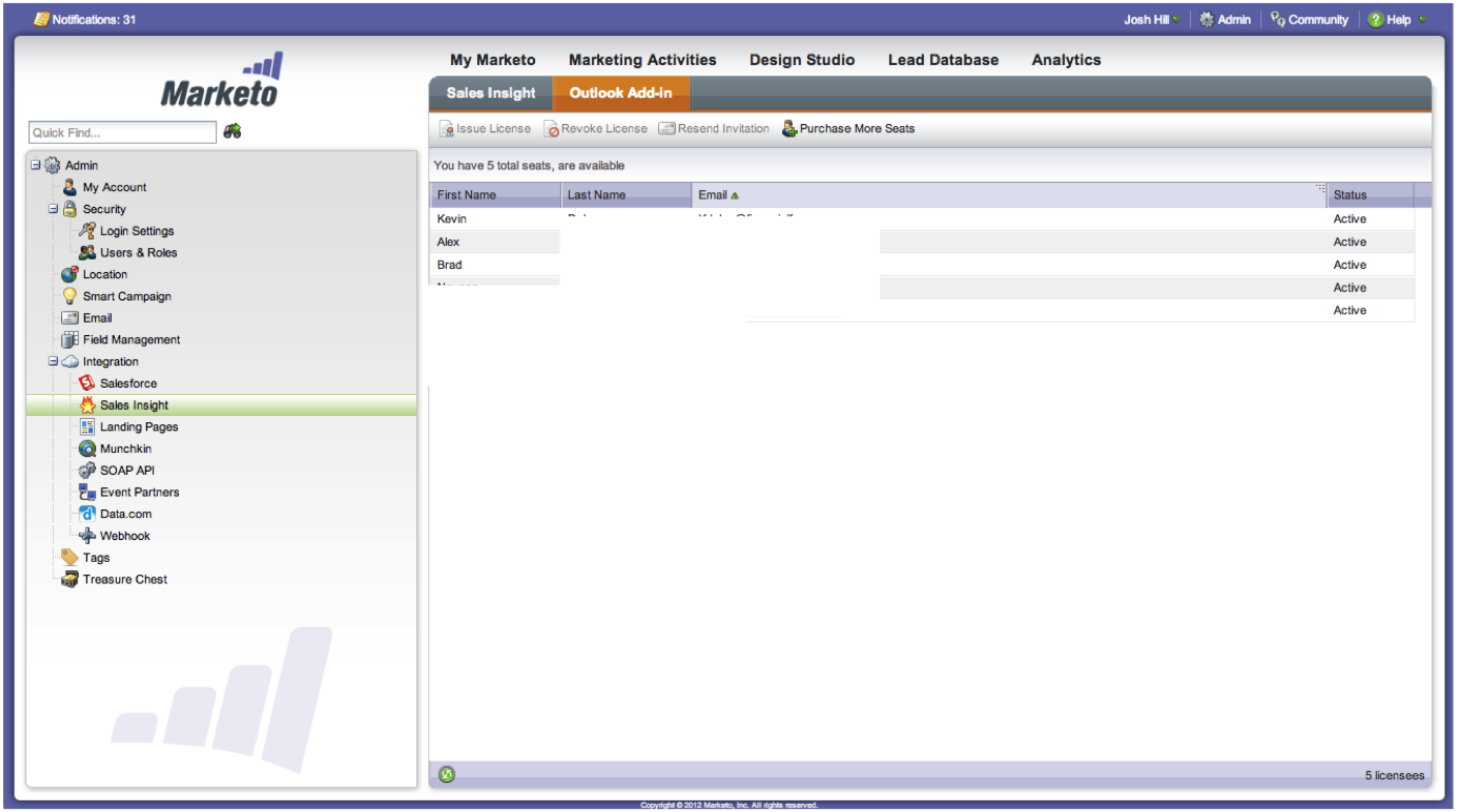
The Outlook User must choose the correct 32/64bit installer version.

Step 3: Enter the Personal Information

Be sure to enter the Registration Code from the Invitation Email.

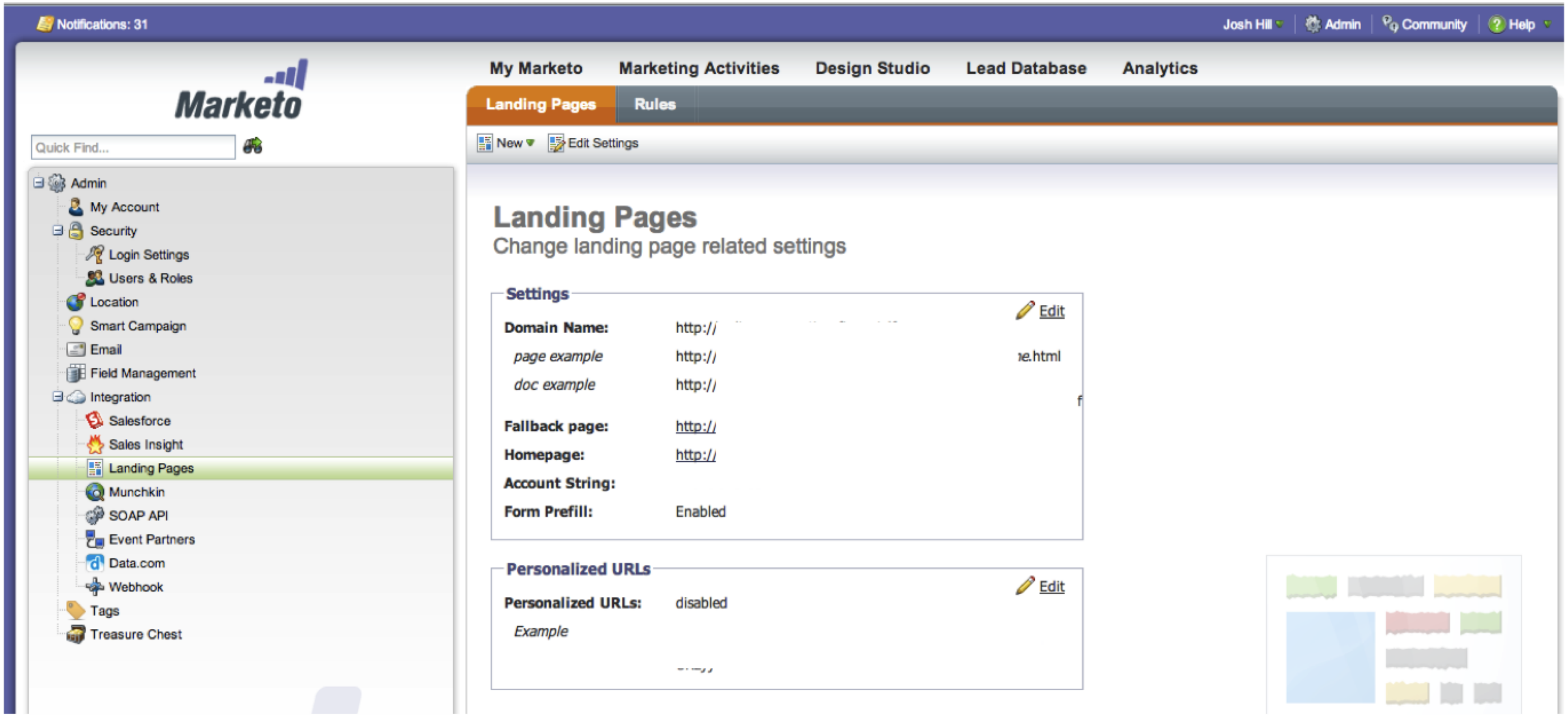
Re-open Outlook

You will now see the Marketo Plugin to allow you to do `New Marketo Message` (from approved Sales Insight Emails) and `Log with Marketo` to post non-Marketo emails back to the Lead record.



Landing Pages

Allow you to control the main Landing Page settings. You can adjust the CNAME Marketo uses for your landing pages here. See my [DKIM and CNAME instructions] for further details.



Fallback Page: change the default 404 setting. Users will go to this page if the landing page no longer is active.

Home Page: main home page.

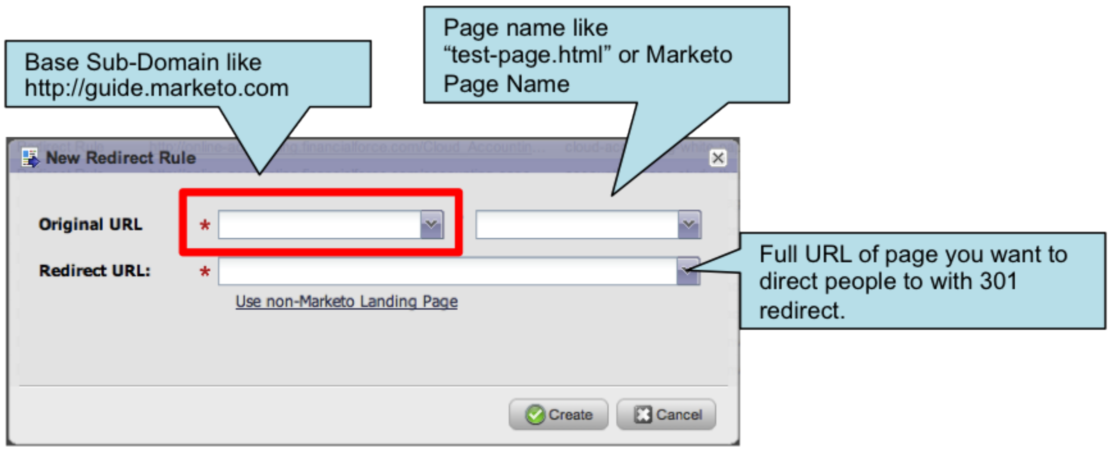
Form Prefill: do you want Form pre-fill on by default? Yes you do. If you do not, you will need to explicitly turn this on for each page+form combination.

PURLs: this is disabled. See the instructions to activate.

Rules

Best Practice: use a redirect so leads can still find your changed pages.

Landing Page Rules are 301 redirects you can control from either the individual page or here, where you can see all the Rules. When you change the Page URL on an individual Landing Page, the Rule is setup here. You can then Edit or Delete a Rule. You can also create a New Rule if you know the URLs involved.



Domain Aliases are also available to create Microsites if you prefer to use [more than one sub-domain](#) (CNAME). If you have multiple sub-domains, you will see the others in the red box above.

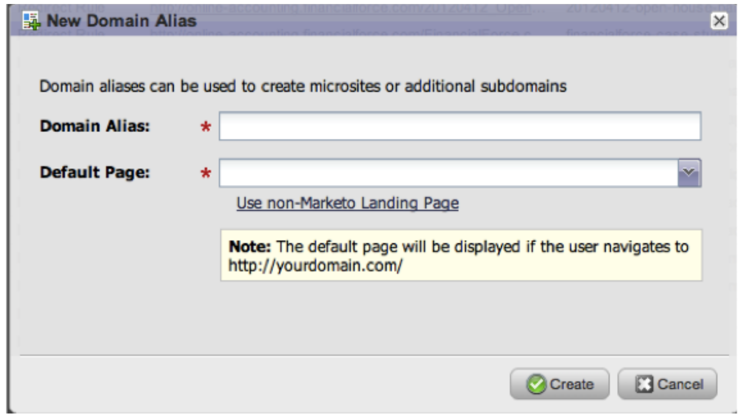
To create a second sub-domain and then point it to a microsite entry page:

Step 1: Create a CNAME on your DNS

Step 2: Go to Landing Pages

Step 3: Click New Domain Alias

Step 4: Fill in the Domain Alias

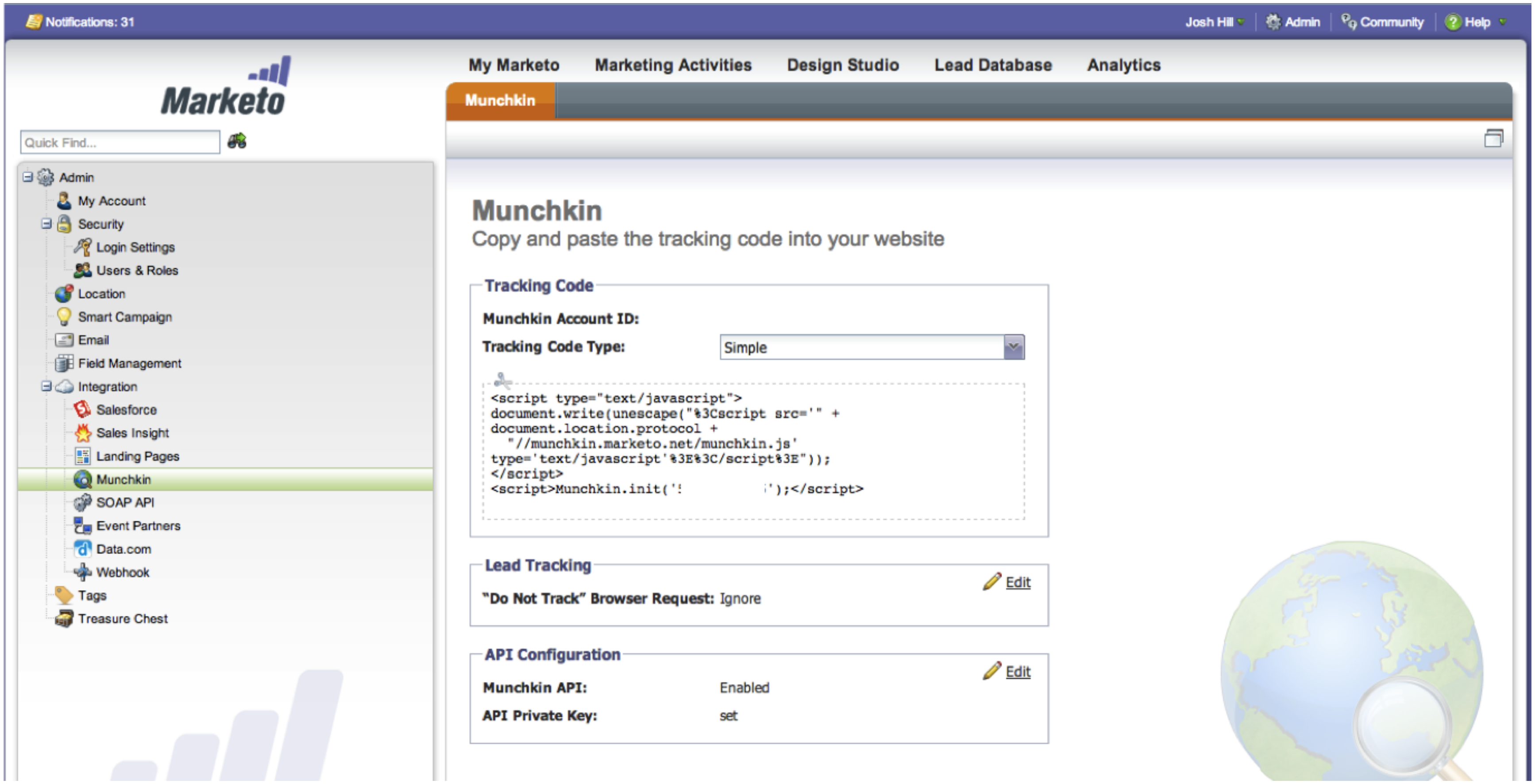


Step 5: Fill in the Start Page the Alias Points to

Step 6: Press Create

Munchkin

This is where you can find the Marketo tracking code, called [Munchkin](#).



This code appears automatically in your Landing Page Templates, if you haven’t deleted it accidentally. You need to copy the code in the snippet area. Your choices are

- **Simple**: just JavaScript.
- **Asynchronous (Aysnc):** reduces page-loading time if jQuery was already loaded.

- **Asynchronous jQuery**: reduces page loading time and performance, but does not check if jQuery was already loaded.

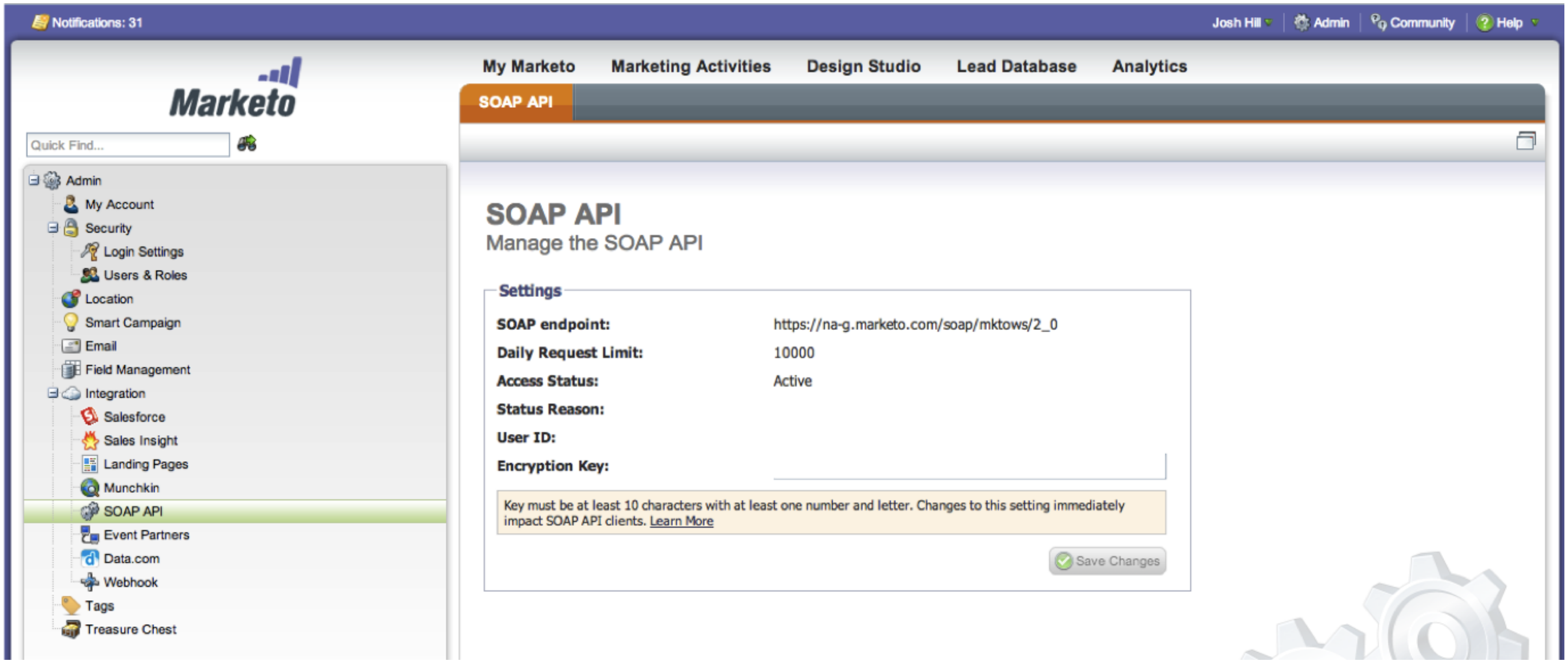
Ask your web team or analytics guru which one is best for your system.

Caution: Some jurisdictions may require you to honor Do Not Track or warn EU users about cookies.

Lead Tracking: you can choose to Ignore the Do Not Track Browser Request some browsers offer users. If you honor the request, Munchkin code will not set tracking cookies and you cannot see what your Leads are doing on your pages.

API Configuration: enable this if you plan to integrate third party web systems.

SOAP API



This is where you set the SOAP API Keys you can use when integrating Marketo with third party applications or websites. To [configure the SOAP API](#), follow these directions. You can only adjust the Encryption Key.

SOAP Endpoint: make your SOAP calls to this URL.

Daily Request Limit: maximum calls per 24 hours.

Access Status: Active. If not, call Support.

Status Reason: details.

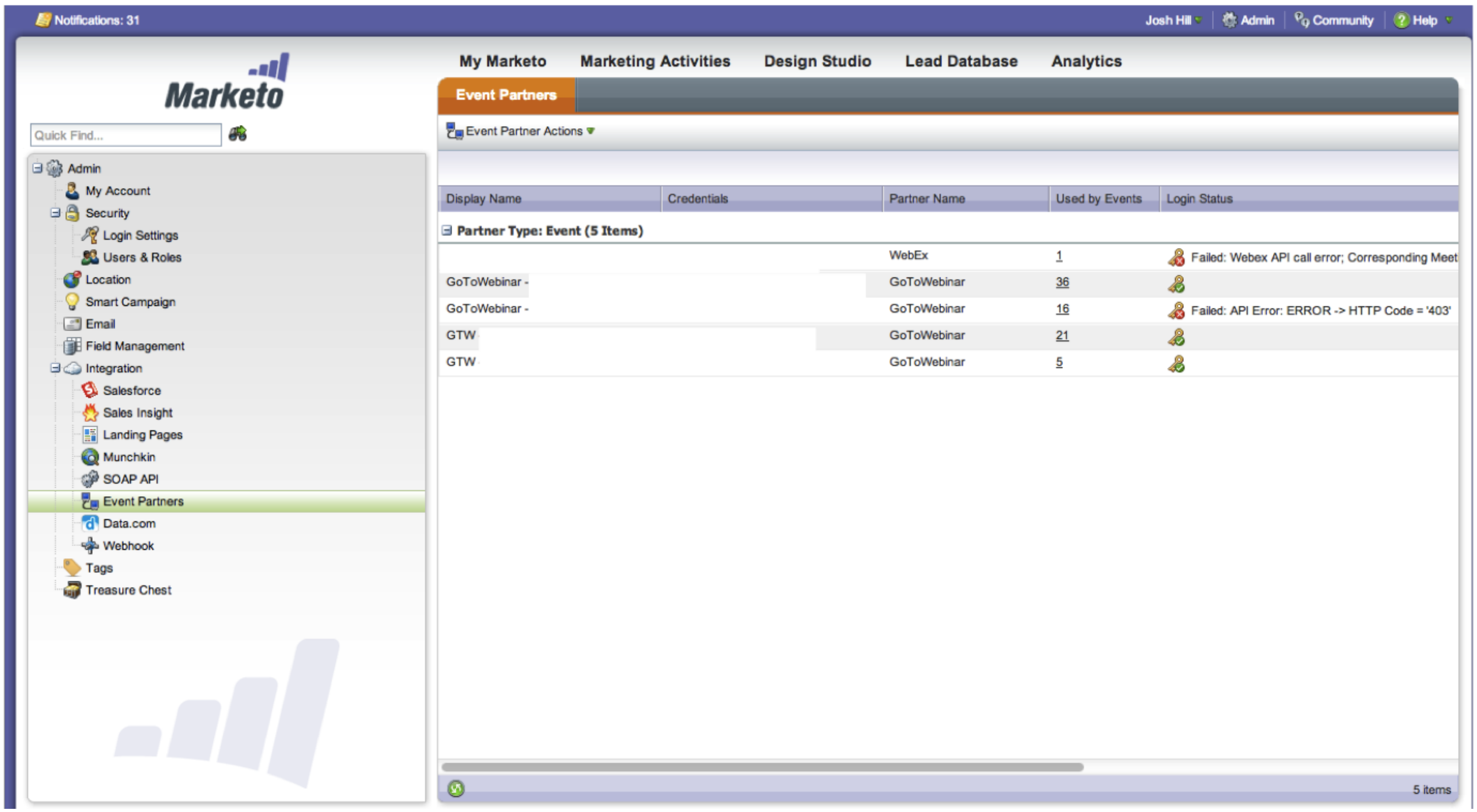
User ID: the User ID to use.

Encryption Key: enter more than 10 character Hex key here to ensure only applications you authorize can access Marketo. I recommend [Random Key Generator](#).

There are many discussions about how to use the SOAP API.

Event Partners

Marketo supports several webinar event providers as of January 2013. Use this tool to add logins to connect to one or more providers. These users will then be available when you select the `Webinar Channel Program`.

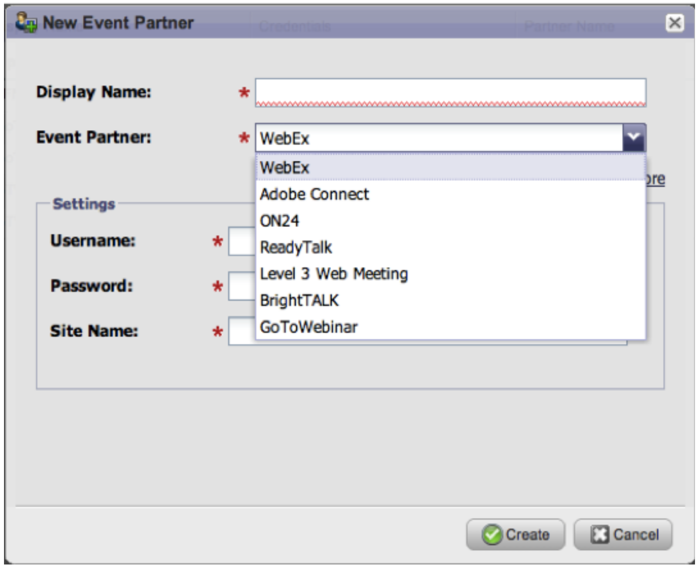


It is important to note you can have multiple users for one provider or multiple providers. It's up to you! For example, if you have 5 GoToWebinar Accounts, you can add all 5 users to Marketo as Event Partners. Keep in mind that webinars created by one user cannot be seen by other users, so choose the right Event Partner Account when you connect your Webinar Programs.

To add a New Event Partner (or username)…

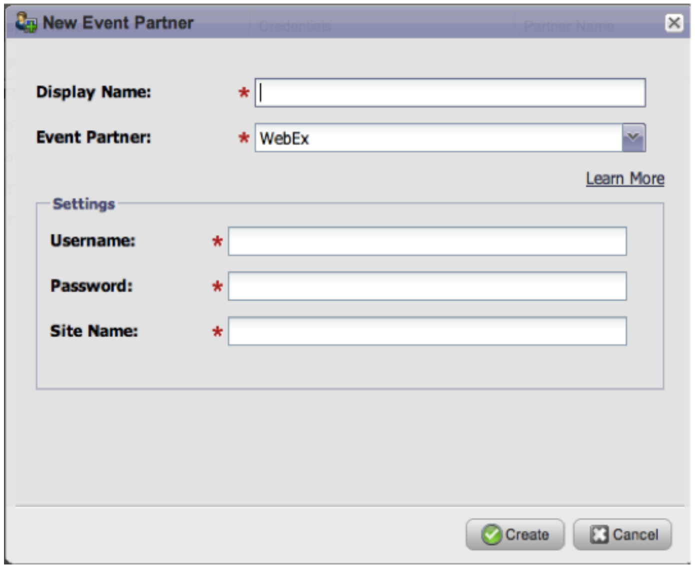
Step 1: Press Event Partner Actions > New Event Partner

Step 2: Choose the Provider

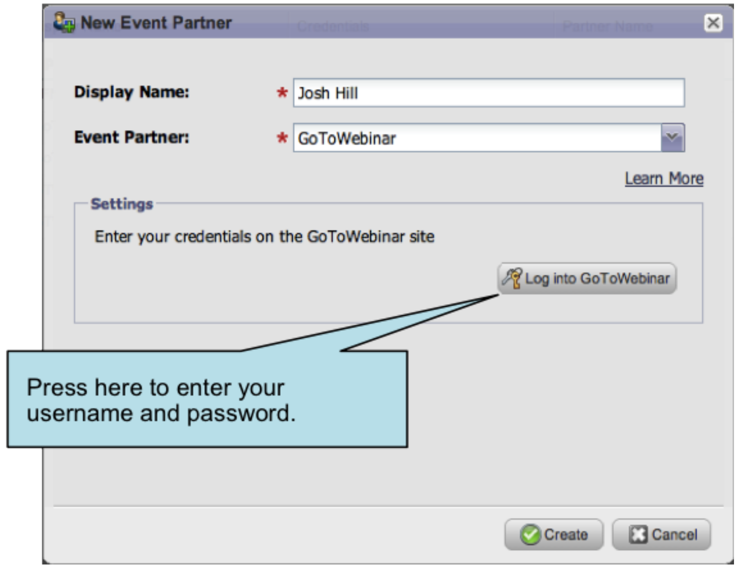


Step 3: Enter in the details

Each partner may have a slightly different dialog.



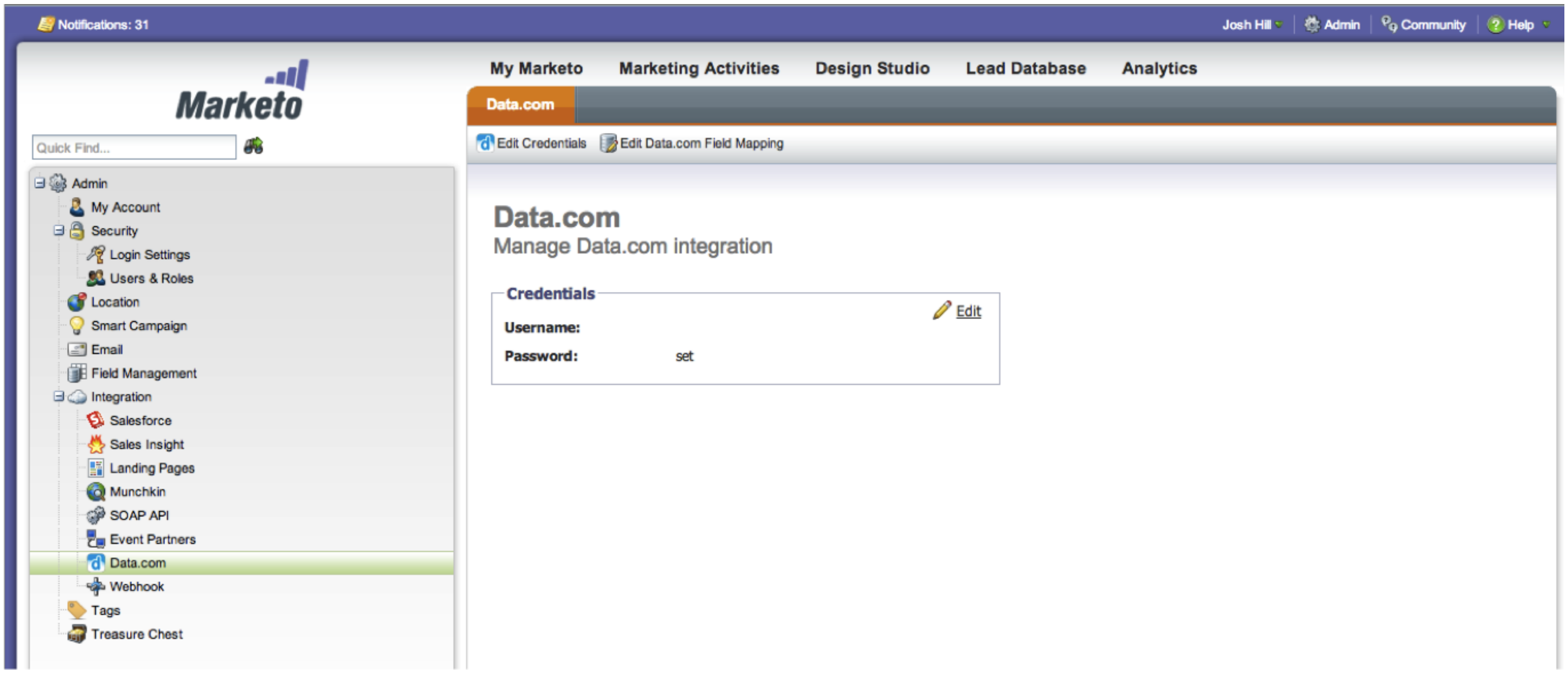
For GoToWebinar, you will click on a button to have Marketo login.


New Event Partner
Display Name:
Josh Hill
Event Partner:
GoToWebinar
Learn More
Settings
Enter your credentials on the GoToWebinar site
Log into GoToWebinar
Press here to enter your username and password.
Create
Cancel

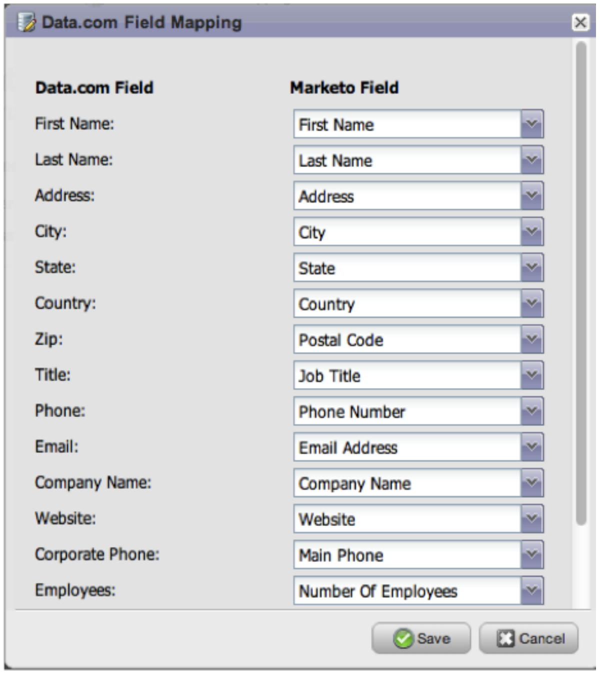
Data.com

You can manage the Data.com integration here. I wrote more about this in the [Data.com Chapter](). A quick summary:

Credentials: you need a valid Jigsaw.com account with credits. It is 5 credits per match.

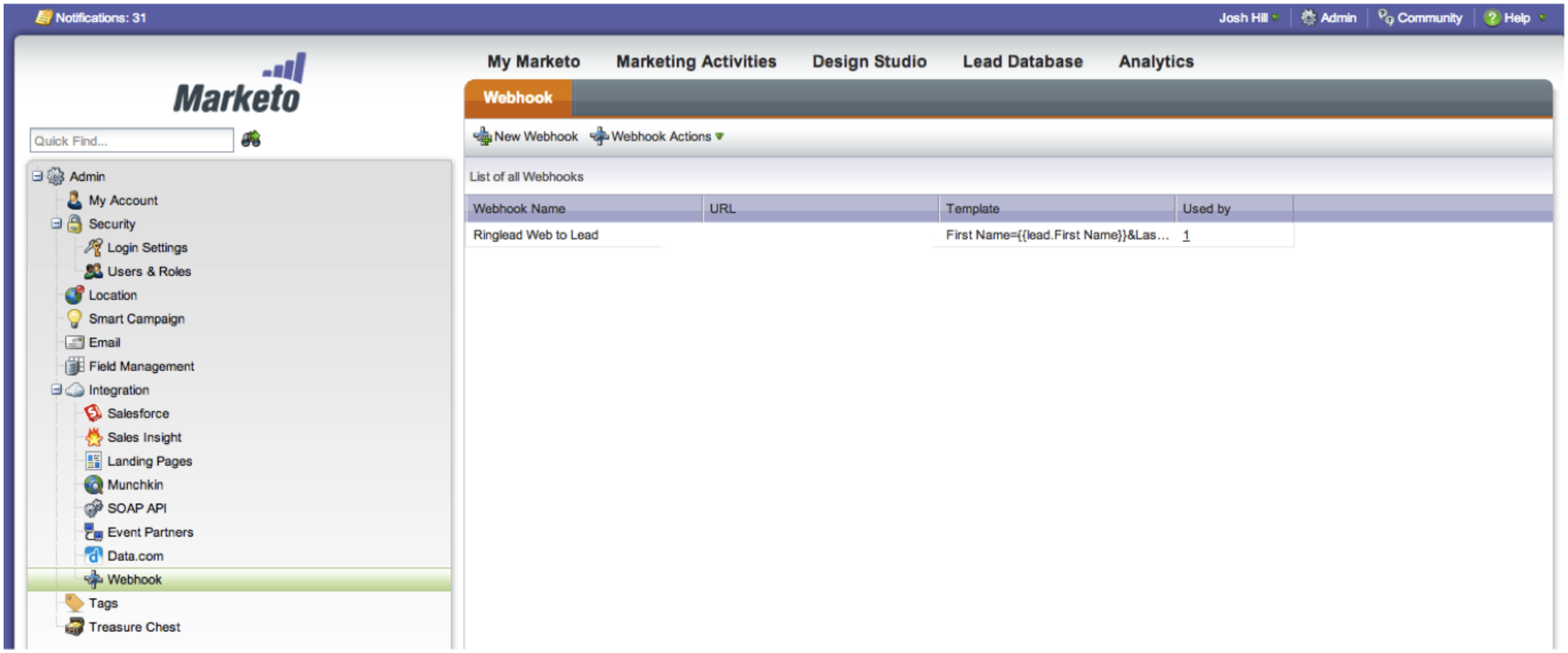


Edit Data.com Field Mapping: this should be fine by default, but you can check if Data.com’s fields match yours in Marketo.



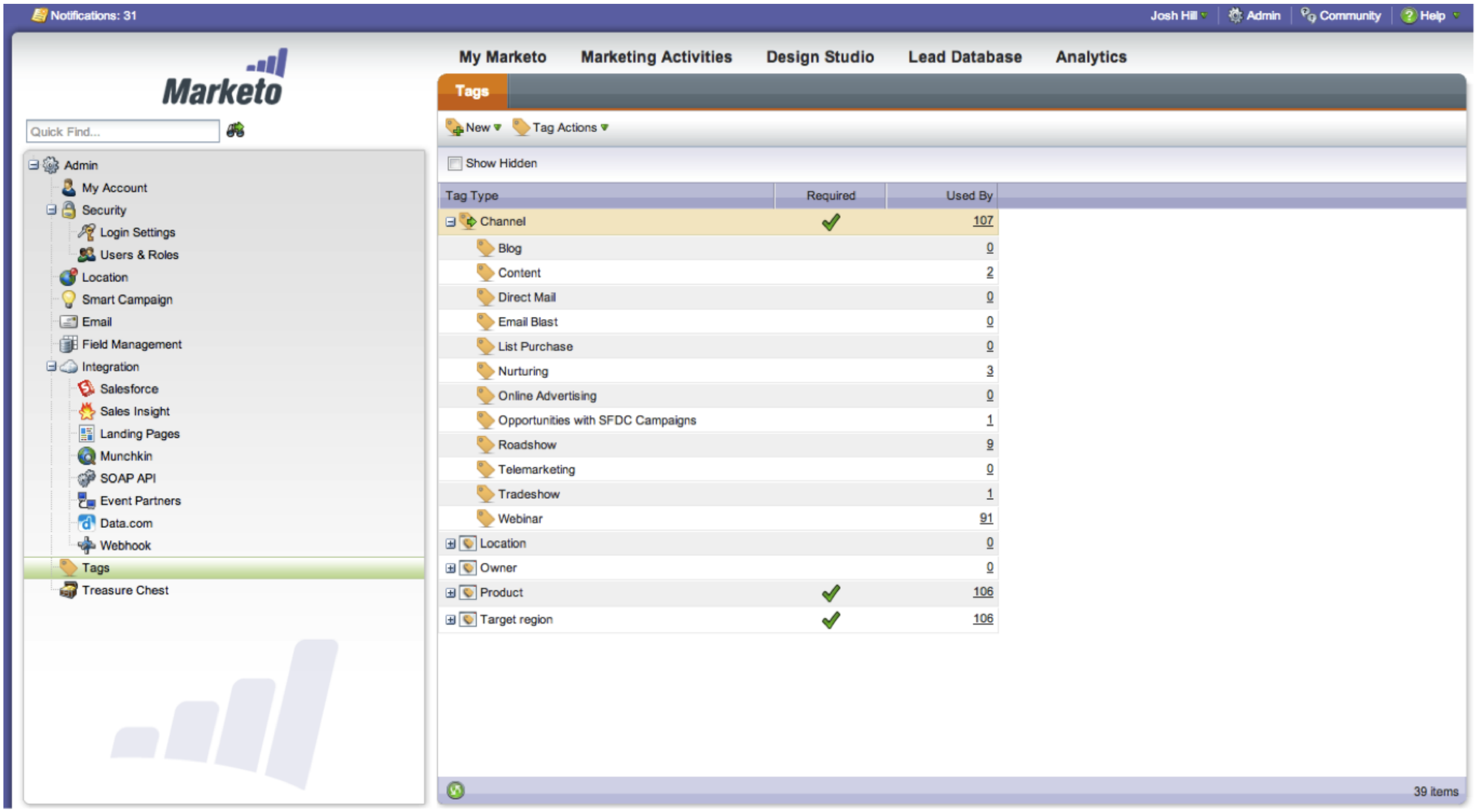
Webhook (If activated)

Webhooks allow you to tell another system (or send data to another system) when something happens in Marketo. This can also be a two-way path for data. This must be enabled in the Treasure Chest. Then you must create a New Webhook and enter in the correct details. Learn more about Webhooks.

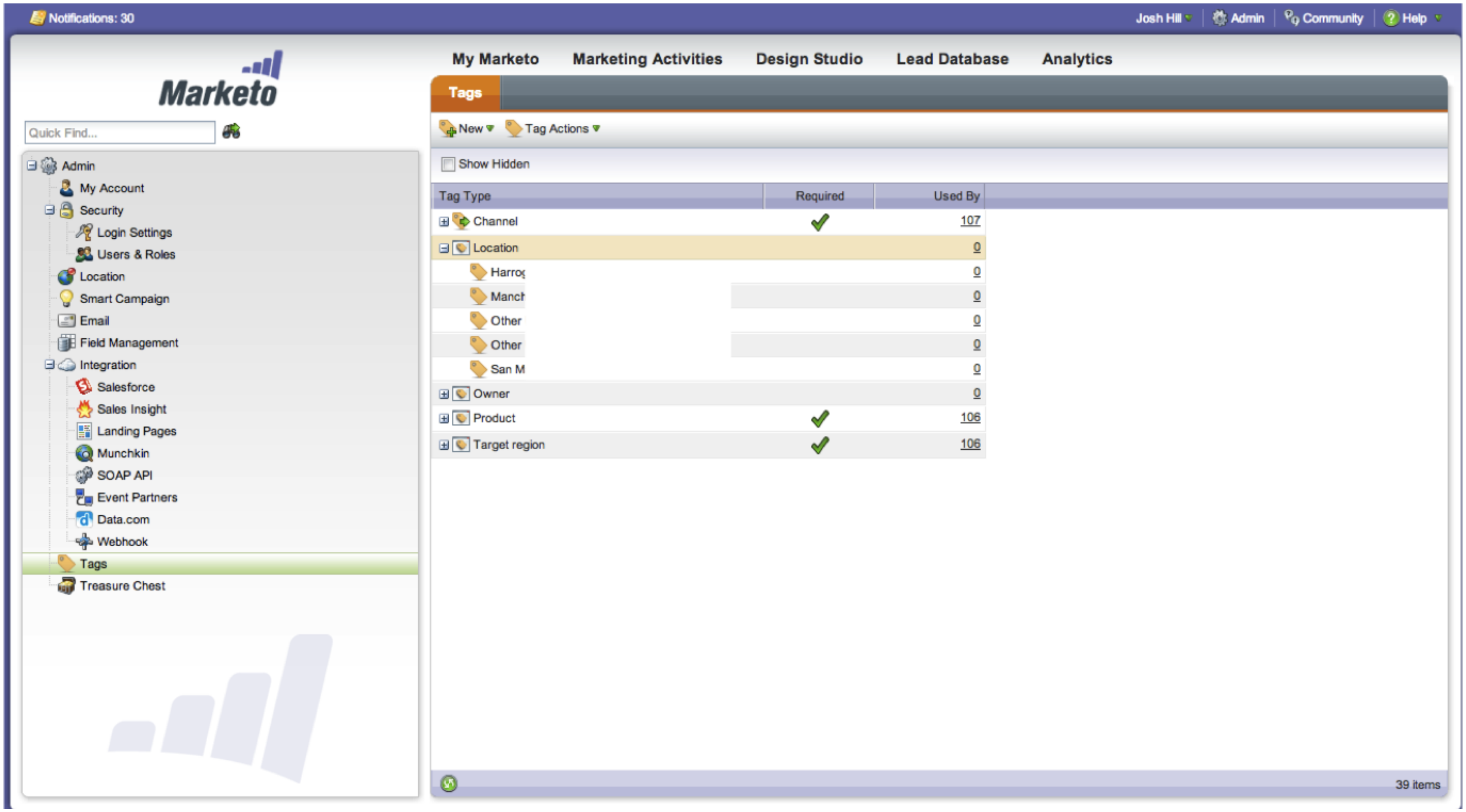


Tags

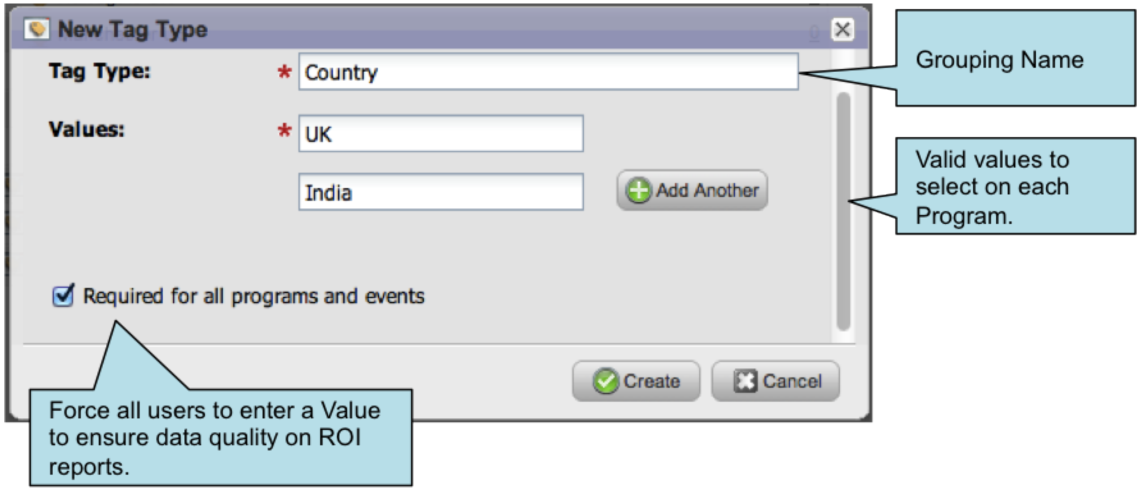
Tags are a way of grouping data for reports. They identify the Program and other pieces primarily for the Revenue Cycle Analytics tool. The most common Tags you will encounter are the Channel Tags.



Tag Types: you can create New Types and then add Values to them. A tag type could help you track Program success by Owner, Region, or Country. These are essentially groupings you setup in advance to help reporting.



Tag Value: if you select an existing value or Tag Type, you can edit that Value.

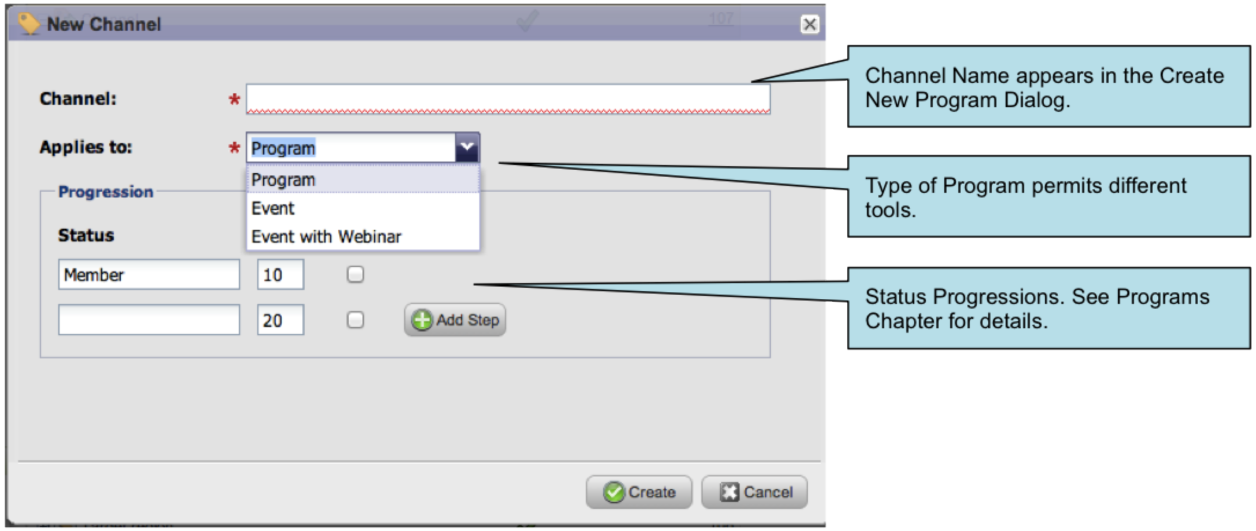


Warning: do not edit the default Channels or you will lose them forever.

Channel Tags: these are the Channels that appear on every Program. You can create custom Channels or use the Defaults. Each Channel has a set of Progression Statuses you create. Marketo uses them to help you track success as well as a Lead's current position. There are three Types of Channels:

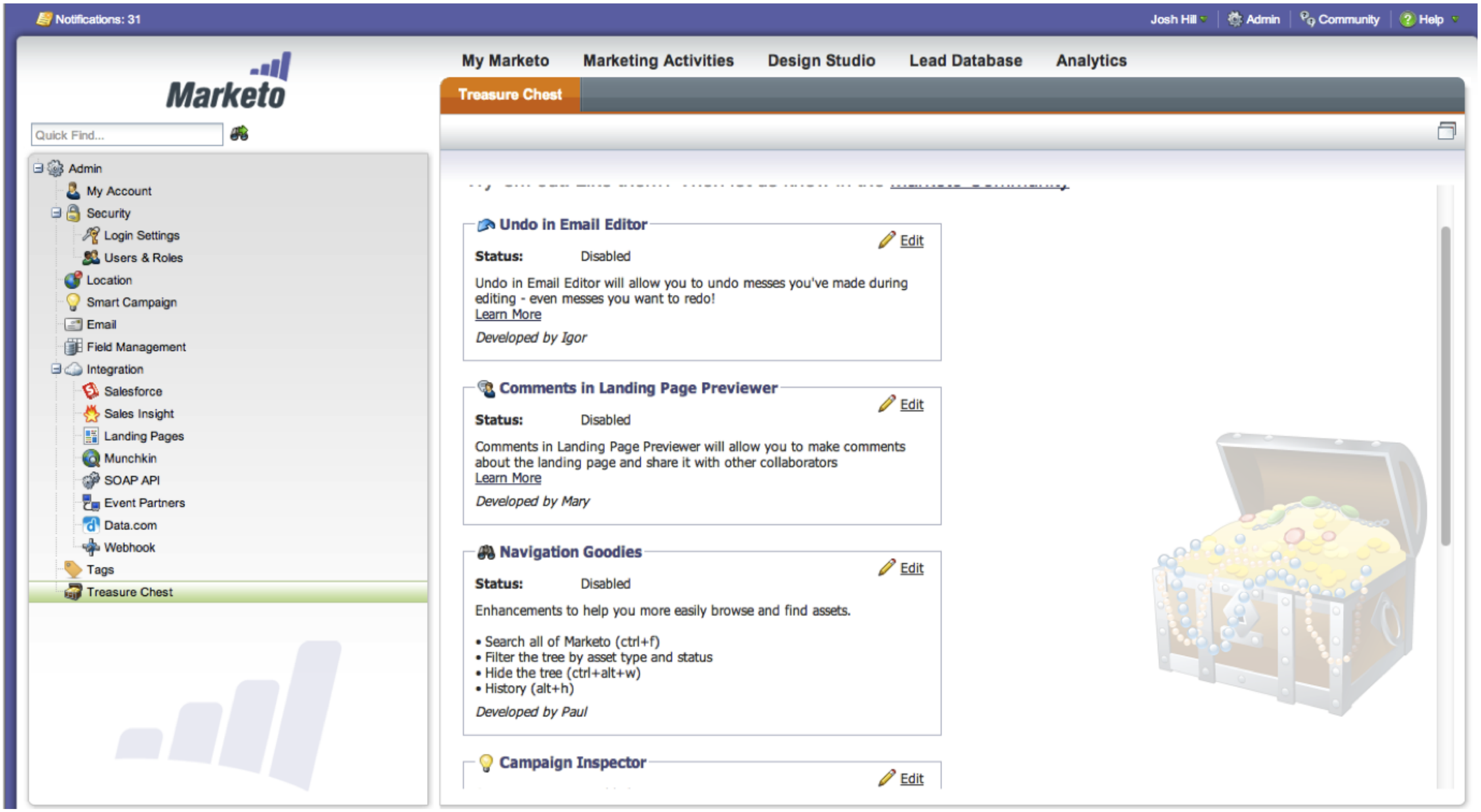
- **Event**: such as Trade Shows or Roadshows – this enables the iPad App.
- **Event with Webinar**: enables the Webinar Partners.
- **Program**: such as emails or others.

More details are available in the Programs Chapter.


New Channel
Channel:
Applies to:
Program
Program
Event
Event with Webinar
Progression
Status
Member
10
20
Add Step
Create
Cancel
Channel Name appears in the Create New Program Dialog.
Type of Program permits different tools.
Status Progressions. See Programs Chapter for details.

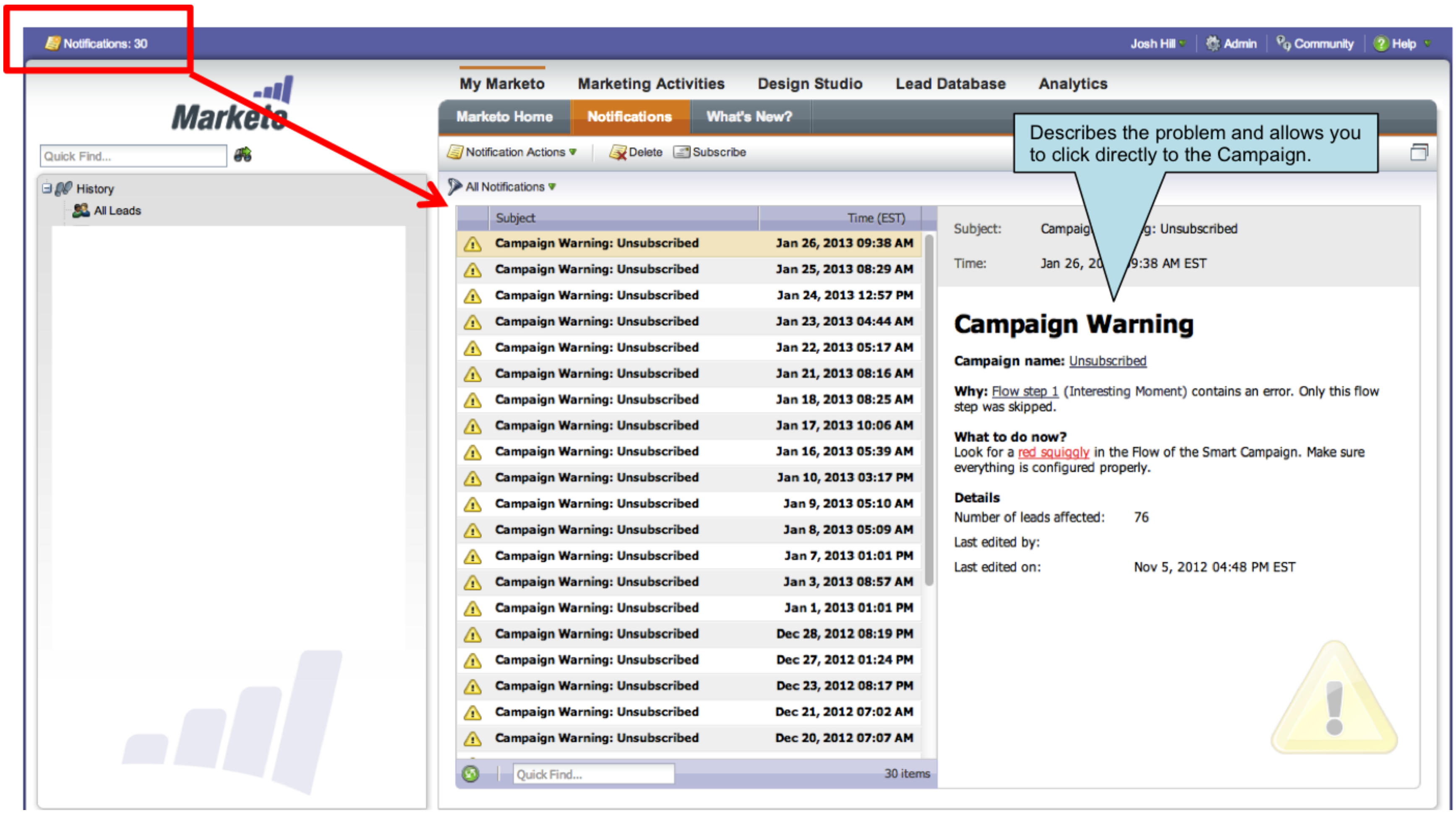
Treasure Chest

The Treasure Chest is a place for Marketo to offer you the chance to test new features that might be optional or still under development. If you are an Admin, you will want to stop by here during each month's release to check out cool features you can try out.



Notifications

Notifications are system-generated notes created whenever a Campaign or Sync fails in some way. Usually these are errors from missing parts of Flow steps. But sometimes they are serious. If you start to see the Note icon, it's best to check them out and fix the problem.



You can mark Notification as `Read/Unread` or `Delete` them when you are done. You may also `subscribe to Notifications` by email. Use the `Notifications Actions` menu.

Other Administrative Sections Not Covered

There are other Admin tools available depending on your Marketo license. These include

- **Workspaces and Partitions**: these restrict access to leads if your firm has multiple product lines, territories, or divisions, which must separate Leads.
- **Microsoft Dynamics** setup info is here.
- **Social Settings** are usually found at their point of use.

Chapter Review

Self-Quiz

A user may have more than one Role: T/F?

A user should have more than one Role: T/F?

Why is Security Important?

Recommended Resources

Marketo Documentation Marketo

[Managing Roles & Permissions]

[Partitions]

[Workspace Administration]

[Recommended Role Ideas]

[A less useful Roles article]

[Full Description of Role Access Items]

[Workspace and User Roles]

[User Language and Time Zone Preferences]

[Munchkin Code Documentation]

[Munchkin Overview]

[Webhook Setup]

Marketo Community

[Switching from Simple to Asynchronous Munchkin]

Other Sources

[System Administrator definition]

[Password Basics]

[Understanding User Provisioning]

Chapter 9. Salesforce Integration

At a Glance

Overview

Congratulations on selecting Marketo for your revenue performance management needs! Now comes the hard work: integrating your Salesforce instance with Marketo.

The integration process requires careful planning, training, and action across a number of different departments. The purpose of this section is to guide you through this process with the experience of others who have done it before you. Marketo has excellent documentation on the precise steps you will follow for specific actions. I highly recommend that you download the documentation Marketo provides as well as work closely with your enablement manager for the best possible experience. At the end of this section, you will find links to many Marketo articles, documents, and Community discussions related to the implementation and sync.

Please use this section as a general guide to understanding the details of the sync from a marketer's perspective. While this section is detailed, it does not substitute for reading the official Marketo documentation.

Implementation Steps Overview

Implementing Marketo is not just about the sync. For the sync to work as you want—and as Marketo advertises—it is up to you and your team to plan out the lead management system you want. There is a seven-step process to develop the lead lifecycle and then sync the two systems together.

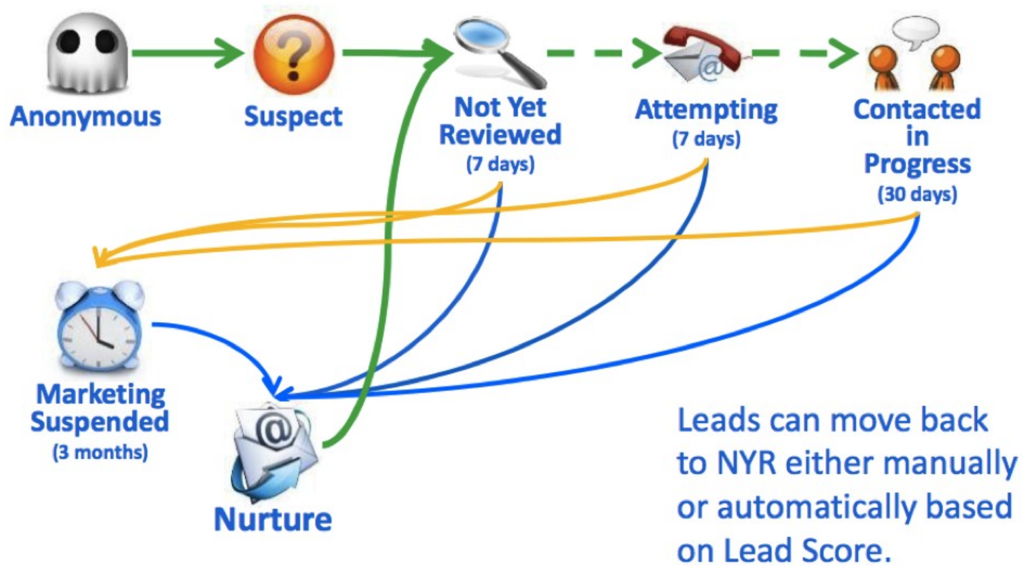
1. Lead Lifecycle Planning
2. Marketo User SFDC Permissions
3. *SFDC Changes in Sandbox (optional, recommended)*
4. *Marketo Sandbox Testing (optional, recommended)*
5. SFDC Changes in Production
6. SFDC – Marketo App Installation
7. SFDC-Marketo Sync

Preparing Salesforce for Marketo

A successful first sync starts with careful planning. For many firms, this is an opportunity to revamp your lead lifecycle systems for the new era from data cleanup to automation of reports. Work with Sales, Marketing, and Technology to update your CRM so you can take advantage of the lead lifecycle automation Marketo offers.

If you simply sync Marketo with your existing CRM/SFDC instance, you will likely have a tremendous problem in 6 to 12 months when you need to adjust your system to better handle inbound marketing.

Lead Lifecycle



Example Lifecycle from Coraid. May 2012.

Lead Definitions (ULD)

If you have not done so already, now is also the time to develop a Universal Lead Definition. Bring sales and marketing together to agree on what constitutes a Prospect, Lead, and Qualified Lead. Having a ULD will also help you as you develop your Lead Scoring System.

What to Report On

Note: Marketo's RCA package can enhance or supplement SFDC reports out of the box.

If your CRM does not have a solid dashboard system reporting on your sales funnel, now is the time to develop a list of required reports and charts along with reporting frequencies and scales. You will want to segment these by audience: Board, Executives, Marketing, Sales, and campaign managers. Understanding email deliverability by campaign is for your demand gen team, not your CEO.

Marketo and other leading demand generation thinkers suggest a variety of reports. Each business is different and you may want to adapt these to your business.

Report	Audience	Purpose	System
Leads by Source	Managers	Show best performing channels.	Marketo or SFDC

Leads over Time	Managers, Execs	Show progress over time.	Marketo or SFDC
Email Deliverability Over Time	Managers, Ops	Show ability to reach list/list quality.	Marketo and Excel
Leads by Buying Stage	Execs, Board	Show conversion rates through the funnel. Impact of Programs on Revenue.	Marketo, SFDC, Marketo RCA

Lead Status and Source Changes

Caution: have a picklist migration definition table prepared in advance.

Agree on how to migrate existing statuses to the desired statuses. Marketo has excellent suggestions, so you may want to start there. I recommend the following statuses. You can use some of the Purpose ideas for Lead Status Detail to gather additional information about why a Lead was Recycled or Trashed.

Status	Purpose
New/Nurture	Starting default status
MQL	Lead met minimum qualifications to go to Sales.
SAL or Working	Sales Accepted, attempting contact
SQL	Sales qualified – opportunity exists
Converted	Lead is now a Contact or has an Opportunity.
Recycled	Closed/Lost; No Opportunity; Not Ready;
Trash	Bad Info; Not Target Audience

Other Field Changes or Additions

What other fields do you need to help drive your lead lifecycle? Do you have a wishlist of changes already? Now is the time to make those happen.

Standard Smart Lists

Prepare a list of standard Smart Lists, or database queries you will need to drive your lead lifecycle as well as manage various kinds of leads. This topic is covered more in Lead Databases. Here are some suggestions:

- Internal Users: make sure you have sales and marketing register on your system so you can easily filter and suppress internal email addresses from all reports and campaigns.
- Prospects
- Current Customers

- Leads with Product Interest X in the United States.
- Leads by various types: product need, function, region, title, etc.

Marketo SFDC User

Ideally, your firm will have an SFDC Administrator on staff or on call who can work with you to sync the two systems. Get to know them and provide them with this section as well as any documentation you can offer from Marketo.

Salesforce Role and Profile Setup

This section draws on my experiences, Marketo's Salesforce Integration Instructions as well as the [Best Practices for SFDC Integration presentation] by Stephanie Worthington of Coraid, Kim Stites of CPP, and Jep Castelein of Marketo.

You can and should setup a specific Role and Profile for the Marketo User. You can use the Profile to control data access to Marketo, as well as ensure good security practices. Marketo recommends a separate Role, Profile, and User for the sync user. This user should be called "`Marketo User`" so changes Marketo makes are clearly identified on each record.

User Field	What to Call It	Notes
First Name	Marketo	
Last Name	User	
Email	marketo@yourfirm.com	Make sure this is an account or alias someone can monitor.

Required Permissions

Warning: Never allow the Marketo User to have a System Administrator Role or to use a human user's account.

Because it is harder to add permissions and fields later, it is recommended to allow the greatest permissions first, then remove them later as you decide to restrict Marketo's access. You should work with your SFDC Administrator to select the best set of permissions which balance your needs, Marketo's access, and security.

Your Marketo User should have all the [permissions listed in this article] for the Marketo sync to work. Setup a special Profile with Marketing User access.

This includes Read/Create/Edit/Delete on

- Opportunity (Marketo will not write to this)
- Contact
- Lead
- Account

- Campaign
- Tasks

Marketo and the SFDC Sandbox

Salesforce Administrators use the SFDC Sandbox instance to test changes to layouts, fields, and other parts of your SFDC instance. The Sandbox uses real data from your system, but not live data. This is a safe place for you and the SFDC Admin to try things out without affecting real data in the live instance.

If you can, I highly recommend implementing your changes in the SFDC Sandbox and using a Marketo Sandbox account to test out your lead lifecycle

Salesforce and Database Issues

Choose the Right Fields to Sync

Warning: you can never delete a field once it is synced.

Once the sync has begun, Marketo creates a database from the fields and objects it can see. You can never delete fields, so it is important to begin with a minimum number of required fields and then add more later by adjusting the Role Permissions or adding fields in Salesforce.

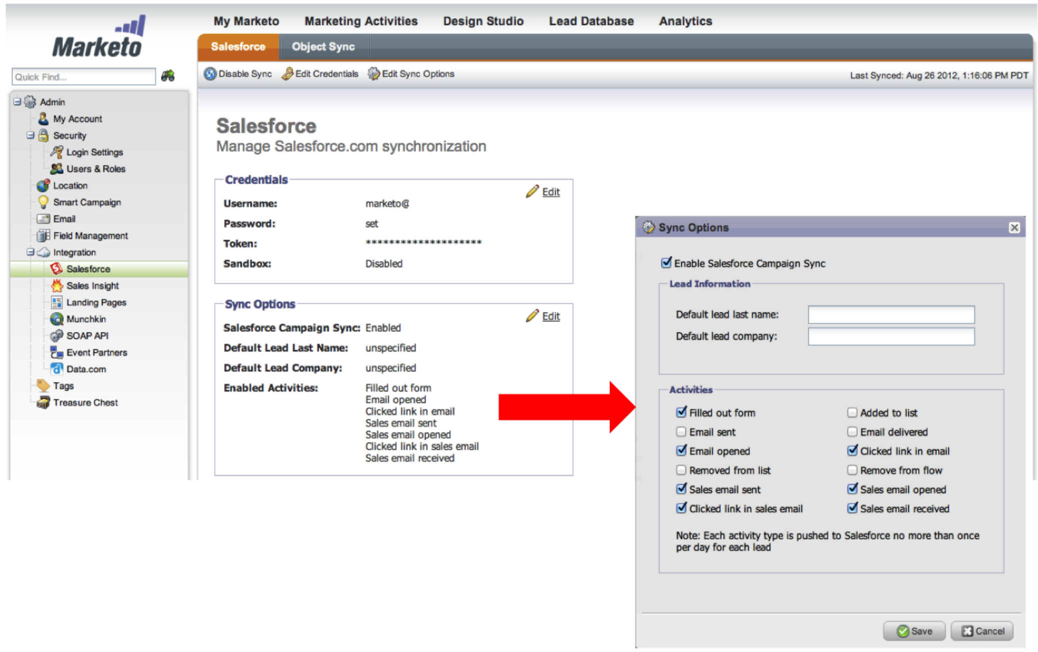
Marketo recommends not including frequently updated fields such as `Data.com Last Updated` or certain system fields.

Warning: SFDC Professional requires fields to be on page layouts to sync.

Salesforce Professional users must include desired fields on the Lead, Contact, Account, and Opportunity layout to ensure the fields appear in Marketo

Sync Activities

Marketo can automatically sync activities such as email sends, opens, clicks and more directly to the Lead's record in Salesforce. I recommend selecting only the minimum number of items because Marketo can record and sync dozens of actions for a Lead which will quickly take up record space in your SFDC Instance. Choose only the most critical, sales oriented Activities to auto sync. If you want to expose other activities, do so using Sales Insight.



SFDC Queues

Many firms use SFDC Queue Owners to hold non Sales Ready Leads. Marketo does not always see the Queue automatically to add it to the Owner list or the Assignment list. If you do not see Queues in the `Sync Lead to SFDC` action, follow these directions.

When Change Owner is logged, the `Owner Name` will be empty since a Queue has no actual name. Because of this, when you use the Owner filters, you can reference Queues will `Lead Owner IS EMPTY`.

Sales Insight and AppExchange

If you have Sales Insight, you should install this after the first Sync is complete. Use these instructions.

Cleaning Up Salesforce

Take this opportunity to clean up Salesforce as much as possible.

Deduplication and Merging

While Marketo includes automatic deduplication by `Email Address`, it does not do this for records prior to your first sync or records that first appear in your CRM. Marketo (and I) highly recommend deduping records before your first sync to have the cleanest and fastest possible setup. Your SFDC Admin can recommend the best method for your business and budget. I recommend DemandTools, ReachForce, and RingLead.

Data Enhancements

You can also work with a firm like Hoover's to do the following:

- Account Hierarchy
- Enhance Account data like Industry, SIC, NAICS, or other blanks.
- Enhance lead records with missing Contact or other fields.
- Delete records: old records of non-customers; bad data; non-engaged leads; Left Company records.

How Marketo Handles Data

Syncing Data

Marketo syncs data every 5 minutes or so depending on the internet connection between Marketo and Salesforce and the number of updates to make.

As a general rule, SFDC Campaigns take longer to sync to Marketo than Marketo Leads to Salesforce.

- Updates data
- History field
- SFDC field update timestamp
- Records SFDC Activities
- Pushes SFDC Activities as part of flow steps
- Updates records
- Merges records as required – only when the email addresses match. Contact/Lead dupe issue
- Field Blocking
- No Email Address No Sync

What Gets Updated

Bi-Directional Updates

Marketo can read and write to the following SFDC Objects in a standard install:

- Leads
- Contacts
- Campaigns

Marketo can only read the following SFDC Objects in a standard install:

- Accounts
- Opportunities
- Custom Objects

Preventing Data Overwrites

You can prevent overwrites of data using either or both of the following methods:

Field Blocking in Marketo

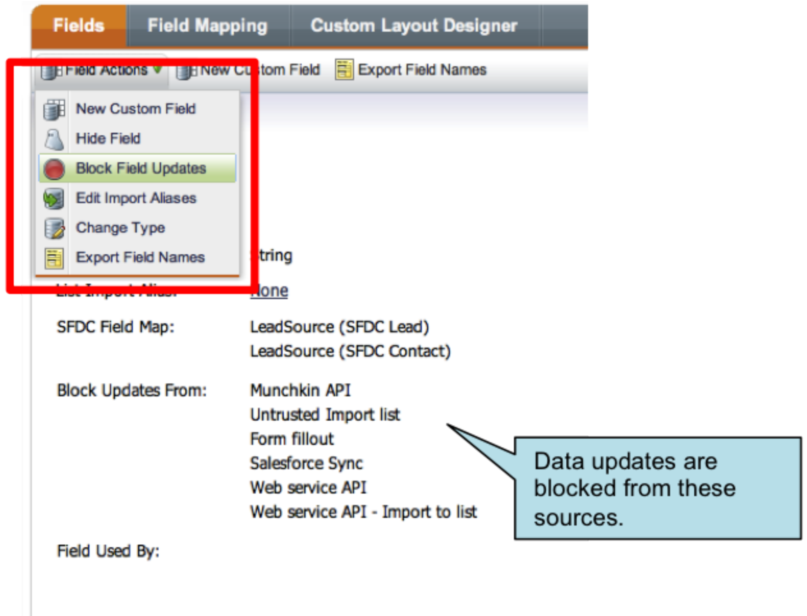
Best Practice: Always Block Lead Source and Original Referrer from updates.

You can and should decide on certain fields Marketo must never overwrite. Most firms will want to block Lead Source and Original Referrer to ensure that when a Lead returns to your system, their original source is saved. Otherwise, it is possible for a Lead that came in from a Trade Show to fill out a form and then say it came in from a Webinar. Clearly this will create inaccuracies in your reports.

Step 1: Go to Admin > Field Management

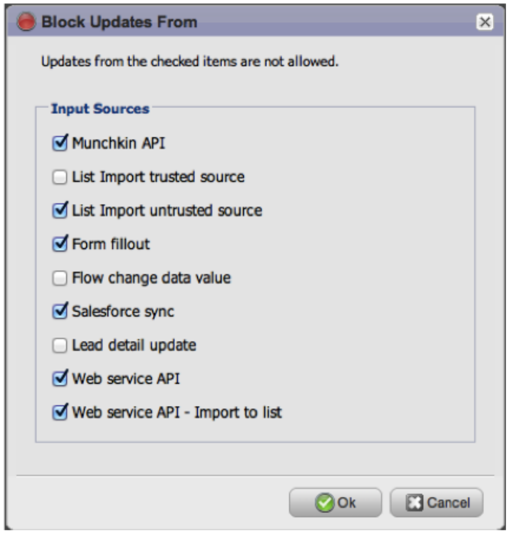
Step 2: Select a field to Block

Step 3: Go to Field Actions > Block Field Updates



Step 4: Select the sources to block updates from

Usually you want to block fields like Lead Source, which should never be overwritten lest you lose the original source channel for a Lead



Step 5: Press Ok

This field can only receive new data if it is blank. Existing data is now protected from updates from the selected sources.

SFDC Role or Permissions in Salesforce

This method uses the Role or User Permission to prevent the Marketo User from "seeing" or accessing certain fields or objects. For instance, if you only want Marketo to read a field, and to never update it, simply use a field level lock from within Salesforce to prevent that Role from writing to that field.

Users of Salesforce Professional will have to remove the field from the Page Layout.

Handling Duplicates

Marketo can automatically dedupe leads based on `email address.` The dedupe works only when you enter new leads into Marketo from:

- List Import
- Marketo Form (iFrame or Marketo Page is ok)
- Direct creation in Marketo database.
- Direct creation through API.

Thus you should do your best to create new leads using the above methods.

How Duplicates Are Created

Of course, people will always create new leads directly in the CRM. These create duplicate records and there are specific rules and situations where this happens.

Lead Duplicates

These usually occur in your CRM or because you are not syncing all Leads to the CRM.

Contact Duplicates

An existing SFDC Contact can force Marketo to create a duplicate Lead if

- Someone created a new SFDC Lead for that email address.
- The Marketo User is not seeing Contacts correctly.
- There were existing SFDC dupes of both record types.

Preventing Duplicates

To prevent duplicates, take the following actions:

- Always use Marketo Forms or the API.
- Sync All Leads to SFDC.
- Import all lists into Marketo using Normal.
- Train Sales SFDC Users to search for leads first using email or Full Name and update an existing record.

Handling Deduplication

Marketo offers a few ways to help you dedupe.

Merge in Marketo

If you use the Merge function in Marketo, the Leads are merged. The activities are merged while the Lead Score is added together. An SFDC Lead will be Converted and attached to an SFDC Contact.

You can also try Marketo's Easy Merge Tool: (Paid).

Merge in Salesforce

If you manually merge SFDC Leads and Contacts, then the usual SFDC rules apply. In Marketo, the two records are merged, the Scores are added together. If the winning lead has a field value of NULL, then that field will be NULL after the merge. Converting a duplicate Lead and attaching it to an existing Contact has a similar result.

The same rules apply if you use a tool like DemandTools for a mass merge.

Stefan Massy at Marketo makes this suggestion:

> One suggestion/precaution I would give is when you do the merge in Salesforce ensure that you are logged into Salesforce with your Marketo sync user. Often times you may be logged in with a Sys Admin (who has full access) and the merge occurs but the issue may be that your Marketo sync user does not have the same permission as the Sys Admin user and your merge may not be reflected in Marketo.

Duplicates, Updates, and Email Permissions

A common question is "If I have duplicates of the same email, can that person continue to be sent emails if just one record is opted-out?" The answer is yes, and no, depending on the situation.

- **How do I know which record will be updated**? Marketo will update the most recently updated record of any group of duplicate Leads. So if you have 5 duplicates and the Lead fills out a new form with a matching email, only the most recently updated record is updated.

Duplicate Records Qualify for the Same Campaign

Sending email to duplicates: if duplicates qualify for the same campaign, Marketo checks for email duplicates and only sends 1 email out. The email activity is attributed to the most recently updated Lead record.

If you have 5 records with the same email address, it is possible for all 5 to qualify for a smart campaign. If this happens, Marketo dedupes based on email address to send only 1 email per email address.

If one of those email addresses is also opted out, then Marketo will not send *any* email to that address.

Your Qualified Count and Blocked Count will not match in this situation.

One Record Qualifies, But Others Do Not

If you have 5 records with the same email address (or even the same person with different email addresses), it is possible only one record will qualify for a campaign.

In this situation, the qualified record could be opted-in, while the others are opted-out, which means the email will go out.

Unsubscribed on One or More Records

Only the most recently updated Lead record will be unsubscribed and it may be possible to send out email if the other subscribed records qualify for a campaign. If both an Unsubscribed and Subscribed Lead qualify for the same campaign, no email will be sent.

Remember that if someone registered with a corporate email and previously with a personal email, those are not duplicate records to Marketo and it is possible to keep sending that person email on either account.

Solutions

Always setup a standard Smart List and static suppression list, which includes all opted-out leads. Be sure to include this list as NOT IN on all email campaigns to exclude all opted-out leads.

Holding Back Leads from SFDC

Generally, new leads, which enter Marketo, do not automatically sync to SFDC unless implicitly or explicitly told to do so through a SFDC flow action. I prefer to sync all data, but doing so requires Queues to avoid sending large amounts of unqualified leads to Sales.

One way to prevent Marketo from re-syncing that group of leads is to remove a value that is required in SFDC. If Company, for instance is not available, SFDC will reject the insertion.

You could also setup a system where a secret SFDC required field is auto turned on for new leads, but set to OFF for those SFDC Is Deleted leads unless you decide otherwise. For instance, if one of these old leads comes back to request something or re-subscribe, then the system resets the SFDC OK field to True, then syncs the lead.

Explicit SFDC Sync

Best Practice: maintain and rely on the SFDC Lead Assignment Rules for assigning new leads.

There is only one way to explicitly sync a lead. Use the flow action `Sync Lead to SFDC`. If someone already owns an existing Lead, Marketo will not change the owner.

The `Auto Assignment` rule is the one set inside Salesforce. You can override this with a specific User/Owner or setup a series of choices based on `Round Robin ID, Random Number`, or other criteria. I highly recommend relying on SFDC Lead Assignment Rules to avoid incorrectly assigned leads or other SFDC errors.

Implicit SFDC Syncs

Best Practice: run Sync to SFDC before other implicit sync flow steps.

There are several implicit syncs in Marketo. I highly recommend using the flow action `Sync Lead to SFDC` before attempting future implicit flow steps. Doing so will ensure the Lead exists in SFDC and is updated before attempting other actions.

An implicit sync flow step tells Marketo to update the Lead as well as take the action desired.

Warning: assigning an existing Contact to a Queue will create a duplicate Lead record.

Change Owner

The `Change Owner` flow step will update Lead or Contact in SFDC. You can assign the Lead/Contact to any SFDC User or Queue.

Add to SFDC Campaign

This action will add the record (Lead or Contact) to the chosen SFDC Campaign with the Member Status you select. The SFDC Campaign should be created *first* so Marketo will see it by the time you are ready to use it. It can take minutes to hours for SFDC Campaigns to appear.

If you add a Lead to a Campaign it is already a member of, Marketo will update the Lead's Member Status or simply skip the step.

Change Status in SFDC Campaign

You can use this on Leads or Contacts. Marketo will update the Lead's Member Status in the chosen campaign. If a Lead was not previously a Member, Marketo will add the Lead to the Campaign with the chosen Status.

Change Progression Status

When used with a Program, Marketo will update the `Progression Status` in Marketo as well as update the `Member Status` in SFDC.

Any Change to a Previously Synced Lead

Any change to a lead, which exists in both systems, will eventually sync to SFDC, however, a manual data change or flow action change will not necessarily result in an instant update to SFDC. If you desire an instant update, use the `Sync to SFDC` action in your campaigns or directly on the Lead in the `Lead Database View`.

Activities and Tasks

Marketo can read, write, and create `Tasks` or `Activities`.

Marketo will sync certain actions it takes on a Lead as an Activity in Salesforce that will appear to Salesforce Users. This feature is helpful if you prefer to not use Marketo Sales Insight or if you wish to definitively record certain types of items on your CRM without relying on Marketo.

If your Lead Lifecycle program includes a service level agreement with Sales or if you want to automatically assign Tasks, you can also use the `Create Task` flow step using Tokens to assign any task to the record owner.

Automatic Activity syncing is controlled by the `Admin > Salesforce Sync` settings. If you are using Sales Insight, Marketo recommends turning all of the Activity Sync off to save bandwidth and space since Sales Insight will show the same data. It's not a bad idea, especially if you have limited SFDC space.

You may, however, want to sync some of the Activities (such as `Email Sent` or `Form Filled Out`) to SFDC as a permanent record external to Marketo. Some sales people also prefer the `Activity History` in SFDC.

Deleting Leads

Deleting in Salesforce

If a Lead (or Contact) is deleted in Salesforce using the Delete button, the Lead *is not* deleted in Marketo. Marketo will note the change as `Lead Is Deleted in Sales = True`, however, Marketo will usually re-sync the Lead to SFDC if the lead is updated inside Marketo.

You can also `Delete Lead from SFDC`. The option is to also permanently delete in Marketo too.

`Delete in Marketo = False` will retain the Lead in Marketo, which may resync it.

`Delete in Marketo = True` will ***permanently delete the lead from both systems***.

Deleting Leads in SFDC from Marketo

You can use the flow action `Delete Lead`, which will then ask you if you also wish to `Delete Lead in Sales=True`.

`Remove from CRM = True will Delete in SFDC too`. The lead will be entirely destroyed.

`Remove from CRM = False` will only delete the Marketo Lead record. The SFDC record will remain, however the Marketo lead tracking data will be destroyed.

Deleting Leads from Both Systems

Use the flow action or button `Delete Lead`. If you select `Remove from CRM = True`, the Lead is entirely removed from **both systems** and is not recoverable.

SFDC Campaigns

Best Practice: Use the New Campaign option in Program Syncs to ensure exact Status matches.

Marketo syncs SFDC Campaigns that are marked Active. It can take a minute to several hours for Marketo to see a new SFDC Campaign, so it is a best practice to create any new campaigns first.

Marketo can also create a SFDC Campaign from the Program Sync tab, and it will setup the Member Statuses to match existing Progression Statuses for that Program.

Caution: you must create the Member Statuses In SFDC or Marketo Programs will not sync statuses correctly.

While Marketo can Add Leads to SFDC Campaigns as well as Change Status in SFDC Campaign, it cannot do much else with Campaign records.

I recommend managing your SFDC Campaigns and hierarchies and proper roll up fields inside Salesforce.

You can now `Create a New SFDC Campaign` from the Program Salesforce Campaign Sync dialog box. The new Campaign will be set to Active with matching Member Statuses. Please note that SFDC Campaigns created this way will not be in a hierarchy.

Account Data and Records

Marketo can read Account fields and data if the Marketo User has permission to do so. Marketo cannot write to these fields. You may use them in Filters, Triggers, and Tokens.

Opportunity Data and Records

Marketo can read Opportunity data. The system can never write or modify Opportunity data. Even RCM and RCA are read only systems to help you understand your pipeline better.

Starting the Sync

Warning: syncing is a unique 1-1 relationship between Marketo and your SFDC instance (OrgID). This can **never be changed** once begun.

I recommend following the directions in Marketo's SFDC Integration Guide. If possible, your SFDC Admin should handle this part of the integration, as it is critical to do this part precisely for the best outcome.

Once you have entered in the SFDC User details, you will be asked to review the database schema. Review it and then `Approve the Schema`. The databases will begin to sync. This could take several hours or even two days depending on the size of your SFDC database.

When the sync is complete, you should (or your SFDC Admin should) adjust the Salesforce Sync and Field Management settings to Sync Activities and Field Block.

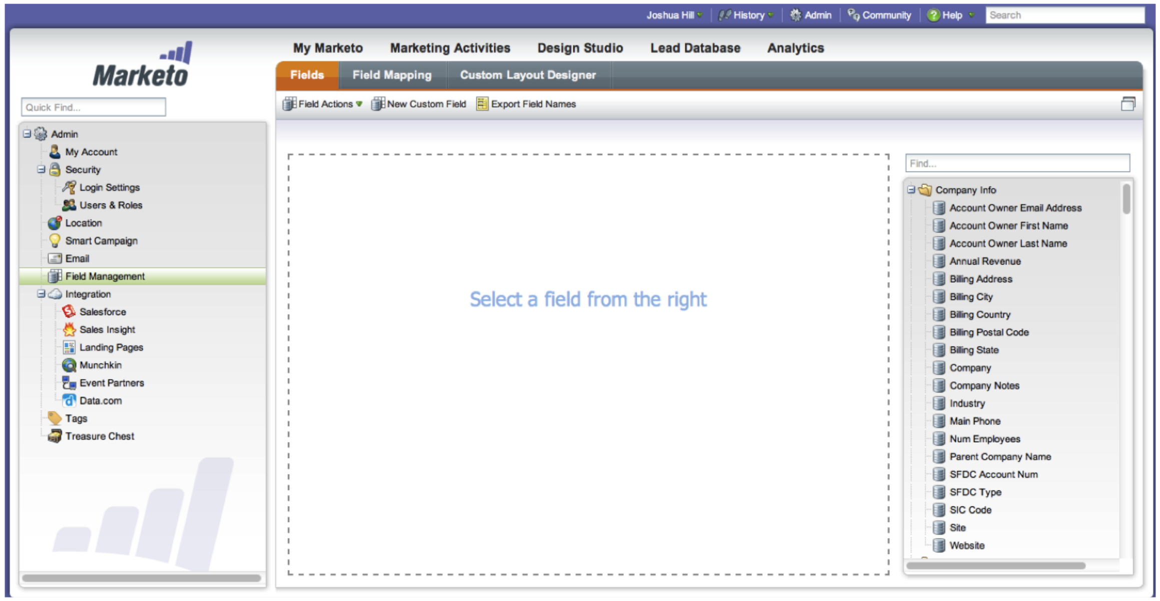
Field Management

Please do not try to do anything in this section unless you have thought through the implications and the steps. Messing up a field is a big mess. Please consult an SFDC or Marketo Admin if you do not feel comfortable here.

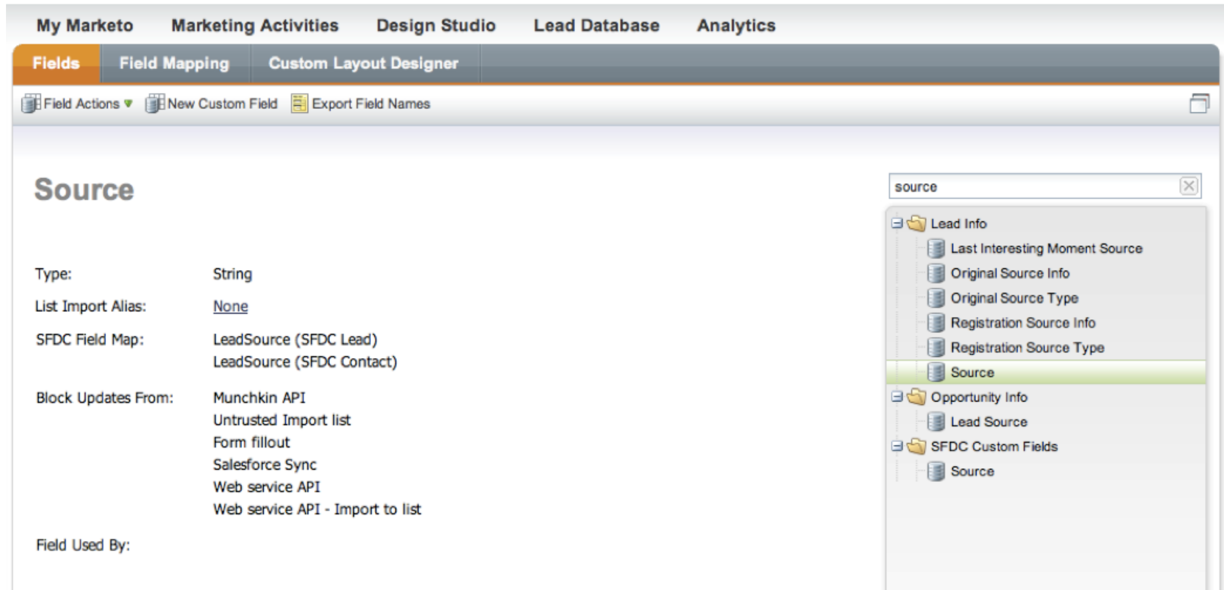
You may be asked to visit [the Field Manager](#) after Marketo reviews the SFDC Database Schema. You must approve the Schema before the data sync continues.

Using the Field Manager

To manage the fields within Marketo, go to `Admin > Field Management`.



Drag any field from the right and you can view its settings.



Field Blocking

This is a useful method of preventing overwrites. See Preventing Overwrites above.

Adding Fields

Best Practice: create new fields in SFDC first so they sync to Marketo.

Every now and then you may need a new field. The field could be needed for any reason. It pays to follow the directions very carefully. You can also view additional directions here.

In Salesforce

The preferred method is to start in SFDC so that Marketo automatically syncs the fields and its data over without further intervention. Please consult with your SFDC Admin on how to do this.

In Marketo Only

You may need a data storage field or other Marketo-only field that is used primarily for lead management. There is no need to have these kinds of fields in SFDC, so you can create them directly within Marketo.

The process is fairly simple, however, do consider the full implications before going ahead.

Step 1: Confirm that you need to create a field instead of using an existing field.

Understand what you will use this field for as a filter, trigger, or temporary storage.

In this situation I need a field to hold a frequently changed text value, which I will use to Trigger a flow designed to Register Leads for different webinars on one form.

Step 2: Consider the Type of Field you need

Since this is a text value, I need a `String` field. You can also use other types of fields which such as `Date`, `Email`, or `Checkbox` (T/F).

To create a picklist, you can use a String like I am doing here and then add the values in the Form Designer.

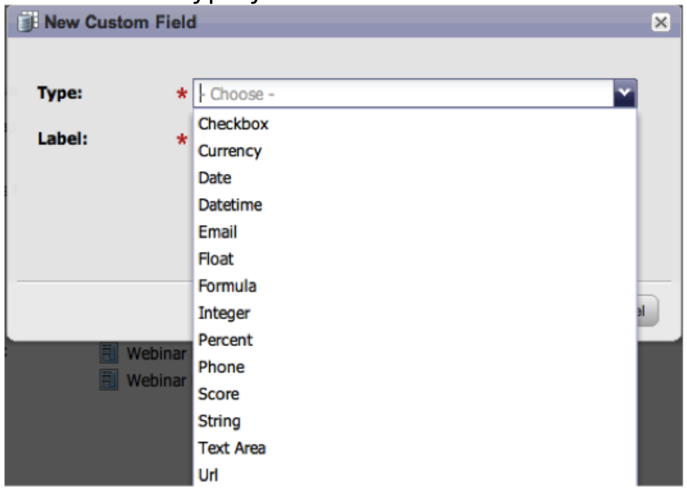
Step 3: Name the Field – Write this down

Make this as simple, yet clear as possible. I chose `Temporary Daily Webinar Date` that tells me this is related to daily webinars and the date of the webinar.

Step 4: Go to Admin > Field Management

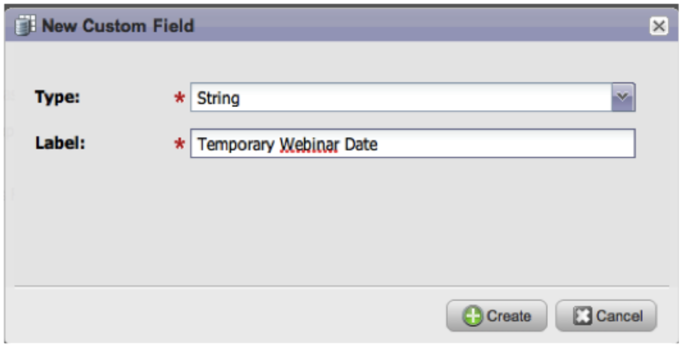
Step 5: Press New Custom Field

Step 6: Select the Field Type you chose earlier



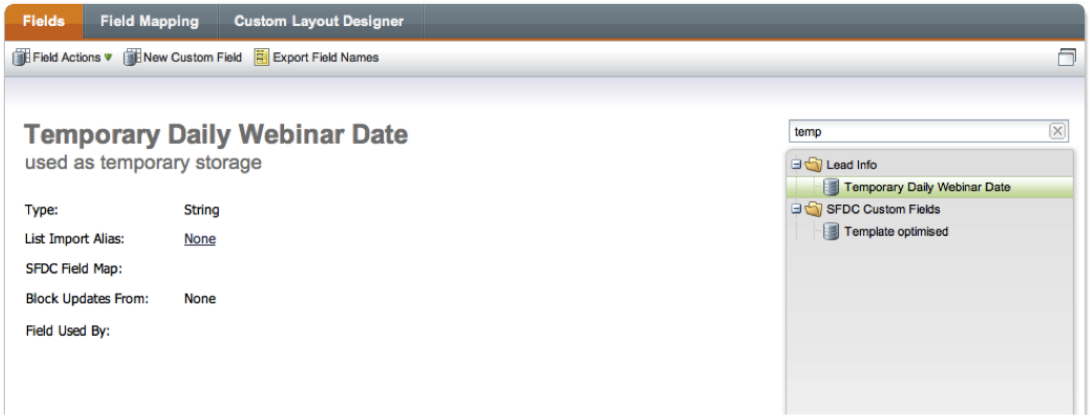
Step 7: Type in the Name you chose earlier

Remember, this is the name you and everyone else will see as a Filter.



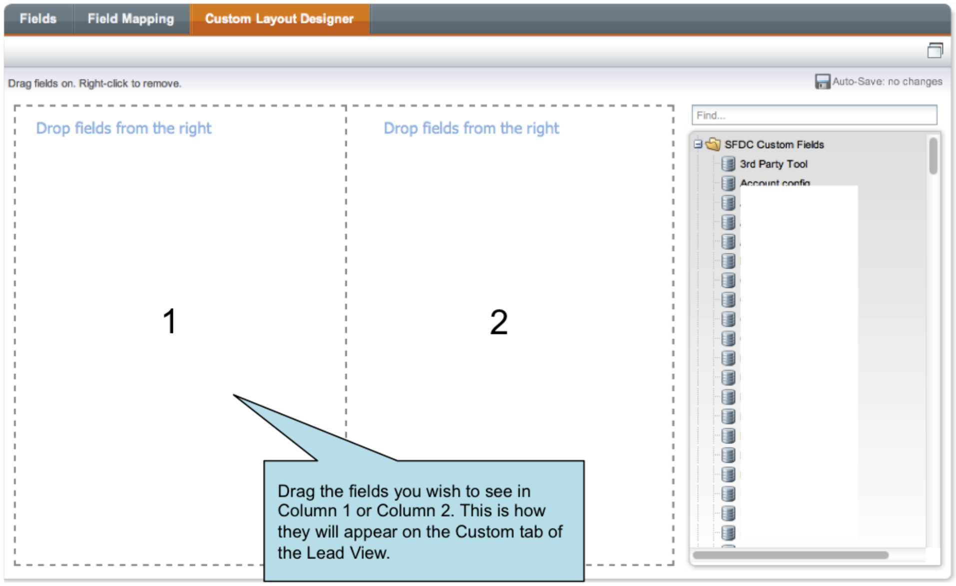
Step 8: Press Create so the field is available

Please note that it may take several minutes for the field to appear in the right field box on the screen here. You may start to see it elsewhere almost immediately.



Create a Custom Lead View Tab

Use the [Custom Layout Designer]() to rebuild the Lead Detail Views you see when looking at individual records in Marketo.



Special Situations

Using Contacts Only

Your firm may use Contacts and Accounts to manage all of your inbound leads instead of Salesforce's Lead to Contact conversion system. To use this system with your Marketo instance requires specific changes:

How to Hide Records from the Marketo User – specifically discusses Leads.

Considerations for going with Contacts only.

Auto Converting Leads to Contacts

This is not recommended due to complications with assigning Accounts, Territories, and Duplicates.

Web to Lead Forms

Caution: records from SFDC W2L forms will not be deduped.

You can continue to use existing W2L forms that you setup in SFDC. The difficulty you will experience is the new leads will be created in SFDC and not deduped by Marketo. Marketo and I recommend migrating all of your forms to Marketo landing page+form combinations as soon as you can.

If you need to do so, the W2L Code field can be synced and used by Marketo as long as it is visible to the Marketo User.

Custom Objects

Caution: the Custom Object must be associated with Leads, Contacts, or Accounts.

Marketo can view custom objects created in Marketo if and only if the Marketo User has permission to view those object. Marketo cannot write to those objects.

Opportunity and Custom Object issue

Custom Objects and Triggers (Marketo Enterprise and Pro only)

Enable Custom Object Sync (Marketo Enterprise and Pro only)

Troubleshooting

Troubleshooting your sync can be easy or extremely difficult. Your first line of defense is to investigate the lead(s) in question, then see if the Marketo User has any permission problems. Here are some common situations.

Field Value Changes in SFDC

Marketo will send all users assigned to Admin Role an email anytime a field value changes that affects active Forms. Usually this is due to a change in a picklist value in Salesforce, however, it may also be due to other changes.

Broken Sync – Marketo User Password/Access

Maintaining a constant link between systems is vital to ensuring a continual stream of information to your Sales teams around the world. Marketo will notify any Admin users if the sync itself breaks. If you receive such a message inside Marketo or in an email, login to both Salesforce and Marketo immediately to view the details.

The most common cause is the expiration of the Marketo User's password or token in Salesforce.

Solution: Immediately reset the password and use the new password in `Marketo > Admin > Salesforce` to restore the sync. **Activities during the unsynced period will not be synced to Salesforce**, although they are still recorded in Marketo.

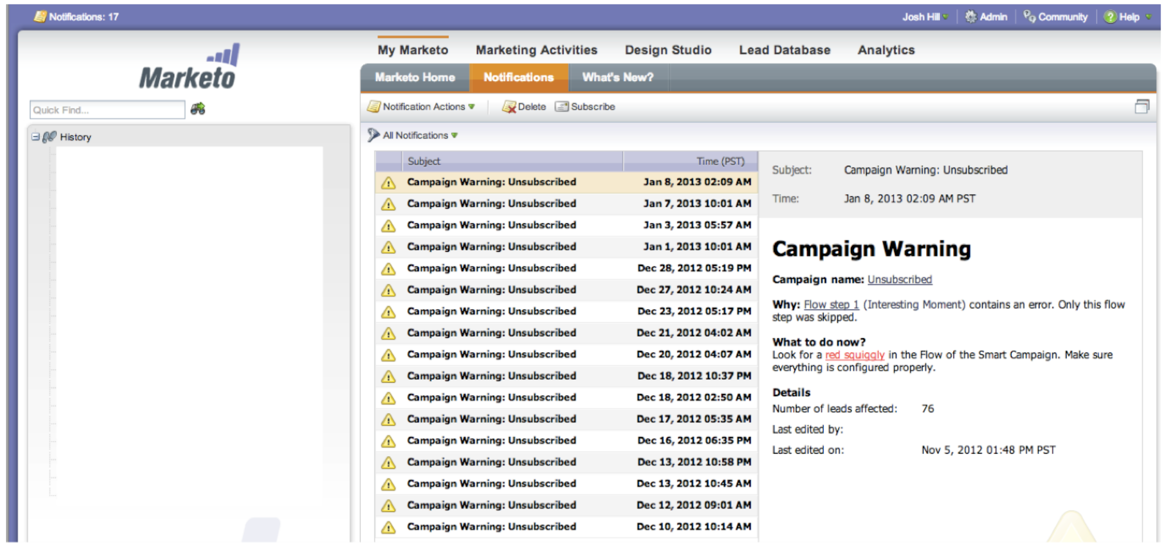
Please remember that the Marketo User should have specific permissions similar to your Marketing Role. Never assign the Marketo User System Administrator privileges in Salesforce.

Campaign Failure

Marketo now notifies Administrators of campaign failures where an entire flow step failed to activate for at least one Lead. Usually these errors are related to the following errors

- Temporary SFDC Sync Failure for any reason.
- SFDC Failed Insert where a Lead failed the minimum requirements to be created.
- Missing information in the Flow Step. This can occur on a triggered campaign where someone accidently deleted the rule after activation.

Immediately check each error message, which will also appear in the upper left corner as "`Notifications`." Then check each affected campaign in detail to determine the cause. If you cannot identify an obvious problem, please call Marketo Support.



SFDC Insert Failed

`SFDC Insert Failed` is a Lead Activity Log item, which appears whenever Marketo was unable to create a Lead inside SFDC. The Description message will usually tell you the exact cause. In almost all cases, the reason is the Lead in Marketo did not meet the minimum requirements to be created inside SFDC. For instance, if SFDC requires Email, Full Name, and Company, but Full Name is missing, SFDC will reject the creation.

In many cases, this error will only appear at the Lead level and can be safely ignored. You will only want Leads created in SFDC when their full details are available to Sales.

You can use this error to prevent leads from being pushed to Salesforce until they are MQL. Do this by telling SFDC to accept Leads only with a specific field that Marketo will use only when your leads are MQL.

Missing Fields

During the initial sync with Salesforce, Marketo will import all fields and object data it has access to via the Marketo User.

Additions or changes to fields in Salesforce will be reflected in Marketo only when the Marketo User has permission to view these fields or objects. For firms with Salesforce Professional Edition this means exposing the needed fields on the Lead/Contact record Page Layouts.

For firms with special objects or other data, you must permit the Marketo User access to the fields in order for Marketo to read or write to those fields as desired.

Creating New Fields

You should always create new fields in Salesforce *first*, then wait for Marketo to sync those fields for optimal results.

If you create a custom field in Marketo, then want to see it inside Salesforce, you will need to contact Marketo Support for assistance. It is fine to create custom fields in Marketo, however, you must follow the above steps if you later wish to view the field in Salesforce.

Changing the Marketo User for the Same SFDC Org

You may need to change the Marketo User from a person's account, to a "Marketo" only account. Or you may have to do this because of the Role Permissions involved. I highly advise planning this out and doing this over a weekend. Keep the original Marketo User available in case the sync fails and you need to restore the old sync.

Step 1: Create a New User for Marketo

To change the Marketo User, you need to setup a new Marketo User in Salesforce with the appropriate permissions.

Step 2: Login to Marketo and go to Admin > Salesforce

Step 3: Change the Salesforce User Settings to the New User

Press save once complete.

Marketo will now use this user's profile to read/write data between the two systems.

You should do this carefully because you may find if the permissions have changed, the data available to Marketo is now slightly different.

Chapter Review

Self-Quiz

What data is always synced?

What is an implicit Sync?

Should you Add to SFDC Campaign before or after Sync Lead to SFDC flow action?

Recommended Resources

Marketo Documentation Marketo

Marketo Setup with SFDC

Professional SFDC Professional Edition Marketo Setup Instructions

Enterprise SFDC Enterprise - Marketo Integration Setup

Marketo Lead Management App Instructions [PDF]

Marketo App in AppExchange [Salesforce]

Required Marketo User Permissions

Marketo Community

Chapter 10. Managing Your Marketo

At a Glance

Overview

Great, you purchased a Marketo License! Now you are on your way toward becoming a Rockstar.

Rockstars, believe it or not, are organized. They leave nothing to chance and they practice disciplined rocking, er, Marketing. Setting up Marketo to function well should be one of your first actions before using the system for your big marketing push.

I promise you a few minutes of thought and careful setup will save you hours and days later.

Naming Schemes

One of the first things Marketo suggests to new users is to devise a naming scheme for your various programs and assets. I agree. I have seen several options over the years and recommend one or more of the following. Please feel free to modify this for your business, but keep in mind the reasons I chose these methods over others.

Keep the name clear and memorable so if you ever leave the firm, others can start where you left off.

Naming is also important because it can help you find assets while you setup filters or triggers. In particular, the creation of Smart List reports and Reports becomes much easier when you can use a filter like

```
Visited Web Page Web Page CONTAINS "webinar"
```

instead of finding every single webinar you want to include. While Marketo does allow searching of names of assets, the functionality is limited because it works best on the first few letters or numbers (which is why dates are so important).

Marketing Campaigns & Programs

For dated activities, I prefer the Leading Date Method:

```
YYYYMMDD Descriptive Name Goes Here
```

`YYYY MM DD Descriptive Name`

Good Example

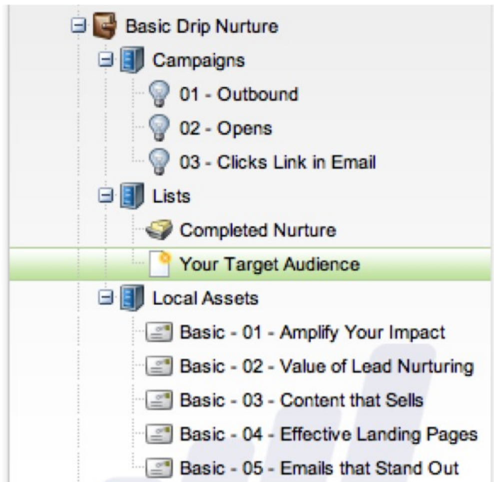
`20122008 TradeShow Las Vegas Attended`

`20120315 Cloudforce SF Lead Swap`

For child campaigns in Programs like a webinar you can also use these:

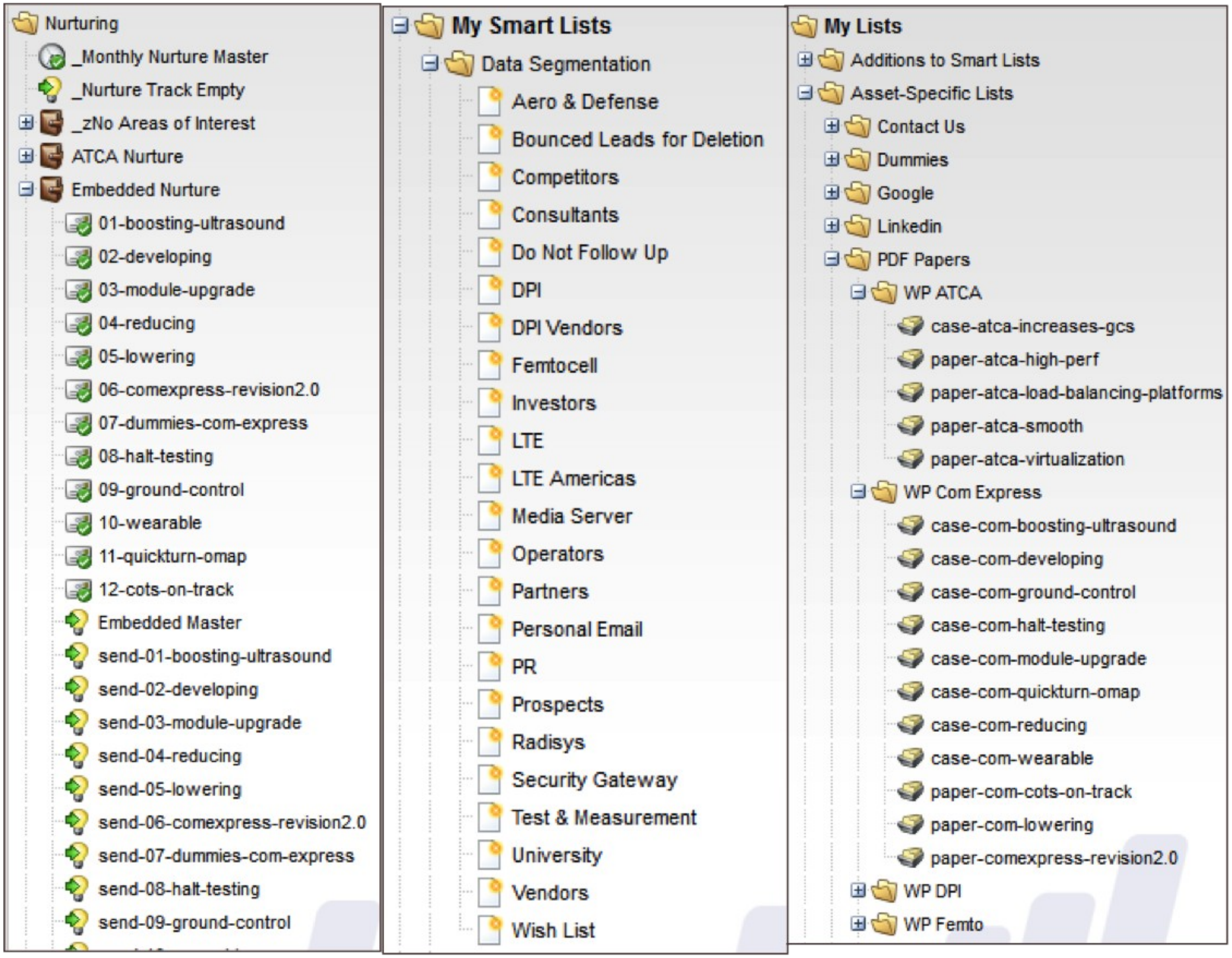
`1 – Invitation Flow`

`2 – Thank You Flow`



The advantage here is you clearly mark the order of steps for your Program. Nurturing, webinars, and events benefit from using a number system.

Another good example is from Brian Wood of Radisys who adapted SEO style naming for his nurturing programs. Note also his clear naming for `Smart Lists` and `Static Lists`.


Nurturing
_Monthly Nurture Master
_Nurture Track Empty
_zNo Areas of Interest
ATCA Nurture
Embedded Nurture
01-boosting-ultrasound
02-developing
03-module-upgrade
04-reducing
05-lowering
06-comexpress-revision2.0
07-dummies-com-express
08-halt-testing
09-ground-control
10-wearable
11-quickturn-omap
12-cots-on-track
Embedded Master
send-01-boosting-ultrasound
send-02-developing
send-03-module-upgrade
send-04-reducing
send-05-lowering
send-06-comexpress-revision2.0
send-07-dummies-com-express
send-08-halt-testing
send-09-ground-control
My Smart Lists
Data Segmentation
Aero & Defense
Bounced Leads for Deletion
Competitors
Consultants
Do Not Follow Up
DPI
DPI Vendors
Femtocell
Investors
LTE
LTE Americas
Media Server
Operators
Partners
Personal Email
PR
Prospects
Radisys
Security Gateway
Test & Measurement
University
Vendors
Wish List
My Lists
Additions to Smart Lists
Asset-Specific Lists
Contact Us
Dummies
Google
Linkedin
PDF Papers
WP ATCA
case-atca-increases-gcs
paper-atca-high-perf
paper-atca-load-balancing-platforms
paper-atca-smooth
paper-atca-virtualization
WP Com Express
case-com-boosting-ultrasound
case-com-developing
case-com-ground-control
case-com-halt-testing
case-com-module-upgrade
case-com-quickturn-omap
case-com-reducing
case-com-wearable
paper-com-cots-on-track
paper-com-lowering
paper-comexpress-revision2.0
WP DPI
WP Femto

Bad Examples (Don't do this!):

`Trade   Show Las Vegas-Upload May 13`

`May 12 2020 Social Rock Attended – JDH`

`12202011_My List Created By Joe`

`Under_scores_are_unneccessary_and_break_search`

It's true; any dashes should have a space. Underscores are totally unnecessary because they break the search function on each section. For instance, if you type in

`Use Trade` to find any trade show, Marketo will ignore any names like `Trade_Show_2010`

Data Management and Lead Scoring

These campaigns manage data changes and are not inherently dated campaigns. I recommend names to be specific about what they do and when.

`CXO Title Scoring for Product X`

`White Paper Scoring – Batch`

`White Paper Scoring - Triggered`

`Inactive Leads – 30 Days`

`Lead Source Changer – PPC to AdWords`

`Employment Range Fixer – (10-19) to (Under 20)`

Emails

Email Templates should have a name such as

`EIU Event Template 2012 – Approved`

`IBM AdWords Template 2012 – Approved`

Emails are dated material and should always used the leading date method:

```
YYYYMMDD – Tim Geithner Webinar Invitation
```

```
20120922 – Best Guide to Industry Ever Promotion
```

One exception is for Sales Alerts. Most firms use one of these schemes:

```
Alert – Lead Assigned to You
```

```
Sales Alert – Lead Revived by Nurturing
```

Landing Pages

Landing Pages are special cases because they also include URL slugs for SEO.

Marketo Name: names for Development and Approved Production Pages

Naming for Templates Under Development:

```
Template 1 Column – 2012 – Testing
```

Naming for Templates Permitted for Use:

```
Template 1 Column – 2012 – Approved
```

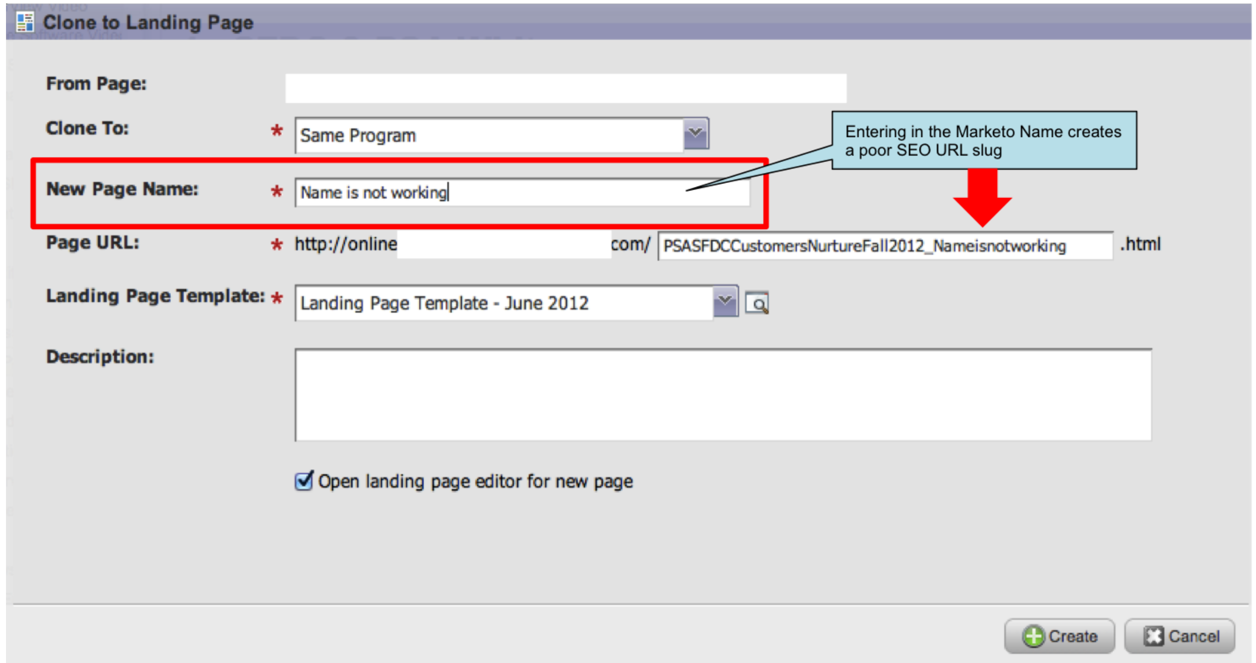
Another method, pioneered by Eric Hollebone, is to use all lowercase titles with dashes. Doing so aligns the Marketo Name and SEO Slug as well as allows Marketo's search function to operate better.

```
Descriptive-name-is-great
```

```
20120922-industry-webinar-registration
```

Search Engine Optimized Name

SEO is an entire industry in its own right, so this is a short recommendation on SEO in Marketo because I see almost no one properly handling this. When you first create a new Landing Page and start to type in the Marketo Name, Marketo automatically uses this text in the page slug. This is wrong.



Go to the Landing Page Slug and change the name immediately. I recommend doing this right the first time, but you can always use URL Tools to adjust it later. The name should always look something like this:

`http://go.yoursite.com/[PAGE SLUG]`

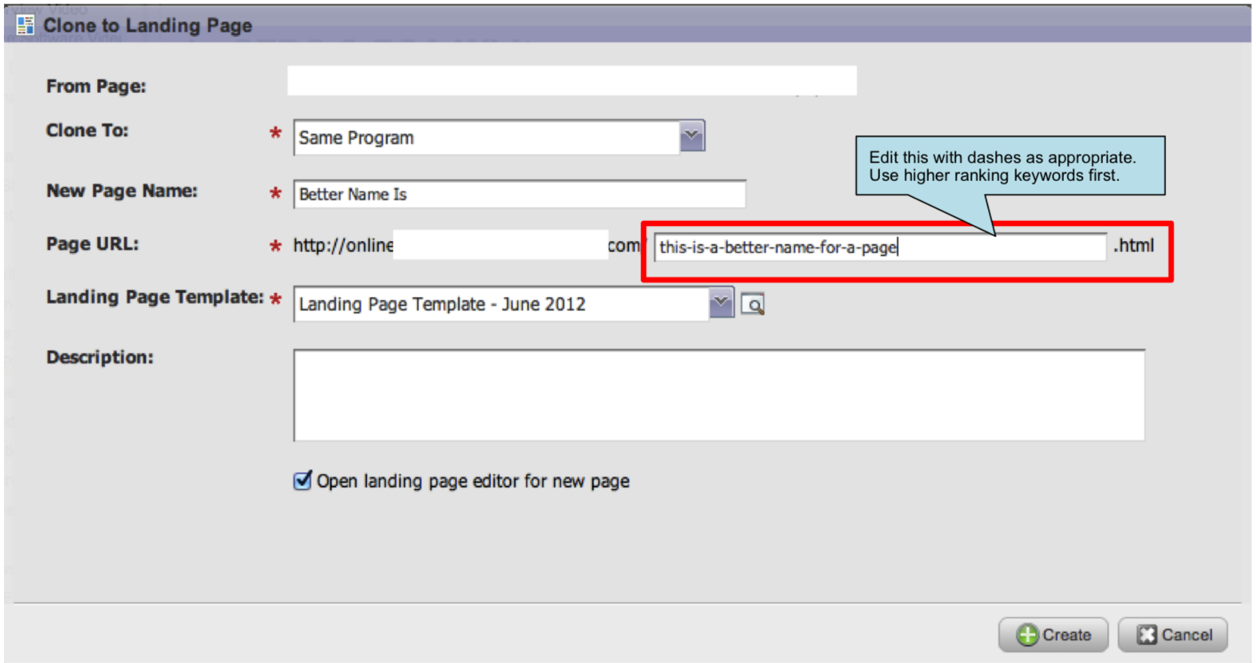
`http://go.yoursite.com/how-to-use-marketo-forms-webinar-20120922.html`

Do not use

`20120922 Dreamforce Party Test 2` because that becomes

`http://go.yoursite.com/20120922DreamforcePartyTest2.html`

The dashes are critical because this is the standard way Google and Bing expect to parse keywords. A few tips I've learned are [here](), but keep in mind that your SEO agency or SEM/SEO Manager should handle SEO.



1. Keep important words at the start of the page slug just like you would work with a sentence or paragraph with *Strunk & White.*
2. Keep names in lowercase.
3. Use keywords in the page slug and make sure those keywords appear in the copy. For instance a page selling economic data should have the slug `Russia-economic-data-forecast-2015`.
4. Remember people do look at URLs in text emails and in the browser bar just as much as computers do. Having a poorly worded slug or a sinister sounding slug will not help you gain trust. For instance, AB Testing requires two pages, so it is good to make sure your Test Group URL and Page Slugs are not obviously testing something.

Forms

Caution: Do not make Forms inside Programs. You'll see why later.

Naming forms is simple since you should have a limited number of forms you can re-use for various purposes.

`JDH Standard Form` (this is the form I usually use)

`JDH PPC Form` (special form with code to help track PPC info)

`JDH Live Event Form` (live events require different registration detail)

`JDH Webinar Form` (short form for webinar sign ups)

You can use the Leading Date Method here, however, you should almost never need to create a date specific form.

Smart Lists

Smart Lists require more description than dates, although you are welcome to use Leading Dates especially if you were using the smart list as a report substitute.

Since you will use many of these lists across the system, be sure to be clear when naming them so they will be easier to search for, and to select.

`Descriptive Name - Special Criteria`

Good Examples:

`Test Names Exclude List`

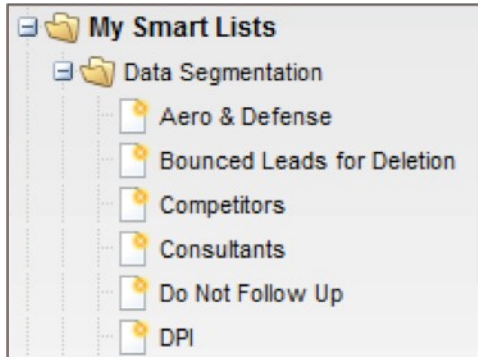
`House Suppression List`

`Customers by Product – Product 1`

`Blank Country and UK`

`Lead Activity in Past 6 Months`

`20120214 Valentine's Day Contacts`



Bad Examples

`MKTO Filter 1`

`Inferred Product interest-UIJ`

`My List 26`

Lists

Static Lists have many uses in the Lead Database as well as local Lists in Programs. Sine we also use Static Lists as upload tools, it is vital to use Leading Date so you and others know the original upload time. If you discover an error later, or just want to keep track of files, this is the best way.

In the Lead Database:

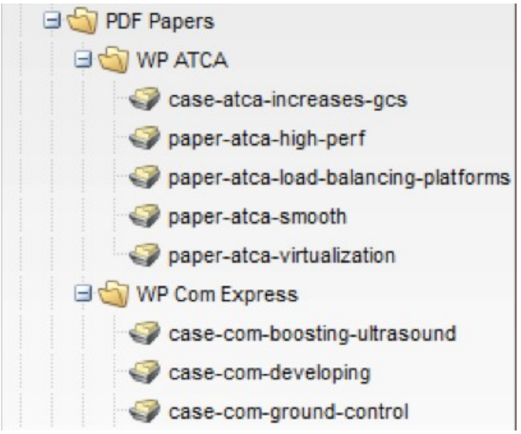
`YYYYMMDD Descriptive Name`

`[Date of Upload/Event] Descriptive Name`

Good Example:

`20122008 Trade Show Las Vegas Attended`

`20120315 Cloudforce SF Lead Swap`



Bad Examples (Don't do this!):

`TradeShow_Las Vegas-Upload May 13`

`May 12 2020 Social Rock Attended – JDH`

`12202011_My List Created By Joe`

In a Program:

`Descriptive Name List` so it appears as `Program Name.Descriptive Name List`

Since we will use local lists to build Nurturing Programs, using the right naming scheme is vital.

Reports

Reports in Analytics can be named in a similar fashion to Smart Lists or Static Lists.

`Descriptive Name`

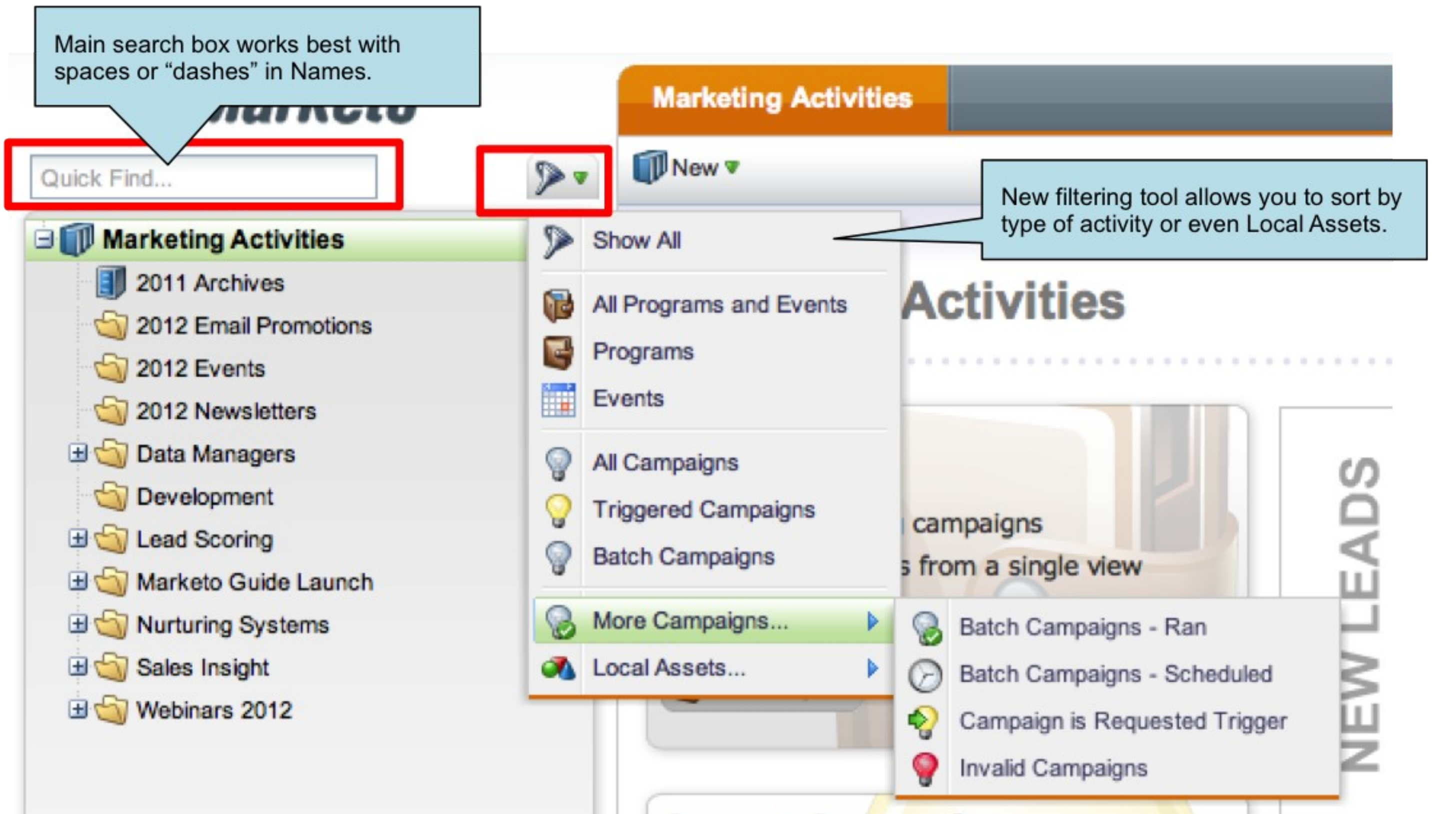
`YYYYMMDD – Descriptive Name`

`Leads by Month – Webinars`

`PPC Landing Page Activity – Past 180 Days`

Search Tools

Marketo recently updated the search tools on Marketing Activities, Design Studio, Lead Database, and Analytics to allow you to find by type of item, not just name. If you adopted a clear naming scheme, as described above, your Search box and filtering tools should help you even more.



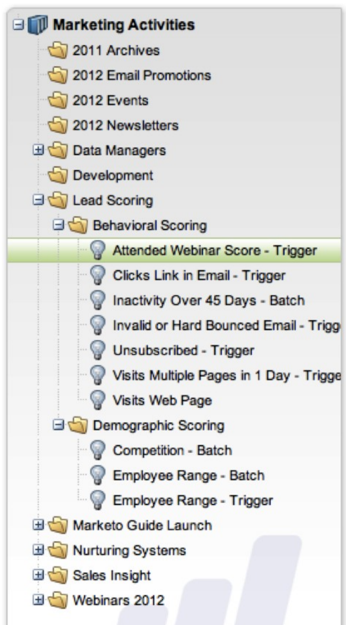
Organization of Folders

Folder organization is important because some people will need to go through the folder tree. The other key reason is many Reports, such as Campaign or Program Reports, use the Folder Tree Selector to choose groups of campaigns to report on. If you set this up correctly, it will be much easier to choose the right data.

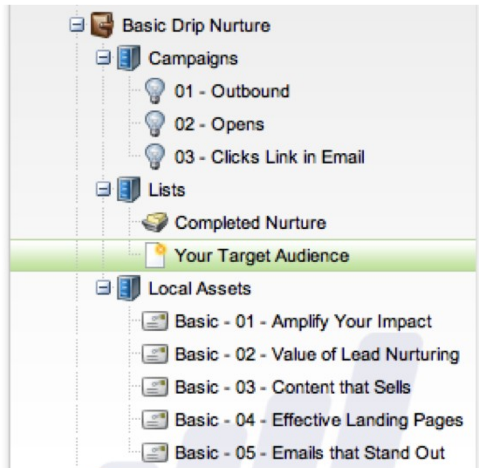
*There is a known issue where you can create a deep folder structure, but when cloning, Marketo will only show you 1 level deep. Do not be deterred by this minor bug; just get your structure right.

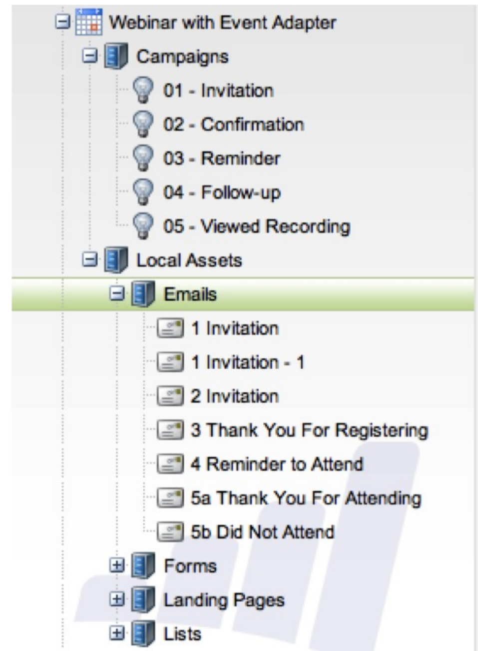
Marketing Activities

Since this is your main work area for your team, it is vital to decide on a solid naming scheme before getting too far. Marketo's initial setup is a good starting point. Here are a few suggestions for you. This is an overview of how you might organize your folders overall:



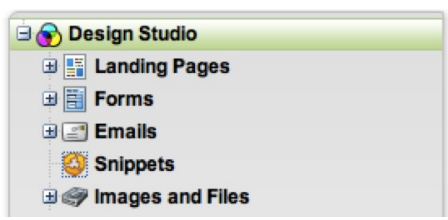
for Programs, you might follow Marketo's new template system, or create your own. Marketo's approach works well as a starting point. I usually use a similar system, grouping Local Assets by Type and Campaigns together with a numbering system.





Design Studio

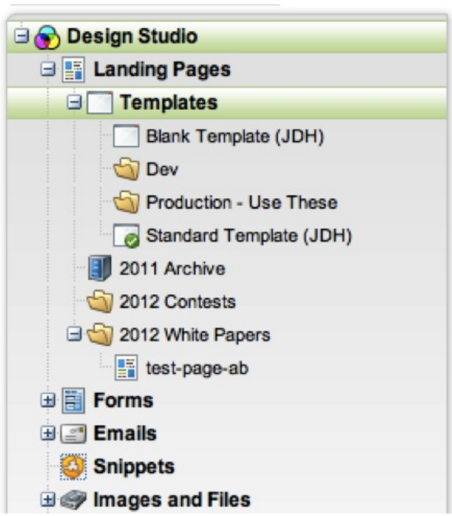
Design Studio has 5 areas, two of which have Templates, which are seen across the system. When collapsed, this is how your Design Studio looks.



Landing Page Folders

I recommend creating a `Dev` and `Production` section for your Templates. Train your team to use the Production Templates and to name Dev and Production Templates differently to avoid confusion.

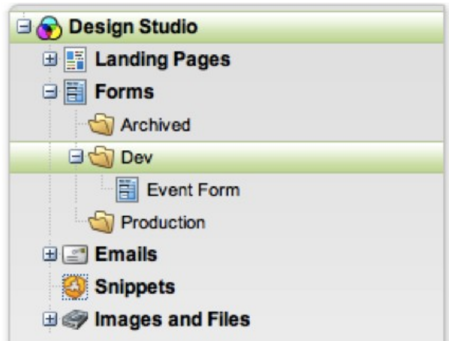
For other pages, I use `Year – Subject` or `Year – Channel` most of the time.



You can also create a series of `Archive` folders for deactivated pages.

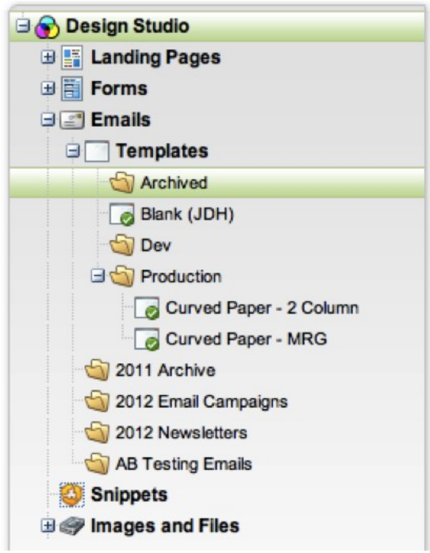
Form Folders

Forms require just `Archived`, `Dev`, and `Production`. Again, remember to name Dev and Production Forms differently so they are distinguished in the other menus.



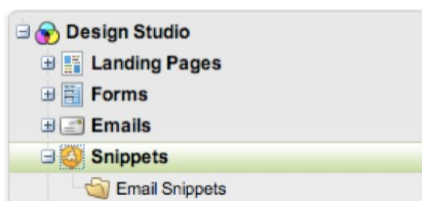
Emails Folders

Emails are similar to Landing Pages. You may have more channel or dated folders. Don't forget Sales Insight and Alerts if you use them.



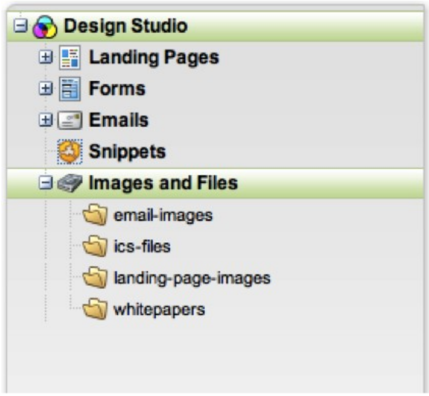
Snippets

Snippets can also use folders.



Images and Files

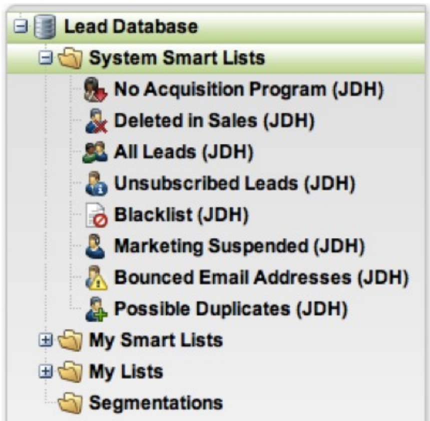
You should create a folder list like these so images and files are easier to organize. These folder names do not impact actual URLs, but I like to use the SEO naming method here anyway.


Design Studio
Landing Pages
Forms
Emails
Snippets
Images and Files
email-images
ics-files
landing-page-images
whitepapers

Lead Database

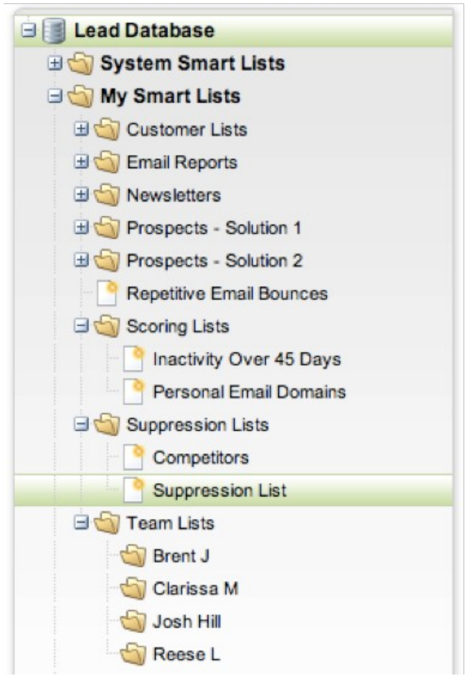
Lead Database also ends up being the most disorganized very quickly. One tip I learned from Marketo is to use topic and Username folders to organize both kinds of lists. For instance, you may have universal lists driving newsletters or Customers, or even lead scoring. You should place those lists in one place whenever possible. The other kind of list is created on the fly for a report, or someone builds a campaign that uses that list.

System Smart Lists cannot be changed.



Smart Lists

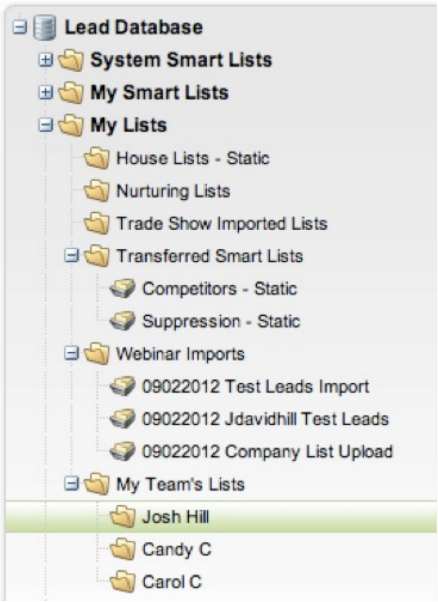
Here is an example of a Subject and Team Name folder system.



My Lists (Static Lists)

The same rule applies here because you will have these scenarios:

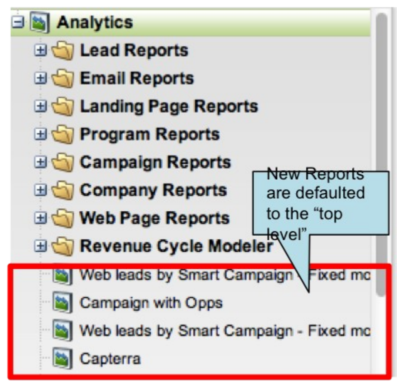
- Someone who uploads a series of lists.
- Lists uploaded for a campaign
- “System Lists” created by campaigns to make counts run faster.

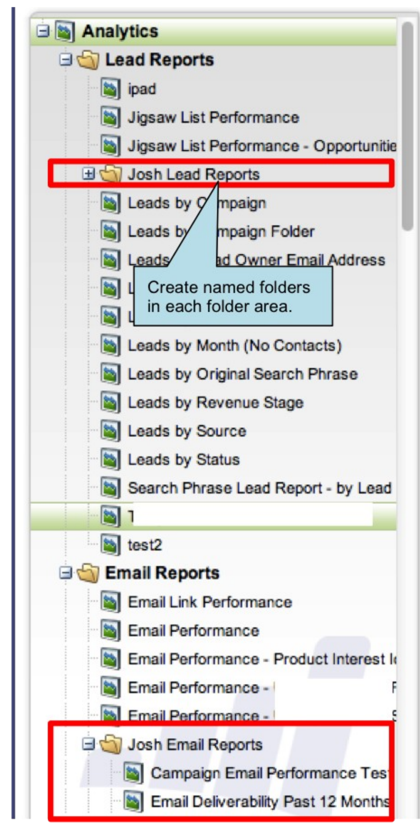


Analytics

The Analytics report folders contain the default reports and each type of report can live in its section or it can live at the top folder. Since you can only create sub-folders of the report type folders, keeping custom reports at the top level quickly makes a big mess.

I recommend creating User only sub-folders for each report section. You can still use search to find these reports, but organizationally you will find it easier if each user keeps her reports in her user folder. Why? Because you will probably ask a person for a report and that person will become responsible for just that report.





Archiving Assets and Campaigns

Caution: archived, activated trigger campaigns are still active.

You can also Archive old assets of any type using the Archive feature of folders. Once a folder, program, asset, or campaign is inside an Archive, it is no longer visible to Search and it looks all filed away ☺ Do keep in mind Archived campaigns are not deactivated. The logic will still work, so if you plan to archive an active campaign, you should consider deactivating it first.

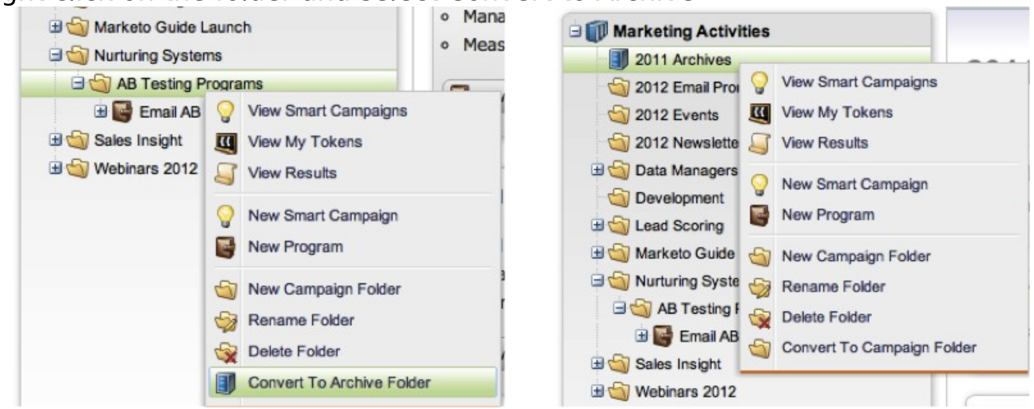
Here is a summary of what happens when something is Archived:

What Changes	What Does Not Change
Asset is no longer visible in search. Results will return the collapsed Archive folder.	Global search still searches Archived folders.
Assets no longer appear in auto suggest.	Active trigger campaigns are still active.
Templates are no longer available across the system for new assets.	Data is available in reports.
Pages cannot be added to new Landing Page Tests.	Filters in Analytics will still see the archived asset.
Sub-folders are also archived (and vice-versa).	
Archived sub-folders cannot be un-archived unless parent folder is un-archived.	

To create an Archive, follow these steps:

Step 1: Create a folder named Archive – Campaigns

Step 2: Right click on the folder and select Convert to Archive



Step 3: Move assets or other folders to this Archive – Campaigns Folder

Step 4: Optional: convert sub-folders to archive

I recommend creating an Archive Folder in Marketing Activities, and each section of Design Studio.

Deactivating Old Things

“But it’s still good!” - Grandpa

As I work with different clients, I encounter users with newer instances and users with older instances. In each case, both compile a legacy of active triggers, scheduled batches, and old assets. These collected items make it harder to see what is *currently* important and what is safe to remove.

You may have pages with old offers still visible online to people. Pages and emails may have old branding or addresses listed. Your new intern may have found that great offer from 2009 to resend to 10,000 people—except that Forrester report is from 2008 and no one cares.

Don’t let this happen to you. Establish a regular procedure for deactivating and unapproving old stuff.

Turn off Triggers and Batches

When	What	Procedure
After Every Webinar	Webinars:	After every webinar, turn off Registration flows. If you switch to an On-demand trigger campaign, set that up now.
After Events	Events	Turn off party or roadshow registrations whenever you reach capacity, or the day of the event.
Quarterly	Data Management campaigns	Review to see if the flow is still required and it is functioning properly.
Quarterly	Autoresponders	Review content and turn off unnecessary flows.
Quarterly	Lead Scoring	Review to see if the flow is still required and it is functioning properly.
Monthly	Lead Scoring MQL	Adjust threshold as needed.

Unapprove Old Assets

Old emails, pages, and lists can clutter up things and eventually confuse people. Once a year (or twice), hold a clean up day with pizza and just get it done.

When	What	Procedure
Every 2 Months	Emails	Remove unused or test emails.
Every 2 Months	Pages	Remove unused or test landing pages
Every 6 months	Pages	Review pages and offers; turn off ones that are stale.
Every 12 months	Templates	Review templates for updates to your site and styles. Unapprove templates no longer used or Archive them.
Every 12 Months	Forms	Archive or delete stale forms. Unused Forms can be deleted.
Every 6 Months	Smart Lists	Clean up the Smart List folders. Look at the Used by tab to help remove unused lists or move them to a more logical location.
Every 6 Months	Static Lists	Carefully review lists and delete ones that are no longer useful for reporting or flows. Deleting a list *does not do anything to the Leads in the list.*

I wrote a few other tips on the blog, where I recommend to always default to Not Publish to Sales Insight. This will save your Sales Team from being confused by hundreds of emails.

Chapter Review

Self-Quiz

Archived campaigns can still be visible in Reports: True or False?

___

Organizing Folders is a …

___

Deleting an asset or campaign is A. Permannent B. Recoverable C. Cannot be done.

___

Recommended Resources

Marketo Documentation

[Archiving Anonymous Leads after 90 Days]

[More on Archiving Inactive Anonymous Leads]

[Sales Insight Email Folder Organization]

[Archiving Assets]

Marketo Community

Email Templates

Opt Out of Archiving anonymous leads after 90 days

Data Counts and Anonymous Leads Archiving

Advanced Nurturing Deep Dive 2012 with Brian Wood of Radisys

Create Folders in RCA – Idea

Design Studio Folder Level Limitation

Programs and archiving

Experts

SEOmoz Beginners Guide to SEO

A Marketo Filters and Flows Text Notation Method – Josh Hill

Chapter 11. How to Build a Lead Scoring System

At a Glance

Overview

This guide assumes you are already convinced you should do lead scoring. Maybe you read the Definitive Guide to Lead Scoring among other papers and guides. Your big question now is "How do I make it happen?" If you are already using scoring, perhaps you are wondering "How can I make it more useful?" This section aims to answer those questions, providing practical tools to move you forward.

Best Practice: Use Scoring as part of a Lead Lifecycle System to gain its real benefits.

Lead scoring alone cannot achieve anything on its own. You must use this as part of a larger Lead Lifecycle System where you hold and nurture leads before passing them to Sales.

A Word on Naming and Organization

I recommend following the earlier suggestions on the folder structure, list names, and smart campaign names.

Folders should be clearly marked for the major kinds of scoring:

Score flows can have names like

`Maneki-neko Interest Score – Batch`

`Product 2 - Employee Range – Trigger`

`Search Term Keywords Scoring – One Time`

You should avoid names like

`Search Phrase Scoring +20` (because you may change the score later)

`Whitepaper 1 score`

Creating the Scoring Model: Ask Sales

The Lead Scoring Survey is designed to keep marketing engaged with Sales.

Instead of basing your lead scores on what you think you know, just ask your sales team! You should use their relative rankings, especially of behaviors, as a basis for the scores you put into Marketo. Once complete, you should back test scores against Won and Lost opportunity data if possible.

The survey is designed to elicit Sales' relative ranking of individual demographics and behaviors to program into the lead scoring system. The idea behind the "likelihood to call ranking" is to discover how excited each sales person in your firm is to call an organization, title, department, function, etc.… based entirely on a single criteria.

I want to point out that you should include positive and negative demographics and behaviors because you will program both into Marketo. Some negative behaviors may not be as negative as you think for the Sales team. Sales will also rank both so you have a full spectrum from the worst leads to avoid to the best leads to pass on. If you want to achieve sales-marketing harmony, then listen to what Sales says.

Lead scoring in automation can only help you on a single criterion at a time. How you weight those actions or criteria determines the total lead score at any given time. Marketo's Definitive Guide to Lead Scoring can help you further.

Sources of Data

There are several methods to use when developing a lead scoring system. Depending on the time you have and how you plan to use lead scoring, you will want to use one or all of these tools as you refine the system.

- Analyze the data from Won and Lost Opportunities to determine common traits of each.
- Analyze rejected lead data to determine negative scoring possibilities as well as missed opportunities.
- Buyer Personas: If you already have these established, use the positive criteria to build the scores.
- Sales Funnel Stages: if you have an established funnel, or at least TOFU (top of funnel) staging set up, the use that to score certain behaviors.
- The Smoke Filled Room: you, your Marketing VP, and the Sales VP have a meeting and use anecdotes to create a rough system. This might be good as a start before a Focus Group or Survey.
- Conduct a Focus Group of the nearest sales people you can grab. Salespeople tell stories to each other all the time, so they do have a good sense for what works. Ask them to differentiate between their ideal "Buy Now random request" and "Real Prospects who need to be sold."
- Survey Your Sales Team. They are on the front lines; they hear the stories of your customers. Find out what sales wants to hear from your customers.

Sales Focus Group Method

You are a marketer, so you know how to do a focus group, right? Just bring together your sales team for a session about what they want to know about leads and what things indicate a strong likelihood of a sale. During the meeting, resist the temptation to use your marketing knowledge. Just ask a few questions like

- What words do hot prospects use?
- What gets you excited to call someone back?
- How do you feel about leads from webinars?
- Who is buying these days?
- What kinds of people might buy, but are not ready?
- Whom do you definitely not want to speak to?

If you must, use this information to construct a relative ranking of demographic and behavioral criteria you can then plug into Marketo. Remember, you can always change it as you learn what works. The best way to use the focus group is as a basis for a larger survey where you can analyze real data from the entire sales team. This is especially helpful with multi-product or global sales teams.

Remember to include "Call Now" triggers such as free trials, Contact Us forms, or demo requests. Most marketers assign +15 or +20 points to these behaviors because the lead is "raising her hand." Make sure you have an established process for handling direct requests and that you automate some of that process in Marketo.

Sales Team Survey Method

The Likelihood to Call Ranking

I believe this is the best way to keep Marketing engaged with Sales. Instead of basing your lead scores on what you *think* you know; just *ask* your sales team! You should use their relative rankings, especially of behaviors, as a basis for the scores you put into Marketo. Once complete, you should back test scores against Won and Lost opportunity data if possible.

The survey is designed to elicit Sales' relative ranking of individual demographics and behaviors to program into the lead scoring system. The idea behind the "likelihood to call ranking" is to discover how excited each sales person in your firm is to call an organization, title, department, function, etc.… based *entirely on a single criterion*.

I want to point out that you should include positive and negative demographics and behaviors because you will program both into Marketo. Some negative behaviors may not be as negative as you think for the Sales team. Sales will also rank both so you have a full spectrum from the worst leads to avoid to the best leads to pass on. If you want to achieve sales-marketing harmony, then listen to what Sales says.

Lead scoring in automation can only help you on a single criterion at a time. How you weight those actions or criteria determines the total lead score at any given time. Marketo's Definitive Guide to Lead Scoring can help you further.

Please adjust these questions to your industry or organization's needs. [Download Now]

1. Which sales team are you on?
   - ❑ Federal
   - ❑ Americas - Regular
   - ❑ Americas – Consulting
   - ❑ EMEA
   - ❑ Asia
2. Describe your ideal lead? [full text] [For a qualitative narrative that may capture additional thoughts]
3. Whom are you expected to call on? [industry, titles, departments?]

4. How likely would you be to call on [Airline] industry?
   - ❑ Never
   - ❑ Might Not Call
   - ❑ Maybe Call
   - ❑ Likely to call
   - ❑ Call Immediately

   *Most of your likelihood questions should be on a 1-5 scale similar to the above.

5. Based only on a person's title or function, how likely would you be to contact the following people by Title or Functional area?

   You may have to do this for each department or title group or for each industry. Example:
   - ❑ Chief Executive Officer
   - ❑ CTO
   - ❑ CIO
   - ❑ Vice President
   - ❑ Director
   - ❑ Manager

6. Based only on a Financial Firm's Assets Under Management, how likely would you be to contact them?
   - ❑ Under $100MM
   - ❑ $100MM-$500MM
   - ❑ $500MM - $1B
   - ❑ $1B-10B
   - ❑ $10B-$50B

   This is how a question might look on paper or in SurveyMonkey.

Question 6 (For each row, select one choice)	1 – Never	2 – Might Not Call	3 – Maybe Call	4 – Likely to Call	5 – Call
Under $100MM	✔				
$100MM-$500MM		✔			
$500MM - $1B		✔			
$1B-10B					✔
$10B-$50B					✔

7. Based only on a person's title, how likely would you be to contact the following titles?

8. Based only a company's annual revenues, how likely would you be to contact them?

9. Based only on a person's functional department, how likely would you be to contact them?

I want to pause here and recommend that you include Firm Size, Titles, Industries, and Functions that you know are unlikely to be called on or even targeted. Your goal is to gather intelligence and build a relative ranking scale to inform the lead scoring. If you just score on the best criteria, then you will never be able to manage bad or not ready leads properly.

10. Taking each of the following actions on its own, how would you rate the action as an indication of a prospect's readiness for a sales call?
    - ❑ Never ready
    - ❑ Not ready
    - ❑ Needs more activity
    - ❑ Ready
    - ❑ Very ready

11. Based only on a person's title, how likely would you be to contact the following titles?

12. Based only a company's annual revenues, how likely would you be to contact them?

13. Based only on a person's functional department, how likely would you be to contact them?

I want to pause here and recommend that you include Firm Size, Titles, Industries, and Functions that you know are unlikely to be called on or even targeted. Your goal is to gather intelligence and build a relative ranking scale to inform the lead scoring. If you just score on the best criteria, then you will never be able to manage bad or not ready leads properly.

14. Taking each of the following actions on its own, how would you rate the action as an indication of a prospect's readiness for a sales call?
    - ❑ Never ready
    - ❑ Not ready
    - ❑ Needs more activity
    - ❑ Ready
    - ❑ Very ready

You can download a copy of this survey to get started.

Translating Relative Ranks to Scores

Once Sales has completed the Survey, you should analyze the data using Excel to best determine the *relative rank* of each title or behavior before proceeding to Marketo. Also see my earlier blog post.

Now you have your data from the survey and other methods. How do you take this data and prepare for programming Marketo?

Step 1: Analysis

For each title, function, company, and behavior, take the average or median ranks from the 1-5 scale. You may want to run a pivot table to see differences between Products, Solutions, or Sales Regions.

Step 2: Ranked Tables

Make two tables: one with Demographics and the other with Behaviors.

Step 3: Sort the demographics in order from most likely to call (5) to least likely to call (1). Do the same for Behaviors.

If you find there are large differences between Solution Sets, Products, or Sales teams you may have to make several scoring tables where you will later filter triggers by several fields.

If you see some weird data, look into it. I hesitate to say, "adjust" but you may have to do so. Remember, you asked for Sales' input, but that doesn't have to be the final say.

Step 4: Build a Lead Scoring Planning Tool

You can download the tool to help you get started. An example is on the next page.

You will have to adjust the planning tool to meet your needs, so this explanation should serve as a guide only.

Step 5: Fill in the Product Sections if desired.

Segment by product, solution, etc. In each group you will keep the specific sub-filters you will use. Note that in this example, each product has a different `Employee Count`, which is important to Sales.

Criteria: what are the basic filters involved?

Relative Rank: this is the score for that demographic or behavior you pulled in Step 2.

Points to Assign: place the number of points you will assign to each activity. I recommend keeping a single score between `-20` and `+20` points. For instance, a rank of 5 may get 20 points.

Number of Times: how many times will this lead be able to run through the campaign? Go to `Schedule > Qualification Rules` to see your options. Place a "1" for `Once` (default) and `Every X Days or Each Time` for others. scores should typically be scored `Once` while Behaviors may require multiple score applications.

> Why is that? If you score Inactivity using `Not Filled Out Form In Past 30 Days`, then the lead can only qualify for this flow `Every 30 Days` in order for the negative scoring to properly work over time. If you did `Once`, that lead would lose points only *once for inactivity even if that lead remains inactive for another year*. It could be possible for that lead to pop up in strange places if negative scoring is not properly active.

Back Score: will you run a batch campaign to score existing leads? For Demographics you should always do so. Only a few behaviors should be back scored.

Type: Trigger or Batch campaign. When you first run scoring, you will have to run several Batch campaigns for demographics. For Behaviors, they will almost all be set to Triggers. Only a few scores should be Batch campaigns including Inactivity and Competitors.

Weighted Average of Demographics vs. Behavior: you could also make use of the Demographic Score and Behavior Score fields built into Marketo. For every Behavior, score just the Behavior Score field. And the same for Demographic Score field. You can then use a Formula field in Salesforce to calculate the final Lead Score. E.g.:

```
(20%)*(Demographic Score) + (80%)*(Behavioral Score) = Lead Score
```

Using this system will make it easier to weight the components, normalizing the overall Lead Score.

Step 6: Fill in Behavioral Rankings which are common to all Leads

If you use a Call Now flag, that flag should receive the highest number of points to push them over to MQL. This is where you will have to follow the ranks, but also assign rational points.

Negative behaviors should be carefully treated because they may have low average Rank, but should receive negative points.

Competitors and Bad Leads should typically have their scores set to 0.

Step 1: Reset ALL Scores to =0

Use this template to help you list out each of the criteria, demographics, and behaviors you will build. You can use this after a Sales Survey or a focus group session.

Product 1	Criteria	From Survey: Relative Rank	Points to Assign	Run Times	Back Score	Type
Employee Count				1	Y	Trigger
Employee Count				1	Y	Trigger
Industry or Company				1	Y	Trigger
Industry				1	Y	Trigger

Product 2	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
Employee Count				1	Y	Trigger
Employee Count				1	Y	Trigger
Revenue				1	Y	Trigger
Revenue				1	Y	Trigger
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger
Seniority	CXO			1	Y	Trigger
Seniority	Vice President			1	Y	Trigger
Seniority	SVP			1	Y	Trigger
Seniority	Director			1	Y	Trigger
Seniority	Manager			1	Y	Trigger
Seniority	Analyst			1	Y	Trigger
Seniority	Specialist			1	Y	Trigger
Seniority	Intern			1	Y	Trigger
Seniority	Student			1	Y	Trigger
Seniority	Professor			1	Y	Trigger
Seniority	Consultant			1	Y	Trigger

Product 3	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger
Functional Areas				1	Y	Trigger

Behavioral Rankings	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
Multiple Website Visits	3+			Every 7 Days	N	Trigger
Career Page	Bad			Every 7 Days	N	Trigger
Unsubscribe	Neutral			Each Time	N	Trigger
Comment Box Keywords				Once	N	Trigger
Whitepaper Download				Each Time	N	Trigger
Case Study Page				Each Time	N	Trigger
Demo Page				Each Time	N	Trigger
Webinar				Each Time	N	Trigger
Inactivity	Any non activity			Every 30 Days	N	Batch
Personal Email Domain				Once	Y	Trigger
Competitors	set to 0			Each Time	Y	Batch
Contact Us Form Fill out				Once a Day	N	Trigger
Email Bounces Hard	hard bounce x 2			Once	Y	Trigger
Google Search Term	keywords			Once	Y	Trigger

Building a Scoring System in Marketo

Now comes the fun part! We can use Marketo to build the necessary logic to automatically handle millions of leads you bring in every week.

Scoring System Models

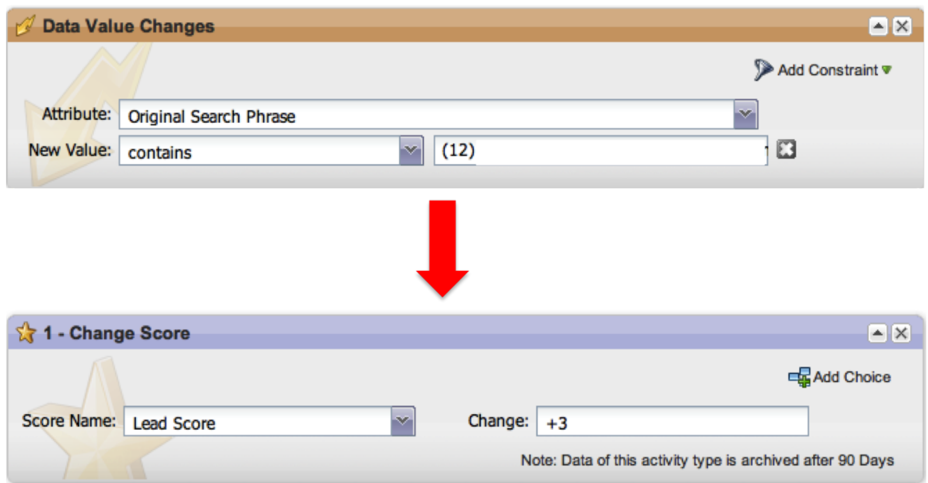
There are three scoring models you can use to run Scoring campaigns

Independent Smart Campaigns

Best Practice: use one of the first two models for faster setup and clearer options.

This model uses individual demographic or behavioral scores. You will use these in the next two models as well, however, these are individual and independent campaigns running on Triggers or periodically as Batches.

Value Change→Score Change – this changes the score when and if the lead meets the criteria in a batch or trigger.



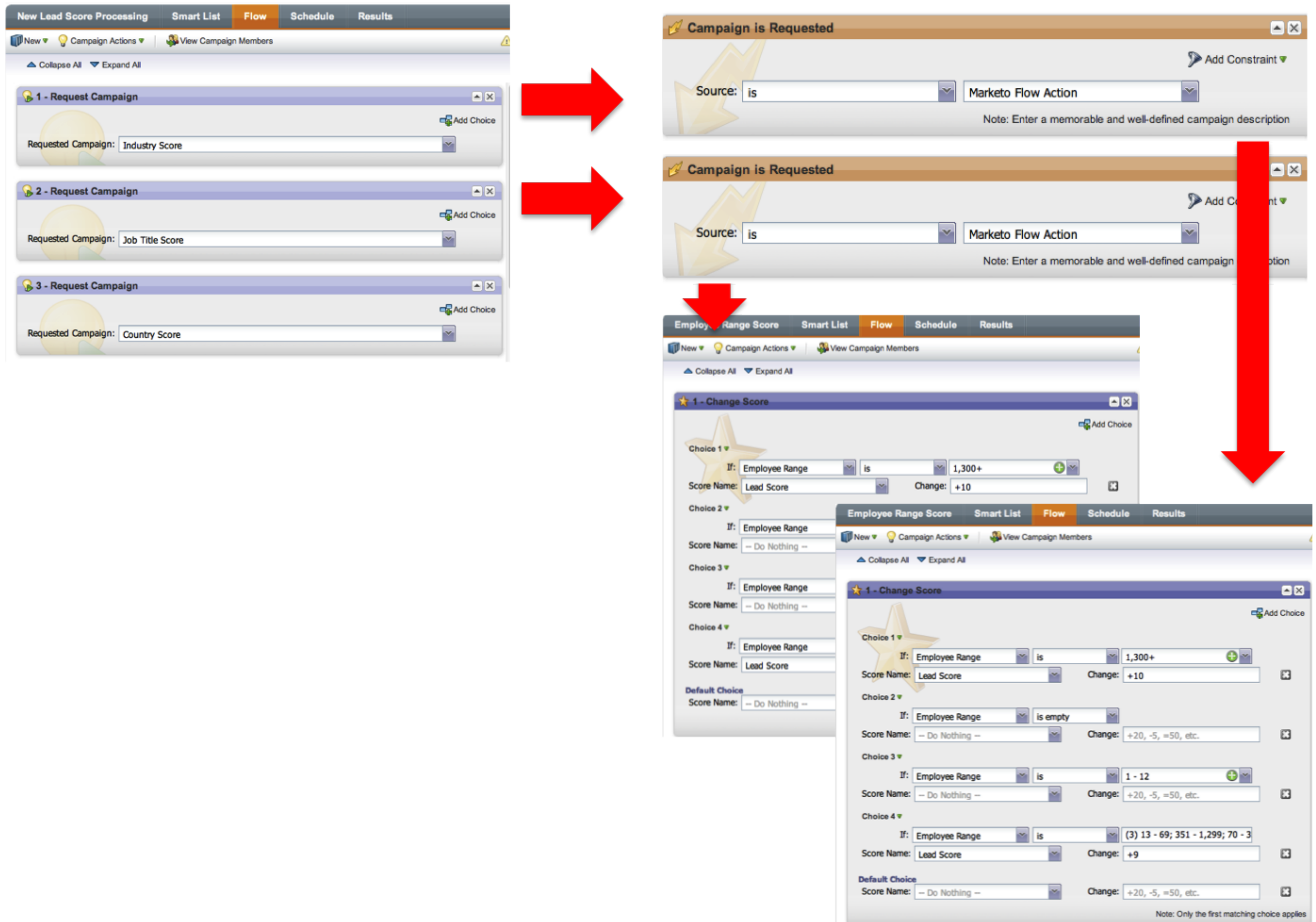
Requested Scoring Program

For New Leads: New Lead Flow→ Request Scoring Campaign → Values → Request Score → Score Change

This model is for systems where you have a single campaign that runs when Lead is created. This flow Requests Campaigns such as Data Managers, Lead Flow, and Lead Scoring. The requested campaigns will then call the child campaigns to run only when requested. You may still need behavioral triggers running separately as single step models.

For existing Leads: Value changes→Request Scoring Campaign→Score Change

This similar model listens for any trigger change on the fields desired, then calls the appropriate score flow campaign. I do not recommend this because of the extra step involved.



Program Scoring

There are a few ways you can use a Program to Score. First, you can create a custom Channel and use the Program to also manage your MQL flow. A second choice is to collect all scoring campaigns into a Program so you can use My Tokens for more efficient management.

Scoring Program with Lead Flow Management

This is where you create a custom `Channel` called `Scoring`. You then create a Program called "`Lead Scoring Program`" which contains child Smart Campaigns for Behaviors and Demographics. Your Progression Statuses should be carefully chosen to align to the buying stages from Unknown to Won. You could also use a status range limited from Known to SAL.

Marketo and some people recommend a simple Program Channel called "Scoring" with one Member Status, such as "`Member`". You could also use such a program to manage your MQL process with Statuses such as

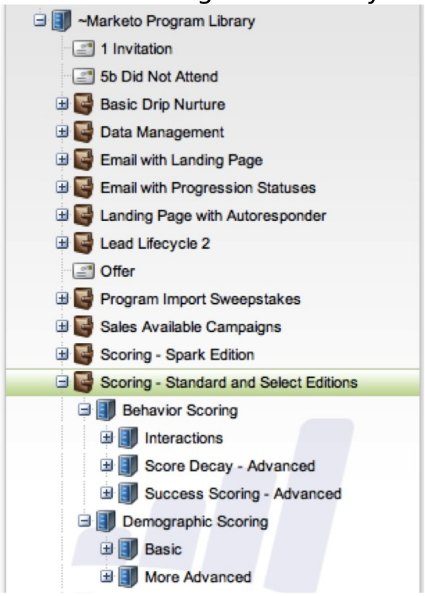
```
Member
Inactive
MQL
Recycled
```

If you decide to use a Program to both score leads and manage the lead flow, then do not use a separate lead management campaigns series. Do it all from the Program so you can match the Progression Status to Lead Status/Stage in your CRM and in Revenue Cycle Analytics.

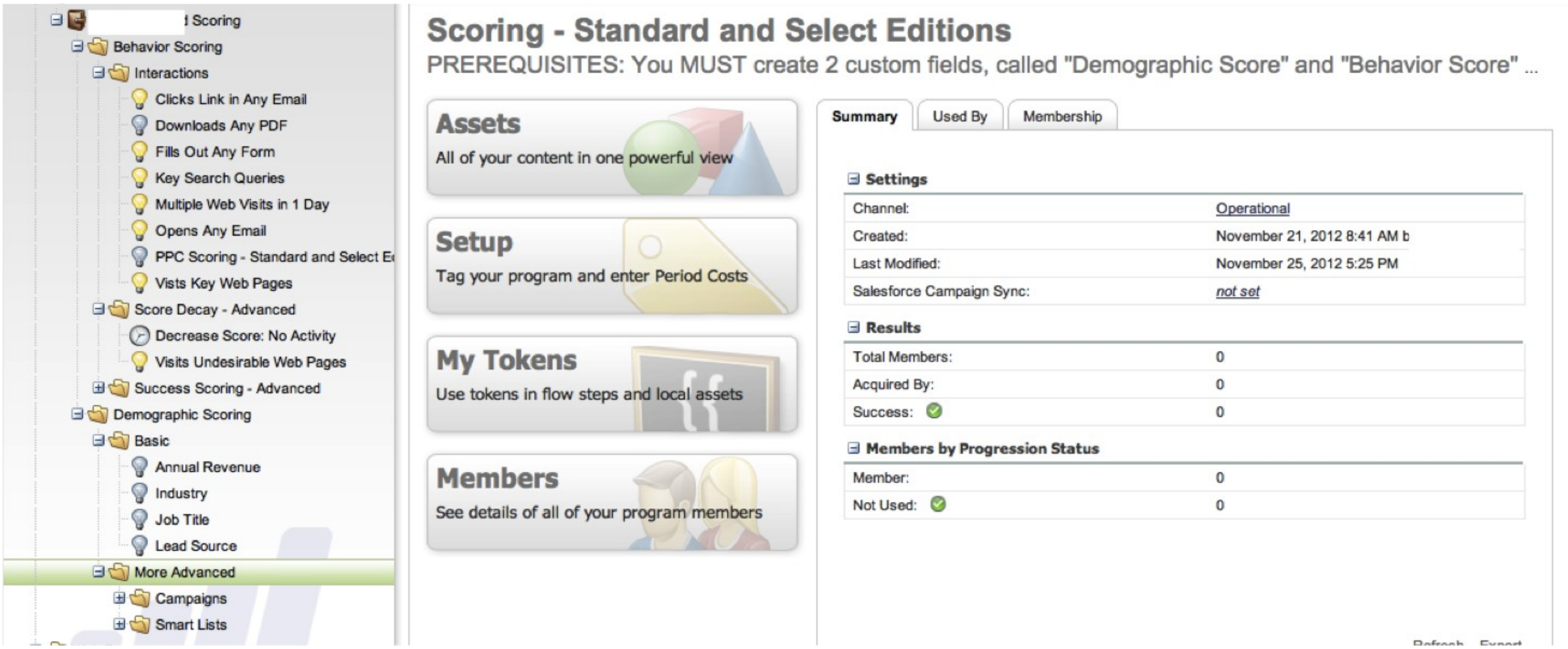
Scoring Program for Efficiency

In the Marketo Program Library, Marketo provides a simple Scoring Program Channel along with pre-built campaign system. You can clone this program and then quickly modify it along the lines I suggest below.

Step 1: Go to Marketo Programs Library



Step 2: Clone the Scoring – Standard and Select Editions



Note in this `Operational Channel`, there are two `Statuses: Member` or `Not Used`, neither of which is necessary since the goal is to set scores.

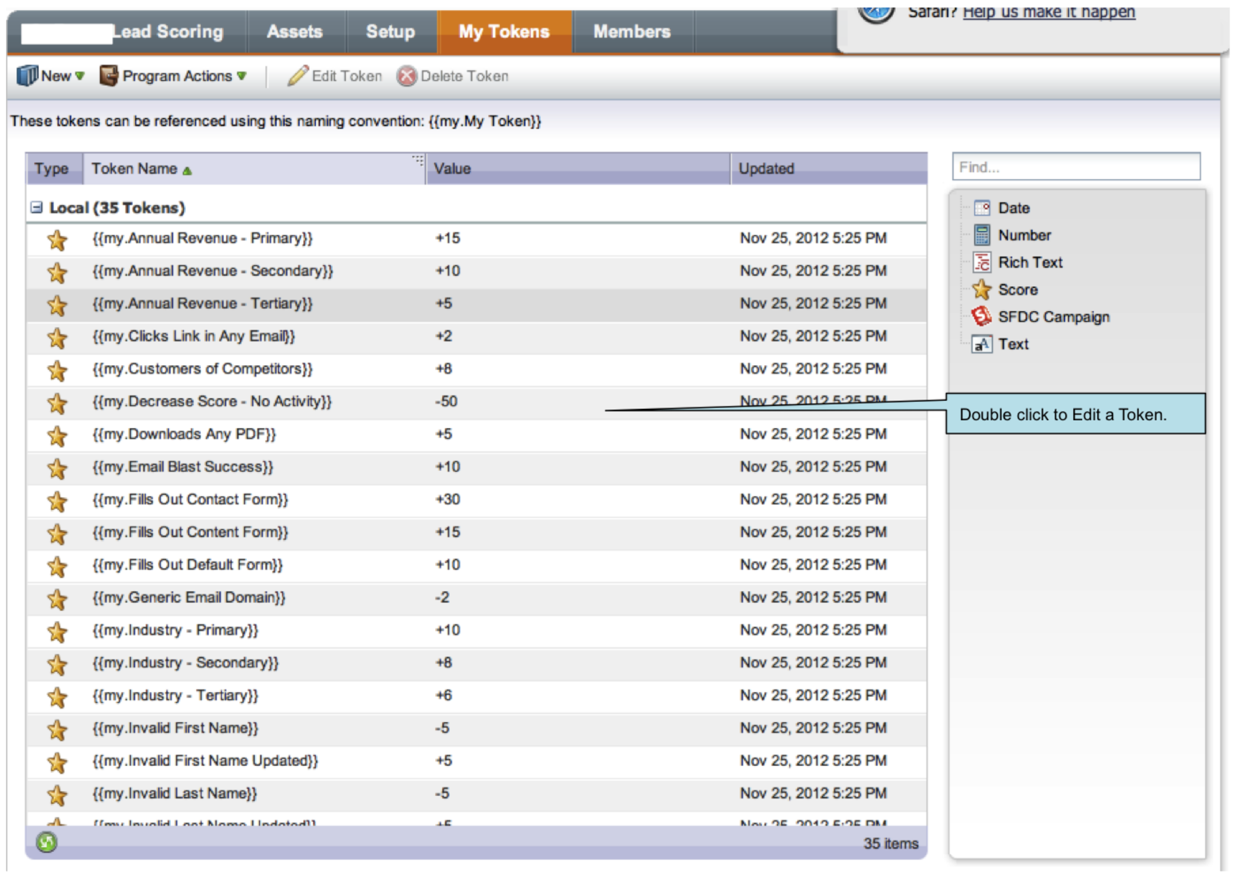
Step 3: Rename the cloned Program

Step 4: Adjust the Smart Lists to your needs

There are more details on which `Smart Lists` you may need and how to build them. You can build them inside this Program as Marketo has, or you can place them in `Lead Database`.

Step 5: Adjust the underlying scores using My Tokens

This Program ingeniously uses tokens in each Scoring workflow so that you can adjust all Scores from a single panel, `My Tokens`. You may edit the `Values` or Add or Delete tokens as needed to create your own scoring system.



Since Scoring should be a global system, I [recommend using the folder options and smart campaigns instead](). Of course, there are advantages to using a Program to collect all the scoring mechanisms in one place while managing the score values in one place. The choice is yours.

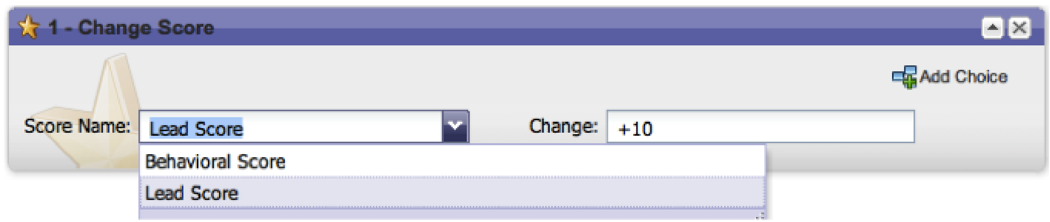
For this chapter, I will mostly discuss the Independent Smart Campaign system. It is clearer and forms the basis for the other two models.

Multiple Scoring Fields

Marketo supports multiple scoring fields that you can use in a variety of ways. Out of the box, Marketo has:

- `Lead Score`
- `Behavioral Score`
- `Demographic Score`

Most firms can use any or all of these easily and without any issues. If you are starting out with scoring, I recommend only using the `Lead Score` field, which is the default whenever you pull in the flow action `Change Score`.



Score Threshold Model

You can scale your scoring system to be absolute or relative.

In the **Absolute** model, which I use, you score all the leads using the system we created above. Then based on the distribution of leads in the initial system, you set a threshold MQL level. The caveat here is a Lead's score can continue increasing, especially if they are active on your site and you have a +1 for each page visit. Negative scores for inactivity, poor data, etc. counter this situation.

In the **Relative** model, you scale the score to 100 for simplicity. Any lead that makes it to 100 is set to MQL and sent to Sales. Then you have to carefully scale each scoring item so it is weighted against 100%. Many people assign a 30% weight to Demographic and 70% to Behavioral, and then adjust individual item scores appropriately.

Ensure that people who request a Call Now receive a higher score and at least are viewed by someone in Marketing or you risk ignoring people because of their score.

Smart List Creation

Scoring will use quite a few smart lists as a base. While you can use a Program to collect all of these together, it is not recommended.

Go to Lead Database and create three folders:

```
Lead Scoring Smart Lists
-Demographics
-Behaviors
```

A note on Buyer Personas: if you have these, you may want to create smart lists for each one. Only those leads with enough data will qualify for your lists and that is ok. You can then setup a SFDC field called Buyer Persona. Once it syncs to Marketo, use this field in a Data Management workflow to populate a List and a Field anytime someone meets the criteria. You can then use that Persona field to score on if desired. Be careful not to double count scores with Title, Function, etc.

Which Lists Do You Need?

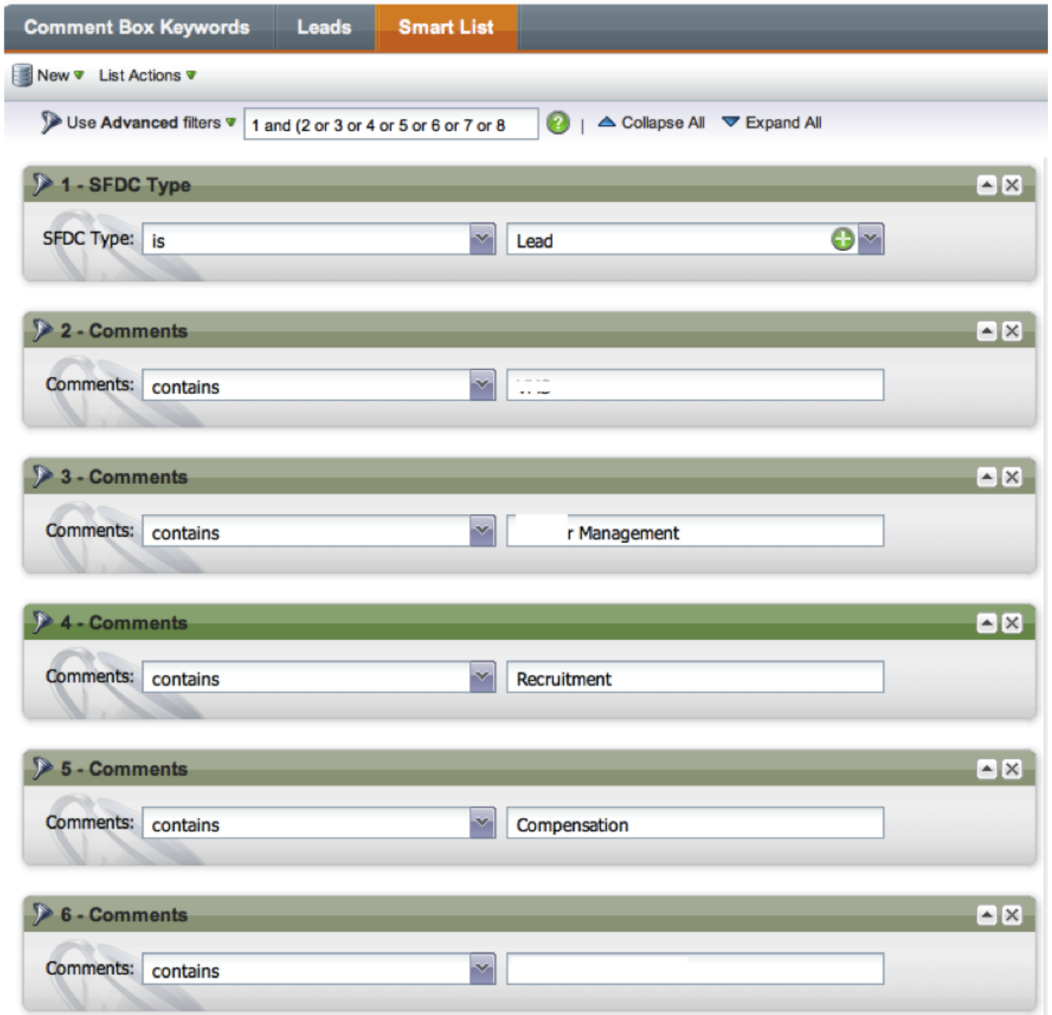
Go back to your Lead Scoring Planner to determine which lists you need to build. Which lists you need are up to you. Some common scoring lists will include `Titles`, `Bad Titles`, `Personal Email Domains`, and `Product Interest`. Remember, you can also use a well-designed smart list for other purposes, such as sorting leads or handling Lead Flow.

You may need several lists, or use your Standing Lists, as part of this process. The lists you create may function as part of a single Scoring Flow using a series of Choice Steps, or they may be part of a single Scoring Campaign.

Here are some examples:

Comment Box Keyword Scoring

This list is to capture leads that have high value keywords about our solution. You could also clone this and make a `Bad Comment Box Scoring List` with keywords you do not want to see.

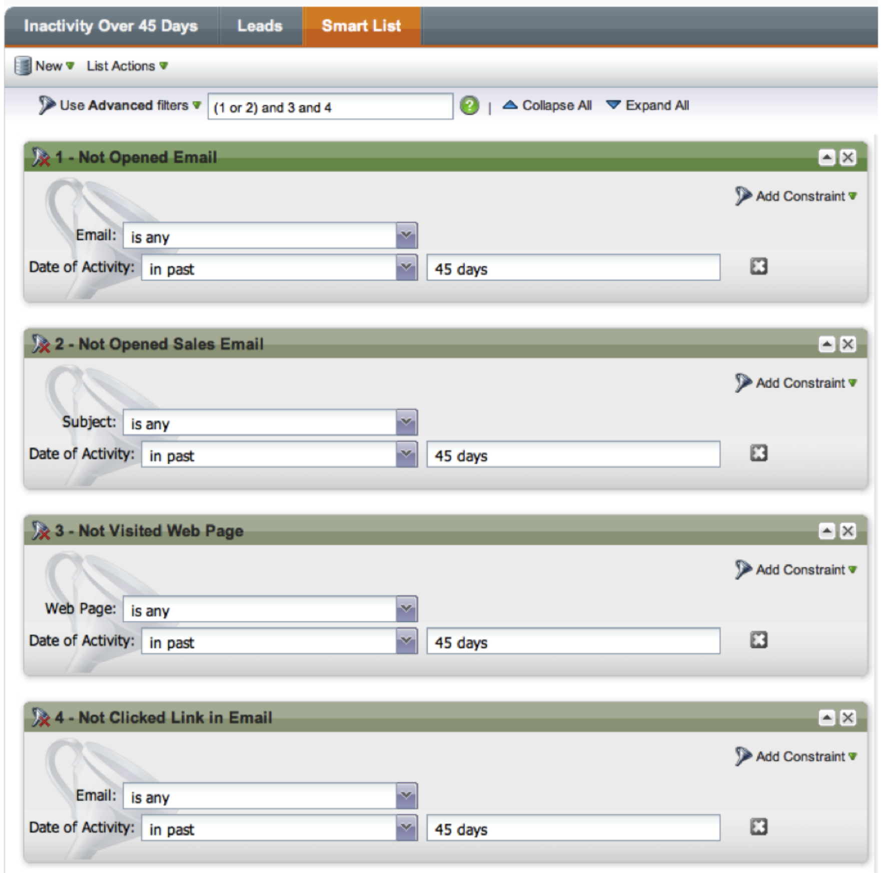


Title Scoring List

Title scoring should encompass several lists, of good and bad titles, depending on your needs. You might have a list for `Students`, `CXOs`, and `Buyers`.

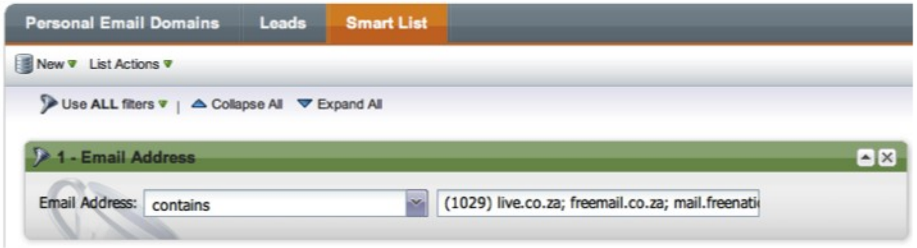
Inactivity Over 45 Days

Inactivity can be measured in several ways. In this example, I chose to bring in Leads who did not open any type of email in the past 45 days and who did not visit a web page and did not click in an email. Whom you want to include could be different.



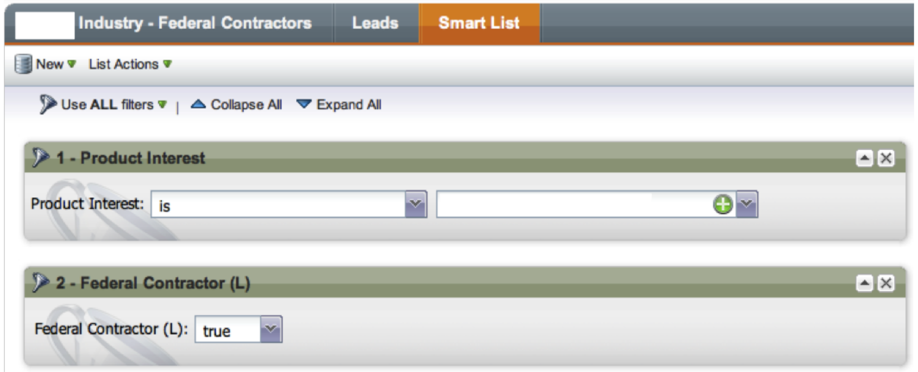
Personal Email Domains

You will likely want to demote Leads who registered with a personal address. Please demote them, nurture them, and encourage them. I see too many firms just trashing these even with Marketo tools at their disposal. You can download a domain list from my site.



Product Interest for Scoring

Some firms have multiple products or solution areas with different processes and buyer personas. You may want to setup special scores for specific groups like this.



Status | Used By

Summary

Type:	Smart List
Created:	Aug 10, 2012 12:31 pm EDT
Last Modified:	Aug 13, 2012 05:52 pm EDT

Smart List (4)

Advanced filters:	1 and (2 or 3) and 4
Filter 1 - Product Interest:	Product Interest is in ' ement', 'Recruiting'.
Filter 2 - Job Title:	Job Title is in 'Chief Executive Officer', 'Chief Talent Officer', 'Chief of Human Resources', 'Ch…
Filter 3 - Job Title:	Job Title contains 'Chief'
Filter 4 - Job Title:	Job Title not contains in 'Dep.', 'Deputy', 'Consult', 'Consulting', 'Principal'.

Revenue Scoring Lists

You can also bring in data on firm size and even combine it with other fields to focus on the different buyer types for each solution area you sell.

Status | Used By

Summary

Type:	Smart List
Created:	Aug 10, 2012 01:57 pm EDT by
Last Modified:	Aug 13, 2012 05:29 pm EDT

Smart List (2)

ALL filters apply:	(1 and 2 and 3 ...)
Filter 1 - Product Interest:	Product Interest is '
Filter 2 - Annual Revenue:	Annual Revenue less than '20000000'

Additional lists could include Employee Size, User base, Partners, Other Products Used, OEM Use, etc.

Creating Workflows

Batch vs. Trigger: what works for your business or your databases?

There is no consensus on which type of campaign is best for lead scoring. Batch campaigns can be used in all cases; however, Triggers work best for scores based on field data. For instance, it is much harder to setup a Trigger campaign to handle lead inactivity because a Trigger must be based on an Action or Change, but Smart Lists do not create either. Getting around that with an Add to List/Remove from List action is cumbersome. Here is a quick list of what seems to work best:

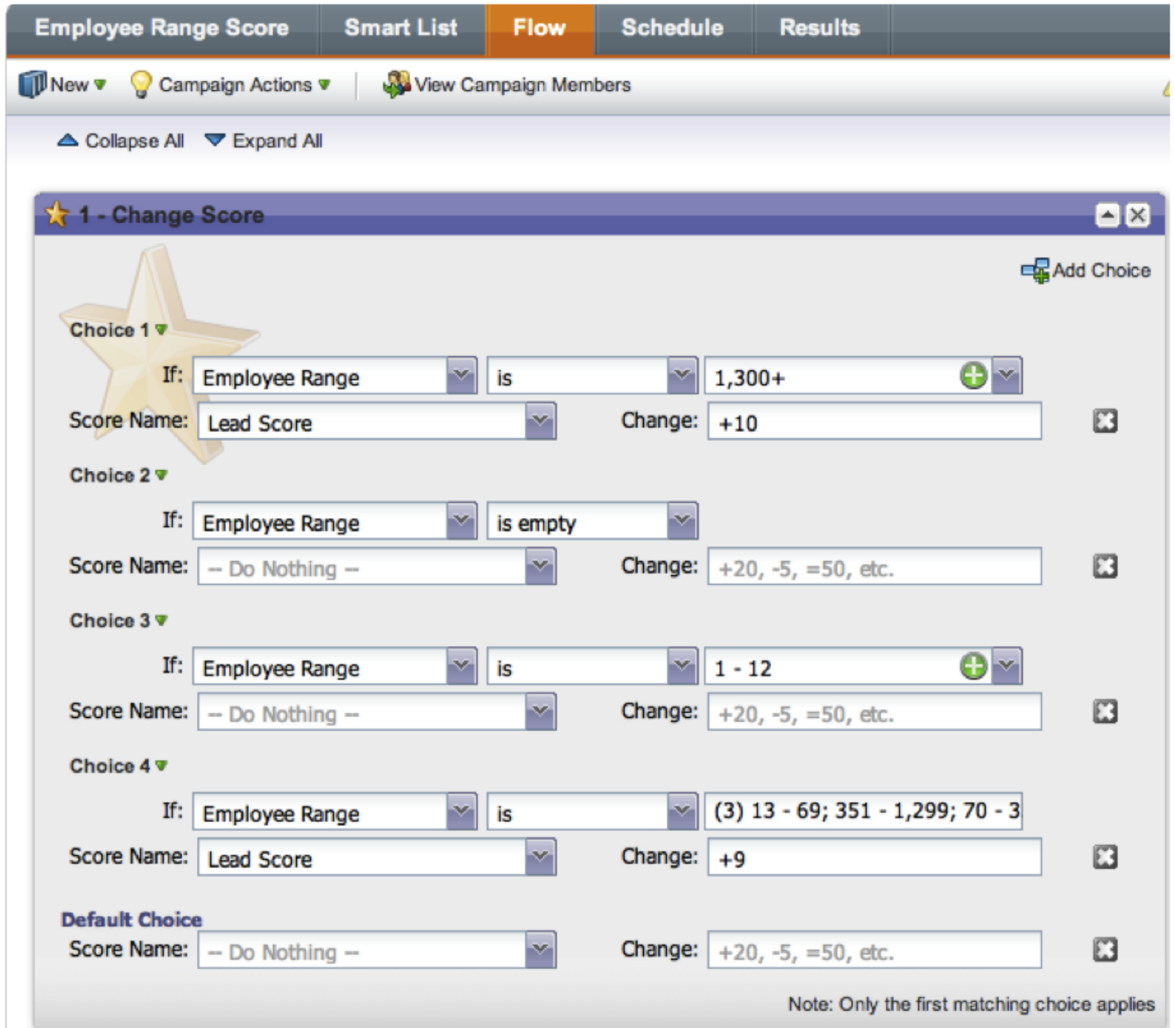
type of Scoring	Batch	Trigger
Field Value (e.g.: title, email domain)	✔	✔
Time Based (egg: in past X days)	✔	✖
Action Behavior (just happened)	✖	✔
Back Scoring or Model Change	✔	✖

Batch Scoring

Use a batch scoring campaign to handle scores based on Time, Fields, or Back Scores. It is best to use batches for Time or Back Scoring. For instance, when you first setup the Lead Scoring System, you will need a series of back scoring campaigns to run against fields like Title, Company, or Industry.

Batch Demographic Back Score: Employee Range

Whenever the field `Employee Range` changes, you can score the lead depending on the range it falls into.



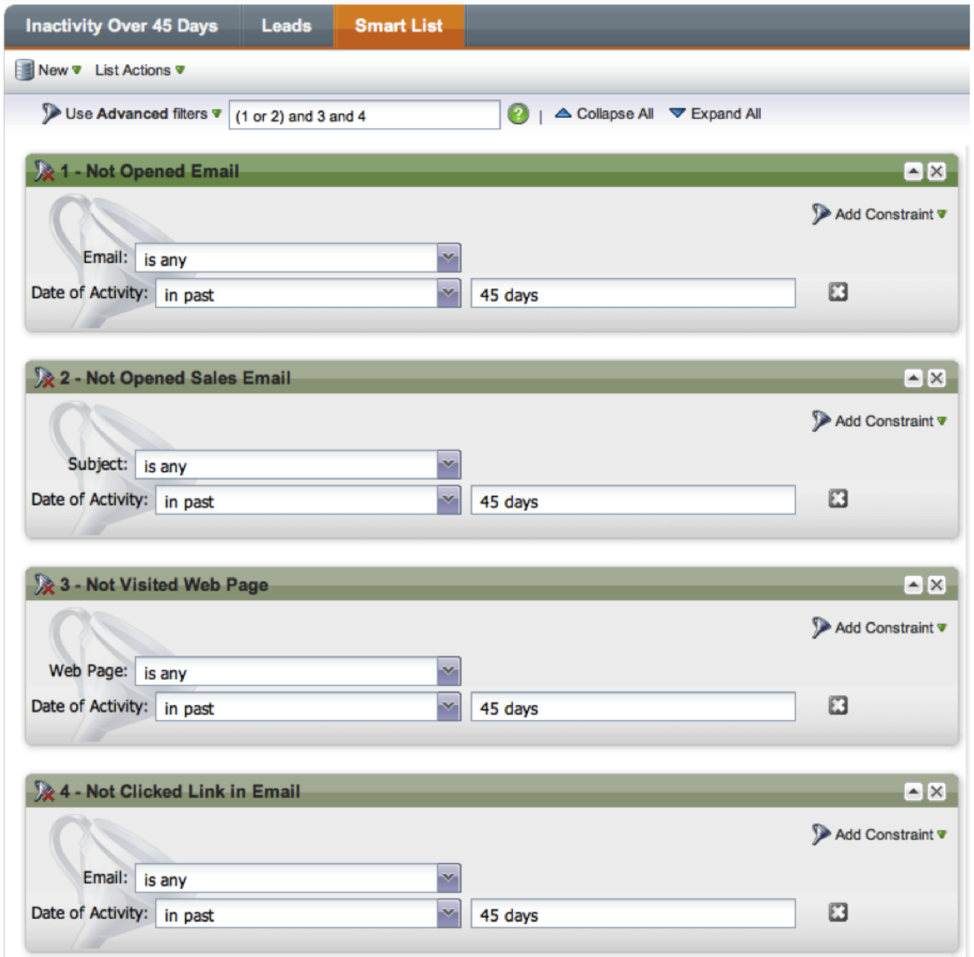
Batch Behavior Run Every 45 Days: Inactive

Step 1: Inactive Smart List

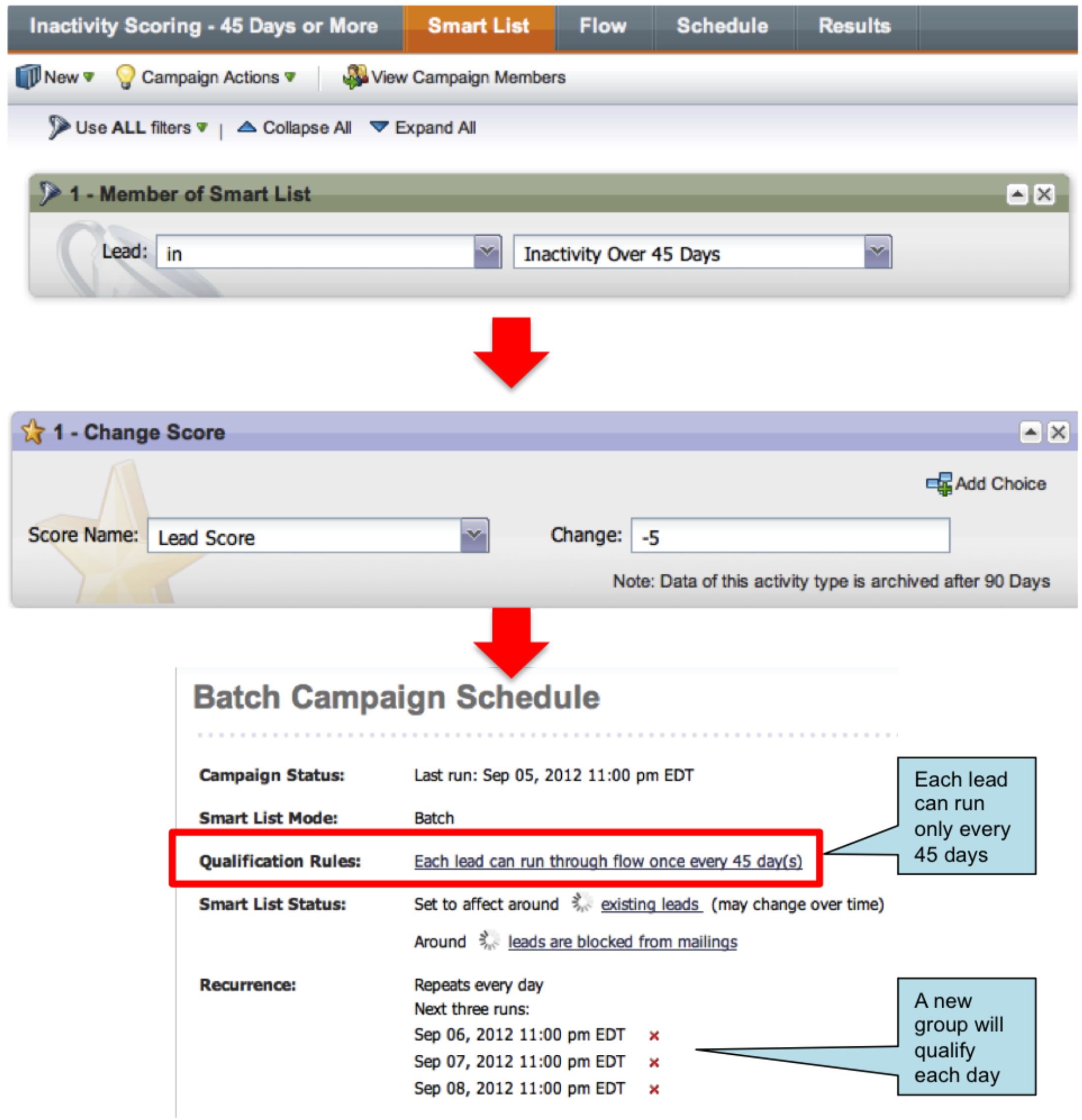
Create a Smart List that brings in Leads who have various inactivity behaviors. You can choose whichever filters you want for your business. I recommend

```
Not Was Opened Email
Not Filled Out Form
Not Clicked Link in Email
Not Visited Web Page
```

All in past X Days

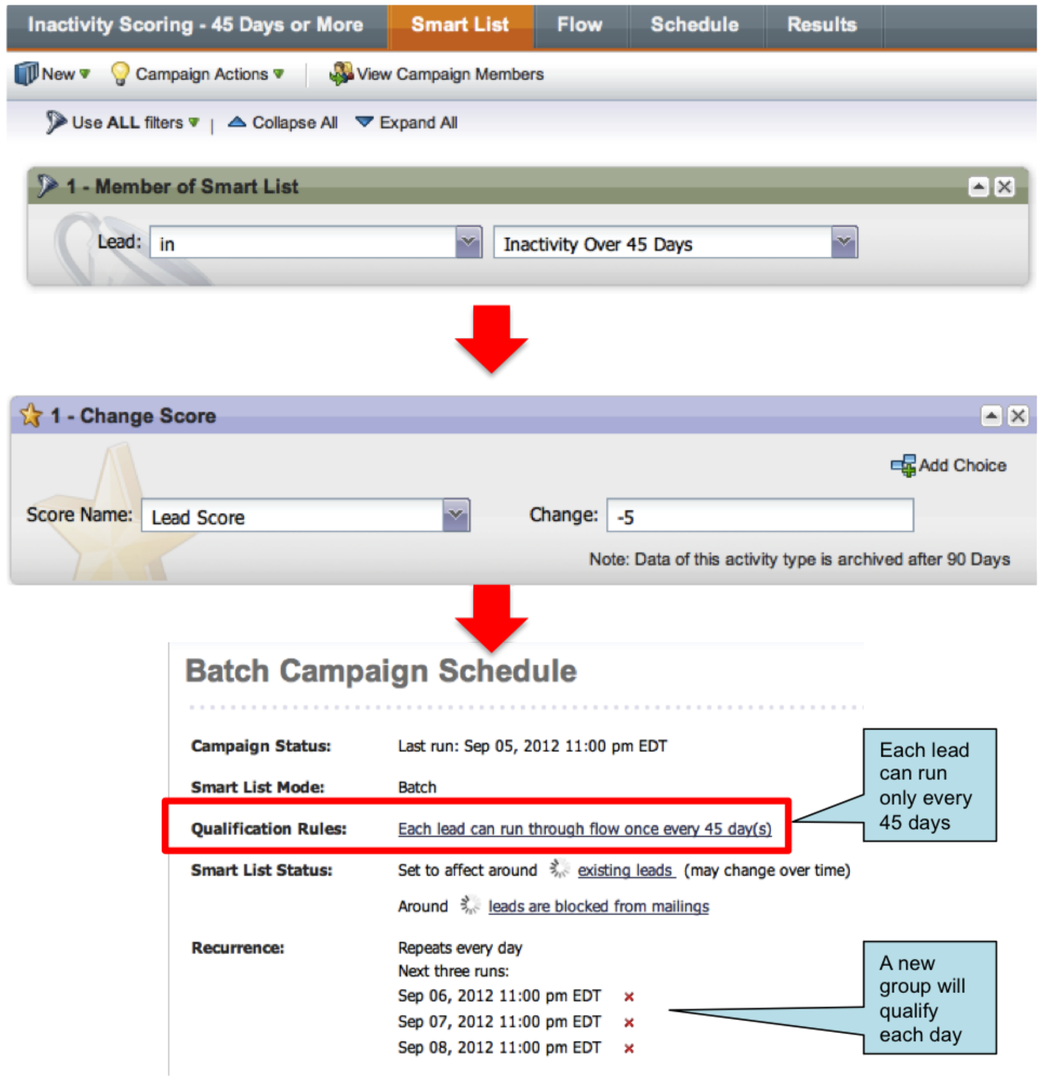


The leads that qualify will vary over time, which is good, because we only want to lower scores for leads who were inactive in the previous 45 days. Ideally, some leads will reactivate thanks to your great nurturing campaigns!



Step 2: Inactive Batch Campaign

Using the Smart List to drive this campaign, you can set up the scoring quickly:

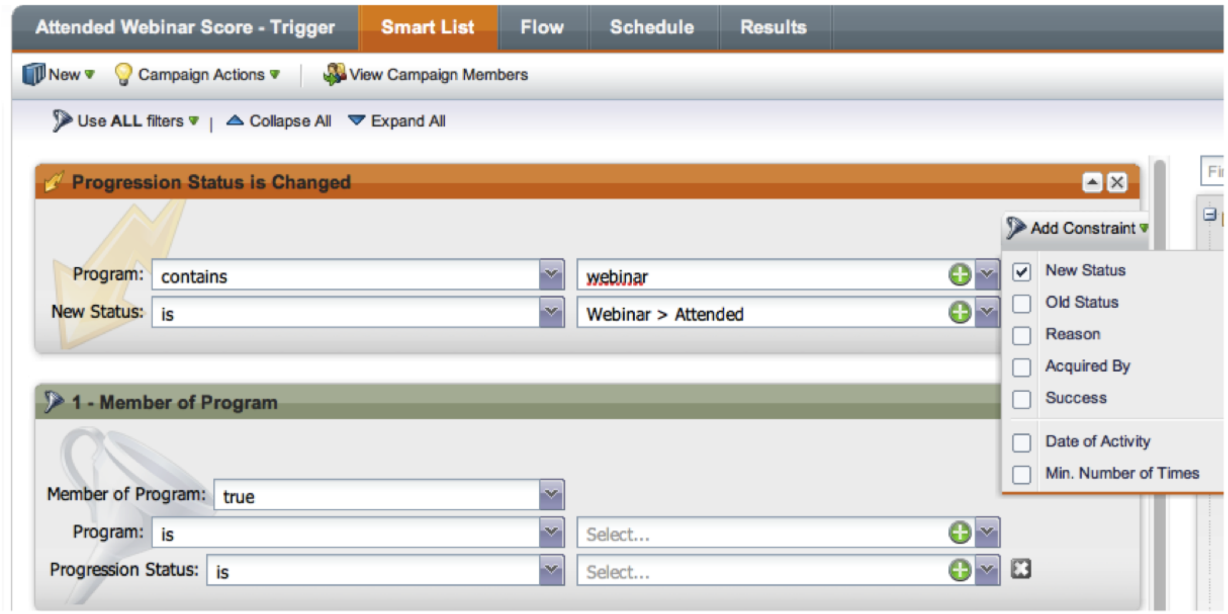


Triggered Scoring

Use triggered scoring flows to handle New Leads, Changes in Fields, or Behaviors. For instance, if the `Title` changes to `CEO`, then rescore the Lead.

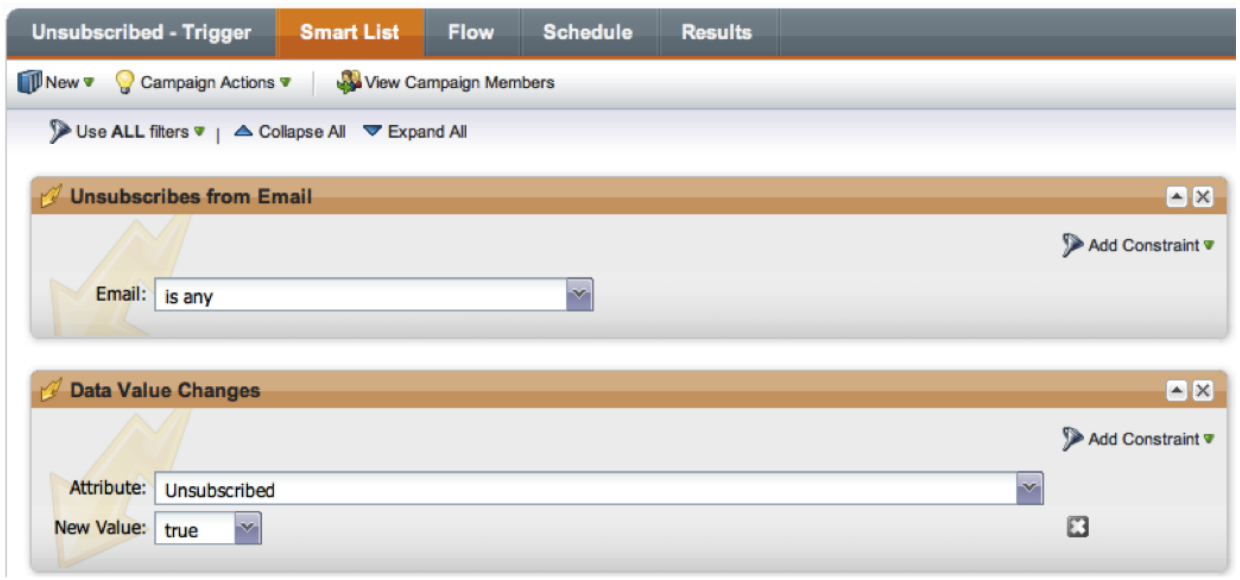
Triggered Webinar Attendance

If Member of Program is True and IS ANY and new Progression IS Webinar>Attended, then score.



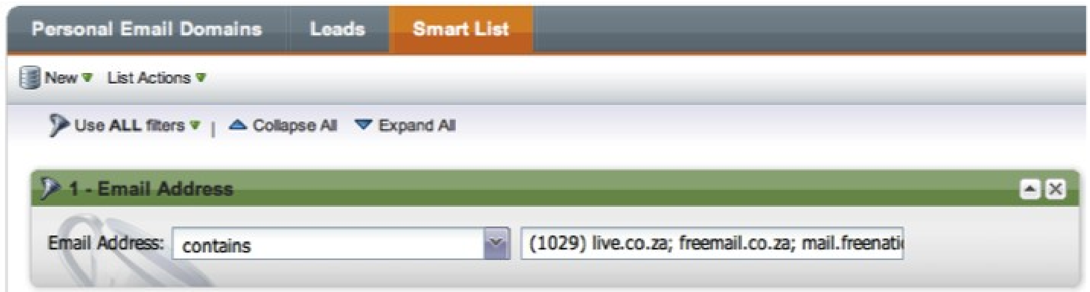
Triggered Unsubscribe

Unsubscribing is a negative behavior. Usually I score a total `Unsubscribe` (`Email Opt Out`) only. You can, of course, score individual channels such as Newsletter, Webinar Invitation, or Event Invitation each with individual scores. It's up to you.



Triggered Demographic: Email Changes is NOT personal

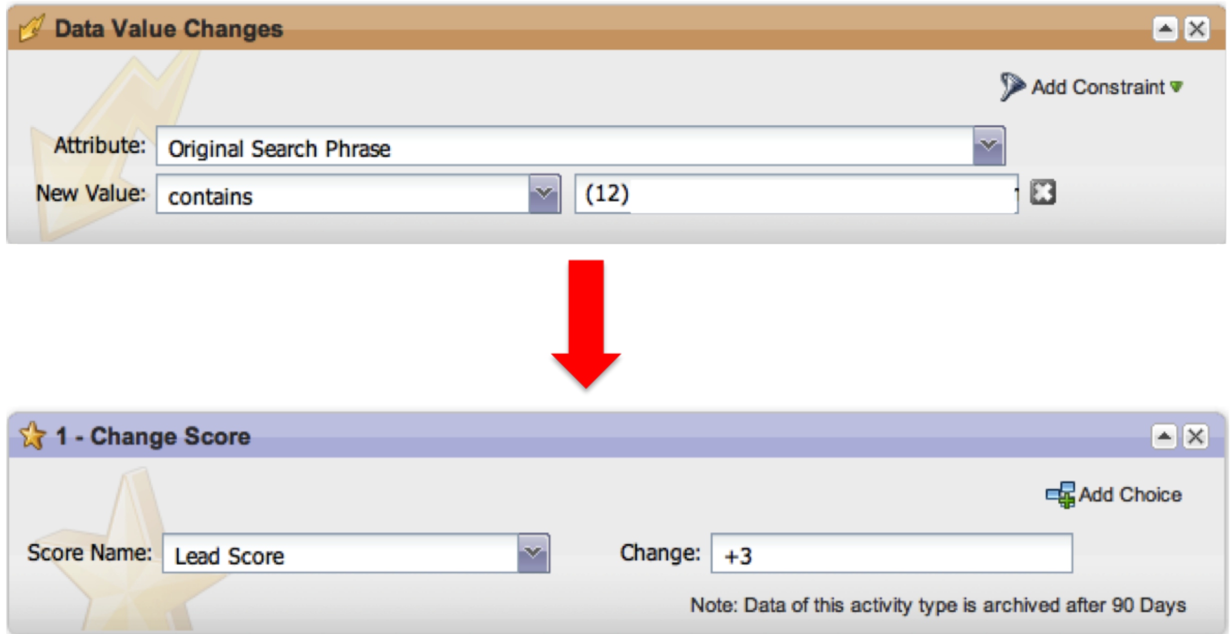
Many firms and sales people see use of a personal email address as a negative behavior. While you can lower a score for using `"@gmail.com"` you may also want to increase it when the lead *does not* use a personal email. A trigger flow which watches for both Personal Email and Not Personal Email can take care of this.



Remember to set the `Schedule to Qualify Every Time`.

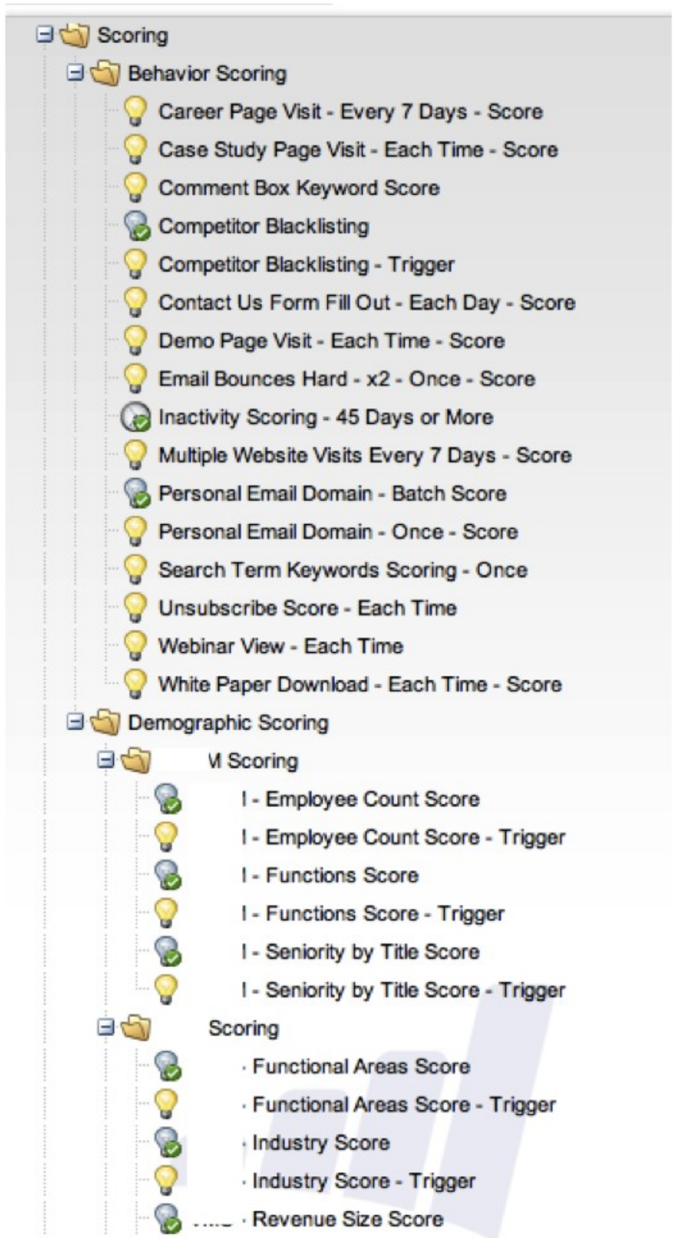
Triggered Behavior: Original Search Phrase

You can also set triggers based on keywords in text fields including the powerful data from search engines. I always add points to someone who used my `Company Name`, `Competitors`, or related solution keywords.

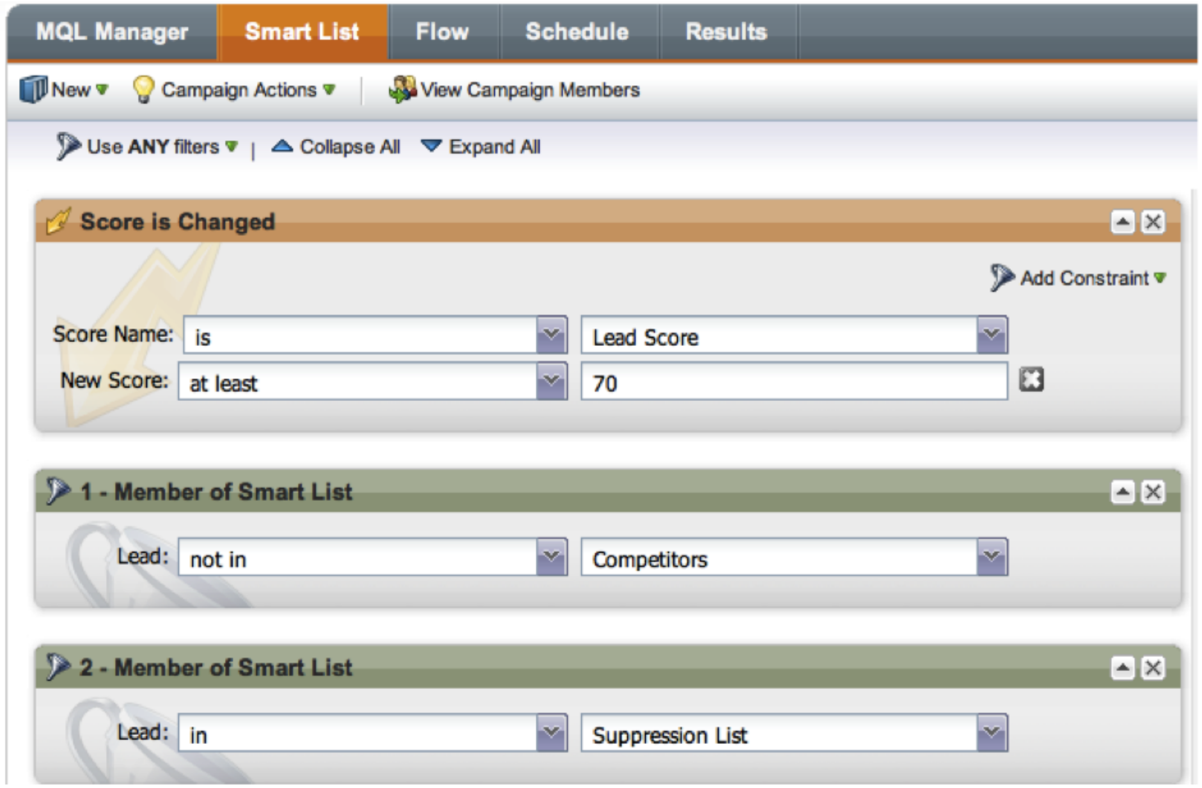


Example Systems

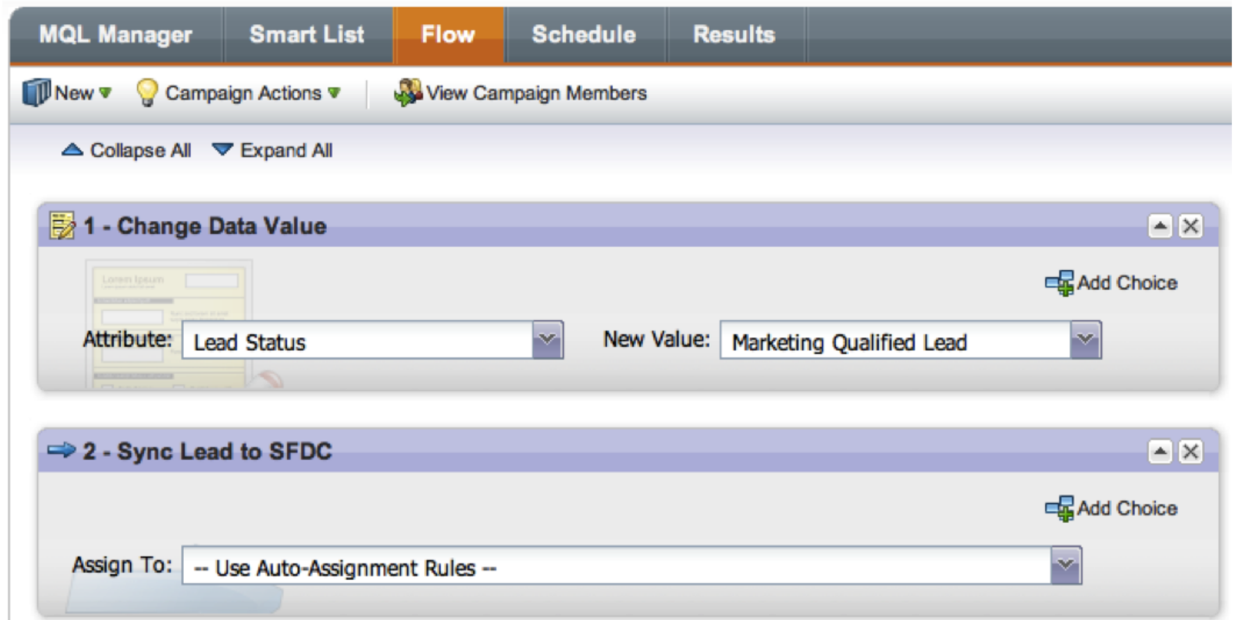
When you are done, you will have a similar tree in your `Marketing Activities` area. Remember to have a Lead Management campaign for moving MQLs to Sales (or a special queue).


Scoring
Behavior Scoring
Career Page Visit - Every 7 Days - Score
Case Study Page Visit - Each Time - Score
Comment Box Keyword Score
Competitor Blacklisting
Competitor Blacklisting - Trigger
Contact Us Form Fill Out - Each Day - Score
Demo Page Visit - Each Time - Score
Email Bounces Hard - x2 - Once - Score
Inactivity Scoring - 45 Days or More
Multiple Website Visits Every 7 Days - Score
Personal Email Domain - Batch Score
Personal Email Domain - Once - Score
Search Term Keywords Scoring - Once
Unsubscribe Score - Each Time
Webinar View - Each Time
White Paper Download - Each Time - Score
Demographic Scoring
M Scoring
I - Employee Count Score
I - Employee Count Score - Trigger
I - Functions Score
I - Functions Score - Trigger
I - Seniority by Title Score
I - Seniority by Title Score - Trigger
Scoring
Functional Areas Score
Functional Areas Score - Trigger
Industry Score
Industry Score - Trigger
Revenue Size Score

Step 1: Smart List: `Score is Changed Score AT LEAST X`



Step 2: Flow: `Lead Status = Marketing Qualified Lead`

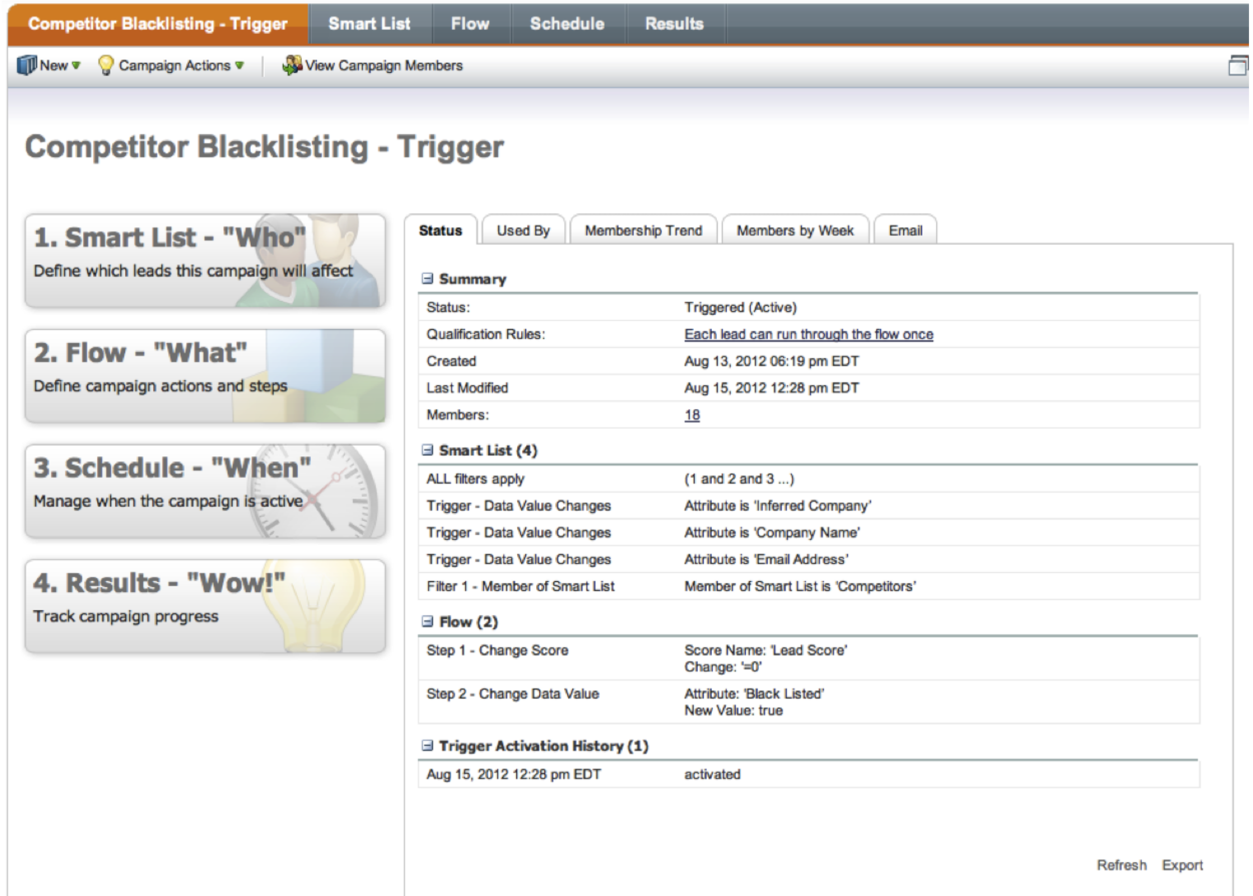


Handling Competitors

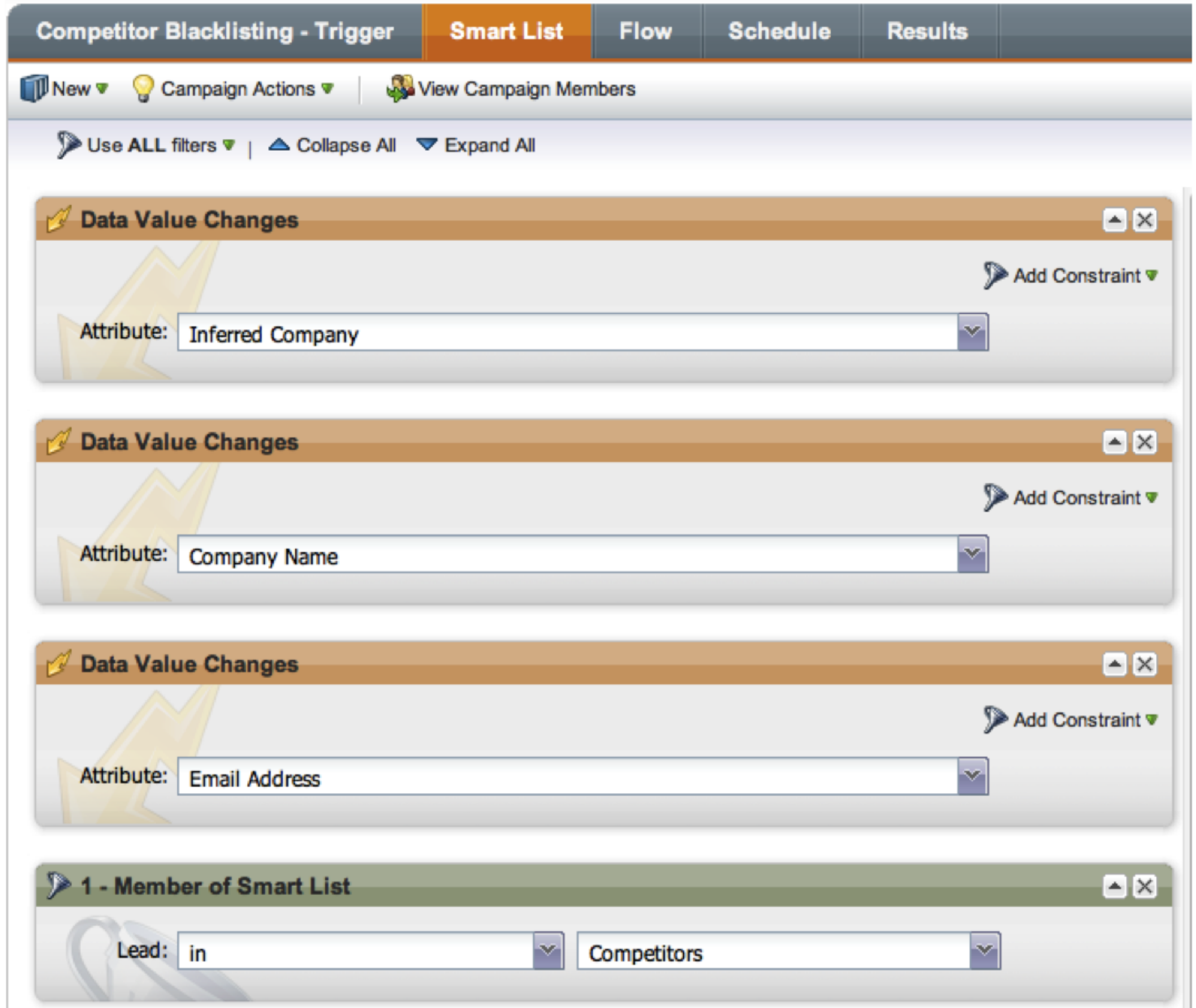
I recommend handling Competitor data up front as they are created. The entire flow should be a part of your Lead Scoring System even though it will handle a number of functions. Keep your Competitor Leads in your database so you can track their activity as they peruse your site or try to download things. If you carefully watch their Web Activity, you may be able to spot potential feature launches and client attacks before they happen.

The flow below is what I recommend when a Competitor lead enters the database. Remember, this is based on your `Competitor Smart List`, which we built in a different chapter. Not all competitors are foolish enough to use their real email addresses (although many do), so the Competitor Smart List will help you snag those who fail to cover their tracks.

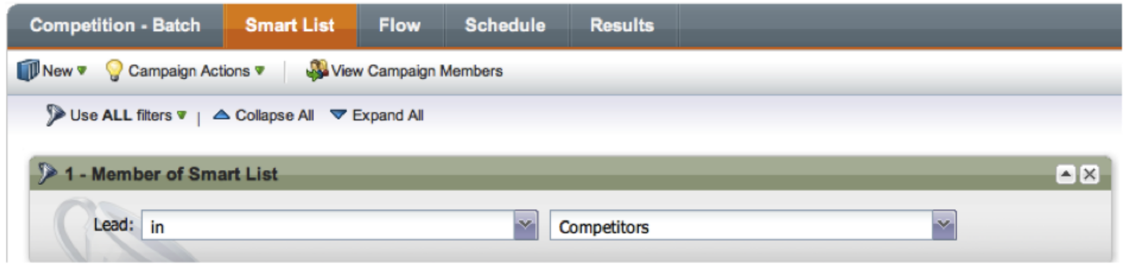
A triggered competitor system:

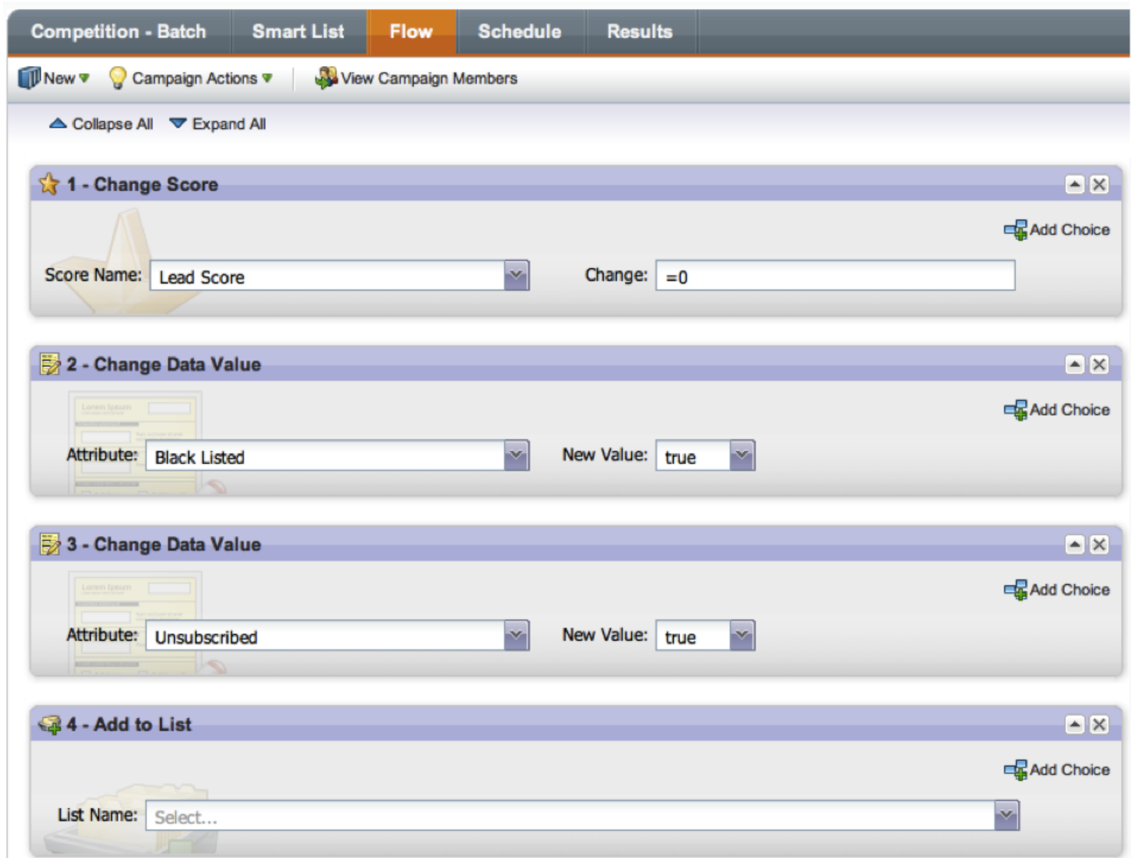


Note how the triggers will catch any lead that may suddenly reveal they to be a Competitor.



A Batch competitor list system is a good choice for an MQL system where leads are held until they reach a threshold. Then you can reduce the score as well as place the leads out of your main system.


Competition - Batch
Smart List
Flow
Schedule
Results
New
Campaign Actions
View Campaign Members
Use ALL filters
Collapse All
Expand All
1 - Member of Smart List
Lead: in
Competitors

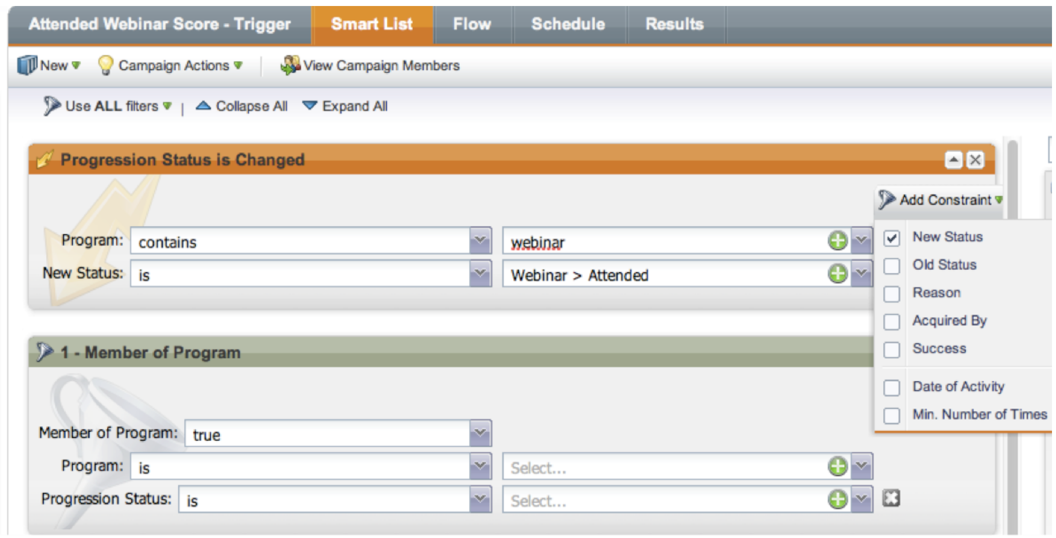

Competition - Batch
Smart List
Flow
Schedule
Results
New
Campaign Actions
View Campaign Members
Collapse All
Expand All
1 - Change Score
Add Choice
Score Name: Lead Score
Change: =0
2 - Change Data Value
Add Choice
Attribute: Black Listed
New Value: true
3 - Change Data Value
Add Choice
Attribute: Unsubscribed
New Value: true
4 - Add to List
Add Choice
List Name: Select...

Triggers for Scoring Behaviors

Here are possible Trigger smart lists to help you design your own system. Remember to use these as a guide.

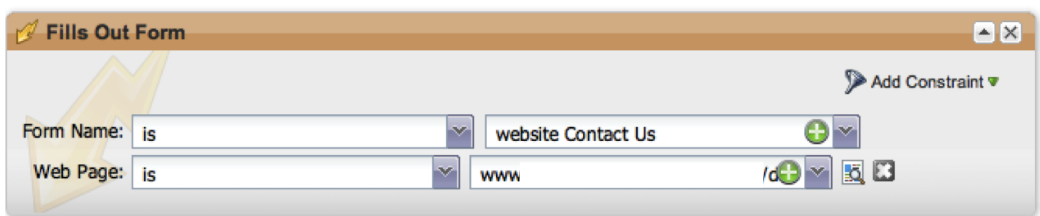
Attended Webinar or Event

You can use Progression Status as a trigger or batch filter for any positive or negative behavior scoring. In this case, automatically score people whose `Progression Status Changes to Attended` on any webinar.

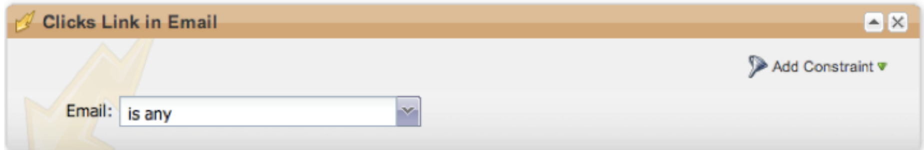


Fills Out Form

You can use this for any form or specific forms such as Contact Us or Free Trial.

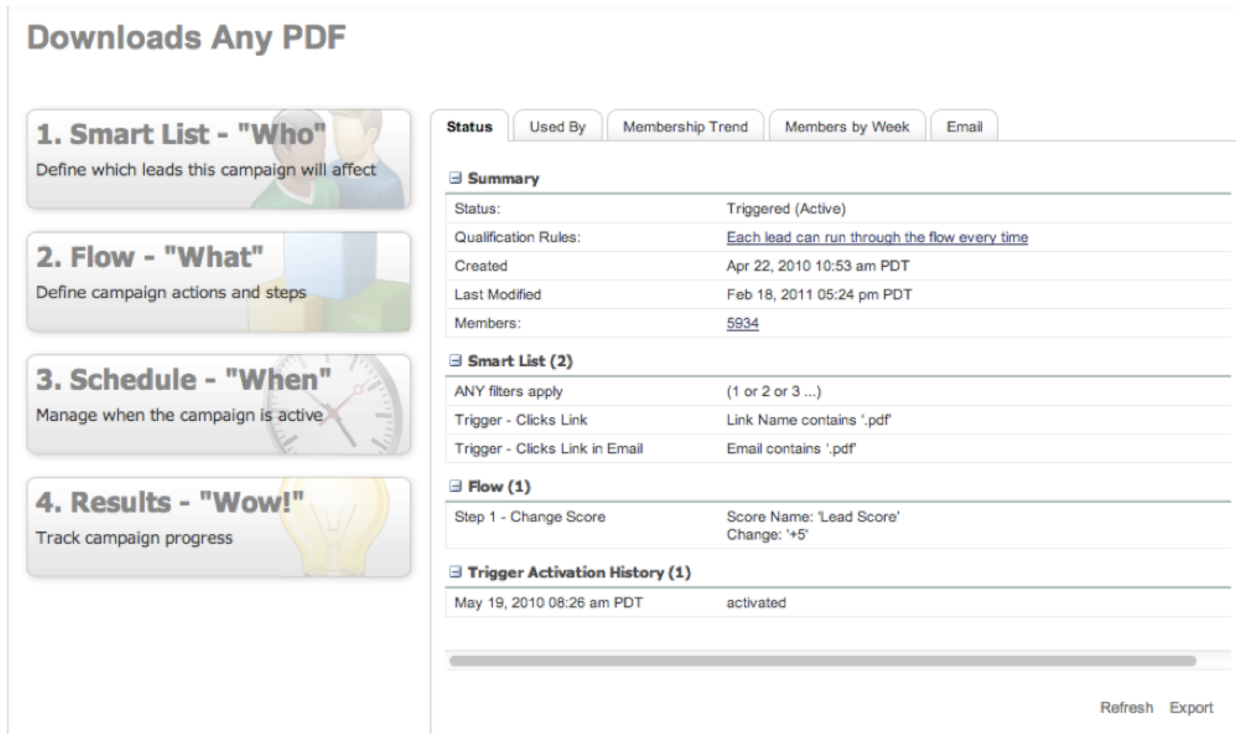


Clicked Link in Email



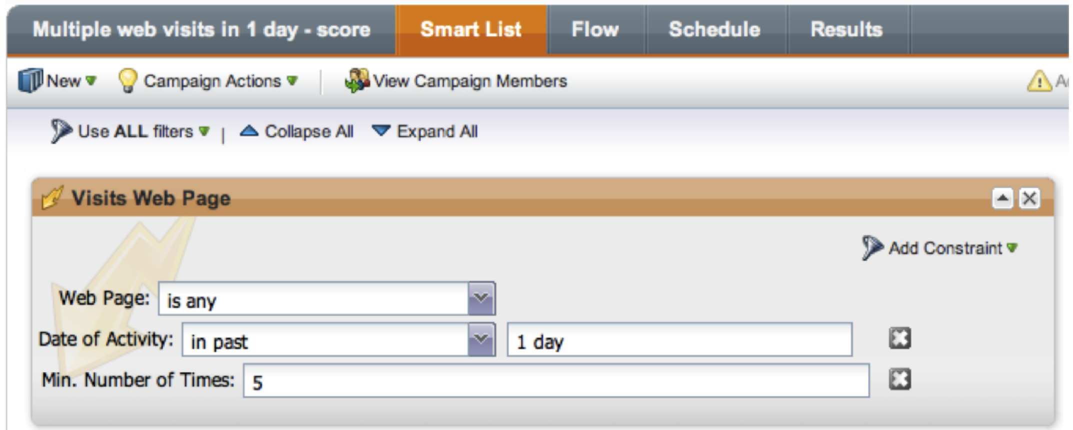
Downloaded an Asset

You can score any asset document, such as a whitepaper, case study, or file using a similar set of criteria. Remember you can do this for files inside Marketo's Images and Files or on your own website, as long as you set the right criteria.



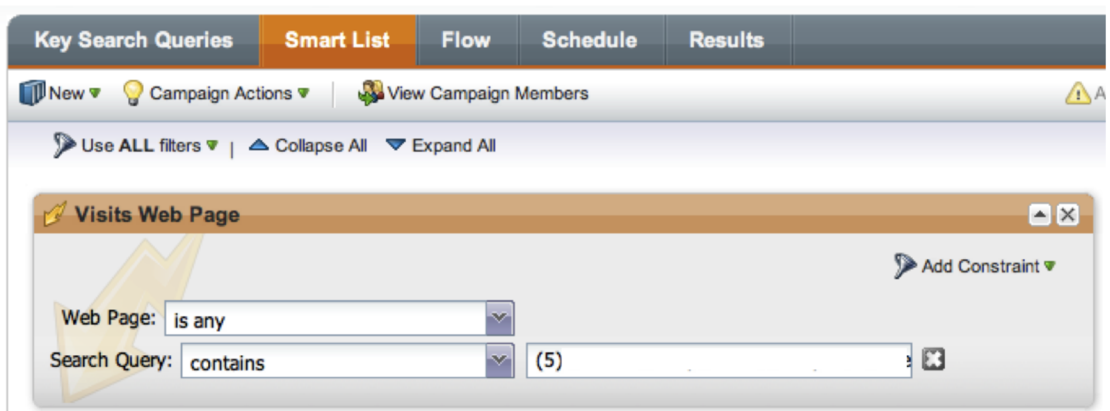
Website Visit

This can be a single page, a specific series of pages, or multiple pages over a certain time frame.



Referrer Source

Such as LinkedIn, PPC, Twitter, etc. Use the Referrer fields coupled with filters or smart lists.



There are a huge number of potential lists and triggers to use. Here are some ideas:

- Attended company event

- Missed company event
- Signed up for Promo Emails
- Bought small amount of product
- Mentioned switching from competitor
- Responded to an email
- Left card at booth

Best Practices

MQL Threshold Tracking

Please log changes to the MQL threshold to ensure the lead flow reporting is managed properly.

Date of Change	Previous MQL Score	New Score	Other Criteria	What/Why Change?	How many leads qualified now?
10/1/12	70	75	No junk, New,	Too many early leads, score inflation	57

Update Process

Updating flows for new papers, collateral, etc.

Remember to update scoring flows if they rely on certain website pages, collateral, or white papers. I recommend reviewing these once a quarter if possible.

Removing old collateral score flows or outdated scores

Is that old white paper from 2007 still on your site? Is it still being scored? Maybe it's time to put old Bessie out to pasture.

Existing scoring systems may have accumulated asset specific scores based on custom Forms or specific events. Invariably you will forget what that did and why. A new employee will be afraid to turn it off despite its clear uselessness. Please go back to disable such workflows after the time has passed.

Over-weighting CXO and Large Firms (via Marketo and Sirius Decisions)

Marketo's Definitive Guide to Lead Scoring mentions data from Sirius Decisions questioning the instinct to score C-suite leads and large firms higher than others leads. As I recently asked a client, "*Do you really sell to the CEO*?" Ask your sales people that. I bet even if the CXO does call, they place the actual work with a subordinate very quickly.

When looking at `Title` and `Function` scoring, know who makes the decision for your solution and who is championing your cause. If you can use Buyer Personas to help determine this difference, then you can score more effectively. You may even want to consider a Buyer Persona field and data workflow to handle it.

Lead Score and Merging Leads and Contacts

Merging leads in Salesforce or in Marketo will sum the scores of the records. So if you have 4 leads each with a Score of 10, the *merged* record will have a Score of 40.

There is no alternative to this action for manually merged records. If you use a tool such as Demand Tools, you can specify the winning score. I recommend taking either the *most recently active* Lead's score or *the highest scoring* Lead's score as the winner.

Resetting or Batch Changing Scores

Occasionally you may want to entirely reset your scores in favor of a new model, or to rescale scores to a new threshold.

Train Sales to Use Scoring

Now that you setup a scoring system, you should go back to Sales (team by team if appropriate) to discuss the model and how it helps them do their job better. Remind Sales that Scoring is based on their input and designed to help them prioritize their lead queue as well as send them only the highest (best) leads. If this is your firm's first time scoring leads, then be sure to ask them for continuous feedback using the Recycle Lead Status or other "rejection" loop. You will constantly tweak the MQL threshold and even scores as you learn more from their real experiences.

I recommend using a Sales Guide to Lead Scoring as a reference for Sales, and especially new salespeople. Please download your copy to modify and follow along here.

Example Sales Guide to Lead Scoring

When you have launched the scoring system, you should have a meeting or two with each sales team to review the scores and the process for handing off leads. A short guide like this will help sales people understand why and how you are doing things. Clearly your process will differ from my experience, so edit this as needed.

Updated: XXXX 2011

Starting in XXXX 2011, Marketing started to score incoming leads, as well as existing leads, on various criteria. This Lead Score is designed to provide an indication of both a Lead's engagement with Company as well as their closeness to our ideal target

The scores are based on the Global Sales Survey where you ranked your likelihood to call someone based on several dozen criteria. We combined this data with knowledge of our clients to form a scoring model.

The Lead Score and other helpful details are provided on the Lead record. Highlighted are areas that can help you when understanding what a lead might like to discuss with you.

It is important to note that the Lead Score is a sum of all Demographic and Behavioral scores. Please check Activity History and Campaign History to understand how the lead is engaging with us.

Marketing finds high scoring leads and passes them from our Nurturing Queue to regional queues for further evaluation. Your regional marketing manager will then pass a Marketing Qualified, high scoring lead to the appropriate territory manager based on their location, company, and requests.

Current Qualification Rule

A lead can only be transferred to Sales when it meets all three conditions.

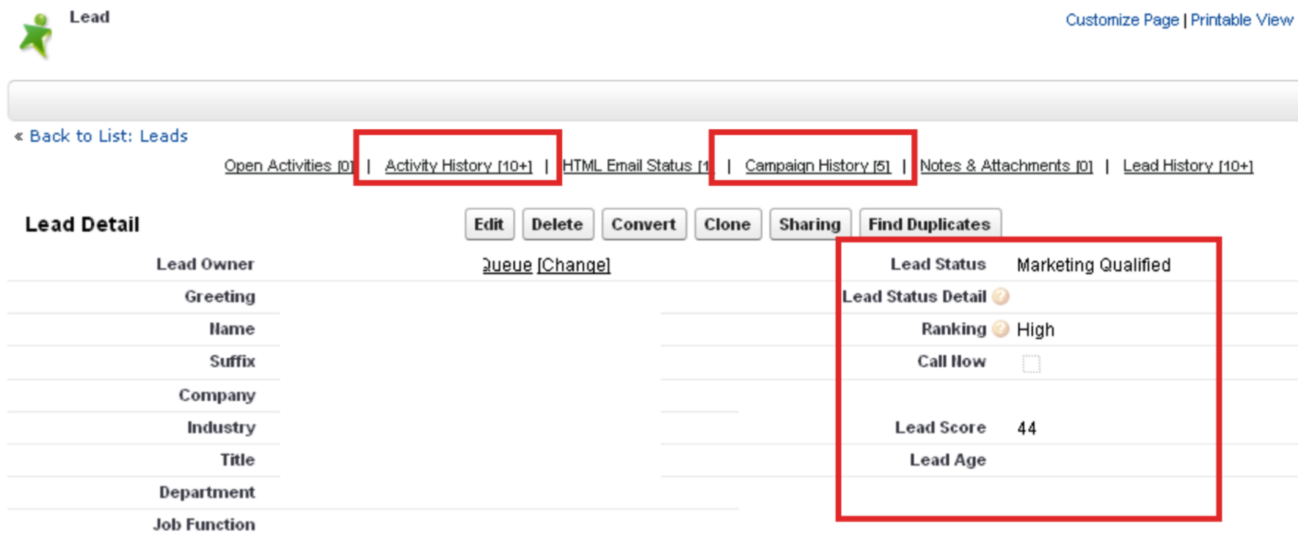
- Score greater than XX (this may change depending on how many leads you need)
- Has opened or clicked any email (this helps ensure we send engaged leads)
- Not a "junk lead" which includes students, bad names, etc.

What does this mean for you?

This means you can receive a lead that first came to us two years ago, *if* they are actively engaged with us. It also means you could receive a lead who came in today who had a great title and company.

Scoring is not 100% perfect, so we are constantly reviewing the model and a human (optional) always checks `Marketing Qualified Leads` (MQL) before passing them to Sales.

When you receive a Lead in Salesforce, check the `Lead Status` and `Lead Score`. You can also find out more about the Lead's engagement with us using the `Activity History` and `Campaign History`.



Lead Statuses: Recycling and Trash

It is important that you `Recycle` or `Trash` leads to help Marketing refine the scoring criteria.

When Marketing or a Salesperson determines someone is not `Qualified` for any reason, we change the Lead `Status`. Each reason code causes a Lead to lose points so that they are not reviewed again unless they become actively engaged again.

Marketing programs will work with `Recycled` leads to determine when they may be ready for a sales person at a future time. `Trash` or "junk" leads will be removed from the database as appropriate. We make every effort to identify junk leads before they reach you, but some leads may get through.

Current Lead Scores

These tables describe the current Scores given for each behavior or demographic item given to us by a Lead. When possible, we augment their data using external systems.

Demographic Scores

What	Why/When	Score Change	How Often?
Country Score *you could also link directly to the Campaign	Target country (no score if not serviceable country)	+5	Once or on change
Employee Range	1-10 11-50 51-500 Over 500	+2 +3 +5 +8	Once or on change.
Industry	Government Mining Investment Banks State Government Software	+5 +8 +1- -2 +5	Once or on change.
Job Title	CXO Strategic Planner Economist Accountant Sales Operations Marketing	+8 +12 +12 +9 -5	Once or on change.
Using Salesforce	Yes No Don’t Know	+10 -2 +1	Once or on change.
Company Name	Global 2000 List Target Account List Major NGO University Federal Government Local Government Trade/Development Agencies	+20 +20 +15 +10 +15 +2 +5	Once or on change.
Personal Email Domain	@gmail.com, etc.	-5	Once or on change

Behavioral Scores

What	Why/When	Score Change	How Often?
Ask a Question	They asked a webinar question	+10	Every Time
Contact Us Form	Requested help/Call Now	+20	Once per Day

What	Why/When	Score Change	How Often?
Event Registration	Registered for any event	+15	Every Time
Event Attendance	Attended an Event	+20	Every Time
Event Missed	Missed an Event	-10	Every Time
Free Trial Request	Requested Trial/Call Now	+20	Once per Day
Gated Download	Filled Out Form for Download	+10	Every Time
Partner Registration	Partner registered for…	+10	Once per Day
Viewed Webinar Recording	Viewed recorded webinar	+5	Every time
Visits Any Web Page	Any web page (not careers)	+1	Every time
Opens Any Email	Opens any email	+1	Every Time
Clicks Link in Any Email	Clicks any email link (not unsubscribe)	+2	Every Time
Unsubscribes	Unsubscribes/Email Opt Out	-10	Every Time
Multiple Web Visits in 1 Day	More than 10 pages in a day	+10	Once a Day
Key Search Term Query	Their first visit found us via our top keywords	+5	Every Time
No Activity in 30 Days	No clicks, opens, visits, or form fill outs in past 30 days	-10	Every 30 Days
Subscribes to Newsletter	Opts in to X newsletter	+2	Each Time
Email Hard Bounces	Matches bad email reason	-20	Each Time

Sales Insight & Scoring

Note: if you do not use Sales Insight, you can skip this section.

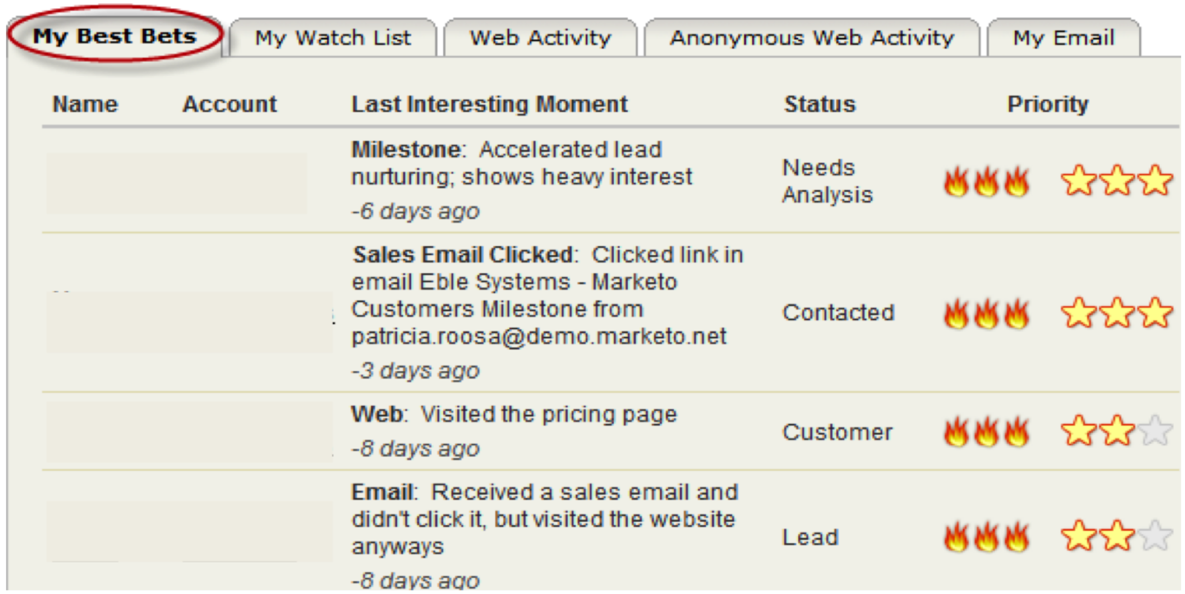
Sales Insight relies on Lead Score and the change in Lead score to show Urgency and Relative Score to the Salesperson on the Lead record within Salesforce. Flames and Stars will not work without an active lead scoring system.

Urgency is a measure of the recent changes in a Lead's score. More activity over a shorter period leads to more Flames.

Stars are a measure of the Lead's score relative to all other Leads.

These scores will show up on Sales Insight on the lead record as well as on the `Best Bets` tabs to help Sales prioritize efforts. You should train your Sales team to recognize Flames, Stars, and Scores to better allocate time among their leads.

Here is what will appear when you click on the Marketo Tab in Salesforce.



Reporting on Scoring

Threshold Analysis

After you are finished with the initial scoring updates, you can use Score Buckets to see where a possible MQL threshold can be drawn. Your first time out will work for a few days, then as behavior scores increase, you will likely need to (1) Increase the Threshold or (2) Increase negative scoring. Keep a close eye on this as you review MQLs, tweaking your model with every flaw you discover.

Score Buckets

Marketo recommends some basic reporting to see how your leads are doing. Use Salesforce or Marketo to bucket leads by score ranges. Here are a few quick examples

Salesforce Report

Step 1: Go to Reports Tab

Step 2: Press New Report

You may want to select `Leads` or `Leads with Converted Lead Information`, depending on your goal.

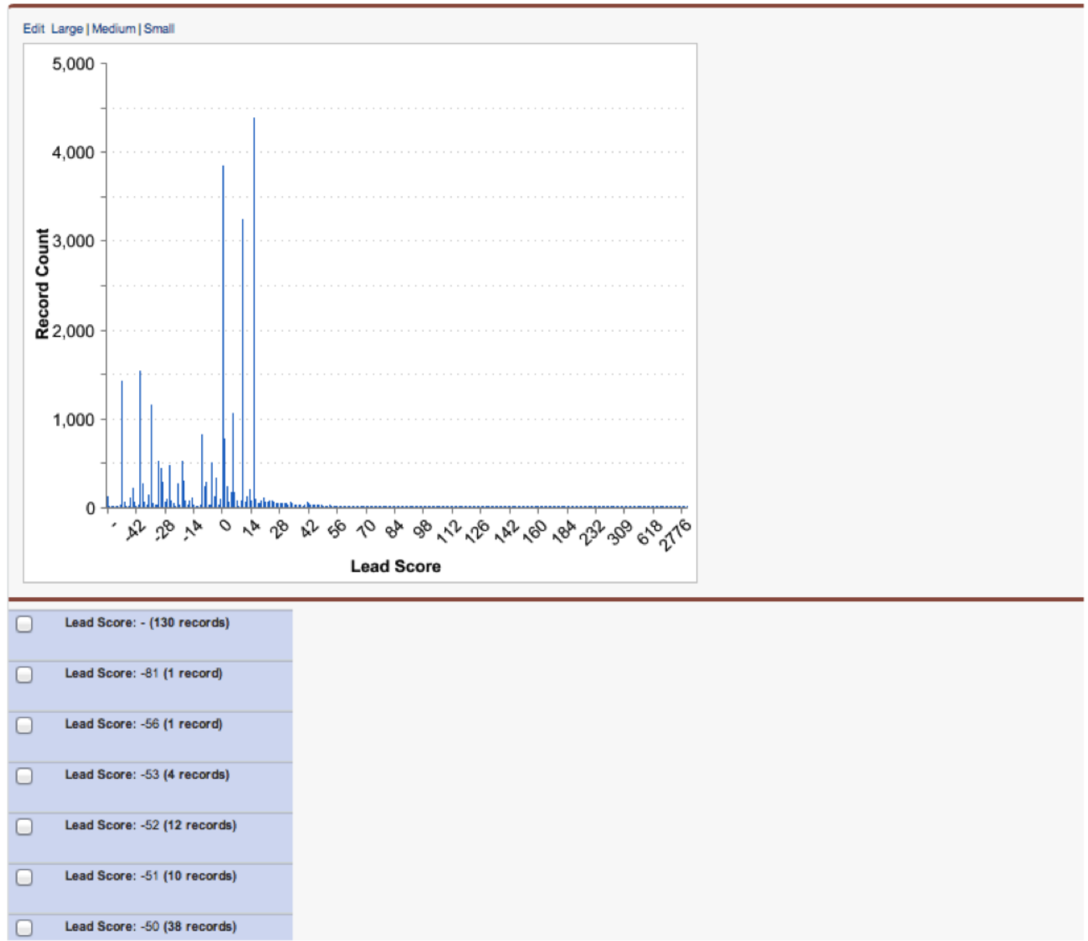
Step 3: Adjust date range and fields

Step 4: Group by Lead Score

Step 5: Add Chart Histogram

Step 6: Press Run

You will have a basic distribution chart and table with all leads in that date range bucketed by score. To take this further to bucket by score ranges, please consult with an SFDC expert.



Marketo Report

Step 1: Go to Reports > Lead Reports

Step 2: Create a new Lead Performance Report

Step 3: Adjust Setup

You should adjust the `Created Date` and other settings to view the desired Leads.

Step 4: Group by Lead Score

Sometimes I Group by `Created Date` so I can see how leads progress from creation until now.

Step 5: Custom Columns

Choose a Smart List to add as a custom column if you want to break down the buckets by Contacts, Leads, or another factor.

Step 6: Smart List

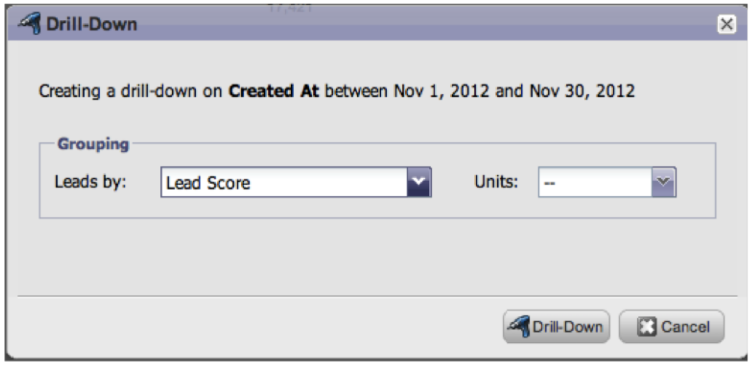
Be sure to exclude test leads. You may want to include all other leads to understand the true distribution.

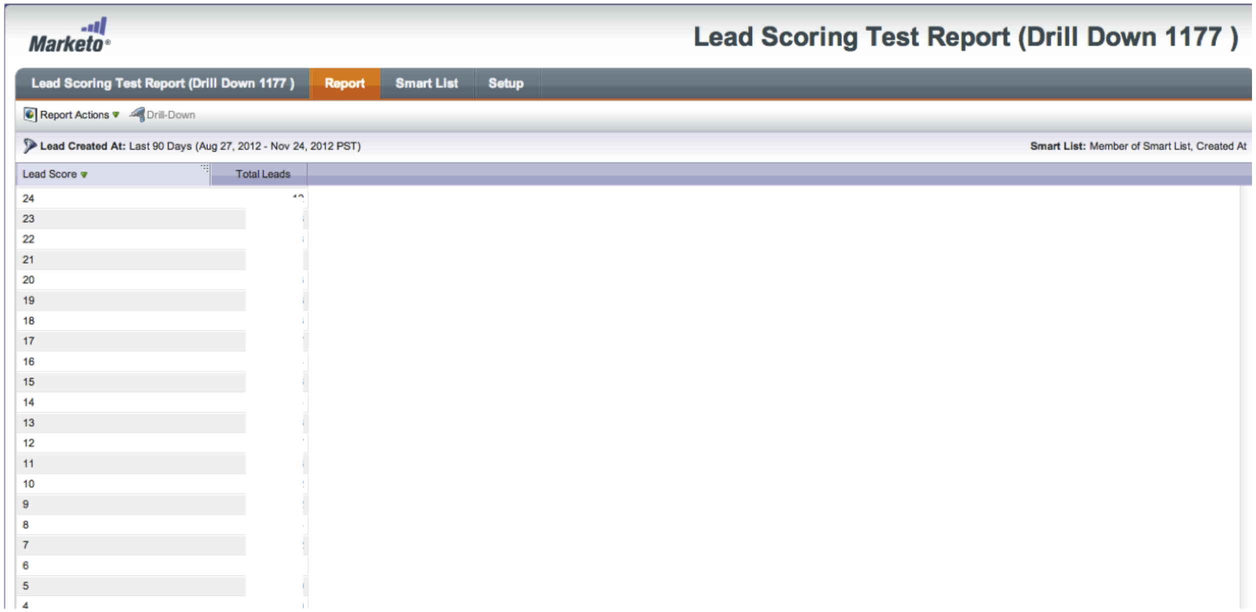
Use `Member of Smart List NOT IN`

Step 7: Run Report

Step 8: Drill Down by Lead Score

Use the `Drill Down` function to go deeper into the `Lead Score` group or the `Created At` group.





Opportunity Analysis

Pre-Score Model Analysis

In this report, you should analyze the data in your CRM before you implement automation or a new scoring model. For all of the Won Opps in the past 6 or 12 months, look at the Contacts (or Leads) involved. Analyze the common attributes such as Title, Function, Location, Territory, and Products to see who is buying. Also examine Lost Opps or Rejected Leads if possible. You may find possibilities for scoring you had not thought of.

- Are Rejected Leads similar to the Won Leads or Lost Leads?
- Which characteristics are common among the Won Opps? Lost Opps?

Buying Stage and Scoring

Using the Marketo's Definitive Guide to Lead Scoring as a starting point, determine your audience's buying cycle and the behaviors they exhibit over time. The best way is to setup a Revenue Cycle Model, although you can run your own Stage model with fields and smart lists. You can create a field and a smart list (or Segmentation) to help watch these leads even if you aren't using RCM.

Step 1: Create a smart list for each stage

For example, `Early Buying Stage, Middle Buying Stage, Late Buying Stage`.

The criteria can be a score range or a set of behaviors. For instance, a Late Buyer would have an open Opportunity. A middle buyer may have reached a score threshold or taken several actions in the past 30 days. It's up to you.

Step 2: Create a field called Buying Stage

You will do this in `Admin>Field Management` which is covered in another chapter.

Step 3: Run a flow for Assign Buying Stage

If Lead is in `Early` or `Middle`, or `Late Buying Stage`, then

```
Buying Stage = Early if in Smart List Early, etc.
```

Step 4: Setup a Trigger Campaign to Capture Score Changes

This campaign will watch a Lead's behavior or score and move someone between each Stage as appropriate.

The other system is to use RCM if your version of Marketo has it. You can then run a Report or Smart List by Revenue Stage and Lead Score to see the counts by Score. If your model is flawed, you may see too many high scoring Leads in earlier stages or bunching up at the MQL or SAL stages.

Lost Opps vs. Won Opps

Each month or each quarter, review disqualified (or recycled) Leads and Lost Opps for scores and behaviors.

- Why did Sales recycle this lead?
- Which behaviors do the Lead exhibit?
- Did the score jump too quickly through website visits even though the demographics were not complete?

Also do this for Lost Opportunities. Your goal is to ensure your system is accurately scoring the behaviors and demographics most associated with creating Opportunities and Won Opps. The model should push the lead over to MQL at an ideal moment for sales to make a deeper connection so they accept the Lead. If you find Won Opps are exhibiting new behaviors or seem to be out of step with the model, it is time to make adjustments.

Buyer Personas

You may also want to see how your scores work with your Buyer Personas. If you setup a field to mark Buyer Personas, you can run a Persona report by score. You may find it interesting to run a pivot table to see which personas is winning revenue vs. their average scores.

ROI of Scoring

Marketo's Definitive Guide to Lead Scoring shows how to calculate the value of scoring, which in many respects is simply managing your leads better. A true scoring system is designed to hold leads back from sales until the scoring (MQL) threshold is reached.

In their example on page 47, Marketo shows a simple table like this:

Metric	6 Months Before Scoring	6 Months After Scoring
Leads Passed to Sales		
Opp Win Rate %		
Revenue per Deal		
Total Revenue		
% of Plan Achieved		
% of Reps Meeting Quota		
Time to Deal in Days		

Your ROI will show increases in Revenue, Win Rates, and Plan Achieved Rate, while lowering your Time to Deals and Leads Passed to Sales.

Lead scoring alone cannot achieve anything on its own. You must use this as part of a larger Lead Lifecycle System where you hold and nurture leads before passing them to Sales.

Changing an Old Scoring Model

Caution: Rescaling is different from changing relative scores.

As your experience with scoring and behavior modeling increases, you may be tempted to adjust the scoring model itself. After a year or two, perhaps the model is no longer aligned to your products, sales teams, or your target audience. Or you may discover in a few months you have hundreds or thousands of leads with scores over 200 that were already rejected by Sales. There are different issues at work here, so you need to decide which ones you should address.

- Score Inflation and Threshold Changes
- Relative Rankings Change (for any reason)

The best discussion on both topics tells us how to take action using the reports above.

Score Inflation and Thresholds

After a few months of scoring, you will likely see many leads well over your MQL threshold, but who were rejected or will never qualify. A lead can certainly pass the MQL *score threshold* without becoming MQL because their demographics don't match your MQL definition. So what do you do?

- Ignore those leads entirely. Their scores will continue to rise or fluctuate on the model.

- Review negative scores to see if there is a common set of criteria you should adjust. For instance, you could decrease scores more for personal emails or bad titles.
- Decrease scores for this group of leads by setting them all to zero.

Adjusting your threshold MQL score should be done only if you are feeding too many leads to Sales who are either rejected too often, or they cannot keep up with the volume.

Rescaling Scores

If you are using a weighted average model, where the points contributed to MQL are fixed, then you may want to rescale the scores from 40 to 100 since thinking in 10s is easier.

- Demographics: 40% of score, or 16 points
- Behavior: 60% of score or 24 points.

To adjust the scale, you will need to multiply by 2.5. If you are rescaling, then you will also need to adjust the individual Score flow steps by the same proportion.

Thanks to Kelly Farrell and Eric Hollebone for outlining these steps.

Step 1: Export Leads

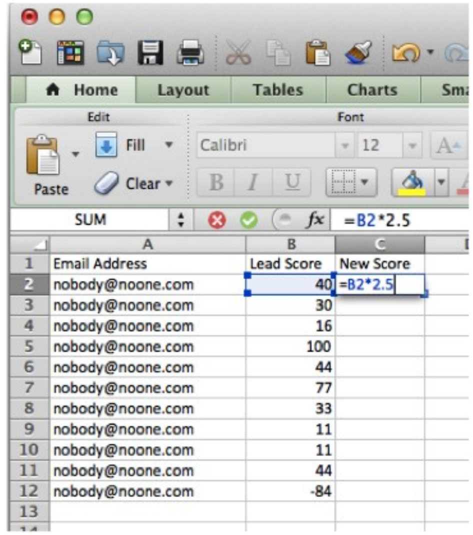
With `Lead Score` and `Email Address` as your columns.

Step 2: Open the exported list in Excel

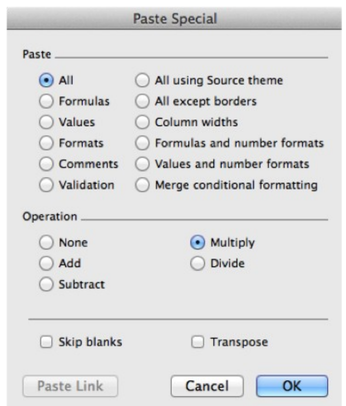
Step 3: Create a new column "New Score"

Step 4: In the New Score column, conduct the math.

You will use the formula `=B2*2.5` and then drag the formula down.

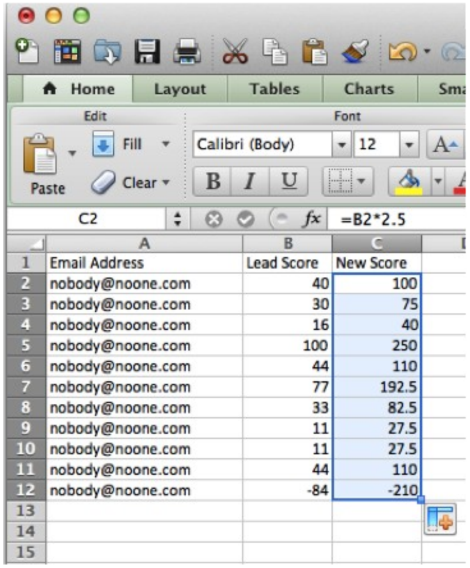


If you do this, you will need to copy and paste this column with `Paste Special and Values`.



- You can also enter in 2.5 in another cell
- Copy it
- Then select the Lead Score data
- Right click "`Paste Special`"
- Select `Multiply`
- Press Enter

- And the math is done.



Step 5: Delete the Lead Score column

Remember to be careful of the Values since New Score is a formula dependent on Lead Score.

Step 6: Rename the New Score Column to "Lead Score"

Step 7: Save As CSV

Step 8: Call this file "New Scoring Model Scores"

Step 9: Create a new Static List called "New Scoring Model Reimport"

Step 10: Import the CSV file from Step 7

Marketo will *overwrite* the `Lead Score` for each matching email address. So be very sure you want to do this. If anything goes wrong, you can always re-import the original file.

Step 11: Verify the new scores are in Lead Score

Once you are done, the scores will sync over to Salesforce.

Relative Rankings Changes

If you find your audience or model needs adjustment, then you may need to revisit how each behavior or demographic is scored. This is fundamentally different than Rescaling Lead Scores to match 100%.

Rescaling vs. Relative Scores

As Clinton noted in the key discussion, you can rescale your scoring system with a multiplier (or divisor) to reset the scores to be out of 100 instead of out of 40. The problem, as Clinton notes, is your relative ranking of behaviors *does not change if you also multiply your scores by 2.5*. So if you indeed want to adjust the relative rank of behaviors and demographics, you need to go back to the start of this chapter to revisit the merits of each behavior and demographic factor.

Clinton also noted that if you rescale both the Lead Scores and the flow action Scores, your scoring system doesn't change on a relative basis. For example, if you rescale from 40 points to 100 points, the following happens:

- `Form Fill Out` (old): +10 will yield a MQL at 4 form fill outs so…
- `Form Fill Out` (rescaled 2.5): +25 still yields MQL at 4 form fill outs.
- But if you forget to rescale `Form Fill Out +10`, then it takes *10 Forms* to reach MQL.

Your situation may be a matter of relative rankings for scores. If `Fills Out Form` is no longer as important to qualification or Closed/Won as `Request a Call`, then you need to change the relative scores:

- `Form Fill Out`: +7
- `Request a Call`: from +5 to +10

Use the techniques covered earlier to perform a Scoring Audit once a year to make sure you, Sales, and the audience are on the same page.

Case Studies

Podio

[Podio's presentation at the Marketo Summit 2012](#) showed us how they use the SOAP API to score in product behaviors such as using or not using their free trial. These triggers activated reminder emails directly as well as inside Podio, as if they could speak directly into the system. Sales also received these comments in a custom CRM, allowing different types of nurturing, both automated and human. Podio extended its product's capabilities using Marketo.

Citrix Predictive Scoring Model

Eva Tsai, Director of Marketing Operations at Citrix presented her [Predictive Scoring Model]() at the Marketo Summit 2012. Eva and her team are hard-core data junkies with an impressive system. Essentially she went back through mounds of data to determine if the scoring model worked, showing some Score Rules were not needed while others accurately predicted sales. I highly recommend reading the slides and slowly replicating Eva Tsai's plan after about a year of data collection.

Step 1: Pipeline Contribution Throughput

Establish your funnel or RCM with appropriate reporting for each stage and conversion rates. Your goal is to move qualification up the funnel to Marketing while optimizing scoring.

Step 2: Information Capture

Using Marketo, you will already capture demographic details.

Step 3: Profile Leads (Buyer Personas)

Create Buyer Personas appropriate for your organization.

Step 4: Behavior for Personas

Track and measure the behaviors at the Lead and Persona level.

Step 5: Establish Scoring Model (see above)

Using this guide, establish a scoring model. Your goal is to optimize this as you gather more data. Remember that if you use more scientific relative rankings, you will use less "art" at this stage.

Step 6: Understand Your Sales Funnel Over Time

You will need to establish reporting to develop at least 1 year's worth of data to begin validation.

Step 7: Statistical Sample Design

If possible, select an appropriate random sample of Contacts to test for Opportunity Wins.

Step 8: Validate Scoring

Analyze the variables. Citrix used 327. This will depend on your firm. Once you know which scores are predicting Won Opps, you can also weed out scores that do not predict.

Step 9: Increase Sales Productivity

- Watch regional differences
- Decrease lead volume and achieve same opportunity flow. This will save you money or free up money to invest in programs targeted at predicted buyers.
- Increase opportunity pipeline with same volume of leads

Chapter Review

Self-Quiz

What is a demographic score?

What are examples of behavioral scores?

Why should you avoid back scoring behavioral triggers?

Recommended Resources

Marketo Documentation

Definitive Guide to Lead Scoring

Sales Insight Fundamentals

Basic Scoring Setup

Lead Scoring Glossary

Marketo Community

Merging records and adding scores

Changing an Old Scoring Model

Old Scoring Model, Scaling vs. Thresholds

Changing Scoring Models

Clicks Link in Email and Scoring

Scoring and Segmentations

Comparing Scores

Citrix and Predictive Lead Scoring 2012

Lead Scoring Using Programs: Yes or No

Creating Lead Score Fields

Flawed Lead Scoring [Sirius Decisions]

Account Scoring [Sirius Decisions]

Tools

SurveyMonkey
Relative Ranking Sales Survey Starter Kit [PDF]
Lead Score Planning Tool [XLSX]
Sales Guide to Scoring [PDF]

Experts

Aberdeen Lead Scoring Prioritization

Sirius Decisions

The Pedowitz Group (Nic Zangre and Scott Benedetti)

Lead Lizard (Sam Boush)

Elixiter (Andrew Hull)

Chapter 12. Data Management with Marketo

At a Glance

Overview

One of the reasons you selected Marketo for your automation needs is its powerful data management tools. With a few well chosen campaign workflows, you can automatically manage lead records with almost no intervention. When I did this for managing MQLs and Trial Autoresponders, I saved my team at least 40 man-hours per week. At $100/hr, I saved $208,000 in value for use on other projects.

So what are you waiting for? That $208,000 is not just going to drop from the sky. Let's get started.

Deduping Leads

With all the talk about deduping, MS Word still doesn't know it is a valid word!

When you selected Marketo, you were looking forward to its automatic deduping capabilities, reducing the number of records in your database, reducing manual merges, and keeping better track of your audience. The reality is somewhat different because while Marketo can do much of the heavy lifting going forward, dupes still get created. The good news is there are ways to minimize dupe creation while also automatically merging records.

Marketo's Deduping Capabilities

While Marketo includes automatic deduplication by email address, it does not do this for records prior to your first sync or records, which first appear in your CRM. Marketo (and I) highly recommend deduping records before your first sync to have the cleanest and fastest possible setup. Your SFDC Admin can recommend the best method for your business and budget or you can follow my suggestions below.

Handling Duplicates

Marketo can automatically dedupe leads based on `email address.` The dedupe works only when you enter new leads into Marketo from:

- List Import
- Marketo Form (iFrame or Marketo Page is ok)

- Direct creation in Marketo database.
- Direct creation through API.

Thus you should do your best to create new leads using the above methods.

How Duplicates Are Created

Of course, people will always create new leads directly in the CRM. These create duplicate records and there are specific rules and situations where this happens.

Lead Duplicates

These usually occur in your CRM or because you are not syncing all Leads to the CRM.

Contact Duplicates

An existing SFDC Contact can force Marketo to create a duplicate Lead if

- Someone created a new SFDC Lead for that email address.
- The Marketo User is not seeing Contacts correctly.
- There are previous SFDC dupes of both record types.

Preventing Duplicates

To prevent duplicates, take the following actions:

- Always use Marketo Forms or the API.
- Sync All Leads to SFDC.
- Import all lists into Marketo using Normal.
- Train Sales SFDC Users to search for leads first using email or Full Name and update an existing record.

Handling Deduplication

Marketo offers a few ways to help you dedupe.

Merge in Marketo

If you use the Merge function in Marketo, the Leads are merged. The activities are merged while the Lead Score is added together. An SFDC Lead will be Converted and attached to an SFDC Contact.

You can also try Marketo's Easy Merge Tool: (Paid).

Merge in Salesforce

If you manually merge SFDC Leads and Contacts, then the usual SFDC rules apply. In Marketo, the two records are merged, the Scores are added together. If the winning lead has a field value of NULL, then that field will be NULL after the merge. Converting a duplicate Lead and attaching it to an existing Contact has a similar result.

The same rules apply if you use a tool like DemandTools for a mass merge.

Stefan Massy at Marketo makes this suggestion:

> *"One suggestion/precaution I would give is when you do the merge in Salesforce ensure that you are logged into Salesforce with your Marketo sync user. Often times you may be logged in with a Sys Admin (who has full access) and the merge occurs but the issue may be that your Marketo sync user does not have the same permission as the Sys Admin user and your merge may not be reflected in Marketo."*

Duplicates, Updates, and Email Permissions

A common question is "If I have duplicates of the same email, can that person continue to be sent emails if just one record is opted-out?" The answer is yes, and no, depending on the situation.

- **How do I know which record will be updated**? Marketo will update the most recently updated record of any group of duplicate Leads. So if you have 5 duplicates and the Lead fills out a new form with a matching email, only the most recently updated record is updated.

Duplicate Records Qualify for the Same Campaign

Sending email to duplicates: if duplicates qualify for the same campaign, Marketo checks for email duplicates and only sends 1 email out. The email activity is attributed to the most recently updated Lead record.

If you have 5 records with the same email address, it is possible for all 5 to qualify for a smart campaign. If this happens, Marketo dedupes based one email address to send only 1 email per email address.

If one of those email addresses is also opted out, then Marketo will not send any email to that address.

Your Qualified Count and Blocked Count will not match in this situation.

One Record Qualifies, But Others Do Not

If you have 5 records with the same email address (or even the same person with different email addresses), it is possible only one record will qualify for a campaign.

In this situation, the qualified record could be opted-in, while the others are opted-out, which means the email will go out.

Unsubscribed on One or More Records

Only the most recently updated Lead record will be unsubscribed and it may be possible to send out email if the other subscribed records qualify for a campaign. If both an Unsubscribed and Subscribed Lead qualify for the same campaign, no email will be sent.

Remember that if someone registered with a corporate email and previously with a personal email, those are not duplicate records to Marketo and it is possible to keep sending that person email on either account.

Solutions

Always setup a standard Smart List and static suppression list that includes all opted-out leads. Be sure to include this list as NOT IN on all email campaigns to exclude all opted-out leads.

Holding Back Leads from Marketo

Generally, new leads, which enter Marketo, do not automatically sync to SFDC unless implicitly or explicitly told to do so through a SFDC flow action. I prefer to sync all data, but doing so requires Queues to avoid sending large numbers of unqualified leads to Sales.

One way to prevent Marketo from re-syncing that group of leads is to remove a value that is required in SFDC. If Company, for instance is not available, SFDC will reject the insertion.

You could also setup a system where a secret SFDC required field is auto turned on for new leads, but set to OFF for those SFDC Is Deleted leads unless you decide otherwise. For instance, if one of these old leads comes back to request something or re-subscribe, then the system resets the SFDC OK field to True, then syncs the lead.

A Deduping Process

Here is my recommended deduping process:

1. Import Lists into Marketo.

2. Merge Records in Marketo using the Duplicate Fields filters.
3. In the CRM, use DemandTools (or a similar service) to identify dupes using fuzzy logic. Break this down by each territory and ask Sales to check off the master record. Then merge automatically.
4. Individually: ask someone to do this for you. I always Merge Leads first, then attach any duplicate Lead-Contact pairs to the Contact record.

If you are looking for specific rules over which fields to choose to override, I usually do the following:

- Prefer Older Record over newer.
- Prefer more complete record to less complete.
- Choose the most recently updated field over the older field.
- Average the scores (although Marketo adds them).
- Use the score of the more recent lead.

Deduping Tools

There are dozens of deduping tools to help you automatically prevent dupes or clean up dupes. Here are my favorites.

Demand Tools

Demand Tools offers a full suite of options and tools. This is the most popular and most powerful option available to SFDC users. One of my clients uses Demand Tools so much; they weren't even uploading to Marketo. I have also used it to walk through exports of dupes, selecting the master record, and then running a process to merge the records. The tool has a variety of matching options, including fuzzy logic, to find, capture, and merge dupes of all types. It handles Leads/Contacts/Accounts and includes the PeopleImport tool to help stop new dupes.

The drawbacks are price and it does not prevent manual dedupes. Pricing starts at $5,000/yr for one SFDC Admin. Find it on the AppExchange.

ReachForce

ReachForce is becoming wildly popular among Marketo users (even Marketo uses it). Their Data Cleanse service helps identify dupes, merge them, and then append ReachForce data to records so your database is fresher. ReachForce also offers a popular Web Form Conversion tool to allow leads to standardize their data before it even enters the database.

RingLead

RingLead has several options available to Salesforce and automation users. The Marketo integration is available, but its full features are not listed. DataCleanse seems to have less power than DemandTools, but it is cheaper and an improvement over native SFDC options.

- RingLead Cleanse $999 and up
- RingLead Unique Entry Warning (SFDC) $4.99/user-month
- RingLead Marketo Integration (you must call for details)
- RingLead Duplicate Removal (AppExchange) $999 and up

ActivePrime

ActivePrime's CleanCRM service cleanses your database of dupes and prepares it for CleanEnter, a pre-entry dupe catcher for manually created records. They also have additional data services.

Contact: sales@activeprime.com 617-247-9908

Stratus Cloud Solutions

Stratus Cloud Solutions' Data Cleanser suite offers a more powerful manual tool, akin to Salesforce's Find Duplicates feature. They do claim cross-object deduping, including for custom objects, so it could be useful for unique situations. The fee is $1,999/year for unlimited users, but to me, this is expensive compared to what other tools are offering.

My Recommendations

I recommend exploring Demand Tools, RingLead, and ReachForce to learn more about how they can help you. Each situation is a bit different and your budget and skills may not warrant Demand Tools. It might be worth considering a Marketo Dedupe or ReachForce service, if this is a one-time deal. For a long-term solution, you could try running RingLead's Unique Entry alongside DemandTools or RingLead Data Cleanser.

Ultimately, a human, possibly an intern, will have to go through the database to help merge records. It is not pretty, but it will help keep things running smoothly. If you make this a monthly or quarterly practice with your team you will stay ahead of the game. Some firms hold data cleansing parties once a quarter (with pizza!) where Sales and Marketing sit down for a day to clean up Marketo and the CRM. You will find it easy to resolve conflicts or data confusion if everyone is in the same room or GoToMeeting.

Standardizing Data

A common question on the Community is "How do I automatically fix bad data?" A fun and fast way to save time (or quickly ruin your data) is to use Marketo campaigns to monitor then update data. I will show you a few examples you can copy or modify to suit your needs.

Please be careful with these powers as you can easily change Leads and Contacts, which may affect reporting or Salespeople. I recommend modifying SFDC Leads only in most cases until you feel comfortable making other mass changes.

Country Name Changer

If you have a database, you likely have all sorts of values in your Country and State fields. Even if you enforce ISO Country Names, your old forms may not. Your sales team may still be able to type in what they want. The same is true for full state names versus abbreviations.

Adjusting Existing Country Names

The first, best way is to ensure there are few ways for bad data to enter these fields. To make this happen, work with your CRM Admin to set Country and State values to the ISO list provided below. Make sure you cannot manually enter data into that field in your CRM.

For the automatic flows, you may want to choose the most important countries or errors to correct. E.g.:

`UK → United Kingdom`

`USA for US or United States or United States of America`

And for similar combinations.

Step 1: Create a New Campaign Called "Country Name Changer"

You would place this in a folder called Data Management or Standardizers.

Step 2: Smart List

There are two choices here: Batch or Trigger. I tend to prefer Batch campaigns for this work because I can periodically go to see the next run's count that will tell me if other data cleaning efforts are working. With a Batch campaign I can also reduce the overall load on the system.

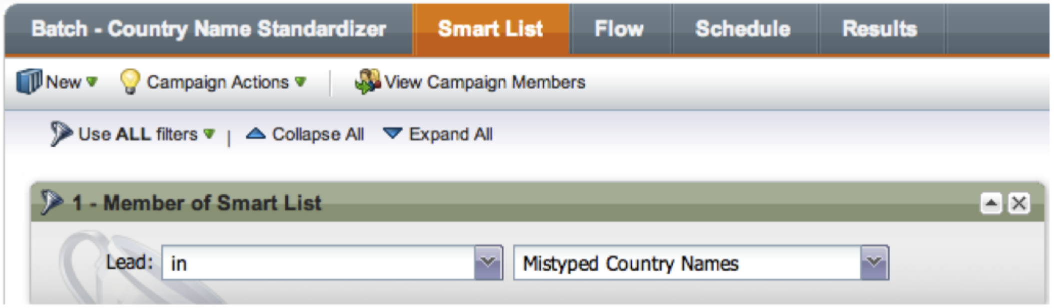
You will have to review a list of leads to see the common misspellings or errors to make this work. Every database is a bit different.

Option 1: Trigger with

```
Data Value Changes: Country
```

Option 2: Batch with a Smart List like:

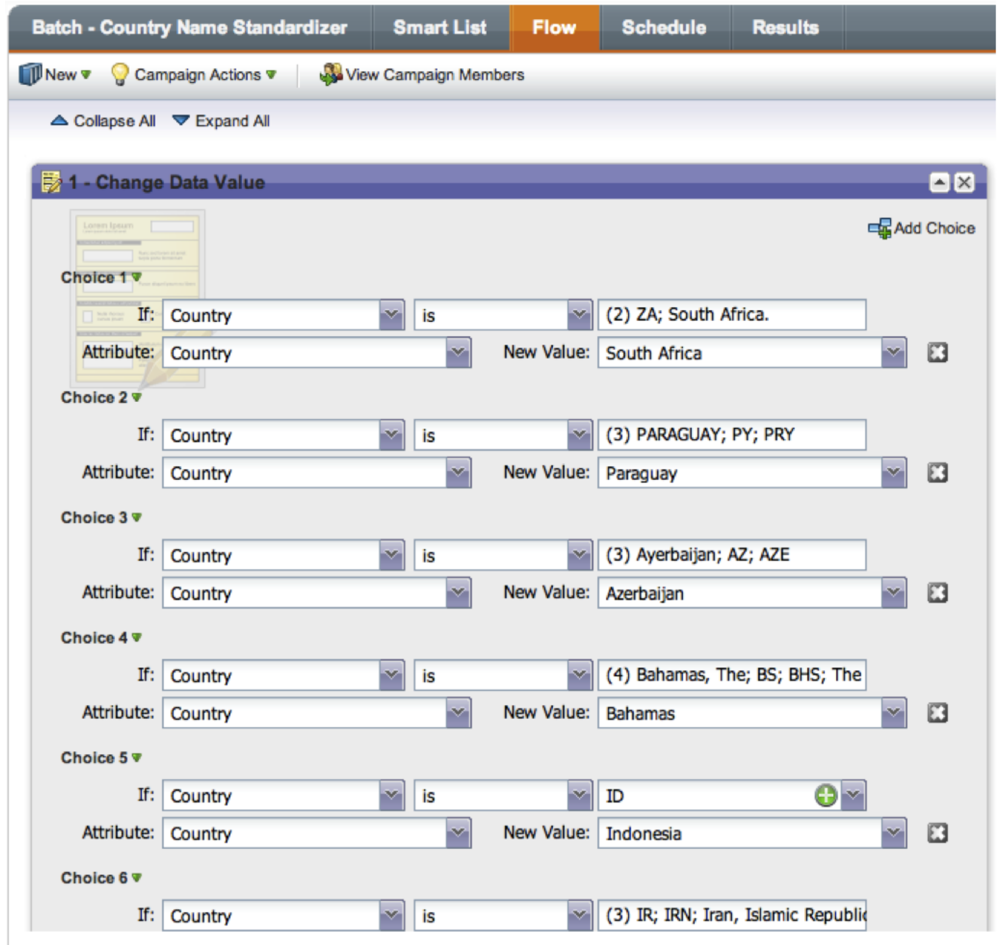
```
Country IS NOT Empty
Member of Smart List IN Mistyped Country Names
```



Step 3: Flow

Change Data Value:

```
Choice 1: If Country IS (USA, United States, U.S.A) then New Value of Country IS US
Choice 2: If Country IS (Singapura, Singapore, Spore) then New Value of Country IS SG
Choice 3…
Default: Do Nothing
```



In this type of Flow, you can have multiple options. You may want to restrict a campaign to a specific continent or region to reduce the overhead and choice list as more than 7 choices slows down Marketo's display engine and processing.

Step 4: Schedule

Run Every Time

Schedule Recurrence at 2:15am each night.

(Or Activate if you set this as a Trigger)

Filling in Blank Country

You may also encounter Lead without Country or State filled in. Your Forms may not force these values; your list import from that Trade Show may have missed it; or SFDC is not enforcing this value. In any case, you probably want to know a Lead's geography as early as possible to improve routing and messaging. The good news is you can enhance these Leads with Data.com or Marketo's own Inferred Fields based on IP address data.

Step 1: Create a New Campaign Called "Blank Country Fixer"

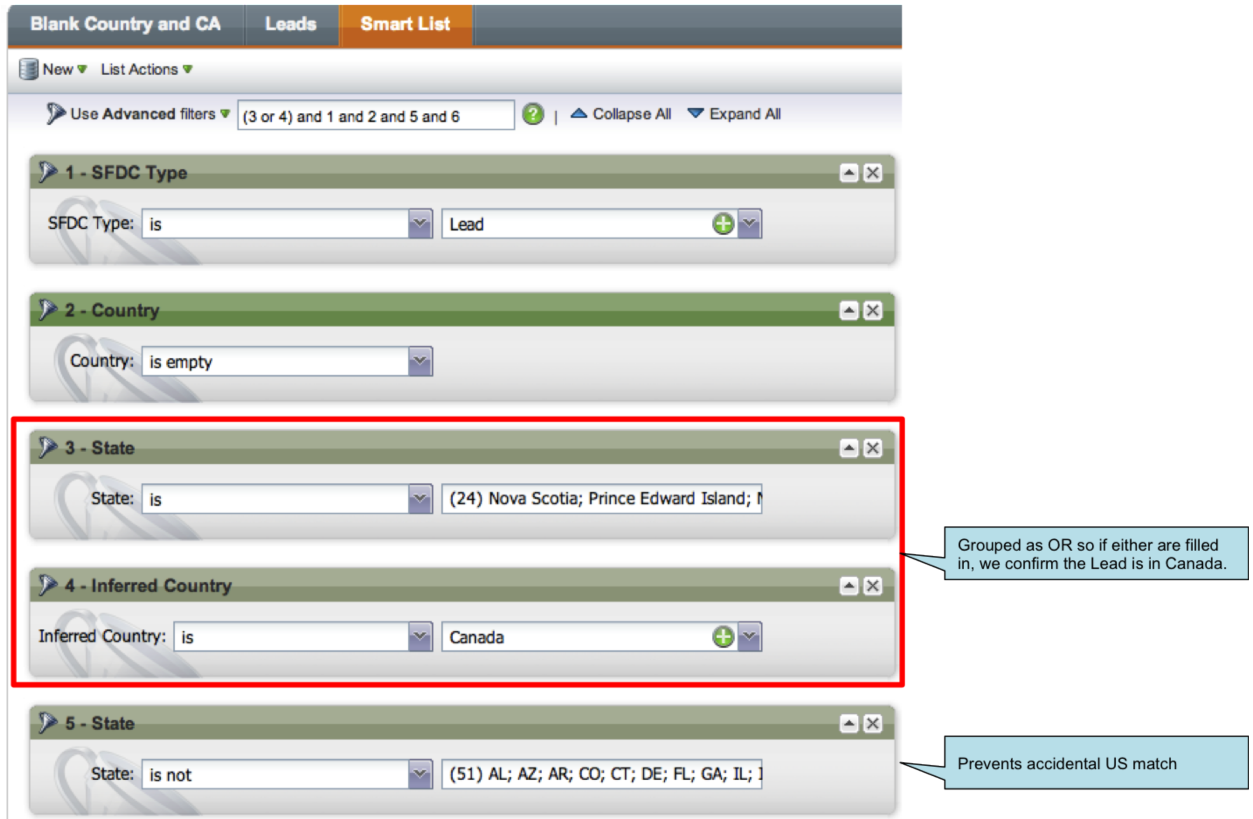
You would place this in a folder called Data Management or Standardizers.

Step 2: Smart List(s)

There are a few ways to match Inferred data to actual values. I recommend creating several Smart Lists in the Lead database before placing them into the Campaign itself.

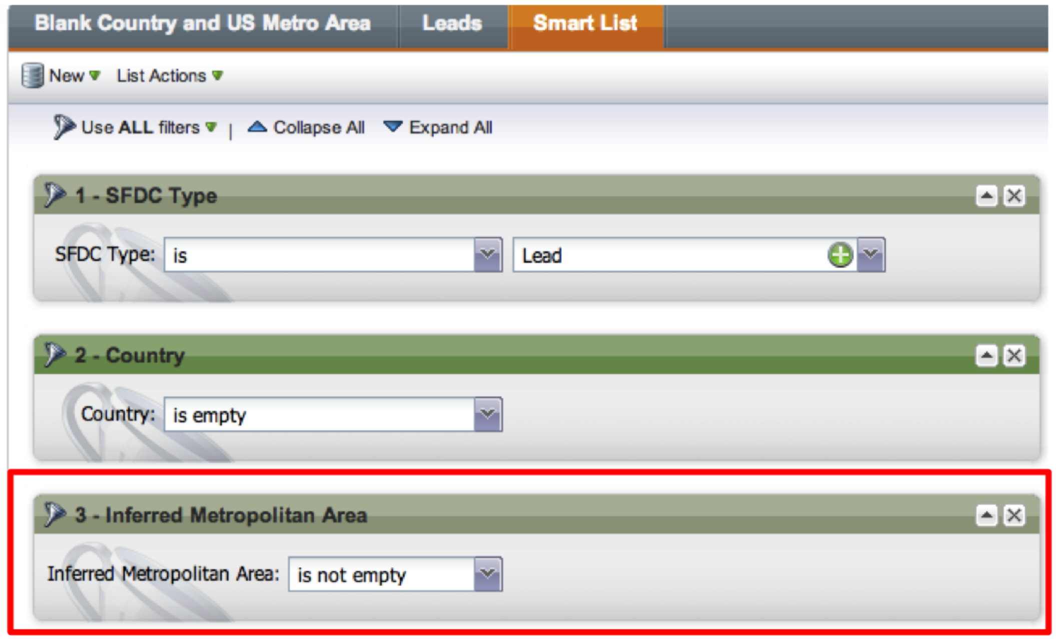
Blank Country in Canada

In this list, we want to find leads who are likely in Canada. This list uses both `State` matching and `Inferred Country` to find possible Canadian leads. Notice we are also careful to exclude US States, which we could do with `Inferred Metro Region` or other fields if needed.

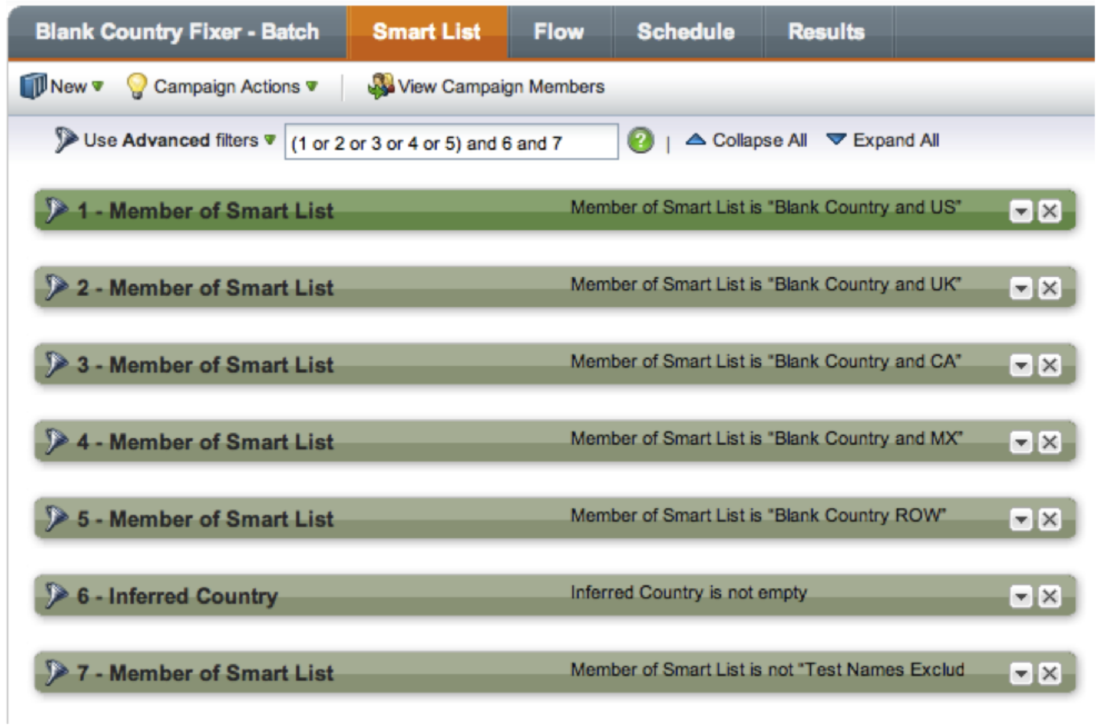

Blank Country and CA
Leads
Smart List
New
List Actions
Use Advanced filters
(3 or 4) and 1 and 2 and 5 and 6
Collapse All
Expand All
1 - SFDC Type
SFDC Type: is
Lead
2 - Country
Country: is empty
3 - State
State: is
(24) Nova Scotia; Prince Edward Island;
4 - Inferred Country
Inferred Country: is
Canada
5 - State
State: is not
(51) AL; AZ; AR; CO; CT; DE; FL; GA; IL;
Grouped as OR so if either are filled in, we confirm the Lead is in Canada.
Prevents accidental US match

Blank Country in US

In this case, we want to select Leads whose Country IS EMPTY and who have an Inferred Metropolitan Area (this is US only) which we can use later to determine if they are in the US.



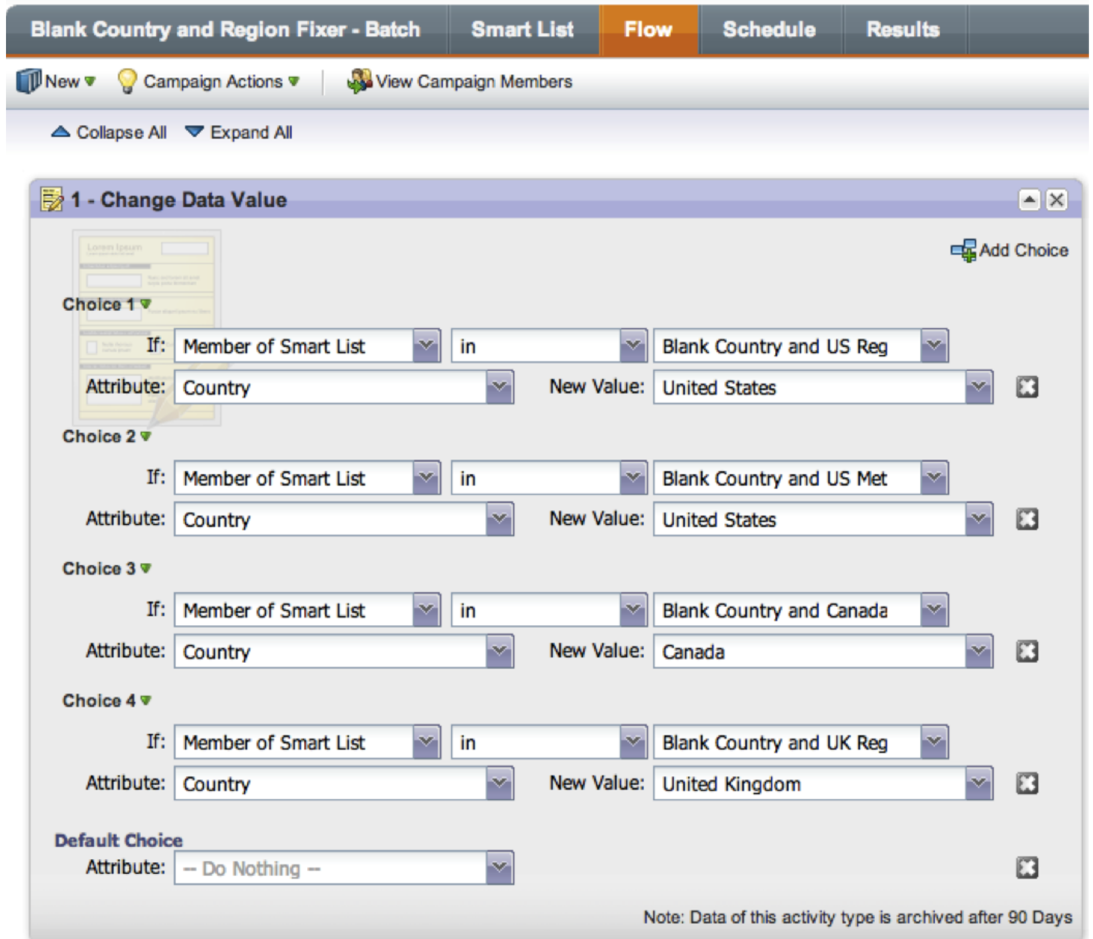
For this example, we will create several Smart Lists like the above and place them into one Campaign. For efficiency, I have taken in as many of the blank Country smart lists as possible since I know each one will match the right country during the Flow.



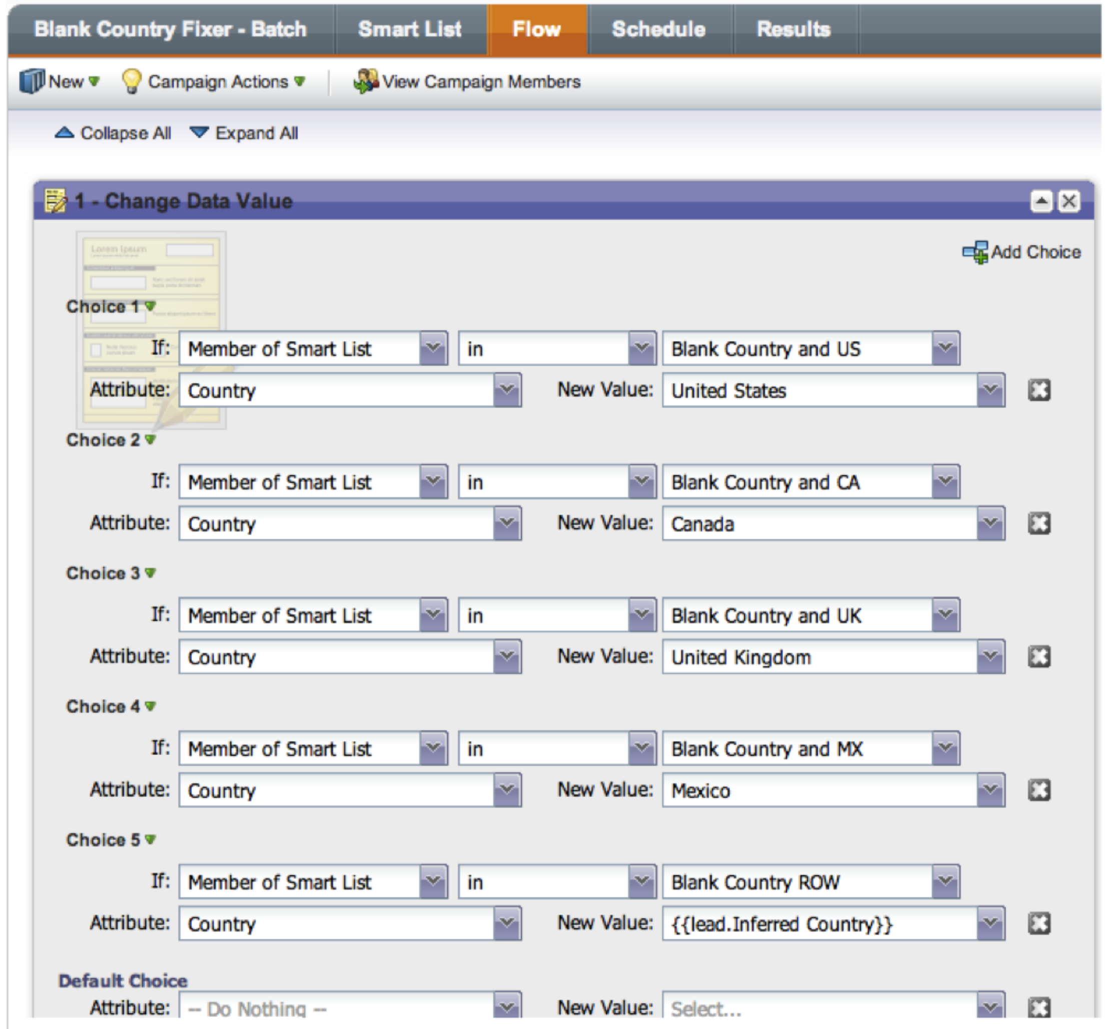
Note how we included leads where `Inferred Country IS NOT EMPTY` to ensure we can match values.

Step 3: Flow

The Change Data Value flow step is our workhorse here, taking in the various Smart Lists and making a quick Country change based on that list. One version of this Flow handles just specific Smart Lists.



Another version of this Flow takes the `Inferred Country` value as a token to insert in the `Country` field if the Lead did not match the other 4 better defined Country Smart Lists.



Step 4: Schedule

Qualification Rules: Once

Schedule Recurrence: Daily at 3:00am

You can also clone this campaign to create a `State/Province` version or even to help fill in possible Area Codes. If you are selling other internet services, you can easily use the Inferred ISP as part of your messaging.

State Changer

The State/Province Changer operates in the same way as the Country Changer. This is useful if parts of your system are not enforcing ISO State Codes or your preferred data values.

Step 1: Create a New Campaign Called "State Standardizer"

You would place this in a folder called Data Management or Standardizers.

Step 2: Smart List

Use an existing Smart List or set the filters like this:

To Convert Full Name to Abbreviations:

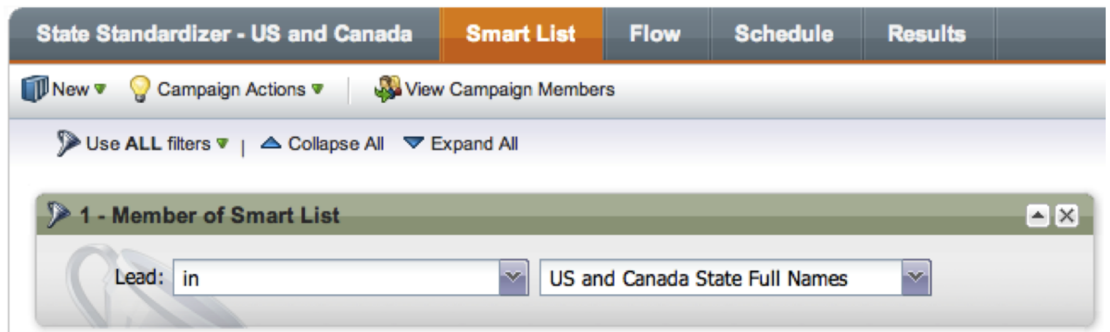
`State IS (Delaware, New York, …)`

`State Contains (N.Y.; Delawa;Penna;Calif;…)`

To Convert Abbreviations to Full Name

`State IS (PA;MD;NY;NE;…)`

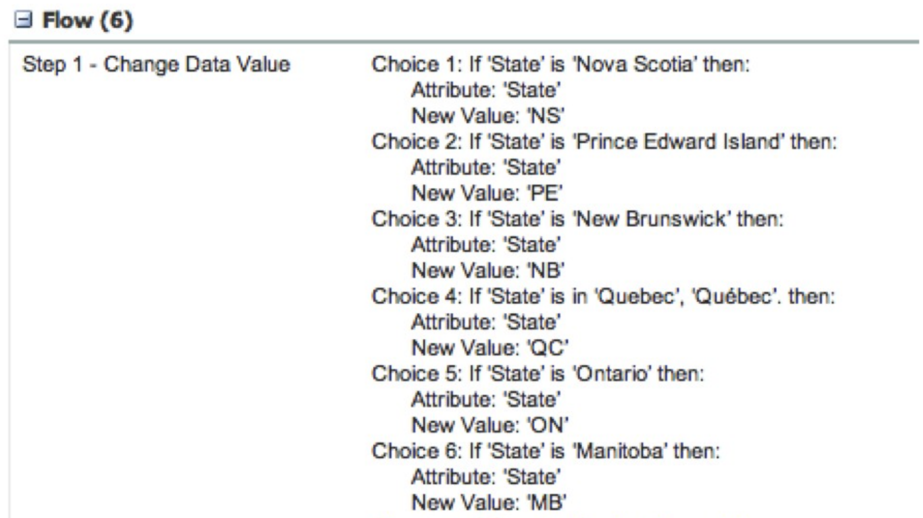
`State STARTS WITH (NY;NJ;CA;WA…)`



Step 3: Flow

```
Change Data Value
Choice 1: If State IS (New York, N.Y.) then New Value IS NY
Choice 2: if State IS (New Hampshire, N.H.) then New Value IS NH
```

In the example below, we match on full State name, then adjust the value to the ISO State Code.



Step 4: Schedule

```
Qualification Rule: Every Time
Schedule Recurrence: Daily at 2:30am
```

Picklist Changes: Employee Count Updates (old to new)

Best Practice: Stagger batch campaigns working on the same field so subsequent flows catch the missed leads from the earlier ones.

Occasionally picklist values may change for reporting purposes or other business needs. One change is to modify the reported `Employee Range`. Since territory and priority decisions are often made on this field, getting it right is important. (You can use this example for any field).

In this example, we want to migrate our Employee Range field to a new picklist:

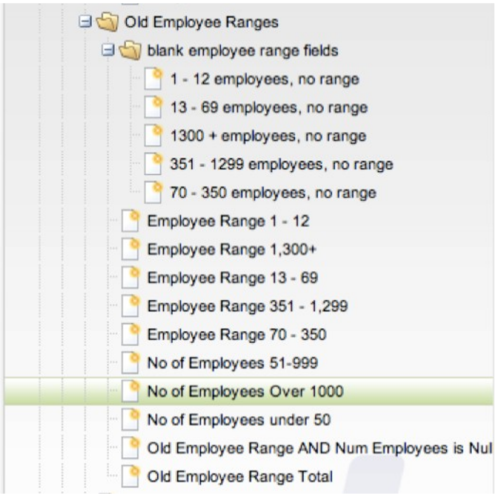
Old Value	New Value
1 – 12	1 – 50
13 - 69	51 – 999
70 – 350	51 – 999
351 – 1299	51 – 999
1300+	1,000+

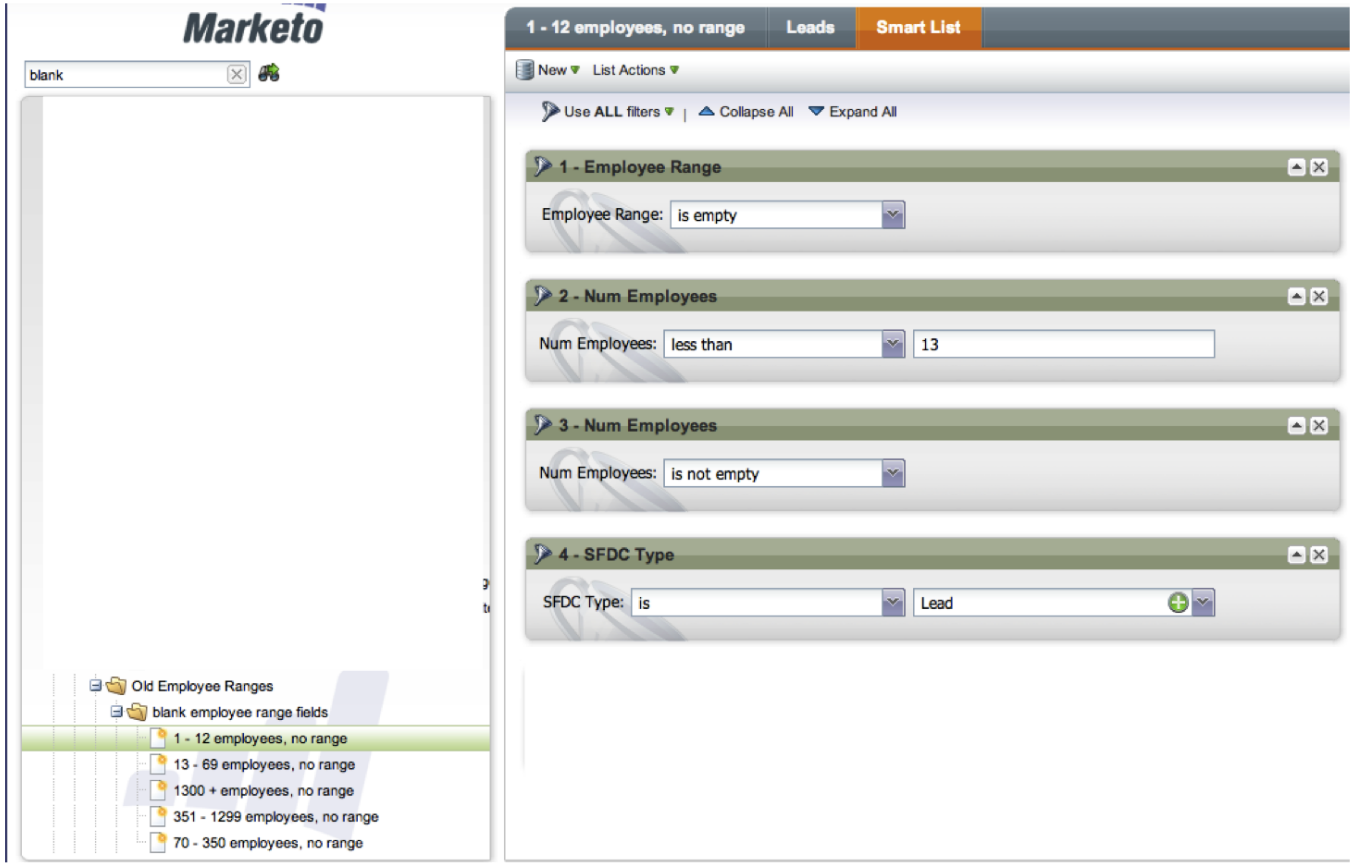
Since the ranges do not match up, you will have to make a decision to set the new value of Employee Range as close as possible. In this example, I chose the lowest range. Thus, `13-69` becomes `1-50` and `351-1299` becomes `51-999`.

If you also have a separate field for Number of Employees with an actual staff count, you can set leads who have this value to the correct Employee Range more easily.

Step 1: Smart List Setup

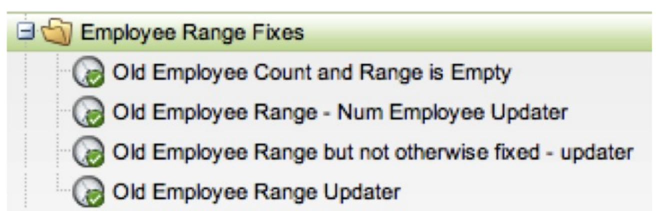
You will need several smart lists to help drive 3 or 4 campaigns to catch all the possibilities.





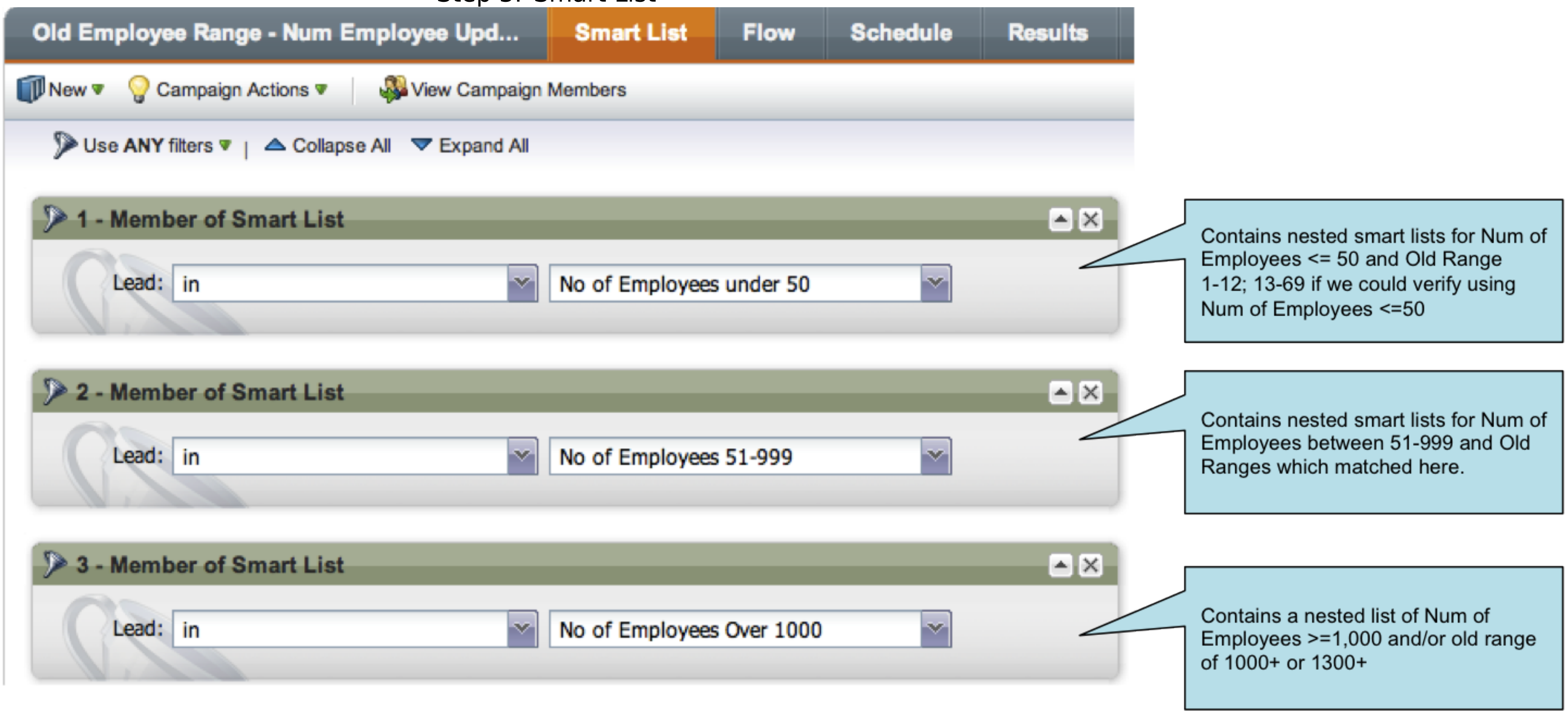
Step 2: Create a Campaign Called "Employee Count Changer"

Place this under the `Data Management` folder.



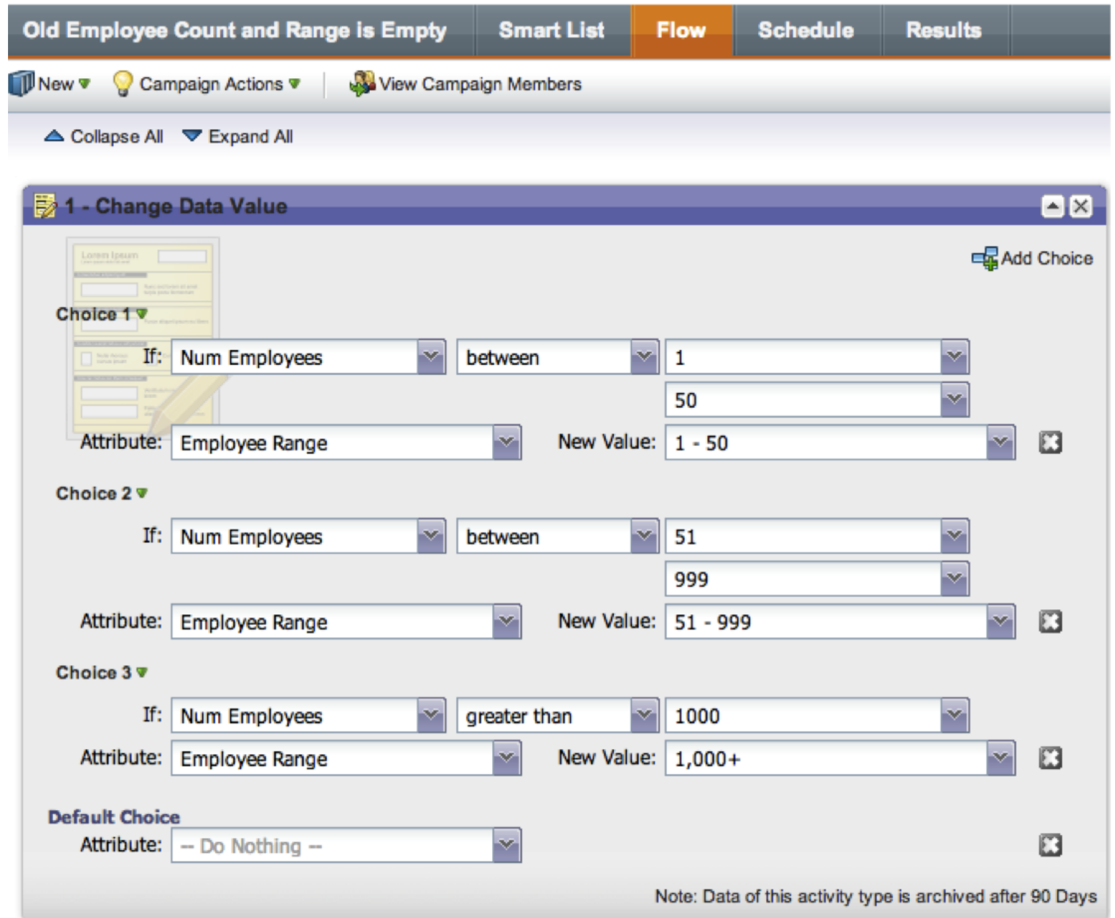
You will also need additional campaigns if you have multiple employee fields and need to adjust the new `Employee Range` properly.

Step 3: Smart List



Step 4: Flow

To take the `Num Employees` field as a basis for the `Employee Range`, run this `Change Data Value` flow.



Step 5: Schedule

I usually schedule these as Batch Campaigns to run at 1AM because the initial run will be thousands of records while future runs will include very few leads because we changed the picklist values on the Forms.

Lead Source Standardizer or Changer

Another common need is to correct or standardize Lead Sources because this field drives much of your reporting. Errors can creep in from a poorly maintained SFDC picklist or poorly supervised Marketo Forms. You may also need to regroup Sources as marketing techniques change.

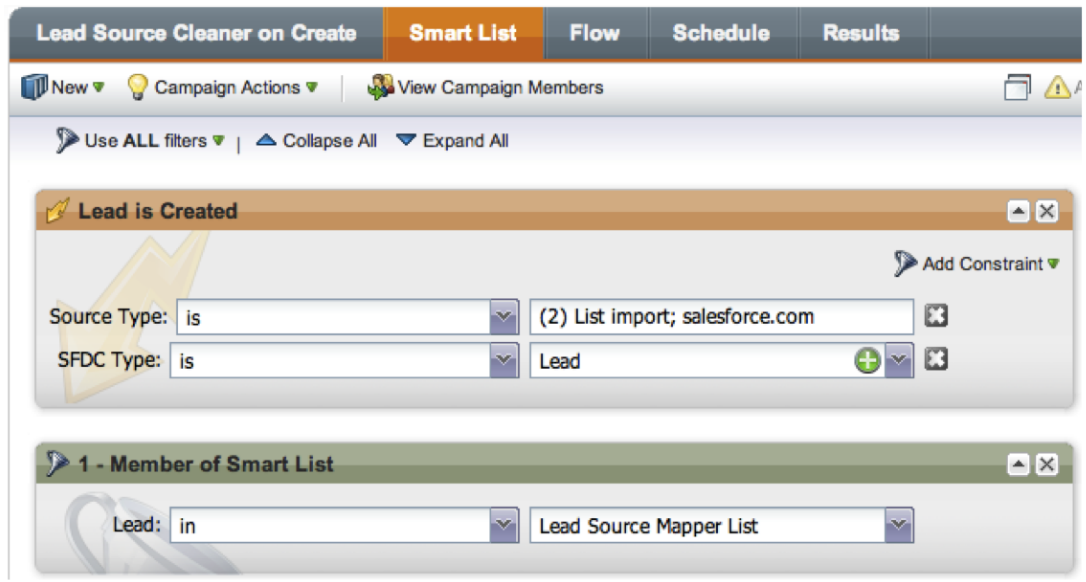
To mass update Lead Source values correctly requires building a careful mapping from the Old Value to the New Value. Your SFDC Admin can usually do this migration for you, but what if you don't have access to one? That's where Marketo comes to the rescue.

Step 1: Create a New Campaign Called "Lead Source Standardizer"

You would place this in a folder called `Data Management` or `Standardizers`.

Step 2: Smart List

Again, you could run this as a Trigger or a Batch Campaign. In this case, we want to correct errors immediately.

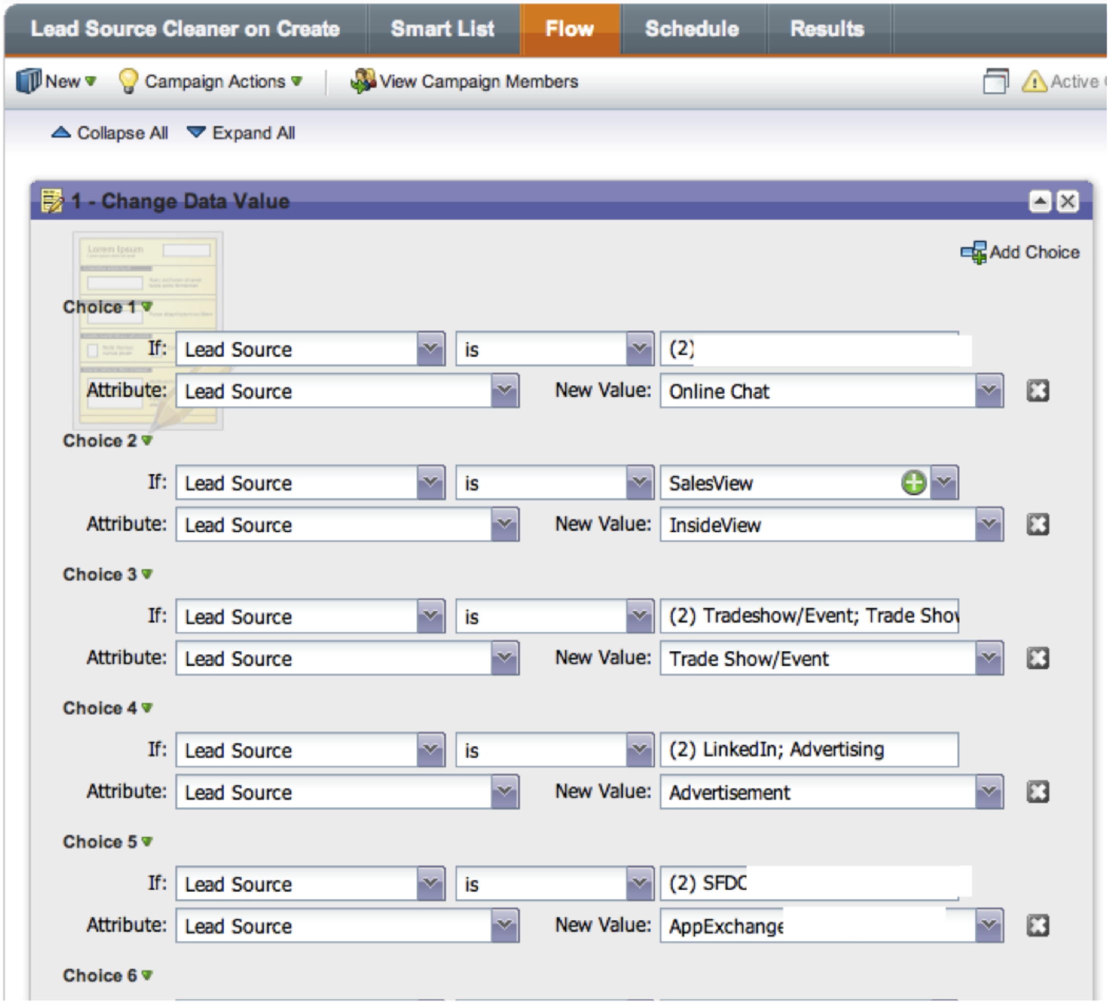


Any time a `Lead is Created` from a `List Import` or from Salesforce (where our errors occur), Marketo will see if that Lead's `Lead Source` matches common errors in the `Lead Source Mapper List`.

Step 3: Flow

In this example, we know common Lead Source value errors, so I made a few `Choice` steps to match and then `Change Data Value` to the proper `Lead Source`.

Your `Default Choice` should always be `Do Nothing` otherwise you risk overwriting data incorrectly



Step 4: Schedule

`Qualification Rule: One Time`

`Schedule: Active`

Other Updating Techniques

Using Import List to Update/Overwrite

One drawback of an automatic mass update to US State or Country codes is the sheer volume of Choices which make Marketo slow down. I usually recommend setting up a Country or State Standardizer for specific groups of misspellings *only after you've fixed 98% of the problem.* The fastest way to update all erroneous records in Marketo is to upload a list to overwrite the existing data.

In many CRMs, just as in Marketo, you can update or replace data if you have the unique record identifier and one or more fields to change. In Marketo, the unique identifier is Email Address.

Step 1: Check if Desired Field(s) are Field Blocked for Imports

If so, check with your Admin about exceptions. If the field is not blocked, then it can be overwritten using this method.

Step 2: Create a List or Smart List to Pull the Right Leads

Step 3: Export Leads with Desired Fields

Use the XLS button at the bottom. Try to only export the minimum number of fields using the Views button.

Step 4: Open the Spreadsheet

Open the spreadsheet, then remove any extraneous columns you do not plan to update.

Step 5: Use the Filter Tool to Select and then Modify Values

Be sure to avoid changing `Email Address`.

For instance, if you were migrating a newsletter list from another system, you could update the `Unsubscribe` values to reflect the newer preferences. Unsubscribe is a `True/False` field so set `T=1 or F=0`. (either is fine) Other fields like Country will require the appropriate value.

Step 6: Delete Unneeded Fields

Remove fields you do not plan to update, if you did not already.

Step 7: Save the File as CSV

Step 8: Import List as Normal

Doing this will *overwrite* any fields you left in the CSV import file. It will not change any other fields on existing records if you did not import those fields.

Step 9: Verify Results with the Static List or a Smart List

Using Salesforce to Update Records

A few times I pointed out that Salesforce could also perform some of these data adjustments for you. Usually this is easier if your SFDC Admin has access to list import tools such as Demand Tools. You can also try the following techniques if you are feeling bold:

- **List Import using the SFDC Import Wizard**: it is best to export an original list with the `Contact/LeadID` code, the Email Address, and the field(s) you want to change. You can then re-import that list with the adjusted field values. This will work unless field blocking was set for that field (or if you don't have permission). You can export this list using Marketo too.
- **Demand Tools**: have your SFDC Admin help.
- **Mass Backend Update**: again, your SFDC Admin can help here.

List Management Techniques

Early on in Marketo training they recommend creating various standing lists, such as `All Clients, EMEA Clients, Prospects, Unsubscribed`, etc. You can also create corresponding Static Lists for each group in addition to using Static Lists as import tools. And then there are Segmentations, which are much faster and more versatile as personalization tools. Here we will go through some of the common techniques for using each type of list.

Standing Smart Lists

Standing Smart Lists are your all purpose tool for making things happen in Marketo. I often say Smart Lists "drive" many automatic campaigns because of their dynamic nature. Smart Lists are simply database query instructions which are always active. Because they are dynamic, that is they tell you the count of Leads who *currently* match the criteria, they are always shifting their membership. Smart Lists can be used in many ways:

- Lead count.
- Quick reporting.
- Constraint Reports.
- Add a Custom Column to a report.
- Drive scheduled Batch or Trigger campaigns such as scoring or nurture.
- Drive Leads to Static Lists

Let's take a look at how to do each one.

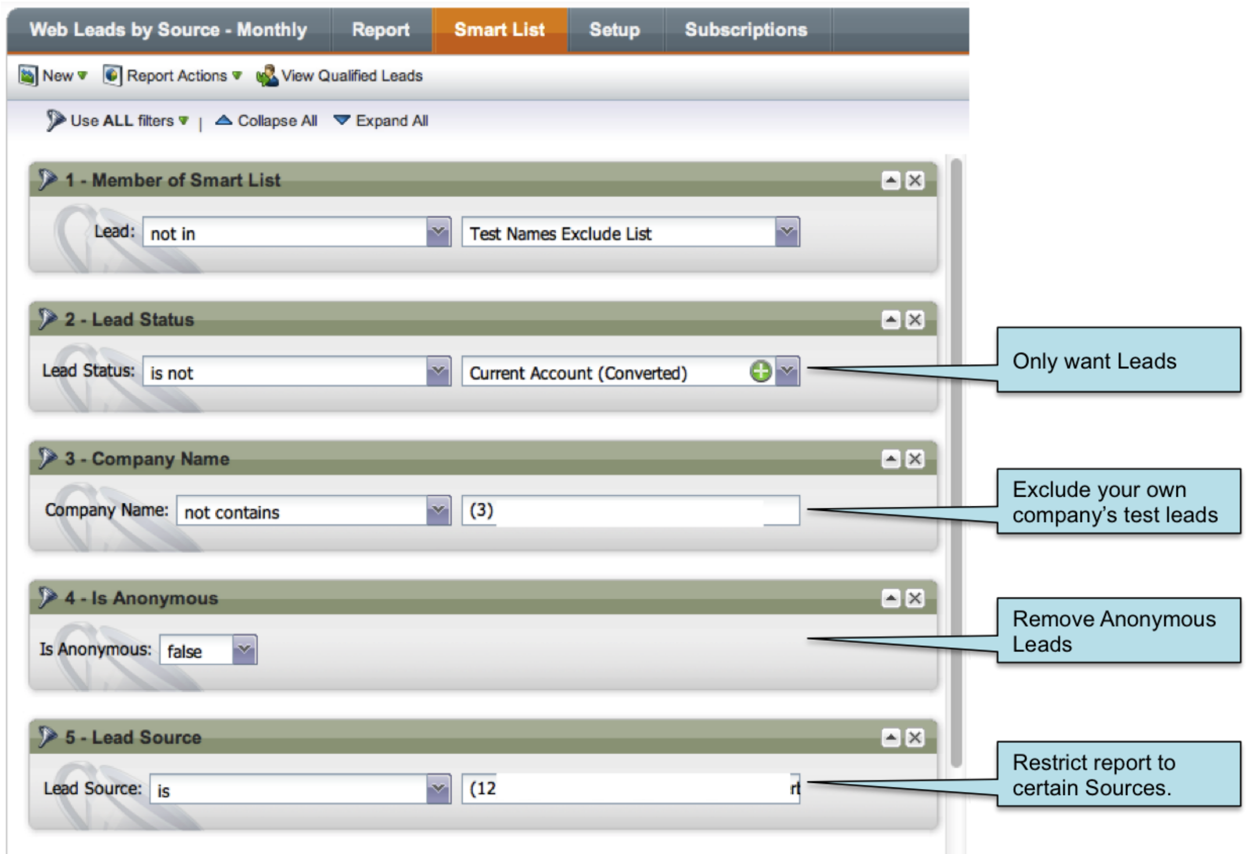
Lead Counts and Quick Reports with Smart Lists and Lists

To satisfy your reporting needs, use a Smart List to gather the data you need. The myriad filters can pull numberless combination of things from a simple "How many leads are in the Database?" to "Who filled out Page A on December 31, 2012?"

Here are a few examples:

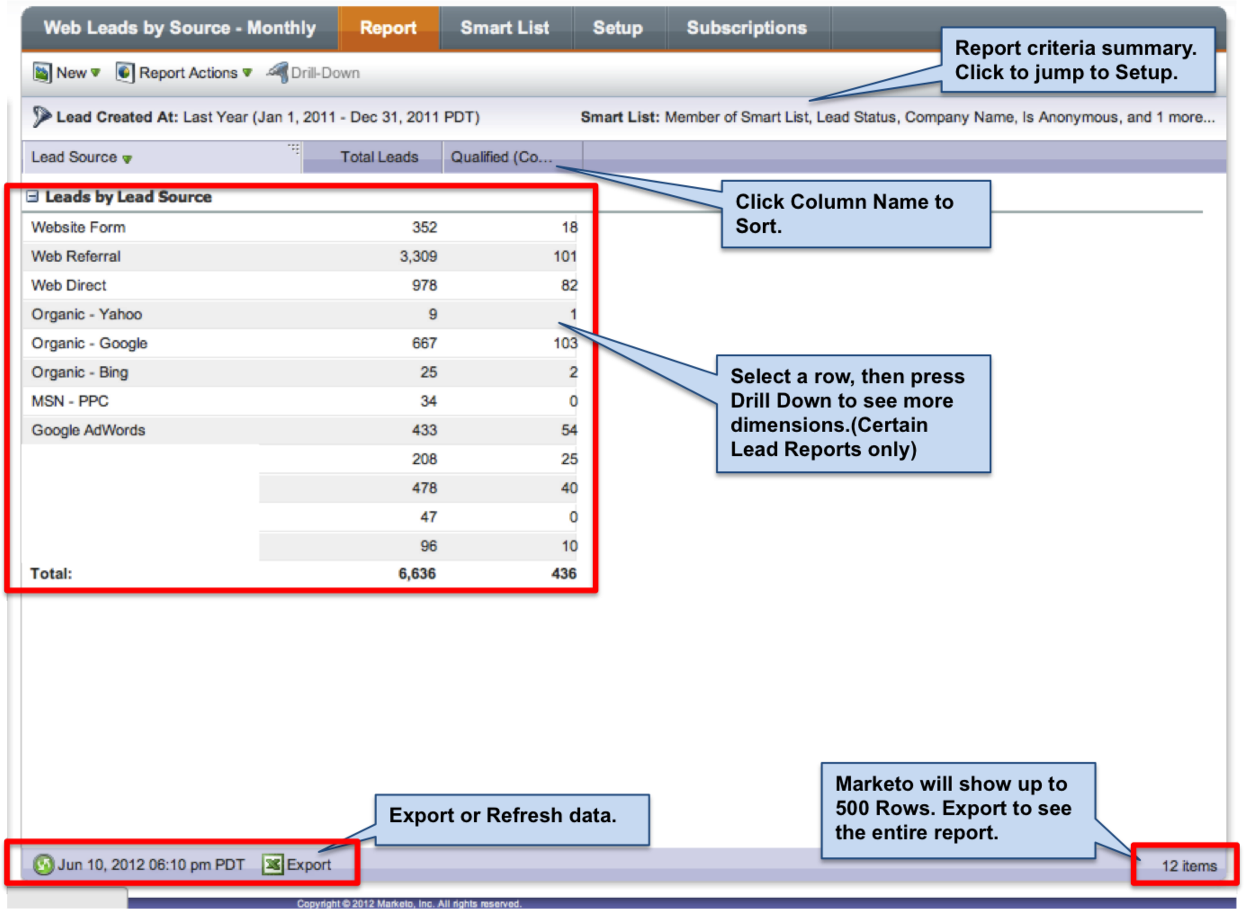
Constrain a Report with a Smart List

Smart Lists can be used inside Leads by Reports to focus the report on a particular group of leads.



Custom Columns and Smart Lists

Smart Lists can also be used as Custom Columns in Leads By Reports to show a specific sub-set of Leads who meet both the Report criteria and the Smart List criteria. It's like a cross tab. In this example, of 352 Website Form Leads, only 18 were Qualified.



Static Lists

Static Lists are best known as the way you import leads. They can also act in a variety of ways to help you manage your database:

- **Faster Lead Count and Reports**. In the last section, we saw how Smart Lists and Smart Campaigns can auto-populate Lists for faster counts and processing.
- **Error Check Imported Lists**. It is a good idea to keep Static Lists you use for import and that each import has its own list. This way you can identify groups of leads easily in case of an error.

- **Drive Nurturing Campaigns**. Lists are commonly used to manage nurturing and traffic cop programs because they can be temporary holding pens for leads. We'll talk more about this in the Nurturing Chapter.

Static List Populator

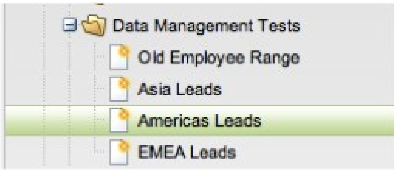
The Static List Populator is a great alternative to Segmentations because the list count is instant, allowing you to count leads as well as run campaigns much faster than relying on Smart Lists. To get this system working, you need to map out the lists you need regularly. Possible uses include:

- Regional list counts.
- Newsletter Subscribers, etc.
- Opt In/Out Management
- Product Interest Lists.
- More granular lists than Segmentations permits.
- You need more than 20 Segmentations or 100 Segments.

Step 1: Create the Needed Static Lists

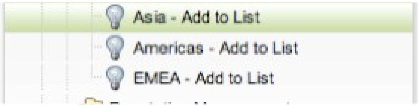
Step 2: Create the Required Smart Lists

You may already have these.



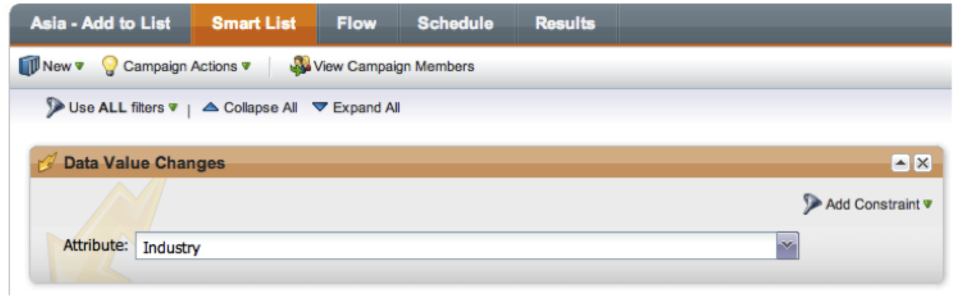
Step 3: Create corresponding Smart Campaigns.

Usually I prefer one campaign for each smart list. You could also collect them by Type, such as `Region – Add to List`. Make sure to name the campaign and list similarly.

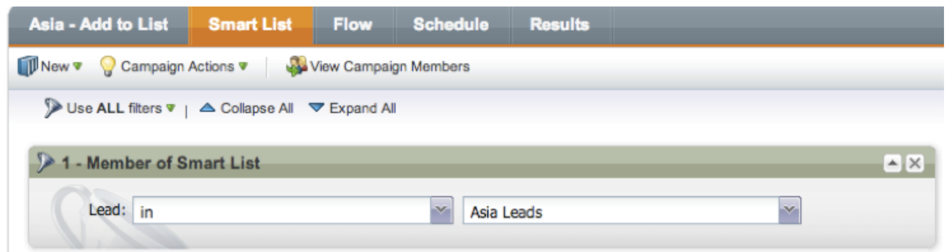


Step 4: Smart List

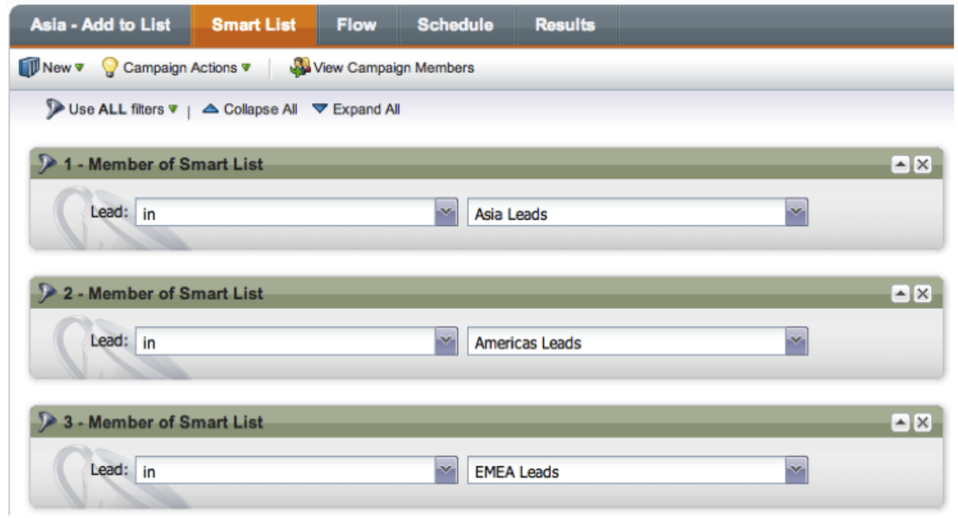
Trigger Version: use Data Value Changes to place an Industry Lead into the right list.



Batch Version: use `Member of Smart List` each night to `Add to List`.

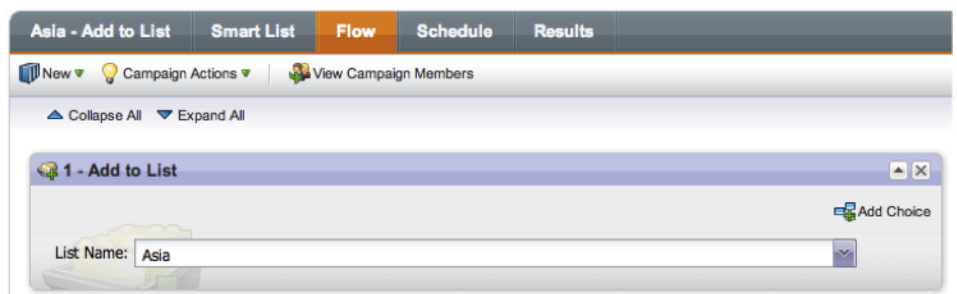


or for multiple lists at once:

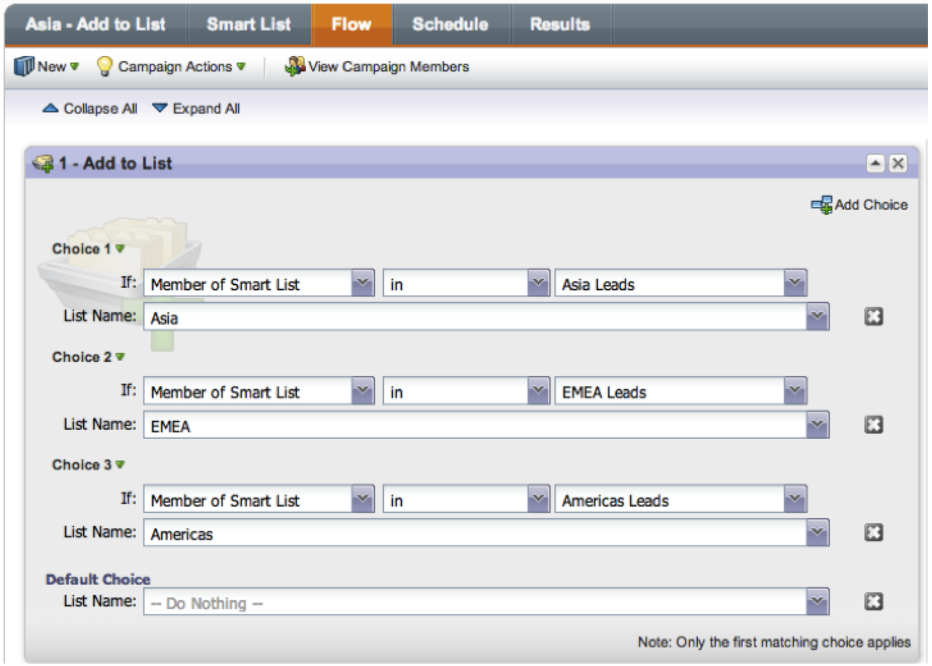


Step 5: Flow

`Add to List` will do nicely.

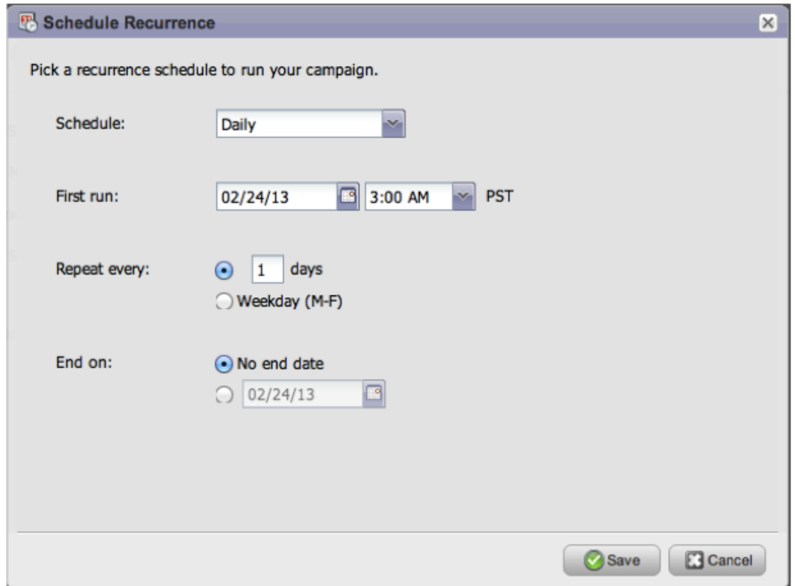


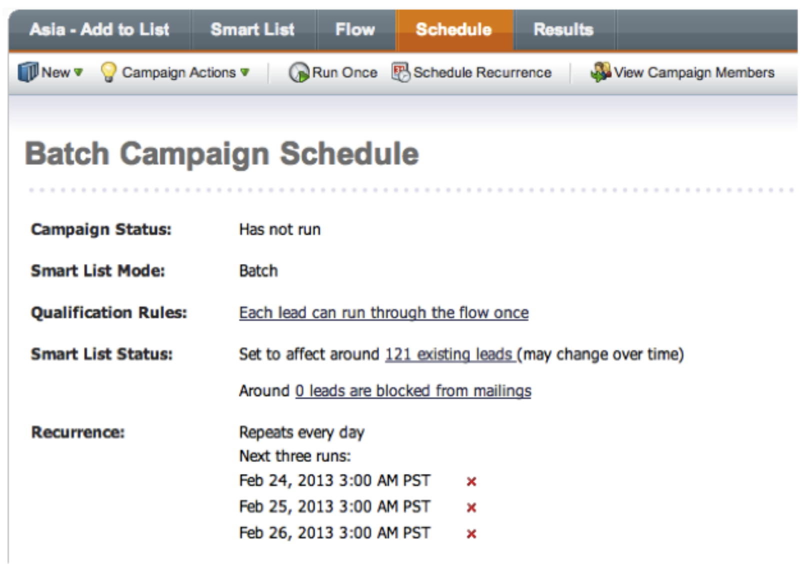
or for multiple lists:



Step 6: Schedule

Again, these are best as Batch campaigns. An alternative is to run a Trigger based on a field change.


Schedule Recurrence
Pick a recurrence schedule to run your campaign.
Schedule:
Daily
First run:
02/24/13
3:00 AM
PST
Repeat every:
1
days
Weekday (M-F)
End on:
No end date
02/24/13
Save
Cancel


Asia - Add to List
Smart List
Flow
Schedule
Results
New
Campaign Actions
Run Once
Schedule Recurrence
View Campaign Members
Batch Campaign Schedule
Campaign Status:
Has not run
Smart List Mode:
Batch
Qualification Rules:
Each lead can run through the flow once
Smart List Status:
Set to affect around 121 existing leads (may change over time)
Around 0 leads are blocked from mailings
Recurrence:
Repeats every day
Next three runs:
Feb 24, 2013 3:00 AM PST
Feb 25, 2013 3:00 AM PST
Feb 26, 2013 3:00 AM PST

Segmentations and Segments

Best Practice: use Segmentations for major database divisions like Region, Product Interest, or Function. Use other Lists for more granular divisions.

Segmentations are special database tools which allow you to rapidly define groups of your database for various purposes, including Dynamic Content. You must use Segmentations to take advantage of the Dynamic Content features of Marketo. Essentially, a Segmentation is a high level category of your database, broken down into Segments which are the sub-categories. Marketo says *“A Segmentation in Marketo refers to your target audience…Segments that define unique groups with that target audience.”* This should help:

- **Segmentation**: Industry
- **Segment**: Aerospace
- **Segmentation**: Region
- **Segment**: Americas
- **Segmentation**: Function
- **Segment**: Default (or “other”)

Warning: You are limited to 20 Segmentation each with 100 Segments each, across all Workspaces.

Segmentations apply to all Leads. A Segment will apply to only some Leads based on the criteria chosen. If a Lead does not match a Segment, it is placed in the Default Segment for that Segmentation.

Since Segmentations apply to all Leads, whenever a Lead qualifies for a Segmentation’s Segment, it will join it automatically.

Why use Segmentations instead of Smart Lists? Segmentations are much faster than Smart List counts. Even with a Cached Smart List, a Segmentation is much faster. It’s more like a dynamic Static List. You can also check Segment changes or use in Flows more rapidly. And finally, Segmentations enable Dynamic Content generation, which speeds up your ability to send out the right message at the right time to the right person.

Things to Know Before you Begin:

Warning: a Lead can only belong to 1 Segment: the first Segment it qualifies for or the Default Segment.

Limits: 20 Segmentations with 100 Segments each. That is 20 Segmentations *for all Workspaces*.

Rules: Segments use Smart Lists to create hard coded groupings for dynamic content. Choose these rules carefully because they define the Segment and the first time a Lead qualifies, it joins the Segment forever.

Priority Order Determines Segment Membership:

- Leads in the database belong to ALL Segmentations, but will only qualify for 1 segment in each Segmentation.

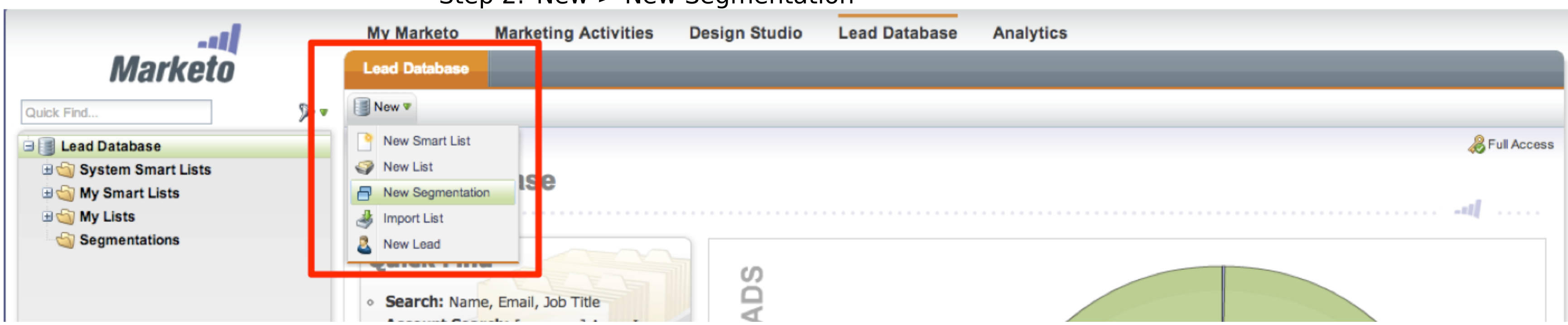
- The FIRST segment the lead qualifies for (based on priority order) is the one that it belongs to. The Lead can no longer join other segments.
- If it does not qualify, it joins the Default Segment.

Create a Segmentation

To [create a Segmentation](#), follow these steps. In this example I will create a Region Segmentation to group Leads by Americas, EMEA, and Asia.

Step 1: Go to the Lead Database

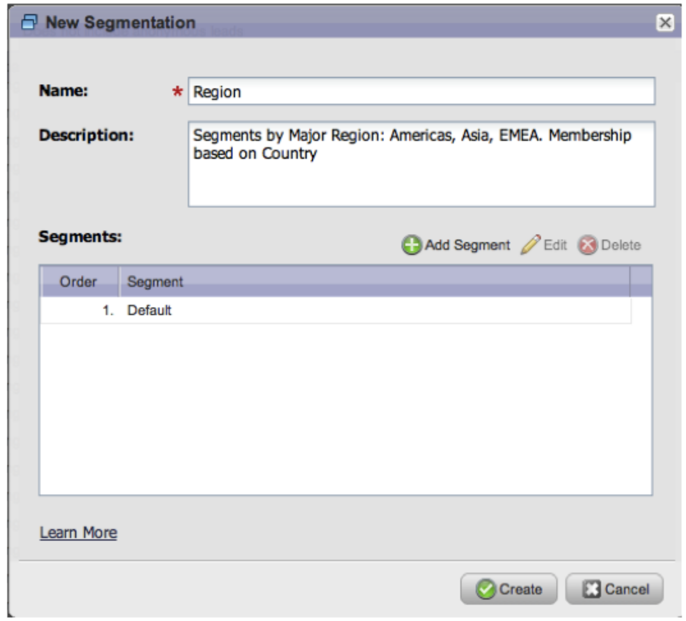
Step 2: New > New Segmentation

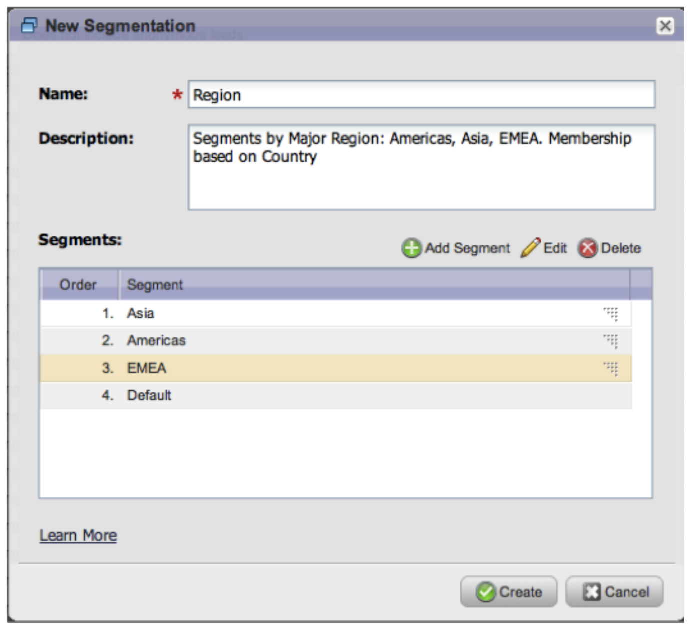


Step 3: Add Segments

Press Add Segment and name each segment as shown.

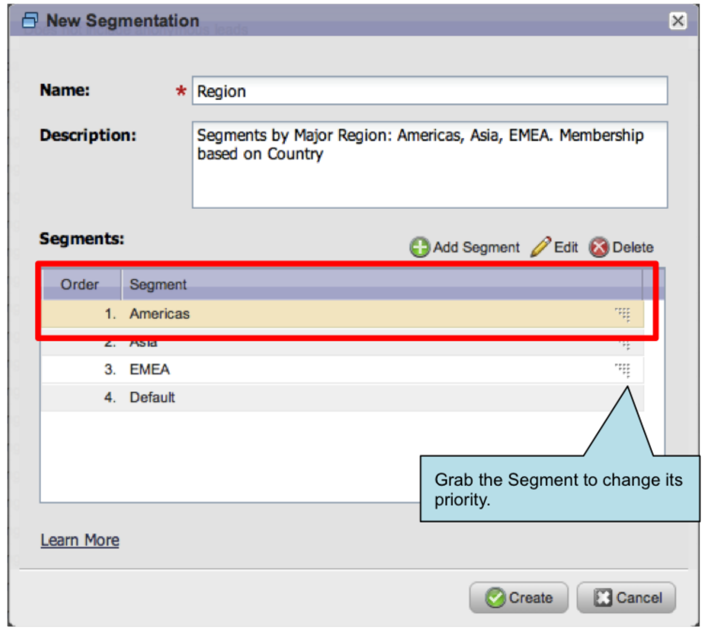
Note: Default Segment cannot be deleted.



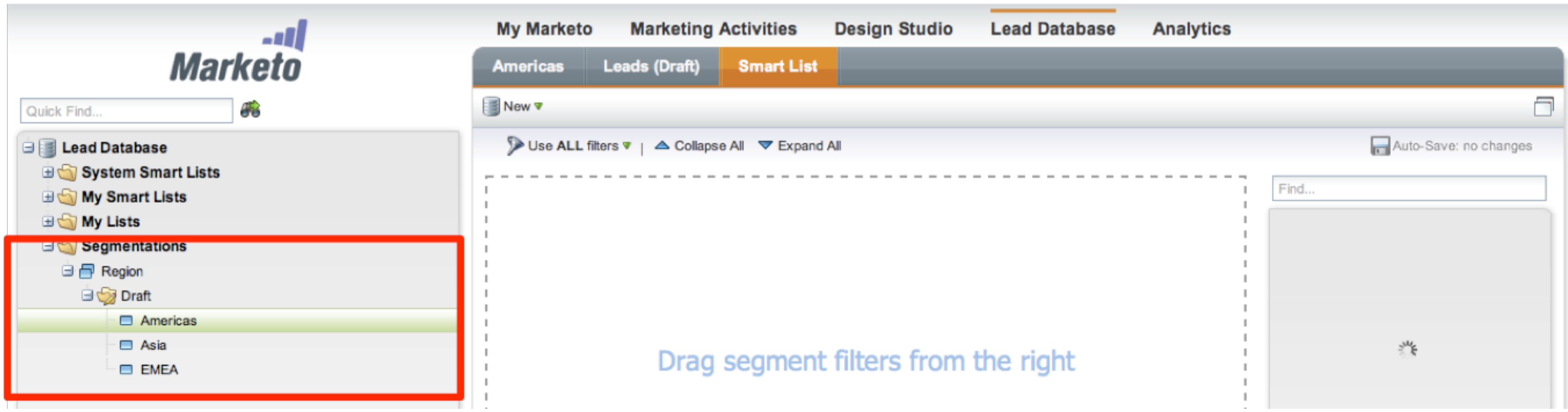


Step 4: Adjust Segment Priority Order

Make sure you have the priority correct. The Default Segment has the lowest priority at all times; it is the catchall. The Priority order is less important for geographic adjustments, however, for a Segmentation like Employee Ranges or Business Type, you might have to use a waterfall approach to ensure borderline Leads are in the preferred spot.



Step 5: Press Create.
Now the Segmentation is available to edit.



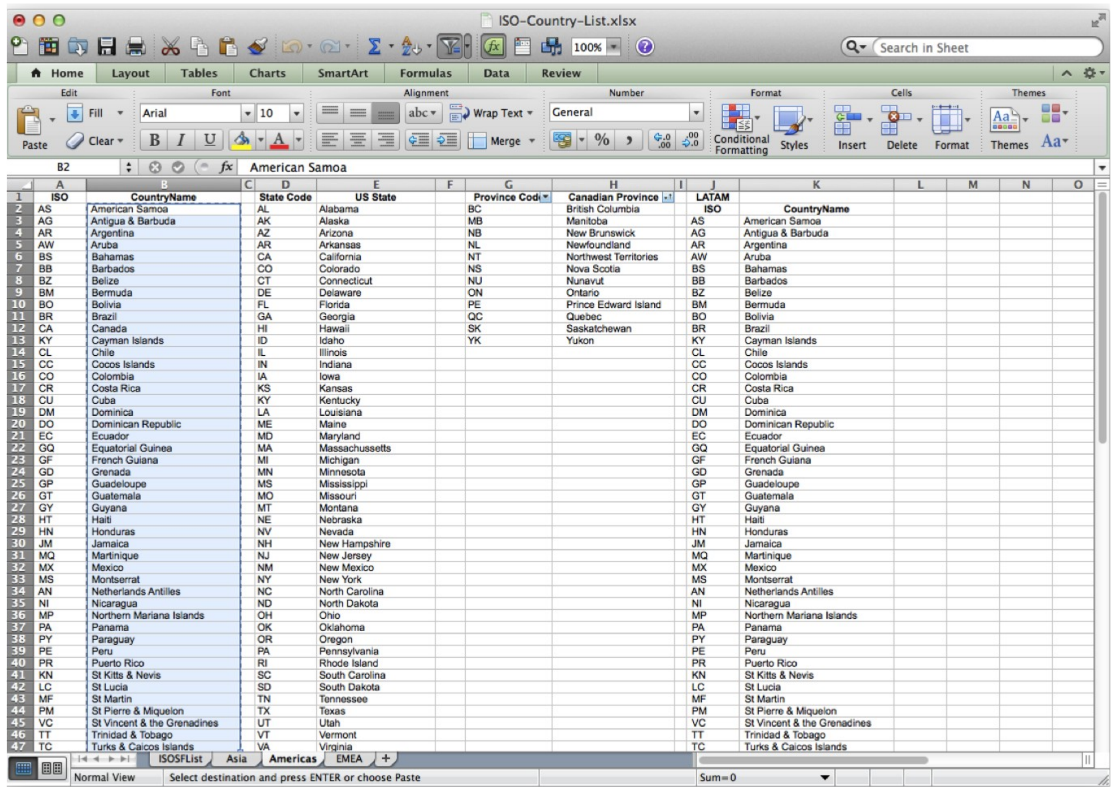
Step 6: Define Each Segment

Select the Segment, then use the familiar filters to define each Segment. For Americas, we will use the filter `Country`, then copy in the countries in the Americas. You can use my handy ISO Country List for a premade list of countries for Marketo.

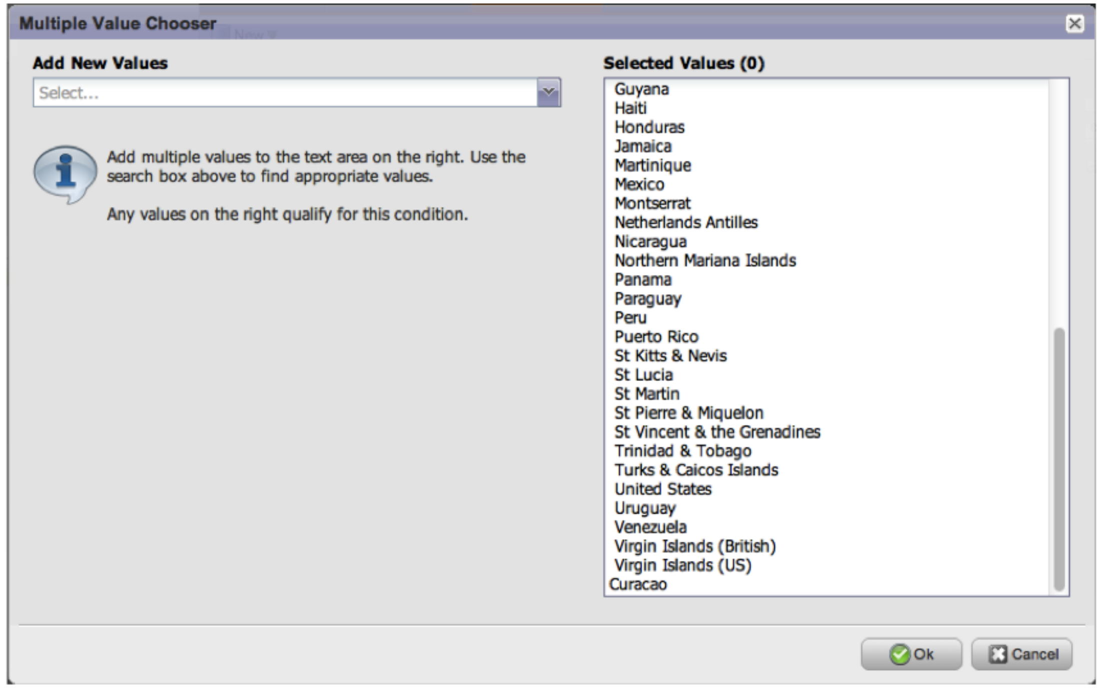
Each Segment looks very similar to a Smart List, except that it will become a permanent fixture of your database.

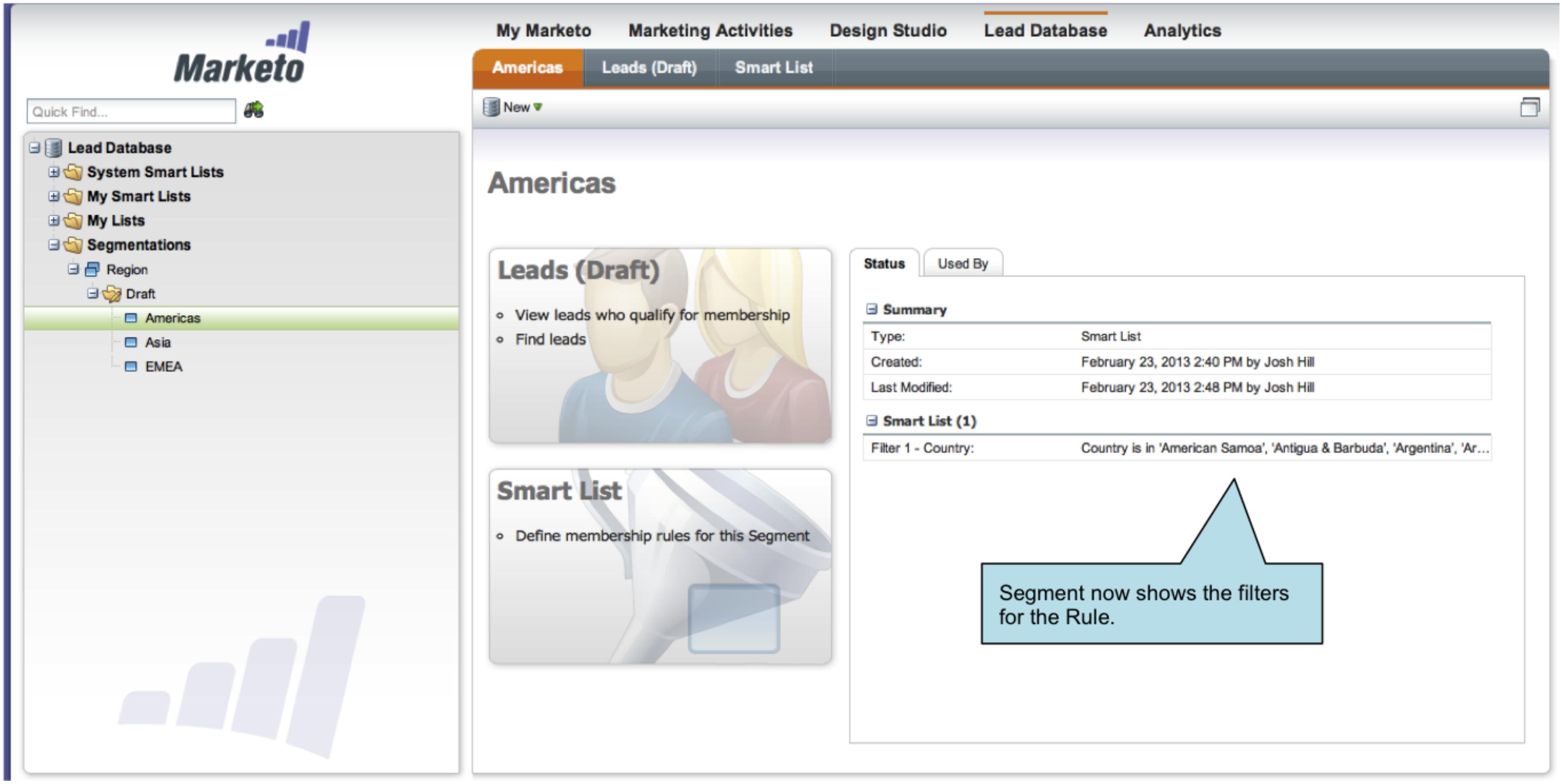
Americas Segment:

Copy a country list.

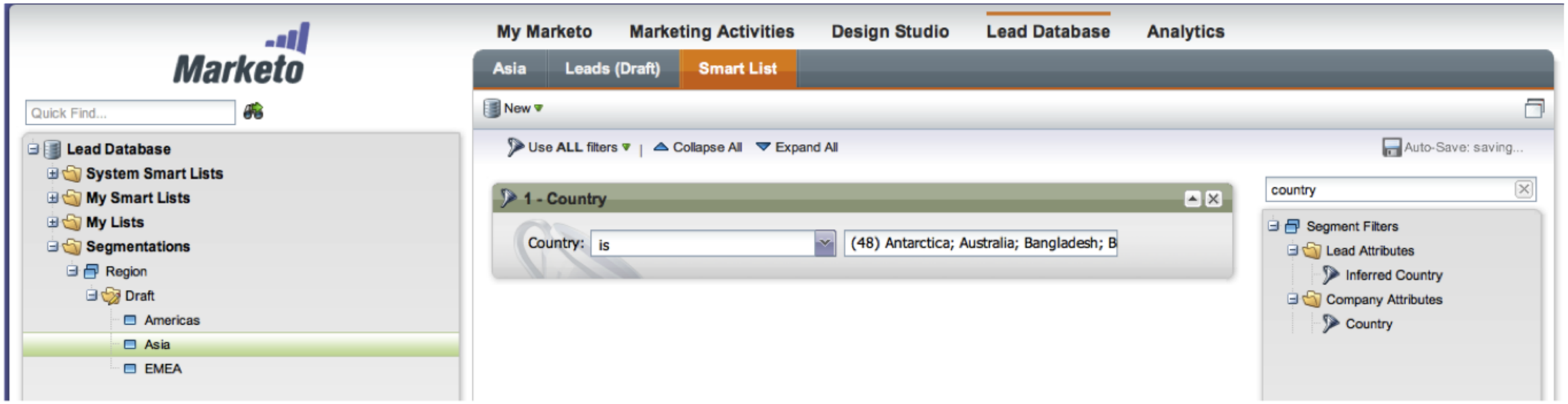


Paste it into the Country filter:

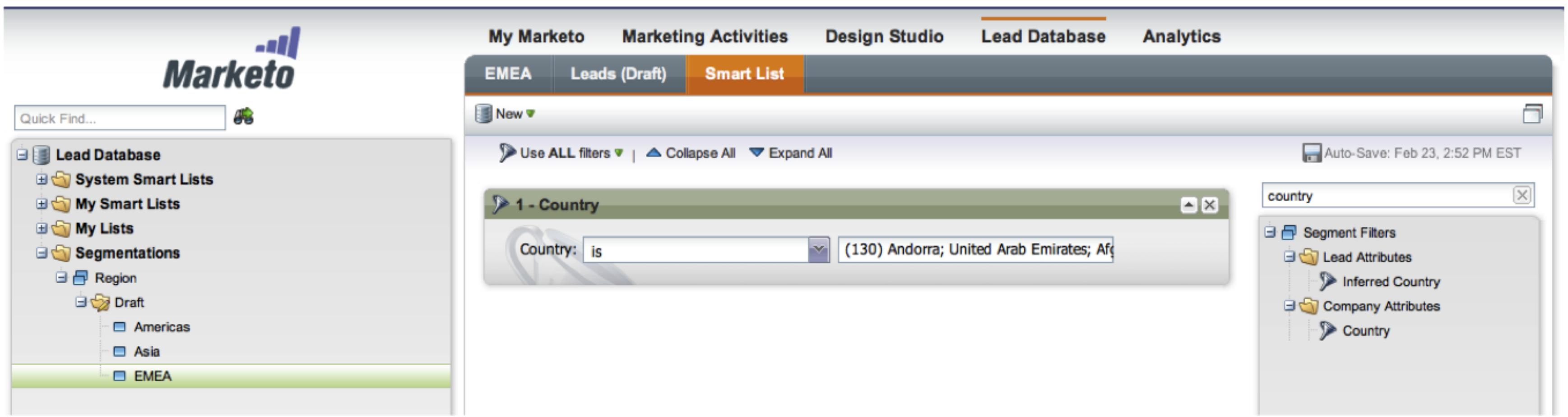




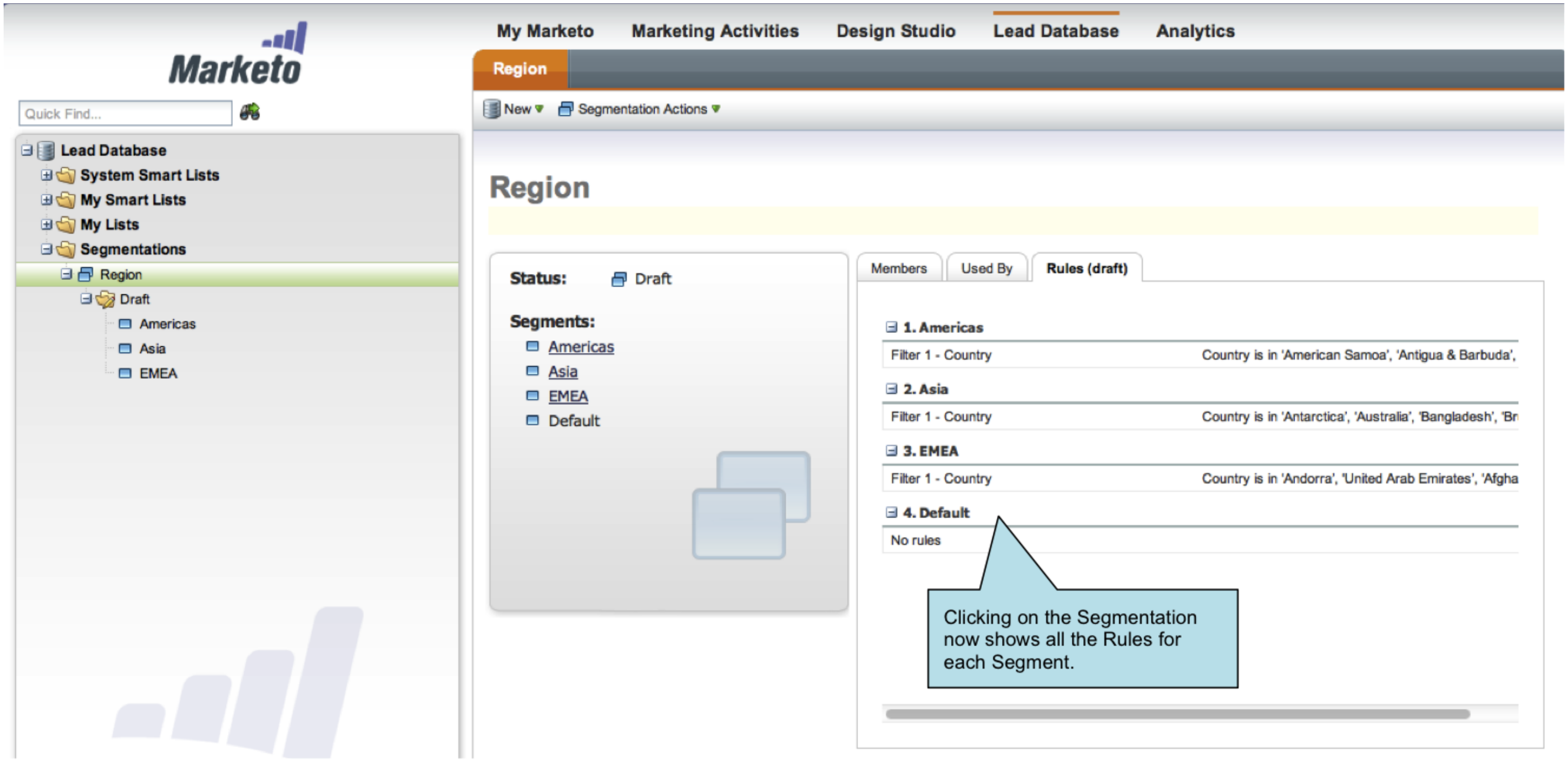
Asia Segment



EMEA Segment

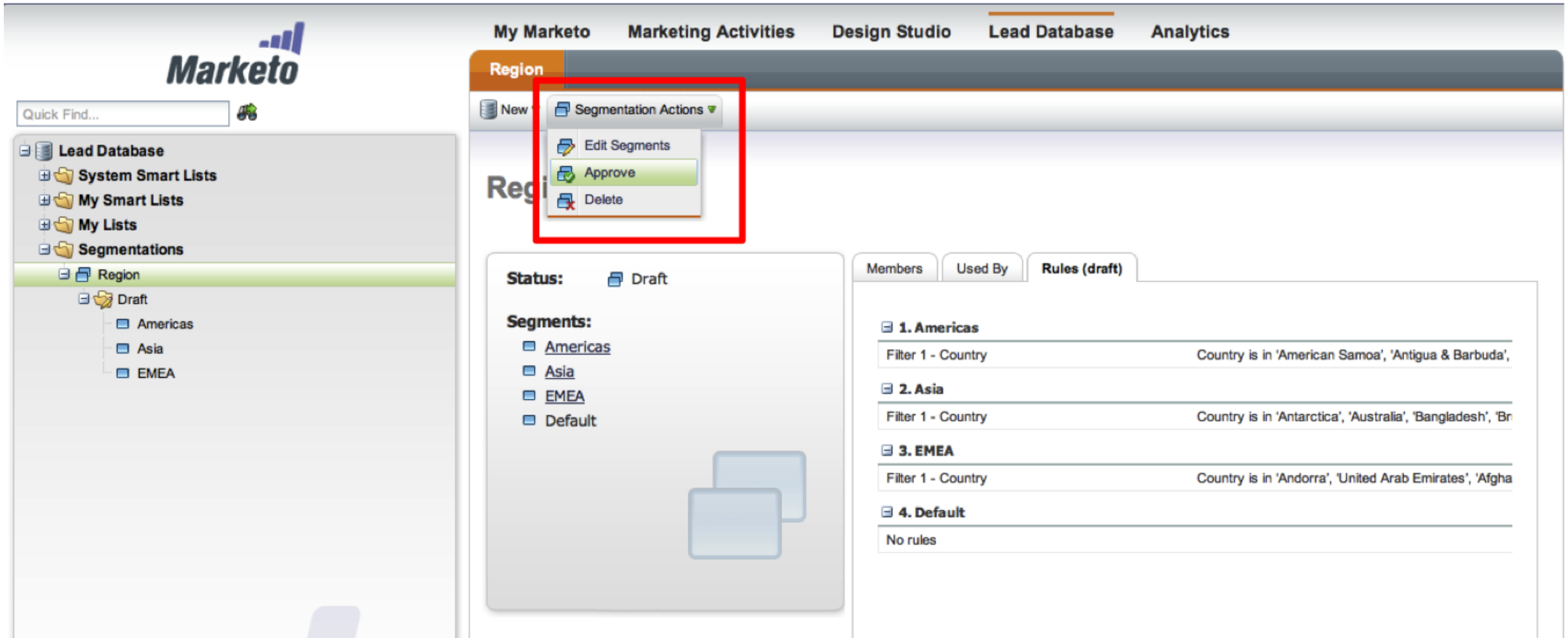


Now you see the Rules for each Segment in the Segmentation.


Marketo
My Marketo
Marketing Activities
Design Studio
Lead Database
Analytics
Region
Quick Find...
New
Segmentation Actions
Lead Database
System Smart Lists
My Smart Lists
My Lists
Segmentations
Region
Draft
Americas
Asia
EMEA
Region
Status: Draft
Segments:
Americas
Asia
EMEA
Default
Members
Used By
Rules (draft)
1. Americas
Filter 1 - Country
Country is in 'American Samoa', 'Antigua & Barbuda',
2. Asia
Filter 1 - Country
Country is in 'Antarctica', 'Australia', 'Bangladesh', 'Br
3. EMEA
Filter 1 - Country
Country is in 'Andorra', 'United Arab Emirates', 'Afgha
4. Default
No rules
Clicking on the Segmentation now shows all the Rules for each Segment.

Step 7: Approve the Segmentation

Once each Segment's Rules are defined, you can go to `Segmentation Actions > Approve` to make this available across the system.



Note: Approved Segments are Read Only. You can Rename a Segment.

Approval activates a process to move each Lead into one of the three Segments, or the Default Segment.

Edit a Segmentation

To Edit a Segmentation to Add or Delete Segments, you must create a Draft version, make changes to the Draft, and then re-approve the Segmentation.

Changing an existing Segmentation can have adverse effects on your active Programs or Campaigns. During the re-approval process, the content a Lead receives may vary from your intentions. Deleted Segment's content will also be deleted if you were using Dynamic Content.

You can edit the following components of a Segmentation in Draft Mode:

- Segments
- Segment Names
- Priority Order
- Segment Rules
- Add Segments
- Delete Segments

Remember to Re-approve your Segmentation when complete. Also remember to adjust campaign flows that rely on your Segmentation.

Warning: deleting a Segment will also permanently delete associated Dynamic Content from all assets.

Delete a Segmentation

You can delete a Segmentation. Deleting it does not affect the Leads inside, just like deleting a Static List has no effect on the actual Leads. To delete the Leads, you must do a few key checks:

1. Remove the Segmentation or Segments from any dynamic content. Check the Used By tab to find out which assets are using this Segmentation.
2. Unapprove the Segmentation.
3. Delete the Segmentation.

There is no going back, so be sure you want to do this!

Other Segmentation Tips

Using In Smart Lists or this article on Segmentation Filters and Triggers.

Sharing in Workspaces – it's better to use the Segmentation in the default Workspace.

Maximum of 25,000 Dynamic Content Variation per Asset: if you use too many variations in an asset, Marketo will show an error. Use the formula: (Number of Segments in Segmentation 1) x (Number of Segments in Segmentation 1) x … to see if you will hit this number.

Chapter Review

Self-Quiz

Why use Marketo to automatically adjust field values?

___

How can you stop values from being overwritten?

___

When will Marketo create a duplicate record?

___

___

Recommended Resources

Marketo Documentation

SFDC Lead is Deleted field

Removing Leads in Marketo that are SFDC Deleted

Deleting in Marketo, does not delete from SFDC and Marketo will sync back later, UNLESS the Marketo SFDC User cannot see certain leads.

Marketo Community

Tools

Chapter 13. Using the Data.com Enhancer

At a Glance

Overview

Data.com (or Jigsaw) can be a valuable addition to your quest for better contact details for your Sales team. Currently, Data.com is the only tool integrated with Marketo that can be used to automatically (or manually) update selected records. Of course, if Data.com cannot find or match the records in your database with those in its database, no updates will occur.

At best, the tool can help you fill in a few blanks for some records. Since even a 1% improvement in your ability to identify and contact prospects can lead to large dollar gains down the funnel, using the Data.com Enhancer can be a big help.

How you use the Enhancer depends on your database and lead flow. There are two main ways to use the flow action:

1. Enhance all leads (or selected leads) automatically.
2. Enhance selected leads and fields.

Warning: Data.com will update all fields it can unless field blocked.

Option 1 will update all records if it finds a match, overwriting any existing data if Data.com has that data. Option 2 allows you to select the leads and the fields to update, however, this method is more time consuming since it involves careful blocking and unblocking of fields to ensure only missing data is updated.

Data.com Setup

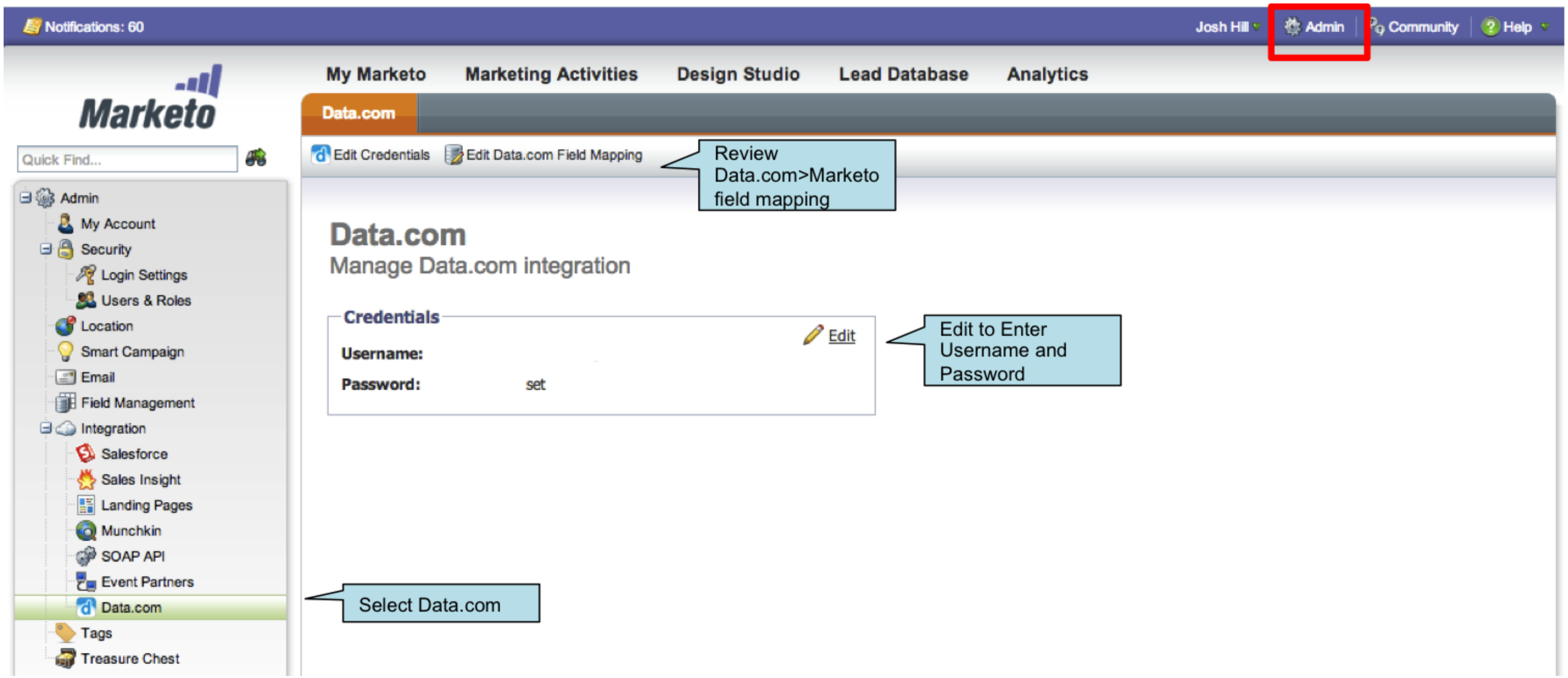
Note: A Jigsaw.com license is required, which is not the same as a Data.com/SFDC user seat.

You need a full Jigsaw.com login to use the Data.com Enhancer in Marketo. You cannot use a Data.com license that is already being used inside Salesforce, so an entirely separate licensed “seat” is required. To test this, try to login to Jigsaw.com. If you can, then you have the correct license. If you cannot, you must either sign up on Jigsaw, or contact your Salesforce/Data.com representative.

Once you have a Jigsaw.com username, you can do the following quick steps to integrate Marketo+Data.com.

Step 1: Admin>Integration>Data.com

If you are an Administrator, go to the Data.com manager.

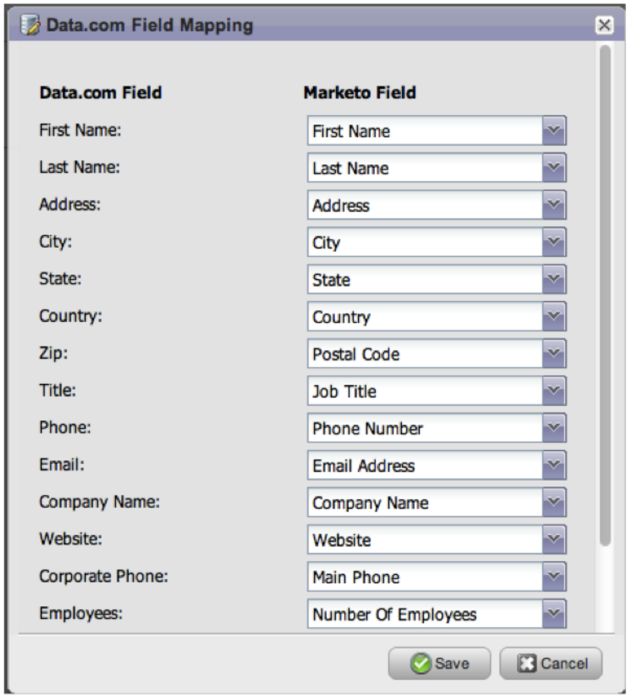


Step 2: Enter Login Credentials

This is your Jigsaw.com login.

Step 3: Review Default Field Mappings

Click `Edit Data.com Field Mapping` to review the mapped fields. In most cases you will not have to change anything, but check anyway. Remember Data.com is about Contact and Industry details, so it will not be able to update any custom information you may require.



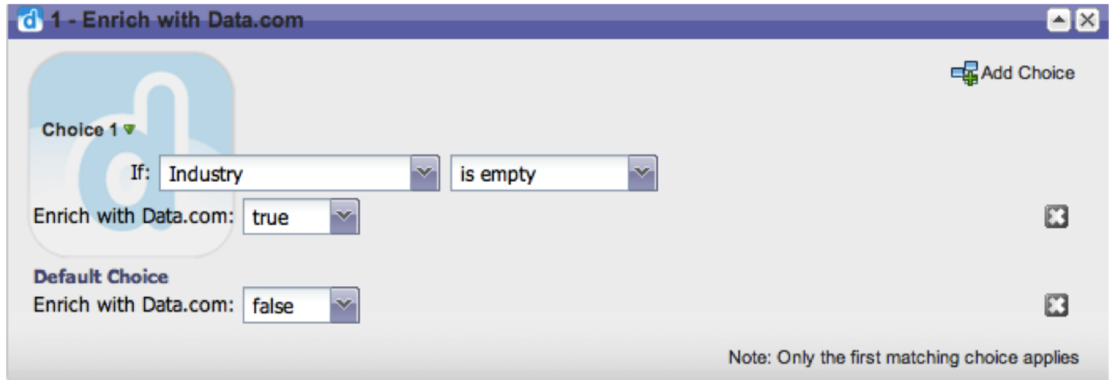
Step 4: Press Save

You can now use the Flow action `Enhance with Data.com`

A Note on the Enrich Flow Step

Generally you will use `Enrich with data.com` = `True`. You can, of course, `Enrich` during any flow if you want. You can also use `Add Choice` to trigger an enhancement based on conditions.

The problem with using `Add Choice` is the `Enrich` step will update the *entire Lead record* no matter what you intended. The following example illustrates this situation:



Regardless of the Smart List you used, Marketo will attempt to `Enrich` only if `Industry IS EMPTY` and will ignore the rest of the leads. The better way to handle this is to ensure your Smart List included leads where `Industry IS EMPTY`, then your Flow will have one action:

Perhaps Marketo will update this flow step to allow single field updates using Add Choice.

Automatic Enhancement

Warning: Do not import or update email addresses since you cannot send unsolicited email through Marketo (or anywhere).

A key benefit with this integration is to setup a campaign to fill in the blanks as you sleep. You must be very careful with this method; I recommend carefully selecting the criteria, timings, and field blocks to avoid updating your leads with incorrect information.

That being said, there are several scenarios where you may want to enhance your leads.\

- Enhance when capturing Blog Newsletter leads who provide you just an email address.
- Enhance when capturing other low info Forms (when not using Progressive forms).
- Enhance when Lead is Created in Salesforce.com (e.g.: sales team)
- Enhance during Webinar Registrations.
- Enhance when leads are missing data. (On create or batch)

Auto Enhance with Data.com in Any Campaign

Note: each lead updated costs 5 credits, or 1 import, so be sure you have enough.

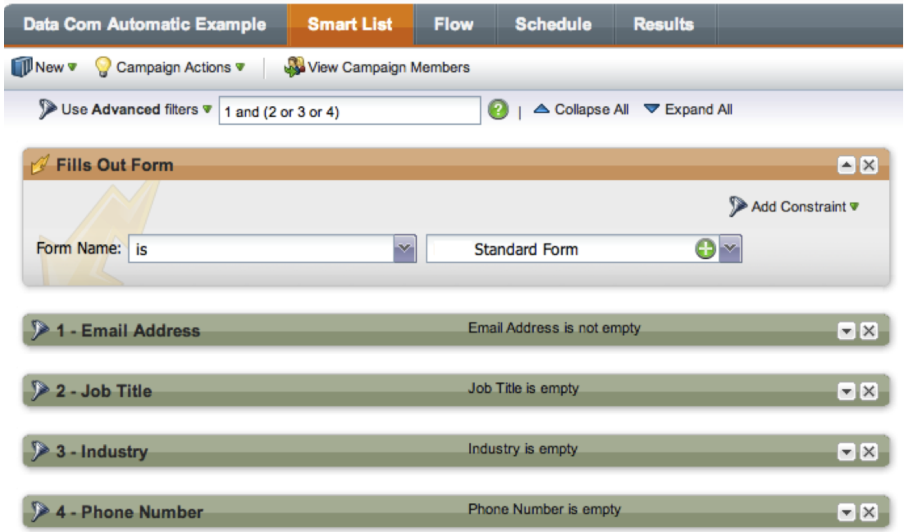
Automatic enhancement should be restricted to a specific set of circumstances, such as a Newsletter Sign Up where you know or can control the number of Data.com imports. You should monitor your credits on Jigsaw.com lest this campaign fail because of 0 credits.

Step 1: Create a Smart Campaign

Call it `Enrich on Form Fill Out`.

Step 2: Smart List Setup

In this example, use the trigger, `Fills Out Form`, then select fields that may be empty and your ISRs need. Here we want to make sure this campaign only activates on leads where `Email Address` exists and other fields are `Empty`.



Step 3: Flow Step: Enhance with Data.com = True

Step 4: Schedule:

Run Once.

Step 5: Activate

Batch Enhance Specific Leads

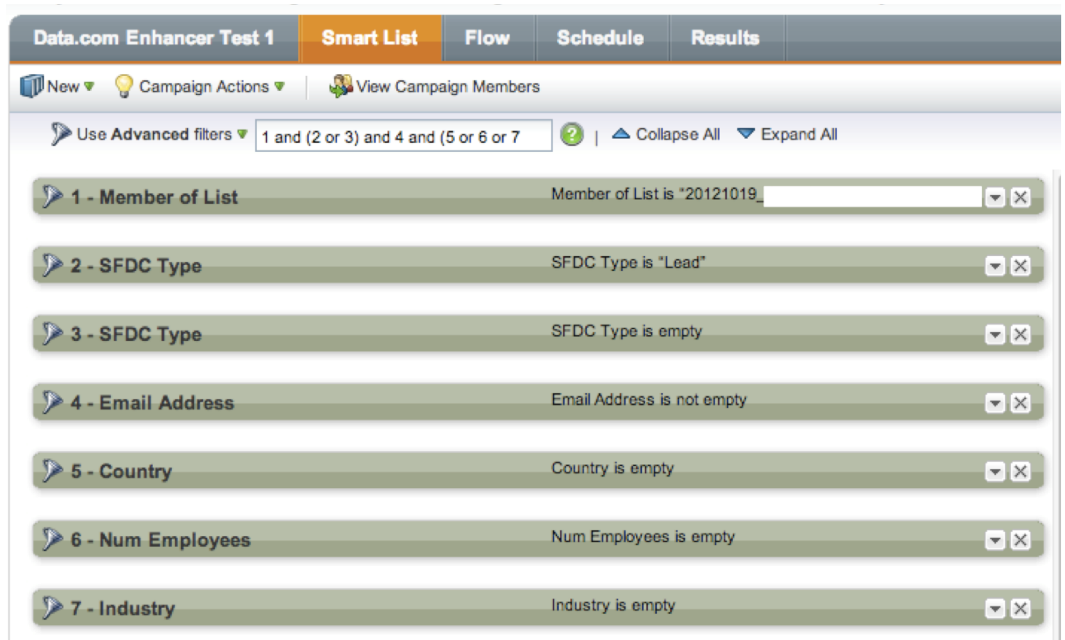
In this example, we will attempt to enhance a specific group of leads where `Industry IS EMPTY`. Other examples are here.

Step 1: Create a Smart Campaign

You could name this `Data.com Enrich Once a Day`.

Step 2: Smart List

The criteria here could be similar to the Automatic example or could trigger an update if a Lead were a Member of a List and also just a Salesforce Lead and had any missing data.



Step 3: Flow Step: Enrich with Data.com = True

Step 4: Schedule: Run Once

You could set the Qualification Rule to Every Time, however, this may cause inaccurate data over time if Sales has more recent data than Jigsaw, which is often the case.

Enhancing Selected Leads and Fields

Note: more often than not, Data.com won't match your records, enhancing few or none for each field.

Automatic enhancing of selected leads and fields is **not recommended** at this time because field blocking for Data.com updates will prevent any updates, even if the field is empty. To ensure data integrity, I recommend the following steps, which are best used to update specific groups, or lists, of Leads.

Your goal in this section is to update just **one** field at a time, ensuring that Data.com is prevented from overwriting data in existing fields.

Step 1: Create a Table like this one to track progress

As you run through these steps, first block, then unblock, enhance, then reblock each field.

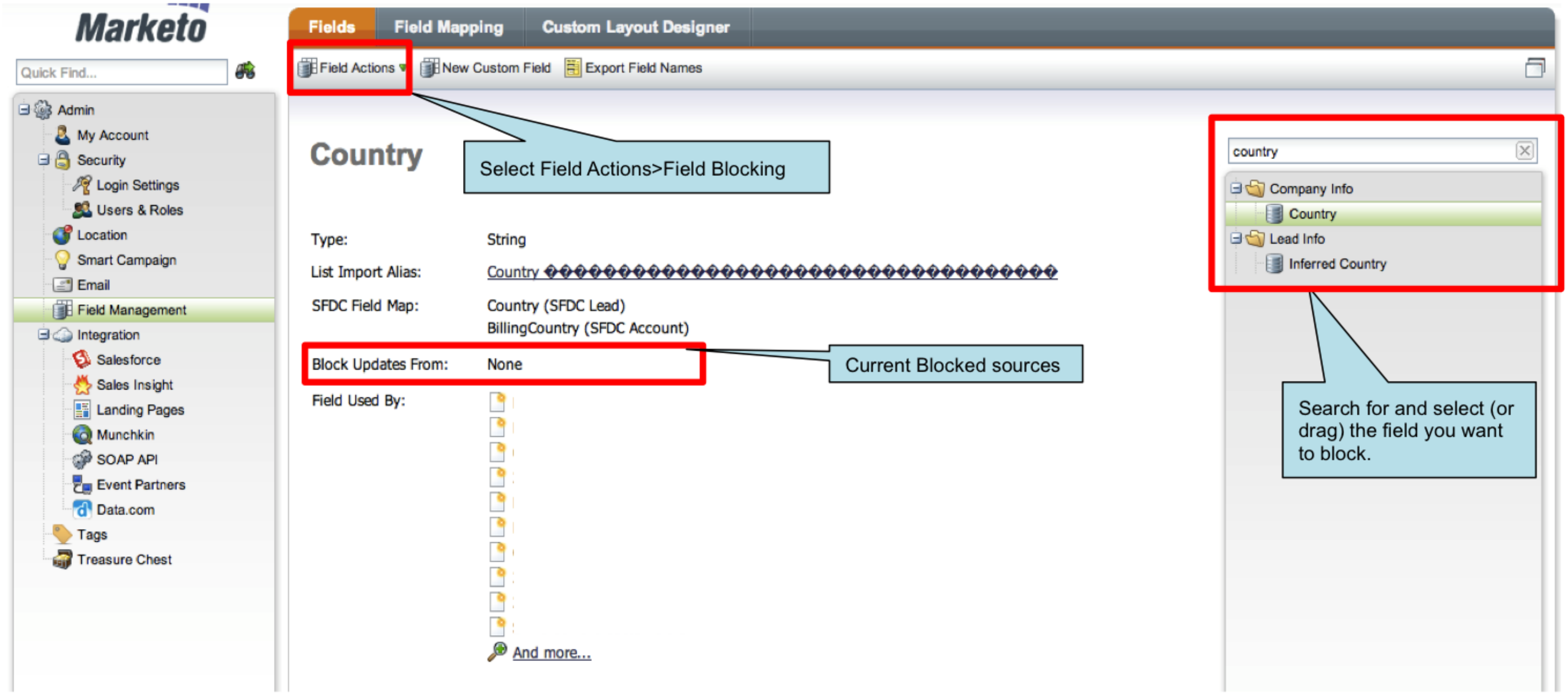
Field Name	Blocked	Unblocked	Enhanced	Reblocked
State	✔			
Job Title	✔	✔	✔	✔

Step 2: Field Block Data.com on all key fields

I usually field block the following list against accidental Data.com updates:

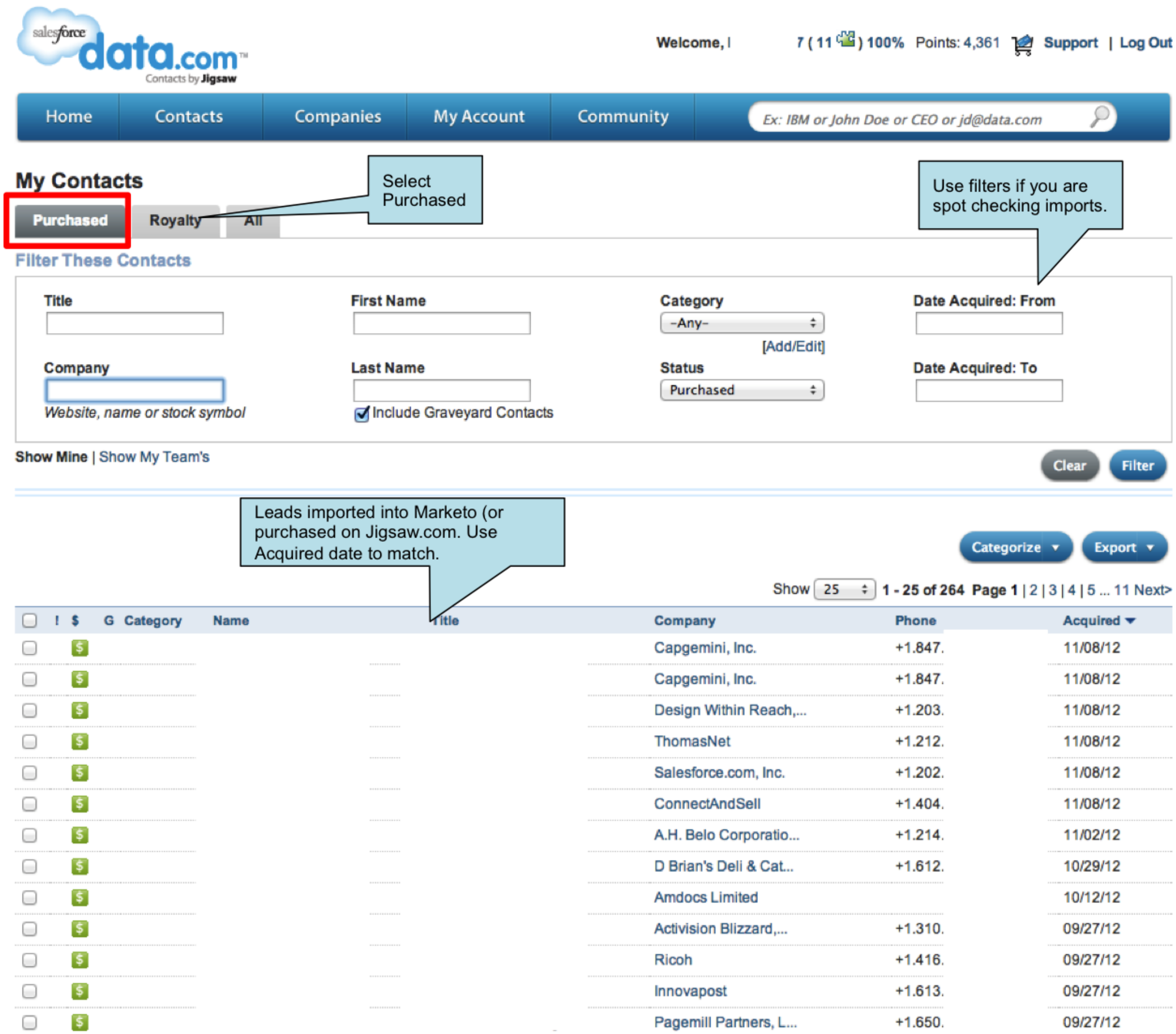
- Name
- Address
- Street
- City
- State
- Postal Code
- Country
- Job Title
- Industry
- Employee Count
- Annual Revenue
- Company (even though it shouldn't update)
- Lead Source (critical for existing leads).

To field block, you must be an Administrator.



Step 3: Login to Jigsaw.com

Step 4: In Jigsaw, Go to My Contacts > Purchased to monitor progress


salesforce data.com
Contacts by Jigsaw
Welcome, I
7 (11) 100% Points: 4,361
Support | Log Out
Home
Contacts
Companies
My Account
Community
Ex: IBM or John Doe or CEO or jd@data.com
My Contacts
Purchased
Royalty
All
Select Purchased
Use filters if you are spot checking imports.
Filter These Contacts
Title
First Name
Category
-Any-
[Add/Edit]
Date Acquired: From
Company
Website, name or stock symbol
Last Name
Include Graveyard Contacts
Status
Purchased
Date Acquired: To
Show Mine | Show My Team's
Clear
Filter
Leads imported into Marketo (or purchased on Jigsaw.com. Use Acquired date to match.
Categorize
Export
Show 25 1 - 25 of 264 Page 1 | 2 | 3 | 4 | 5 ... 11 Next>
! $ G Category Name Title Company Phone Acquired
Capgemini, Inc. +1.847. 11/08/12
Capgemini, Inc. +1.847. 11/08/12
Design Within Reach,... +1.203. 11/08/12
ThomasNet +1.212. 11/08/12
Salesforce.com, Inc. +1.202. 11/08/12
ConnectAndSell +1.404. 11/08/12
A.H. Belo Corporatio... +1.214. 11/02/12
D Brian's Deli & Cat... +1.612. 10/29/12
Amdocs Limited 10/12/12
Activision Blizzard,... +1.310. 09/27/12
Ricoh +1.416. 09/27/12
Innovapost +1.613. 09/27/12
Pagemill Partners, L... +1.650. 09/27/12

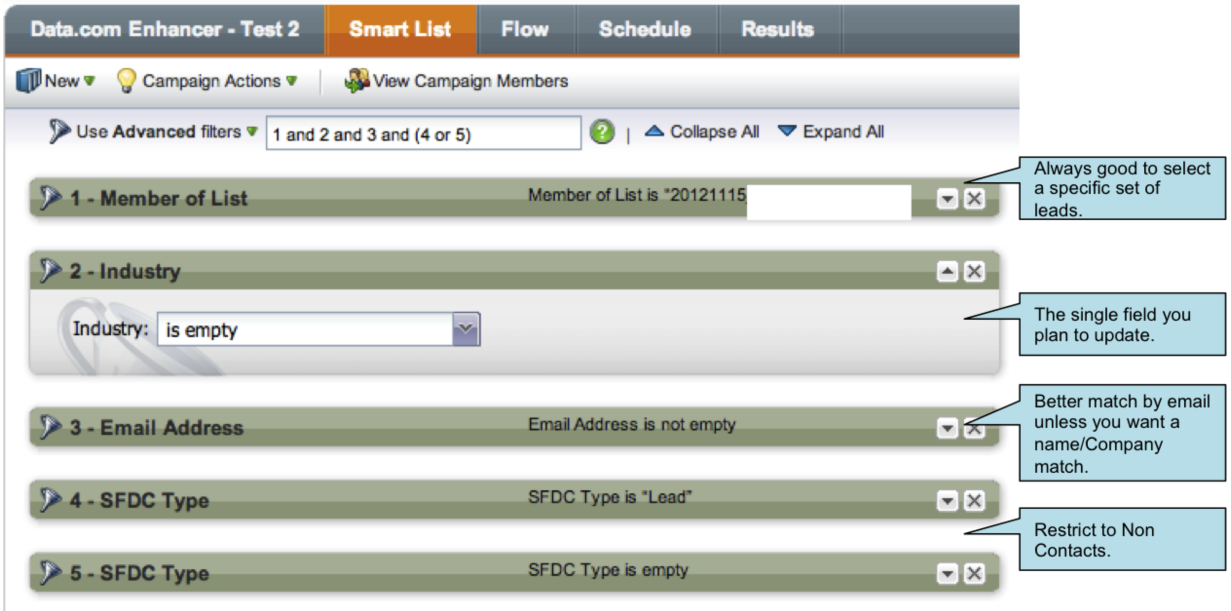
Step 5: Create a Smart Campaign for this run

You could name it `Data.com Enhancer for Webinars`.

Step 6: Smart List: select the Leads to include

Whom you include is up to you. In this example I want to restrict the updates to

- Salesforce Leads OR Marketo only Leads (never Contacts or Clients).
- `Member of List` – say, webinar leads.
- Leads with an `Email Address` for best matching
- `Industry IS EMPTY` (replace with desired, single field)



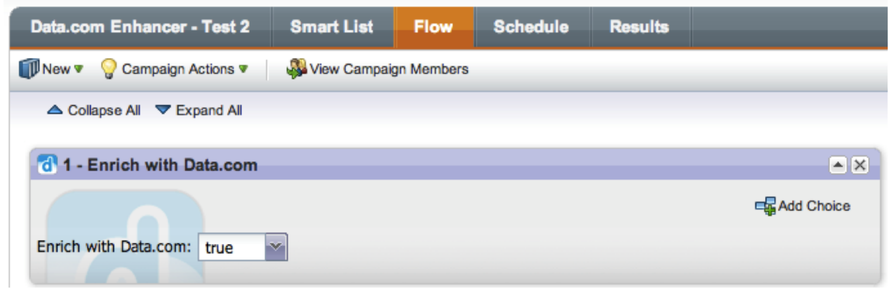
Step 7: Select One Field to Update

In this case, I chose `Industry`. It is critical to use `IS EMPTY` here because we never want to overwrite existing field data. With this Smart List, only leads with no `Industry` will be updated with just the `Industry` information, since we blocked the other fields.

Step 8: Unblock the Field in Previous Step

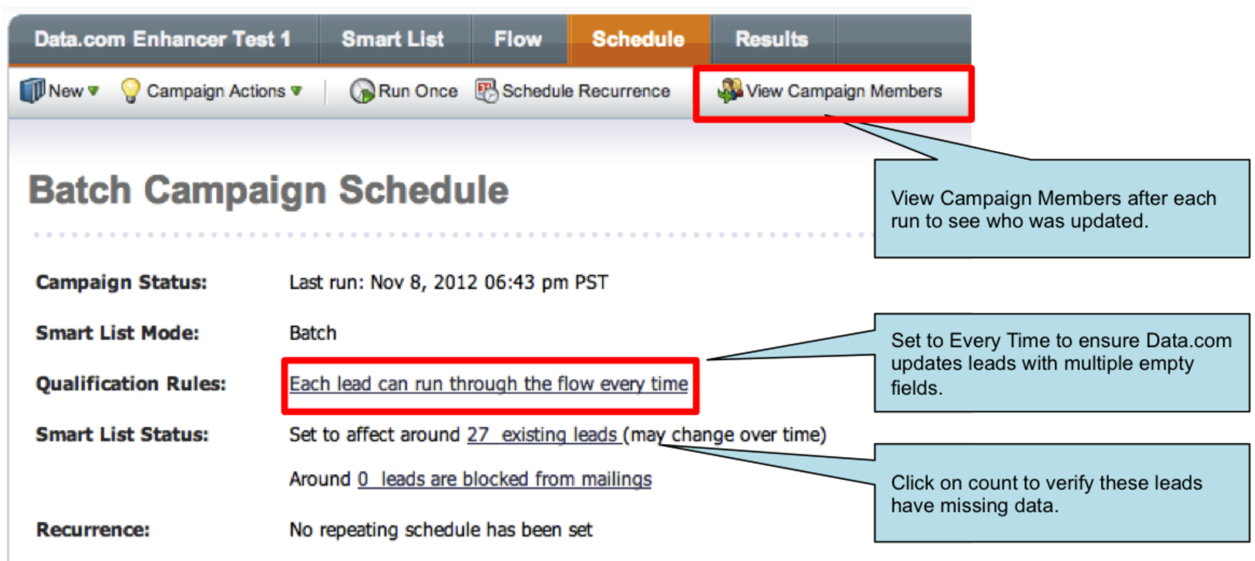
In another browser tab, keep `Admin>Field Blocking` open. Now unblock the field `Industry`, just for Data.com updates.

Step 9: Flow: Enhance with Data.com = True



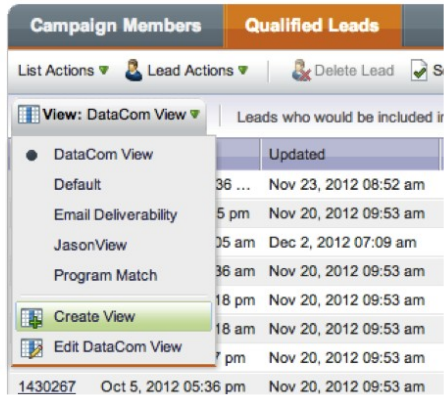
Step 10: Schedule: Check Qualified List

Click on Schedule to view the qualified count. I highly recommend clicking the number to view the Qualified Leads for this run, just to be sure they all have `Industry` missing.

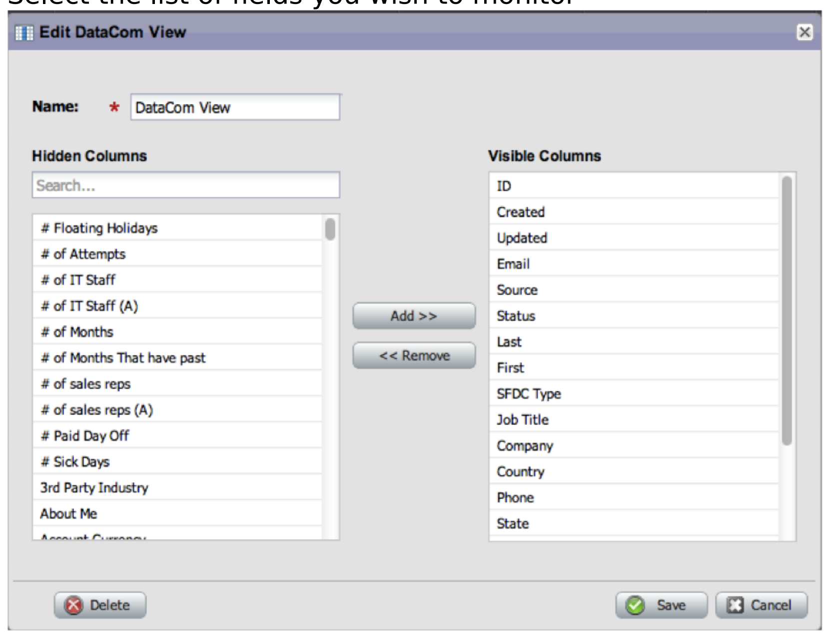


Step 11: Create a New View called Data.com View

When you click on the qualified count, a new lead view will appear. Make sure you create a new View called `DataCom View` so you can monitor all the Data.com fields you plan to enhance.



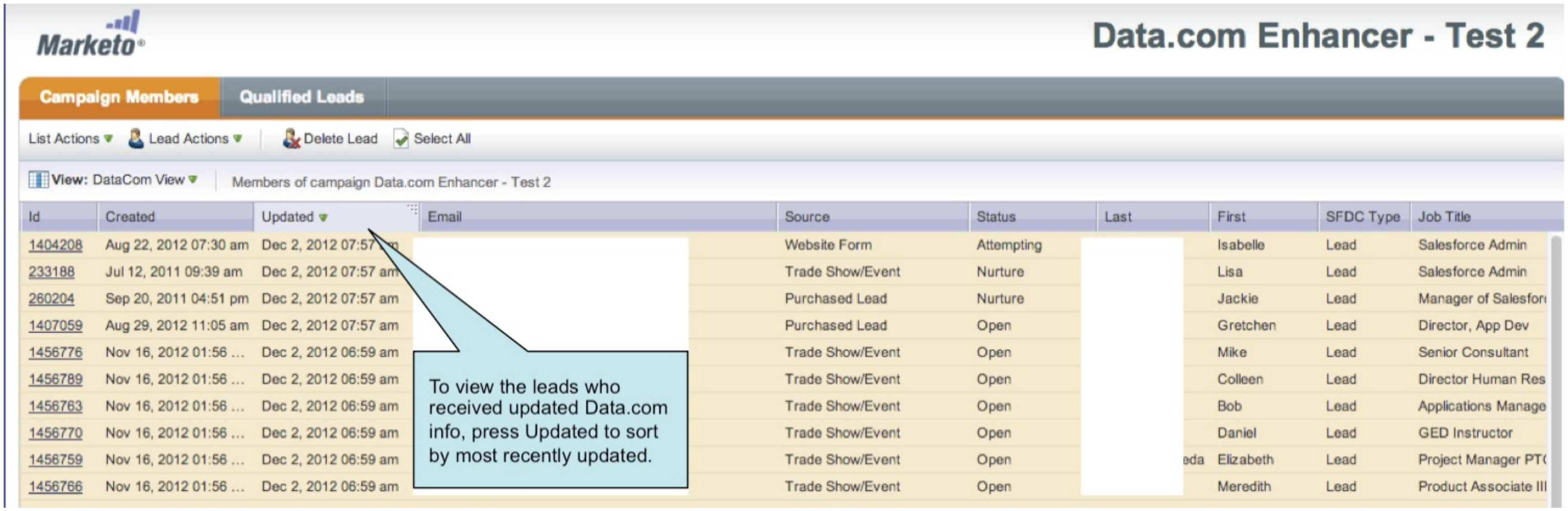
Step 12: Select the list of fields you wish to monitor



Step 13: Schedule: Run Every Time
Since you want to include the same leads for each field

Step 14: Run Once

Step 15: Check your list to see how many records were updated
You can do this using the Campaign Members or checking your list and pressing the refresh icon at the bottom.



Step 16: Repeat this process for each field.
Yes, I know this is laborious, however for the 5 to 10 fields you can update with Data.com, it's worth it to avoid overwriting key fields.

Chapter Review

Self-Quiz

True or False: You can use a Data.com+Salesforce login for Marketo's Data.com enhancer.

___

How many credits does each lead update use?

___

When can you use an automatic Enrich with Data.com campaign?

___

___

Recommended Resources

Marketo Documentation Marketo

[Data.com Enhancer Overview]

[Enhancing with Data.com] (Explains simple batch updates)

[Configure Data.com in Marketo]

[Data.com Field Mapping]

[How to do Field Blocking]

Marketo Community

[Data.com or ReachForce Smart Forms]

[InsideView or Data.com] – also good points about Data.com Enrichment

[Data.com really means Jigsaw.com]

[Vote to Improve the Enhance with Data.com action]

Tools

Data.com

Jigsaw.com

ReachForce.com

InsideView.com

ZoomInfo.com

Chapter 14. Sell Faster with Sales Insight

At a Glance

Overview

Note: Sales Insight is now a standard feature with Sales User licenses based on fees. Ask your Marketo rep for details.

Sales Insight (or Marketo Sales Insight, MSI), is a tool designed to help sales people understand more about their leads and customers. The tool is part of our Marketo platform and is fully integrated into Salesforce. You only need to go to your Lead record to see the information that will help you have a conversation with the Lead.

Marketo is able to collect additional information on what someone is doing on our site, with our emails, and with our offers. Sales Insight puts this detail in a useful format for you to understand what the Lead is interested in and what they have been up to.

Inside Sales Reps (ISRs, SDRs) use Sales Insight for:

- Preparing for the First Call
- Preparing for the Discovery Call

Sales Managers, Field Reps, and BDRs use MSI for:

- Preparing for the Discovery Call.
- Preparing for meetings or calls at any stage in the sales process.
- Monitoring `Lead→Contact→Opportunity` progress. Instead of guessing what is going on with a Proposal, you can see if your Contact and his colleagues are on your site, thinking of you, even if they are not responding to your calls.

Marketing uses MSI to enable Sales with more tools, faster:

- Watching test leads.
- Collecting data on what Interesting Moments tend to lead to Won Opps.
- Creating Interesting Moments and useful data for Sales.

Sales Insight is the critical tool I wish I had when I was in Sales. The additional details on current Leads and Clients would have given me an edge in focused solution conversations. The Anonymous Web Activity would have given me brilliant new prospecting ideas. Let's get started helping your team.

Marketo Sales Insight Setup

Note: this section is for Marketers and System Administrators only.

If you have purchased Sales Insight user seats for your team, you will need to install the MSI package into Salesforce or MS Dynamics. This Guide assumes you are using Salesforce, so please refer to the Sales Insight for MS Dynamics Instructions if you need them. Sales Insight for Salesforce instructions are here.

Installation in Salesforce

Since Marketo has detailed instructions, I will only show you the highlights here.

Step 1: Make sure Salesforce sync is working

Visit `Admin > Salesforce` to see if there are any errors. If not, continue.

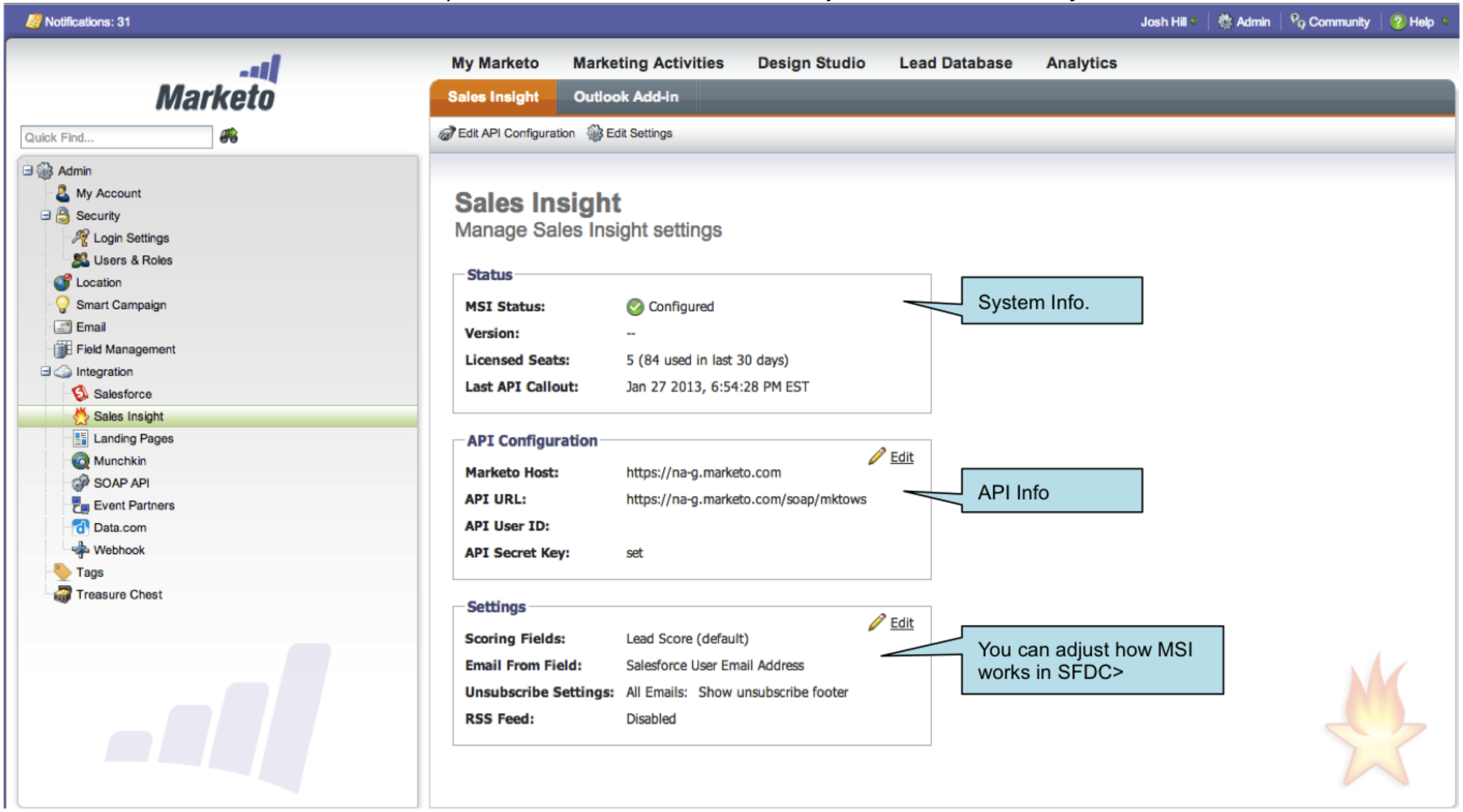
Step 2: Remove extra Marketo tabs in Salesforce

You may have a Marketo or About Marketo tab appearing for some users. You may wish to disable these for Sales Profiles.

Step 3: Install the Marketo Sales Insight App

You must be a Salesforce Admin for your organization to do this. It is here on the AppExchange.

Step 4: Go to Marketo > Admin to adjust the API Secret Key



Step 5: Continue setup inside Salesforce.

Step 6: Setup Users who can view Sales Insight

You may want to restrict users of MSI with a SFDC Profile. See these instructions. If you also want to remove access to MSI features, be sure to remove the following from the Page Layouts since Profiles will not restrict the following features:

- MSI Buttons for Contacts, Leads, and Accounts.
- MSI columns from Contact and Lead list views.

Step 7: Adjust Page Layouts for Leads, Contacts, and Accounts

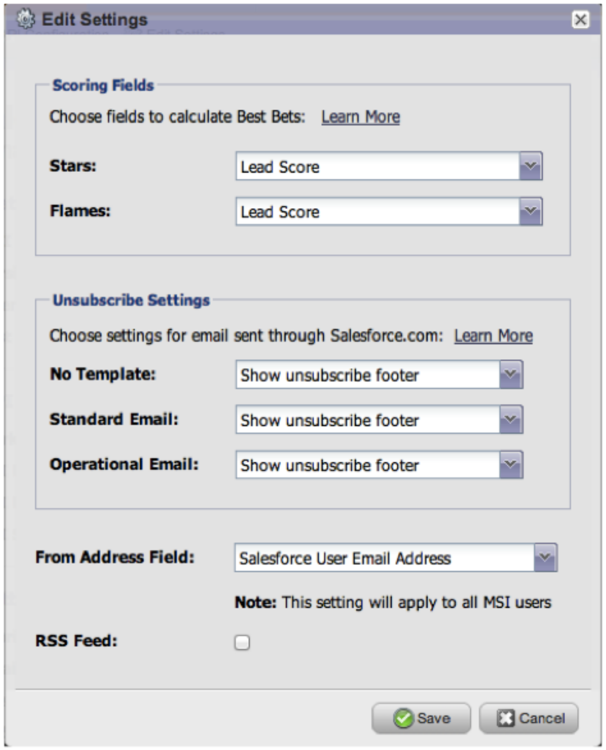
Warning: Professional Edition users must make MSI fields visible on all Page Layouts. Enterprise Users must make those fields visible to the Marketo User or MSI will not work.

You must do this to make the Marketo Page Section show the detail from Sales Insight. I recommend reviewing the position of the Marketo Section and other fields.

Take this moment to make the Marketo Tab visible to the intended Sales Users or they will have to set it up themselves later (which is harder to convince them to do).

MSI Settings

If you visit Admin > Integration > Sales Insight, you will be able to adjust some of the settings. You can safely adjust these settings.



Scoring Fields: use these to calculate Best Bets. Only adjust these if you are using customized scoring fields.

Unsubscribe Settings: if a Salesperson uses Sales Insight emails in SFDC, you can force the use of the Unsubscribe footer, or turn it off. You should keep this set to the default `Show Unsubscribe Footer` since many MSI emails are bulk and could cause spam alarms to go off.

From Address Field: this will force the From Address in MSI SFDC emails to be the `SFDC User's Email Address`.

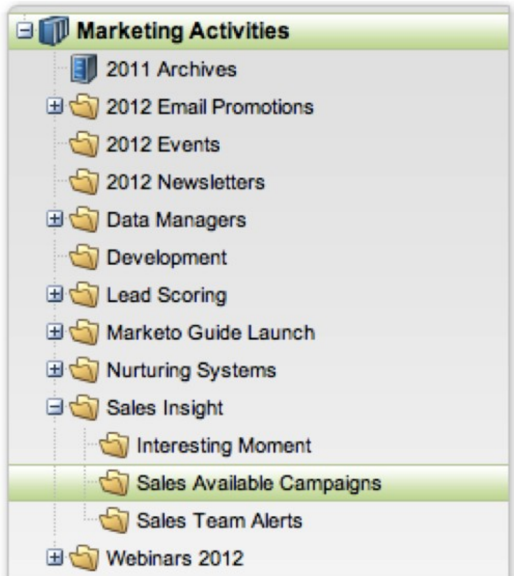
RSS Feed: do you want to allow MSI users to subscribe to their feed via RSS?

You can repair Sales Insight errors with [these instructions].

Interesting Moments Setup

Interesting Moments don't happen on their own. They need help from you! Marketo allows you to customize these special records based on your own business. Think of Interesting Moments as special triggered events you want your Sales team to know about.

Remember Naming and Organization do matter. Marketo has a default Interesting Moments folder. I like to move all Sales Insight related materials to a single section like so:



Activity History vs. Interesting Moments

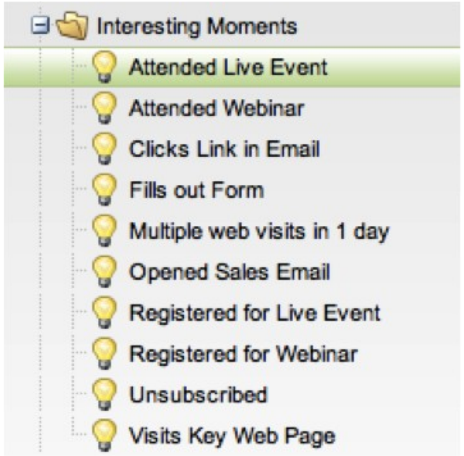
But why do Interesting Moments when Marketo is already posting Activities to my Salesforce records?

Great question. There are good reasons to use both at the same time, even though Activities often overlap with the possible Interesting Moments.

- **Activity History and Data Ownership**: some firms are nervous about switching vendors in the future. If you outgrow Marketo or the CEO loves another system and you have to switch, you will always retain your Activity History in your CRM. It is possible to export Interesting Moments out of Marketo, but it will be less useful to reimport.
- **Interesting Moments are more customizable than Activity History**. The funny thing is your Sales Team may be used to looking at Activity History now, so getting them to use MSI regularly is always a challenge. Interesting Moments however, are customizable. You get to write the messages to Sales telling them about what their Leads and Contacts are up to. You can also better trigger other flows using `Has Interesting Moment`.
- **Double Checking**: it can be helpful to have an automatic recording to check against if an Interesting Moment or other triggered flow is not working as you expected.
- **Backup From Sync Failure**: if your SFDC Sync ever fails, Activity History is **not recorded** back to SFDC during the failure period. Interesting Moments will continue to be recorded by Marketo and then synced over to MSI once the sync is restored.

Trigger Flows

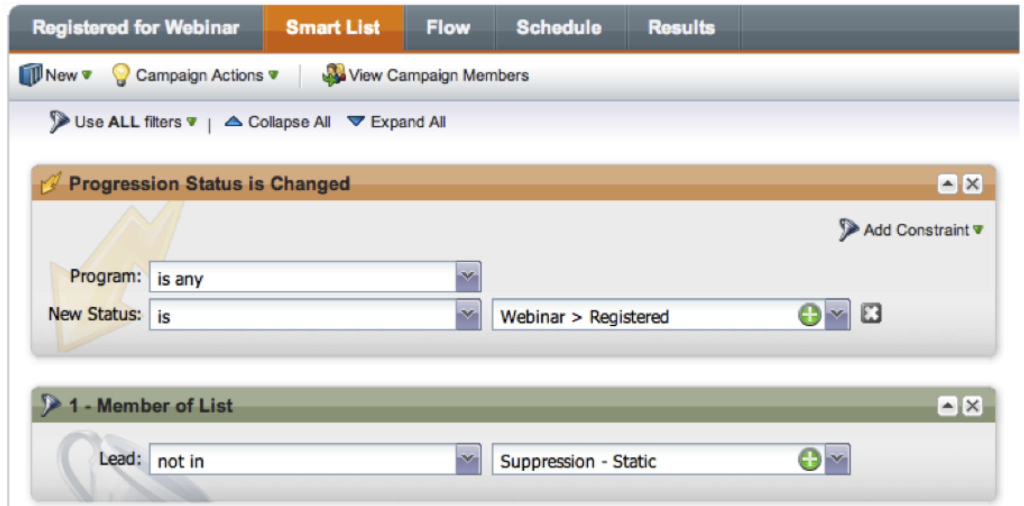
Since Interesting Moments can vary widely by firm, I will show you a few of the most common Moments. You can go anywhere from here. Here are some of the Community's [Favorite Interesting Moments] and how some will look inside Marketo as activated trigger campaigns. See the next few pages for how a few of these work.



Registered for Webinar

Step 1: Smart List: Progression Status is Changed

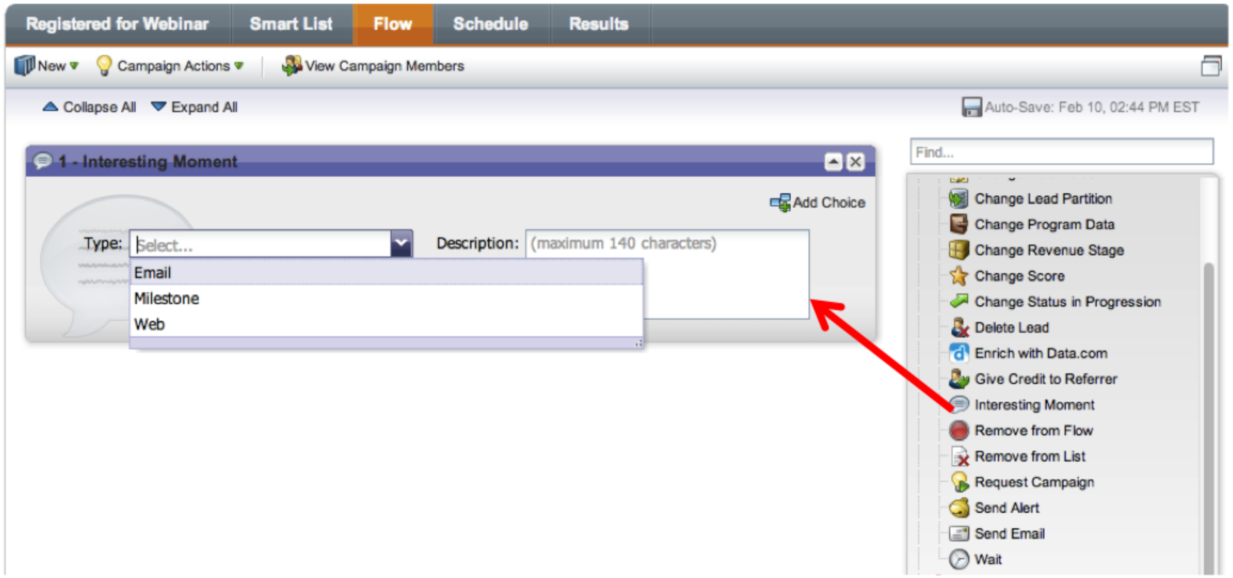
Note that I often use a Suppression List to prevent bad leads from registering or even showing data.



Step 2: Flow: Interesting Moment

Bring in the Interesting Moment Flow Action.

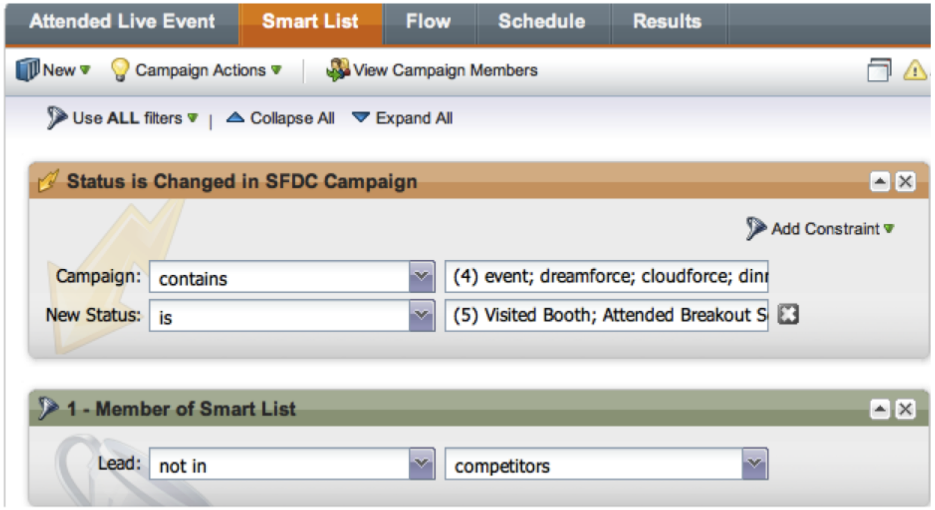
You can use three different "Types" of Moments to call out certain actions. Use Milestone for key Form Fill Outs like Registered for Webinar or Requested Demo.



Attended Live Event

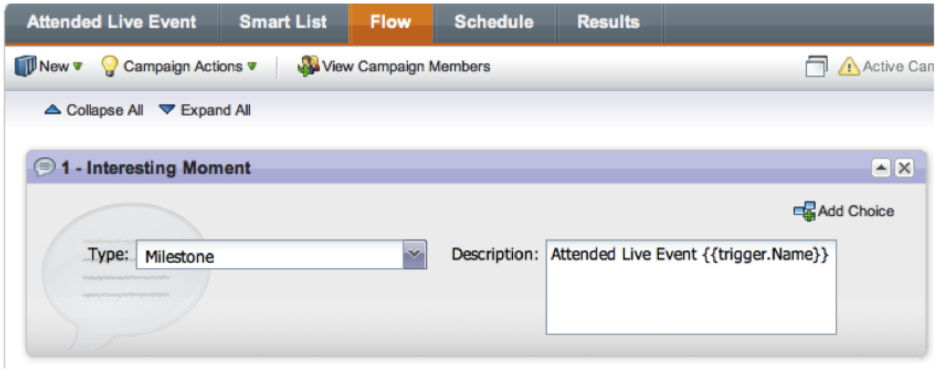
Step 1: Smart List: Status is Changed in SFDC Campaign

You can also use `Progression is Changed` here. This is a good example of using SFDC Campaigns to help drive actions in Marketo.



Step 2: Flow: Interesting Moment

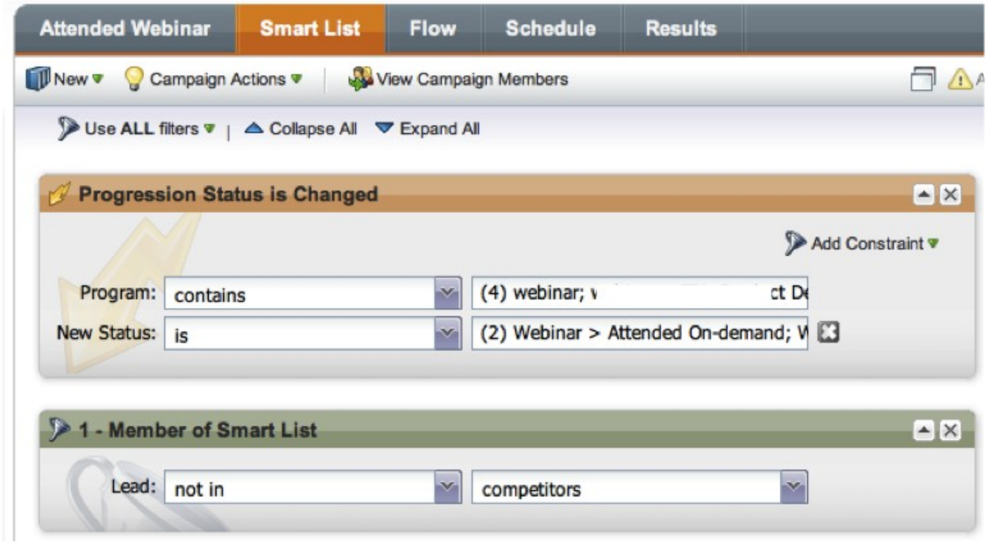
Here I used the `{{trigger.Name}}` token that will bring in the name of the Salesforce Campaign.



Attended Webinar

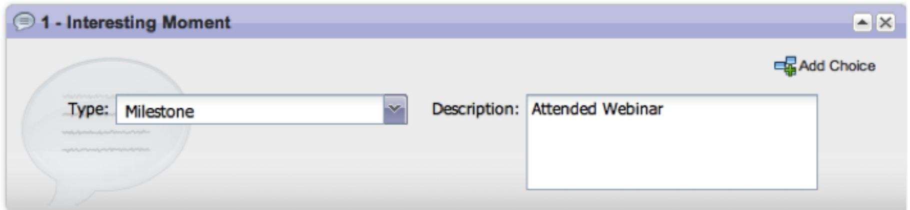
Step 1: Smart List: Progression Status is Changed

If you setup the Webinar names correctly, you can just use `CONTAINS "Webinar"` to find any webinar instead of having to update this list each time. As soon as GoToWebinar updates Marketo, this flow will trigger, creating a nice message inside Sales Insight for each qualifying Lead.



Step 2: Flow: Interesting Moment

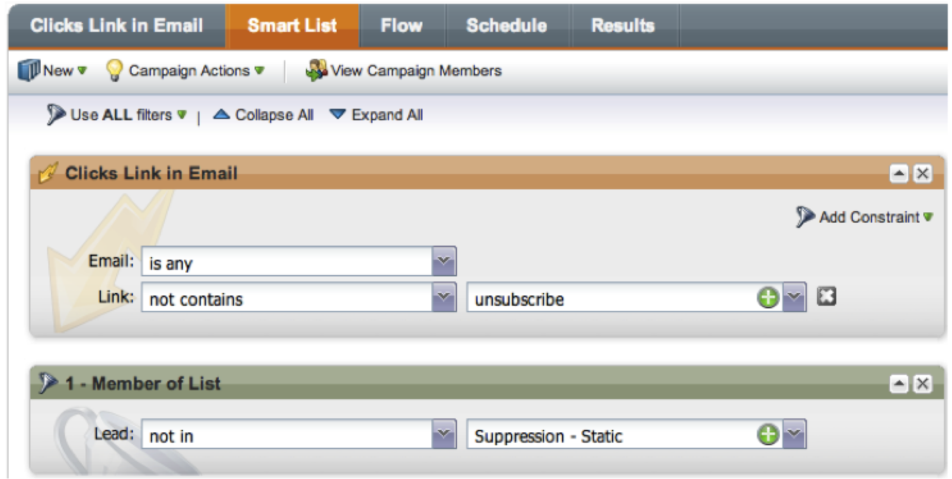
An Interesting Moment can be as simple as this.



Clicked Link in Email

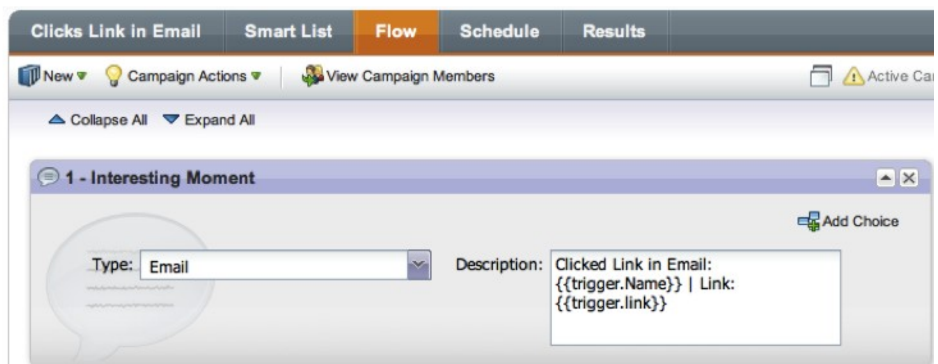
Step 1: Smart List: Clicks Link in Email

You can make this more specific, but usually avoid the unsubscribe links.



Step 2: Flow: Interesting Moment

See how I used both the Email Name and the actual Link URL using the tokens. See the next section for a helpful list.



Tokens for Interesting Moments

Marketo permits use of special tokens for Interesting Moments. Use these to pull in detail from the original Trigger, such as the Email Name, Link, or Web Page. You can also use Flow Tokens or My.Tokens here as well.

Trigger	Constraint	Token	Best Use
Clicks Link in Email	Trigger Name (Email) Name Link (Link URL) Subject (of Email)	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Link}} {{trigger.Subject}}	Most Emails
Fills Out Form	Trigger Name (Form) Name Web Page Client IP Address	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Web Page}} {{trigger.Client IP Address}}	Any Form!
Email Bounces	Trigger Name (Email) Name Category Details Subject	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Category} {{trigger.Details}} {{trigger.Subject}}	Hard bounces if email becomes invalid, but I never use this.
Email Bounces Soft	Trigger Name (Email) Name Category Details Subject	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Category} {{trigger.Details}} {{trigger.Subject}}	Not useful
Email is Delivered	Trigger Name Name Subject	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Subject}}	Not useful
Opens Email	Trigger Name Name Subject	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger.Subject}}	Helpful
Unsubscribes from Email	Trigger Name Name Web Page Client IP Address Subject	{{trigger.Trigger Name}} {{trigger.Name}} {{trigger. Web Page}} {{trigger.Client IP Address}} {{trigger.Subject}}	Sometimes.
Clicks Link in Sales Email	Trigger Name Name (same as Subject) Subject Sent By (user) Link	{{trigger.Trigger Name}} {{trigger.Name}}	Yes.

Trigger	Constraint	Token	Best Use
Is Sent Sales Email	Trigger Name Name (same as Subject) Subject Sent by	{{trigger.Trigger Name}} {{trigger.Name}}	Yes. Best to record these to avoid resending.
Opens Sales Email	Trigger Name Name (same as Subject) Subject Sent by	{{trigger.Trigger Name}} {{trigger.Name}}	Yes.
Sales Email is Received	Trigger Name Name (same as Subject) Subject Sent by	{{trigger.Trigger Name}} {{trigger.Name}}	No.
Visits Web Page	Web Page Referrer Search Engine (used) Search Query (if available)	{{trigger. Web Page}} {{trigger.Referrer}} {{trigger.Search Engine}} {{trigger.Search Query}}	Yes, use this.

There may be new tokens on the way. Vote for this Idea.

Sales Insight Exposed Emails

You can "expose" an email in Marketo to Sales Insight where your Sales Team can then see it using the Sales Insight `Send Email` action inside Salesforce.

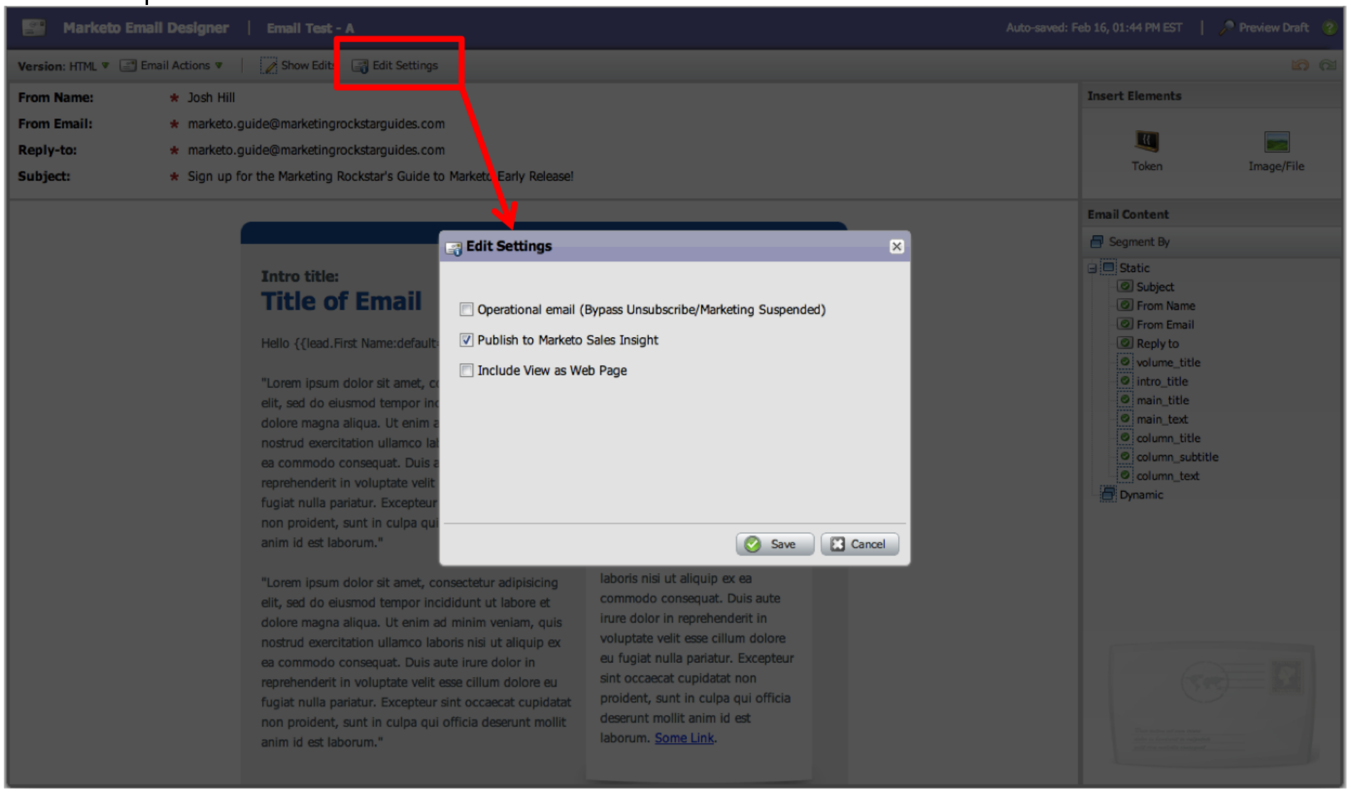
When should you allow Sales to see one of your emails in MSI or the Outlook Plugin?

Type of Email	Expose to MSI?	Duration
Webinar Invitation	Yes	Only until event starts then turn it off.
Event Invitation	Yes	Only until event starts then turn it off.
Nurturing Emails	Use Campaign IS Requested instead.	Usually better to allow Sales to insert a Lead into the flow.
White Paper Download	Sometimes	I prefer to let sales write a persona note instead.
Newsletter	No.	Never. This is a marketing email.
Brochure Email	Sometimes.	I prefer to let sales write a persona note instead.

Some teams love using the Outlook Plugin or the MSI Email Tool to send and record all the emails they need. In that case, exposing more basic emails such as White Paper blasts and pre-made Brochure links can speed things along.

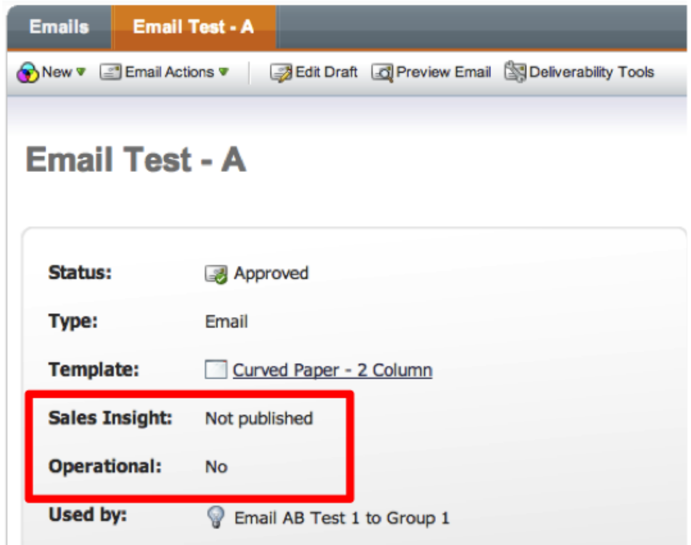
How to Add an Email to Sales Insight

Step 1: Edit the Email

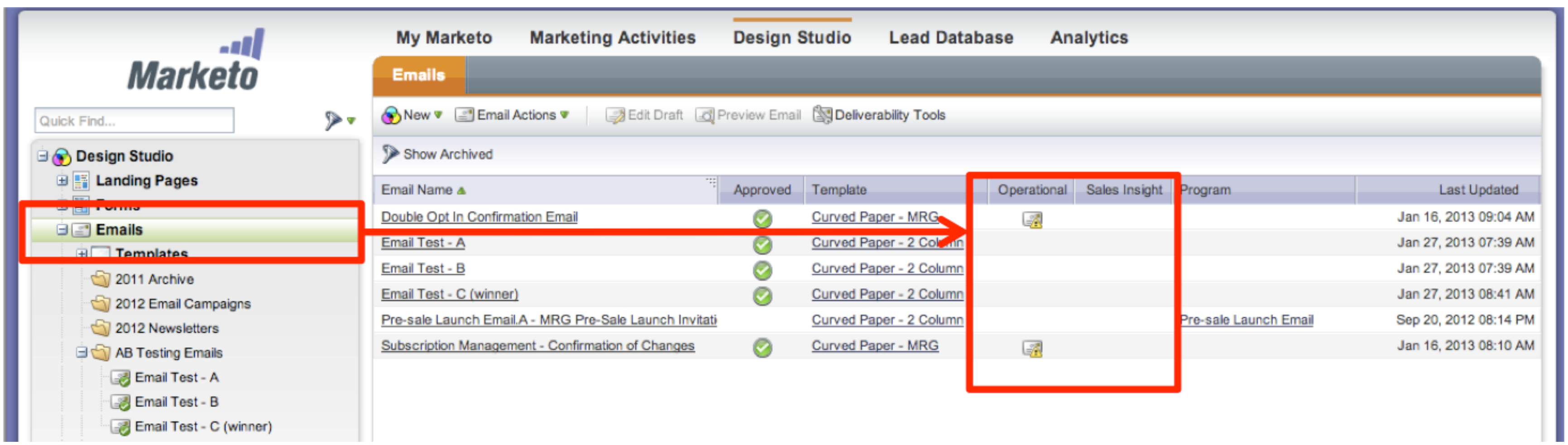


Step 2: Email Settings > Select Publish to Sales Insight

You can tell if an email is Published to Sales Insight by viewing its Summary Page



Or click on the Email folder in Design Studio to bring up the list of emails.



Managing MSI Emails

Best Practice: turn off MSI emails each month or a mess ensues!

Remember to remove emails from Sales Insight on a regular basis. I know of firms that neglected a regular cleaning to end up with hundreds of emails in a giant drop down menu inside Salesforce. The sales team was repulsed from figuring out which emails to use. So choose each email to expose to Sales very carefully and be sure to put a note in your Calendar to turn them off when they are no longer needed.

And remember that naming matters here! Be sure your emails have dates and great names so Sales knows which email to use—they are not keen to sort it out themselves.

Sales Insight Exposed Campaigns

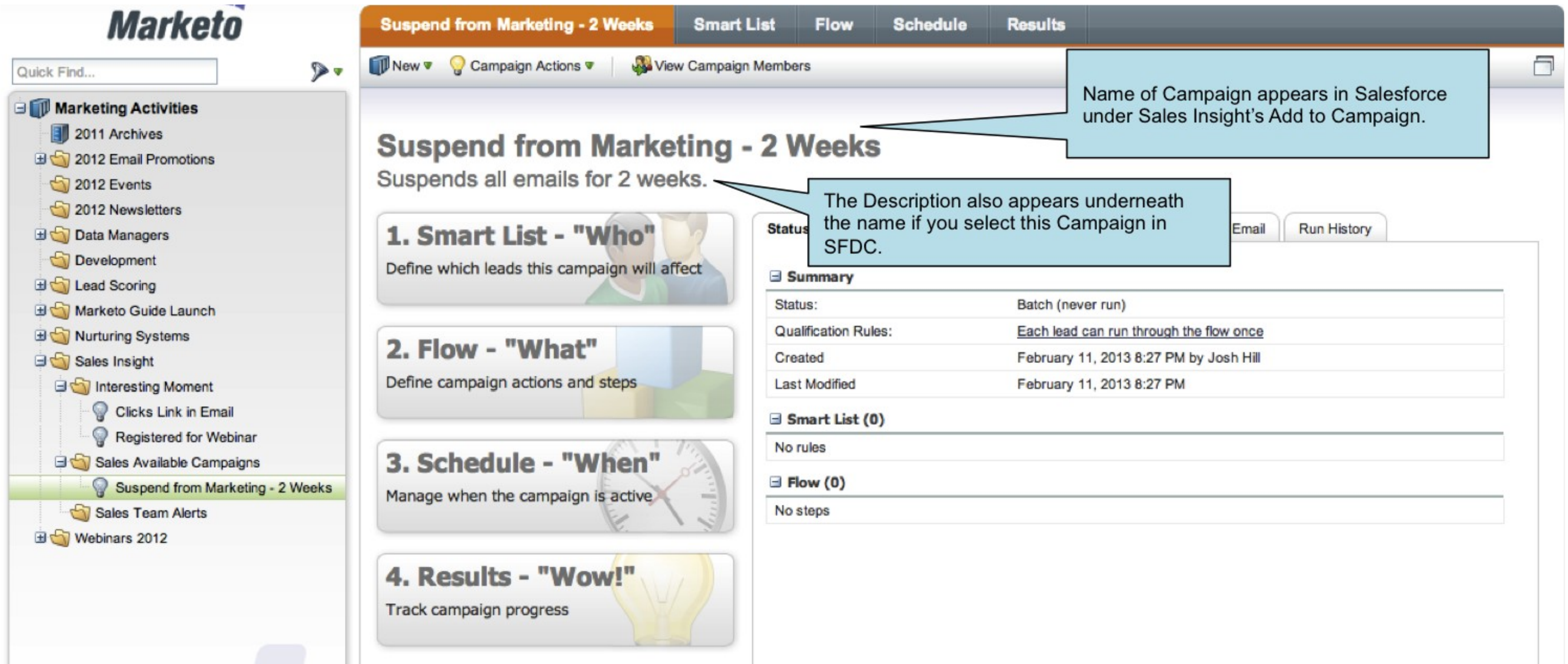
You can expose any campaign to Sales Insight whenever you use the Trigger `Campaign Is Requested by "Sales Insight"`. Many firms choose to allow Sales to drop Leads or Contacts into special nurturing campaigns to push out information automatically. Marketing can also allow Sales to adjust data or throttle email using this technique. The most common options are nurturing and Marketing Suspended.

Create a Marketing Suspended Campaign for Sales

Step 1: Create a new Campaign

Call it `Marketing Suspended – 2 Weeks`

This name is important because Sales will see it inside Salesforce. Make it clear.

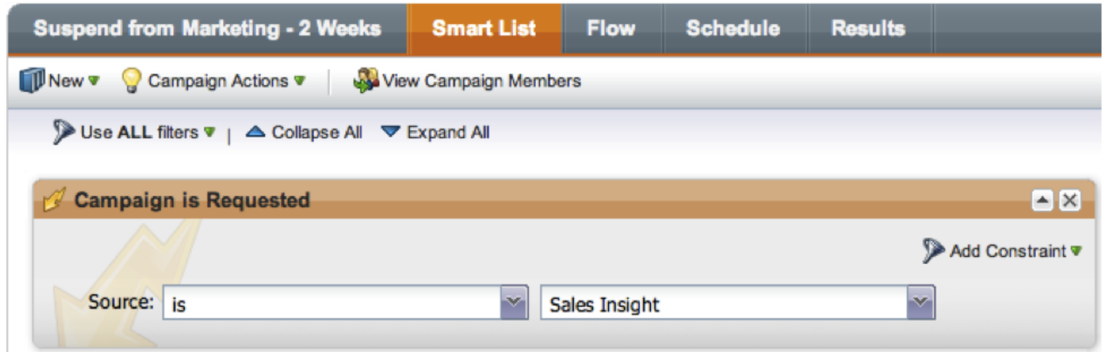


Step 2: Add a useful description

This is one campaign where you do want to fill this box in because it will help Salespeople later on.

Step 3: Smart List

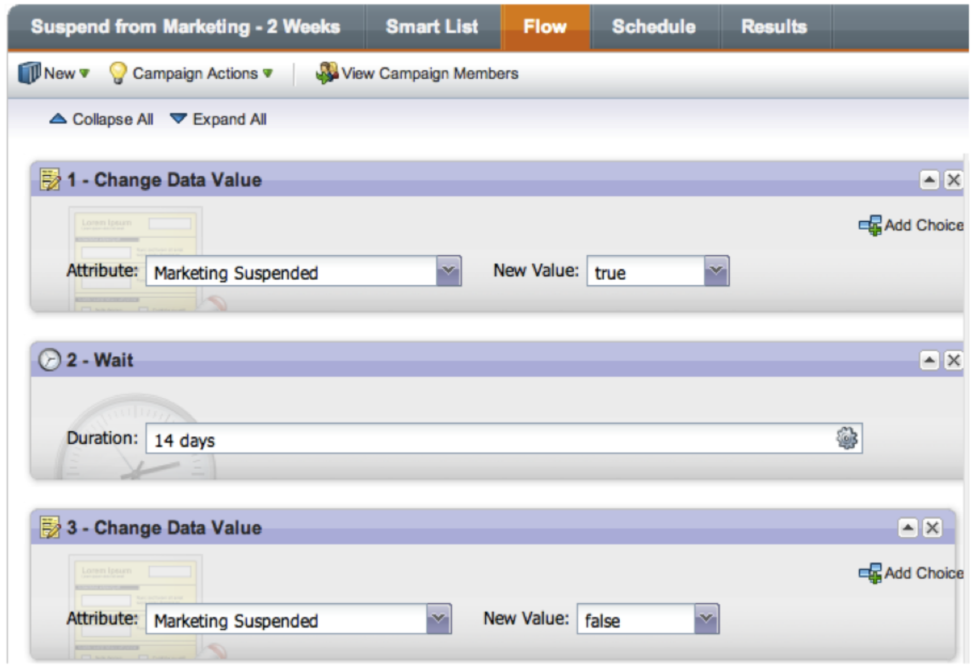
Drag in the `Campaign Is Requested` action.



Step 4: Flow

Drag in the following steps. Remember, you can do this for other fields as well.

In this situation I selected a `Wait Duration of 2 Weeks`. You can choose any other time. You could also have Marketo `Send Alert` to the `Lead Owner` at the end of the 2 weeks to let them know the Lead is now available for marketing campaigns.



Step 5: Schedule

`Qualification Rule: Every 14 days` because the Lead will exit this flow after 14 days.

Activate.

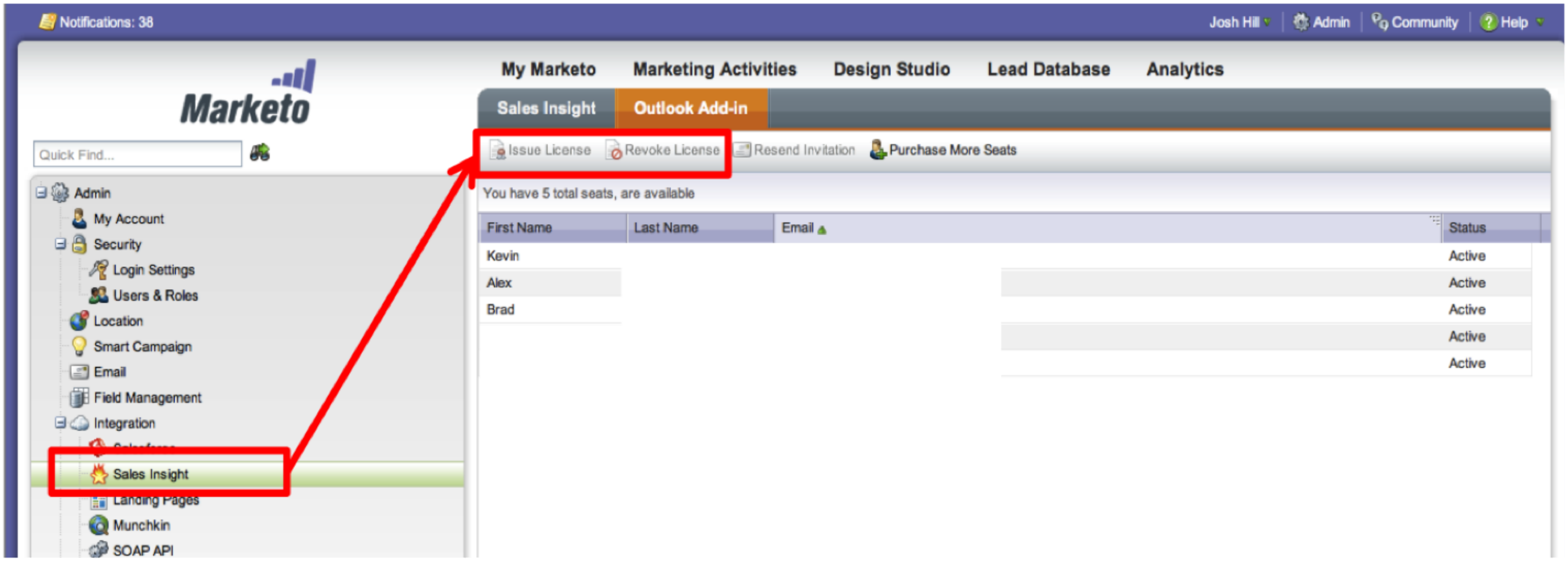
MS Outlook Plug-in

This is where you can setup the sales team to use the [Marketo Outlook Plug In](). (And some [real world advice]()). I recommend testing this with Salespeople who are technically savvy and who communicate with you as the Outlook Plug-in occasionally has hiccups.

Step 1: Go to Admin > Sales Insight > Outlook Add-in

Step 2: Invite a User (Issue License)

To setup a new Outlook User, you must invite that person using an available license. If you have no more MSI licenses available, you must use the `Purchase` button or `Revoke` another user's license.



Step 3: Install the Marketo Outlook Plugin on the User's Machine

The Outlook User must choose the correct 32/64bit installer version.

Step 4: Enter the Personal Information

Be sure to enter the Registration Code from the Invitation Email.

Re-open Outlook

You will now see the Marketo Plugin to allow you to do `New Marketo Message` (from approved Sales Insight Emails) and `Log with Marketo` to post non-Marketo emails back to the Lead record.

Sales Insight Training for Sales

Note: this section is for Salespeople. You may purchase additional copies for your MSI Training Day.

How Do I Make Money from this?

Sales reps will ask this question before they tune MSI out. Salespeople want to focus on sales and not spend time on new systems. Great sales reps, however, will spend time preparing for calls using the best intelligence they can. Sales Insight is their intelligence tool.

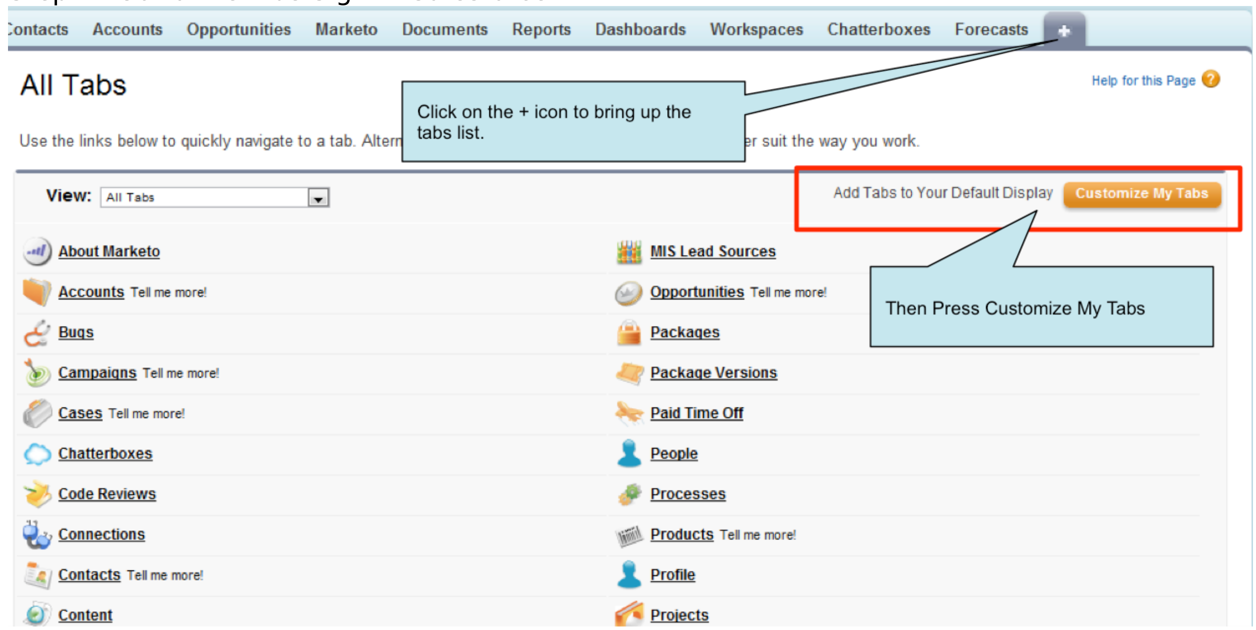
Sales Insight provides more visibility into the behaviors of people on your Site, your Emails, and your Events. Certain behaviors indicate the Lead is starting, engaging, or closing the Buying Process. Use the information MSI provides to help prepare for Sales calls:

- Ask better questions.
- Ask relevant questions earlier to demonstrate understanding of their needs.
- Know when to call.
- Know when not to call.
- Spot potential RFP activity early using Activity, Anonymous Web Activity.
- Use Anonymous Web Activity to prospect and call Leads before our competitors.

Adding the Sales Insight Tab

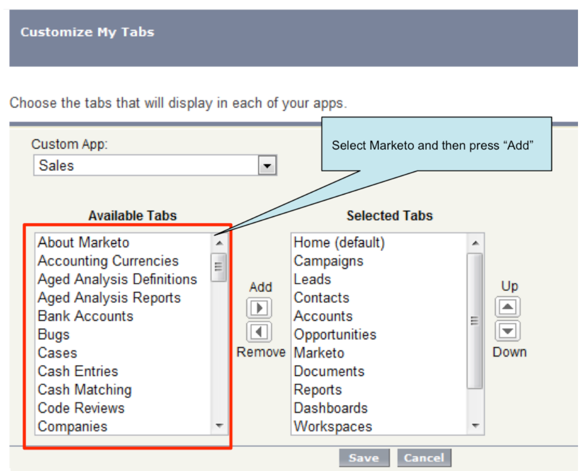
If you don't see it already, you will need to add the Marketo Tab to your Salesforce tabs at the top of the screen. You must do this to see all the great tools Marketo Sales Insight (MSI) offers.

Step 1: Go to the Plus Sign in Salesforce



Step 2: Select the "Marketo" tab to the Selected Tabs box

Watch out! There are sometimes 3 Marketo tab options. You want the one that just says Marketo.

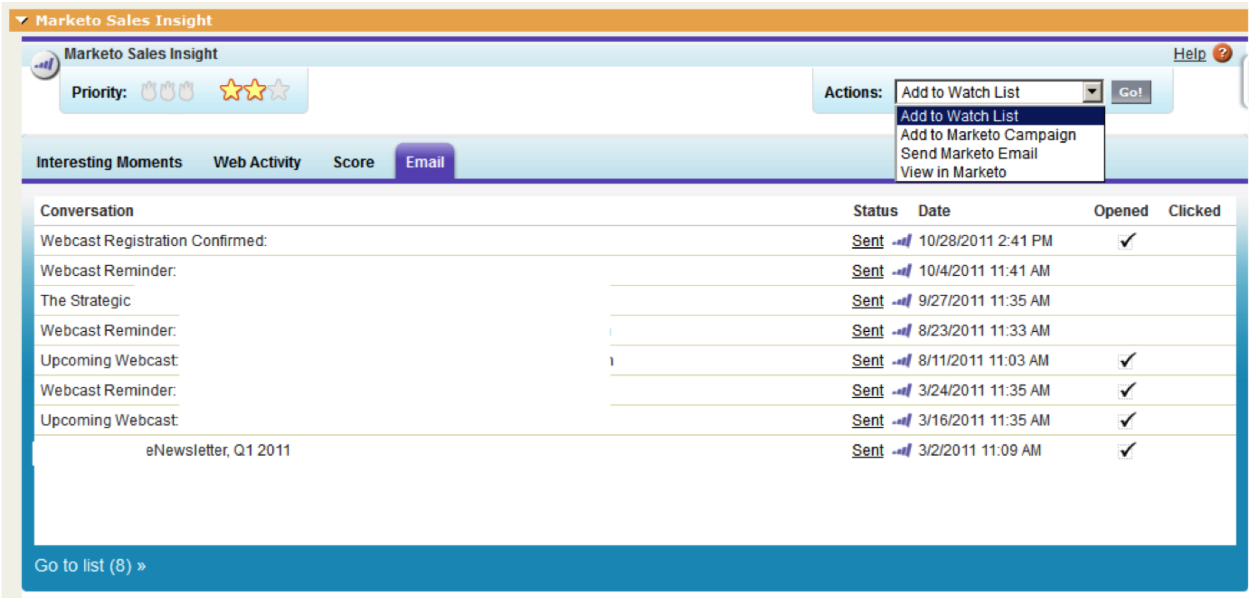


Sales Insight on Lead Records: Knowledge is Revenue

Marketo and MSI add tremendous detail about a Lead’s activity and show this data directly on the Salesforce record. The data is shown for Leads and for Contacts. Sometimes this data also appears on Account and Opportunity records depending on your system’s setup. This is valuable data on how your Lead is engaging with your firm and your firm’s website.

For instance, you can see which pages a Lead is visiting. Is it a product page? A webinar? The Career page? Did they already see a demo or have they been missing for the last 6 months? With Marketo you know *before* you call so you can focus the discussion quickly.

Marketo Sales Insight record section has four tabs:



Tab	What is this?	What it Means for Sales
Interesting Moments	Key events in the person's marketing history like watching a demo.	These details tell you what Forms, White Papers, Webinars, and Special Web Pages the Lead visited. Know why you’re calling.

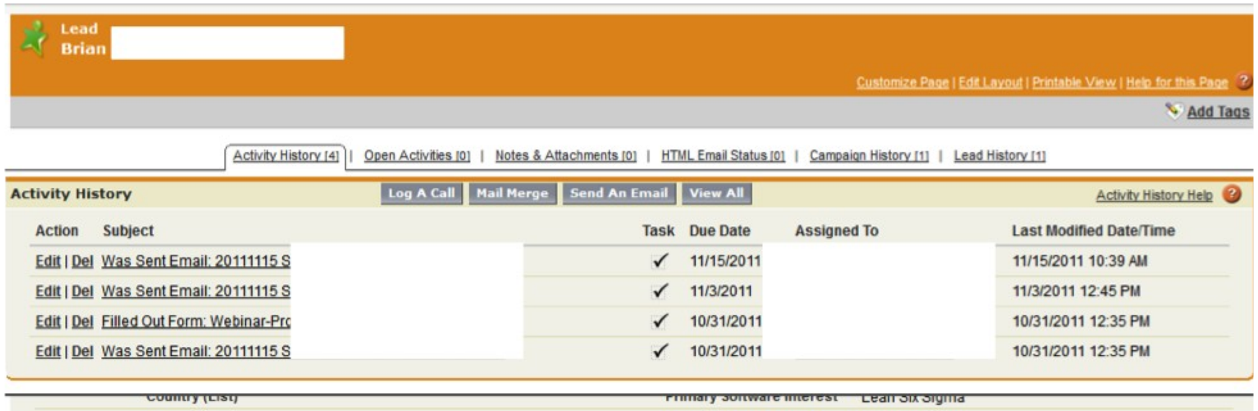
Tab	What is this?	What it Means for Sales
Web Activity	Web pages visited with timestamp and search terms used.	What is the lead searching for? Can you add to the conversation?
Score	The complete scoring history for this person.	Scoring helps you prioritize Leads for Contact. The tab shows why and how the Score changed.
Email	Opens and clicks for all emails sent through Marketo.	Marketing and Marketo email history shows how the Lead reacted to our emails. Sent-nothing. Opened: we know they may have read it. Clicked: they were motivated to come to our site.

Best Practice: Interesting Moments provide the most detail on actions taken by the Lead.

Activity History

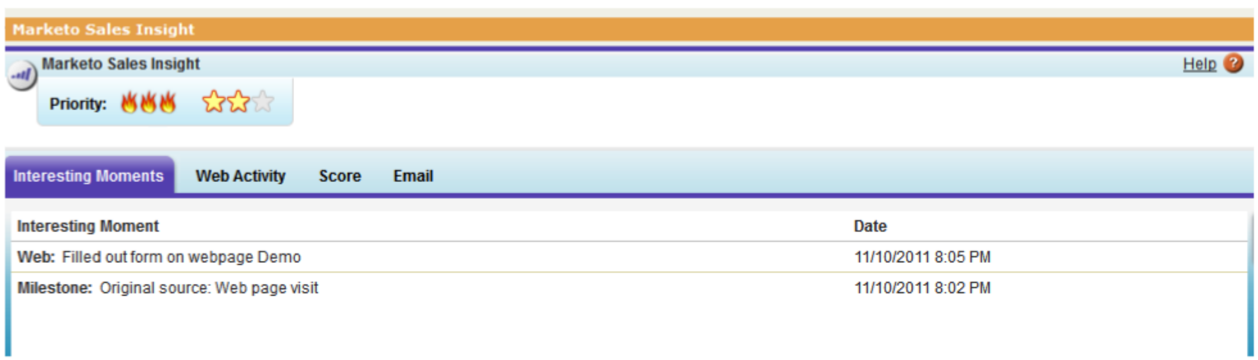
You may already be familiar with the Activity and Tasks in Salesforce. Marketo may also attach Activities here as well. If your Marketo is setup to do so, you may find Activity History helps you track the kinds of emails Marketing has been sending out.

Activity Name	What is this?	What it Means for Sales
Sent Email	System or Person sent an email.	A reminder of the kinds of emails being sent by Marketing
Opened Email	Lead Opened an Email	Not all email clients will report this.
Clicked Link	Lead clicked on a link	High engagement.
Sent Sales Email	Lead was Sent an email via Sales Insight.	An automatic note of what you sent the Lead.
Opened Sales Email	The Lead opened your Sales Email	Success! They've paid attention to you. Now what?



Interesting Moments

These are setup by Marketo to automatically inform you of specific actions indicative of a possible buyer. Your team will tell you more about your firm's specific Interesting Moments. In the meantime, here are a few common scenarios.

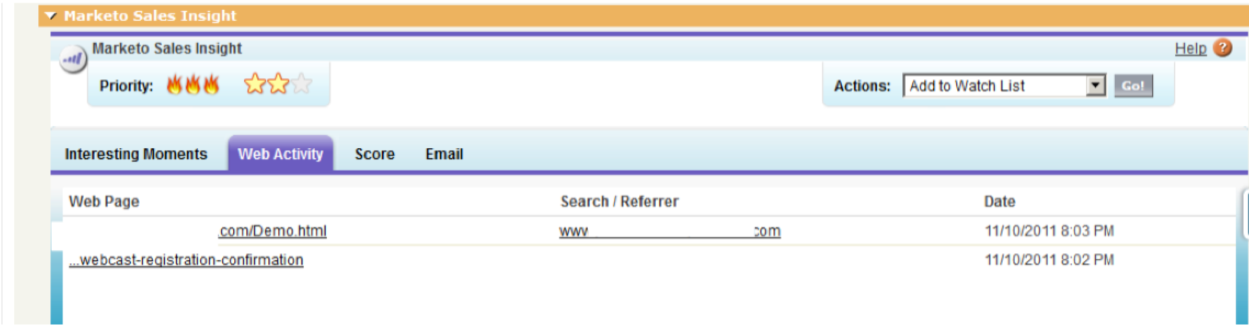


Interesting Moments	What is this?	What it Means for Sales
Fills Out Form	The lead filled out any form on our site.	The lead is engaging to learn more about something. The Form Name and Web Page will be included for you.

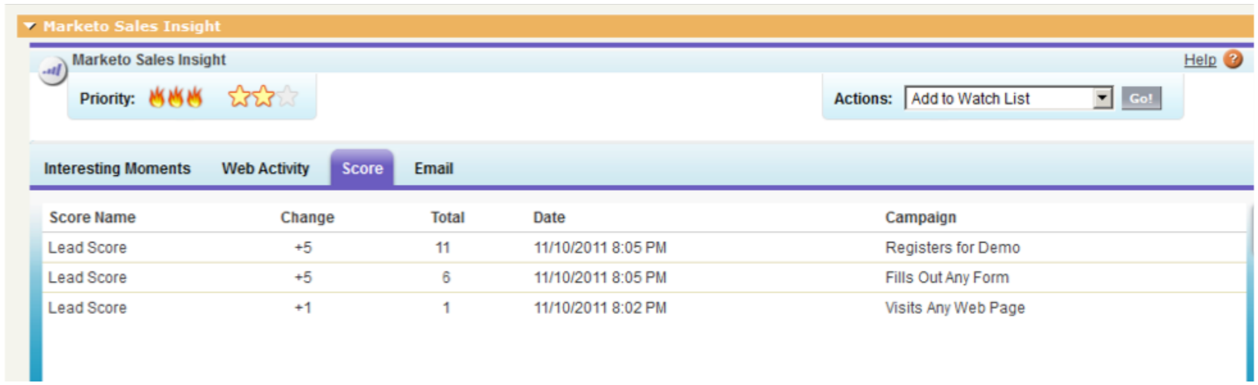
Interesting Moments	What is this?	What it Means for Sales
Viewed IT Recorded Demo	Lead filled out the Demo request form and viewed the Demo page.	Lead is looking at our solution and may be more engaged.
Heavy recent Web Activity	If the Lead was on 7 or more pages in a 7 day period, this will appear.	Perhaps the lead is actively reviewing our content and products.
Opened Sales Email	The Lead Opened an Email we sent them.	The Lead may be engaged.
Submitted Web Contact Inquiry	Lead sent an inquiry via the main Contact Us page.	Usually a more engaged lead looking for an RFP. Leads posted via Marketing.
Unsubscribed	Lead has opted out of all emails.	This is a negative engagement where we can no longer email them.

Web Activity

This is a list of web pages, which the Lead visited, including the Date and the previous Page or Search Terms used. Displays important web pages visited by the Lead. Usually these are Demo, Pricing, or Trial pages.



Lead Score



Sales and Marketing likely worked together to create a ranking system to help you focus on the Leads most ready to buy. Lead Scores appear in a number of places on a record in Salesforce. You may see a Lead Score field with a number like 83, Stars, Flames, and more. The Lead Score tab in the Marketo section is a bit different because it shows you more.

- **Lead Scoring** history: what caused the change in score? This information can help too.
- **Flames**: this lead is HOT if their score went up rapidly.
- **Stars**: this lead is in your target market vs. other leads.

Take a look at the Priority field, at the top of the Marketo Sales Insight section. Priority of a lead is based on Lead Score – a measure of the person's interest in our offers; the higher the lead score, the more likely this person is interested in our products.

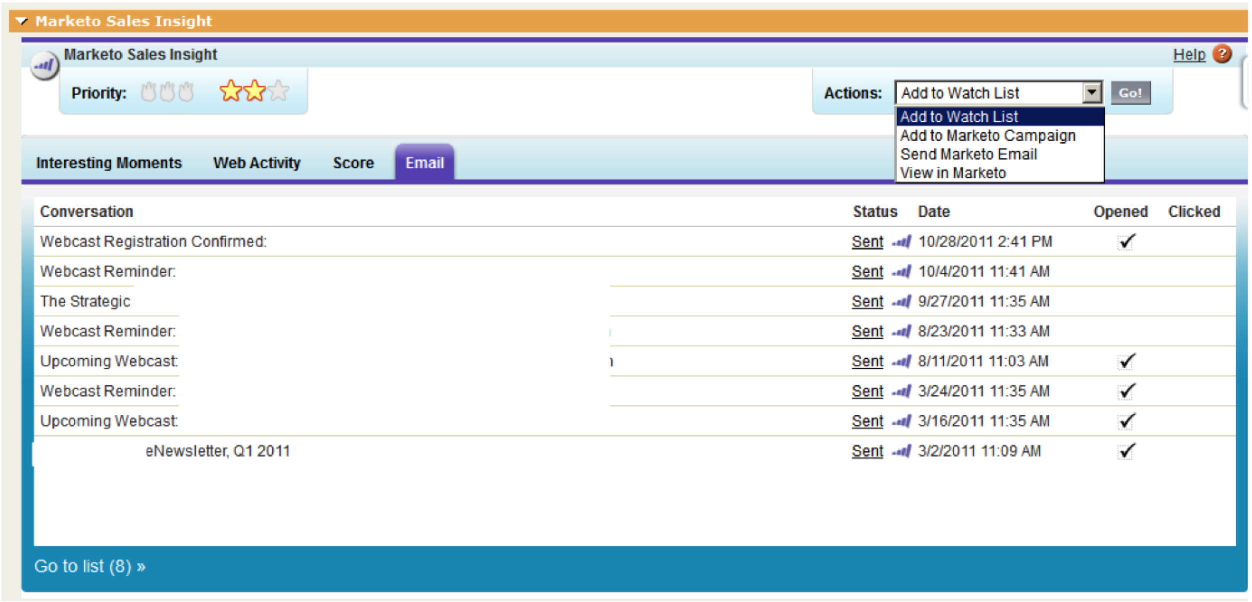
Priority is represented by a combination of flames and can be viewed for each lead or contact. This information can help you size up and prioritize leads and contacts. Here's how it works:

-  **Flames represent urgency** – big, recent jumps in score. Multiple flames mean that this lead is hot; you should call this contact right away. Fewer flames represent that this lead has shown a lower level of interest lately.
-  **Stars** represent relative score – how this individual's lead score compares to other leads. Three stars represents that this lead has shown a higher level of interest in our services compared to a lead with one star.

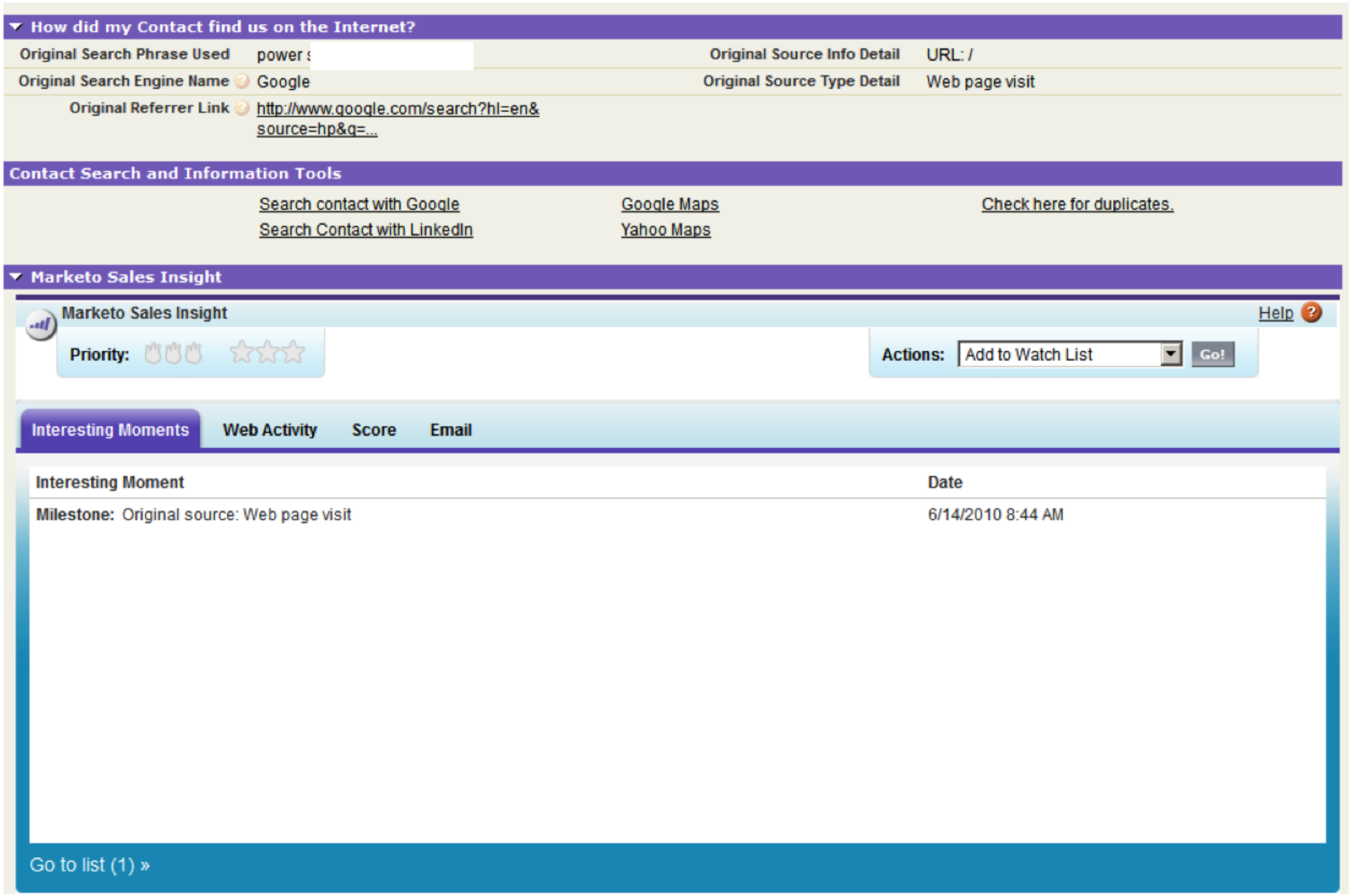
The two scores combine to make a Priority, and you'll see this field on all leads and contacts. Use it to quickly size up leads and contacts so you can pick whom to target.

Email

What sort of communications have we sent? If the Lead Opened or Clicked on an email, that indicates a higher level of engagement for that topic. Be sure to note the emails or topics that appear to be relevant. Craft your call, email, or conversation to discuss those topics.



Sales Insight also resides within each main record type to provide details to help you sell, including Leads, Contacts, Accounts, and Opportunities. Sales Insight looks similar on each record.



The Marketo Tab

This is the Salesperson's dream dashboard – all the lead information in one place, prioritized, and easily monitored. This tab covers *your* territory or owned leads in one spot, rather than having to look at lead after lead.

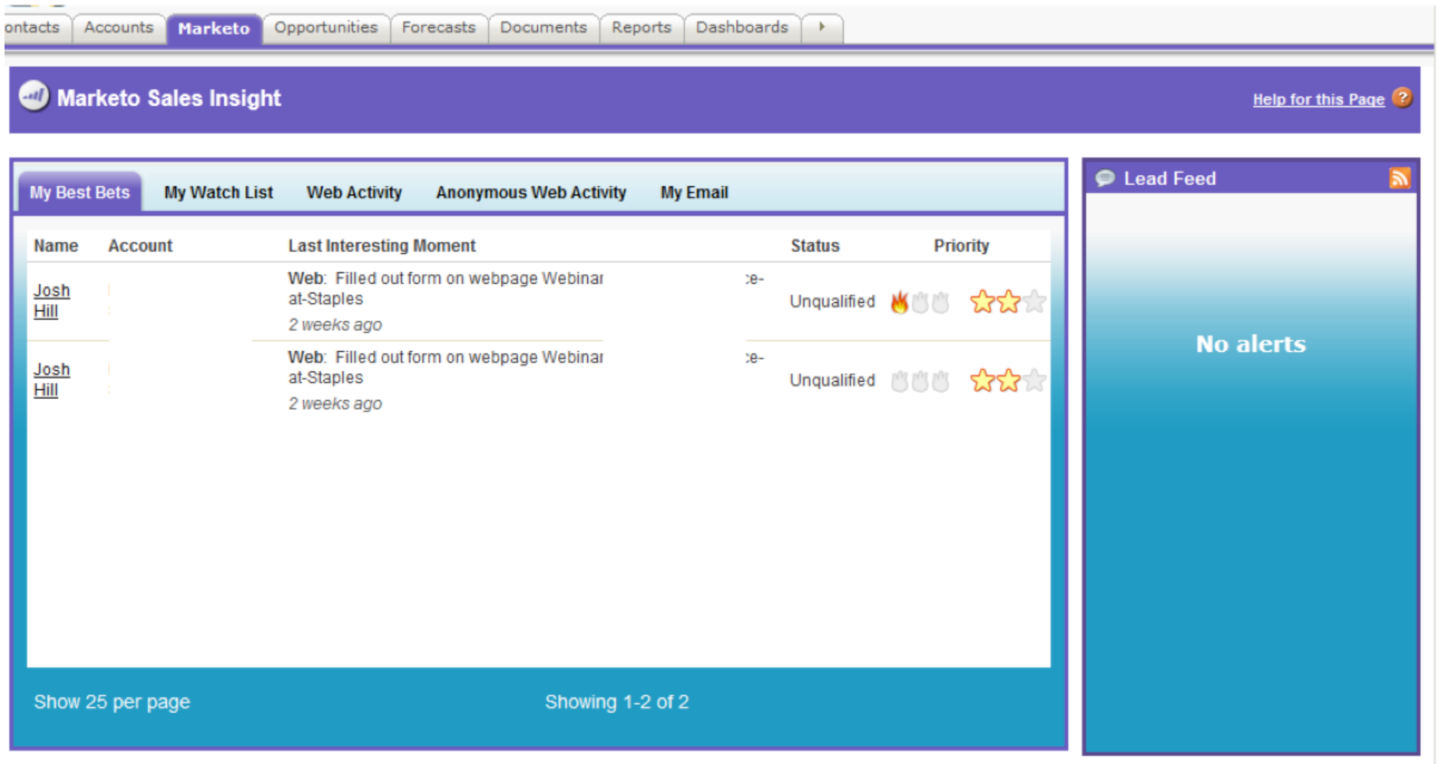
Marketo Dash	What is this?	What it Means for Sales
My Best Bets	Your top priority leads sorted by relative score and urgency.	**RECOMMENDED**! Marketo flags high scoring and urgent leads based on their activity and engagement with us.
My Watch List	Leads you've bookmarked for quick viewing.	Show the last interesting moments and scores for Leads you are monitoring. For instance, call a Lead right after they download a key whitepaper you know is an indicator to buy.
Web Activity	Best Bets and Watch List people who visited your company's website.	See a list of recent activity for Leads you own.
Anonymous Web Activity	People who visited your website but didn't provide contact information.	Monitor activity of companies on our site. Use this to call stale leads at that company if there is a change in their visits to our site.
My Email	Track Marketo emails sent to your leads and contacts.	See if a Lead Opened or Clicked on an Email you sent via Marketo. Then call or follow up appropriately.
Lead Feed (RSS) (if enabled)	The most recent Interesting Moments done by your leads and contacts.	Updated feed of your owned Leads. You can subscribe to a specific Lead's feed or the whole Feed and have it on Google Reader when on the go. Use it to monitor targets and make a call at the right moment.

To get to the Marketo dashboard, click on the Marketo tab in Salesforce.

My Best Bets

Using the Best Bets section on a daily basis will help you prioritize and monitor leads that are more engaged than others. Engaged leads are more likely to go through the sales process, which leads to Won Opportunities, which leads to closed sales.

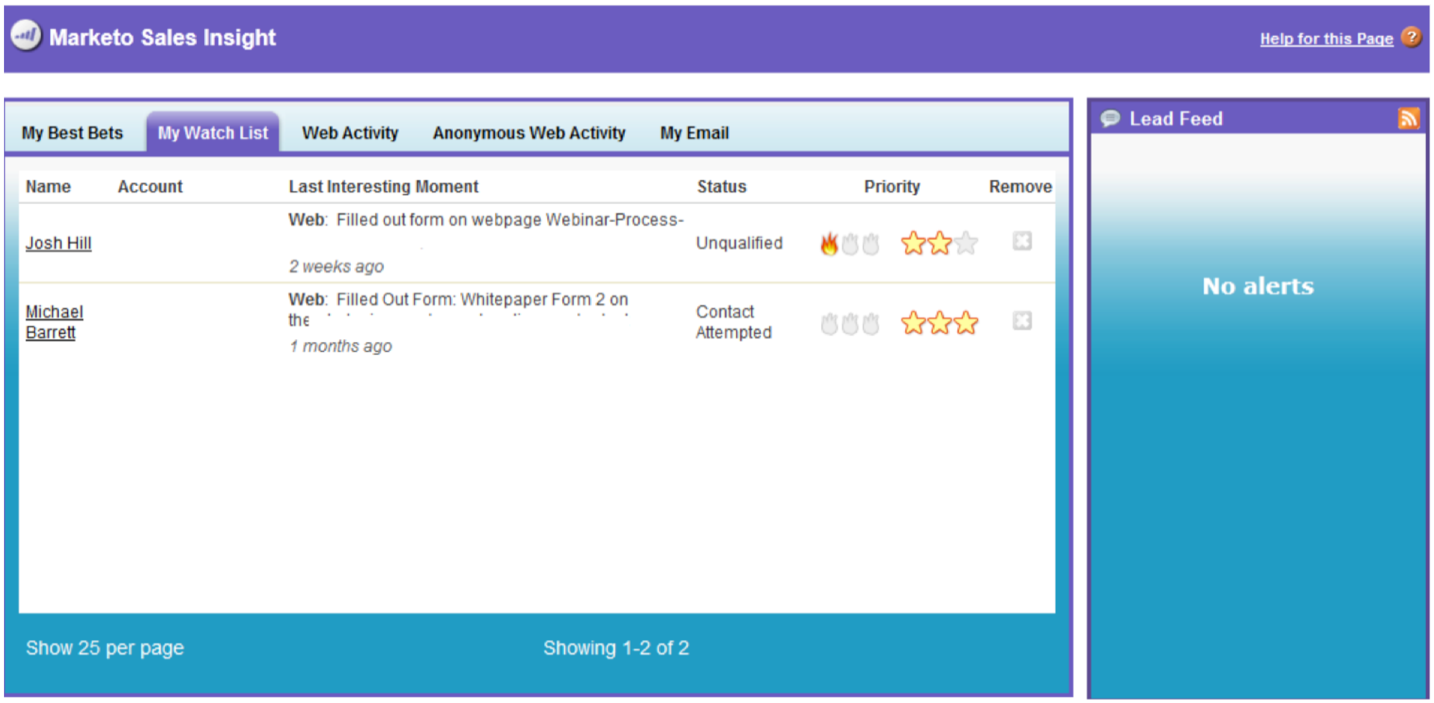
This is a Lead View using Marketo information to help you prioritize high scoring, urgent leads. Marketo will sort these automatically by Priority and Urgency.



My Watch List

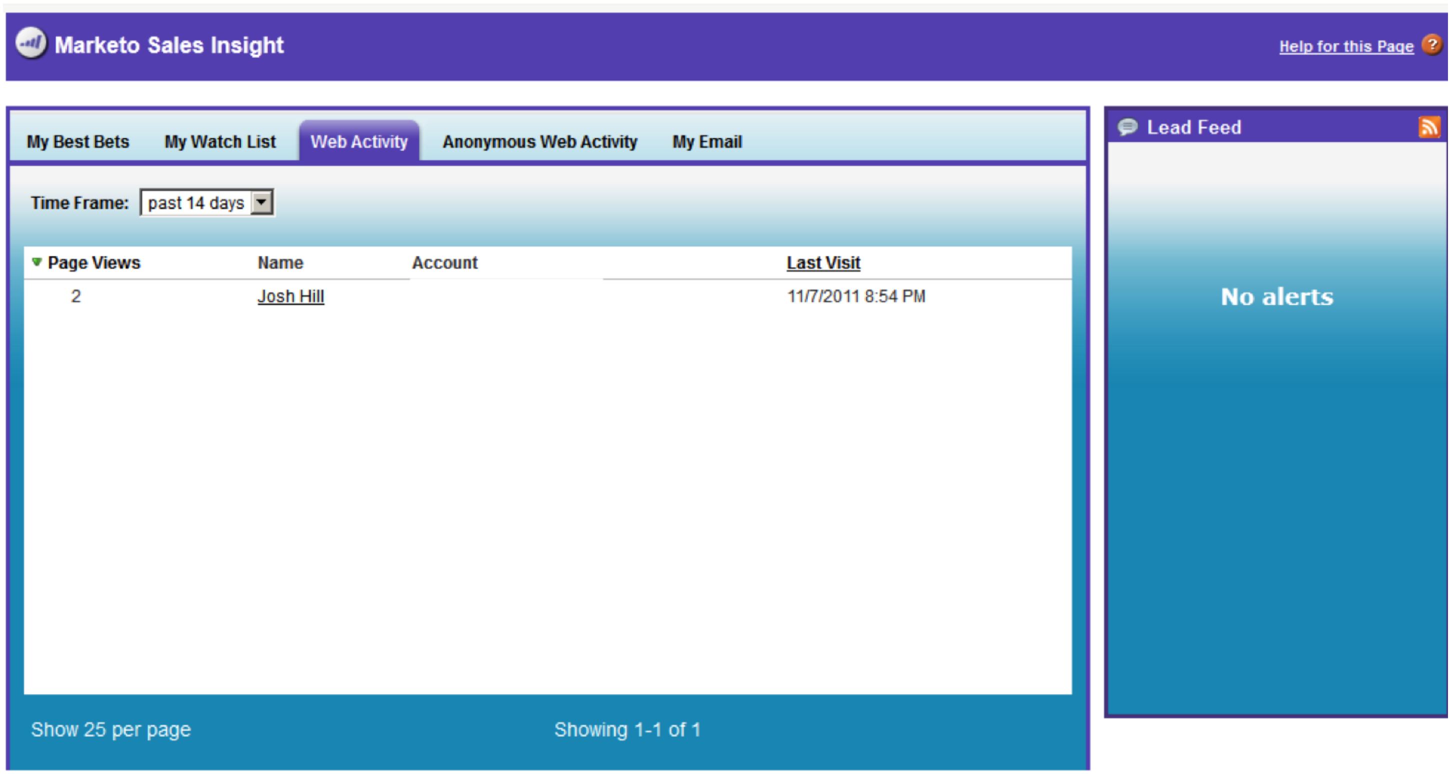
This is your personal lead watch list that you created by adding Leads to Watch. Use it to monitor Leads for certain kinds of activity. E.g.:

- If they are heavy website users, call them to help.
- If they download certain papers or attend a webinar, follow up.



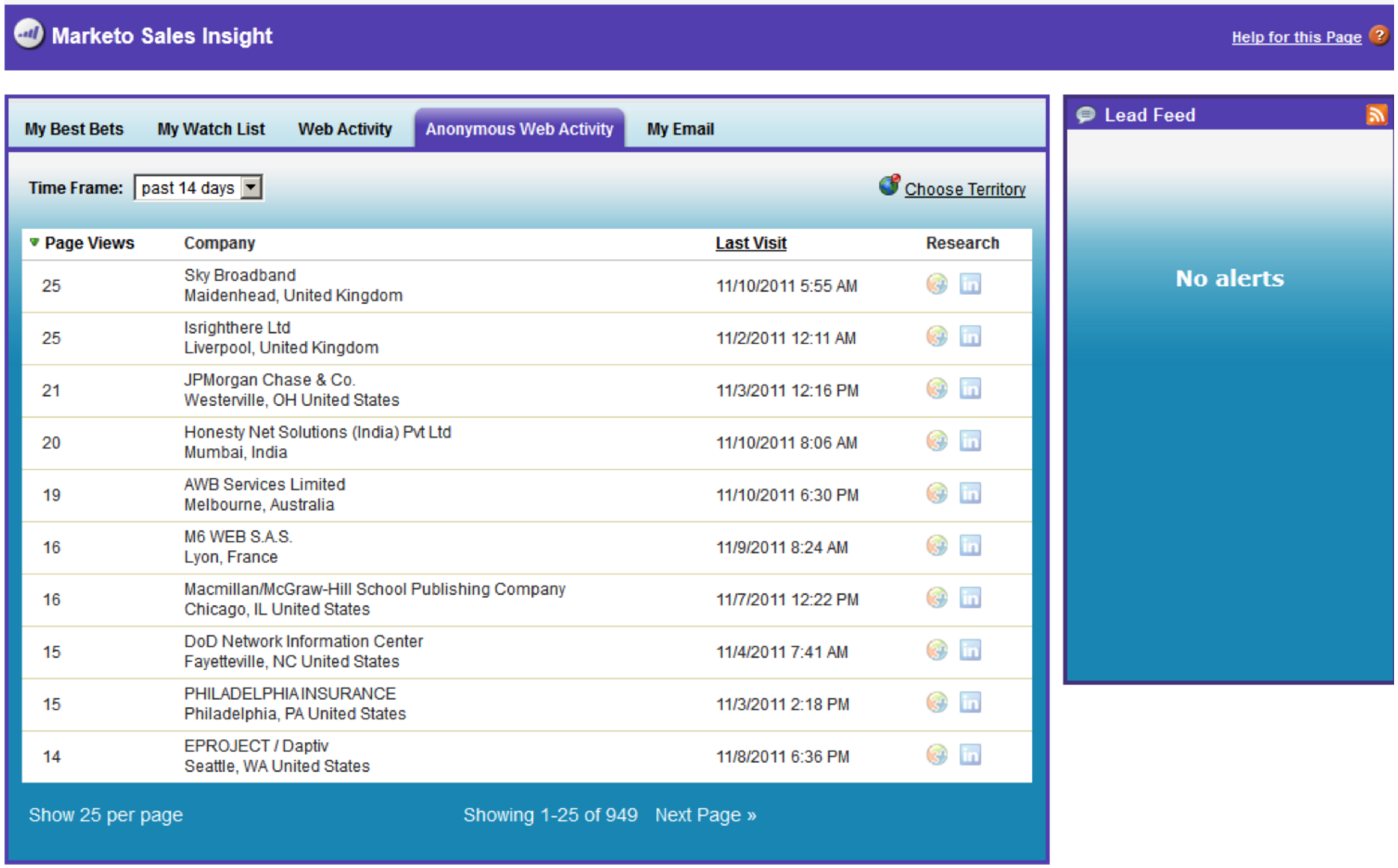
Web Activity

Monitor the pages and visits of Leads so you know what they are thinking about.



Anonymous Web Activity

This tab shows you which firms in your territory are visiting our website. It tells you the Page Views, Company Name, Last Visit.



For each firm, you can then click on the Jigsaw or LinkedIn button to do more research.

How is this helpful?

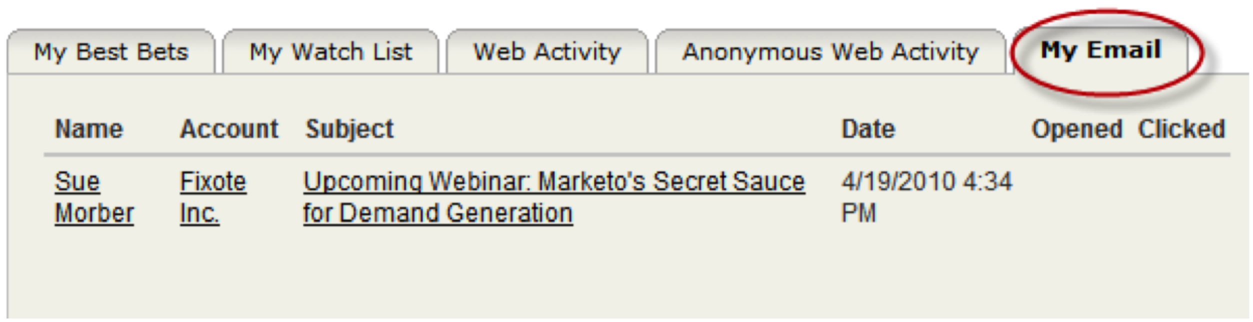
Anonymous web activity means that Marketo does not know about a specific person visiting the site. For instance, if you are working with Purina, and you see a lot of anonymous activity, you can infer that your contact’s colleagues are curious about the project.

For firms you want to target, but have stale (or no) leads, renewed activity on our site may indicate an upcoming change in vendor or people. Call anyone you know there to learn what’s going on.

Be careful: this is not perfect and you may see internet providers listed if the firm’s servers do not allow reverse DNS lookup. If you have questions, please ask Marketing.

My Email

This tab shows you all of the email you sent under your name. It can be a useful record of what you’ve already sent people or to find certain kinds of email.

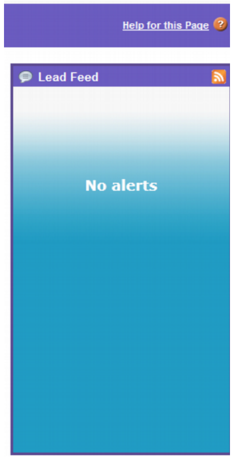


Your email history will also show you the level of engagement for types of email as well as specific Leads. If certain people are opening and clicking on your emails, that’s great! Try to replicate that across other Leads.

Avoid re-sending emails or using emails which do not seem to be opened or clicked in.

Lead Feed

The Lead Feed column on the right side of your screen is a list of recent Interesting Moments or changes to your lead. This is useful for monitoring changes to leads you own. You can Subscribe to this entire feed using RSS and attach it to Google Reader. This can be a fast way to monitor events when on the road.



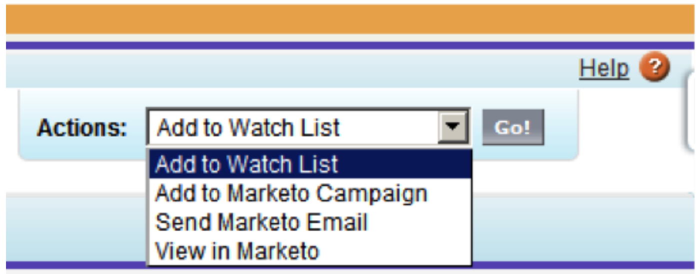
You can also subscribe to Email Alerts for a Single lead using the "Subscribe" link under the lead name. When you subscribe to email alerts, a dialog box asks you if this is the right kind of alert. Be sure to select an email address that you check.

Actions You Can Take

Sales Insight can help you take action immediately when you see what's going on.

Actions	What is this?	What it Means for Sales
Add/Remove to Watch List	Watch or un-watch this lead in your Sales Insight dashboard.	**RECOMMENDED**! Watch a key lead via RSS on the Marketo Dashboard (Marketo Tab).
Send Marketo Email	Send a personalized, marketing-provided email to this lead.	Send them a template email directly from your email address. You can modify as needed.
View in Marketo	See this lead as it appears in Marketo (read-only).	See their complete history from both SFDC and Marketo.

Actions	What is this?	What it Means for Sales
Add to Marketo Campaign	Add a Lead to a pre-set series of emails or ask Marketing to suspend emails to this person.	If Marketing has enabled it, they will tell you about pre-set nurturing emails or actions you can take.



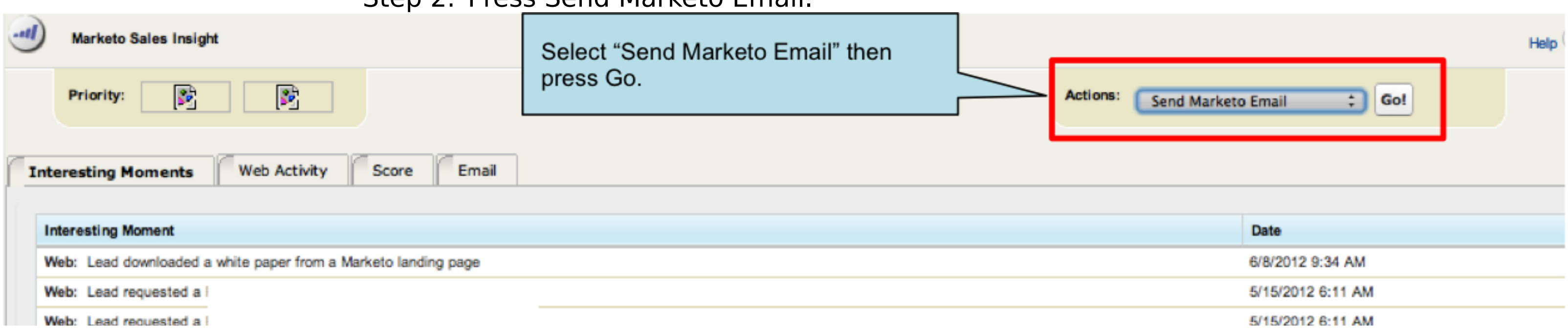
Send Marketo Email

The best way to send a single email to a Lead or Contact is via Marketo. If you send emails via Marketo, then you can track whether or not someone Opened or Clicked in the email. That way you will know if your email was successful in helping you get to the next sales stage.

It's easy to send your Lead or Contact an email directly from Salesforce.

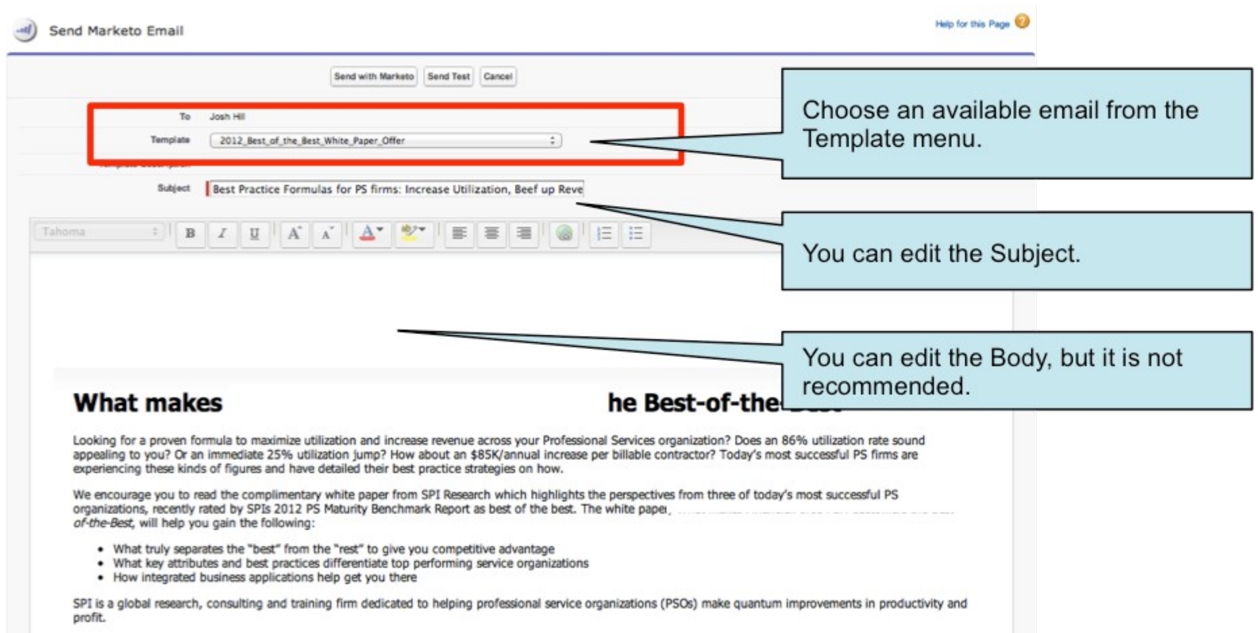
Step 1: Go to a Lead or Contact

Step 2: Press Send Marketo Email.



Step 3: Select a Template to Send

Marketing will make certain emails available to you. Feel free to edit them to create a more personal message.



Add to Watch List

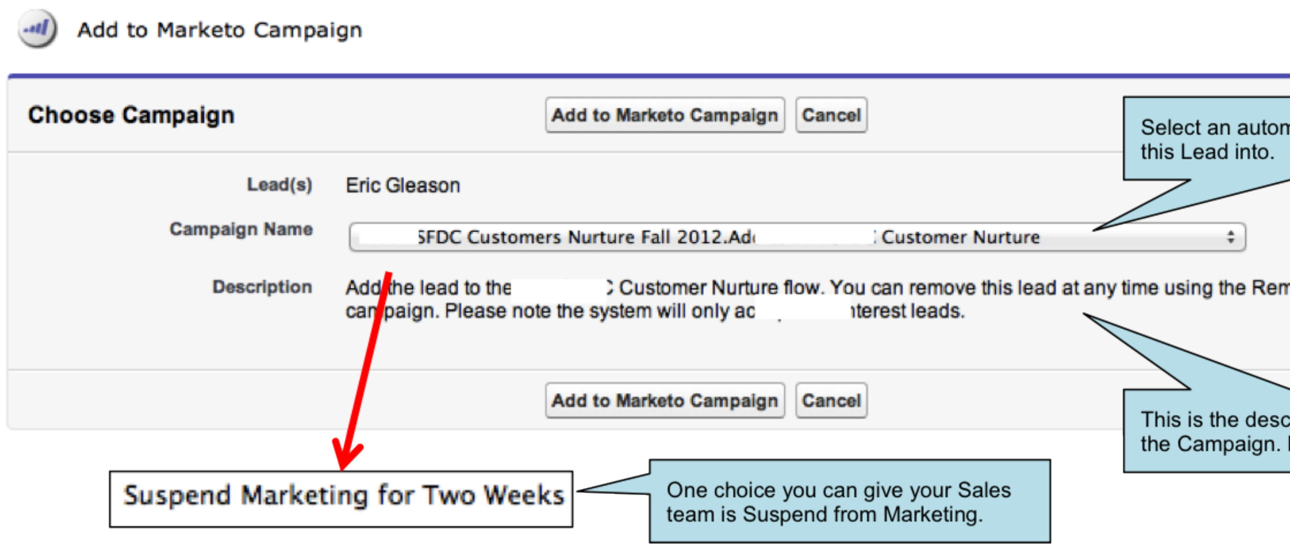
Add someone to your Watch List and it will appear in your Marketo Tab feed. The Watch List is a great way to sort and prioritize leads you want to monitor for key indicators of their buying interest.

Add to Marketo Campaign

Allows you to send this lead to an automatic program. The programs are setup by Marketing. Common programs include:

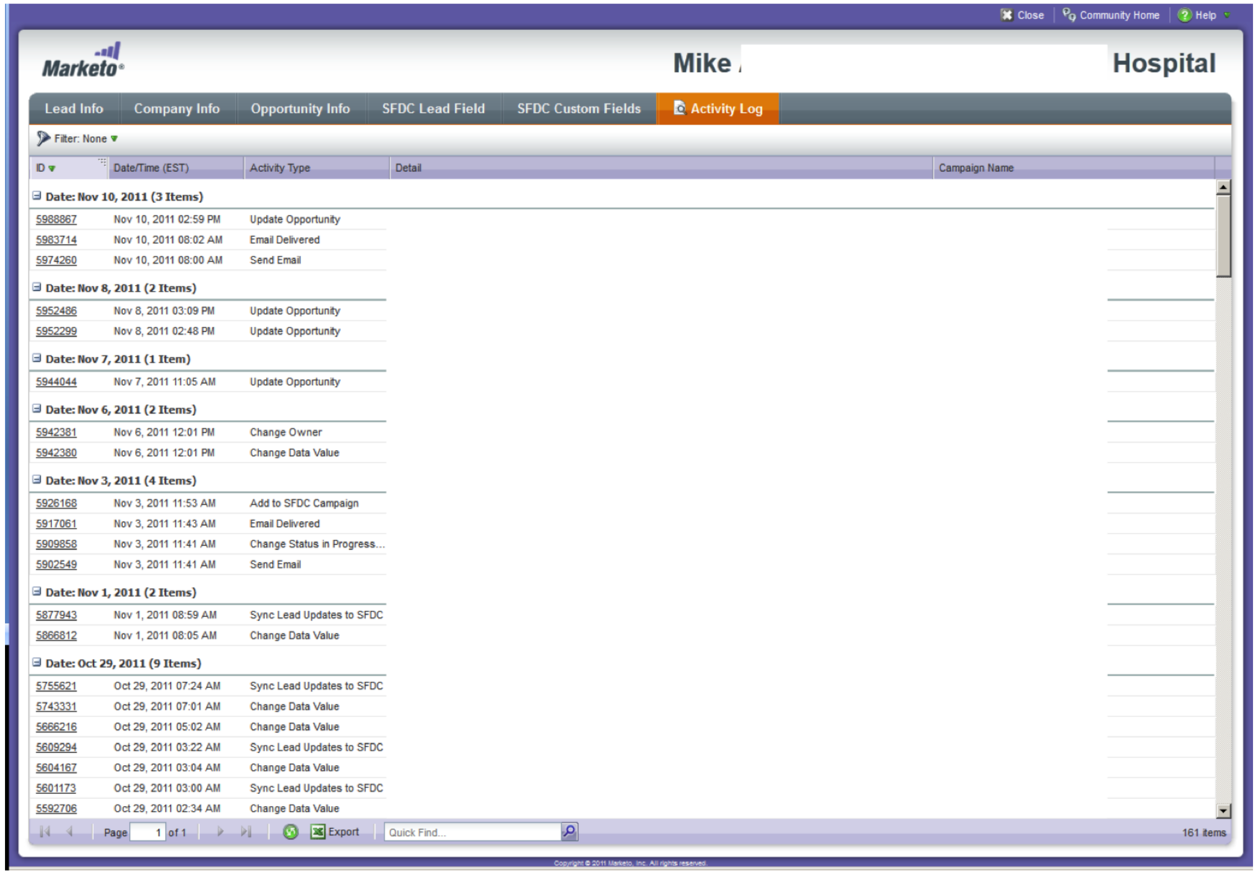
- **Marketing Suspend for 2 Weeks**: is that deal on the cusp of closing? Tell Marketing to stop sending those emails out while you handle things. It's automatic, hidden, and polite.
- **Add** to Nurturing Campaign for Product A: maybe you met the Lead at a show and want them to start receiving a series of emails about their interest in Product A.

- **Remove** from Nurturing Campaign fro Product B: tell Marketing to stop sending them Product B emails.



View in Marketo

This action shows you the Lead Detail View from Marketo – including all the juicy details from both SFDC and Marketo. (Sales Insight users can only view the details—they cannot change a record this way).



Sending Out Mass Emails

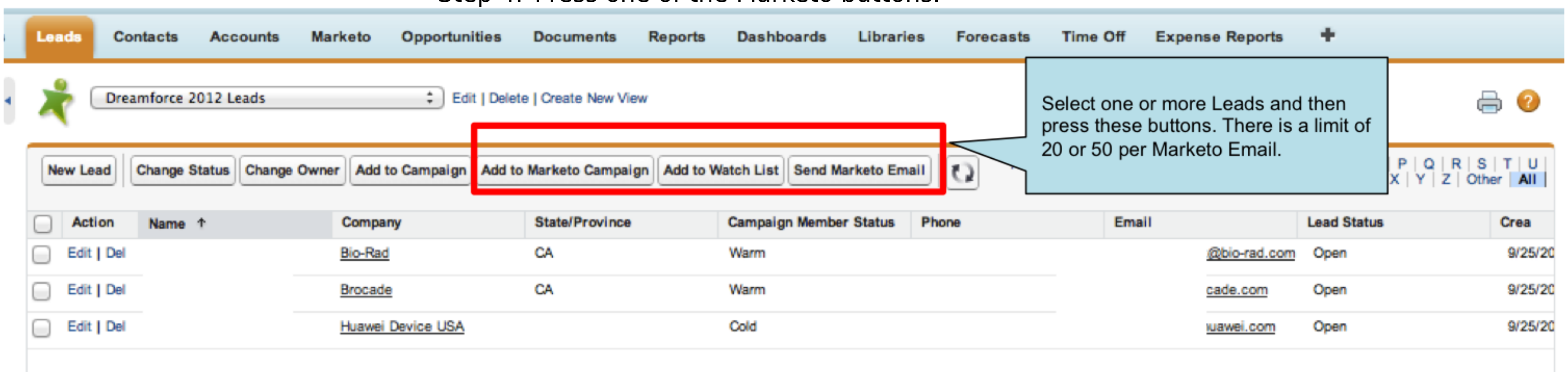
A common question is "How do I send out a great Marketo Email to a bunch of people?" The answer is easy! You can do this in a similar way to how you used to do this with Salesforce.

Step 1: In Salesforce, click on the Lead or Contact tab.
This will bring up the Lead View.

Step 2: Choose a Lead View

Step 3: Select on or more records to Send an Email to

Step 4: Press one of the Marketo buttons.



Step 5: Choose the Email or Campaign to Send
You can Send to 1 person or up to 200 (may depend on browser).

Some of the emails that will be available to you include

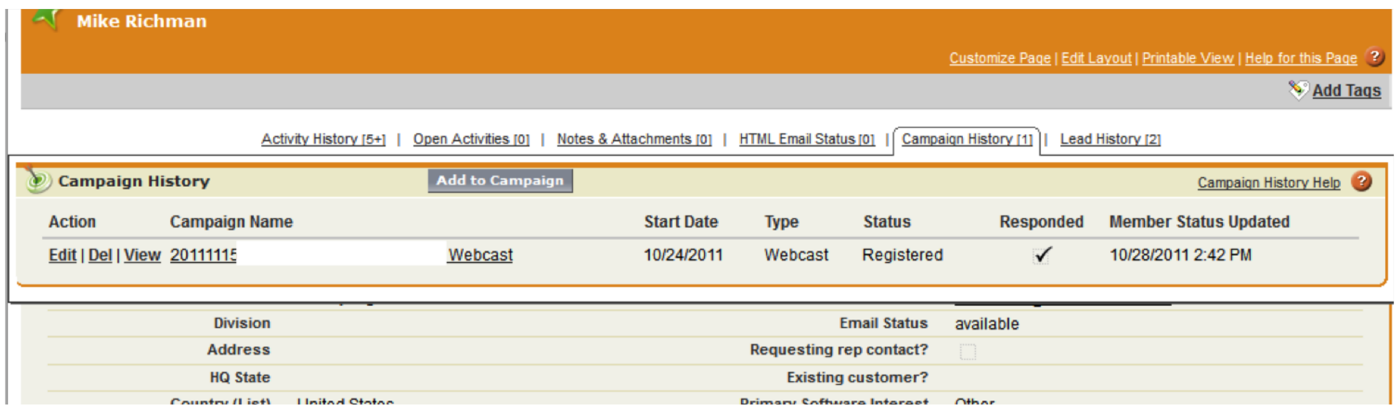
- Whitepapers
- Upcoming webinars
- On-demand webinars
- Review the campaign timelines doc
- Look for chatter updates

Other Helpful Information in Salesforce

In addition to the behavioral details that Marketo provides, similar data is also directly in Salesforce. Each Contact and Lead record can show you these details at the bottom of the page or by placing your mouse over the links at the top of the record.

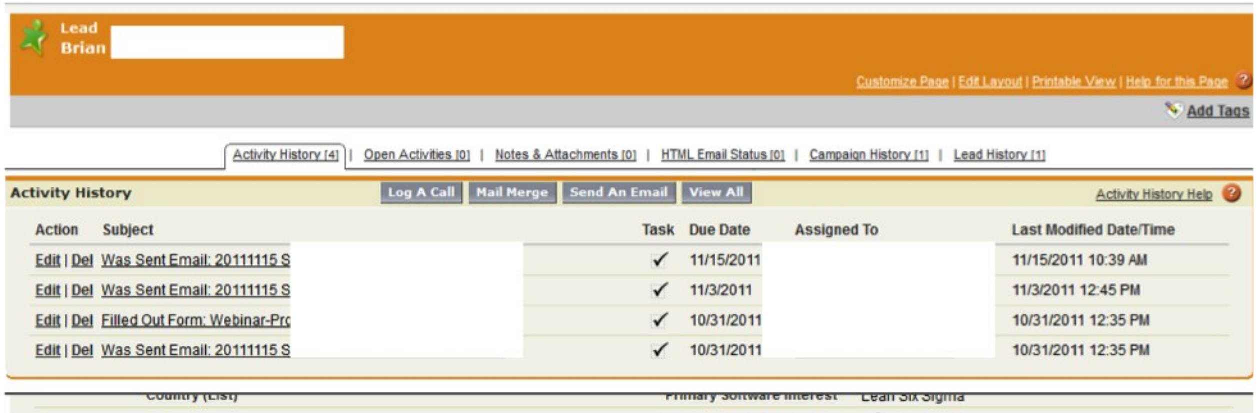
Campaign History & Member Status

This area provides details on Events, Webinars, Trade Shows, and certain email campaigns, which we use to engage our target audience. You can use this detail as part of your follow up or to know their original sources. Marketing relies heavily on this data to manage campaigns, report on successes, etc. Sales people can use it to better understand how the firm is communicating with the Lead.



Activity History

These Activities may be Meetings, Tasks, or Automatic activities. They provide insight into who has engaged the Lead previously and what other emails they may have been Sent.



Internet Sources

While more often used by Marketing and reports, the original internet details of a lead can be interesting. You can use this detail to understand what pages, web forms, or activities the Lead came in from originally. Using this detail can help you decide how to approach your call.

Lead Source

Shows the origin of the Lead: was it from a Trade Show? Roadshow? Inbound Call? Cold Call Out? This information may help Sales understand the first contact you had.

Lead Status

Where is the Lead right now? Has someone already called? Did it just come in? Is it Junk?

Original Source Info

This may tell you about the search engine used or the referring website before the lead found your firm. Sometimes Marketing will place helpful detail here about their promotions.

Original Search Phrase

If the Lead found you via a search engine, then you may be able to see the keywords they used to find you. Sometimes those keywords will be helpful in focusing the conversation to what the Lead actually wants.

Lead History

The bottom of each page contains Activity History, Open Activities, Notes, HTML Emails (from Salesforce), Campaign History, and the Lead History.

Lead History tracks specific actions taken on the Record. You can see who created it and who has moved it around. This information is occasionally useful for internal discussions.

Chapter Review

Self-Quiz

How can you let Sales drop a Lead into a nurturing program?

____

My Tokens are available inside Interesting Moment flows: T or F?

____

Sales Insight is just for the sales team: T or F?

____

Recommended Resources

Marketo Documentation Marketo

Basic Overview | Repair | Detailed Setup

Reinstall Sales Insight

Setup for Professional SFDC and Sales Insight

Configure Lead Scoring in Best Bets

Sales Insight Setup for MS Dynamics

Marketo Community Marketo

Forward to Friend Interesting Moment Tokens – not yet available.

Outlook Plugin Use

Outlook Plugin Fixes

View the Entire Interesting Moments List in SFDC

Adjusting MSI Settings will cause a recalculation of the Stars and Flames

Mass Email Using Sales Insight

Tools

Sales Insight AppExchange Package

Experts

Interesting Moments Housekeeping – Elixter

Note: some images from the Marketo Sales Insight Presentation 2010.

Chapter 15. Building and Using Forms

At a Glance

Table of Contents

Overview

Forms are a key building block to your lead generation efforts, allowing you to request your audience to provide their contact details in exchange for something. That something could be a Road Show registration, dinner at a trade show, your next webinar, an important white paper, or requesting help. The possibilities are only limited by your ability to market…and your ability to program.

Marketo provides the capability to add nearly any field from your database to a Form. The Form Designer permits all the typical form options you see elsewhere, however, it does have some limitations on the look and feel. The good news is you can customize nearly everything about the Form if you know where to look.

Since Marketo has put a great deal of effort into helping its users make the most of Forms, this chapter is best used when you have a question like "How do I make the form into two columns?" I will walk through Form basics and then answer the most common questions. For the more complex Form needs, this chapter will direct you to the right resource for you to work with your designer or programmer.

Planning Forms

Warning: changes to forms are immediate and place Landing Pages that use that form into Approved with Draft mode.

Creating a Form is a key skill in Marketo because it helps drive the `Email > Page > Form > Database` flow of collecting names and activities from Leads.

I recommend keeping your Forms in Design Studio because you should always have a set of 5 or so standard forms. While it is tempting to allow Program local Forms, these tend to cause issues when less skilled team members create Forms that are not consistent or don't bring in the right data. Because so many firms use customized forms and JavaScript, it is crucial that you restrict Form creation or heavily train your team.

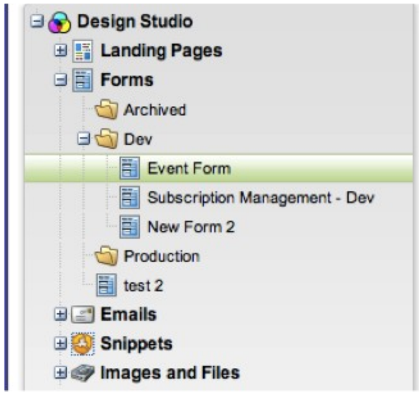
Organizing Your Forms

Now that you had a chance to try out a Form or two, take a few moments with your team to decide on 3 to 7 standard forms you will use in various situations. I recommend the following:

Form Name	Why	Level of Detail Requested
Trade Show Form	For a special trade show registration.	Medium
Standard Form	For white papers or any sign up.	Low
Standard Form Progressive	A progressive version	Progressive

Form Name	**Why**	**Level of Detail Requested**
Roadshow Registration	Event sign ups require more detail in most cases.	High / Progressive
Webinar Registration	Quick form for online events.	Low /Progressive
Newsletter Sign Up	For a newsletter or similar email sign up.	Low
Subscription Management	The enhanced and required email preferences form.	Special
Unsubscribe	Marketo's default Unsubscribe Form	Default, email.

Of course, the fields and names are up to your unique business requirements. Just remember your audience is filling these out, so treat them the way you would want to be treated in the same situation. As I discussed in Naming and Organization, it's good to keep a solid folder structure and naming scheme for Forms, especially since everyone can see them across the system.



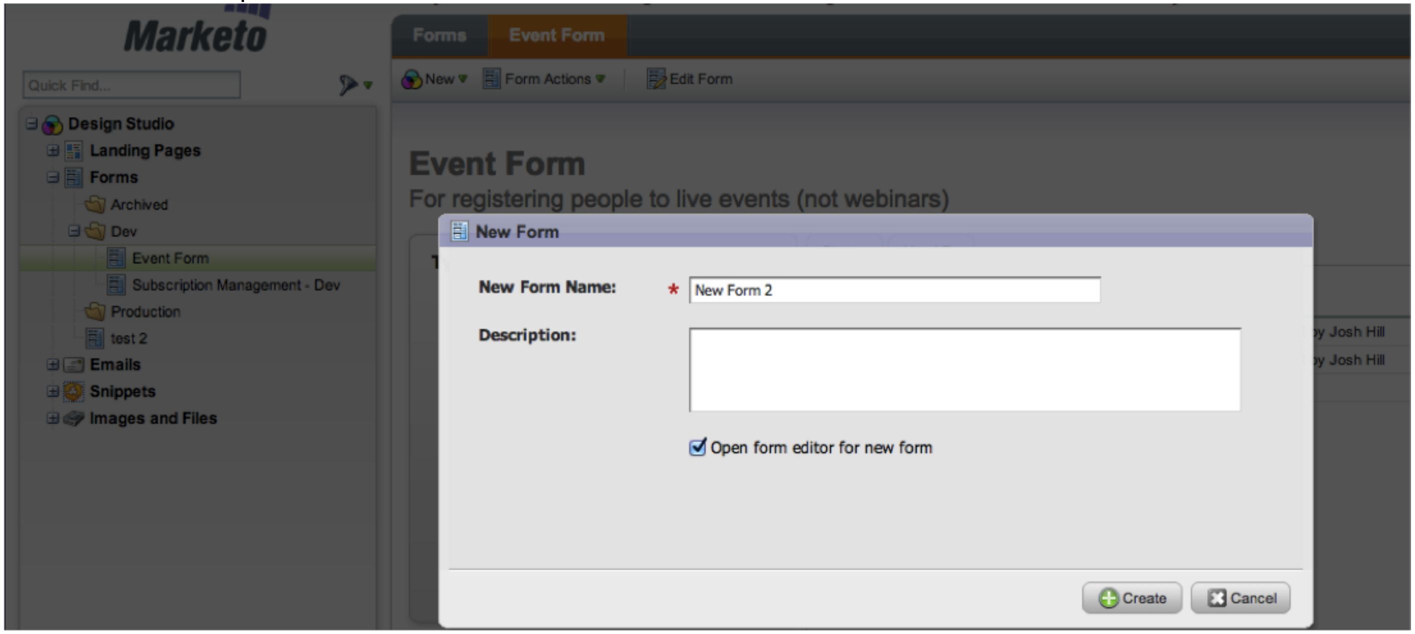
`Trade Show Event – Production`

`Webinar Registration – Dev` (not for use)

Creating a New Form

Step 1: Go to Design Studio

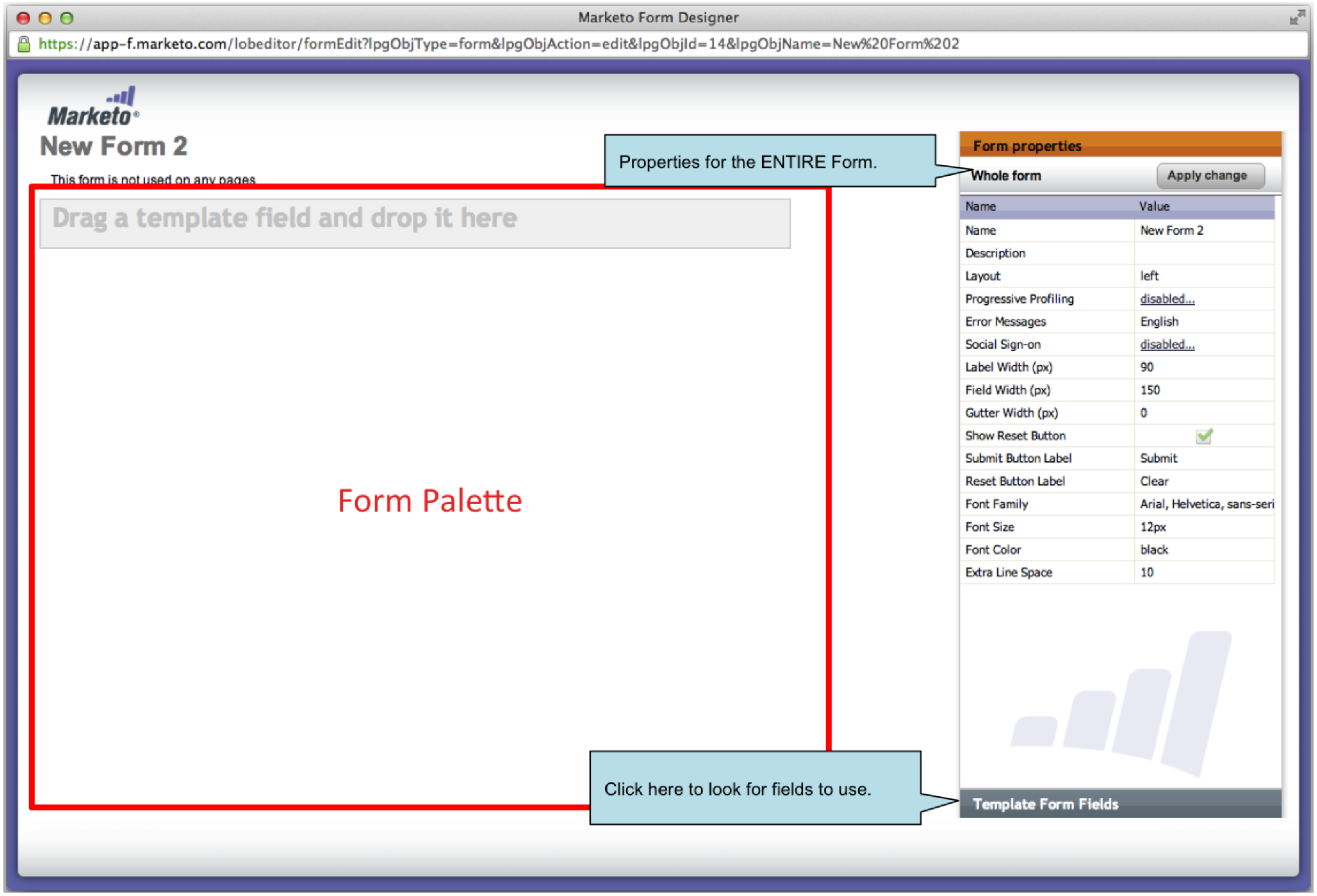
Step 2: New > Form

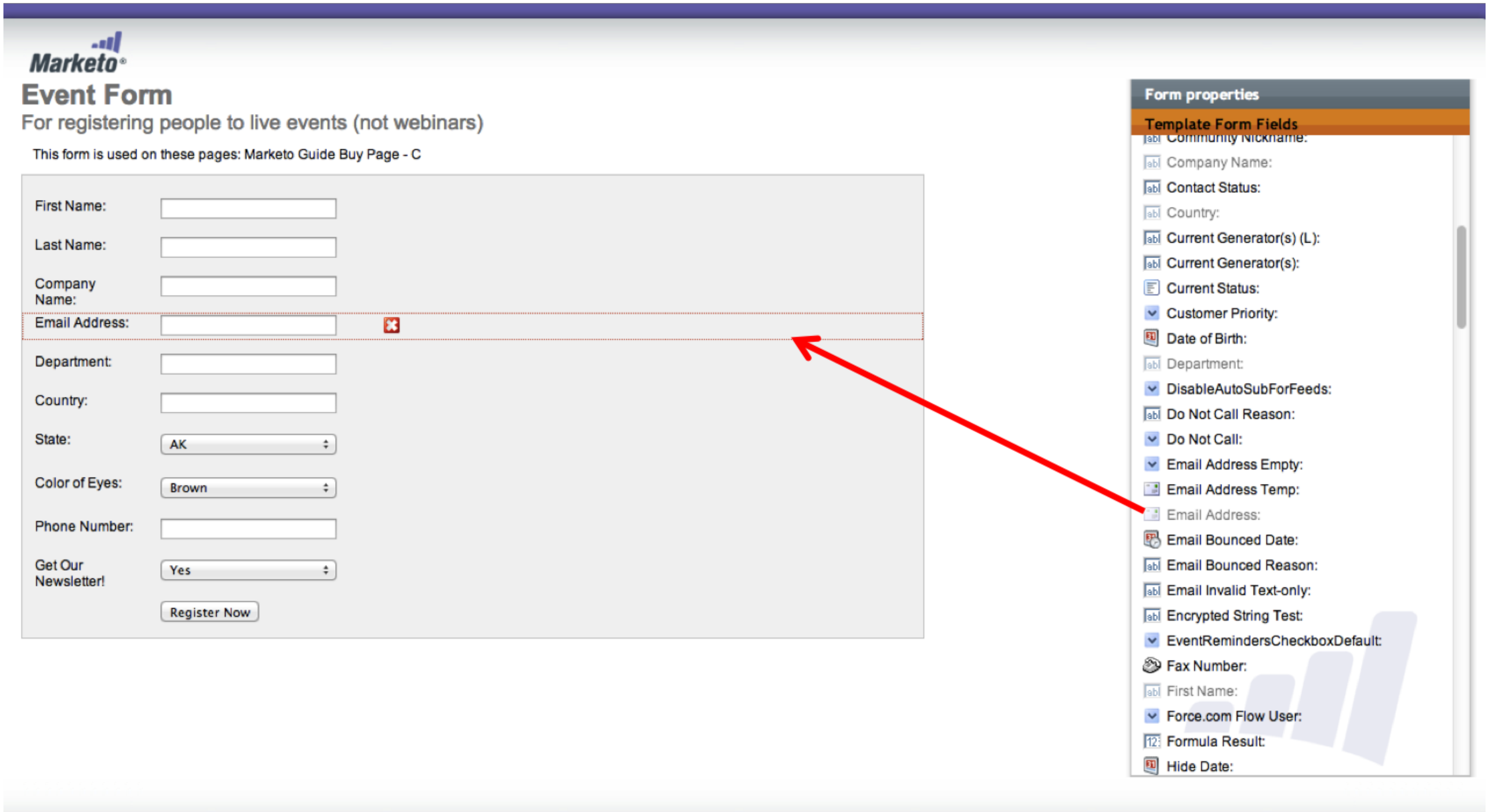


Step 3: Bring in the Fields You Want

Using the Form/Field toolbar, click on the lower right gray area "Template Form Fields" to bring up a list of the fields in your system.

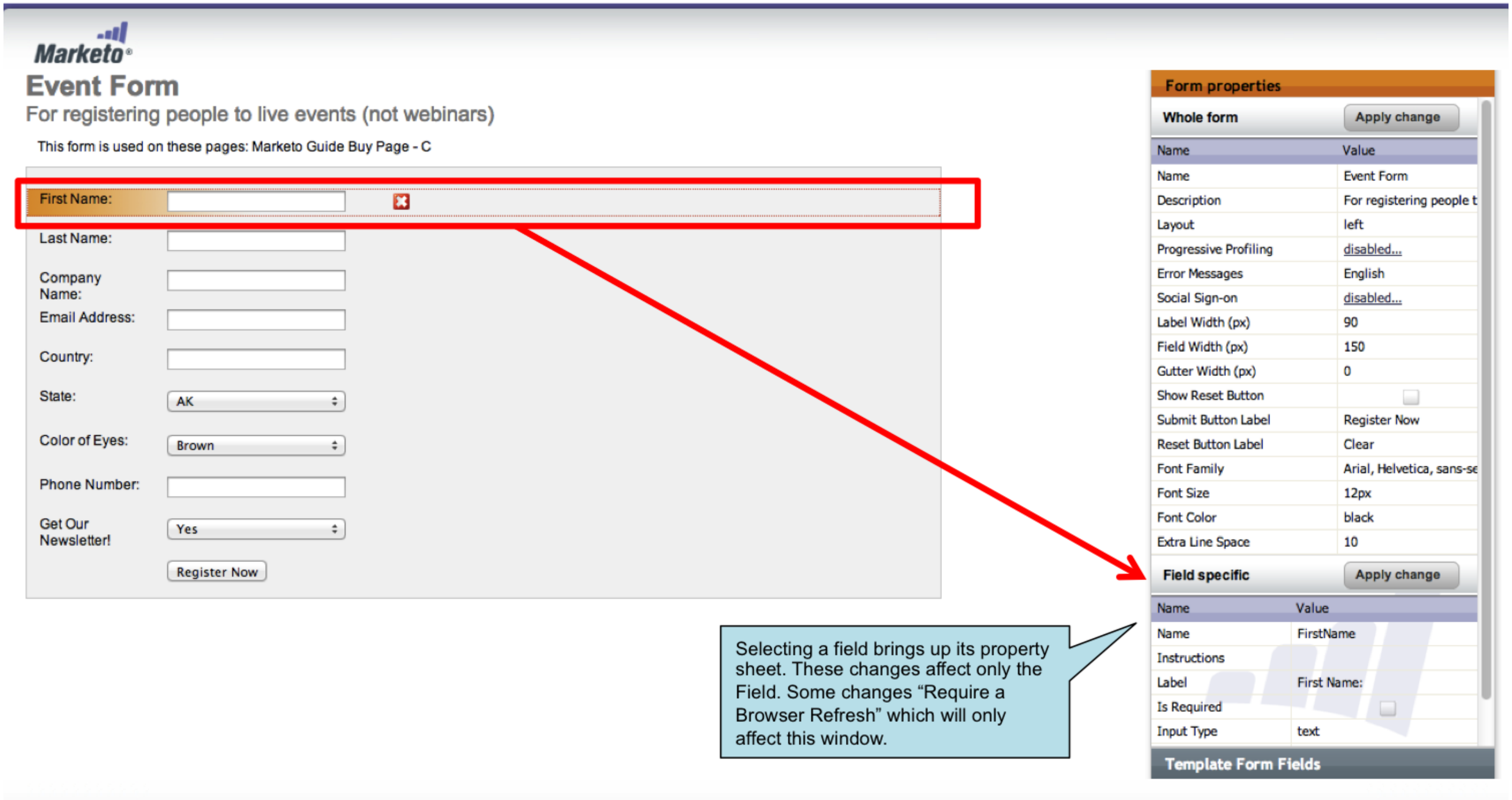
Then Drag and drop each field you want. You can adjust the look and feel of each field in a moment.


Marketo Form Designer
https://app-f.marketo.com/lobeditor/formEdit?lpgObjType=form&lpgObjAction=edit&lpgObjId=14&lpgObjName=New%20Form%202
Marketo
New Form 2
This form is not used on any pages
Drag a template field and drop it here
Form Palette
Properties for the ENTIRE Form.
Click here to look for fields to use.
Form properties
Whole form
Apply change
Name | Value
Name | New Form 2
Description
Layout | left
Progressive Profiling | disabled...
Error Messages | English
Social Sign-on | disabled...
Label Width (px) | 90
Field Width (px) | 150
Gutter Width (px) | 0
Show Reset Button
Submit Button Label | Submit
Reset Button Label | Clear
Font Family | Arial, Helvetica, sans-seri
Font Size | 12px
Font Color | black
Extra Line Space | 10
Template Form Fields


Marketo
Event Form
For registering people to live events (not webinars)
This form is used on these pages: Marketo Guide Buy Page - C
First Name:
Last Name:
Company Name:
Email Address:
Department:
Country:
State:
AK
Color of Eyes:
Brown
Phone Number:
Get Our Newsletter!
Yes
Register Now
Form properties
Template Form Fields
Company Name:
Contact Status:
Country:
Current Generator(s) (L):
Current Generator(s):
Current Status:
Customer Priority:
Date of Birth:
Department:
DisableAutoSubForFeeds:
Do Not Call Reason:
Do Not Call:
Email Address Empty:
Email Address Temp:
Email Address:
Email Bounced Date:
Email Bounced Reason:
Email Invalid Text-only:
Encrypted String Test:
EventRemindersCheckboxDefault:
Fax Number:
First Name:
Force.com Flow User:
Formula Result:
Hide Date:

Step 4: Edit the Field Settings

Once a field is in the Palette area, you can click on it to bring up the Red "X" and then the Field Specific Toolbar on the lower right.

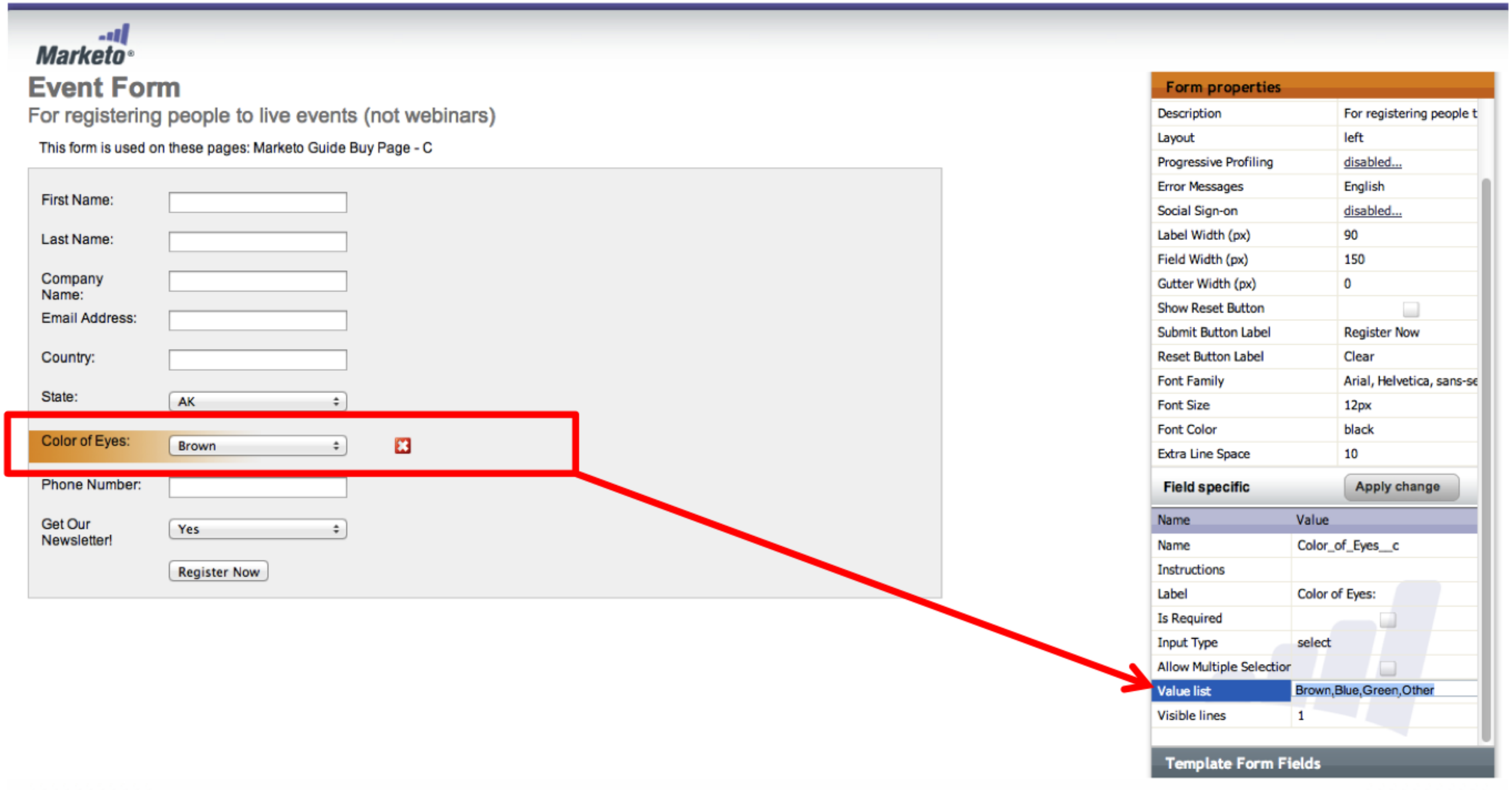


Step 5: Delete a Field

If you brought in wrong fields, press the X to delete one or more.

Step 6: Add Values to a Field

If you brought in a field which should be a picklist, you can easily adjust it. Fields like State and Country are good places to start.



Step 7: Edit the Value List

For the picklist you want, you can do a simple version, or something more complex. For instance, `Color of Eyes` is noted by

`Brown, Blue, Green, Other`

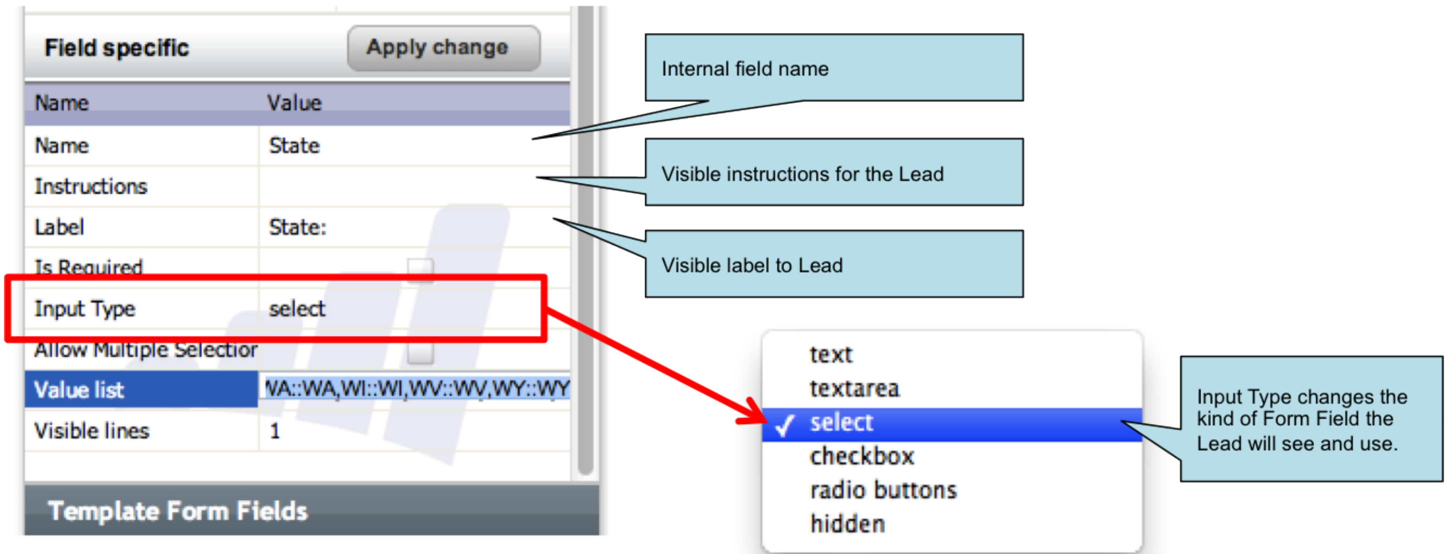
But you see how `Brown` is the first item people see? Maybe it's better to say "`Select One`" instead.

The syntax to create picklists which show a human readable value and then pass the system value is thus:

[Text to Display first]::[Text to Select From],[VARIABLE TO INSERT]::[Text to Select From],[VARIABLE TO INSERT]

```
Choose One...::NULL,Jan 10 2013 – 18:00 GMT::20130110,Jan 11 2013 –
18:00GMT::20130111,Jan 12 2013 – 18:00GMT::20130112,Jan 13 2013 –
18:00GMT::20130113
```

The highlighted values are the actual value passed to Marketo. This code example passes a date code (or any code I select) to the chosen field *regardless of its actual picklist values* in Salesforce. So be careful when choosing fields to do this with.



For showing Country Names and inserting the Country ISO Code into Marketo, you might try:

```
Select Country:,United States::US,Canada::CA,Afghanistan::AF,Aland
Islands::AX,Albania
```

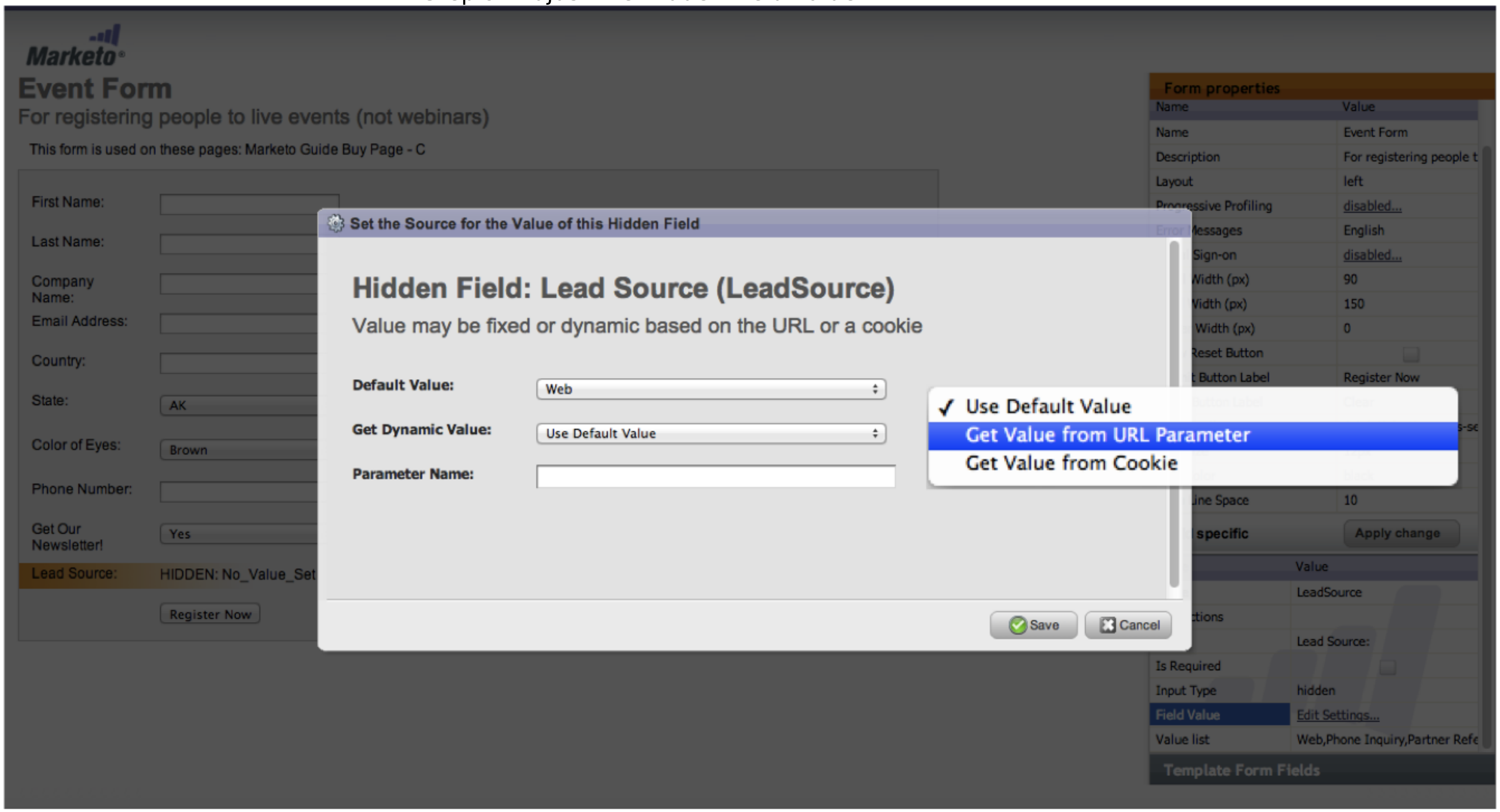
Do this in Values box, then yields this page

[State and Province Picklists](#) and [More Picklists for Marketo](#)

Step 8: Convert a Field to a Hidden Field

If you rely on hidden fields to populate Lead Source or other defined data the user won't see, then now is the time to do this by changing the `Input Type to Hidden`.

Step 9: Adjust the Hidden Field Value



Marketo can use the Default Value here, which is whatever picklist value you insert. You can also select a Cookie or URL Parameter.

I find URL Parameters useful for tracking back things like Partner Source, Referrer Pages, and Lead Source. For instance, if I want to automatically capture the Referring Sponsor Page and the Lead Source, I might do this with my URL:

```
http://my.page.com/cool-offer-page.html?ps=LinkedIn&source=Social
```

Where PS means PromoSource and Source is Lead Source. This way any Lead that comes in using that URL is automatically tagged as a Social lead from LinkedIn. Your Parameter value can be just about whatever you want. All you need to do is select `Get Value from URL Parameter` and name the Parameter as shown.

We'll go over this in a bit more detail later.

Step 10: Close the Form Page

If you are happy with the Form, you can close the window anytime. Forms are automatically saved.

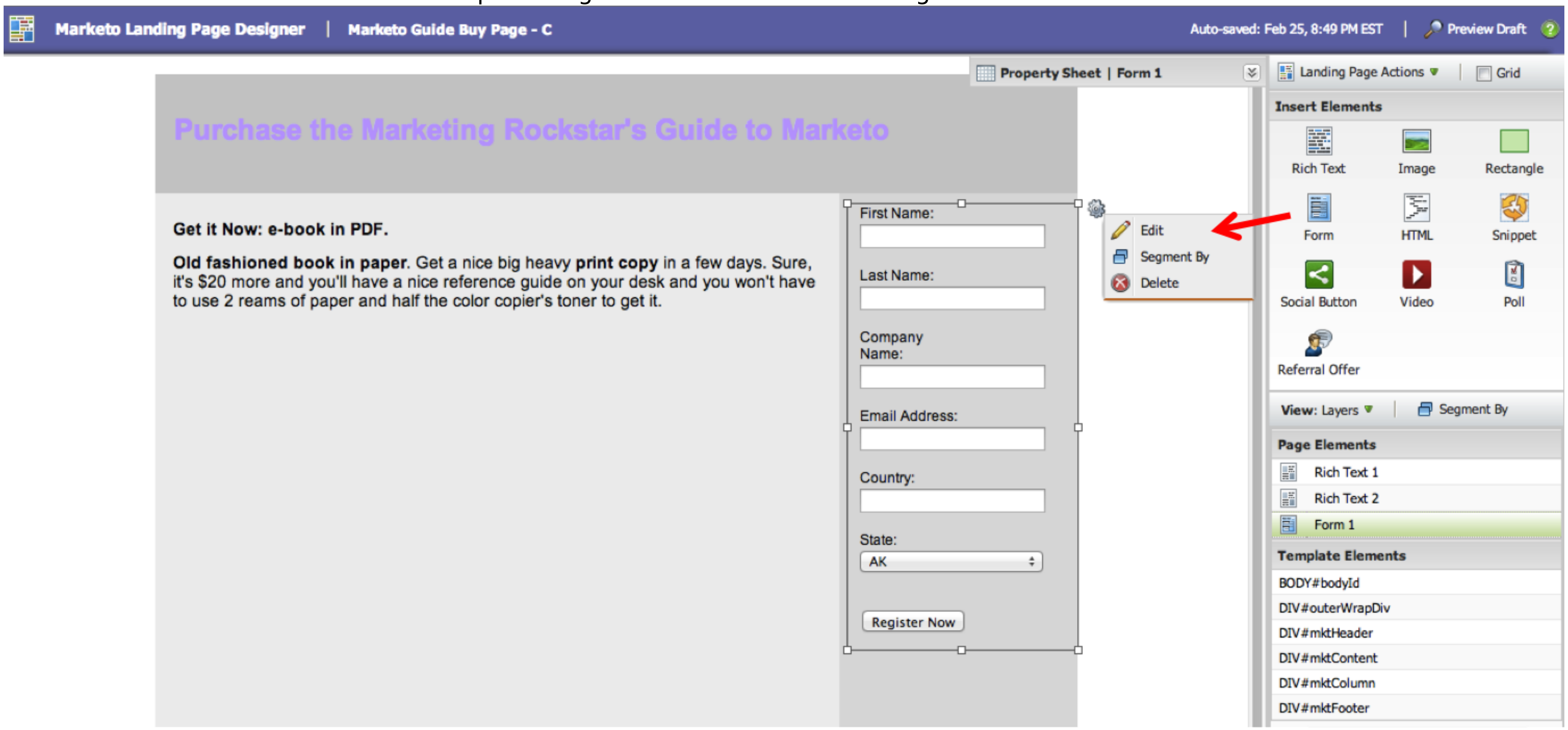
Place the Form in a Landing Page

A form is useless unless you can put it on a page a lead can see!

Step 1: Edit the Page

(or create one).

Step 2: Drag the Form Icon Onto the Page



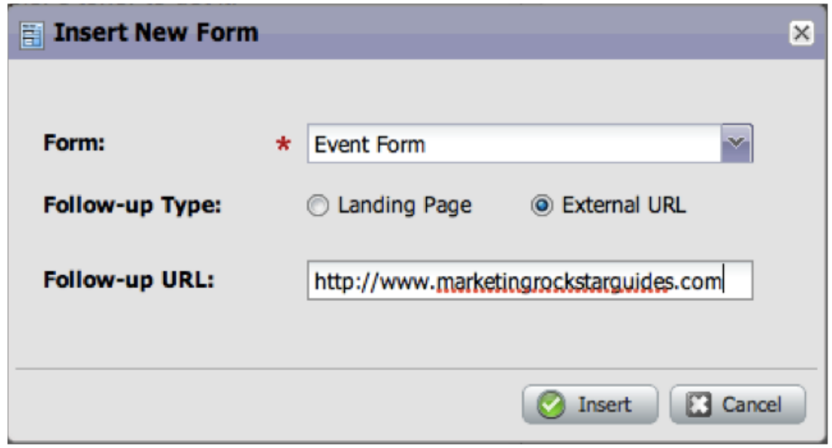
Step 3: Select the Form with your mouse.

Step 4: Press Edit

You can also [Segment By](#) if you want to show different forms to different segments.

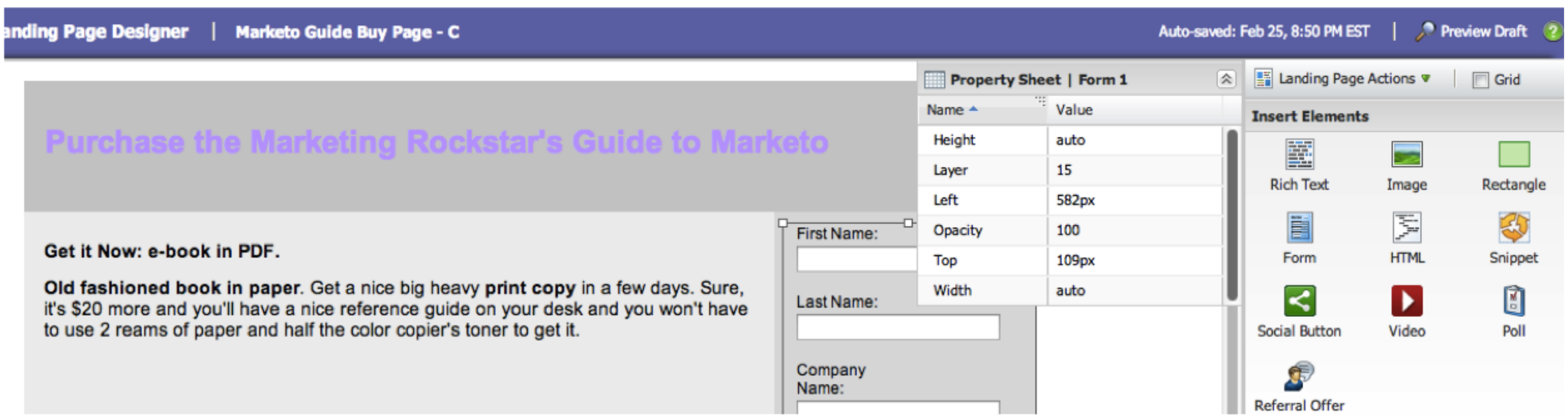
Step 5: Choose a Follow Up Page Behavior

The Form behavior dialog appears where you can switch Forms and then have the Form fill out take the lead to a Marketo Page, Stay on this Page, or go to an External URL.



Step 6: Edit the Positioning with the Property Sheet

If you need to position or size the Form more precisely, you can select the Form, then the Property Sheet tab.

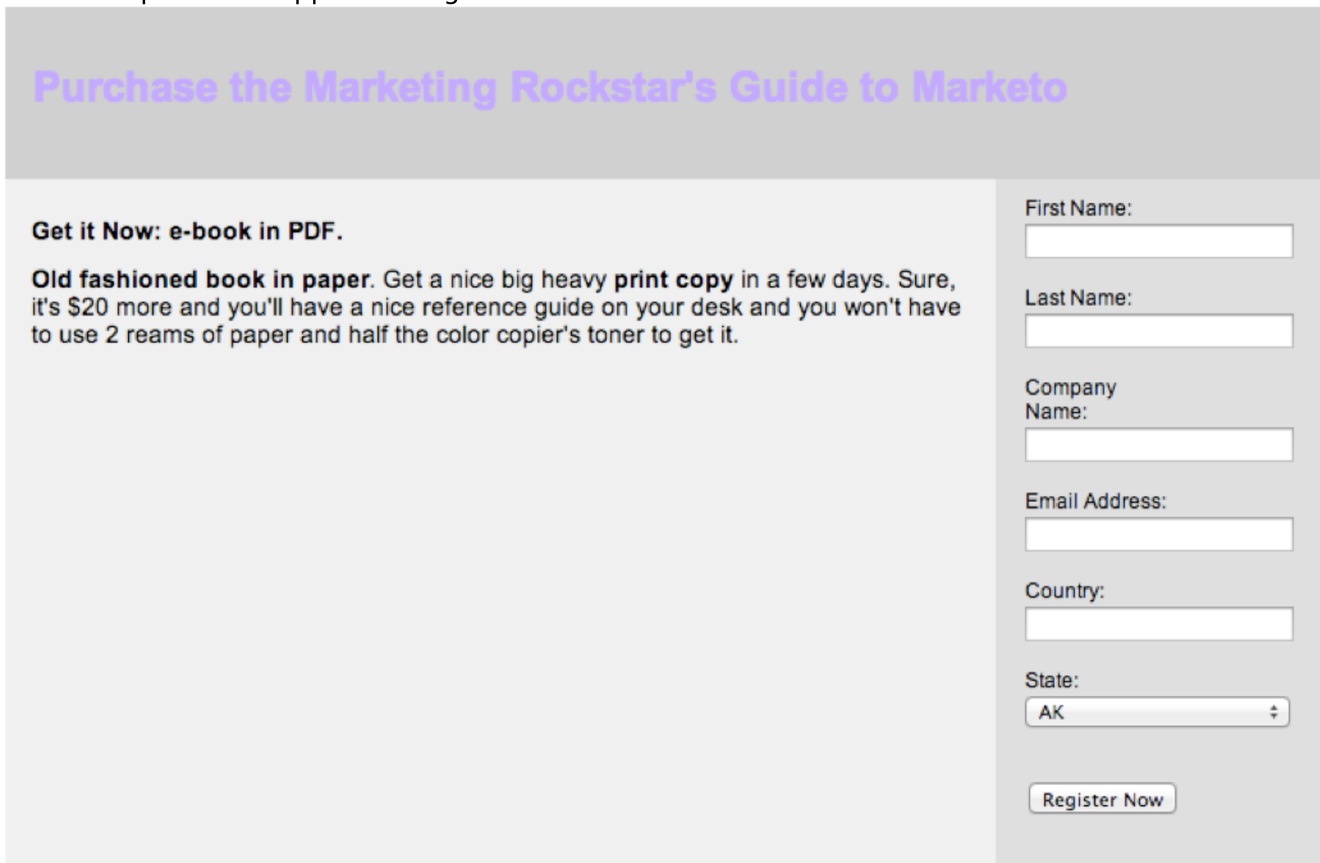


Step 7: Review the Design

You can press Preview to look at how the Page will look to the user. Personally, I prefer just Approving the Page because Preview does not always function fully.

Step 8: Approve the Page

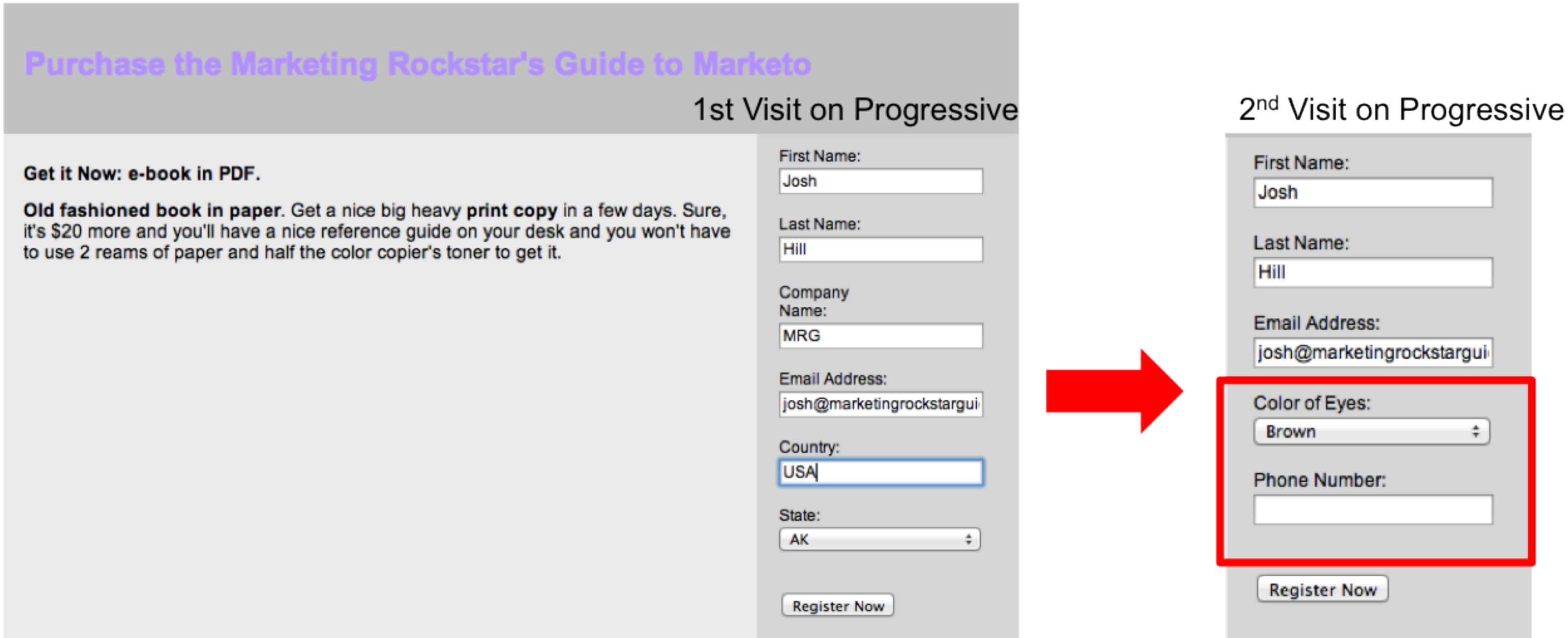
Step 9: View Approved Page



Try testing the form with a test entry!

Step 10: Test the Form Behavior

This is especially required for Progressive Forms.



Step 11: Verify the Form Provided the Data You Intended in the Lead Database

Now go to the Lead Database to search for the Lead you just created. It should be there already. Verify that the lead has the data you entered (or was updated) and if it triggered any workflows you intended.

Advanced Forms

Advanced techniques include adding Progressive profiling, customizing fields, and customizing the look of your form. At the end of this chapter you will find links to show you how to customize each item on the form.

Progressive Forms

Note: progressive forms will only show the Always Show fields and will only work in Approved mode, not Preview.

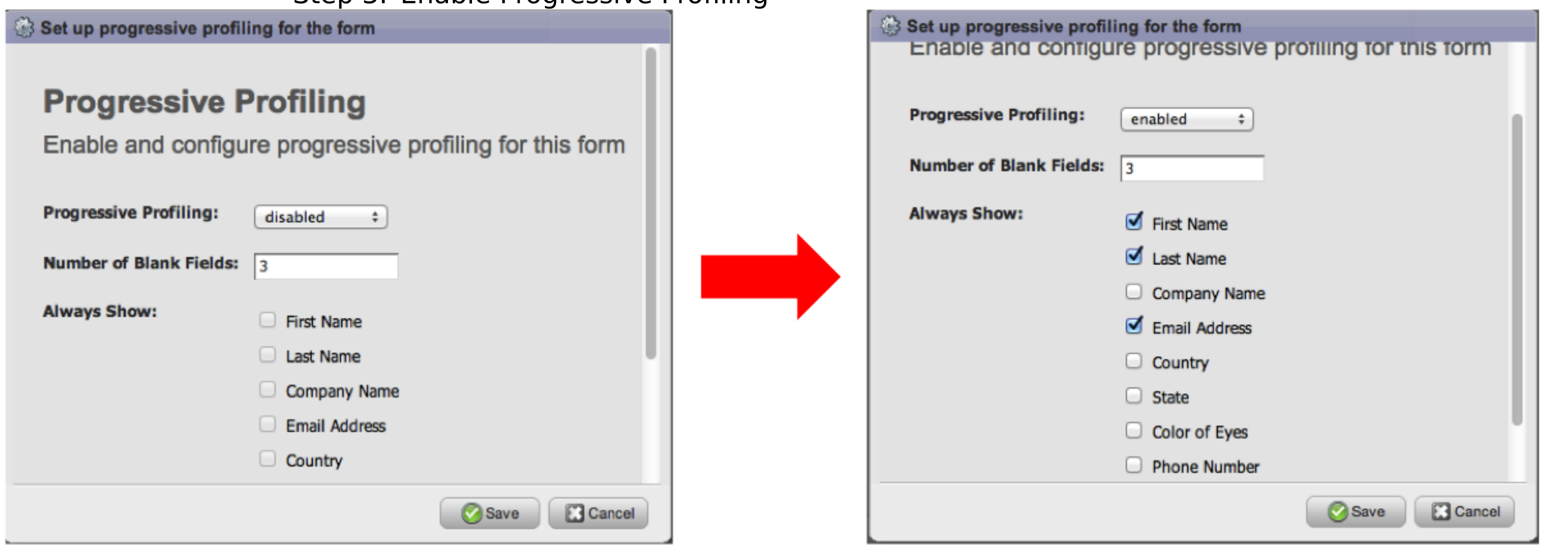
As we saw above, Progressive Profiling will bring up a lead's fields which are empty. I recommend testing Progressive Forms using a special page and a cloned Form. Do not try this on a live form that you are using for something important.

To set this up, go back into your form.

Step 1: Open the Form

Step 2: Press Progressive Profiling > Disabled in the Toolbox

Step 3: Enable Progressive Profiling



Step 4: Select the Fields to Always Show

Marketo recommends 3-4 fields to always show. Usually I show First, Last, and Email so the Lead knows it is them. Some firms will choose the next most important field like `Product Interest` or `Country` if that is a key driver of lead flow.

The current functionality of progressive profiling will randomly generate the fields on the fly. There is no way that you can set which order they appear at this time in Marketo.

You **do not need to select** any of the hidden fields, they will work either way.

Step 5: Press Save

Step 6: Adjust the Page

If this Form is on any existing Approved page, you will need to re-approve the page. Some page layouts may require JavaScript or other adjustments because a Progressive Form may start out long and end up short, or vice versa.

Special Form Situations

Handling Recurring Webinars on One Form

Keith Crosley's recurring webinar solution is ideal and I used a similar solution for a client. Right now, Marketo does not support recurring webinars, so you have to have a new webinar for each Program.

Let's say you have a regular training webinar held every week and you want a single sign up page. How do you get people to sign up for one or more without having multiple pages?

The answer is to create a Marketo only String Field where you temporarily place a "date code" in the Field Value's list:

```
Choose One...::NULL,Jan 10 2013 – 18:00 GMT::20130110,Jan 11 2013 –
18:00GMT::20130111,Jan 12 2013 – 18:00GMT::20130112,Jan 13 2013 –
18:00GMT::20130113
```

And then create a series of listen campaigns and Programs to register someone automatically. I usually recommend staying about 1 month ahead on setup of Programs and adjusting the flows. Here's a quick example:

1. Single Page, "`Main Webinar Registration Page`"
2. Single Thank You Page, "`Main Webinar Thank You Page`"
3. Single Form with a `Temporary Webinar Date Choice` field.
4. Webinar Program Template with a Registration flow that listens for a Marketo Flow Action, or does the Change Status In Progression for each Webinar Program.
5. Smart Campaign "Webinar Form Registration" which listens for the form fill out, then selects a Campaign to Request based on the Temporary Webinar Date Choice. (You can also have this campaign just do `Change Status in Progression IF Date = X, Y, or Z` for Program X, Y, or Z. This Program will then call `Webinar Date Field Reset`.
6. Smart Campaign "`Webinar Date Field Reset`" which waits about 10-15 minutes after the Form Fill Out to set the field to NULL so that the person can choose a new webinar later.

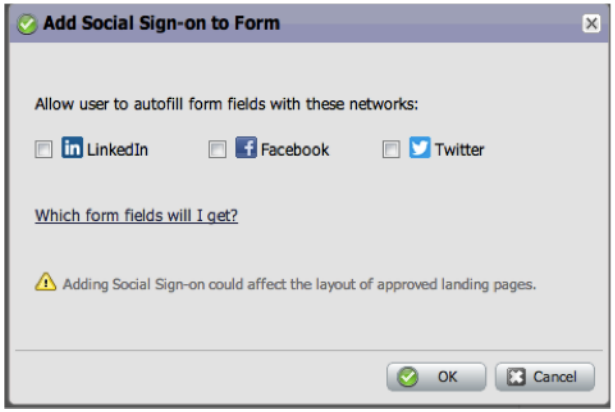
Of course, you can get a bit more complicated from here. You will probably have the actual Program handle the Confirmation Email, Reminder, and Thank Yous.

Social Sign-on

Marketo recently added social sign on where a Lead can use LinkedIn, Facebook, or Twitter to login, providing you with key details from that network automatically. This data can be fed back into your CRM instead of using another service to pull it.

- Gender
- Display Name
- Photo URL
- Profile URL
- Reach (number of connections)

To do this, you need to Enable Social Sign-on.



Hidden Fields and the Promo Source URL Parameter

If you are running a campaign with channel partners or perhaps a paid lead provider, you want to make sure to attribute each lead properly. You can try a few methods; including using fields like Lead Source, Promo Source, and other tools at your disposal.

Method 1: Multiple Pages

One way to keep your data clean is to have 1 page per channel partner or paid referrer. Each page will collect conversion data, allowing a clean audit trail. You can insert `Lead Source` and `Promo Source` fields as hidden in the Form. For instance, each form's hidden fields would be set by default to:

- Lead Source = LinkedIn
- Promo Source = GroupLinks

Limitations: you will have a lot of forms and pages. It will be hard to manage.

Method 2: Hidden Source Fields and URL Parameters

In this system we use the same two fields, but now we set them to use URL Parameters. We can generate a long list of URL combinations for each channel partner. There will be 1 page and 1 form for your Program. To report on this system, you will use a Smart List to pull Leads from this Program who meet `Lead Source` and `Promo Source` criteria from the URL Parameters.

In this method, we will add a field to SFDC or Marketo called "Promo Source".

Note you can use dashes if you like.

Step 1: Create a table mapping potential Promo Sources to Lead Source.

The purpose of this is to have a short code that can be embedded in a URL. You might consider a short three-letter code like in this example because the URL parameters can be seen in the browser address bar.

SFDC Field:

- Picklist field.
- Enter in the values you know you will use
- Be sure this appears on both Leads and Contacts.

Marketo Only Field

- Create a String field
- Add promo Source to your Form as a hidden field
- Add the picklist values you want.

Create a picklist with a Marketo String field

A simple Lead Source to Promo Source parameter map.

Channel/Source	PS=
Web PPC AdWords	PAW
Web PPC Bing	PBI
Web Direct	WDI
Live Event	LEV
Webinar	WNR
Direct Mail	DMP
Partner Referral	PRL
Customer Referral	CRL
Social-LinkedIn	SLI
Social-Facebook	SFB
Social-Twitter	STW
Social-GPlus	SGP
Rental List	RLI
Press Release	PRE

```
http://go.yoursite.com/some-page/page-name.html?PS=some-referrer&source=LEADSOURCE-NAME
```

Now you could also use something more intuitive such as "rental-list" for "Rental List". Note that the promo-source parameter should be defined in advance and the value on the URL must use a dash for spaces.

Step 2: PromoSource Individual Channel Partner Mapper

If you are running a Webinar, for instance, and you have the following sources of traffic back to your registration page:

- Invitation Email from You
- Invitation Email from Sales
- Invitation Email from Gartner (paying them)
- Invitation Email from Forrester (paying them)
- Ad on Your Google AdWords Account
- Ad on LinkedIn
- Twitter Promotion

You may want to track those more carefully because if you have to pay another firm for leads as well as see which channel is working better.

Instead, let's set the `Lead Source` field on the Form to hidden with a Default of "`Webinar`" because we are using the Webinar form.

Let's create the following Promo Source Map

Channel	Promo Source (value in URL)	Lead Source
Company Invitation	email-invite	Webinar
Sales Invitation	Sales-invite	Webinar
Gartner Email	email-gartner	Webinar
Forrester Email	email-forrester	Webinar
AdWords	ppc-adwords	Webinar
LinkedIn Ad	linkedin-ad	Webinar
LinkedIn Update	linkedin-update	Webinar
Twitter	twitter-update	Webinar

In each URL we insert into our channels, we have to use the PromoSource like this

`http://go.yoursite.com/some-page/page-name.html?PS=email-invite`

All leads will come to the same page and then the Form will pull in the value assigned to PS. `Lead Source` is set to `Webinar` at all times.

Now here's where it gets a bit tricky and it's up to you on what works well.

Step 3: PromoSource to SFDC Campaign Mapper

Kristen reminded me that sometimes tracking back the referring URLs is harder than it looks. You might consider one solution, which is to map the PromoSource back to a corresponding SFDC Campaign.

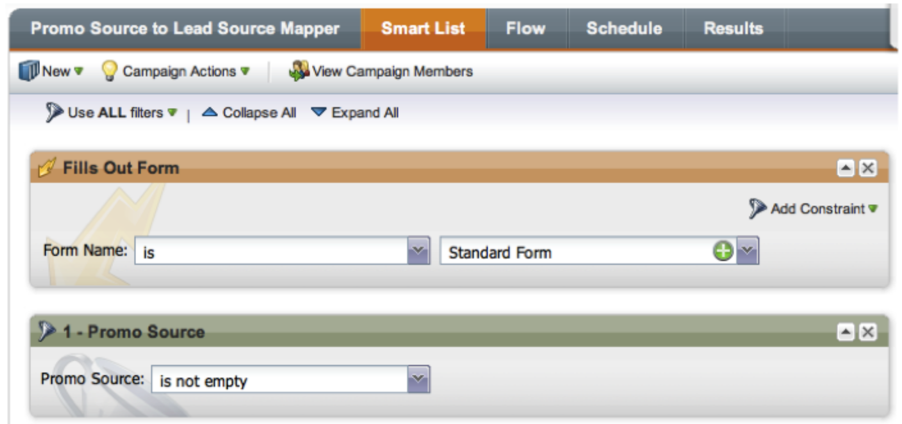
First, set a Fills Out Form Trigger to listen for a Promo Source.

You can't let `Promo Source` stay like this and assume you can report on it later. Another clicked link will surely change the Promo Source Value!

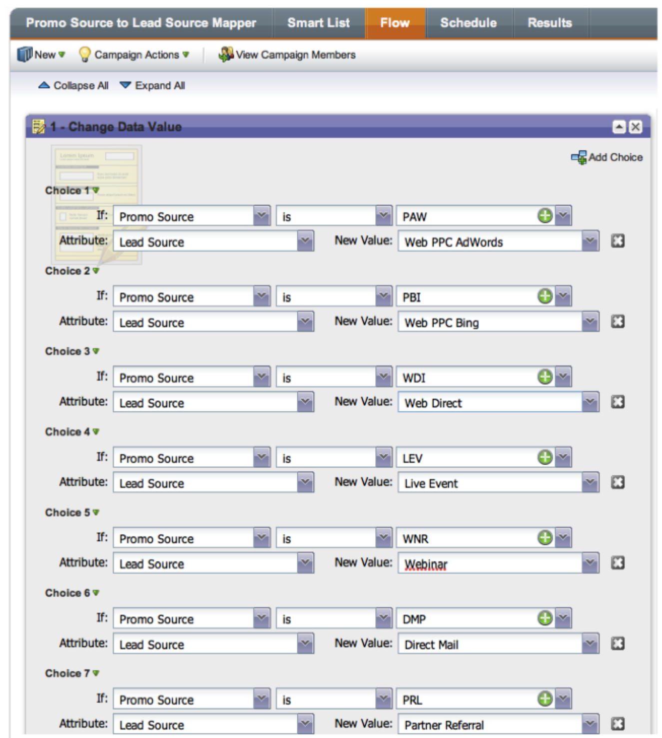
To keep a record of how this person joined us, either set an SFDC Campaign Member Status or a Progression Status in Marketo. If you are doing this as part of a Program, then that might be ok, but if you want to go further, you will need to add a step to your Registration Flow, where you say

`If Promo Source = linked-in, then Add to SFDC Campaign Promo Source LinkedIn with Member Status = Registered`.

Your separate SFDC Campaign can be a child campaign or an entirely separate campaign.



Next, setup a Flow to handle what you want. In this screenshot, I want to reassign Lead Source.



And you could easily replace this with `Add to SFDC Campaign` for each referrer option you use.

Step 4: Reset the Promo Source Field

Have a separate triggered campaign listen for a Form Fill Out to reset the Promo Source to `NULL`.

Step 5: Reporting Methods

With this method, you can try a few reporting methods:

Smart List Like

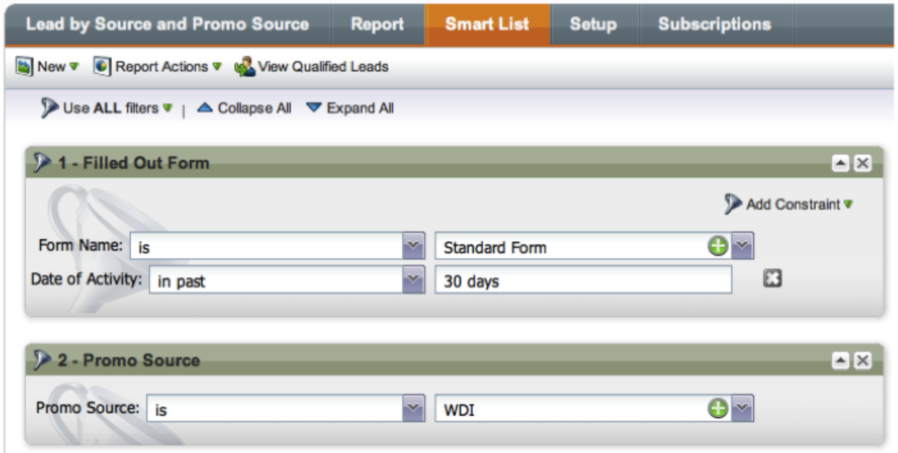
`Filled Out Form IS X`

`AND`

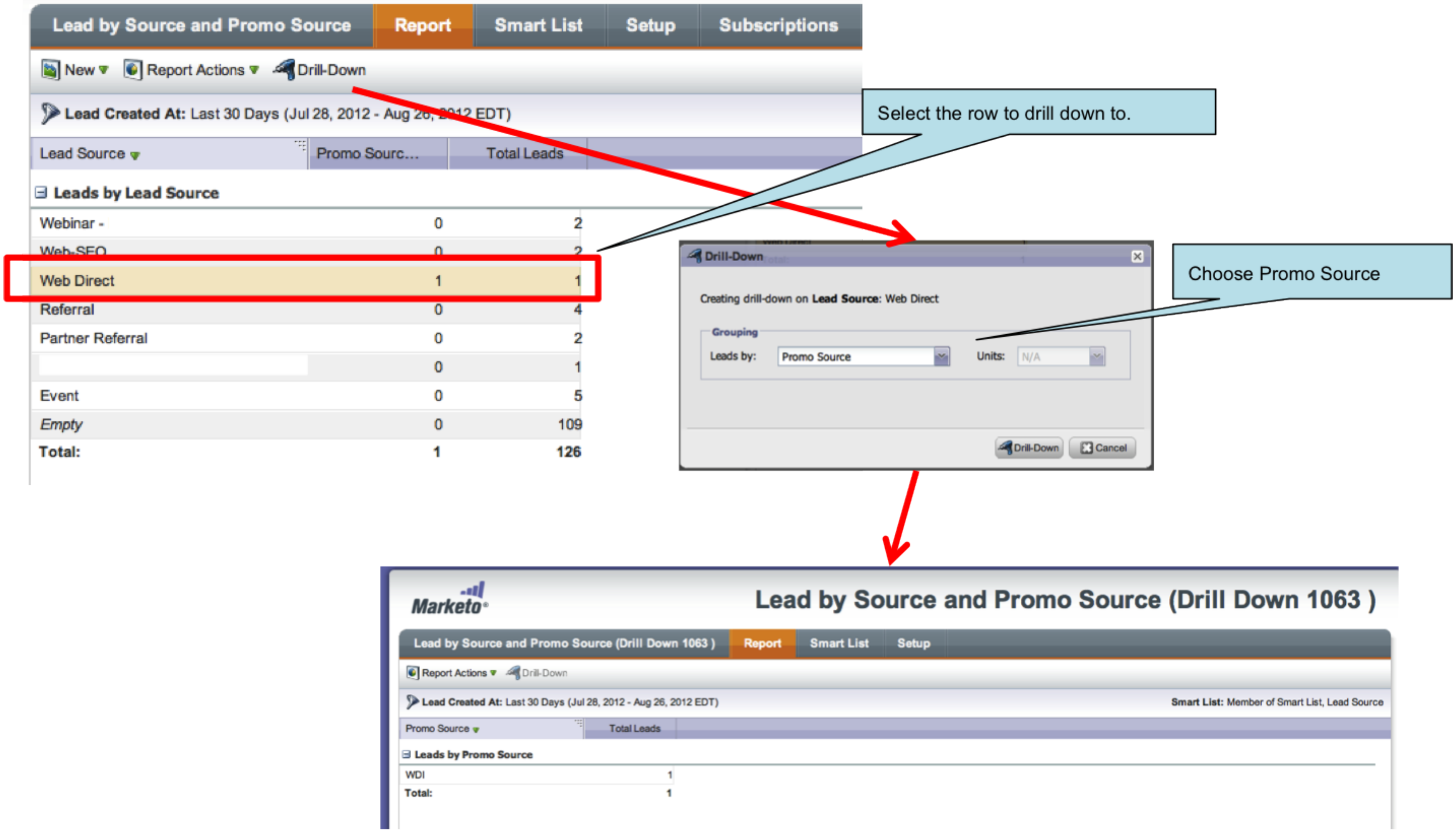
`Visited Web Page X`

`AND`

`Promo Source = X, Y, Z` (or `Clicked Link is` URL)



Lead Source Report with the Smart List similar to above. You can drill down by Promo Source or reset the Group Leads by to Promo Source instead. You could also add a Smart List Column if you pull in `Promo Source is Not Empty` as a column to show the groupings.



Customizing Forms with Lead Lizard

This case study is provided by Sam Boush, President at Lead Lizard, a provider of Marketing Automation solutions. Sam is a certified Marketo Partner and Consultant. You can reach Sam and his team at info@leadlizard.com.

Many clients come to Lead Lizard without a full understanding of the capabilities of Marketo's forms. What clients do have is a broad idea of what they'd like to achieve. (For example, having a form field "appear" when applicable, or stay "hidden" when not.) With Marketo and JavaScript, the Lead Lizard team brings these ideas to life.

There are many customized form behaviors that Marketo supports. In our experience, we have built forms with

- Create dynamic fields that "appear" when "triggering" fields are selected.
- Send leads to varying follow-up pages based on answers selected. Example: sending a lead that selects United States as their country to an English Thank-You page, while sending leads to a Japanese Thank-You page when Japan is selected.
- Change the length of individual fields on the form.
- Pre-populate fields based on lead answer. Example: When selecting Australia, the "Country Code" field populates with "+61," while selecting United Kingdom populates with "+44."
- Make checkboxes mandatory. Used in instances where you need leads to accept Terms of Agreement before continuing to next stage. Additionally, when form is submitted the date/time stamp is recorded.

Recently, Lead Lizard built critical forms for a globally recognized email-marketing provider.

Case Study 1: Geographically Dynamic Lead Capture Form

Data Capture Objectives

Capture precise geographic information. When a lead selects their home Country, specific location-based fields appear. For example, if they choose "United States" a "State" field will appear. If they select "Canada" a "Province" field will appear.

Form Requirements

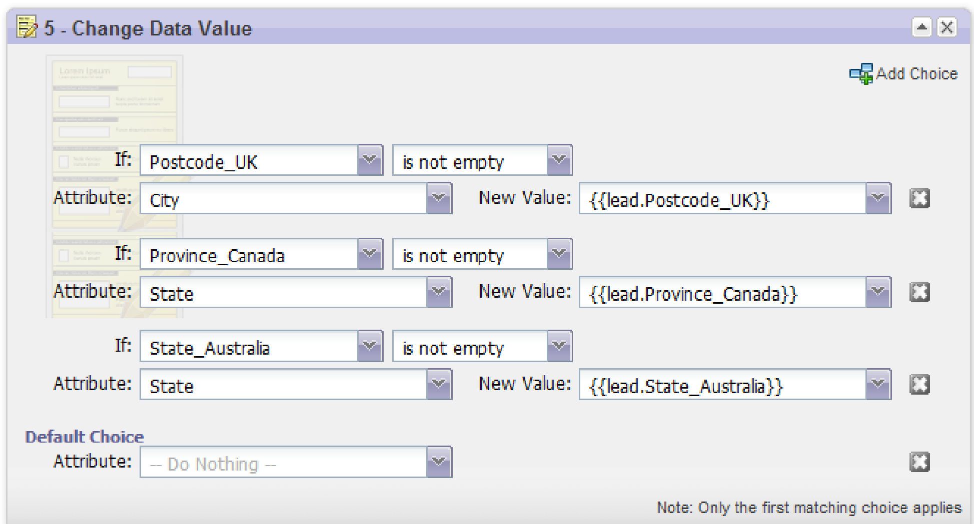
- Segment the phone number into three fields with varying lengths: Country Code, Main Phone and Extension.
- Pre-populate the Country Code field with the appropriate code, based on the lead's country.
- Format the lead's phone number into an American style format only if "United States" is selected as their country: (xxx) xxx - xxxx
- Many clients aren't aware that the "submit" button on forms can be modified. This can include changing the label name (from "submit" to "Sign Up"), moving its location, or uploading an entirely new image to replace the button.

- Forward geographic information to chosen fields. Example: When "United Kingdom" is selected as a country, its chosen Postcode is submitted as the lead's "City." However, if "Canada" is selected as the country, its province is submitted as the lead's "State." See below for an example of how we achieved this!

The three city/state fields above represent the countries our client is primarily focused on for leads (United Kingdom, Canada, and Australia, respectively). To "forward" our lead's geographical answers to specific fields of our choosing, we first created three custom fields:

`Postcode_UK`
`Province_Canada`
`State_Australia`

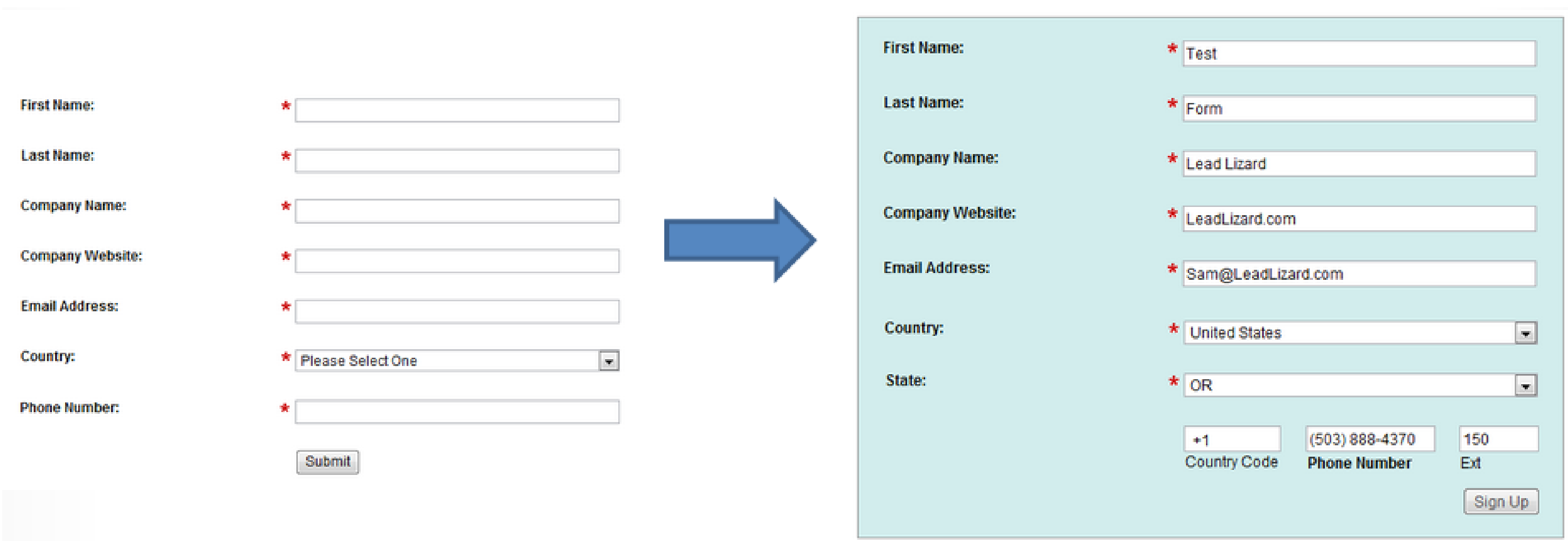
In this case, the United States' states are already sent to the correct "`State`" field for leads. Thus, we only needed Canadian Provinces and Australian States to be "sent" to the `State` field, with United Kingdom Postcodes being "sent" to the `City` field.



We achieved this by setting up the logic in the form's Smart Campaign (see above) to submit the lead's token value (representing the State/Province/Postcode) into the lead's State (or City) field.

And voila!

Here's what the Final Form looked like:



Case Study 2: Email Preference Center

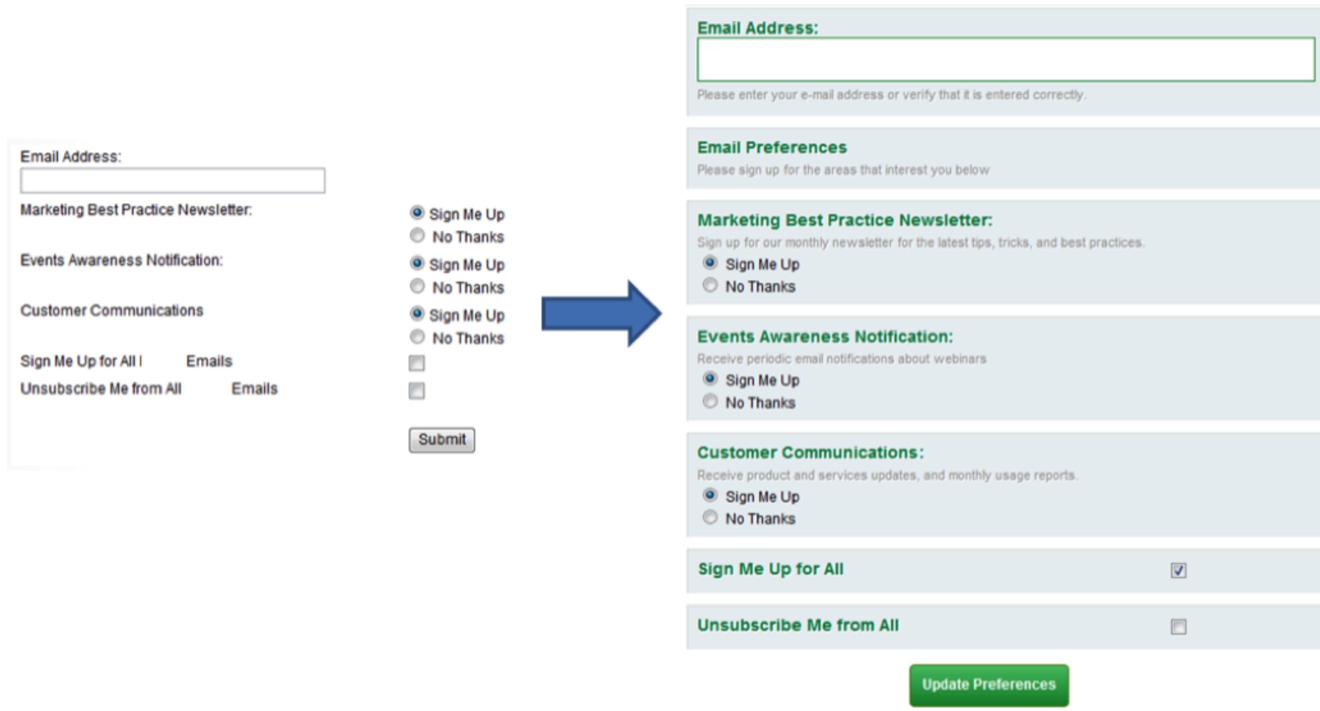
Objective

Create an email Preference Center for leads, to control which company documents they'd like to receive communications for.

Form Requirements

- Include two checkboxes, one to "`Subscribe to All`" emails and another to "`Unsubscribe to All`."
- Segment each email group into its own section, with headers and subtext with varying text font/size.
- Remove initial values on radio buttons.
- Mark all "`Yes`" radio buttons when "`Subscribe to All`" checkbox is selected.
- Mark all "`No`" radio buttons when "`Unsubscribe to All`" checkbox is selected.

What Lead Lizard Did – the Form to Page Look and Feel



As seen in the examples above, Marketo forms are incredibly versatile and can be modified to your company's precise needs and desires. As a Marketing Automation Consultancy, Lead Lizard has a team of strategists and web developers that work exclusively with Marketo and advanced form creation.

Troubleshooting Forms

Form errors do happen. The most common errors are below, including the infamous "blank lead" error.

Blank Lead Problem

After some time using Marketo pages, you may notice a ton of "blank leads" are in your database. Most won't have emails, but they all "Filled Out the Form" or did other things. Nearly all of these leads are from Spam Form Bots who crawl the web.

So what do you do with them? You can always Delete, Monitor, etc. or try one of these:

[Blank Leads]

[Client Side Spam Filter]

[Prevent Spam Bots]

[Idea and Solution]

[Invisible Captcha Idea]

I Cannot Enter Data!

There are times when you will find a form that isn't working. You just can't click on it. No one is filling it out. What did you do?

It's very simple. You placed another page element over the Form during the page editing process.

Step 1: Go back to the page in the Page Editor.

Step 2: Click over the form until you find a Box that is covering it.

Step 3: Delete this box or move it.

Step 4: Save.

Step 5: Try again.

If for some reason there is still a problem. Contact Marketo Support.

Anonymous Unsubscribes

Similar to Blank Leads, this can happen if you are using your own page; if your jQuery has an error; or if the lead somehow cleared cookies. Spam bots may also happen.

Hidden Field Value Passed Incorrectly

This may happen if you set a Default Value when you intended the URL parameter to provide the value.

Solution: Remove the picklist for that field and leave Default Value Blank for the hidden field.

Form Stays on Page

This is likely because you did not set a follow up page for the form or `Stay on Page` may be selected. If the Lead presses the Submit button, the data will be sent to Marketo properly. If you want a page change for any reason, please try the following steps:

Step 1: Edit the Page.

Step 2: Select the Form

Step 3: Press Edit

Step 4: Adjust the Follow Up Page

Lead Was Not Captured by Program, Campaign, etc

Likely caused by a Trigger or Smart List error. Possible solutions include:

- Too many filters – this often happens to me.
- Using WAS NOT instead of NOT WAS filter types.
- Possible missing flow step like `Progression Status.`
- Check your lead to see if it met the Trigger criteria.
- Check Member lists for the lead.
- Review Smart List and Flows—remember webinar registrants must have Progression changed to Registered using a Flow step.

Lead Data is Missing in Marketo

Possibly caused when submitting from a non Marketo page.

Solutions Check your field blocking and source for those leads. If that doesn'tw ork, troubleshoot with your designer or Support.

Marketo Designer Will Not Allow Me to Add a Form

Usually caused by missing Marketo Landing Page Template code. That code is critical for Marketo to function properly, so make sure it is in there.

Solution: Create a new template to obtain the current page code. You or your developer should then add in the missing code to your other template.

Recommended Resources

Marketo Documentation

Form Basics

Forms Instructions Home

Basic Form Setup

Progressive Form Setup

More Progressive Form Setup

Advanced Form Setup

Hidden Fields and passing parameter values

Embed a Marketo Form on a Non Marketo Page

Changing the Look and Feel

Changing the Form Behavior

Country and State Vale Lists in ISO [MRG]

Validating Form Data

Validate Phone Numbers – just like Sam did in the Case Study.

Client Side Validation – [code] will not work with javascript set to off!

Block Personal Emails List [MRG] (Marketo's Lead Scoring Program now has a similar list).

SOAP API and Javascript

SOAP API

Jscript API

Marketo Community Marketo

Embedding Forms on Non Marketo Pages

Discussion on Embedding Forms

LinkedIn Discussion

Forms and Other CMS Tools

Non iFrame Example

More iFrame Examples

Form in a lightbox

Handling Multiple Webinars on a Single Page

SOAP API, Javascript, and Tricks from Eric Hollebone

Munchkin Event Tracking

Marketo SOAP API Get Lead with Ajax

Increasing Lead Conversion with Session Counting

Double Submitting to Marketo and another Database

GeoIP Lookup Using Forms

Convert a Marketo Form Multi-select box to Checkboxes

Marketo Form Tips

Other Discussions

Reset the Field After a Form Submit – in case you are using a temporary field for data storage

Resetting the Field After a Form Submit 2 –

Just update the Change Value=NULL with listen campaign.

Marketo Only Picklist

Using a Comments Field instead of the Description Field

Using Hidden Fields

Making a Form look like it disappeared after submit instead of going to a different page

Making a "Kiosk" form for Contests or Sales Data Entry

Tools

Form Size Calculator by Eric Hollebone

Experts

Sam Boush, Lead Lizard

Eric Hollebone

Chapter 16. How to AB Test Landing Pages

At a Glance

Overview

Marketers are now expected to test web pages as a matter of course. Testing pages, however, often requires special configuration of websites to properly handle rotation and tracking of options. One of the reasons you selected Marketo is the system natively handles landing page testing using a feature called Testing Group.

Unlike Marketo emails, AB testing is native to the landing page system. You can create Test Groups in Design Studio or in a Program.

What I talk about when I talk about AB testing

In case you skipped the section on Email AB Testing, here's an overview. Feel free to skip this section and move on to the juicy core of getting it done in Marketo.

While I hear much talk about performing AB testing by marketers, not as many of us are doing these tests back at the office. Let's change that right now, with this chapter. First, let's review what AB testing is.

AB Testing of Landing Pages:

1. The comparison of two or more pages that are randomly shown to visitors with the goal of discovering which page has more conversions (form fill outs or purchases).
2. The system designed to build, attract, and report on emails and pages.

In a complete testing system, you can AB test the email, the page, and the thank you page. Some marketers recommend an additional offer on the final page. The best follow up offers tend to be a demo or additional content sign ups, but could also be upsells for other products.

Just so we are on the same page, here are three complete emails to thank you page workflows to help you visualize what we will build in this chapter. Earlier, we learned how to setup Emails for AB testing, so now we can test just the email as in Figure 1.

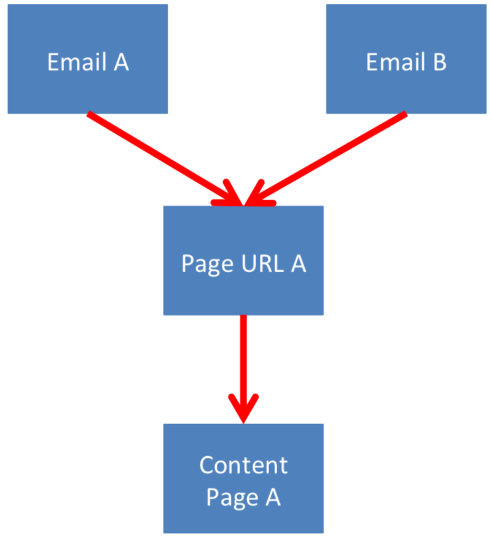


Figure 1. An Email AB Test to a Single Page Offer

If desired, we can also test the Landing Page using a new concept: the **Marketo Landing Page Test Group**. Both emails will use the same URL, but Marketo will randomly show one page or the other regardless of which email was received.

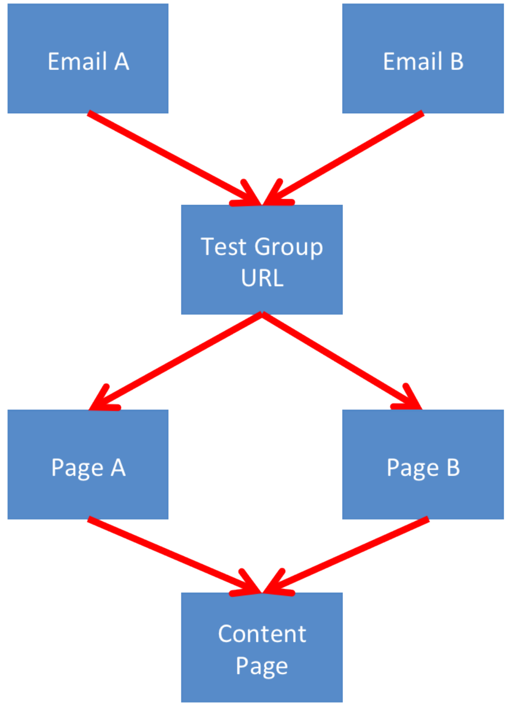


Figure 2. Email AB Test to a Single URL with an AB Landing Page Test.

Finally we can test all three content pieces: Email, Landing Page, and Follow Up page to see which one was better in comparison. This is a complex report and requires a larger sample size to ensure statistical significance. You may want to compare groups of leads rather than the emails in this situation, so replace "Email A" with "Group A" and "Group B" and send both groups the same email.

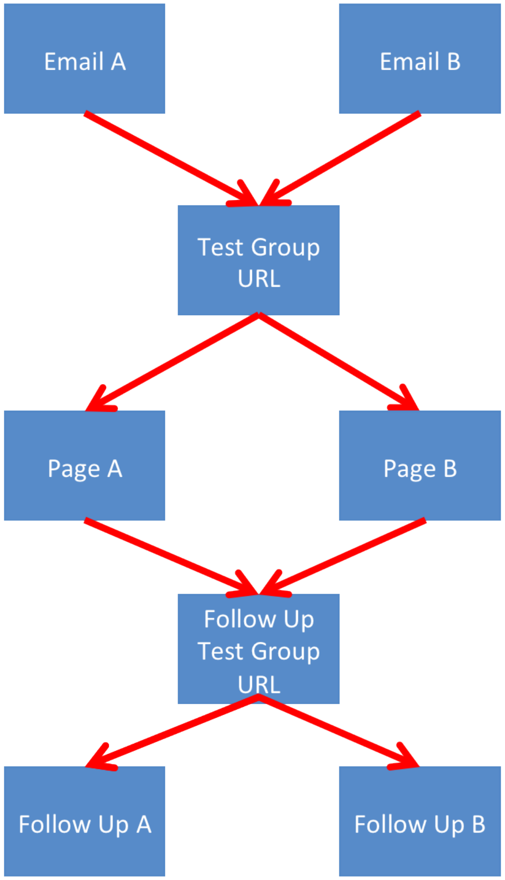


Figure 3. Email AB Test against a single Page URL with an AB Test and a Thank You Page AB Test.

Like Email AB testing, landing page testing can become highly complex if you try too much at one time. Since there are so many other resources out there, I will focus on how to setup the test inside Marketo for a single AB Page Test.

Key AB Testing Concepts

Part of AB Testing is to get the setup right so your test is statistically valid. We covered much of the details in the Email AB Test Chapter, so here's a quick overview.

Test the Null Hypothesis, which is always that there is no difference between Conversion rate for the Control (A) and the Experiment (B).

A: Control: this is the original page. You may already have data on it too.

B: Experiment or Test: this is the new design with a single change to make it different than the Control. For a landing page, you will want to clone a first, and then make a single change on B.

Which Parts of a Page Should I Test?

To test a page properly, you can only make one change on the B page. Here are a few suggestions.

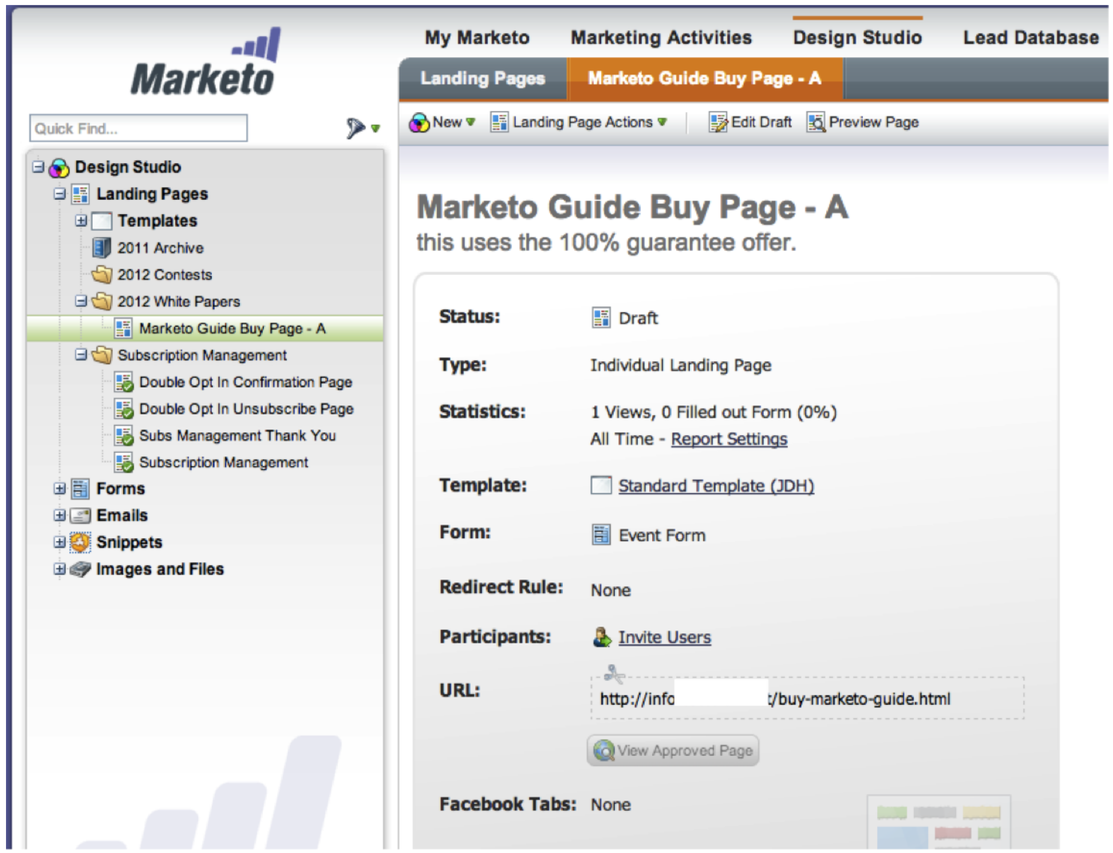
What to Test Landing Page Attributes	Random Samples of a Single Group who come to the Page URL
Headline	The big headline that says it all, or should.
Bullets vs. Paragraphs	Bulleted lists or real text paragraphs?
Form Length	Progressive or Fixed? Number of fields or which fields? Choose wisely.
Salutation Personalization Types (PURLs)	You can personalize and use dynamic content. More on this later.
Offer	What is your offer? White Paper? Free Trial?
Sub-headline	Sometimes a sub-header is useful above the Form or below the Headline.
Photos	For events, photos of speakers with names, titles, and bios can help.
New vs. Old Design	Thinking of a new design, but not sure? Let your audience decide for you.
Fonts	Sometimes fonts do matter. If you do use multiple fonts on a page, change one of them at a time.
CTA Copy	What is the CTA on the Submit Button? Can also have a CTA above the Form.
CTA Color or Size	Button color does make a difference. So do size of other CTAs
CTA Placement	The placement of a text CTA can help or hurt. Usually this goes above the Form.
Bios of People	Add bios or remove them.
Length of Text	Is your page wordy? The long sales letter does work in many situations.

How to AB Test Landing Pages in Marketo

Ok, let's get to it! In this example, I will test Page A against Page B with one difference: Page B will **not** have a 100% guarantee offer. I want to see if people will buy my Marketo Guide with or without a 100% money back guarantee. May the best page win!

Step 1: Create a Page

You need an existing page or create a new page. Let's call this one `Marketo Guide Buy Page – A`.

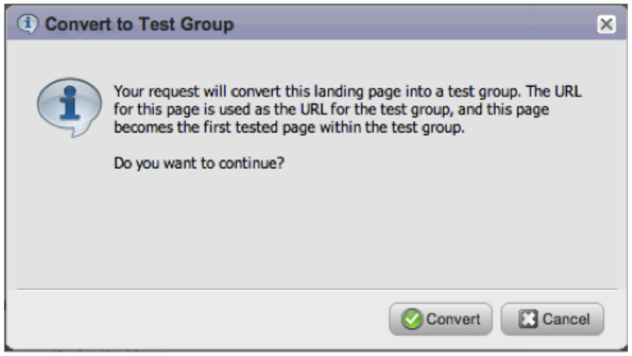


Step 2: Place the offer in Page A

I'm only using text links here. I could use two buttons or even a form.

Step 3: Convert to a Test Group

Use the Landing Page Actions menu to `Convert to Test Group`. The following dialog will appear. Press `Convert`.

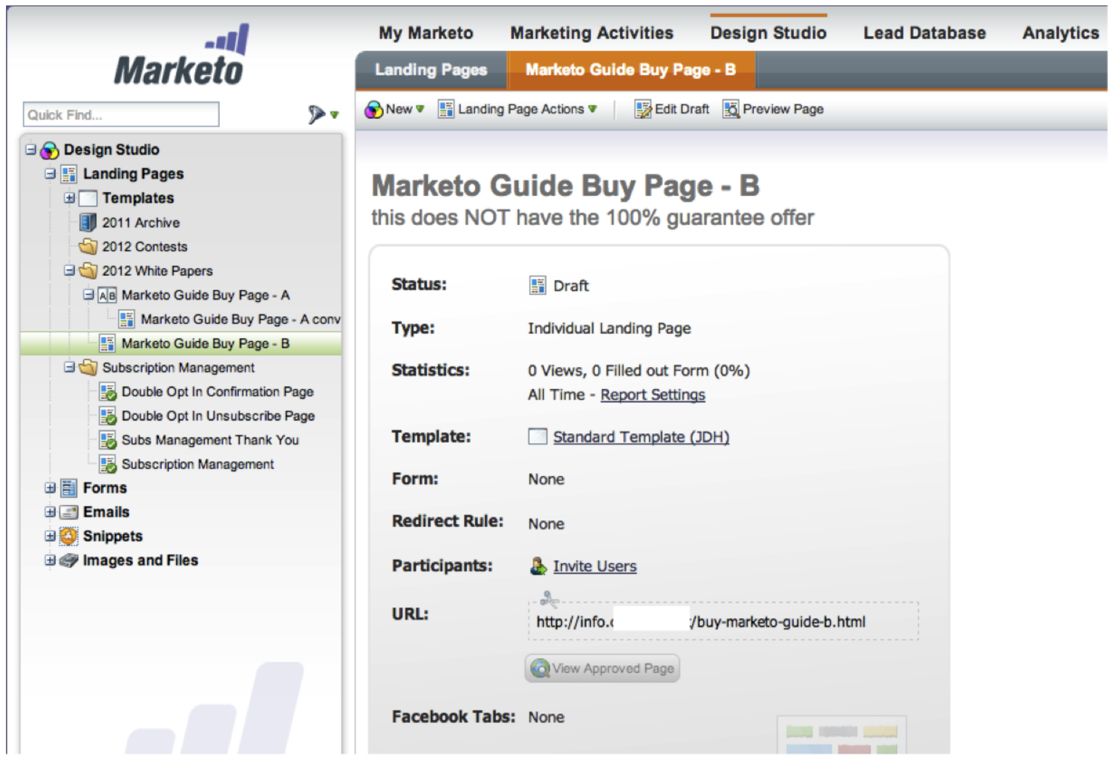


The Test Group will take the original page A URL and the original page a name.

Step 4: Clone Page A to Create Page B

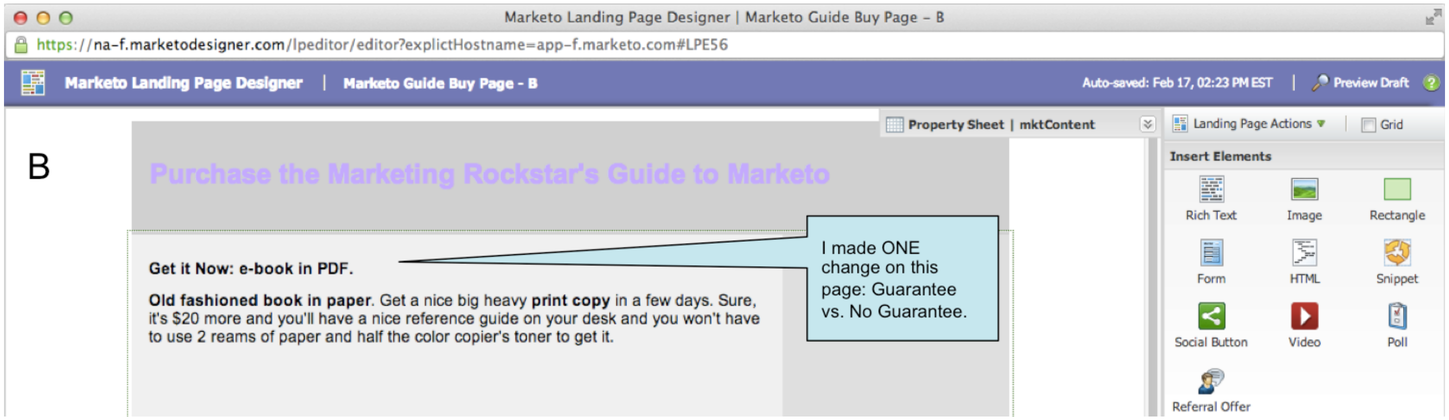
Typically you will want to Clone Page A to create a Page B. Doing so will ensure you have an exact replica to adjust. The difficulty is cloning a Test Group Page drops Page B *outside* the Test Group!

The new Page B has its own URL, but that doesn't matter so much right now.



Step 5: Edit Page B's Offer

Here I remove the 100% guarantee offer. That's it.



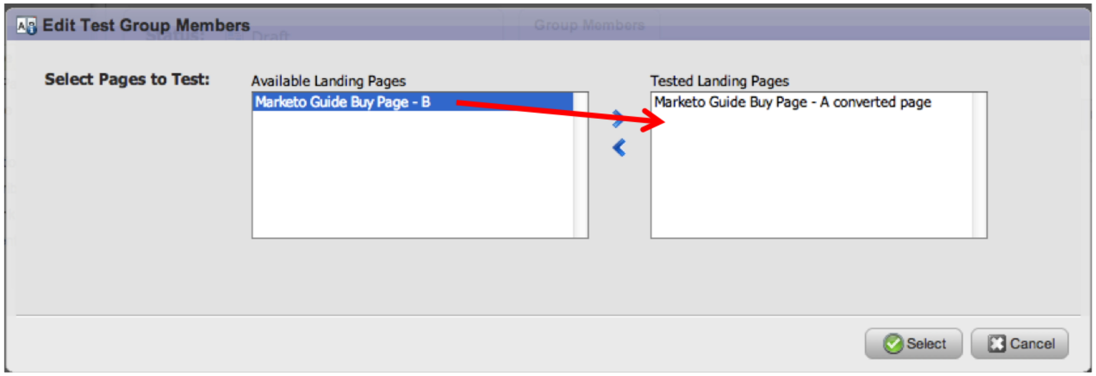
Step 6: Add Page B to Test Group

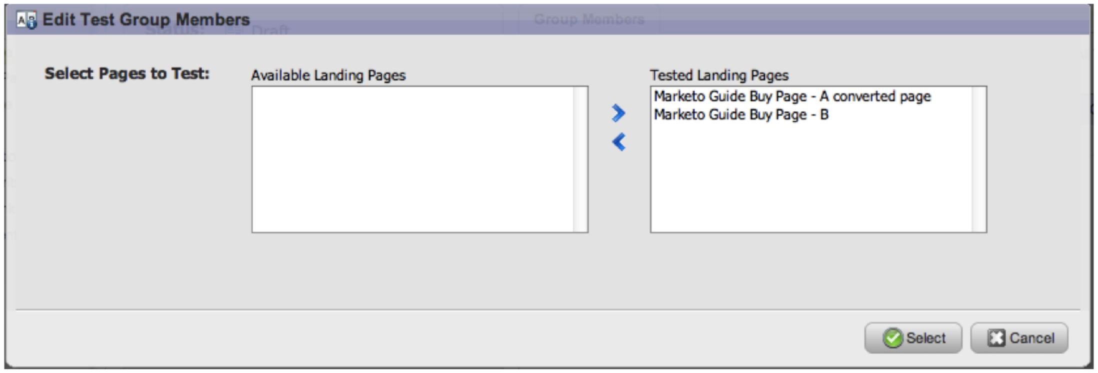
To add the cloned Page B to the Test Group, go to the Test Group.

Note: only unapproved pages can be added to a Test Group.

Menu: `Test Group Actions > Edit Group Members`

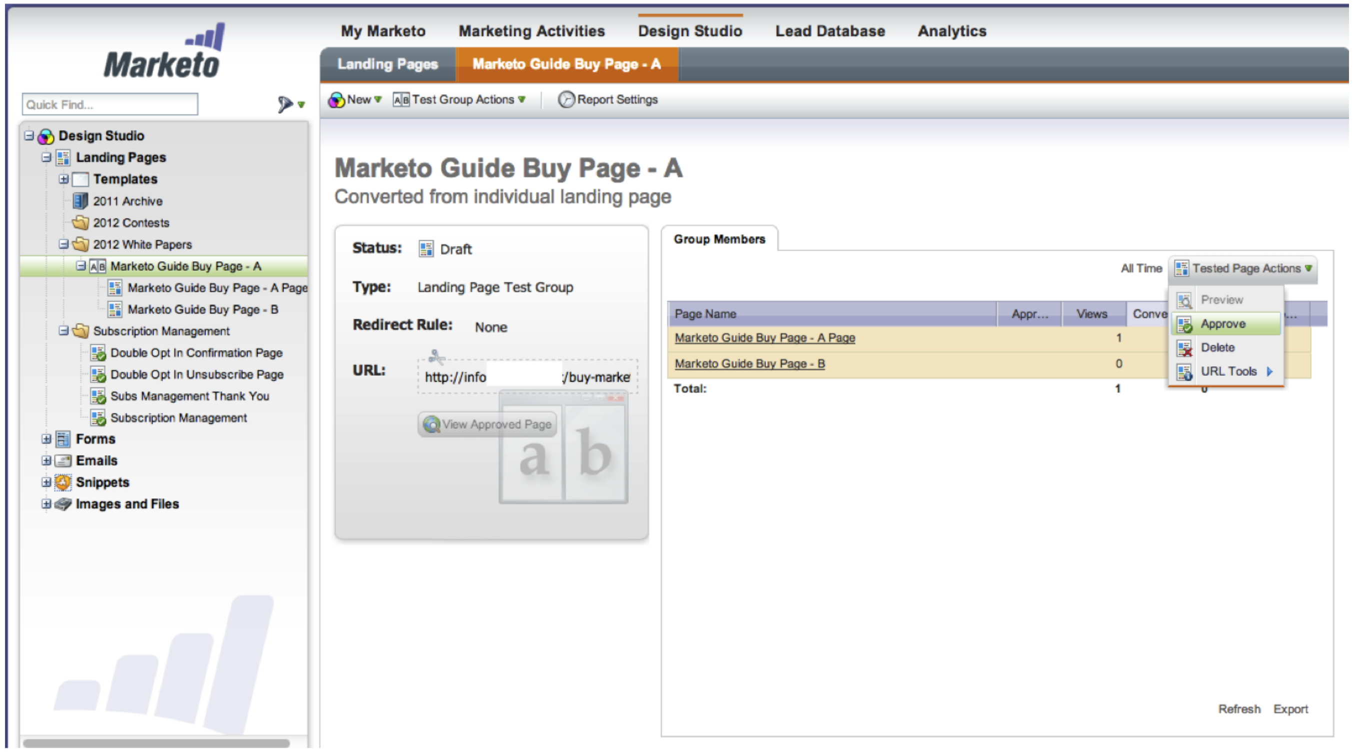
Use the arrows to move the available page(s) to the Tested Landing Pages box.





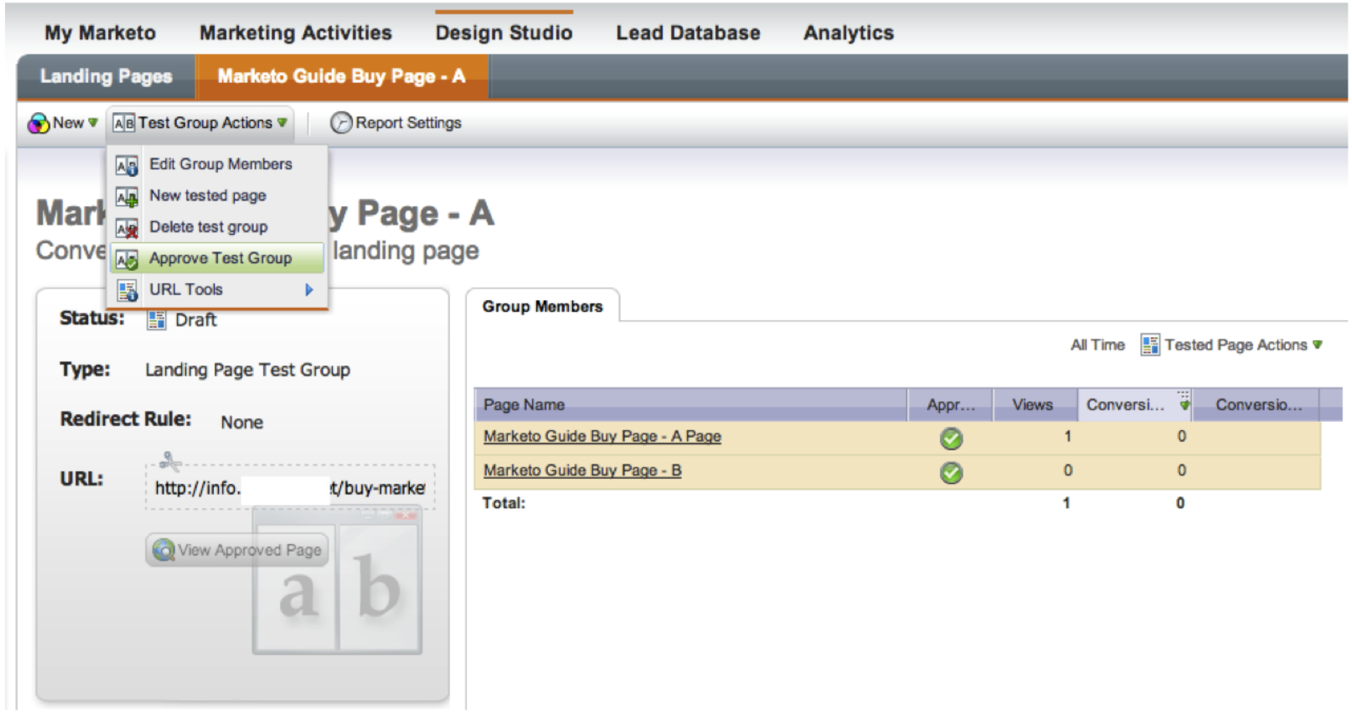
Step 7: Approve the AB Pages

You can approve or unapprove individual pages inside the Test Group by selecting them and using the `Tested Page Actions` menu. If you go to the Approved Page's URL, you will see the page with the actual URL.



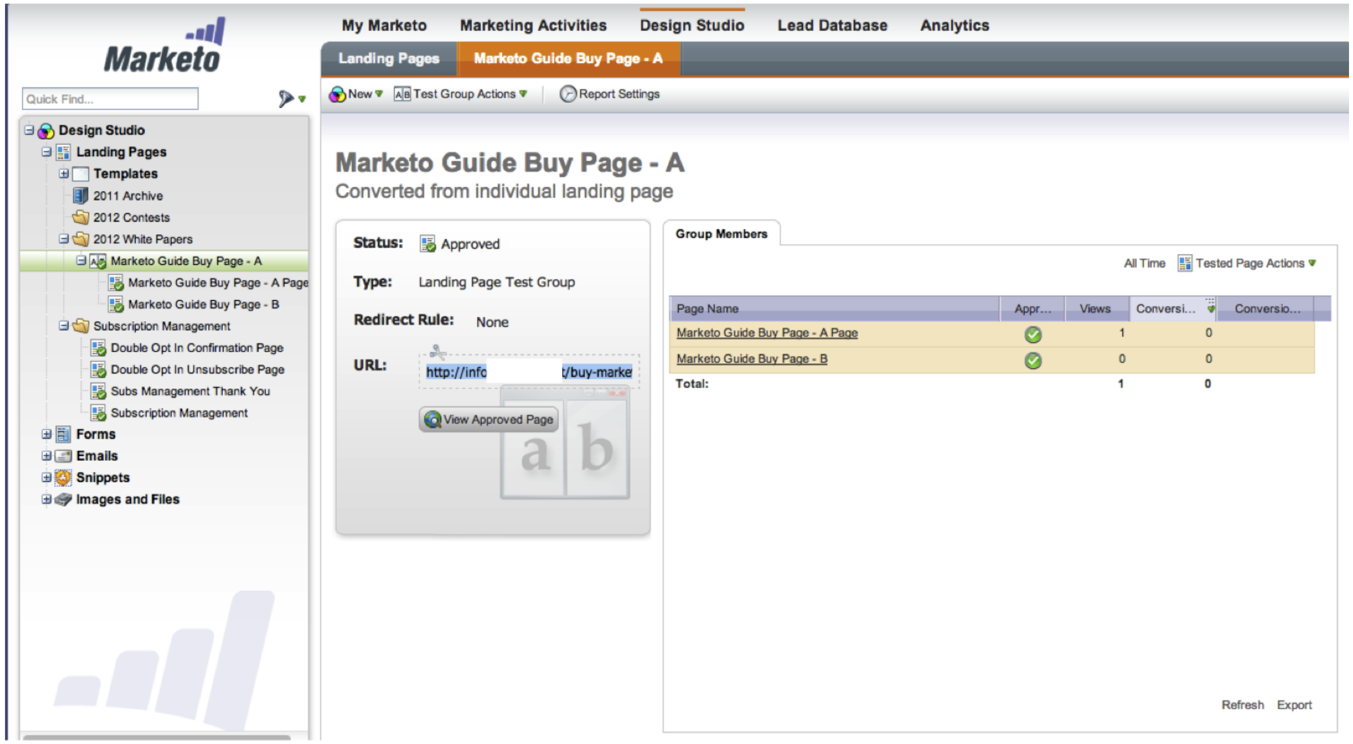
Step 8: Approve the Test Group

In order for the Test Group URL and AB Testing functions to work, you also need to Approve the Test Group: `Test Group Actions > Approve Test Group`.

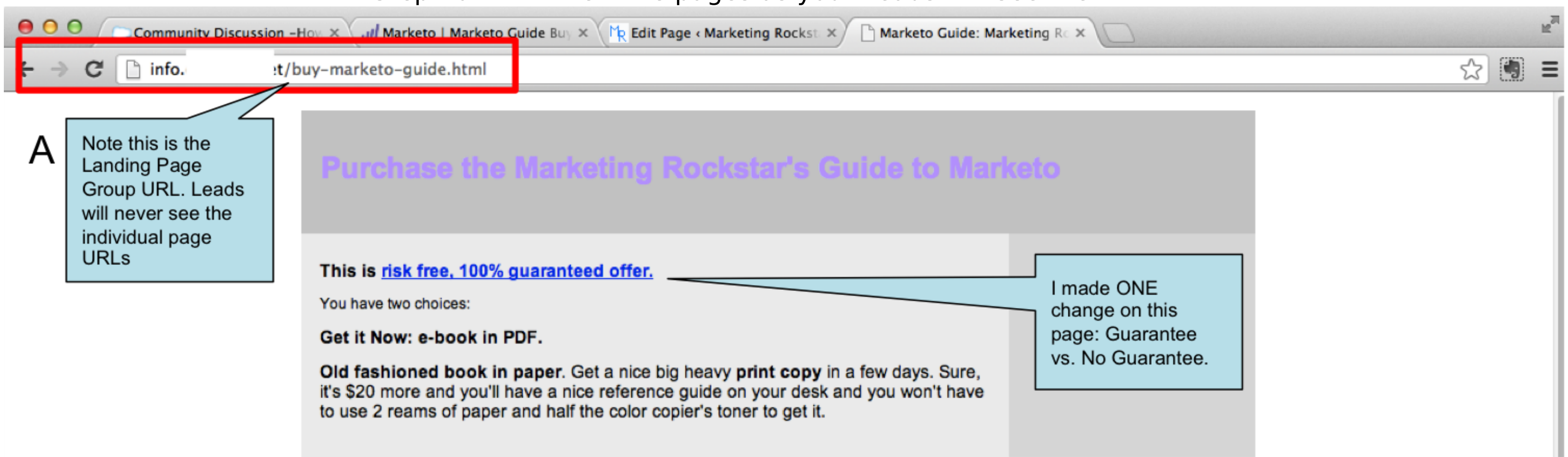


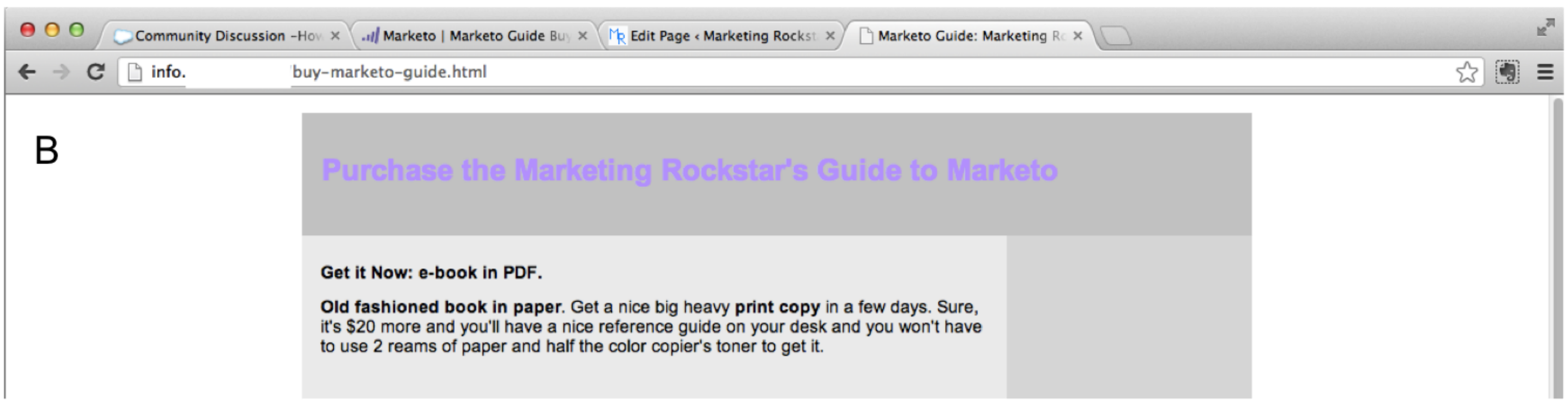
Step 9: Test out the Test Group URL

This is the URL you will use in an email, link, etc.



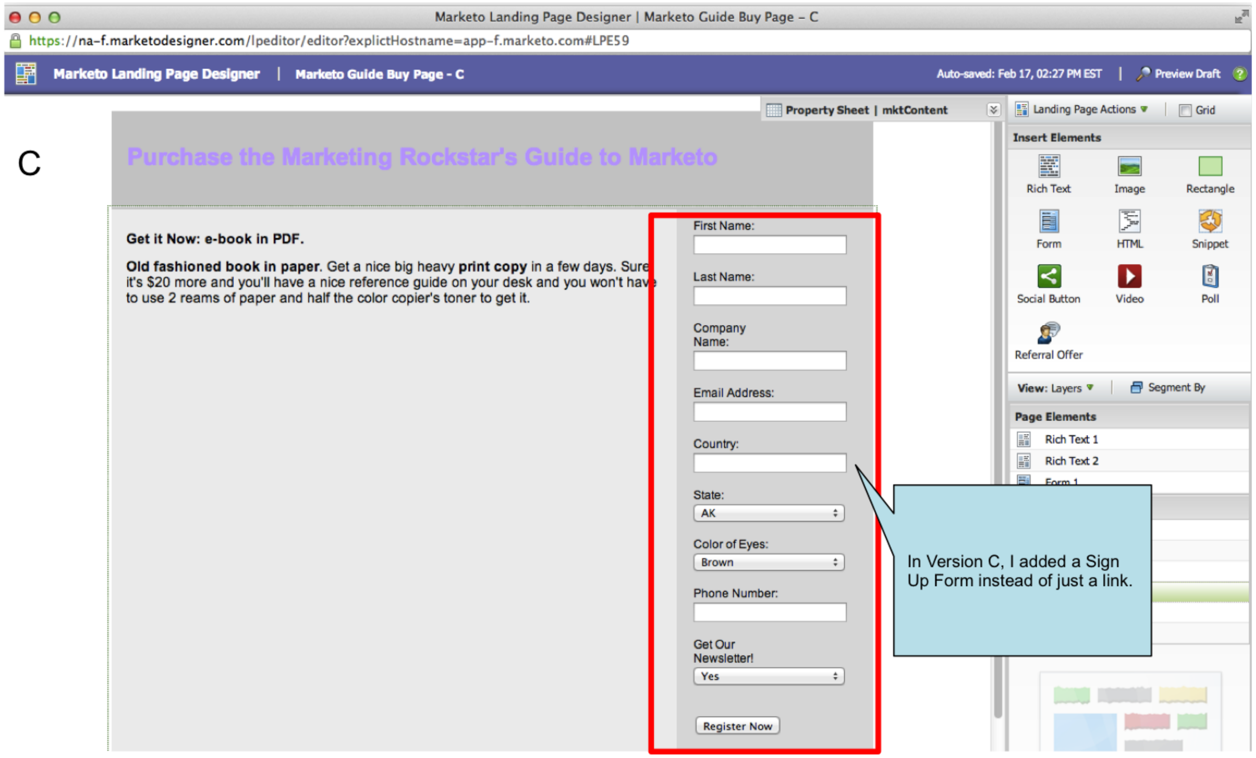
Step 10: View the pages as your Leads will see them



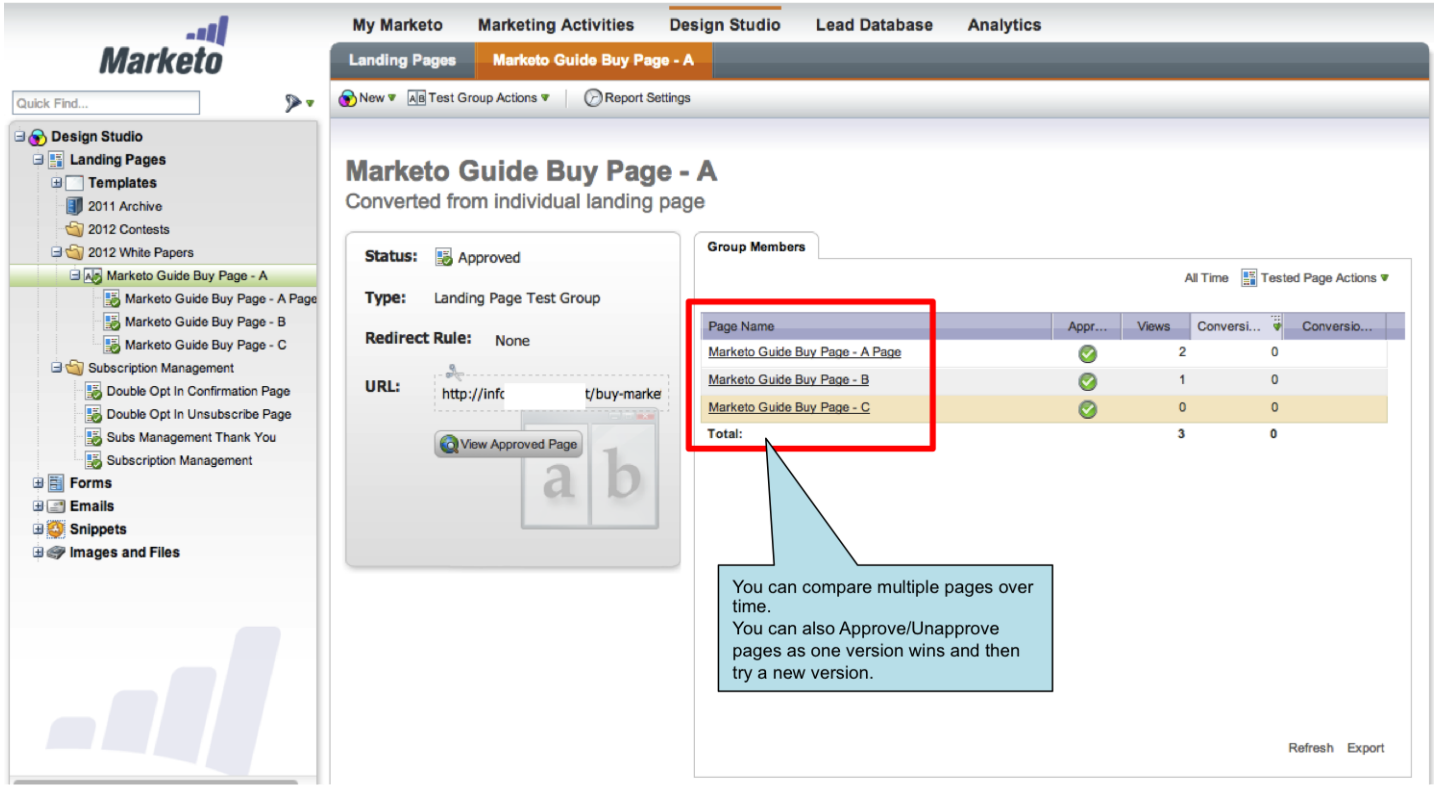


Step 11: Optional: add a third page, C with a new change

In page C, I will test a Form against no form, depending on who wins: A or B.



This is how Page C will look inside the Test Group:

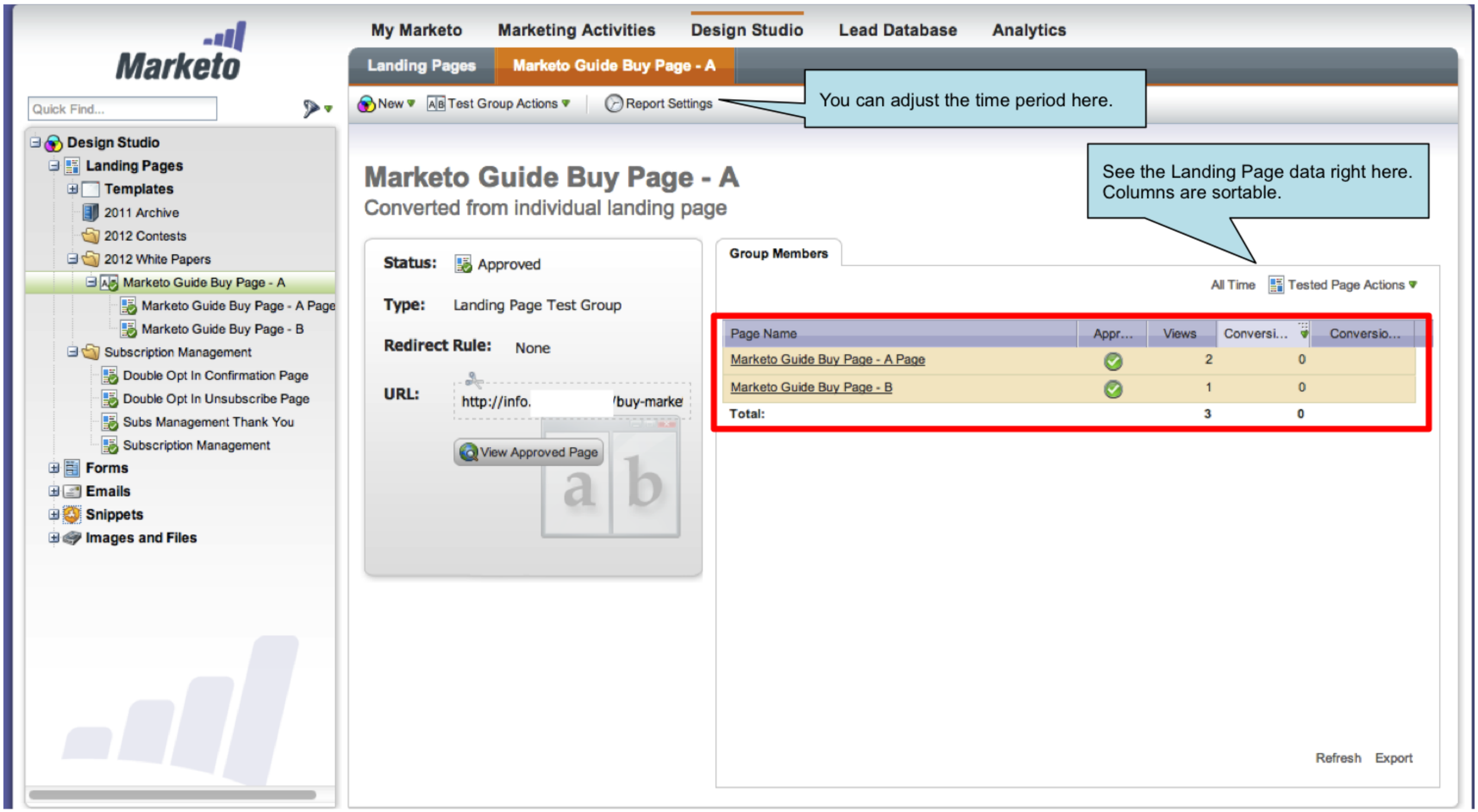


Reporting on AB Testing

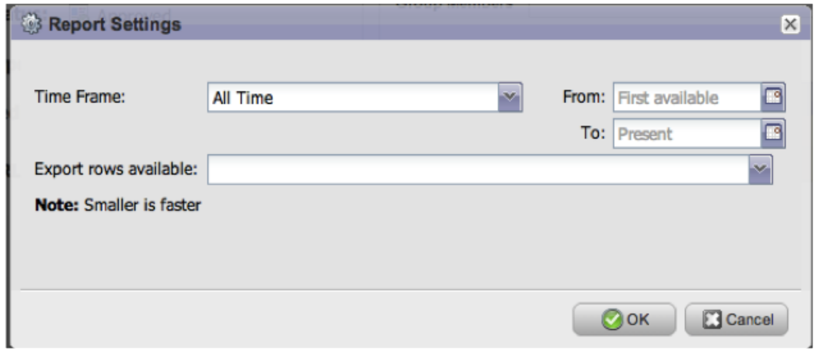
Now that we have a couple of pages out in the wild, we can report on our success. There are three ways to do this: Test Group Summary; Smart Lists; or Landing Page Reports.

Landing Page Test Group Summary

This is the easiest method. Simply click on the Landing Page Test Group. Marketo will show you the Views, Conversions, and Conversion% for all pages within the Group.

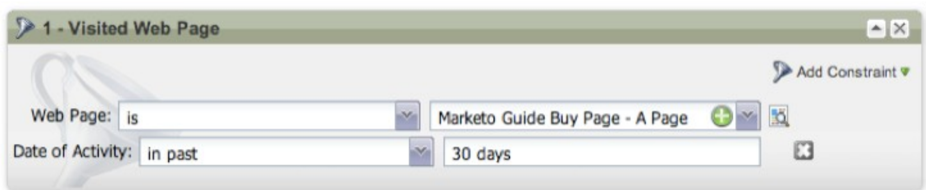


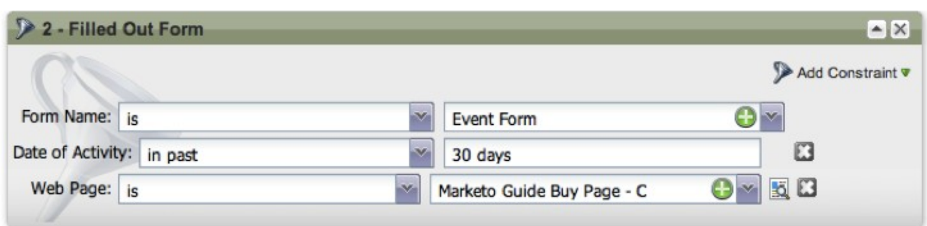
You can adjust the Report Settings time period as well.



Smart Lists

Using Smart Lists for AB testing may not be as helpful for straight conversion data. You can use the various filters to bring up lists of Leads who filled out either page or even visited the page. This data can be used to better determine who is reacting to each offer.





You might consider using the Lead Performance Report and a Smart List constraint as well.

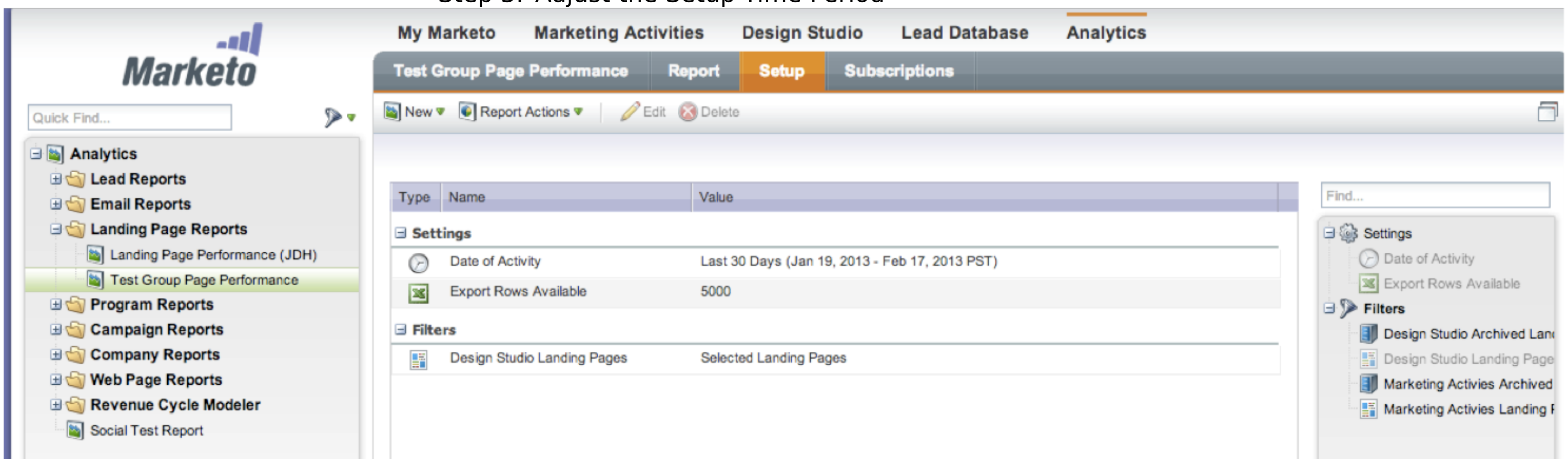
Landing Page Reports

The Landing Page Report is essentially the same as the Test Group Summary as they work off the same function.

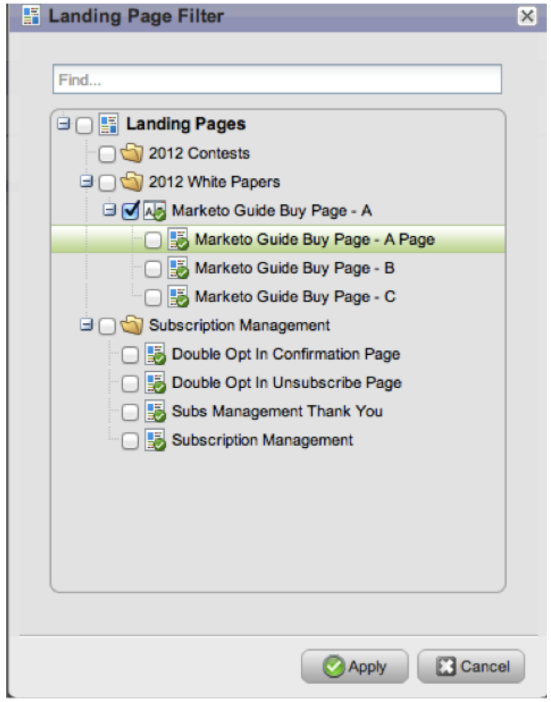
Step 1: Go to Analytics

Step 2: Clone the Landing Page Report

Step 3: Adjust the Setup Time Period



Step 4: Select the Page Groups to Report on



Step 5: Press Report

This report will now show you the coveted conversion% as well as the number of New Names acquired by Marketo via these pages.

Chapter Review

Self-Quiz

How do you create an Landing Page Test Group?

____

How do you add pages to a Test Group?

____

You should change at least two items on every page: T/F?

____

Recommended Resources

Marketo Documentation Marketo

[Landing Page Optimization Cheat Sheet]

[Landing Page Glossary]

[Creating a New Landing Page Template]

[Editing Landing Page Templates]

[Example Landing Page Template]

Marketo Community Marketo

[Referencing Marketo Pages or Website pages in Marketo]

[AB Testing with the Stars – Summit 2012]

Tools

[Optimizely]

[Google Website Optimizer] (Experiments) – part of Analytics

[Yottaa]

[Unbounce]

Experts

[Real Life CTA Examples - HubSpot]

[Which Test Won] | [Case Studies] | [Tech Guide]

[Increase Conversion Rates] - Mixergy

[Marketing Sherpa]

[Using the MailTo Tag in Marketo] – Eric Hollebone

Chapter 17. Subscription Management

At a Glance

Overview

Building a subscription management system will increase your active and marketable database as well as help you stay compliant with local privacy laws.

Caution: references to legal situations are not intended as legal advice. Seek proper legal counsel in your jurisdiction(s).

One of Marketo’s key advantages for the marketer is the ability to integrate and manage contact preferences for all modes of communications, marketing channels, and more. Many of my clients request help creating subscription management workflows to graduate from the universal Unsubscribe to a system where the Lead can select the type, mode, and frequency of communication from their firms.

Developing a system from scratch is fairly easy. You will need access to an SFDC Administrator and possibly your web programmer, depending on your needs. In this section, I will build an example system using only SFDC and Marketo out of the box features. There are a few places for fancier functions and I will note those for you.

There are 7 components to building a successful subscription management system.

1. Privacy and Communication Policy
2. Subscriptions and Communication Channels
3. Database Fields and Campaigns
4. Marketo Lists
5. Marketo Form
6. Marketo Page
7. Marketo Workflows

Subscriptions and Policies

You probably have a privacy policy and one or more "subscriptions" such as a newsletter. Perhaps you have different types of emails you send to your opted-in list. You also communicate with your prospects and clients via Phone, Email, Post, and even SMS.

You should have a policy clearly explaining to your audience how you will communicate with them, when, and for what, while providing the option for your audience to change those methods.

Privacy and Communication Policies

If you don't already have a policy, please make one, even if it is a very simple statement about not sharing information with third parties. You may also need a statement about use of Cookies. Please seek proper legal advice for establishing a policy and placing it on your website. At a minimum, you should include:

- What you will and will not do with a person's information.
- How often you may contact someone (although this may differ by mode or subscription).
- If you use Cookies and how they are used.
- How someone can Unsubscribe or make a complaint.
- Contact details of your firm as well as someone who can take direct action to help someone: phone, email, fax, and address.

Example Privacy Policies

The Economist Group’s privacy policy
Marketo
New York Times

Marketo’s contract also governs your firm’s acceptable use of Marketo to send email. Please note that in addition to local or national laws, you must follow this policy as well. Key points include:

- All non-operational emails must include the default opt out link or equivalent.
- Leads must have consented in some way to your communications. This must be active consent, where someone said “Yes, please sign me up for X” including becoming a customer.
- “Any such revocations of consent should be honored in 72 hours.”

The 72-hour requirement is less than the 10-business day requirement in CANSPAM. I strongly urge you to build a process that enables removal within *24 hours* through automation or once a revocation notice is received by email or regular mail. I am continually surprised when a firm offers a self-service subscription management page and then tells me to expect the change within 10 business days. No automatic system should ever take that long.

Fortunately, Marketo enables you to offer your leads a change within 1 second.

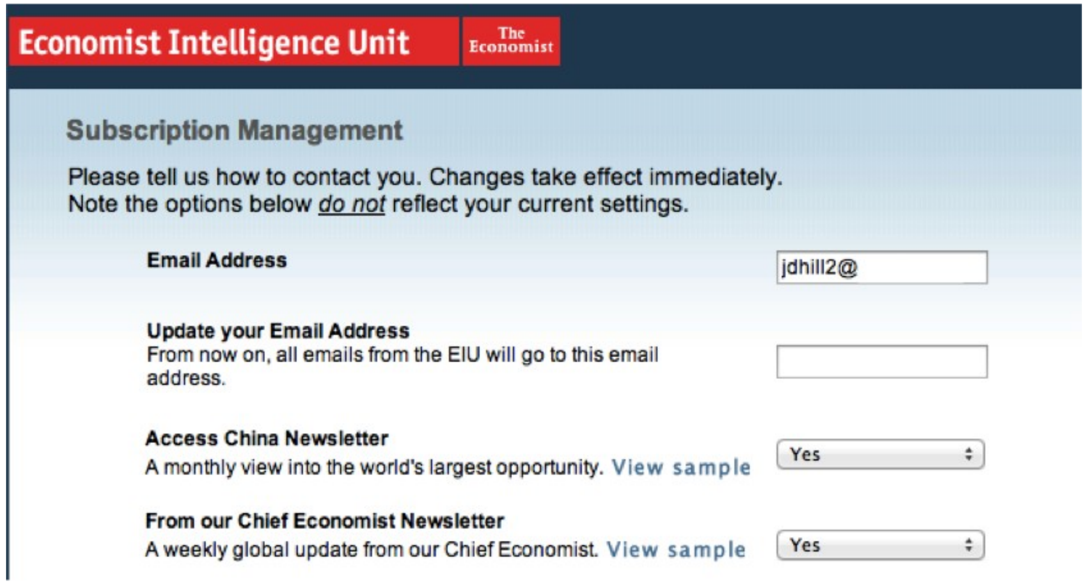
Contact and Frequency Policies

Each communication type should have a contact frequency policy. While this is not a legal requirement, it is a good thing to have and make public because it sets expectations internally and externally about the frequency of email. I recommend noting this in any welcome emails, your privacy policy, and on the subscription management page next to each option.

Once you establish a policy, be sure to train your staff on it so they know why it is there and how to use it. Later on, I will show you how to operationalize the policy using Smart Lists.

At one firm, the policy was no more than 2 *promotional* emails in a 30-day period. Promotional emails were specific requests to contact sales or to try our product. These were not content emails or other opted in newsletters, but invitations were considered promotions. Some firms go as far as no more than 2 or 3 emails in a 30-day period no matter what.

On your Privacy Page and Subscription Management page, be sure to note the frequency of emails to expect. For example:



Channels and Offers

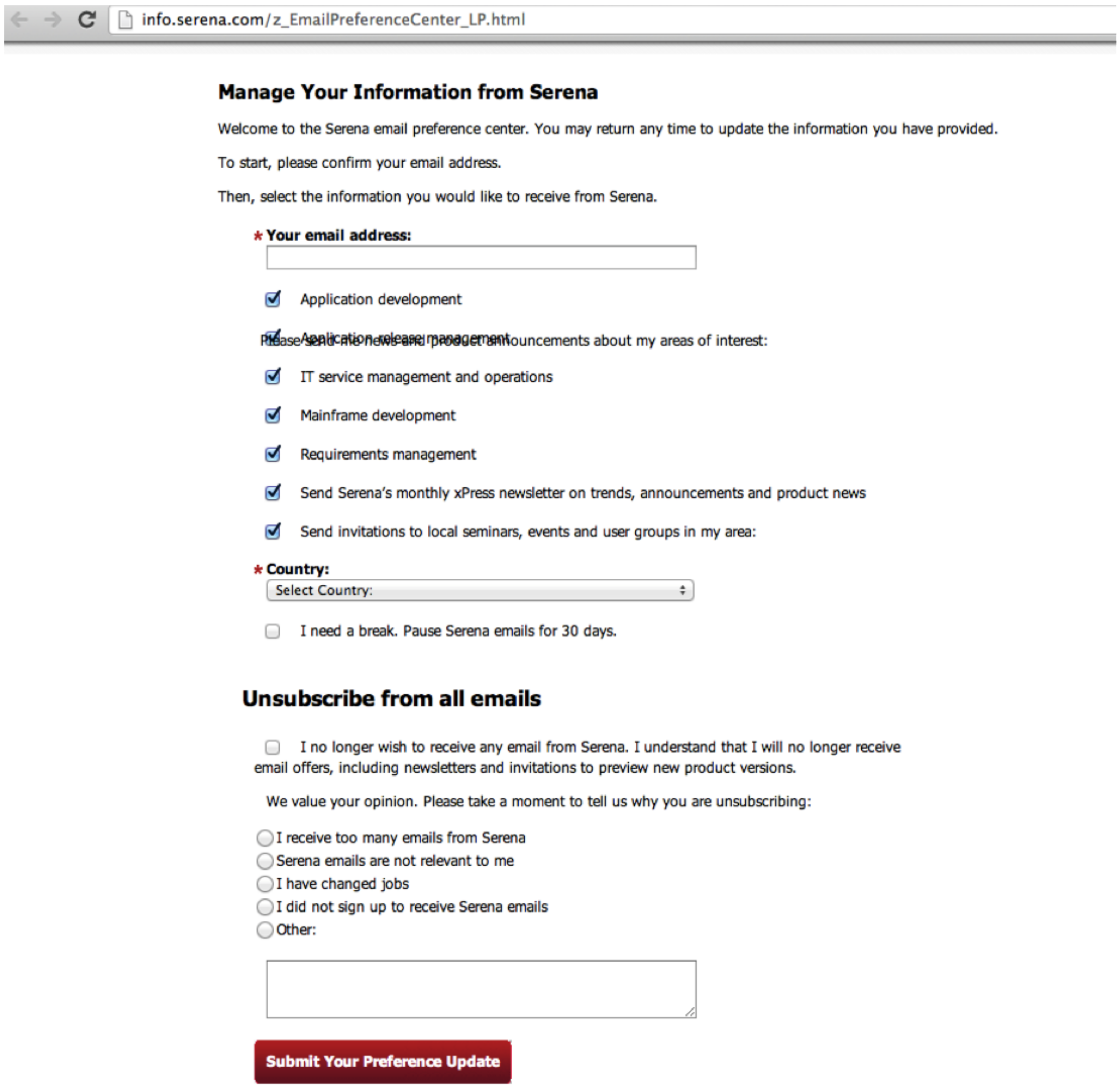
Now we come to the fun Marketing part: what are you planning to send to people? Do you know how they want to communicate with you? Hopefully you know already. This chapter will assume a basic set of channels and communications, which you can then apply to your situation.

All fields have a value of `Yes/No/Blank` as described in Database Changes below.

Channel/Communication	Describe it	Frequency	Field Name
Webinar Invitations – Email	Invitations to webinars via email	1 per month	Webinar Invitation
Live Event Invitations – Email	Invitations to live events featuring your speakers. Also includes tradeshows via email.	Usually once per month	Live Event Invitations
Blog Email Updates	Blog email updates	Up to once a day.	Blog Email Updates
Promo Emails	Promotional emails featuring our products.	Up to twice per month.	Promo Emails OK?
Sales to Call by Phone	Sales may call the person.	Within reason.	Ok to Contact by Phone?

Channel/Communication	Describe it	Frequency	Field Name
Postal Mail	Send regular mail	Any	Postal Mail OK?
Fax OK?	Send promo faxes	None	Fax Opt Out
Do Not Call	(default SFDC)	None	Do Not Call
Unsubscribe All	Ends all email unrelated to account. (default SFDC)	None	Email Opt Out
Is it ok to allow third parties to email or contact you?	Allows us to rent your name.	None	Share Details with Third Party?
SMS OK?	Allows us to text you.	No more than once a week.	SMS OK?
Newsletter	You receive our weekly newsletter by email	Weekly on Tuesdays.	Newsletter Opt In

A good example of a multi-channel page is from Serena.com. Note how they also added a survey to learn about the causes of unsubscribing.


info.serena.com/z_EmailPreferenceCenter_LP.html
Manage Your Information from Serena
Welcome to the Serena email preference center. You may return any time to update the information you have provided.
To start, please confirm your email address.
Then, select the information you would like to receive from Serena.
* Your email address:
Application development
Application release management
Please send me news and product announcements about my areas of interest:
IT service management and operations
Mainframe development
Requirements management
Send Serena's monthly xPress newsletter on trends, announcements and product news
Send invitations to local seminars, events and user groups in my area:
* Country:
Select Country:
I need a break. Pause Serena emails for 30 days.
Unsubscribe from all emails
I no longer wish to receive any email from Serena. I understand that I will no longer receive email offers, including newsletters and invitations to preview new product versions.
We value your opinion. Please take a moment to tell us why you are unsubscribing:
I receive too many emails from Serena
Serena emails are not relevant to me
I have changed jobs
I did not sign up to receive Serena emails
Other:
Submit Your Preference Update

Process for Handling Requests

Caution: each country has a legal time limit for acting on requests. In the US, firms must act within 10 days of receipt.

Not everyone will use the "unsubscribe" or subscription management link, so you must prepare a process for handling non-automated requests. Your marketing team should have permission to change the privacy settings of any Lead in your CRM or in Marketo to quickly handle the request.

- **Email Requests**: a few people will reply to the email with "Unsubscribe" in the subject or in the body. Be sure your team is monitoring all generic boxes for such requests and they are monitored daily.
- **Mailed Requests**: on rare occasions, someone may send a request for list removal by post. Make sure your mailroom forwards letters to the right team.
- **Phone Calls**: while rare, it is possible an annoyed customer or lead will tell a staff member of their request for removal by phone. You should ask Sales to note the request and forward it to Marketing immediately.

Training the Team to Follow Policy

As Jennifer Melwani stated in this LinkedIn conversation, it is important your entire team understands and honors these preferences once they are live. I recommend converting the process documentation and policies into a clear document or presentation for training the team, and new recruits, on what to do. For example, each field choice by the prospect should be clear:

- **Email Opt Out**: this means no one can email that person. Period. No sales emails at all. If the contact is a client, only email them about their account or billing.
- **Topic Choices**: do not email that person about other topics, no matter what the temptation.
- **Phone/SMS**: no prospecting, marketing, or appointment setting calls.

Example Training Document: Salesforce

We recently implemented a new communications system to comply with local laws as well as keep our prospects and clients engaged across a variety of media. It is important for everyone to adhere to the new system to abide by each lead's wishes. It is company policy to do so since we want to treat people the way we would want to be treated in their situation. If you don't like spam or calls, then don't call someone who requested no calls.

In Salesforce, you will now see a section called Contact Preferences, detailing the current preferences of that Lead or Contact. We use an opt in system for all email communications, which means explicit permission was granted by the person.

Let's review each option and what they mean. A helpful guide is available when hovering over the question mark.

Field Name	Possible Values	What you should do	Notes
Newsletter	True/False	True=ok to send False=do not send	Should also be Yes/No
Live Event	Yes No Blank	Opted in, ok to email Opted Out, not ok Did not provide permission, not ok.	Could be considered promo, but depends on your situation
Webinar Invitations	Yes No Blank	Opted in, ok to email Opted Out, not ok Did not provide permission, not ok.	
Blog Update Emails	Yes No Blank	Opted in, ok to email Opted Out, not ok Did not provide permission, not ok.	Should only be automatic blog updates.
Auto Alerts	Yes No Blank	Opted in, ok to email Opted Out, not ok Did not provide permission, not ok.	If your product sends alerts, this may help.

Field Name	Possible Values	What you should do	Notes
Ok to Contact by Phone	Yes No Blank	Opted in, ok to call Opted Out, not ok Did not provide permission, ok.	This may vary by jurisdiction.
Postal Mail Ok?	Yes No Blank	Opted in, ok to mail Opted Out, not ok Did not provide permission, ok	Most locations allow mail without permission
SMS OK	Yes No Blank	Opted in, ok to text Opted Out, not ok Did not provide permission, not ok.	You should have this ready, but not always needed on the web page unless you plan to use it.
Fax Opt Out	T/F	True=ok to send False=do not send	SFDC default, not usually required.
Do Not Call	T/F	True=ok to send False=do not send	SFDC System Field
Email Opt Out	T/F	True=do not send ANY False=ok to send	This maps to Marketo's Unsubscribed field.
Share Details with Third Party	Yes No Blank	Opted in, ok to share Opted Out, not ok Did not provide permission, not ok.	You should have this available just in case.

Example Training: Marketo (Marketers only)

Marketers will have an additional document describing the SFDC Campaign system as well as the Static and Smart Lists to use when emailing or excluding leads. Having clear descriptions of each list is critical, especially with a policy to use suppression lists for all email campaigns is vital to maintain your internet reputation and *trust with your audience.*

List Name	Type	When to Use	Criteria
Newsletter Subscribers	Smart/Static	Sending the newsletter	Newsletter Opted In
Suppression List – All	Static/Smart	All the time	Opted Out Invalids Not Actives Junk Leads
Live Event Opted In	Static/Smart	First filter for invitations	Live Event Opted In

Database Changes

Now that you have clear policies and procedures, you need to automate the solution so your prospects and customers can immediately adjust their preferences without your help. This section will show you how your policies translate into your database, system, and campaign process.

Database Field Changes

I recommend adjusting your CRM and Marketo to use human readable fields instead of True/False checkboxes. Humans must implement this policy in many areas, so avoid confusion with simple field choices:

`Newsletter Opt In: Yes/No/Blank`

So it should be clear to everyone that `Newsletter Opt In: Yes` means it is ok to send a newsletter. Contrast with what SFDC shows by default:

`Email Opt Out = True/False` (checked/unchecked)

So if `Email Opt Out= False`, that means it is ok to send email. What? A double negative? *Take thought out of the equation to avoid mistakes*. They happen. Don't let mistakes happen to 50,000 leads.

I prefer that `Blanks` indicate the person has *not made any choice* and therefore is automatically ***not opted out, but you can't contact them either.*** If the person is in your database without having the opportunity to choose for any reason, then you should not email them at all. In certain cases, a Blank may be legally ambiguous or legally ok, such as `Postal Mail` or sometimes `Phone` calls. If you [treat people with the Golden Rule](), however, then you should *never* use an undesired communication channel to reach out to a lead, because you would not want another marketer to do that to you.

You may need to migrate True/False options to the new setup. Create a table that makes it clear how the migration should proceed for each field. Ask your SFDC Admin to help you batch update each new field with the previous values. For example:

Old Field	Old Value	New Field	New Field Value
Webinar Invitations	True	Webinar Invitations Opt In	Yes
Newsletter	False	Newsletter Opt In	No

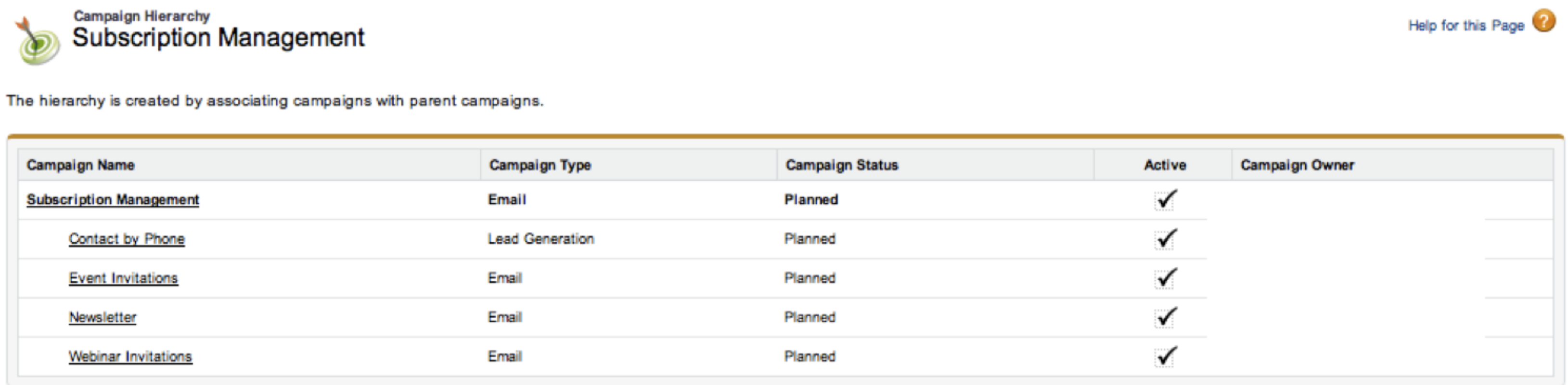
Once complete, be sure to remove or hide any old fields that will confuse people.

SFDC Campaign Hierarchy Setup

If you want to track your overall progress by keeping a constant tally of people who subscribe or unsubscribe to a particular channel, I recommend using Salesforce Campaigns. In this system, the fields you created in the last step act as toggles, triggering a change in SFDC Campaign Member Status. Then you can say later, "we have 4,000 people subscribed of 10,000 who subscribed over time, with 6,000 opted out."

For the example system, you should have a SFDC Campaign Hierarchy like this:

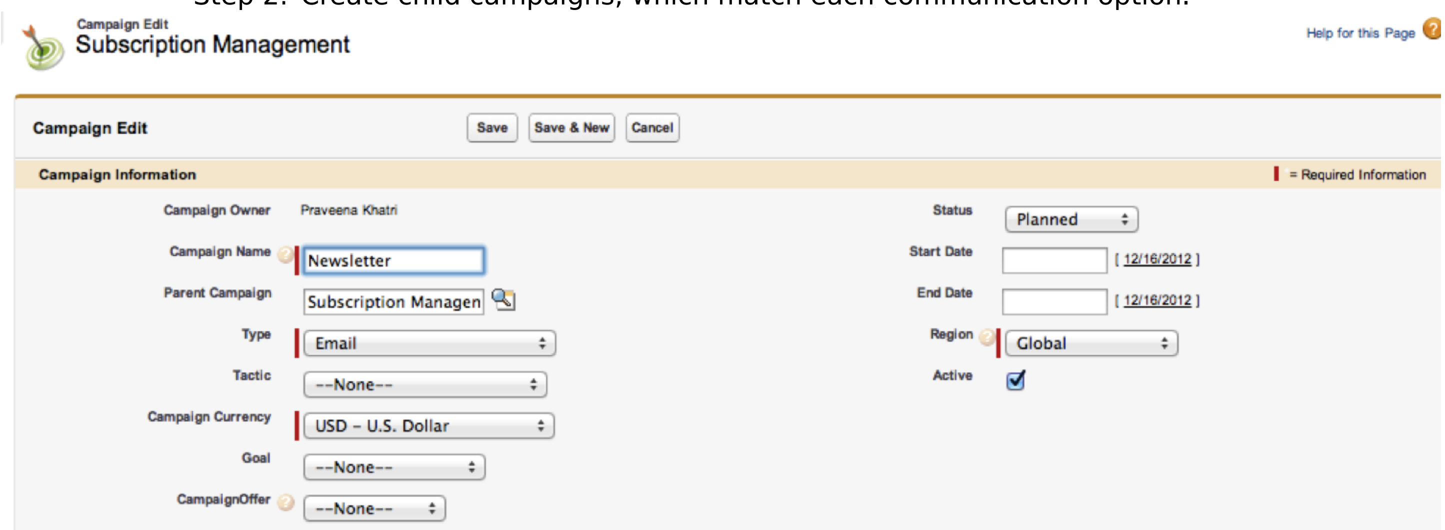
Step 1: Create a Parent "Subscription Management"


Campaign Hierarchy
Subscription Management
Help for this Page

The hierarchy is created by associating campaigns with parent campaigns.

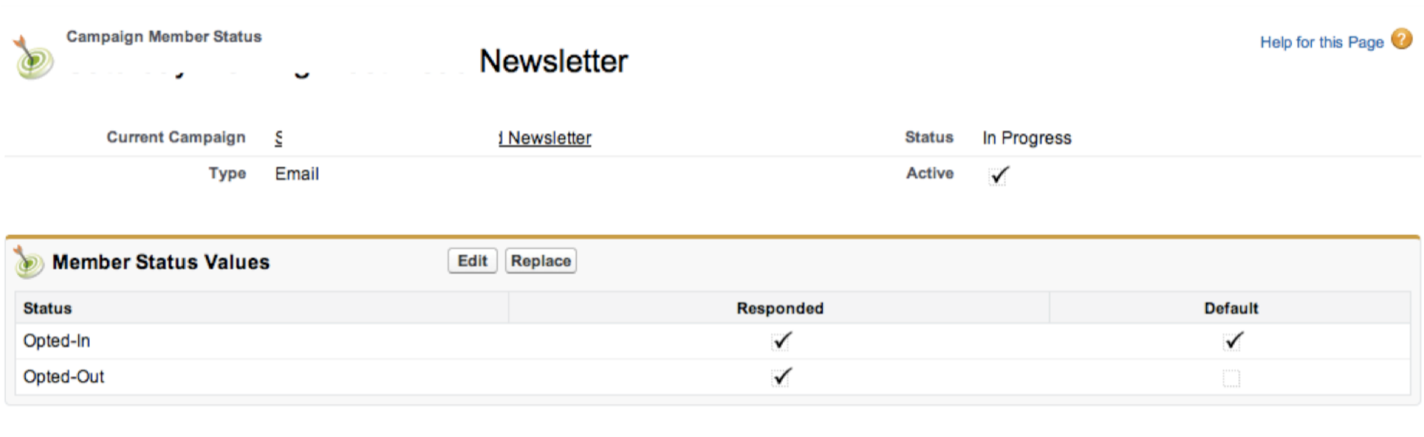
Campaign Name	Campaign Type	Campaign Status	Active	Campaign Owner
Subscription Management	Email	Planned	✓	
Contact by Phone	Lead Generation	Planned	✓	
Event Invitations	Email	Planned	✓	
Newsletter	Email	Planned	✓	
Webinar Invitations	Email	Planned	✓	

Step 2: Create child campaigns, which match each communication option.



Step 3: For each child and parent, use Member Statuses

The two statuses will be `Opted In` and `Opted Out`, both as `Responded` since the person took an action, and set `Opted-Out to Default` for all emails.



Building the System in Marketo

This is the core logic of how your Subscription Management system works. Please set it up carefully and test it thoroughly.

Campaign Policies

You should train your team on how to use the Opted In/Out and Suppression Lists to identify only the opted-in people you want to target. It is always bad to even accidentally email non-subscribers because they may silently spam block you instead of sending a hateful response. This will undoubtedly lead to a blacklist at some point. Here is what I recommend:

- Review Opted In Lists and how to then segment those using geographic, product, or other filters. E.g.: "Email Live Event Subscribers in New York who like Product Z." Usually, using `Member of List IN "Live Event Opted In"` is sufficient to avoid accidents.
- Review the `Suppression List` which should consist of people who are completely unsubscribed, Blacklisted, Competitors, Email Invalid=True, Spam Blocks, and anyone else who should never receive an email.
- Review Opted Out Lists and when to use them or not use them. Typically, I use such lists for counts and trend analysis, rather than any exclusion. You can use these as a failsafe.

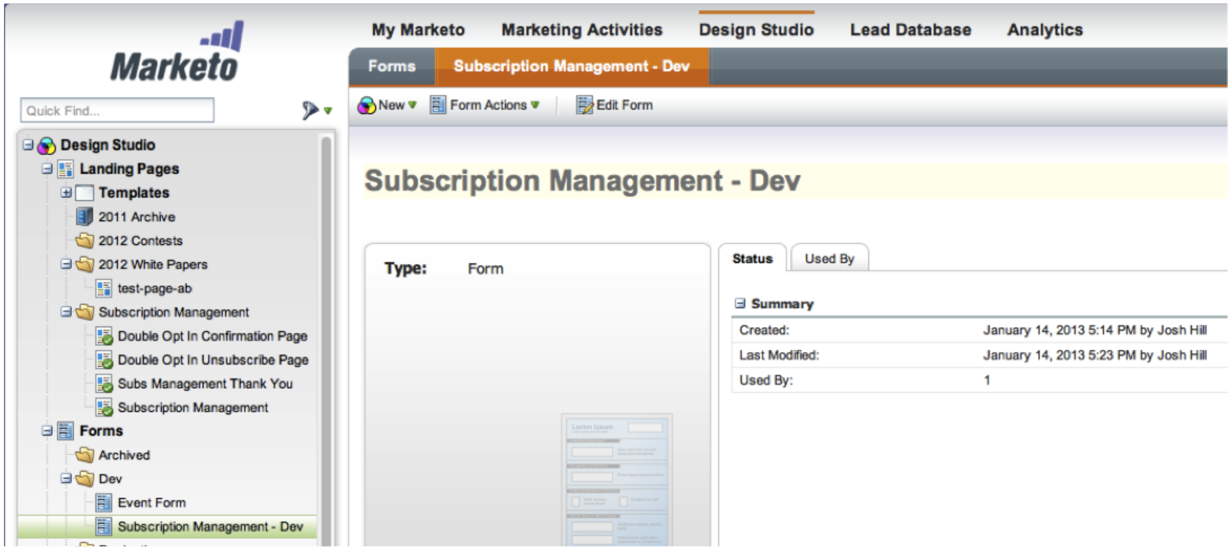
You will need three pieces here: the Subscription Management Form and two pages to handle the form submit.

Form Setup

Step 1: Go to Design Studio

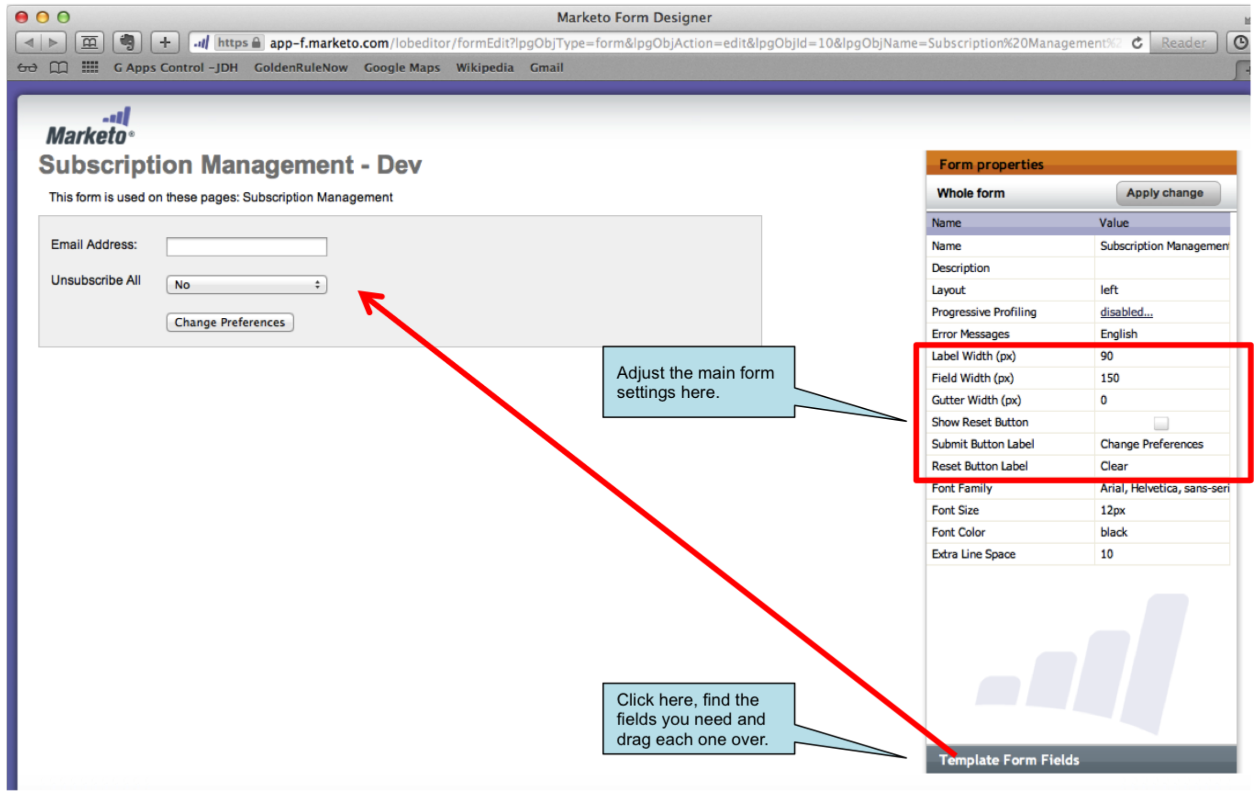
Step 2: Create a New Form under Forms > Dev

Name the form `Subscription Management – Dev`



Step 3: Drag in the relevant fields, including:

- Email Address = Required
- Unsubscribed = Required
- Any other fields like Webinar Invitation, Live Event Invitation, etc.

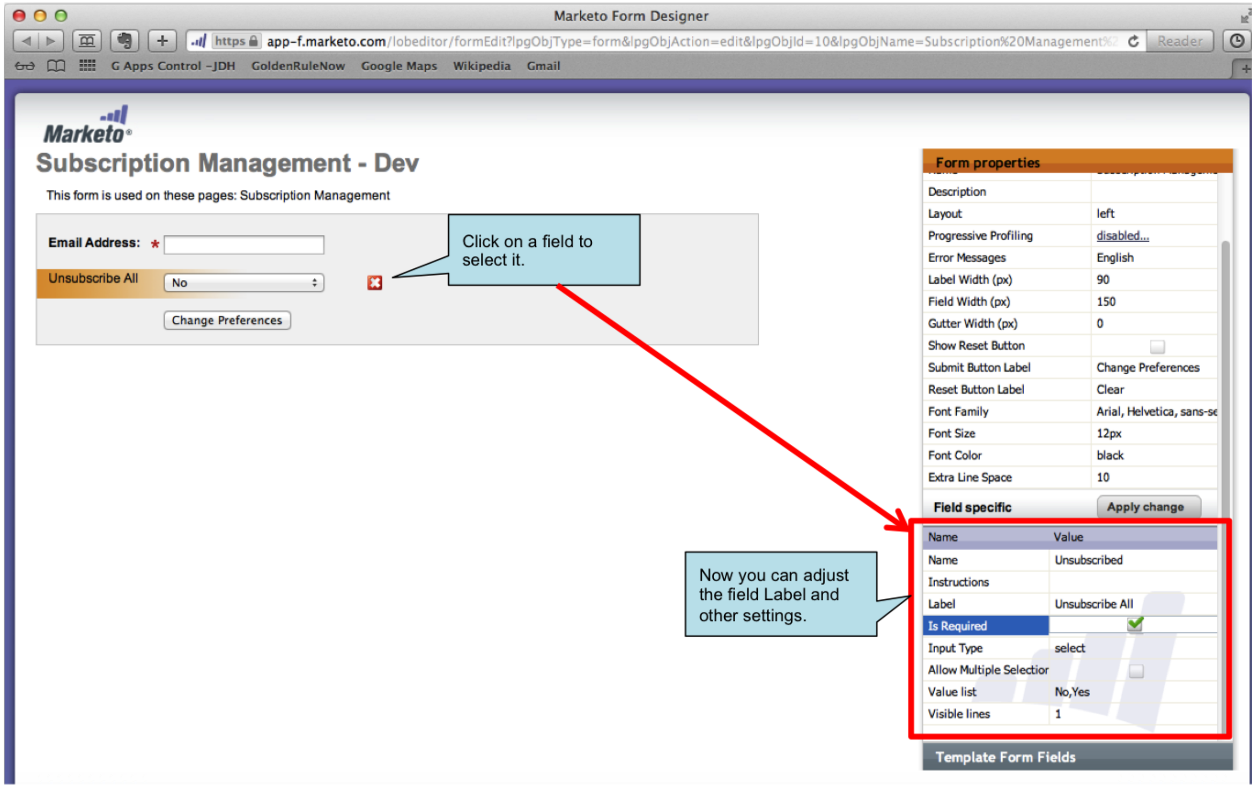


Step 4: Adjust the Whole Form Properties

- Show Reset Button = Unchecked
- Submit Button Label = "Change Preferences"
- If you want to adjust other attributes, do so now.

Step 5: Adjust Field Properties

- Definitely make all the fields required.
- Review that the fields are showing the correct drop downs like Yes, No, Blank (or checkboxes)
- Adjust the field labels that appear on the page.



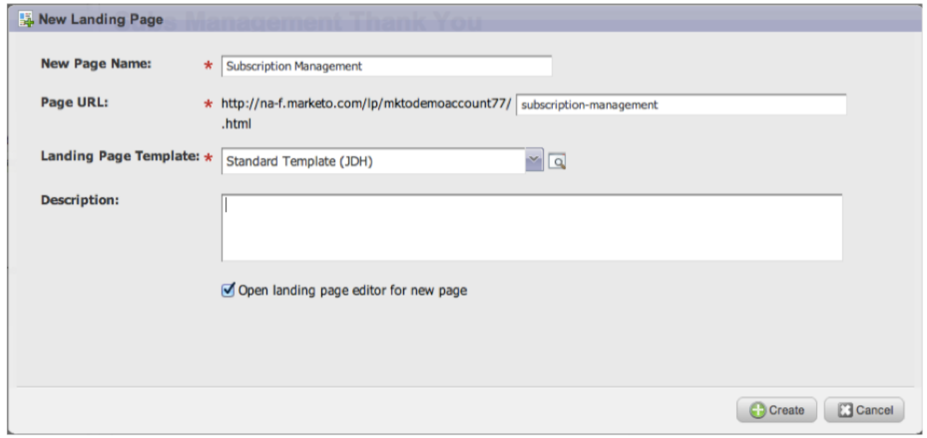
Step 6: When you are done, close the window.

There is no need to save or approve a form.

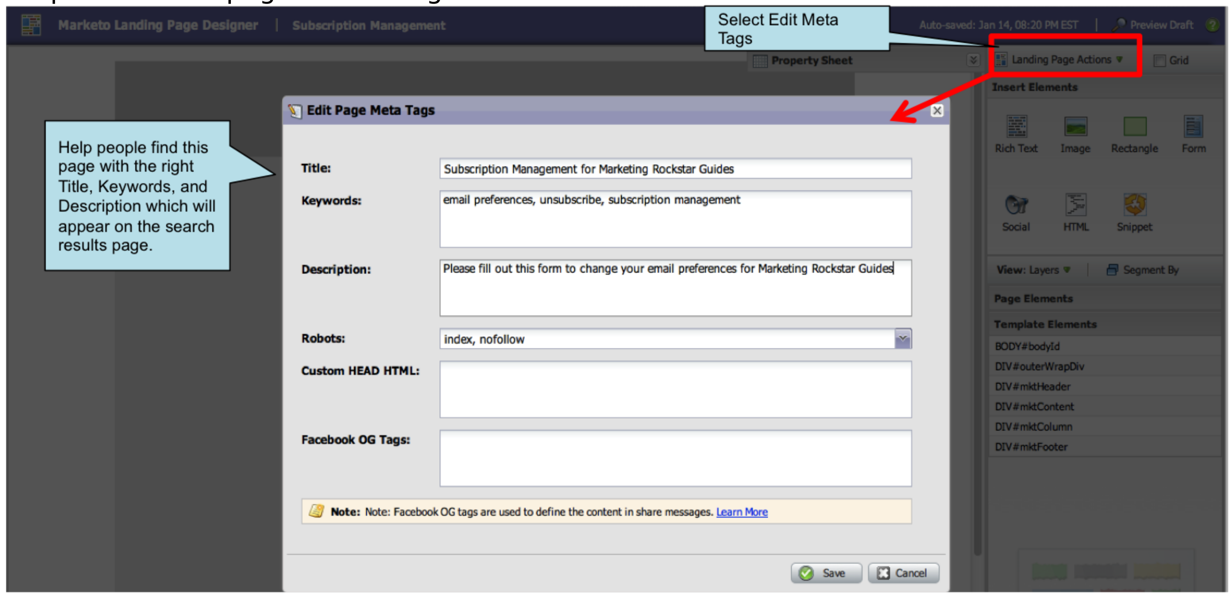
Page Setup

Step 1: Create a new page

Call it `Subscription Management` with the URL slug "`subscription-management`"

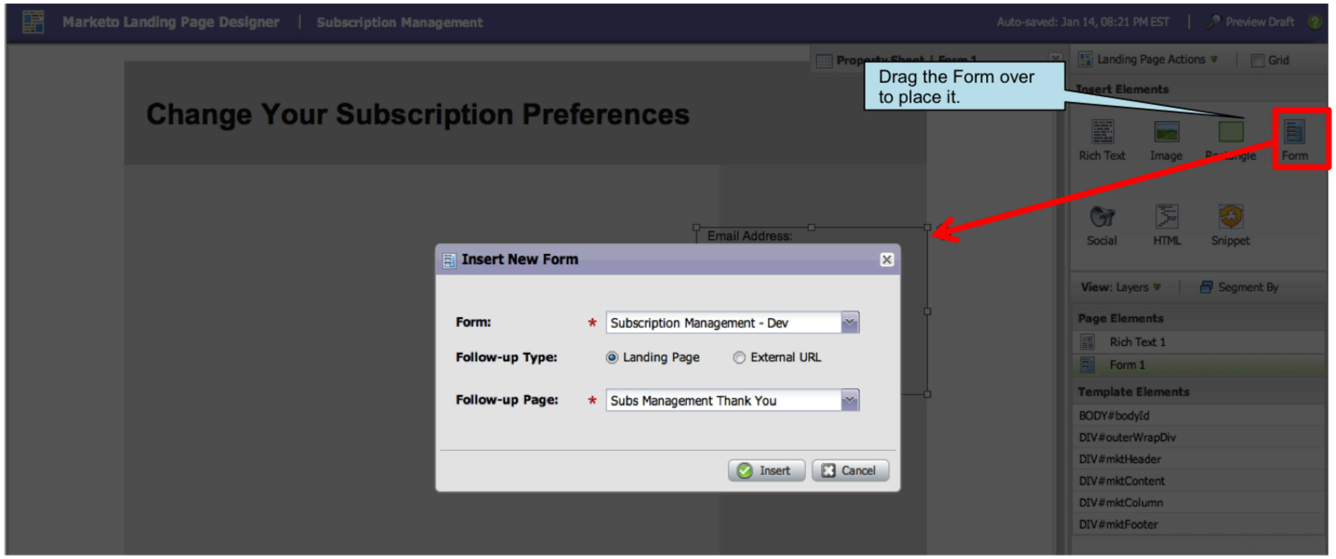


Step 2: Edit the page's Meta Tags



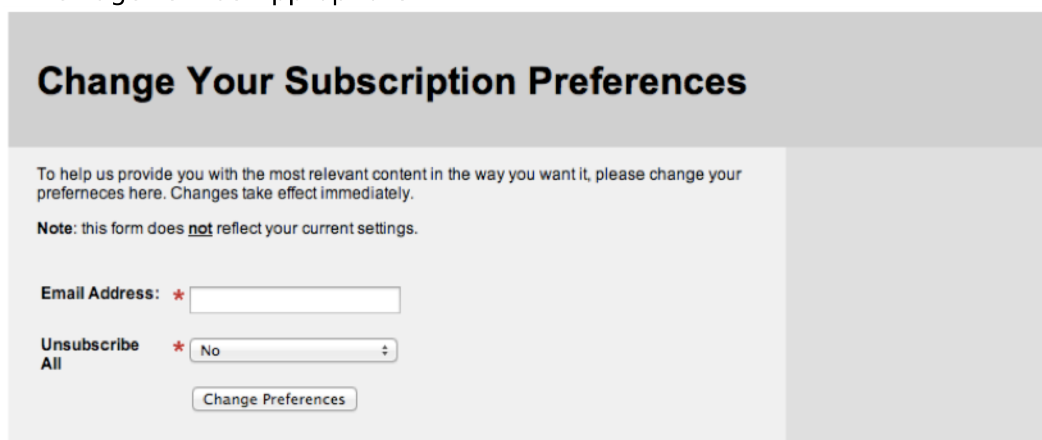
Step 3: Drag the Form into the Page

You can see what other people have done and adapt it to your business.



You can create a Thank You page first or return here after Step 7.

Step 4: Edit the Page Text as Appropriate



Step 5: Optional: show the Lead's current settings.

If you are using jQuery/SOAP API, you can show the user's current settings with the initial field settings. Since this is more of a general example, I do not show that here.

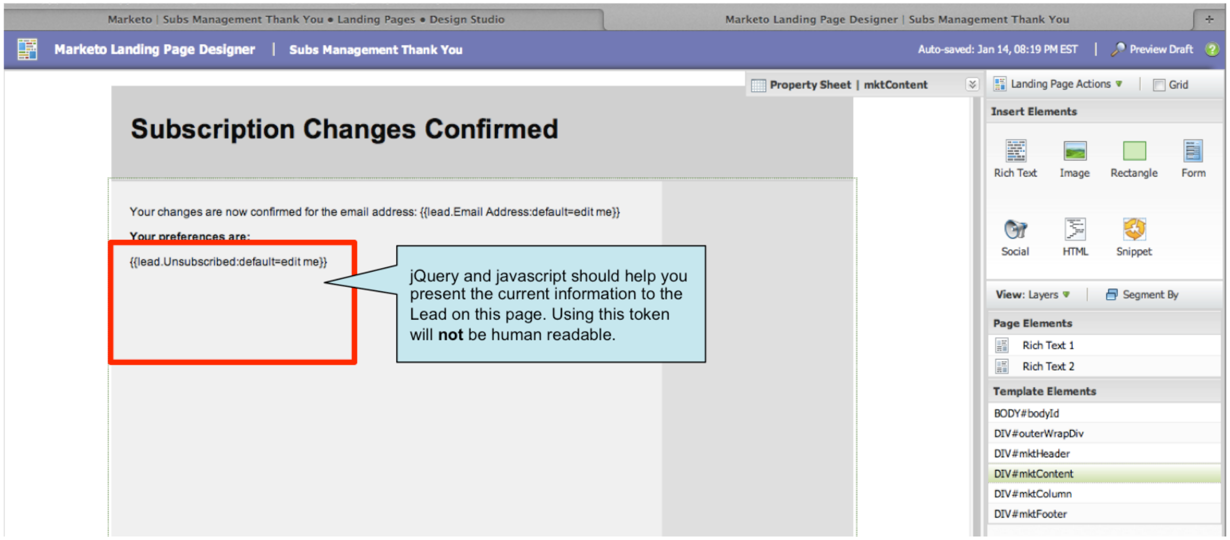
Step 6: Add the Subscription Management – Dev Form

Use `Stay on Page` for the moment.

Step 7: Create a New Page for the Thank You Page

Call this one `Subscription Management Thank You` with the URL slug "`subscription-changes-confirmed`"

Adjust the text or layout as appropriate.



You may have to return to the Subscription Management Page to adjust the Form's follow up page settings once this page is approved.

Step 8: Optional: Confirm the Lead's settings on Thank You Page

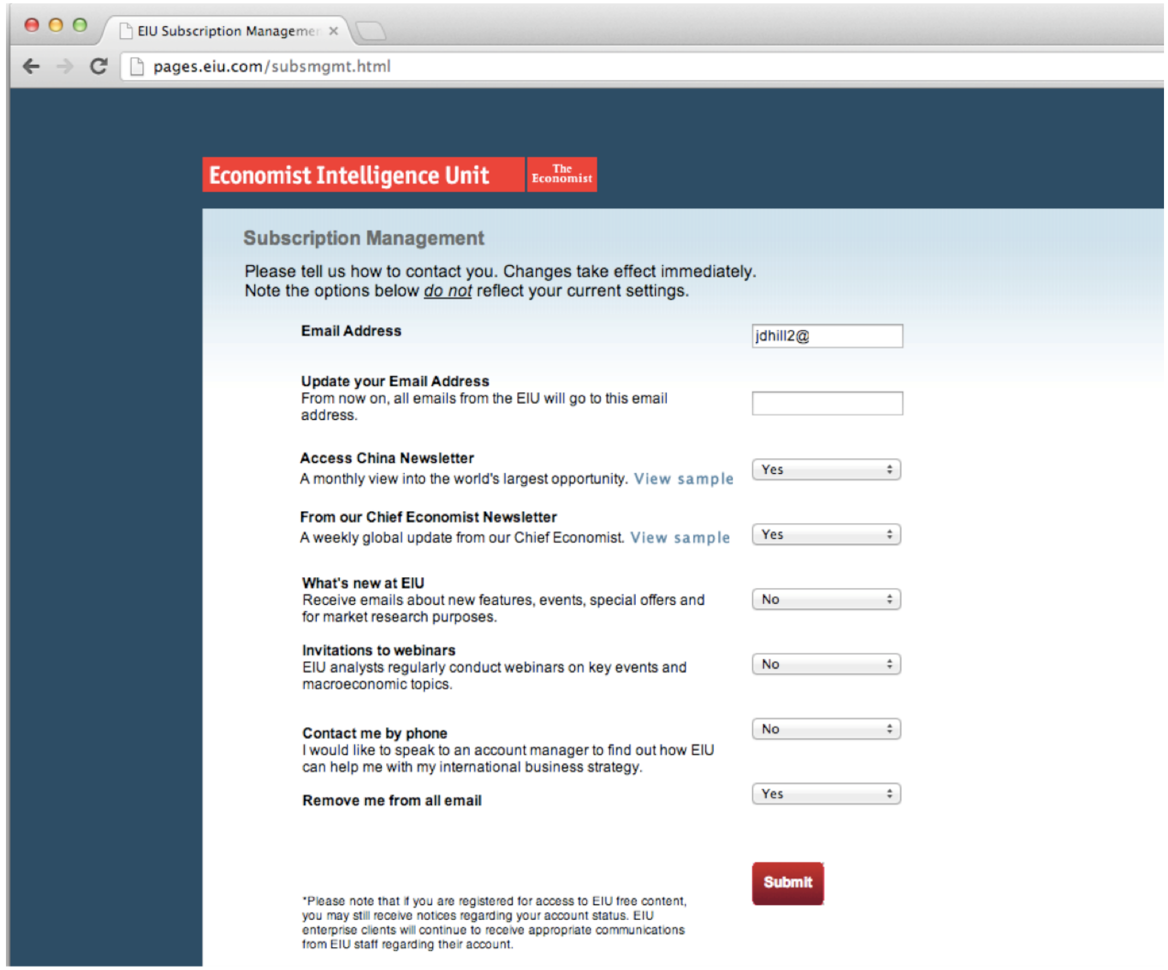
If you are using Yes, No fields or running a more complex jQuery integration, you can confirm the user's current settings in a human readable way. This token is here as an example only.

Step 9: Approve Both Pages

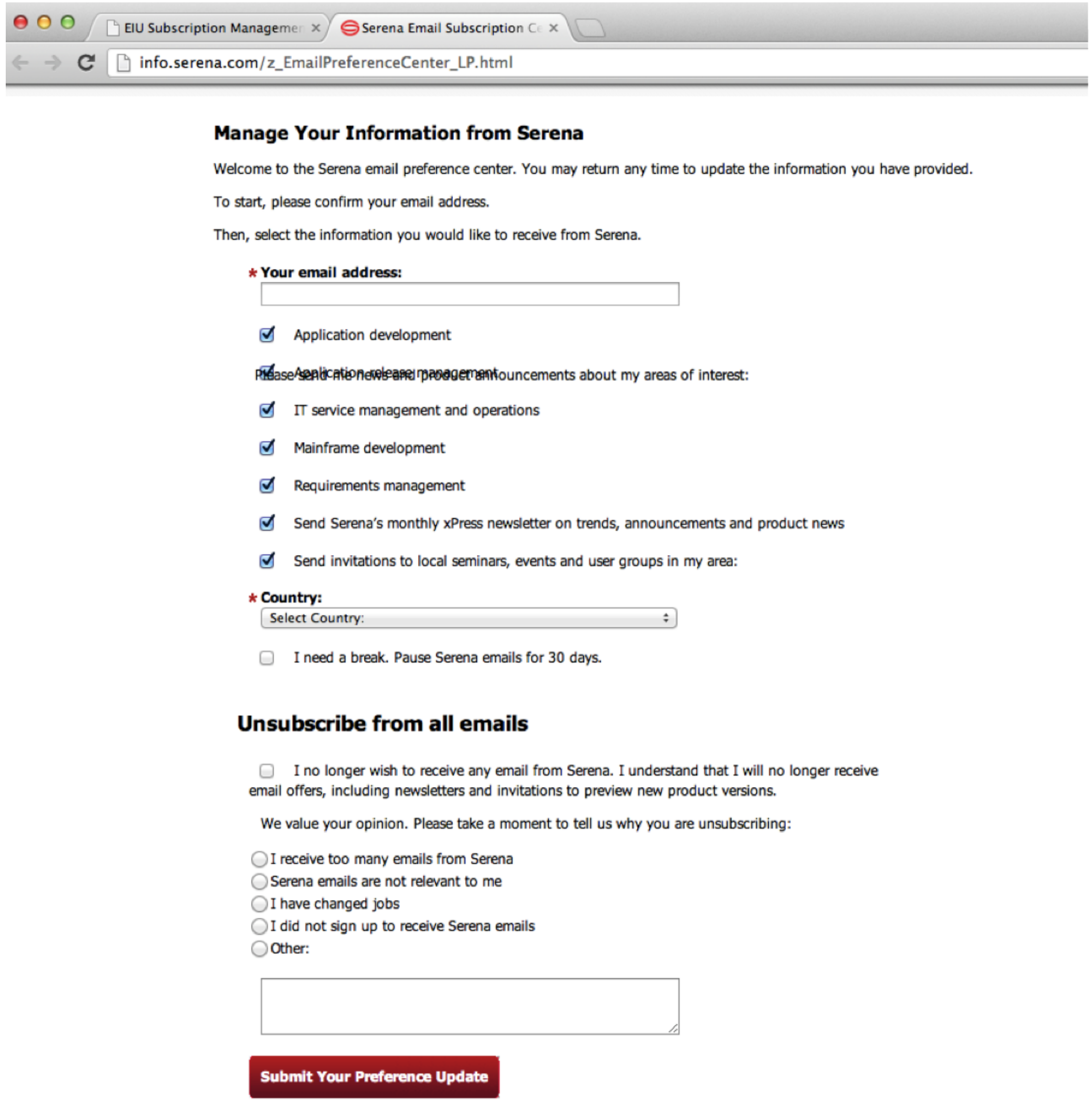
Before you can fully run the system, you will need to test it. I discuss that below.

Example Pages

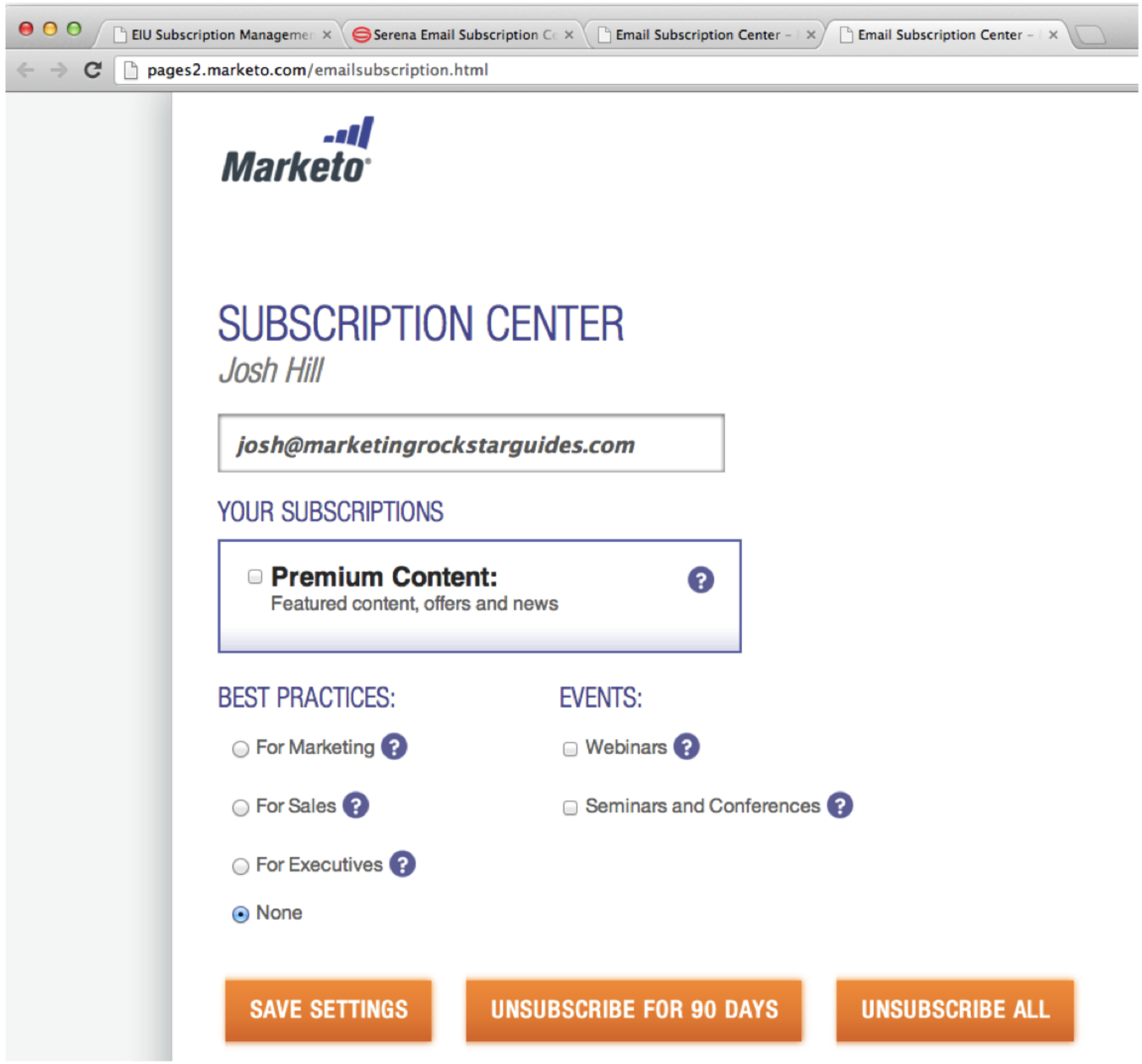
Here are links and screenshots of what a subscription page can look like, with business specific changes.



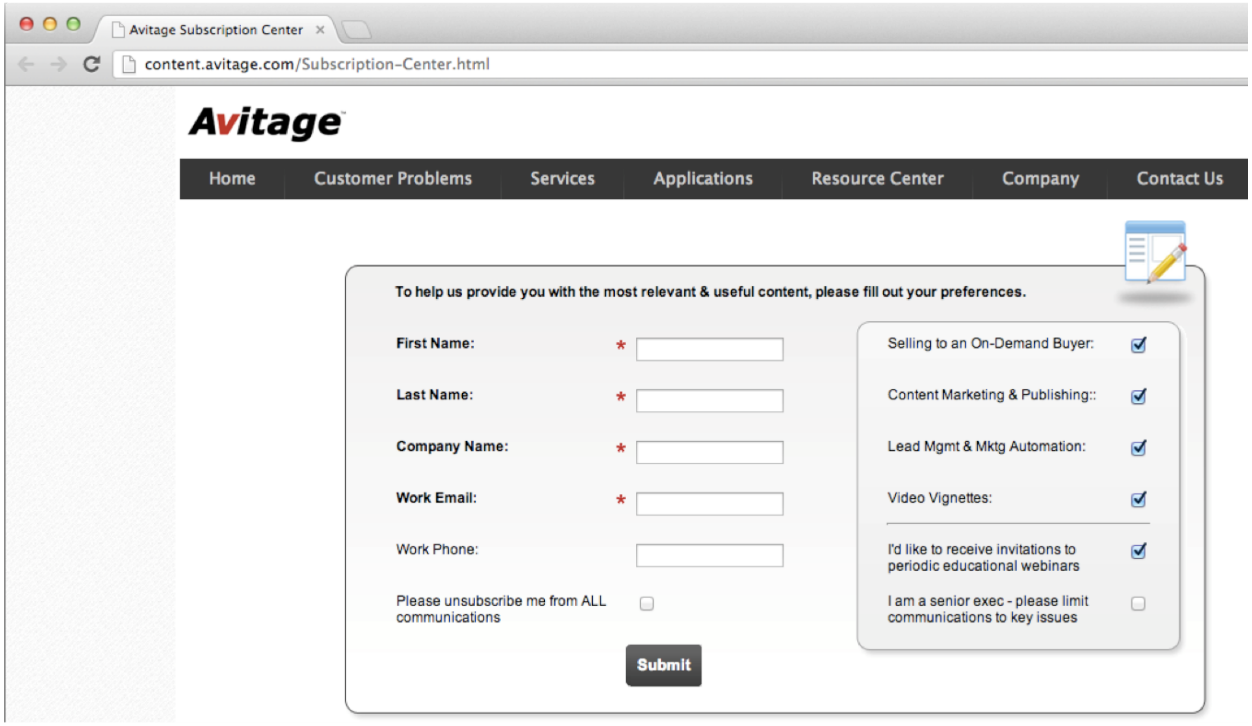
This is the EIU page I created in 2011 with a couple of new options, including changing your email address. (May require some jQuery to add the updater).



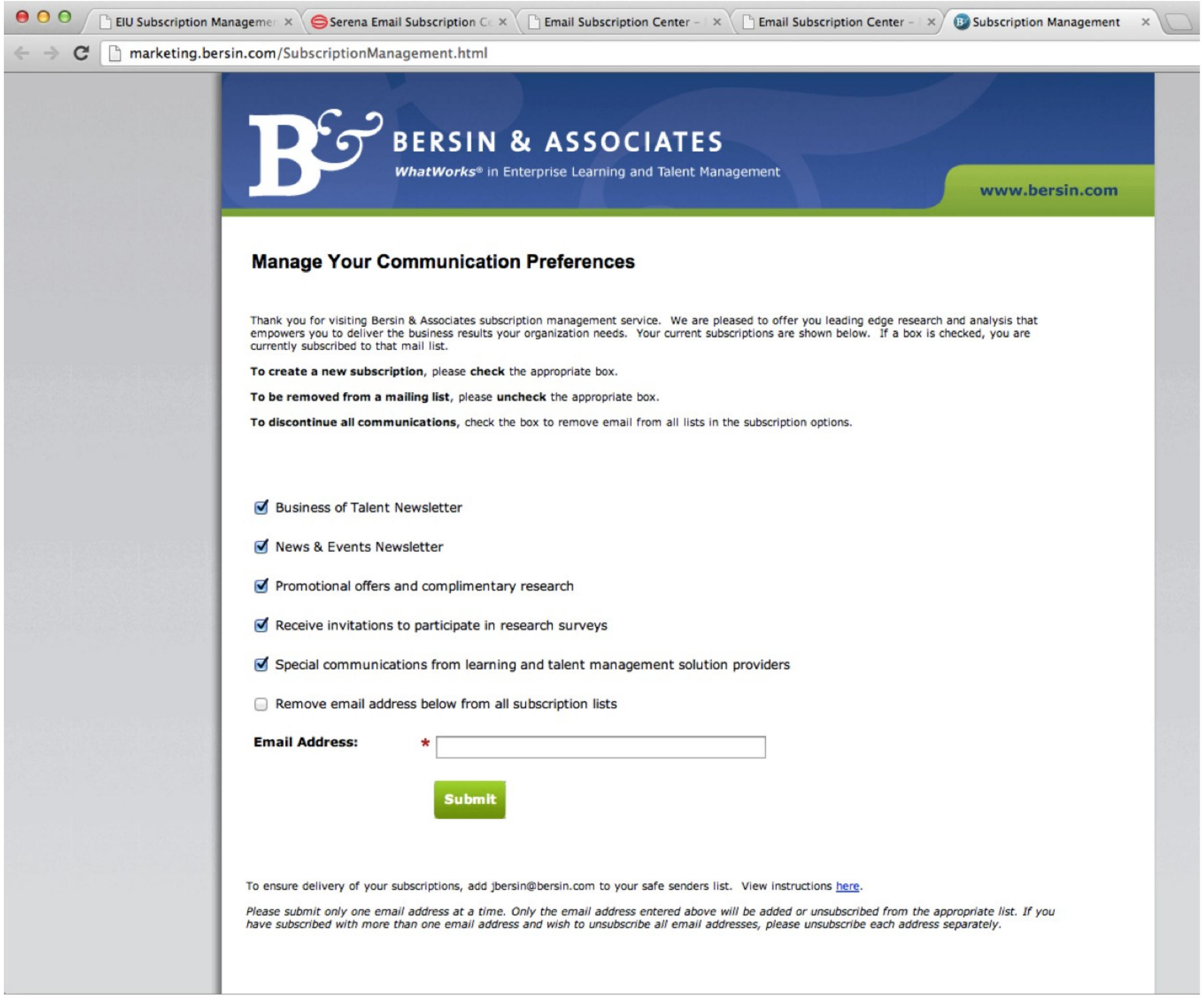
Serena.com allows several options including Marketing Suspend; Reasons for Unsubscribing; and topic channels.


EIU Subscription Manageme
Serena Email Subscription C
Email Subscription Center
Email Subscription Center
pages2.marketo.com/emailsubscription.html
Marketo
SUBSCRIPTION CENTER
Josh Hill
josh@marketingrockstarguides.com
YOUR SUBSCRIPTIONS
Premium Content:
Featured content, offers and news
BEST PRACTICES:
For Marketing
For Sales
For Executives
None
EVENTS:
Webinars
Seminars and Conferences
SAVE SETTINGS
UNSUBSCRIBE FOR 90 DAYS
UNSUBSCRIBE ALL

Marketo's famous Subscription Center. They use jQuery and munchkin to pre-fill your email address. Unfortunately, it forces you to the email address the original email was sent to. Note how they use custom buttons to do Marketing Suspend or Unsubscribe All.



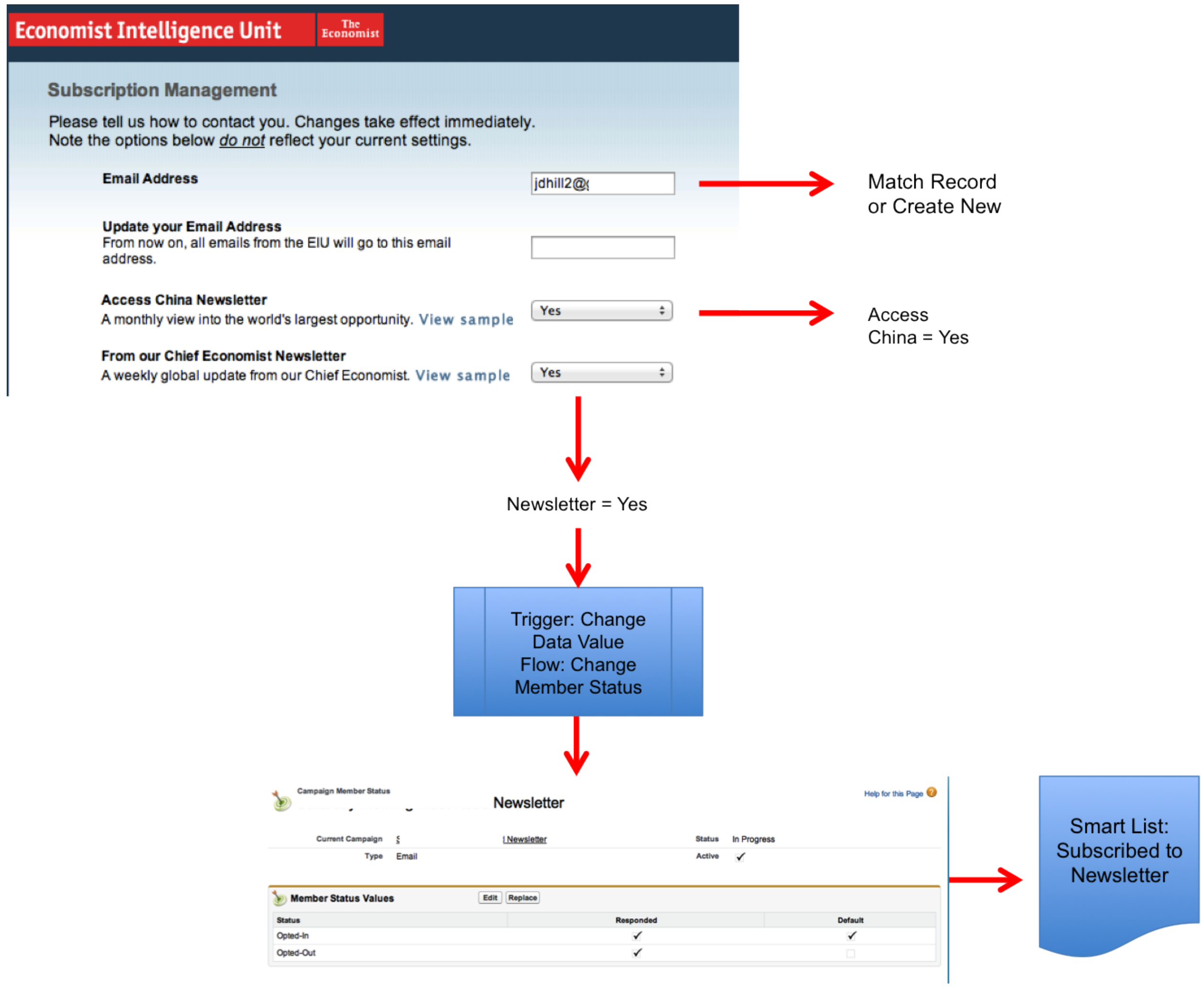
Avitage is a content marketing consultancy, so their center also reflects topical communications.



Bersin & Associates is a content producer so their choices range from promotion to participation in projects. In some countries, however, it is not legal to pre-check the opt-in option. I also disagree with this method because it makes some assumptions instead of giving choice—and control—to the customer. Would you want someone to do that to you?

Subscription Management Workflow

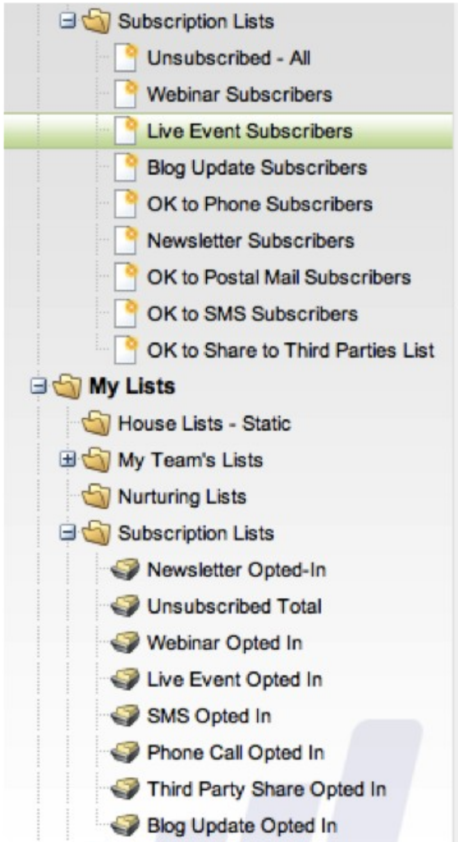
This is an example subscription management system you can use as a starting point. This workflow assumes you are using my SFDC Campaign>Field>List System. Feel free to use a workflow that works for your business.



Smart List and Auto Static List Setup

Caution: Marketo will automatically block invalid and unsubscribed emails, however, it will still send previous bounces.

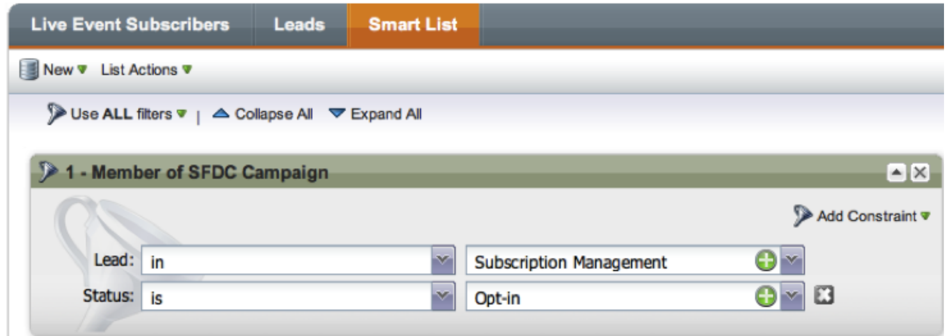
To drive the system and the ability to use the data for campaigns, you will need to setup several Smart Lists and Static Lists corresponding to each channel’s field or `SFDC Campaign Member Status`. This way you can reference a list like `Newsletter Opted In`, knowing that you will only target opted-in people.



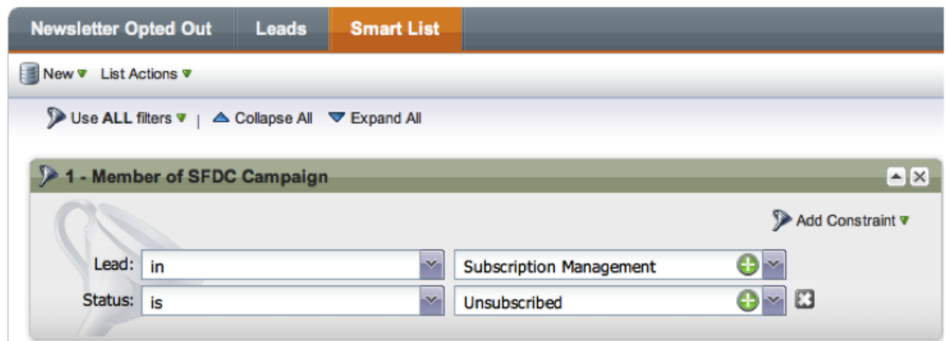
Creating Smart Lists

For the Smart Lists you will use the SFDC Campaign Member Status because that is the best way to record the current value over time. You could base the Smart Lists on the field values as well. I recommend SFDC Campaign Member Status for this system.

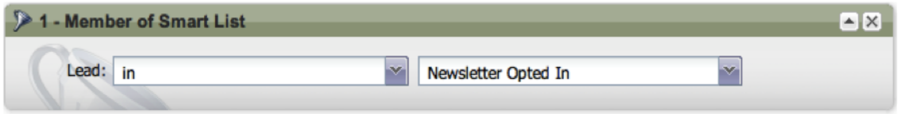
This shows the opted-in Leads for the `Live Event` emails.

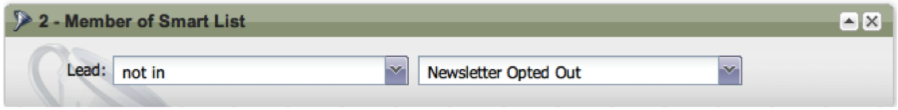


For `Newsletter Opted Out` Leads, use this filter:



When you run a campaign to send the Newsletter out, I recommend the following filters set to ALL. This will ensure that you only send to Opted In people and any opt outs are definitely excluded.





You can also include a filter to exclude any Leads in your `Suppression List`:

`Member of List NOT IN "Suppression List"`

Where your `Suppression List` would include other lists or filters such as:

- Competitors
- Email Invalid = True
- Unsubscribed = True
- Bad Emails
- Lead Status = Trash
- Marketing Suspended = True
- Students

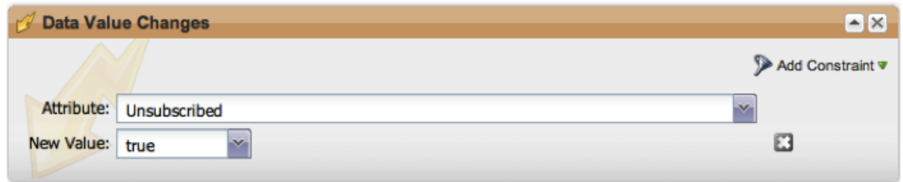
Static List Generator Campaign

You can create one or more Static List Generators if you aren't using Segmentations. These campaigns listen for changes on a field and automatically Add to List or Remove from List Leads who qualify. These steps assume you've created the Static Lists above.

Step 1: Create a New Campaign

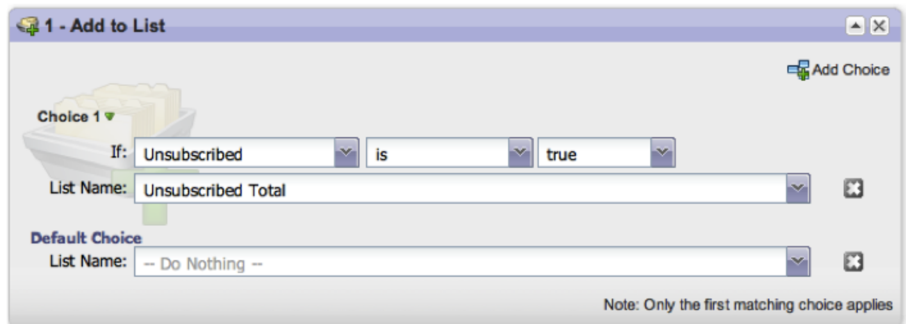
Call it `Unsubscribed List`

Step 2: Smart List: Trigger Data Value Changes

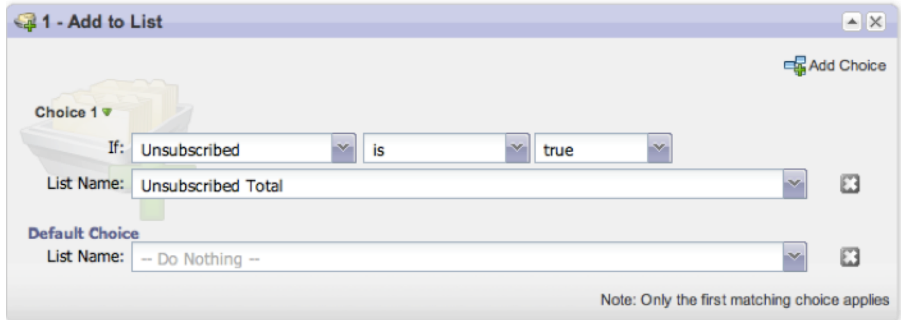


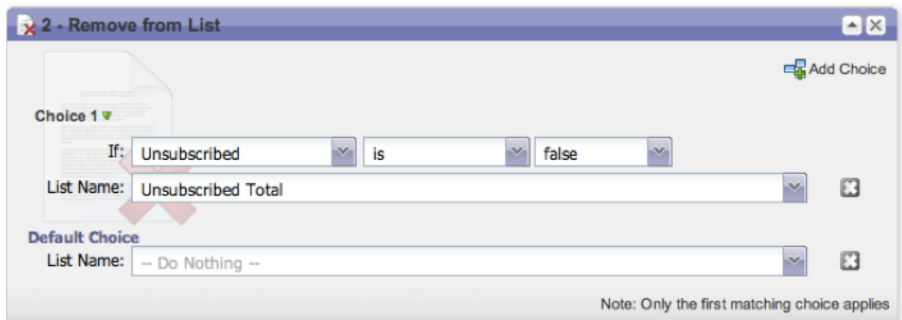
Note: you could just used `Unsubscribed` here as long as your Flow handles both `False` and `True` options.

Step 3: Flow: Add to List: Unsubscribed Total



For a single flow system, use the following two steps:

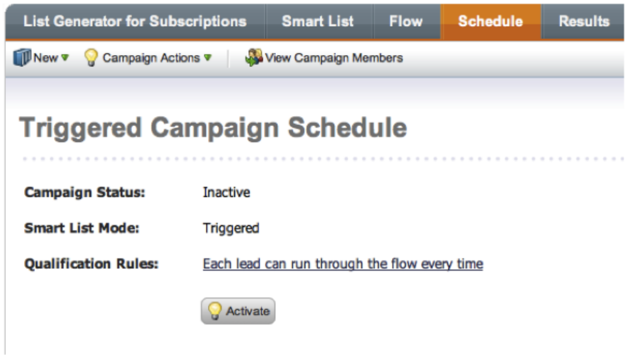




Placing these two steps together will reduce the number of campaigns.

Step 4: Schedule: Activate

`Qualification Rule:` Every Time because we want this to `Add to List` any time a Lead becomes `Unsubscribed`.



You should also create a mirror campaign which removes the Lead from the Unsubscribed List anytime they become `Unsubscribed=False`.

SFDC Campaign Updater Campaign

The key engine behind your Subscription Management system is the triggered campaign, which we will call "Subs Management Preference Changer." This campaign will listen for value changes or Fills Out Form to activate the change in SFDC Campaign Member Status necessary for the system to work.

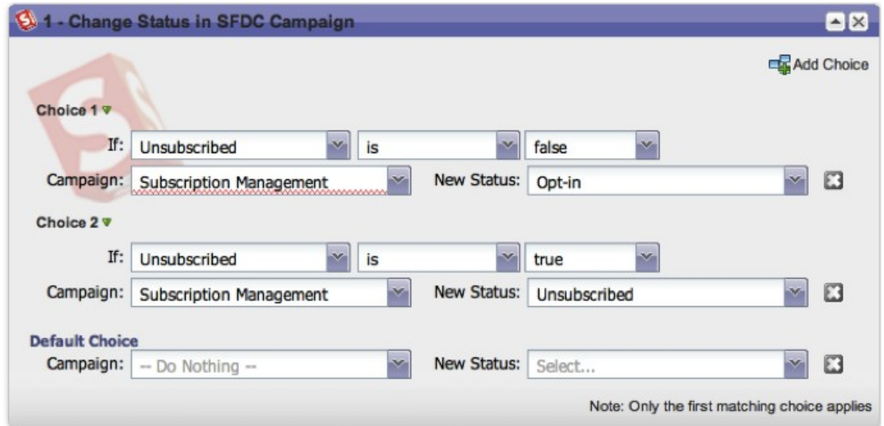
Step 1: Create a new campaign called Subs Management Preference Center

Step 2: Smart List: Data Value Changes

Bring in each field value you use on the Form. We want to listen for changes of the field value because such changes could happen from the Form or from Salesforce. Either way, we then need to adjust the SFDC Campaign Member Status to record the movement.

Step 3: Flow

Your Flow could look something like this, with a Change Status in SFDC Campaign for each Subscription.



If you want to send a confirmation email, you should do that in a separate campaign otherwise *any change from any source* will activate the email, which will be awkward if the Lead did not change things using the Form, e.g.: if you changed their field in SFDC.

Step 4: Schedule: Activate

`Qualification Rule: Every Time.`

The Confirmation Email

You can also add a campaign that sends a confirmation email after each change to someone's record. Personally, I find this highly irritating, especially when I just unsubscribed. Thus, I do not recommend adding a step, however you can do so, including adding the current preferences in an email using tokens.

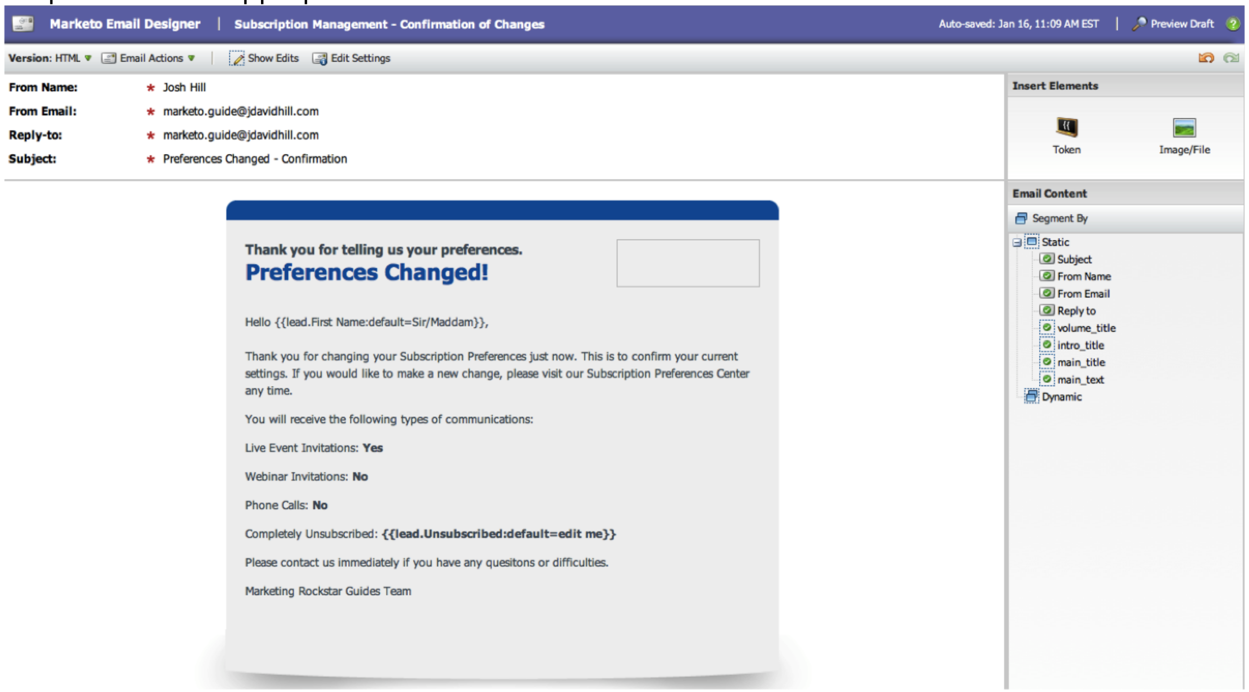
Email Setup – The Tokens

Using Tokens here requires your fields to use human readable values like Yes or No. If you are using dynamic content, you can also use any type of field if you setup the various permutations of text.

Step 1: Create an Email in Design Studio

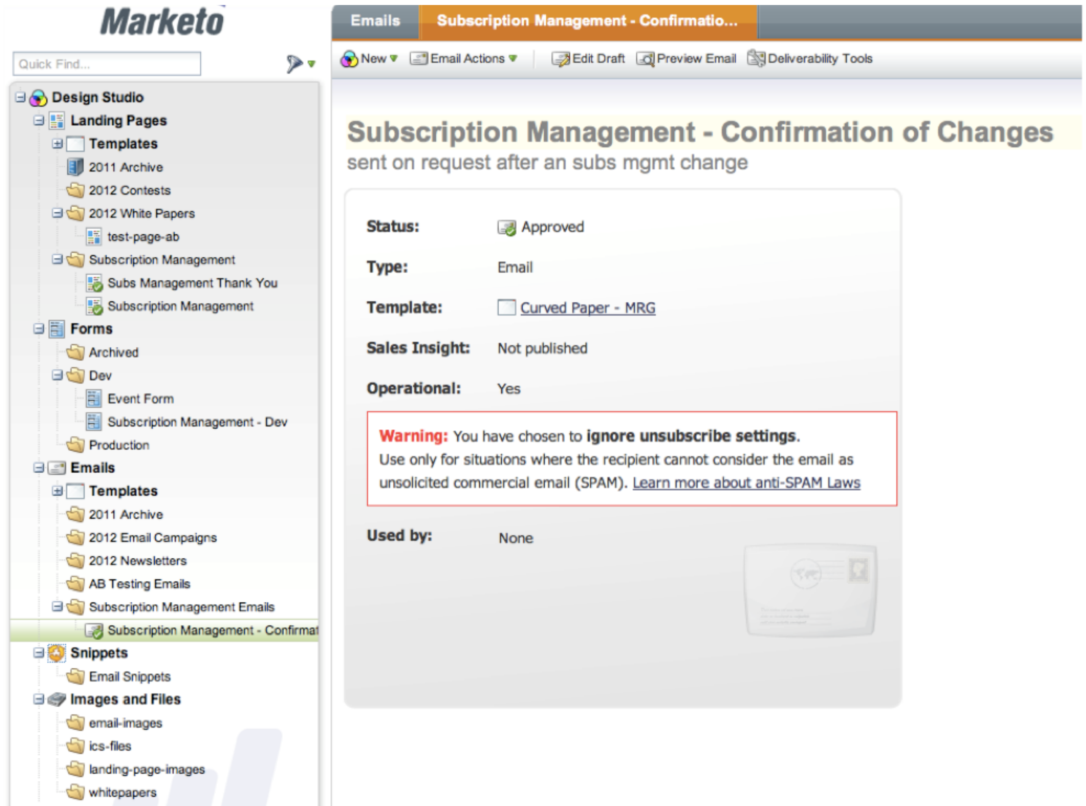
Call it `Subscription Management – Confirmation of Changes`

Step 2: Add the Appropriate Text and Tokens

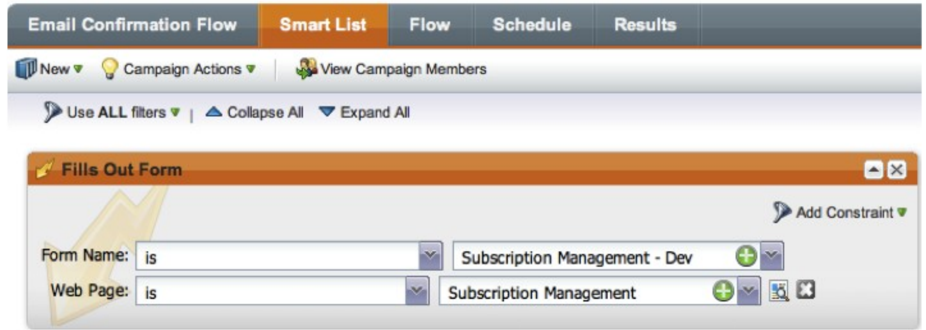


Step 3: Create a new campaign

Call it `Email Confirmation Flow`



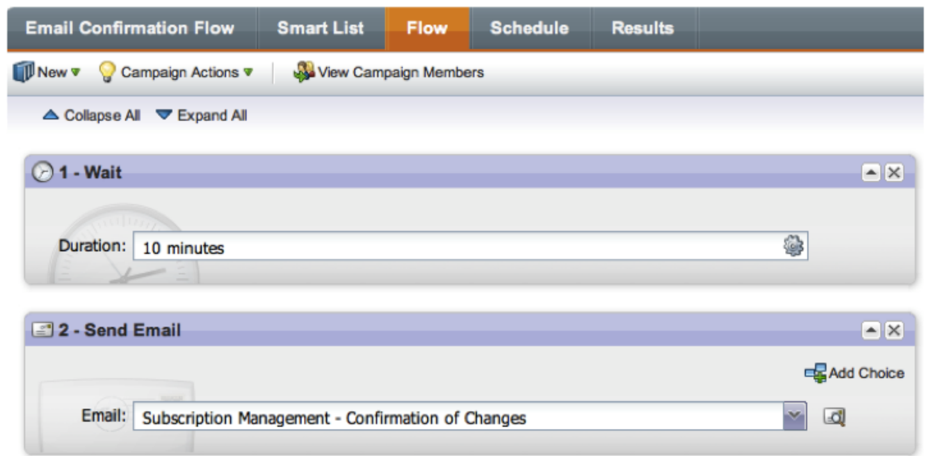
Step 4: Smart List: Fills Out Form



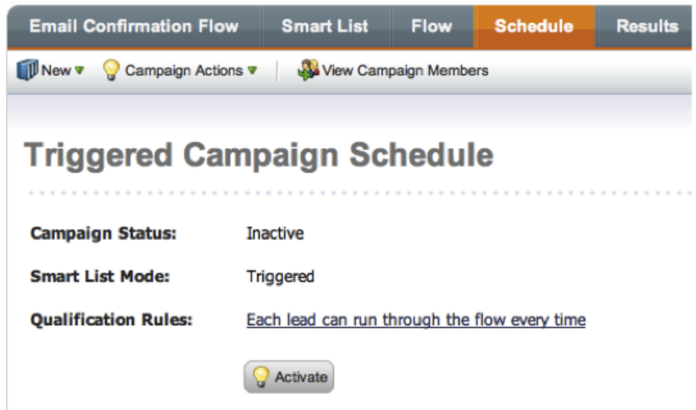
Step 5: Flow

`Wait 10 minutes` is designed to ensure the sync and other settings from `Subs Management Preferences Changer` are completed.

Send the Email we created in Step 1.



Step 6: Schedule: Activate
Qualification Rule: Every Time.



Additional Tips and Tricks

Multiple Brand Subscription Management

Generally you can do this using the steps above to create the appropriate brand or business unit fields in Marketo. If you use Segmentations and Snippets, you should be able to adjust an email's footer very easily.

There is an alternative method, which Marketo suggested at one point.

Opt In Methods

As described in Marketo's "Don't Let them Unsubscribe Webinar", you have two Opt In methods: Single and Double. Marketo recommends using the Double, which many pro-bloggers do to ensure they have only the most engaged audience.

Single Opt In

The Single opt-in method is the easiest to implement and likely covers all legal requirements. If a lead submits your form with the opt-in checked to `Yes`, that is a single step opt in. The drawback is a lead may have mistyped the email, causing you to have higher bounces, or they may not personally have entered the form, leading them to unsubscribe or spam filter you later.

Double Opt-In

The double opt-in method sends a confirmation email and confirmation link step to the lead after the first step:

1. Lead submits preferences form (Single Opt In)
2. Marketo sends an email with a confirmation link to the address provided.
3. The lead clicks on the link, confirming they've received the email successfully and confirms their preferences.
4. You now know you have a confirmed and active email address.

The steps below assume you made a simple CTA to sign up for a newsletter, requiring a single field change. You could also do this with the multiple subscriptions, however, you will only confirm the change, rather than adjust fields.

This process assumes that new leads start out with Unsubscribed = True until they have taken an action to change their preference.

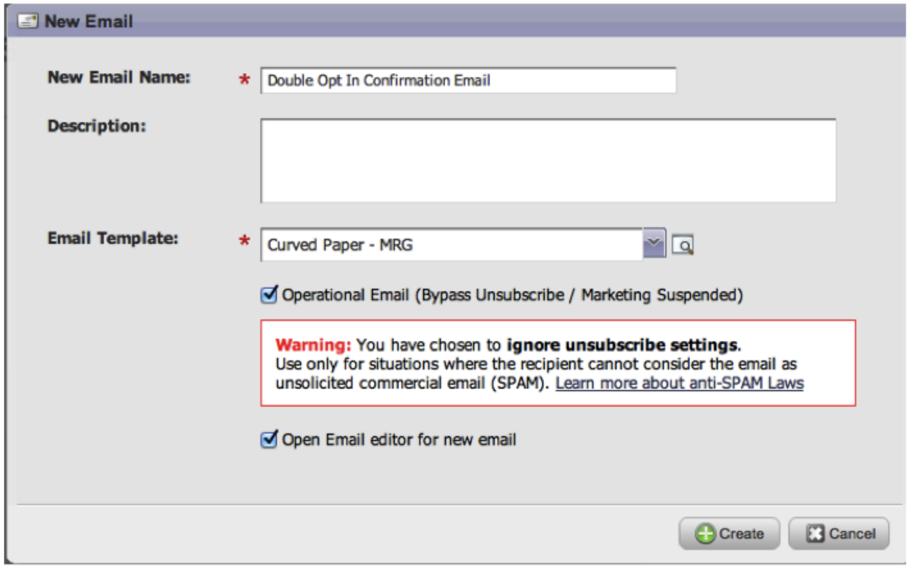
Step 2: Create a Confirmation Email

Call this `Double Opt In Confirmation Email`

You will place one or two links:

Link 1: Confirmation Link to Page in Step 2.

Link 2: Unsubscribe Link to the Unsubscribe Page.



Because the person is expecting our confirmation email as part of the process, you should set this to `Operational Email`.

Step 3: Create a Confirmation Landing Page

Call this in Marketo: `Double Opt In Confirmation Page`

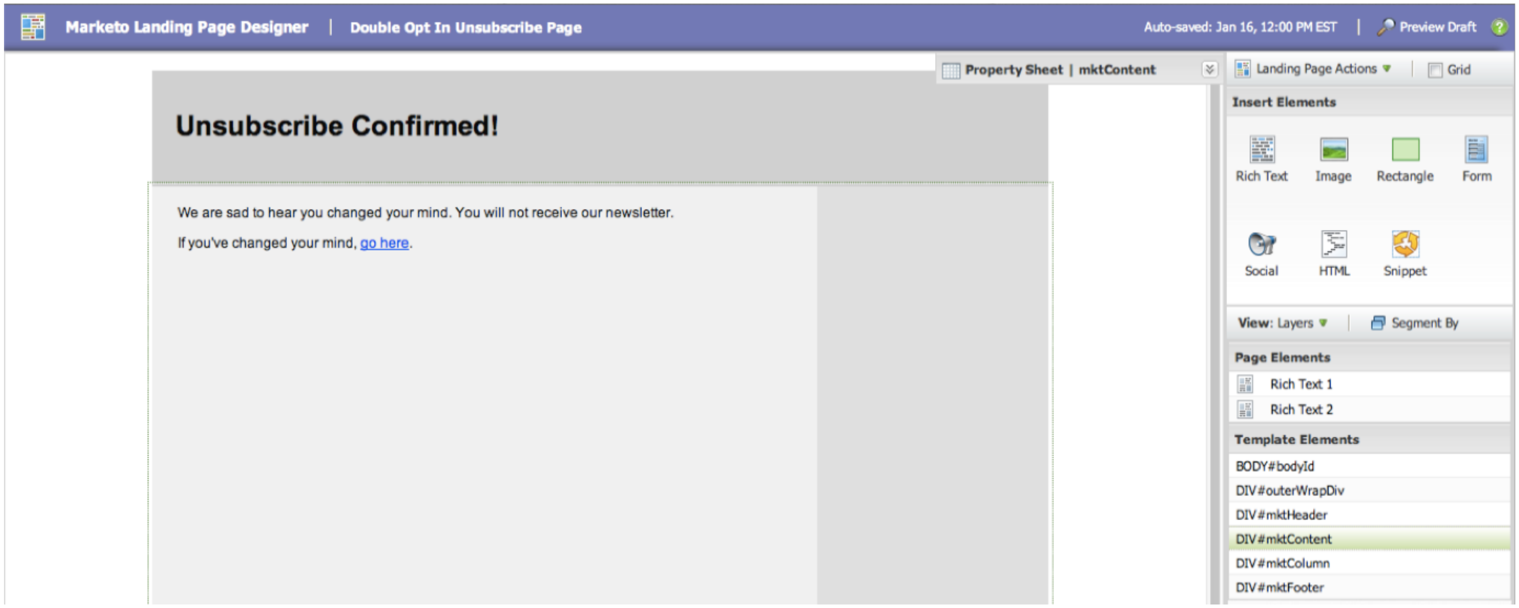
URL Slug: `confirmation-of-subscription`

Step 4: Create an Unsubscribed Landing Page

This will be a second link in the email.

Call this in Marketo: `Double Opt In Unsubscribe Page`

URL Slug: `unsubscribe-from-email`

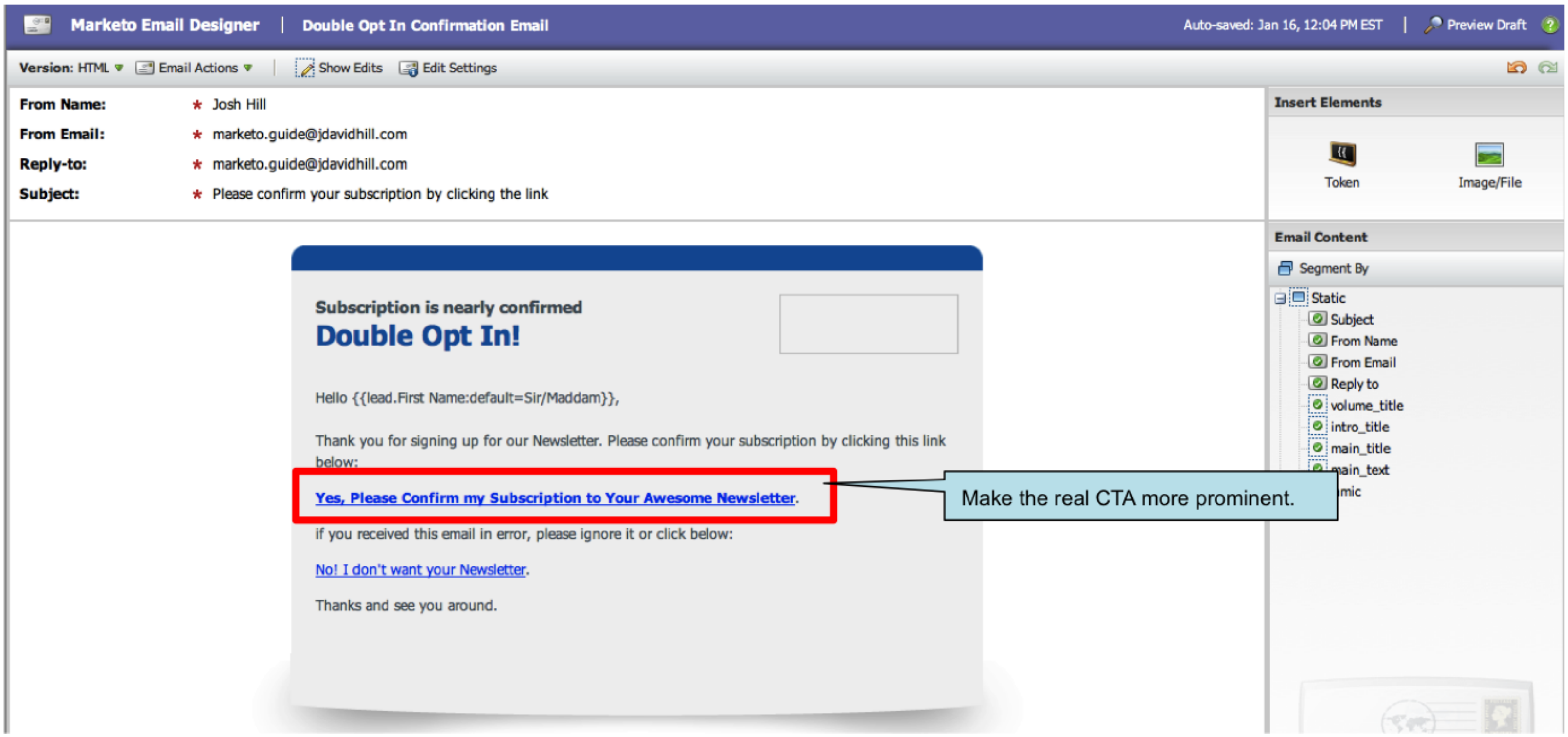


Step 5: Update the email with the appropriate links.

The email is operational, so you could consider using a generic email address like

From Name: `My Company`

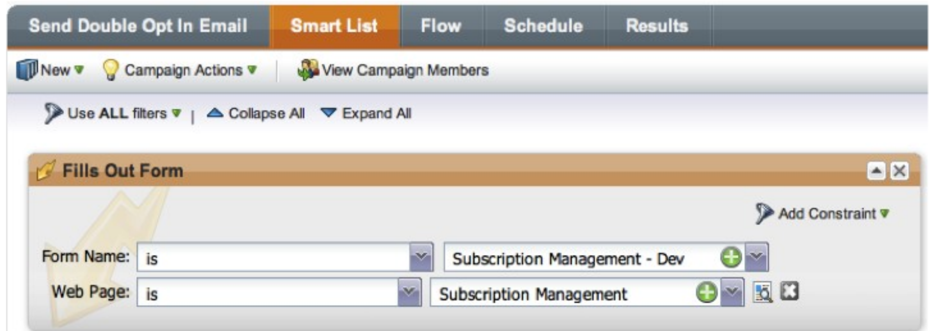
From Address: `donotreply-confirmations@mycompany.com`



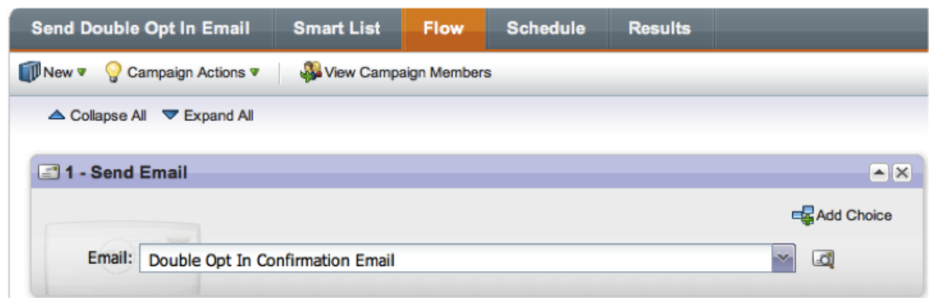
Step 6: Create a New Campaign to Send the Confirmation Email

Call this `Send Double Opt In Email`

Smart List: `Fills Out Form IS "Subscription Management Form" on Web Page "Subscription Management"`



Flow: `Send Email "Double Opt in Confirmation Email"`



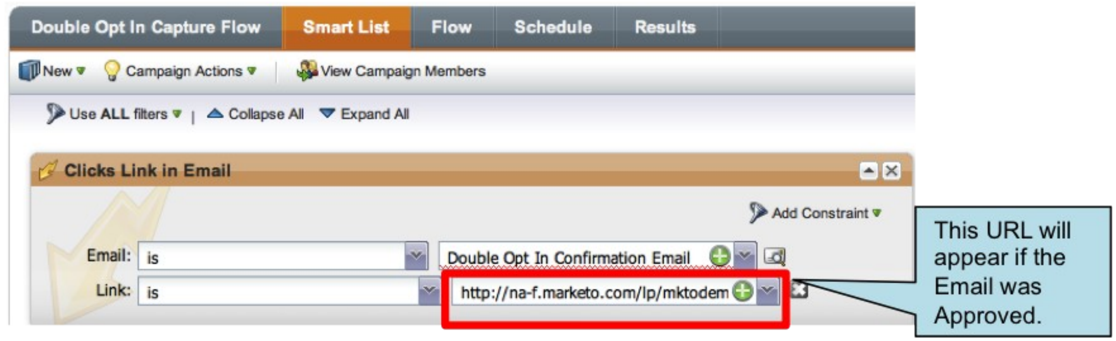
Schedule: `Trigger Activate Every Time`

Step 7: Create a New Campaign to Capture Confirmations

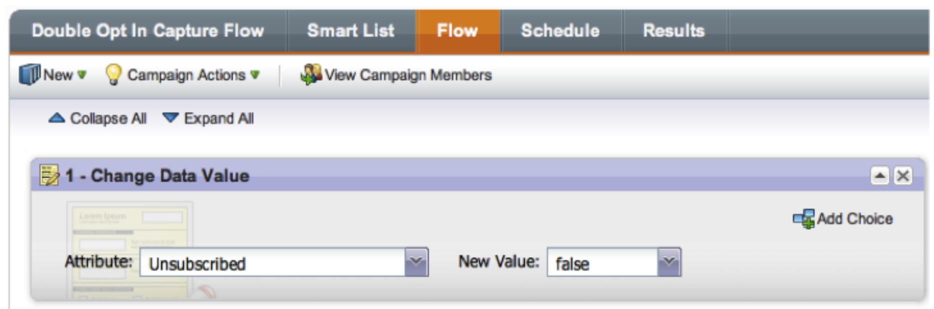
This campaign will listen for the `Clicks Link in Email` activity so Marketo knows the Lead has confirmed their subscription.

Call it `Double Opt In Capture Flow`

Smart List: `Clicks in Link Email`



Flow: Change Data Value to the opted-in value. Choose the field(s) appropriate for your system.



Schedule: Triggered Activate: Run Every Time.

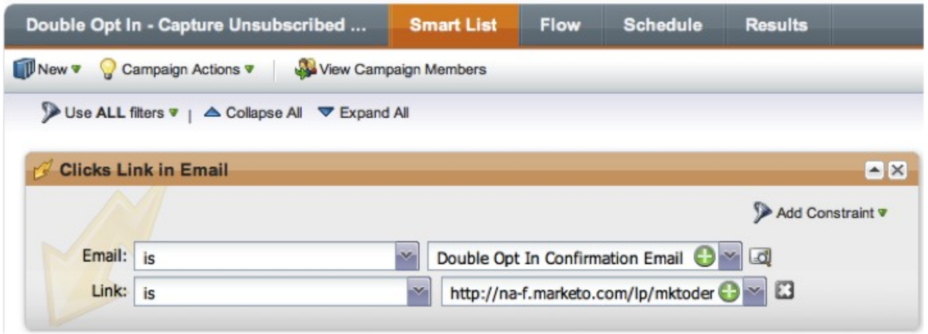
Step 8: Create a New Campaign to Capture Unsubscribers

You will also give people the option to actively unsubscribe from the `Double Opt In Email`. This campaign will capture that action as well.

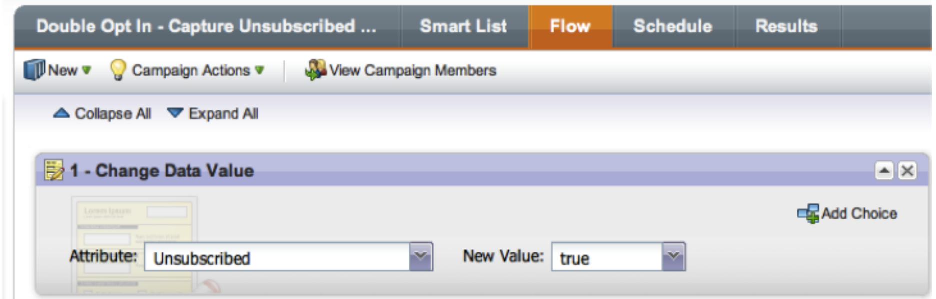
Call it `Double Opt In – Capture Unsubscribed Link Flow`

Smart List: Fills Out Form

Be sure to select the *unsubscribe link!*



Flow: Change Data Value – since they unsubscribed or ignored our request, they get set to Opted Out.



Schedule: Triggered Activate: Run Every Time.

Customizing Your Email Footer

A common Marketo question is "How do I modify the unsubscribe footer?" There are three main ways to manage your footer options to comply with the law, your contract, and to help your leads. The options are: `Admin>Email Settings`; Snippets or Segmentations; or Multiple Templates.

Admin > Email Settings

This is easily done through `Admin>Email`. You, or a Marketo Admin, should be very careful with these modifications as they are immediate once you press Save. I recommend taking the following steps.

Step 1: Decide on the layout for the html and text

Type these in one file or have your designer help you with the html. Remember the text must say something like:

`To Unsubscribe, please go to: http://info.mycompany.com/example.html`

For your new subscription management page, you might say

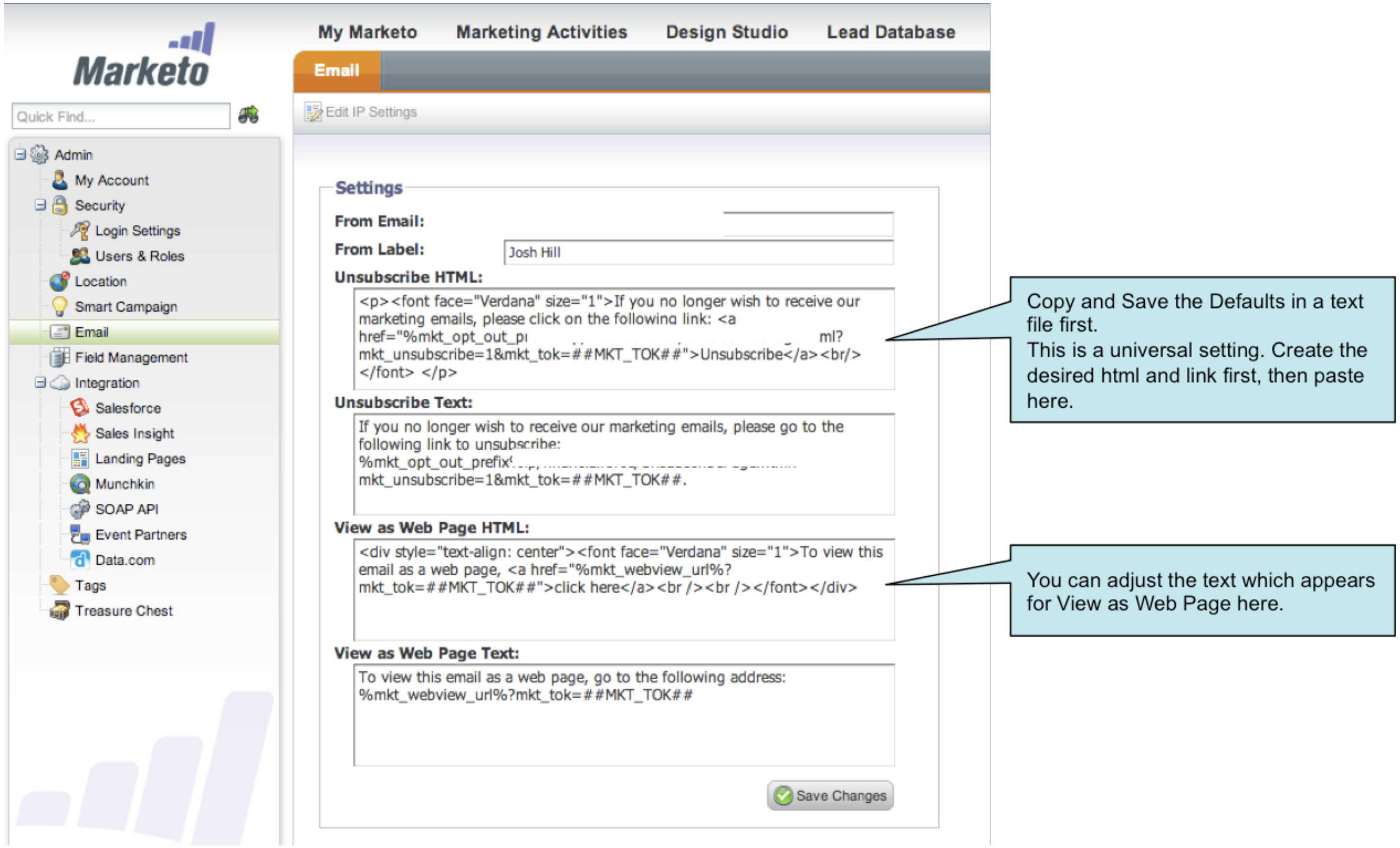
`Please Manage Your Subscription` [hyperlink]

or

`Please manage your subscription here: or Unsubscribe immediately here:`

Step 2: Copy the current text and html to a file for safekeeping.

The defaults are not easy to restore, so copy the defaults to a text file someplace.



Step 3: Copy the new text and html into each box

If you are inserting a customized link that you prefer to insert on the Email Template, you must leave the Unsubscribe boxes empty. But then place in a single character because there must be some text in both boxes. I recommend a period in both. For the HTML version, you can color the period white or another color using `<FONT COLOR="#FFFFFF">.</FONT>`

Step 4: Press Save

Step 5: Send out a test email to verify the links work.

Step 6: Test the system with a test lead.

Using Snippets or Segmentations

You can also use Snippets or Segmentations to provide a Subscription Management page in different languages or addresses to different regions. Follow these directions and use the Footer text and Subscription Management page URL(s) as desired.

Using Multiple Templates

Similar to Snippets, you can develop multiple hard coded email templates with appropriate language, addresses, and URLs for each region or segment.

Embed Field Tokens on the Email Template

Adam Waterson developed this version where he solves a multi-language footer issue using a few well-chosen `String` fields.

Step 1: Create Custom Fields Using the Field Manager

You could call one `Business Unit Address` and the `other Business Unit Unsubscribe Link`.

Step 2: Place the Tokens into the Email Template

`{{lead.Business Unit Unsubscribe Link}}` and `{{lead.Business Unit Address}}`

Step 3: Create a New Campaign "Footer Text Changer"

You will run this initially as a batch.

Use `Change Data Value` with Choices to insert the correct `Business Unit Address` text.

Use `Change Data Value` with Choices to insert the correct `Business Unit Unsubscribe` HTML. (it is ok to copy and paste html from text here).

Step 4: Run the campaign to add the values to all the Leads.

Step 5: Test the Emails at this point.

Step 6: Clone this campaign.

Step 7: Adjust the Smart Lists to Use Data Value Changes for each field.

This will ensure that new Leads and changes to Leads will be reflected.

Schedule: Every time.

Activate.

Chapter Review

Self-Quiz

Why should you use Subscription Managemnet instead of the standard Unsubscribe page?

____

What other methods could you use to manage subscriptions with Marketo?

____

How do you keep track of currently subscribed vs. previously subscribed Leads?

____

____

Recommended Resources

Marketo Documentation

Email Deliverability Center

EU Privacy Law Discussion

EU Privacy FAQ 2011

Improving Reputation

Ultimate Deliverability FAQ and Webinar – discusses techniques and subscription management

Killer Deliverability – 2012 by Autumn Tyr-Salvia

Handling Multiple Brand Subscriptions

The Original Don't Let them Unsubscribe Webinar

Creating a Double Opt-In System

Marketo Community

Country Custom Footer Links

Email Deliverability Summary [LinkedIn]

Avoid Operational Emails

Subscription re-subscribe emails

EU Privacy and Opt Ins

Longer Discussion on EU Privacy

Adjusting the footer in different situations with tokens

Subscription Marketing implementation debate *remember to seek legal counsel in your jurisdiction regarding necessary regulations and process.

Tools

Email Marketing Questions Answered [HubSpot] – includes benchmarks!

SenderScore

ReturnPath

DNSStuff.com – allows you to search blacklists and test your IP or domains.

HubSpot's Subscription Management Center Review

Example Pages

http://pages.eiu.com/subsmgmt.html

http://info.serena.com/z_EmailPreferenceCenter_LP.html

http://pages2.marketo.com/emailsubscription.html

http://content.avitage.com/Subscription-Center.html

http://marketing.bersin.com/SubscriptionManagement.html

Chapter 18. Email Reputation Management

Chapter 19. How do I get into my prospect's inbox?

At a Glance

Table of Contents

Overview

The internet has a wealth of information on this topic ranging from email deliverability, reputation management, data cleanliness, spam filtering, email formatting, etc.

What you want to know is how do you manage all of these factors using Marketo. I am here to help. In this large section, we will cover as many aspects of reaching your audience via email as possible. In this Guide, we will refer to many of these topics when discussing How to Build Email Templates, How to Manage Your Database, Building House Smart Lists, and How to Run a Nurturing Campaign. As you can tell, email reputation is a central topic to using Marketo effectively to deliver revenue for your firm, while providing value to your customers.

There are three major components to building a good email reputation.

1. Create amazing content: invitations, calls-to-action that people want.
2. Only send emails to people who opted-in. Write and adhere to a clear subscription management process which everyone—including Sales—follows rigorously. Make this policy clear to your customers on every message and on your website.
3. Manage the technical side with automated cleaning alongside regular monitoring. Managing your system includes technical setup, monitoring deliverability by channel, and cleaning your data regularly.

Ah, but how do you do that? In this chapter we will go through how Marketo can be used to get closer to email deliverability nirvana. Ultimately, reputation management comes down to the Golden Rule. Ask the following questions for every email:

Note: if you ever say "No" to any of these questions, go back to the white board.

"Would you want someone to send this to you in the same situation?"

"Would you open this if it were sent to you?"

"Would I opt-in to this email if asked?"

"Would I like it if someone did not allow me to opt-in or opt-out?"

Creating Great Content

This guide is not meant to help you write well. (Sorry!) But I do want to point out what you can do to get in someone's inbox, get your target to open the email, and then to click on the link. There is quite a bit of data out there on this, including in your own system. In fact, use Marketo's reports to check your own data first. Each firm has its own voice and segmented audiences who react slightly differently to copy, timing, and layout. The summary of timing and copy below is meant to point out ideas for testing. Of course, if you are happy with what you are doing, skip to the next section.

According to HubSpot's Science of Email Marketing data (and yes, that URL is misspelled by them), the most clicked on subject lines contained the following words. And I bet we have all used them in emails.

Type of Email	Most Clicked Subject Lines	Least Clicked
Nurturing	Secrets, e-sales, awesome	Evaluation, soon, administration
All Emails	Posts, jobs, survey	

Abuse, or spam flagged words included "confirm", " features," "upgrade," and "offer." The message here is to be helpful up front, especially as filtering and mobile viewers become predominant. To avoid spam filters, use spam words sparingly or not at all. As ReturnPath notes, focus on your marketing first, then test your email in a service such as SpamAssassin.

Marketo's deliverability expert, Autumn Tyr-Salvia reminded me that creating images with just text, or "text with images" is a bad idea. Image blockers and spam filter can tell if you are doing this and are more likely to market such emails as spam. If you want to use text headers or more colors, simply do so because the text will be visible to the reader instantly instead of a blank box.

Additional tips include making your copy and design passionate, personal, and exclusive. Leverage Cialdini's *Influence*! The data shows that using these factors in both copy and layout will increase your Opens and CTR.

In spite of the difficulties with images and html in email viewers, HubSpot reports 65% of survey respondents want visual emails. Further data shows more links are better, even if you only have one CTA. I believe this is because people want to see more information on your firm or request, even if they don't click on all of the links.

Share Content at the Right Times

In terms of timing, your newest subscribers are best, just as calling a lead back in less than an hour makes a huge difference in closing a deal later. HubSpot's data also is showing new trends in open rates on the weekends and higher unsubscribe rates on Tuesdays. This data seems to indicate the Tuesday, Wednesday, Thursday routine is breaking down with people cleaning up email on Tuesdays, while taking the time to read your content after work. The data also shows early morning emails are better at attracting attention from commuters.

*I know this is a Marketo User Guide. HubSpot produces some amazingly valuable content that is intended for helpfulness and for sharing. Take some lesson from their team and then leverage Marketo for results.

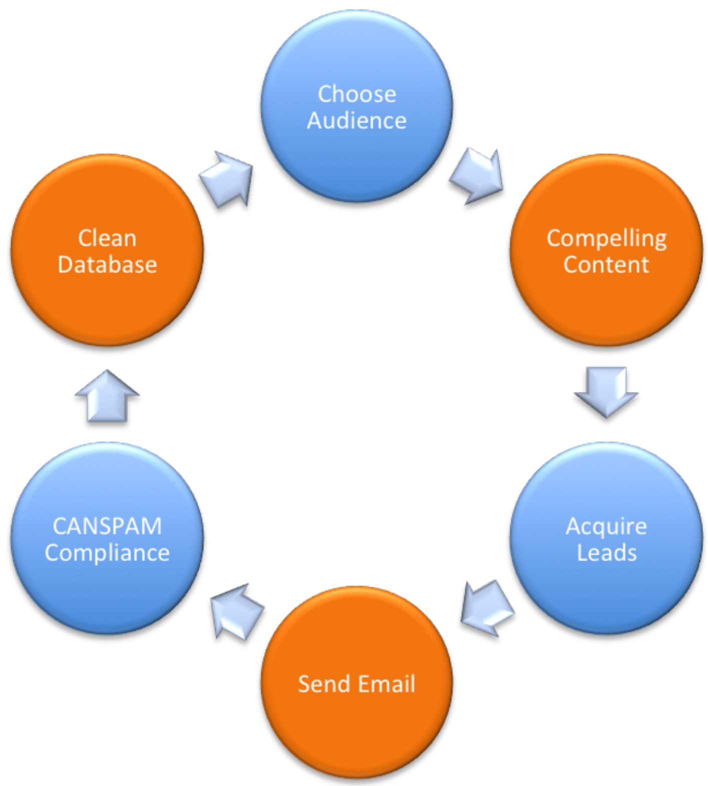
Email Reputation Management

Easy Email Reputation Checklist

- ❑ SPF and DKIM are setup at the integration stage.
- ❑ Migrate your suppression list properly.
- ❑ From address is from a valid domain from Step 1. Make sure this is an alias or box you have proxy control over.
- ❑ Use Marketo's Email Checklist while building your templates.
- ❑ When building email templates, use a spam and viewing checker to verify your code is up to snuff: EmailOnAcid, Litmus.com, Mailchimp (paid), ReturnPath, GreenArrow, 250ok, or IBM Deliverability add-on for Marketo.
- ❑ Avoid common spam words and sales-y content. Here are two recommended lists.
    - ❑ Sendblaster's List
    - ❑ Mannix Marketing
- ❑ Subject line avoids non-alpha characters, ALL CAPS
- ❑ No rich media or scripting
- ❑ Limited images. Be sure to include ALT and Description tags to ensure people who block images in their email viewer can read what you intended.
- ❑ No hidden font colors such as White, Red, or Gray.
- ❑ Avoid too many font size changes or large fonts.
- ❑ Manage your database to clean out hard bounces, multiple bounces, and spam traps regularly.

The Deliverability Circle

The Deliverability Circle is how you build and maintain a reputation online. It is a high level view of what happens. Like any reputational system, it is a virtuous (or bad) spiral up or down.



The Circle can be maintained by a few key steps that go deeper into the operational nature of sending email.

Step 1: Acquire Leads

These must be opt-in leads directly to your database or owned lists. Third party lists do not count. Remember, unsolicited email is against Marketo's policies and many laws.

Caution: US, Canadian, and EU laws describe how each form should work.

Your landing pages and forms should identify your company, brand, or business unit along with the expectations for the form. If your page is about downloading that amazing white paper, then your form should make that clear. Your copy should say what will happen next, including if signing up will send the prospect an email or just to the next page. The form can offer an opt-in to communications, but do not assume they want to do so.

If you've been on the internet for awhile, you've seen opt in and unsubscribe forms of various types. **Never** setup a form to do the following as it may be against local laws, and it is certainly going to annoy people:

- Pre-check "Yes" for any opt in.
- Offer only a generic "sign up for promotions" (you must and should offer options for each type of communication you intend to offer).
- Require Name or other fields to unsubscribe.

If someone signs up for a newsletter or promotional email, do your best to set expectations on the frequency of the emails and what kind of content. If you can, post a link to an example of what they will receive.

Step 2: Proper Email Structure

Your emails should identify your firm, product line, or business unit with a consistent From/ReplyTo address and label, such as Josh Hill <marketo.guide@marketingrockstarguides.com> for any emails sent about the Marketo Guide.

One of Marketo's key features is the ability to track email link clicks to help you gauge engagement levels. If you can, add Branded Tracking Links so spam filters see consistency between your domain and the links embedded in your email. (The reason is phishers will try to spoof domains, requiring inconsistency in domain links).

Step 3: Use smart lists to target the leads most likely to want your email.

Large generic email campaigns have lower deliverability and higher unsubscribe rates, which hurt your reputation. Send email to people who opted-in to a specific type of communication. If you invite people to an event, make sure you allow people to sign up for invitations and then target people in the geographic area who are interested in that topic.

Step 4: Send your email at the best times for your audience.

See the discussion above and the Email Timing section.

Step 5: Practice Good Data Cleanliness

Handle inactive, invalid, old, or bounced leads effectively using the techniques below. A key technique is to ensure you send one email to everyone in your database at least every 6 months. People change jobs fairly rapidly as well as emails. If you ping everyone every 6 months, you are more likely to find out which emails have gone dark before the ISP or corporate office convert these old addresses into Spam Traps. Repeated emails to dormant email boxes will eventually cause your other emails to be sent to Spam or your domain may be blacklisted.

It is better to prune your database slightly now, rather than hurt the rest of your email ability later. More about managing bounces is below, however, you should already practice good Data Management.

Technical Aspects of Reputation

As Stephen Covey says, first things first. The best way to stay ahead of the spam filters is to show them you are who you say you are.

Best Practice: Setup SPF, DKIM during Marketo integration steps.

Know Your Email System

You should collect all the generic marketing email address details here. It is important to understand how your IT Department sets up the Email address on your server and how that will translate into the actual email other people see. Keep Track of Your Email Boxes and Check Them Daily

Ask these questions:

1. Who will have access to these email boxes?
2. Can I use any alias? Or just the subdomain alias?
3. What will external people see when I send email to them from this box?
4. Will received email be forwarded to a specific person?
5. Which boxes do I need?
6. Which boxes exist?

Make a list of those boxes here:

Email Box Name	Alias in Use	Password	Purpose
Events	Events@subdomain.yourdomain.com events@news.yourdomain.com	XXXX	Event Registrations
Service	service@yourdomain.com		Service Requests
Webinars	webinars@yourdomain.com webinars@events.yourdomain.com		Webinar Invitations

Managing Bad Emails in Marketo

The next step is to start managing bad emails in Marketo. You can use Marketo's automation flows and smart lists to quickly handle bad emails as they enter the system. Here are examples of "bad" email addresses:

- Competitor Email Domains (see handling data quality)
- Competitor Company Names
- Personal Email Domains: eg. Gmail.com, yahoo.com, etc…

- Spam Trap Email Addresses
- Invalid Emails
- Old Leads' Emails
- Hard Bounced Emails (see details below)

Removing these names from your standard House Lists is pretty easy--let Marketo do it for you!

Spam Traps

Spam traps are email addresses, inboxes, usernames, or aliases used by domain owners, postmasters, and ISPs as "honeypots" or as more generic inboxes. You may be familiar with some such as your own `sales@yourdomain.com` or `hello@mydomain.com`. Since many of these are posted on websites, spammers will use bots to collect these emails, then spam those boxes. Spam filters and domain owners catch emails sent to these boxes and treat them more harshly than other emails. ISPs are also known to use expired accounts to also filter potential spam. If your database has a lot of these addresses, your Sender Score will drop quickly if you keep sending mail to them. Spam traps may also cause blacklisting for your IP/domain and will prevent your engaged leads from properly receiving your email. Take the time to remove spam traps because they are not serious leads. Anyone who puts in sales@mydomain.com to your landing page is not a serious lead.

If you are a marketer, you may manage the company's main or regional contact us email box. That box probably has a ton of spam even if you are using a spam filter. Likewise, a lead might use their firm's email box to sign up for your white paper since they don't want to receive your emails directly. (Especially if you are using JavaScript to force people to use a non-personal domain). So let's add these accounts to our lists too.

Also see this interesting discussion about blocked domains and spam traps. You can find your spam traps with a quick smart list to be used as part of a trigger campaign.

Personal Email Domains

According to ReturnPath's December 2011 Study, Gmail's Priority Inbox is now used by 93% of Gmail users. That means only 8% of messages are marked as priority. If you are a marketer, it is very unlikely your email is marked as a priority if you sent it to a Gmail address. ReturnPath's 2012 SenderScore Report shows the top three ISPs (Gmail, Hotmail, and Yahoo) had an average inbox delivery rate of 79-89% if your email IP and domain had a 91-100 score.

Of course, if your deliverability is lower than the B2B average of 86%, you may consider excluding these leads if they do not have the other target demographic details your sales team wants.

As a B2B marketer, your goal is to reach people at businesses, so you already lowered a personal domain address in your priority list with Lead Scoring, right?

While negative scoring for personal domains is fine, I do not always recommend deleting these leads because some portion of that list are waiting until they are ready to speak to Sales before giving you their work email address. Completely cutting off communications with such leads may be detrimental in the future. Depending on which communications these leads opted-in to, you may be able to continue to nurture them; coaxing them with compelling content to reveal their true address. Until that day, however, you may want to reduce the email you do send to this group. For instance, after lowering their Lead Score, only send them lower value content until they give you more information or a buying signal.

Smart Lists to Create	Filter Settings	Criteria

Spam Traps	Logic: ANY:
	`Email Address CONTAINS`
	
	`Email Address STARTS WITH`
		`abuse@`
		`postmaster@`
		`security@`
		`Sales@`
		`Asia@`
		`Americas@`
		`emea@`
		`contactus@`
		`hello@`
		`unsubscribe@`
		`info@`
		`Events@`

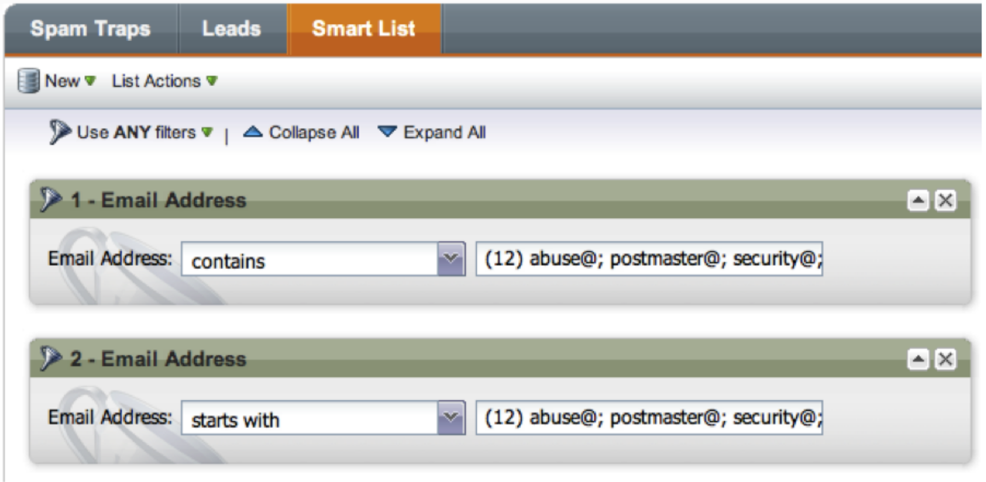
Personal Email Domains	Email Address CONTAINS	@gmail.com @yahoo.co.uk etc… [Here's a List]()

Competitors	Logic: ANY
	
	`Email Address CONTAINS`
	
	`Company CONTAINS`
	`Company IS`
		[Your Firm's Competitors]
		
		[Here are lists of major firms.]()

**Examples only! Please add or remove email inbox accounts as befits your business.*

How to Clean Up Spam Traps and Others Problem Leads

Step 1: Create a Smart List with the criteria above for your business.

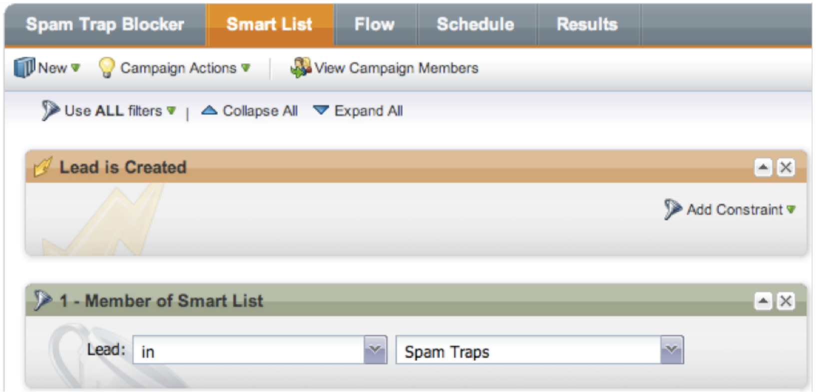


Step 2: Create a Campaign Called Spam Trap Blocker

Use the trigger Lead is Created with no filters, unless you need them. We want to capture all leads who come in with these criteria.

Add the `Member of Smart List IN "Spam Traps"`

Batch Case: In this case we are creating a Trigger Campaign. You may want to remove the trigger Lead is Created to first remove existing spam traps.

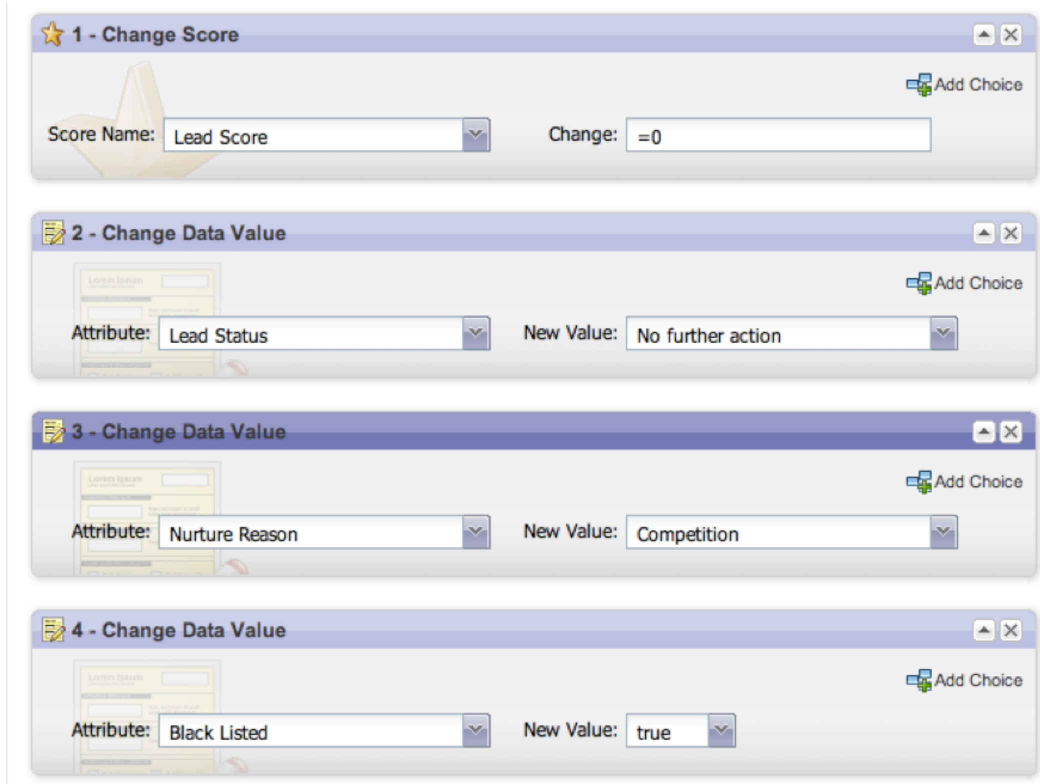


Step 3: Flow Steps

Bring over the actions you want Marketo to take. In this example, I did the following:

- `Change Score = 0`
- `Change Data Value: Lead Status = No further action`
- `Change Data Value: Nurture Reason = Competition`
- `Change Data Value: Black Listed = True Note`: this is the best way to make sure these leads never receive an email.

This is what I do with my spam trap emails. Sure, it is possible these leads may change their email address—in the future—but until then, we should not speak to them via email at all. For the `Nurture Reason` status, we have `Competition` as an option to block nurturing; however, you may have other methods or needs.



Step 4: Schedule

Now you can activate this trigger. In this case, I want the lead to run through just once, because we hope not to see them again until they are no longer spam trap qualified.

Note: for the Batch campaign, you will simply select `Run Once` then `Run Now`.

How Does Marketo Handles Bounces?

Marketo handles email errors automatically using a few simple rules based on the error codes sent back by the recipient’s server.

Bounced emails are not happy bouncing balls, rather they are indications your target did not see your email arrive at the inbox. There are different types of bounces, which Marketo handles automatically for you in most cases. It is a best practice to periodically evaluate the health of your reputation, email lists, and overall database using smart lists and reports.

Marketo puts it succinctly:

> *“The only difference between a hard bounce and a soft bounce is that a **hard bounce** is when the email server says, “I will not accept this message, stop talking to me now” and a soft bounce is when the email server says, “I will not accept this message, please try again in 5 minutes.” **Soft bounces** are usually for technical problems, which is why it suggests retrying. Marketo will retry a soft bounced message for up to 4 hours, at which time it will become permanent.”* [emphasis added].

Managing Your Bounces

Marketo is designed to help you manage bounces of all types. In certain situations, Marketo handles these for you, blocking leads or suspending them. In others, you need to setup a system that automatically handles soft and hard bounces to ensure you do not continue to send email to them. One way is to periodically check your smart lists and reports, however, you can handle repetitive bounces automatically, choosing to Marketing Suspend or Unsubscribe such leads depending on your needs.

Marketo has several built in fields for handling email:

Field Name	Purpose	Notes
Email Suspended	Used to suspend a Lead's email address for any length of time. Used to automatically suspend non-fatal Hard Bounces for 24 hours.	System field not available to users.
Marketing Suspended	Available to marketers to suspend email for any length of time. Use as a filter or Change Data Value flow action.	User field.
Email Invalid	System or User field available on filter or Change Data Value to permanently stop emails to that address. Use this field instead of Unsubscribed if automatically invalidating bounces or bad emails addresses	This is different than Unsubscribed, because Unsubscribed is a Lead's preference.

Soft Bounces

These are temporary errors on the recipient's side. Marketo will keep trying to send the message for up to 4 hours. These messages are "`Pending`" in the `Email Performance Report`. After 4 hours, the message is reported as a Soft Bounce.

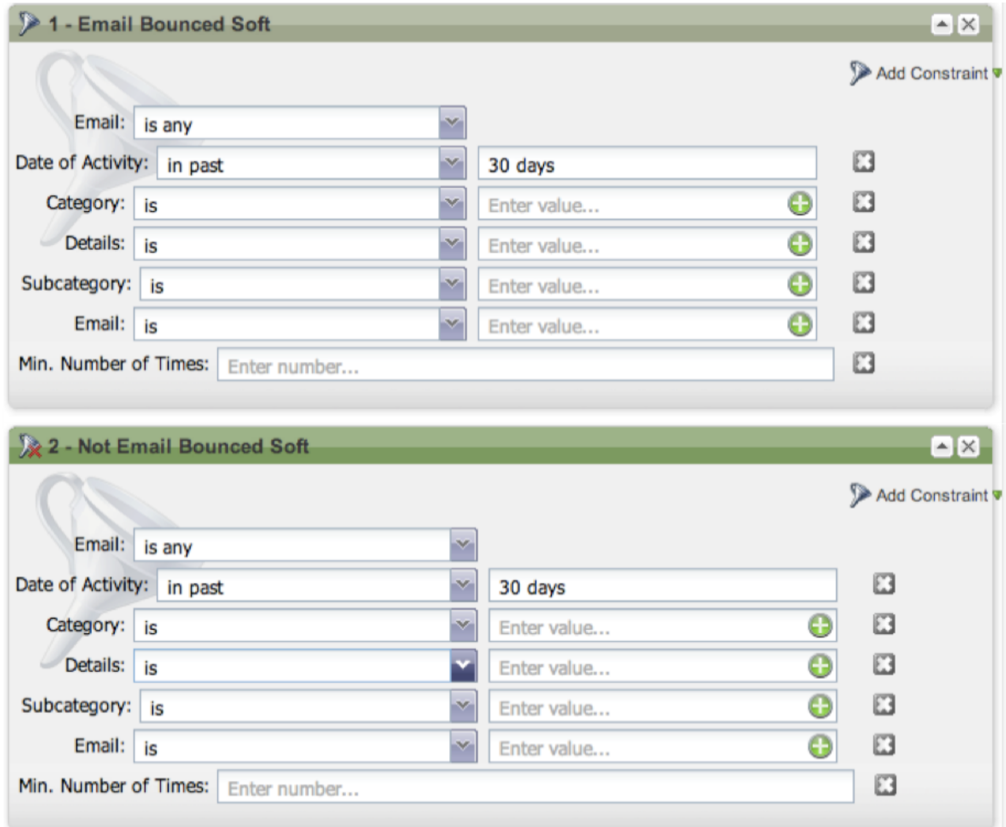
Leads who soft bounce continue to be available for emails in the future. You may want to consider managing leads with multiple soft bounces using the data management techniques below.

To create a list of `Soft Bounces` by leads take the following steps.

Step 1: Create a new smart list called "Soft Bounce Control"

Step 2: Pull in the Email Bounced Soft filter

You can also use `Not Email Bounced Soft` or multiple `Email Bounced Soft` filters to select just the right group. You may want to use a smart list like this one, adjusting the criteria in accordance with your deliverability and privacy policies. In this screenshot, we can see all of the filter options, but you do not need all of them.



Step 3: Add Constraints if Needed

I am showing all the constraints here, however, `Date of Activity in Past 1 Day or 48 hours` may be what you need. If you want to see a list for just one email, or a program of emails, be sure to select that email or pull in the `Member of Program` filter.

Step 4: Press Leads to see the lead list.

Step 5: Decide What to Do

Once you have this list you can decide if there is a temporary issue, such as vacation responders, a network problem, or if you want to consider sending a following (or **not** sending a follow up) to this group.

Hard Bounces

According to the Marketo Email Deliverability documents, hard bounces usually fall into three areas:

Type of Hard Bounce	What Marketo Does Automatically	What You Can Do To Help

Email Incorrect (mistyped, non existent)	`Hard Bounce = True`
	`Reason = Response Code`
	`Email Invalid = True`
	Email will be listed as blocked from mailings
		1. Lower score.
		2. Examine the list to see if an email had an obvious typo, e.g. "@gmlai.com" for "gmail.com"
		3. Remove from your house lists.
		4. Create a smart list to examine bounce codes.

Anti-spam Block (spam trap or your domain was blacklisted as a spammer)	Suspended for 24 Hours Email Suspended Cause Marketo will not try again for this email. The next email will be sent after the 24 hours is up.	1. Analyze these using a smart list [2. If your email or domain are blocked/blacklisted, call Support [link] 3. Setup DKIM/SPF 4. Examine copy and html layout of your emails 5. Remove Spam Traps
Technical Issue (the recipient's server did not properly respond).	Nothing *Email address is still available to send.*	Nothing.

Here are some examples of hard bounce messages from Marketo's Killer Email Deliverability Presentation, May 2012.

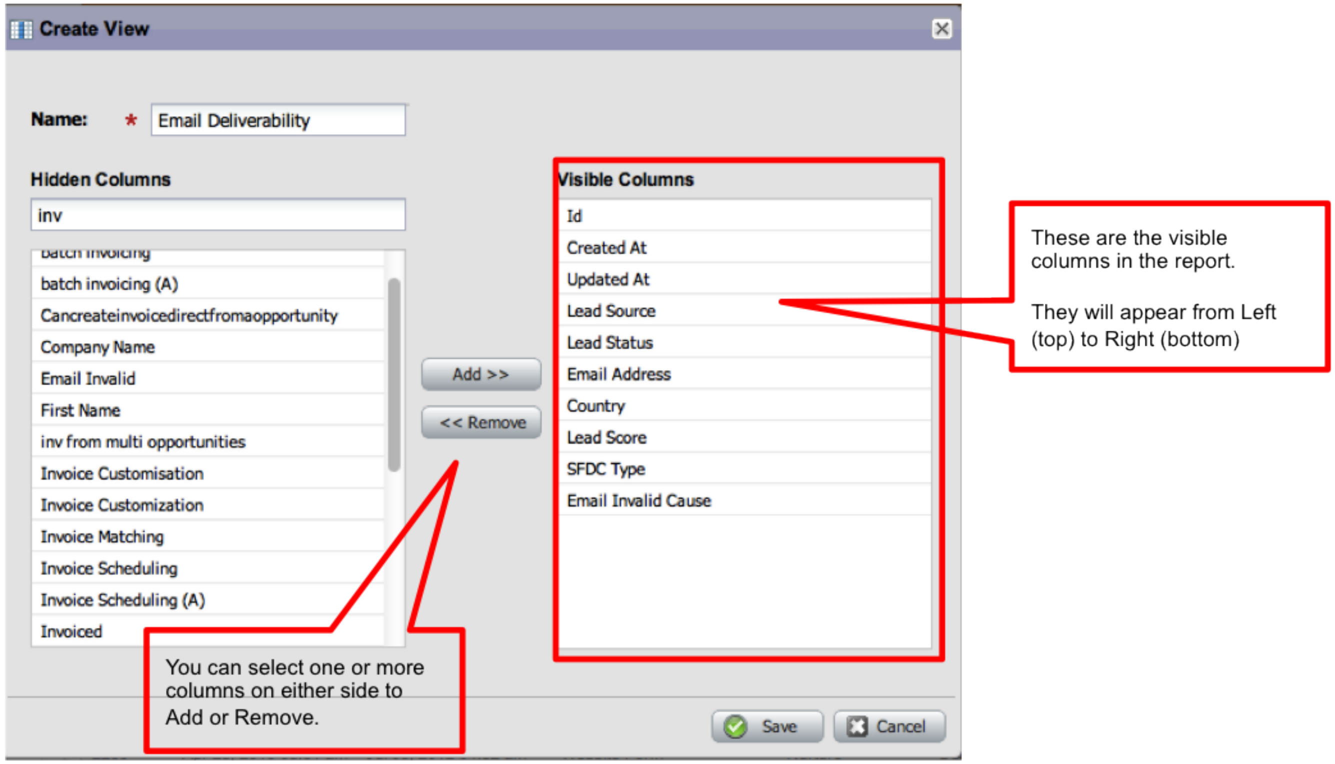
Email Suspended Cause	Email Suspended At
Exceeded MaxAttempts - 571 5.0.0 Message Refused	Dec 06, 2011 12:19 pm
BOUNCE FILTERS MATCHED MESSAGE BODY	Dec 06, 2011 12:20 pm
Exceeded MaxAttempts - 554 5.0.0 Service unavailable; Client host [em-sm4-141.mktomail.com] blocked by bl.spamcop.	Nov 16, 2011 08:10 am
Exceeded MaxAttempts - 554 5.7.1 <em-sm4-142.mktomail.com[199.15.212.142]>: Client host rejected: Access denied	Dec 08, 2011 05:40 am
Exceeded MaxAttempts - 550 5.7.1 Message rejected due to content restrictions	Dec 08, 2011 05:31 am
[Message Expired] [VALID DOMAIN,1323203045,43,1] Exceeded MaxAttempts - 451 4.3.0 Not currently accepting mail f	Dec 06, 2011 05:10 pm
[VALID DOMAIN,1323351104,4,1] Exceeded MaxAttempts - 550 5.7.1 Message rejected due to content restrictions	Dec 08, 2011 05:31 am
Exceeded MaxAttempts - 554 5.0.0 Denied [IPR] (Mode: normal)	Dec 06, 2011 12:22 pm
Exceeded MaxAttempts - 553 5.1.0 Sorry, your email address mail179@em027.mktomail.com has been blacklisted. Plea:	Dec 06, 2011 12:20 pm
Exceeded MaxAttempts - 550 5.7.1 Command not allowed	Dec 06, 2011 12:24 pm
Exceeded MaxAttempts - 571 5.0.0 Message Refused	Dec 06, 2011 12:17 pm
Exceeded MaxAttempts - 550 5.2.0 Blocked	Dec 06, 2011 12:23 pm
Exceeded MaxAttempts - 551 5.0.0 message appears to be spam	Dec 06, 2011 12:19 pm
Exceeded MaxAttempts - 571 5.0.0 Message Refused	Dec 06, 2011 12:18 pm

To examine Hard Bounces in more detail, create a new smart list

Step 1: Go to Lead Databases > System Smart Lists

Step 2: Clone the Bounced Email Address Smart List
Name it `Invalid Emails List`

Step 3: Use the View Tool to Create a New View: Email Deliverability



Step 4: Add the Email Invalid Cause as a Column to the RIGHT side "Visible Columns"

Step 5: Review Email Invalid Causes

Once you're in the Leads list, you will see the `Email Invalid` column. Be sure to expand it to see more detail.

Note: Some email invalid cause fields may be blank if they were part of an import of your bounce list(s). –

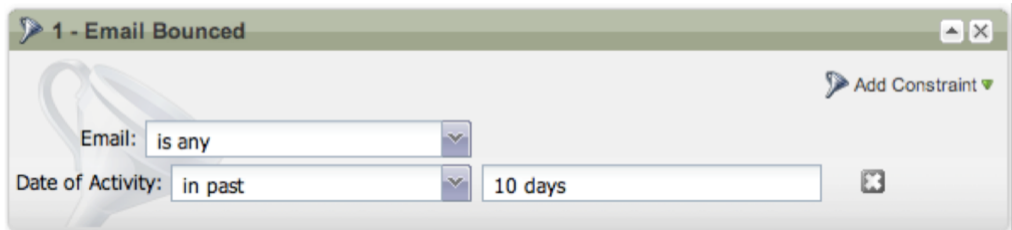
(Thanks to [BeHai] for this tip)

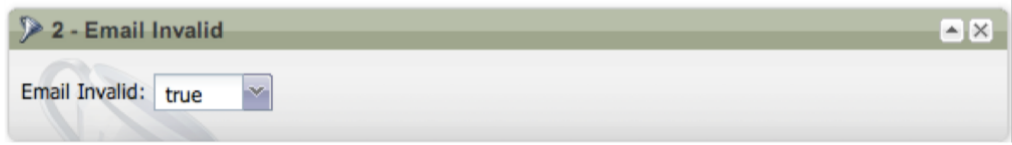
Step 6: Optional: Clone this List or Use other Filters to See Soft or Hard Bounce Causes

If you prefer to build your own list, here are some options.

Hard Bounces Who Are Invalid Lists

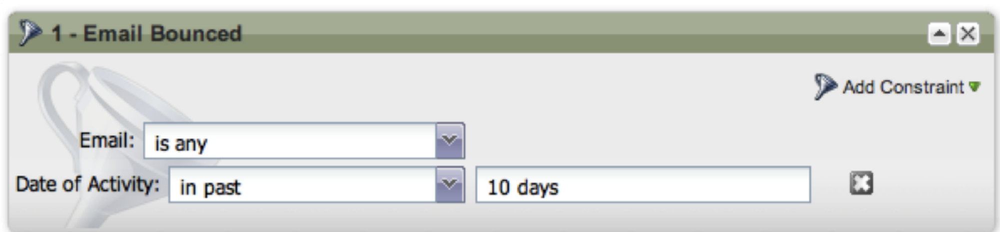
Leads which bounced during a time period and are currently invalid. You should check this list once a month for possible typo emails, recovering some Leads.

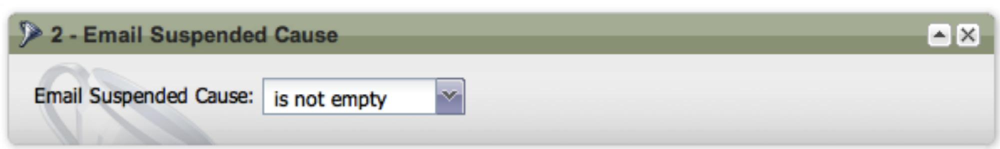




Anti-Spam Block Lists

These lists can help you find the worst offenders who are already ruining your reputation.





Creating a Repetitive Bounce Smart List

But for repetitive bounces, you do need to handle those directly. The example system below is based on Marketo's suggestion from the Killer Email Deliverability presentation.

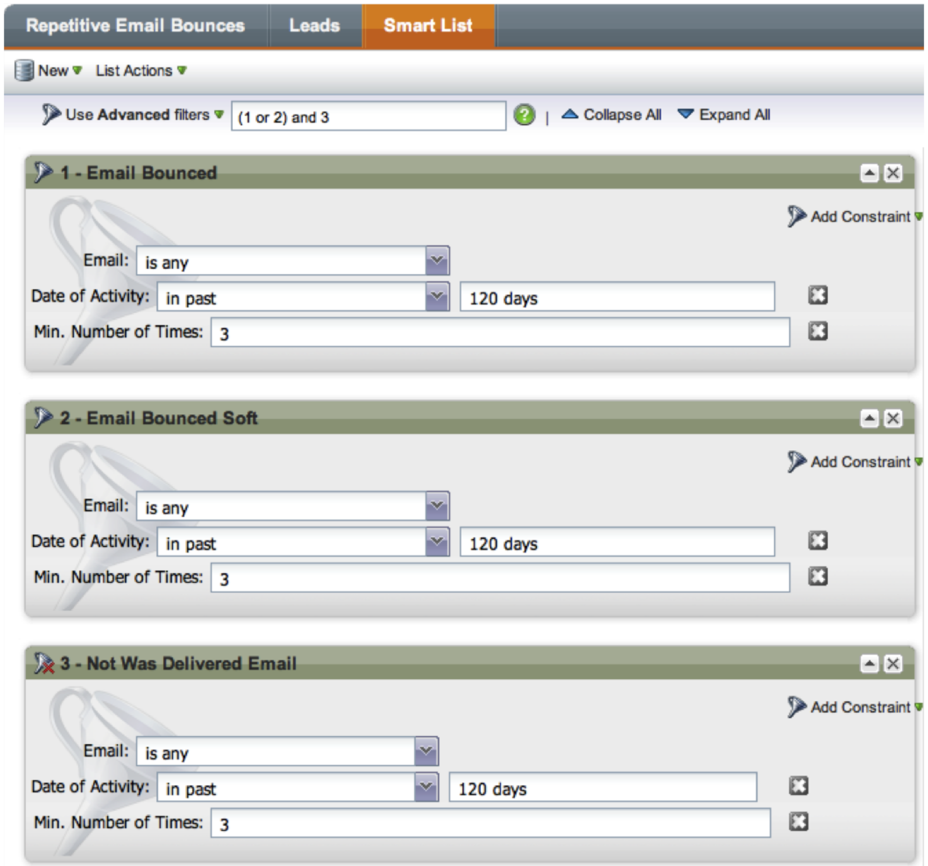
Step 1: Create a Repetitive Bounce Smart List

Marketo suggests using in past `4 months and Min. Number of Times = 3.` That sounds good to me, but feel free to adjust this.

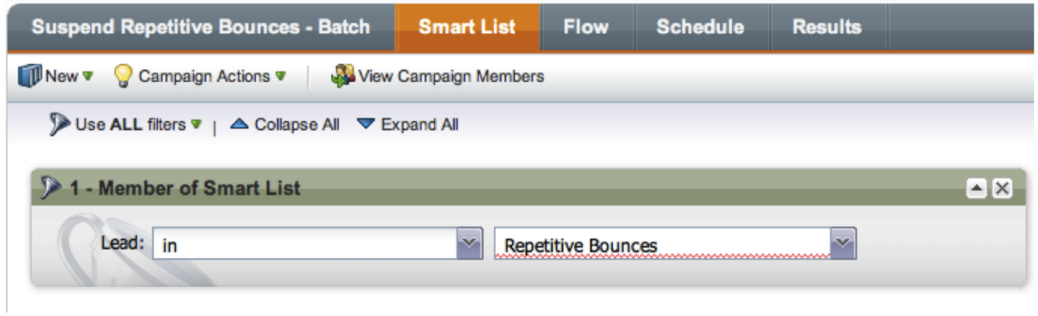
In this example I am showing all of your options if you wish to restrict this workflow in other ways.

Use `Advanced Filters: (1 OR 2) AND 3`

Note: You can use this Smart List as a Trigger if you prefer, but a Batch campaign will allow for more complete responses over 2-4 days.



Step 2: Create a Batch Campaign called "Suspend Repetitive Bounces – Batch"



Step 3: Campaign Smart List

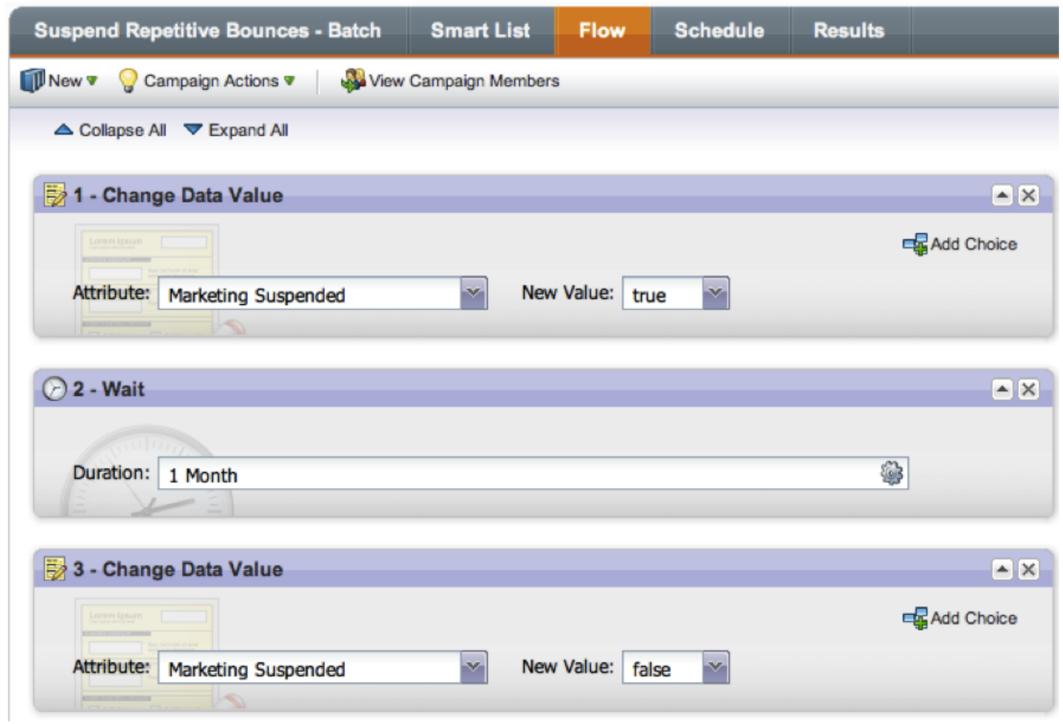
Pull in the `Member of Smart List` filter, inserting the `Repetitive Bounces` list or other lists as needed.

Step 4: Flow

What you do next is entirely up to you. In this example, we are `Marketing Suspending` these leads for 1 Month. After 1 Month, the leads are available to try again.

A tighter way to control repeated bounces is to simply set their `Email Invalid=True` and/or `Marketing Suspended`. That way you do not waste time or reputation attempting to reach leads that are not available.

You may also want to reset their `Lead Score` or change their `Lead Status` if that is part of your lead flow process.



Step 5: Schedule

- Batch
- Qualification Rule: `Once Every 30 Days` since the wait step is 1 month.
- Schedule `Recurrence for Daily at 2:00 am`

Frequently Encountered Bounce Codes

These are the most commonly encountered inside Marketo on the lead record or in your CRM. There are many more and they may be formatted in a variety of ways including "5.4.1".

If you want to explore these codes further, ask your IT team, or try these resources:

- Marketo codes and view for ESMTP
- Non-delivery reports.
- The IETF Standard.

Response Code	Type of Bounce	Error Detail	What this means for you
421	Soft	Service not available, closing transmission channel (This may be a reply to any command if the service knows it must shut down)	The receiving computer shut off.
450	Soft	Requested mail action not taken: mailbox unavailable (E.g., mailbox busy)	Mailbox problem.
451	Soft	Requested action aborted: local error in processing	Local error to recipient.
452	Soft	Requested action not taken: insufficient system storage	Receiving server ran out of memory.
500	Hard	Syntax error, command unrecognized (This may include errors such as command line too long)	One or both servers did something wrong.
501	Hard	Syntax error in parameters or arguments	One or both servers did something wrong.
502	Hard	Command not implemented	Your server asked for the wrong thing.
503	Hard	Bad sequence of commands	Your server asked for the wrong thing.
504	Hard	Command parameter not implemented	Your server asked for the wrong thing.
550	Hard	Requested action not taken: mailbox unavailable (E.g., mailbox not found, no access) This is the most common response code if an email bounced.	Recipient no longer exists, is disabled, etc.

Response Code	Type of Bounce	Error Detail	What this means for you
551	Hard	User not local; please try	Recipient does not exist
552	Hard	Requested mail action aborted: exceeded storage allocation	Recipient's box is over quota.
553	Hard	Requested action not taken: mailbox name not allowed (E.g., mailbox syntax incorrect)	The recipient's email had an error when it was typed in.
554	Hard	Transaction failed	Total failure.

How do I Fix an Error After I Press Send?

Step 1: See the Checklist for Sending an Email to avoid mistakes.

Step 2: See below ☺

Oops! You sent the big email out, but only noticed that typo and link error as Marketo was processing the campaign.

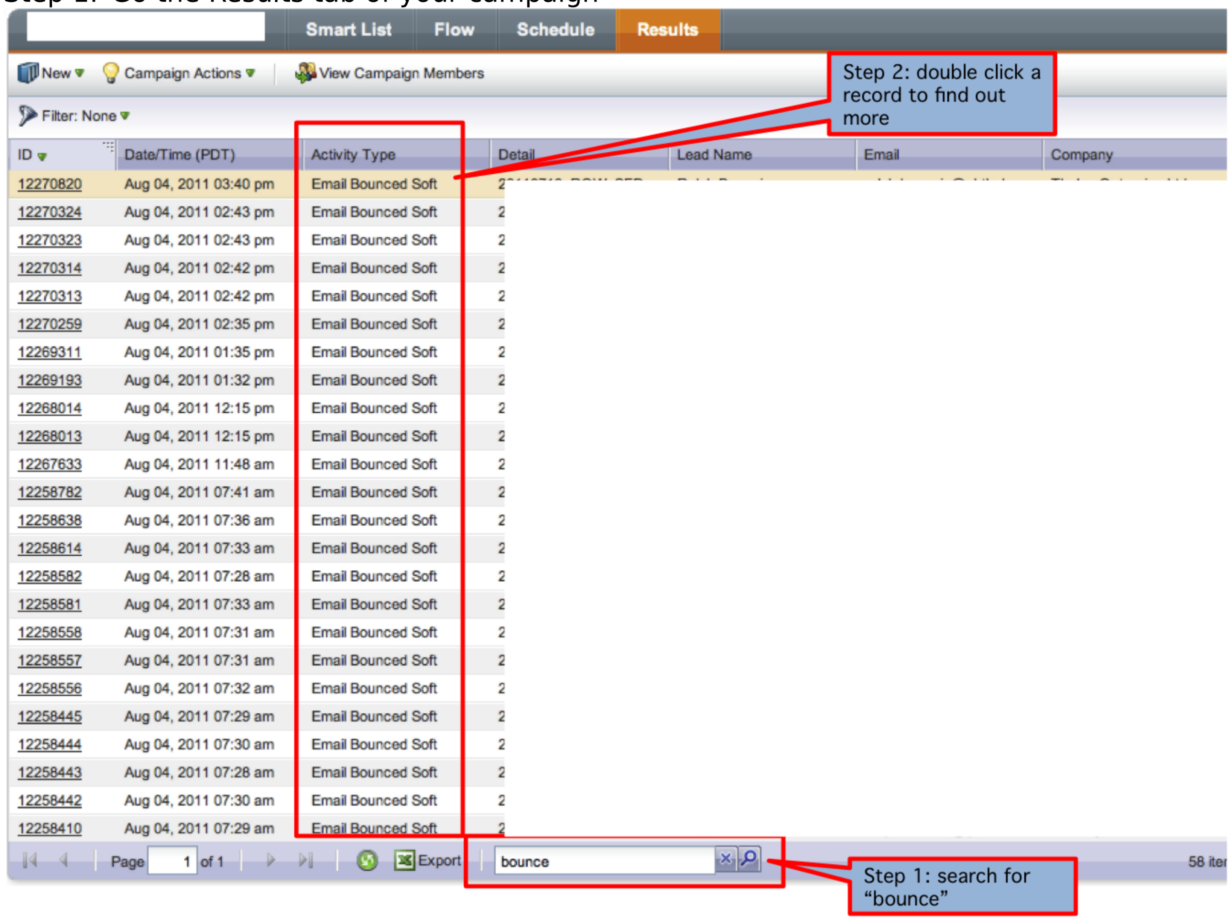
What do you do now?

Don't panic. Sending the wrong email with the wrong date or some other typo happens to everyone. Unless your open and click through rates are 100%, you can rest assured only a small number of people were affected.

Scenario 1: All of my Emails Bounced? WTF?

Sorry to break this to you, but this is likely an error on your part. Possible errors include the From address being invalid or sending emails to all spam traps. If you find out other ways, let me know.

Step 1: Go the Results tab of your campaign

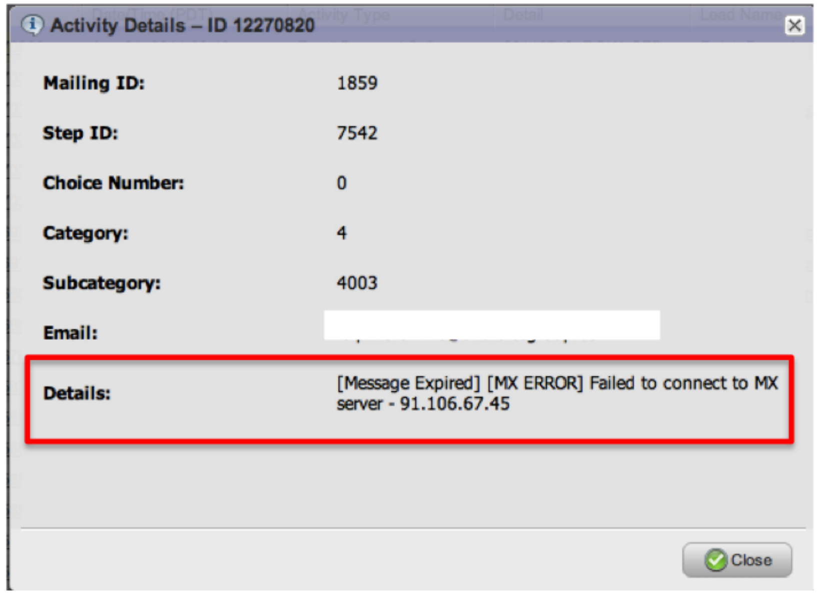


Step 2: Search for Email Bounced

Step 3: Double click on one of the results

Step 4: If this Activity Details show "Invalid-From-Address" –

<Smack head with palm>



Step 5: Resend the email with a cloned campaign.

If you do not use a cloned campaign, be sure to `Run` the campaign again and change the `Qualification` Rules to `Run Lead Every Time` (or twice).

Scenario 2: Handling Typos and Invitation Errors

A typo can be embarrassing. Fortunately, not everyone will notice a typo because email is scanned before it is read. If the typo is trivial, do nothing. Sending a second email or apology will only draw attention to your mistake. A second very similar email within a short amount of time will lower your email reputation.

1. Spam filters will see the second email and start restricting your emails. That's bad, because now you increased the number of future emails which will get stuck by the spam filter, lowering your Opens, CTR, and leads.
2. People get annoyed. They will see the email as a duplicate and wonder what you are up to. They will spam the email, delete it, unsubscribe, or filter you out more often.

But maybe it is a big problem. You sent the big invitation with the wrong date. Or the email went out twice. Or someone played a joke and approved an email with some unprofessional text. What do you do now?

If you can, stop the campaign process now. Here is how to do that:

Step 2: Deactivate the campaign or next run.

Go to the campaign and deactivate it, which also includes deleting future Runs. If you were able to cancel the Run before its activation time, great! Go ahead to fix your email and rescheduling this one.

Best Practice: Always schedule a Campaign Run in the future, even if it is 10 minutes from now.

Deactivation does not stop the Send Email flow step. Marketo recommends then Deleting the entire Campaign flow step to ensure the process ends. If there are more than 10,000 Leads, please call Marketo Support for immediate help. Marketo also requests you contact them regarding mistaken emails in these situations:

- Mailing the entire lead database.
- Mailing your Unsubscribe list.
- Emailing over 50,000 people unintentionally.

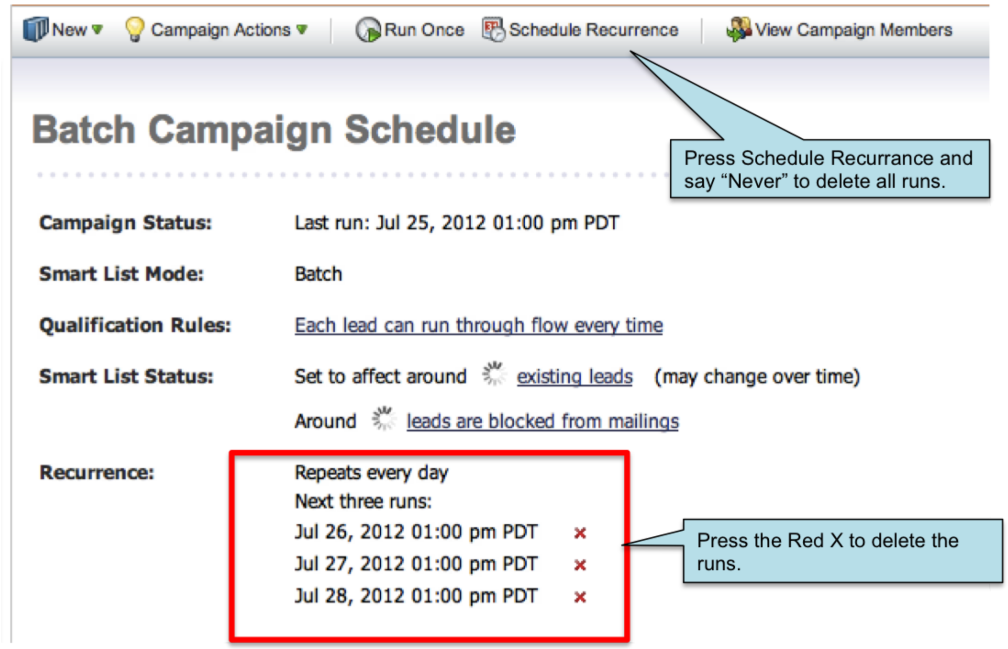
Marketo will then be able to help you further with potential complaints and blacklisting issues which could arise from large unintended email blasts.

Caution: call Marketo if a large mistake occurs. They can help reduce the impact.

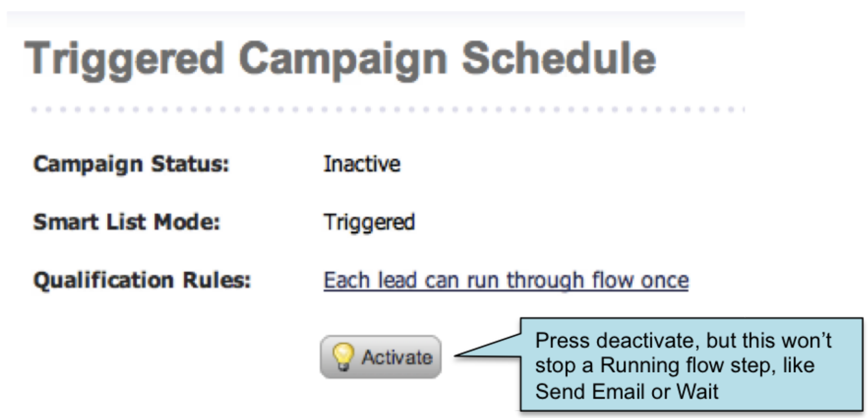
Since some or all of your target leads were sent the email, you need to handle a possible correction, go to Step 3.

Step 3: Press the Big Red Button → Delete the Flow Step in the Campaign

If your campaign is already running…


New
Campaign Actions
Run Once
Schedule Recurrence
View Campaign Members
Batch Campaign Schedule
Press Schedule Recurrance and say "Never" to delete all runs.
Campaign Status: Last run: Jul 25, 2012 01:00 pm PDT
Smart List Mode: Batch
Qualification Rules: Each lead can run through flow every time
Smart List Status: Set to affect around existing leads (may change over time)
Around leads are blocked from mailings
Recurrence: Repeats every day
Next three runs:
Jul 26, 2012 01:00 pm PDT
Jul 27, 2012 01:00 pm PDT
Jul 28, 2012 01:00 pm PDT
Press the Red X to delete the runs.

OR


Triggered Campaign Schedule
Campaign Status: Inactive
Smart List Mode: Triggered
Qualification Rules: Each lead can run through flow once
Activate
Press deactivate, but this won't stop a Running flow step, like Send Email or Wait

Step 4: Create a new email with corrected text

If you believe it is necessary, add an apology. If you made an error on the date, time, or location of something, be sure to make it clear that you are correcting this.

Step 5: Schedule the Email

Wait an hour or two if you can because you will likely want to restrict the second email to leads who Opened or Clicked in the email. While apologies are great, you may only want to send the correction to the people who actually saw the email.

Of course, if you were sending a follow up email for an event, you may want to send the correction to the entire list.

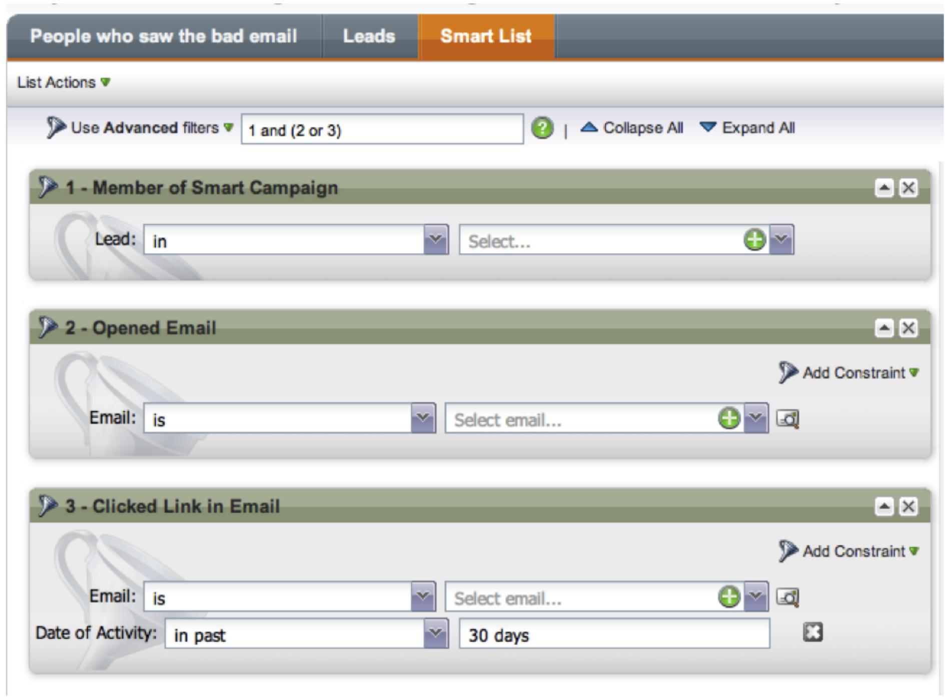
How to email affected leads only

The difficulty here is that not everyone allows images or html in their email viewers, so you may lose quite a few people who did see the typo, but who blocked you from tracking them.

Step 1: Create a new campaign in the Program: Invitation – Correction

Step 2: Smart List:

For the Smart List, use filters such as `Member of Campaign` AND (`Opened Email` OR `Clicked Link in Email`)



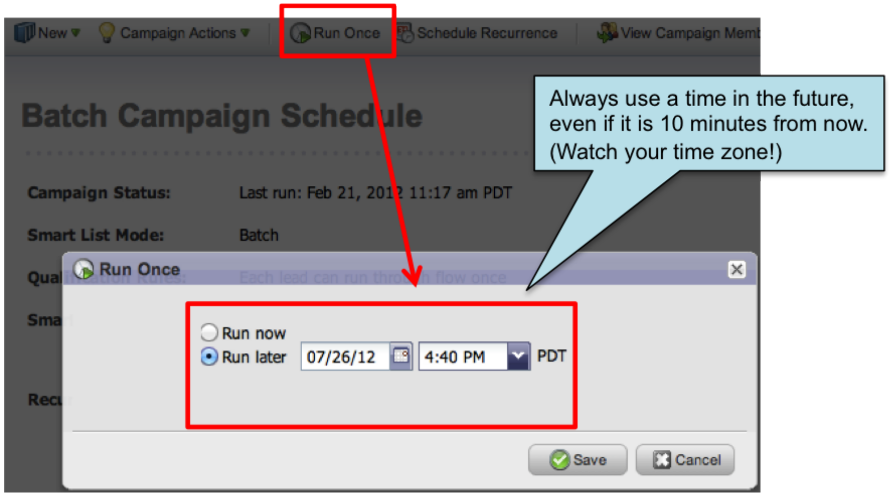
Depending on the situation you may want to use `Was Sent Email` or `Was Delivered Email` filters.

Step 3: Test the Email

Really. Use the Test button. Use it at least 3 times to different email boxes, which will force you to read it this time.

Step 4: Schedule

When you schedule the campaign to run, tell it to run in 10 minutes. That way you will have time for your brain to realize any other mistakes.



Keeping Track of Deliverability

You can keep track of deliverability using a few tools previously mentioned, as well as a host of resources inside Marketo.

Metrics and Benchmarks

I recommend monitoring the following data and reports as well as tracking your rates in a spreadsheet. Here's a sample to get you started. [xlsx]

Metric	Where to Find It	Frequency	Why
Sender Score	http://trust.marketo.com https://www.senderscore.org/ http://landing.returnpath.net/SSreport	First of month	For shared IPs, the Marketo Score is what you want. SenderScore is a third party rating which many ISPs, spam filters, and email programs use to judge your email.
Delivered %	Marketo Email Performance Report	M/A	List health, spot list quality issues
Open %	Marketo Email Performance Report	M/A	Quality of Subject Line Quality of List
CTR	Marketo Email Performance Report	M/A	Quality of Copy or CTA
Unsubscribe %	Marketo Email Performance Report	M/A	Relevancy and list quality
Hard Bounce %	Marketo Email Performance Report	M/A	List Quality
Soft Bounce %	Marketo Email Performance Report	M/A	List Quality
Heat Map	Email Link Performance Report	Individual	Layout, Offer

Now that you have your deliverability report, your manager asks, "How does that compare to other firms?" The good news is there are several firms working to survey marketers like you to find out how well we are doing.

Marketo's November 2011 Benchmarking Survey found the following results:

Metric	Average	Top Performers
Open Rate	11-15%	16.0-20.0%
CTR	2.1-5.0%	5.10-10.0%
Clicks to Opens	11-15%	16.0-20.0%
Bounces	2.10-5%	<2.0%
Unsubscribes	.11-.20%	<.10%

The data implies a deliverability rate of 95.0-97.9% for those who took the survey. Keep in mind the survey respondents were self-selecting Marketo users as well as only B2B marketers. ReturnPath showed that 86% of B2B email reached the inbox. The overall picture is worse: IBM's report for the same period showed 83.25% deliverability overall which was higher than ReturnPath's reported 76.5%. These numbers include B2C with the critical holiday retailer rush period in Q4 2011.

ReturnPath's 2012 SenderScore report shows that firm's with scores in the 81-100 range have an average delivery rate of 92% to 95%.

Since data is changing all the time, check out the latest reports yourself:

- MarketingSherpa's CMO Perspectives on Email Deliverability Report: [ReturnPath, Gated]
- Marketo's Benchmark Survey [Gated, Requires Survey]
- Here's a sample from Marketo [PDF]
- Marketo's Benchmark Data from November 2011 [Marketo] [Slideshare]
- ReturnPath's 2H 2011 Benchmark Data or Fill out their form. [ReturnPath, Gated, PDF]
- SendGrid's Analysis of ReturnPath's Report
- IBM Email Deliverability Report: [PDF, Gated] This is quite detailed. Marketo is a reseller of this tool.
- HubSpot's Science of Email Timing [Slideshare]

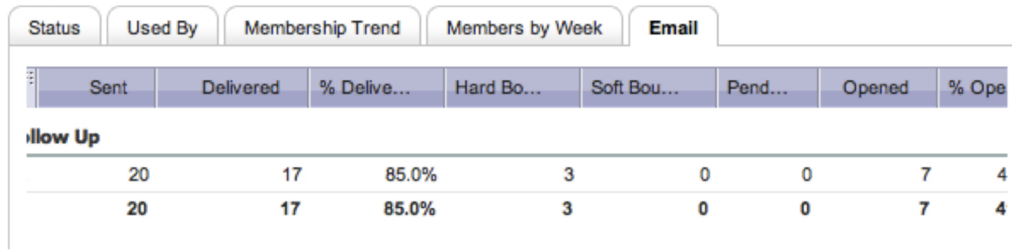
Create an Email Deliverability Report in Marketo

To fill in the detail, let's head into Marketo to create some reports.

Step 1: Decide which reports you need

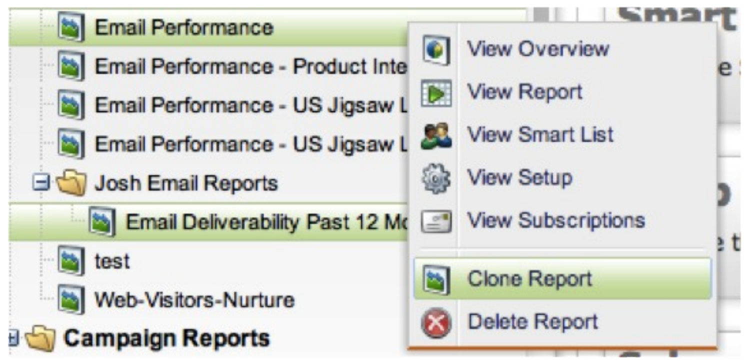
Do you want to watch each campaign? Or each Channel? Or just your overall metrics on a monthly basis? Choose the report which is best aligned with your data management process.

If you want to track an existing Smart Campaign, all you need to do is click on the Email tab on the main campaign console. This report will show you deliverability for all emails within the Flow for everyone who has gone through this campaign. Thus, you may want to create a custom Report to dig deeper.



Step 2: In Analytics, Clone the Email Deliverability Report

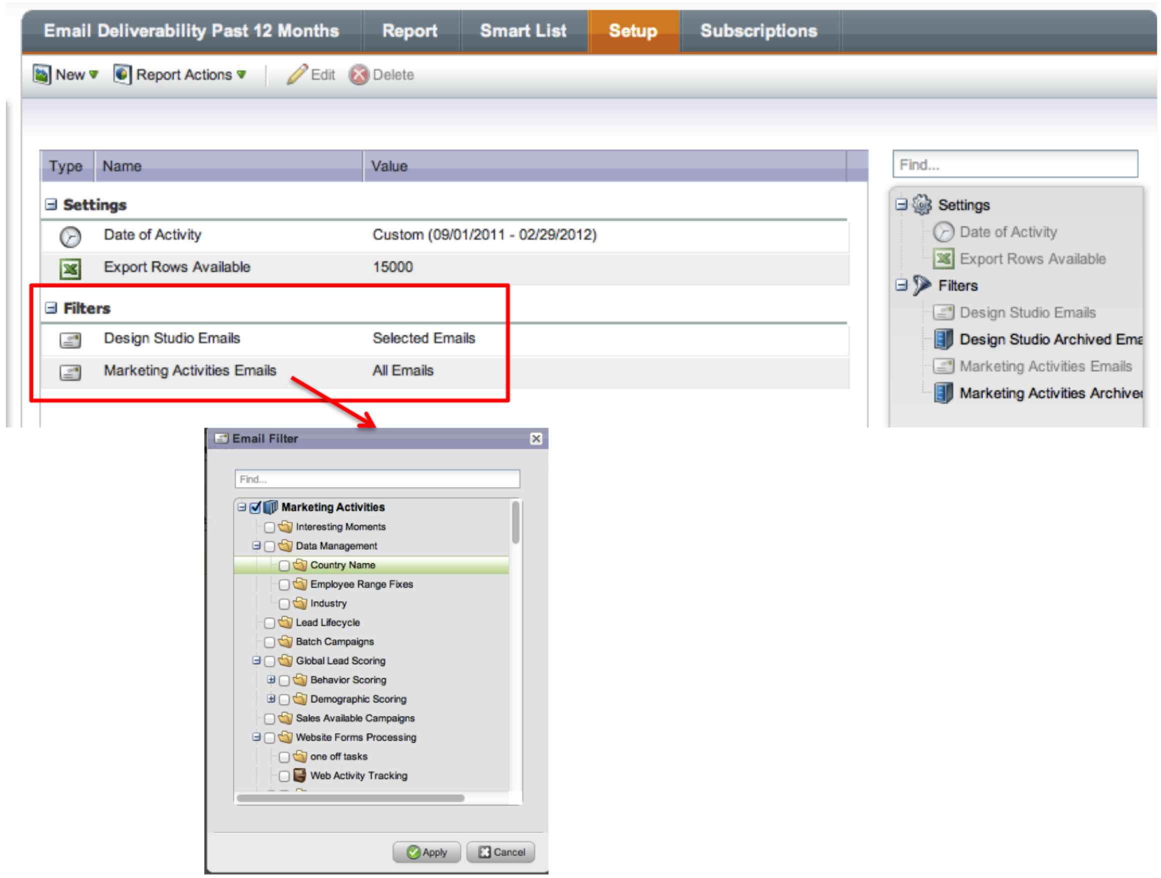
Clone the `Email Performance` report in Analytics.



Name the new report `Email Deliverability Past 12 Months`.

Step 3: Adjust the Setup to define what data ranges Marketo will use.

Under Date of Activity, right click, then change the date range to Last Year.

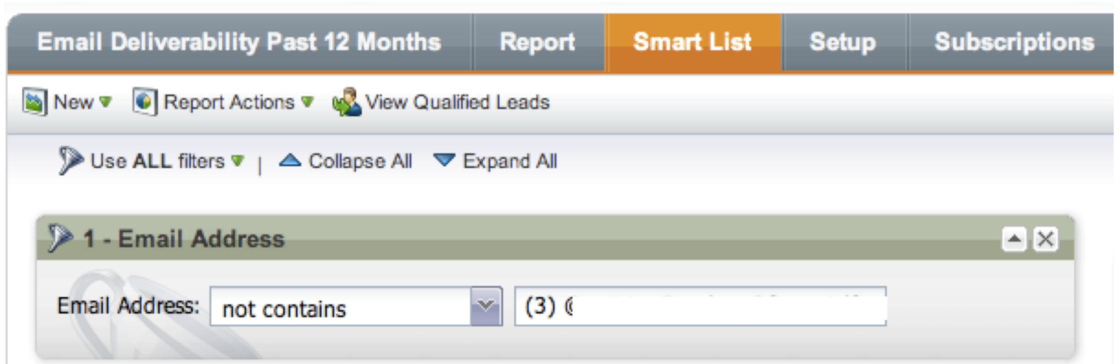


For specific channels, adjust the Design Studio Emails or Marketing Activities (Programs) emails.

Step 4: Smart List: define any lead count limitations to include or exclude.

You may want to exclude test leads or your own company's leads. You can also use the Smart List to focus on certain types of leads, Segmentations, or anything else.

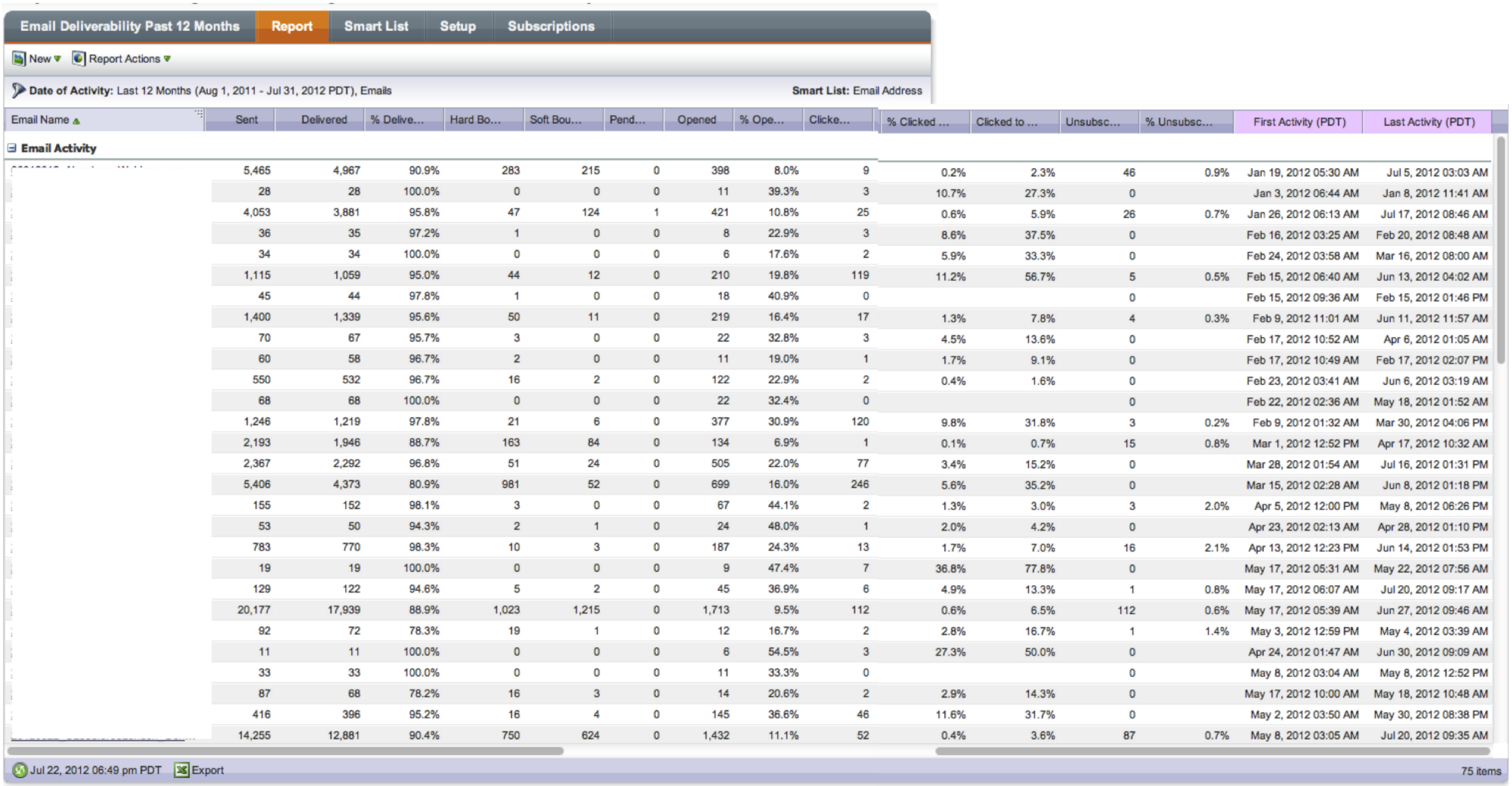
In this example we are ignoring data from our internal email domains, which are for tests only.



Step 5: Run the Report

Remember to scroll to the right to see the unsubscribe data. You can also sort by each column to focus on `Delivered %, Opens, Clicks, and Unsubscribe` rates.

Step 6: Export this list if you want to plug the data into the Excel sheet for further analysis.



Email Name	Sent	Delivered	% Delive...	Hard Bo...	Soft Bou...	Pend...	Opened	% Ope...	Clicke...	% Clicked ...	Clicked to ...	Unsubsc...	% Unsubsc...	First Activity (PDT)	Last Activity (PDT)
	5,465	4,967	90.9%	283	215	0	398	8.0%	9	0.2%	2.3%	46	0.9%	Jan 19, 2012 05:30 AM	Jul 5, 2012 03:03 AM
	28	28	100.0%	0	0	0	11	39.3%	3	10.7%	27.3%	0		Jan 3, 2012 06:44 AM	Jan 8, 2012 11:41 AM
	4,053	3,881	95.8%	47	124	1	421	10.8%	25	0.6%	5.9%	26	0.7%	Jan 26, 2012 06:13 AM	Jul 17, 2012 08:46 AM
	36	35	97.2%	1	0	0	8	22.9%	3	8.6%	37.5%	0		Feb 16, 2012 03:25 AM	Feb 20, 2012 08:48 AM
	34	34	100.0%	0	0	0	6	17.6%	2	5.9%	33.3%	0		Feb 24, 2012 03:58 AM	Mar 16, 2012 08:00 AM
	1,115	1,059	95.0%	44	12	0	210	19.8%	119	11.2%	56.7%	5	0.5%	Feb 15, 2012 06:40 AM	Jun 13, 2012 04:02 AM
	45	44	97.8%	1	0	0	18	40.9%	0			0		Feb 15, 2012 09:36 AM	Feb 15, 2012 01:46 PM
	1,400	1,339	95.6%	50	11	0	219	16.4%	17	1.3%	7.8%	4	0.3%	Feb 9, 2012 11:01 AM	Jun 11, 2012 11:57 AM
	70	67	95.7%	3	0	0	22	32.8%	3	4.5%	13.6%	0		Feb 17, 2012 10:52 AM	Apr 6, 2012 01:05 AM
	60	58	96.7%	2	0	0	11	19.0%	1	1.7%	9.1%	0		Feb 17, 2012 10:49 AM	Feb 17, 2012 02:07 PM
	550	532	96.7%	16	2	0	122	22.9%	2	0.4%	1.6%	0		Feb 23, 2012 03:41 AM	Jun 6, 2012 03:19 AM
	68	68	100.0%	0	0	0	22	32.4%	0			0		Feb 22, 2012 02:36 AM	May 18, 2012 01:52 AM
	1,246	1,219	97.8%	21	6	0	377	30.9%	120	9.8%	31.8%	3	0.2%	Feb 9, 2012 01:32 AM	Mar 30, 2012 04:06 PM
	2,193	1,946	88.7%	163	84	0	134	6.9%	1	0.1%	0.7%	15	0.8%	Mar 1, 2012 12:52 PM	Apr 17, 2012 10:32 AM
	2,367	2,292	96.8%	51	24	0	505	22.0%	77	3.4%	15.2%	0		Mar 28, 2012 01:54 AM	Jul 16, 2012 01:31 PM
	5,406	4,373	80.9%	981	52	0	699	16.0%	246	5.6%	35.2%	0		Mar 15, 2012 02:28 AM	Jun 8, 2012 01:18 PM
	155	152	98.1%	3	0	0	67	44.1%	2	1.3%	3.0%	3	2.0%	Apr 5, 2012 12:00 PM	May 8, 2012 06:26 PM
	53	50	94.3%	2	1	0	24	48.0%	1	2.0%	4.2%	0		Apr 23, 2012 02:13 AM	Apr 28, 2012 01:10 PM
	783	770	98.3%	10	3	0	187	24.3%	13	1.7%	7.0%	16	2.1%	Apr 13, 2012 12:23 PM	Jun 14, 2012 01:53 PM
	19	19	100.0%	0	0	0	9	47.4%	7	36.8%	77.8%	0		May 17, 2012 05:31 AM	May 22, 2012 07:56 AM
	129	122	94.6%	5	2	0	45	36.9%	6	4.9%	13.3%	1	0.8%	May 17, 2012 06:07 AM	Jul 20, 2012 09:17 AM
	20,177	17,939	88.9%	1,023	1,215	0	1,713	9.5%	112	0.6%	6.5%	112	0.6%	May 17, 2012 05:39 AM	Jun 27, 2012 09:46 AM
	92	72	78.3%	19	1	0	12	16.7%	2	2.8%	16.7%	1	1.4%	May 3, 2012 12:59 PM	May 4, 2012 03:39 AM
	11	11	100.0%	0	0	0	6	54.5%	3	27.3%	50.0%	0		Apr 24, 2012 01:47 AM	Jun 30, 2012 09:09 AM
	33	33	100.0%	0	0	0	11	33.3%	0			0		May 8, 2012 03:04 AM	May 8, 2012 12:52 PM
	87	68	78.2%	16	3	0	14	20.6%	2	2.9%	14.3%	0		May 17, 2012 10:00 AM	May 18, 2012 10:48 AM
	416	396	95.2%	16	4	0	145	36.6%	46	11.6%	31.7%	0		May 2, 2012 03:50 AM	May 30, 2012 08:38 PM
	14,255	12,881	90.4%	750	624	0	1,432	11.1%	52	0.4%	3.6%	87	0.7%	May 8, 2012 03:05 AM	Jul 20, 2012 09:35 AM

Figure 3. Email Deliverabiity Report results.

Chapter Review

Self-Quiz

What is a Hard Bounce?

Does Marketo handle all bounces automatically?

What is a Spam Trap and why should I care?

Recommended Resources

Marketo Documentation & Community

Marketo Instructions for Branded Tracking Links

How Marketo Tracks Email [Marketo]

Marketo and Email Bounce Codes [Marketo] and a Discussion.

Shared IP Community Discussion [Marketo Community]

List of Shared IPs – be sure to add these to your firm's whitelist. [Marketo]

Getting Started with a Dedicated Email IP [Marketo]

Dedicated Email IP Quick Setup [Marketo]

Marketo's Email Performance Report documentation [Marketo]

Marketo's Email Policies [Marketo]

Maximize Your Deliverability with Tips & Ethical Tricks

Marketo's Email Deliverability Center [Marketo]

Strong Mail's Top 20 Tips [Marketo] - 2008

Throttling Example During an Email Campaign [Marketo]

Marketo Guide to Monitoring Email Deliverability. [Marketo– PDF]

Email Marketing Cheat Sheet [Marketo]

Killer Deliverability Tips [Marketo Community]

Email Marketing Glossary [Marketo]

Email Marketing Best Practices [Marketo]

Marketo Master's Deliverability Webinar [Marketo Community]

Image Blocking Issues [Campaign Monitor]

Email Design Tips [Campaign Monitor]

Migrate Bounce Lists to New Providers [Autumn Tyr-Sylvia]

Common Spam Words: [HubSpot] [SpamAssassin] [Sendblaster's List] [Mannix Marketing]'

It is not ok to opt in Out of Office Replies

Unsubscribe Footers in Marketo – yes, you have to have them!

Further Technical Reading for the Geeks

Anti-spam techniques [Wikipedia]

How to Whitelist with Postini [Marketo Community]

IETF RFC Standard on Response Codes [IETF]

Email Non Delivery Report [Wikipedia]

Tools & Services

Litmus.com

EmailOnAcid.com

MailChimp.com (paid version)

IBM Deliverability Package (Marketo is a reseller)

250ok – Blacklist Informant

GreenArrow

Benchmarking Data

MarketingSherpa's CMO Perspectives on Email Deliverability Report: [ReturnPath, Gated]

Marketo's Benchmark Survey [Gated, Requires Survey]
- Here's a sample from Marketo [PDF]
- Marketo's Benchmark Data from November 2011 [Marketo] [Slideshare]

ReturnPath's 2H 2011 Benchmark Data or Fill out their form. [ReturnPath, Gated, PDF]

HubSpot's Benchmarking from 7,000 Businesses (Nov 2012) [PDF]

SendGrid's Analysis of ReturnPath's Report

IBM Email Deliverability Report: [PDF, Gated] This is quite detailed. Marketo is a reseller of this tool.

HubSpot's Science of Email Timing [Slideshare]

Making Apologies

How to make an email apology for the big mistake. [Spear Marketing]

Why you need to check and recheck the smart list AND the Schedule Count. If 8MM qualify, you better be sure that's what you intended. Real life example from the New York Times ☺

Discussion on handling email mistakes. [LinkedIn]

Experts

Eric Hollebone's Guide to DKIM, SPF, and Branded Tracking

Autumn Tyr-Salvia [posts] – A special thank you for Autumn's help on this section.

Reputation Resources

Marketo Sender Scores (Overall) [Marketo]

The Sender Score Report [ReturnPath] vs. Benchmark

Are you on a blacklist?

Deliverability.com

Word to the Wise Blog

Chapter 20. How to do A/B Email Testing

At a Glance

Overview

So you discovered "AB testing" and finally realized statistics was useful after all. The good news is Marketo does all the hard calculations. The bad news is you have to tell it what to calculate!

Marketo enables you to compare versions of your emails to see which ones result in higher Opens, Clicks, or whatever else you want people to do when they read your email. The key metrics in most cases are Delivered, Opens, and Clicks and their corresponding percentages vs. Delivered. (This is how Marketo shows your data in the Email Performance Reports).

While Marketo enables you to do email AB tests, doing so is much different than landing page AB testing. In this section, we will walk through your options and show you how to run an actual email AB comparison.

What I talk about when I talk about AB testing

While I hear much talk about performing AB testing by marketers, not as many of us are doing these tests back at the office. Let's change that right now, with this chapter. First, let's review what AB testing is.

AB Testing of Email

1. The comparison of two or more emails to the same group of people, randomly selected;
2. The comparison of responses to one email by two or more groups of people;
3. The system designed to build, send, and report on 1 or 2.

To keep this guide simple, we will discuss comparing two different emails or two different groups' responses. We will not explore multivariate testing although you can try to do so on your own.

Key Concepts:

- Test the Null Hypothesis (H_0), which is always that there is no difference between Open Rate and CTR for the Control and the Experiment.
- A: Control: this is the original email. You may already have data on it too.
- B: Experiment or Test: this is the new design with a single change to make it different than the Control.

Best Practice: test one item or group at a time.

To setup a test properly, you need to have two things to compare. Your comparisons must be consistent, with one change at a time to be a valid test. Here is a table you can use for ideas. Note that you can only compare one cell at a time here. That is, “Compare open rates of different subject lines at one time of day,” or “Compare open rates of one subject line at two different times of day.”

What to Test	**Random Samples of a Single Group (choose one column at a time)**			
Email Attributes	Split Group	Geographic Split	Time of Day	Day of Week
Subject Line				
Salutation Personalization Types				
From Address				
From Name				
Headline				
Sub-headline				
1 or 2 columns				
New vs. Old				
Font in One Area				
Text vs. HTML				
CTA Copy				
CTA Color or Size				
CTA Placement				

Email Layout for AB Tests

As you can see, the combination can become a complex matrix very quickly, and we haven't even tried to explore Segmentations with Dynamic Content! For this chapter, however, we will focus on using regular lists and static content. For the examples below, we will change only the Subject Line.

Here are several options to test. This list is not exhaustive; you can test just about anything. Will you do me a favor though? Please only test one change at a time to ensure a valid comparison between emails.

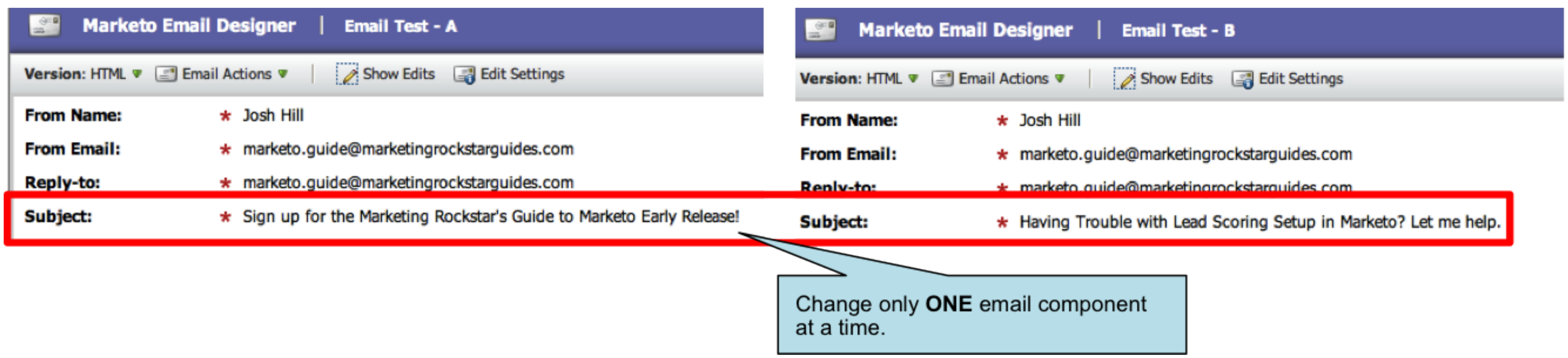
What to Test	**Null Hypothesis**	**What to Change**	**Considerations**
Subject Line	Subject line offer will not change Open Rate	Words used in offer Include Date/Time for Invitations	Avoid common spam words like “free” or “complimentary”

What to Test	Null Hypothesis	What to Change	Considerations
Salutation Personalization Types	Personal touch will not be different than a non-personal touch.	Include Dear {{lead.first name}} or {{lead.last name}} Not include personalization. Use Dear Colleague vs. First Name. Use "Dear Fellow Marketer" style for clubby inclusiveness vs. another option.	Is this email being sent to customers, a small group, a large group, on behalf of a sales person? Is this change in line with your brand personality? Is this change in line with your buyer personas?
From Address	Sending from a "personal" email address will not be different than a generic one.	events@jdavidhill.com vs. josh@jdavidhill.com newsletter@news.eiu.com vs. RobinLBew@news.eiu.com	What type of email is this? Who is it going to?
From Name	Sending from a person or a generic address makes no difference on Open Rate.	Josh Hill <josh@jdavidhill.com> Josh Hill <events@jdavidhill.com> From Our Chief Economist <news@news.eiu.com> Robin Bew <robin@news.eiu.com>	What type of email is this? Who is it going to?
Headline or Header Image	The above the fold image or Headline has no difference on CTR.	Using a fancy header image vs. H1 text, thin image vs. large image.	Remember to test one at a time.
Sub-headline	The above the fold image or Headline has no difference on CTR.	Use different sub-header text for a description of the email content. Sub-header vs. No Sub-header.	Using a sub-header line is not always necessary and may depend on the email's purpose.
1 or 2 columns	Using a single column or double column sidebar has no difference on CTR.	The CTA will be in the main body vs. sidebar.	Once you have a winner, then test CTA placement and multiple placements

What to Test	Null Hypothesis	What to Change	Considerations
New vs. Old	New template is not different on CTR than Old.	Your layout will be different	Not usually a good idea unless you are new to Marketo or need a big change.
Font in One Area	Headline font will not show a difference in CTR		
Text vs. HTML	HTML Template will not be different than Text for CTR	Try a wholly text email vs. your regular html template.	You might consider doing this for a specific type of email, such as on behalf of a sales person.
CTA Copy	The CTA copy is not any different for CTR.	This can be a button copy difference:	This is common to test on landing pages. Think of your buyer personas when deciding copy choices. Intellectual buyers might like contextual links vs. buttons. Find out what works for your audience!
CTA Color or Size	The color of the button makes no difference on CTR	"Download Now" vs. "Download" Or text links "Click here" vs. "download your copy today."	Also try button sizes.
CTA Placement	CTA placement in emails makes no difference to CTR	Button color: Red vs. Blue On Brand vs. Other Color	Similar to 1 vs. 2 column layout. This is ideal for invitations as well as Downloads with no registrations.
Multiple CTAs	Having multiple CTAs does not change the CTR	Is your CTA in the upper right corner, in the middle of the body text? At the bottom? Test middle of body vs. under header to start.	The rule of thumb is to have one request per email, so testing one request with multiple CTA locations is valid.

What to Test	Null Hypothesis	What to Change	Considerations
Forward to Friend/Social Buttons	Including social options makes no difference on CTR or Shares	Include social sharing buttons vs. no buttons. Include certain channels vs. others. Forward to Friend request vs. button.	

Here's an example of what you can do within Marketo's email designer. To setup the test properly, I am only comparing a change in `Subject Line` against a random 50/50 split of a single smart list.



For further ideas and visuals, take a look at Anne Holland's famous [WhichTestWon.com]() or the [Testing with the Stars]() (2012) presentation.

How do I properly setup a test for the right comparisons?

Without getting into statistical detail, it is important to gather the following pieces:

- Question (Hypothesis)
- A Control
- A Test
- Sample Set.

If you ask the right question of the Test, then you can find meaningful results, even without rigorous statistical analysis. For example:

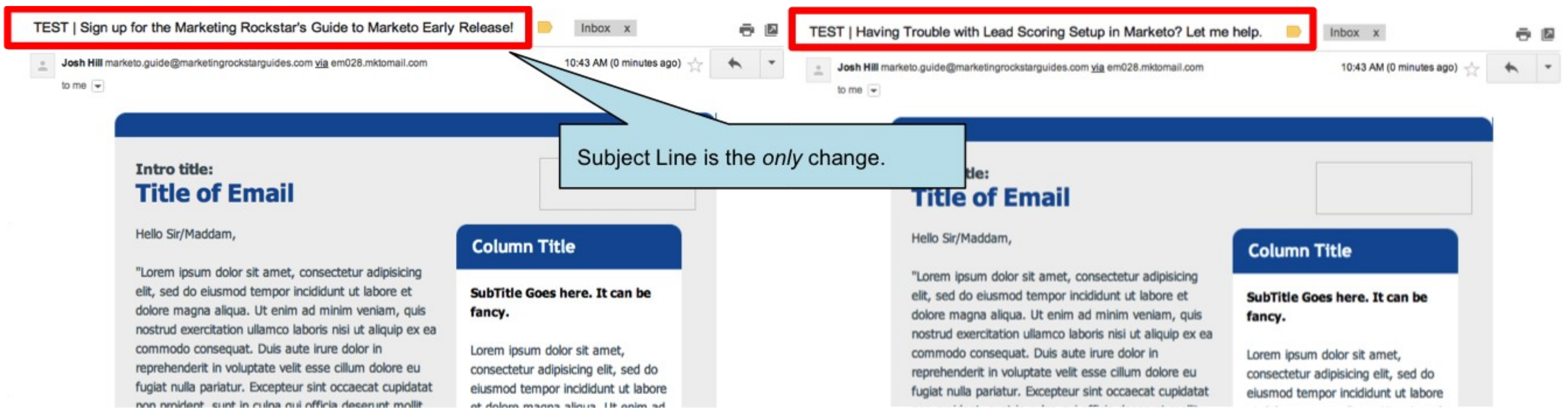
Hypothesis: H_0: Email B, the test, will not perform any better than Email A (the control).

Which we can translate to a more digestible Question:

Question: Will changing the Subject Line for Email A improve our Opens (or CTR)? (Thus, Email A vs. Email B).

I recommend starting with one metric or the other when you start out. It may occur that Opens increase, but CTR drops when you change the Subject Line. If you care more about CTR (getting people to a landing page) then you will want to check if the Subject Line matches the content inside. If not, then people may feel fooled by your Subject Line changes.

Be sure to test only one change at a time with the same group, randomly split.



For the examples, we will use this format to better distinguish what we are testing.

Type of Test: Components of the test.

Question to Answer: What are we testing against?

Summary: How we will proceed in Marketo

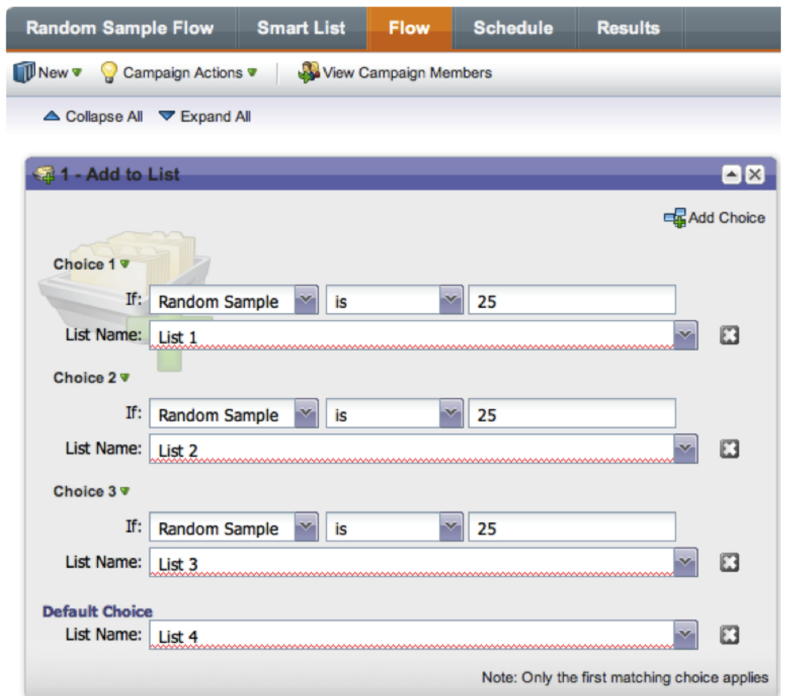
Steps: How to do this in Marketo.

Using the Random Sample Action

Now let me show you how to put words into action within Marketo. You first need to understand how the `Random Sample` Action and `Random Sample` Filters work. Then you will see how to use them with various situations using 2 or more emails and how to look at the results. Of course, it is possible to do more complicated work, so let me help you get moving toward that goal.

The `Random Sample` action is your best friend during email AB testing. This is the tool to make it happen and I will show you how to leverage it in several ways. `Random Sample` is available as a Filter and as a Choice in a Flow step.

`Random Sample` Flow Step will select the appropriate random percentage of those who qualify for the Campaign based on your Smart List.



Random Sample Filter in a Smart List (any type of Smart List) functions differently depending on how you set the logic filters. Here is how Marketo executes the Random Sample filter:

To pull a random sample of X% of Group Y leads:

ALL: Marketo executes all other filters first, then pulls a random sample of that group

```
Member of Smart List IN "Newsletter Subscribers" AND Has Opportunity IS
True AND Random Sample = 10%
```

Yields a random list of 10% of Newsletter Subscribers who also have Opportunities.

To pull a random sample of X% of Group Y or Group Z Leads:

ANY: Marketo executes the OR on all the other filters, and then pulls a random sample.

```
(Member of Smart List IN "Newsletter Subscribers" OR Member of Smart
List IN "Webinar Subscribers") AND Random Sample = 10%
```

Which yields random list 10% of anyone who is either Newsletter or Webinar Subscriber.

How to Build a Random Sample List for an AB Test

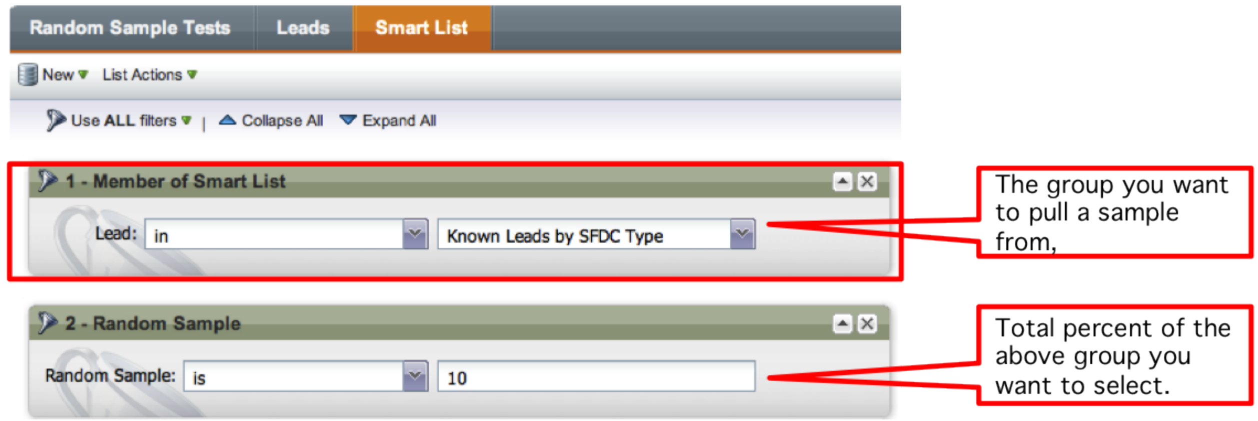
Step 1: Create a Smart List: Random Sample Tests

You can see another version of this from Jep Castelein at Marketo.

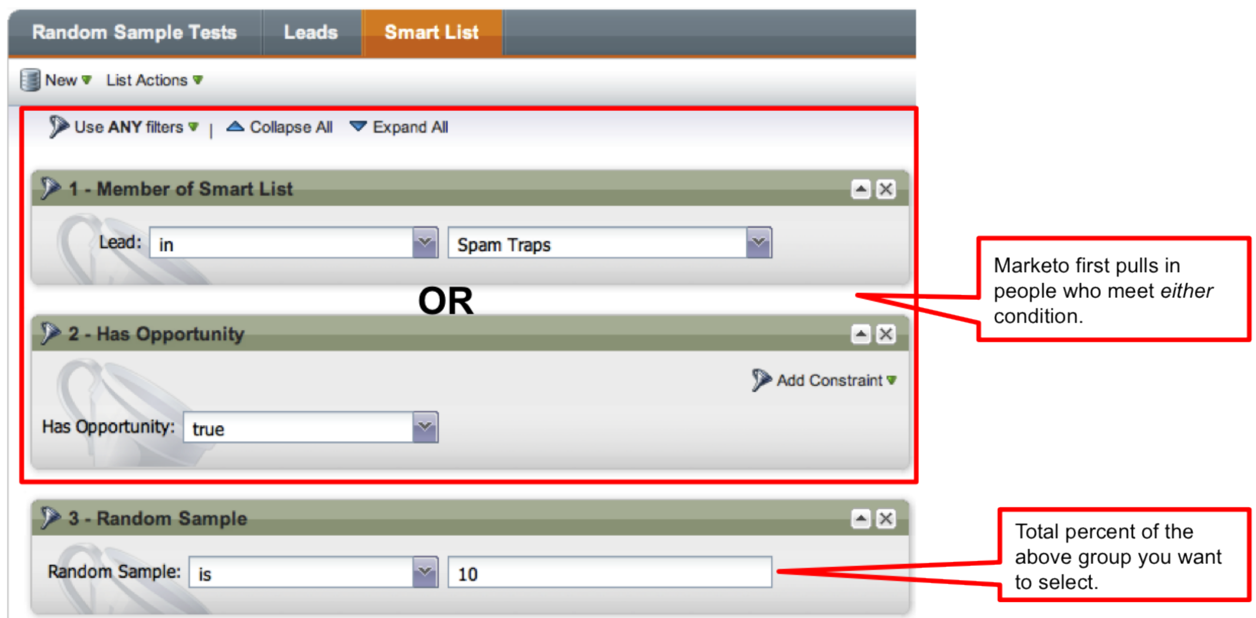
Step 2: Setup Smart List Criteria

The Random Sample filter is special. It runs *after all of the filters prior to it*. In this case, we are asking Marketo to pull in Known Leads by SFDC Type, *and then* pull 10% of *that* group randomly to build the end list.

When using a single filter or when using ALL filters (AND) condition.



If you want to use `Advanced` filters or `ANY (OR)` condition, be aware that Marketo will still execute the `Random Sample` *after* prior conditions are run. So in the example below, we ask Marketo to pull in anyone in the Spam Traps Smart List OR anyone who `Has Opportunity=True`, then pull a random selection of 10% of the group bounded by the red box.

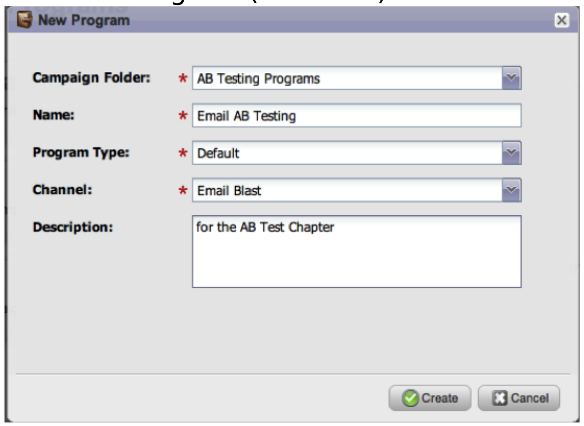


Create Lists of Random Sample for Test Groups

If you want to create a more complicated test, perhaps across a drip campaign, then you will want to create a set of randomly generated test group lists from an original group.

Let's say you had 4 emails to test. Each email has a different subject line, but they need to go to the same group for testing in pairs.

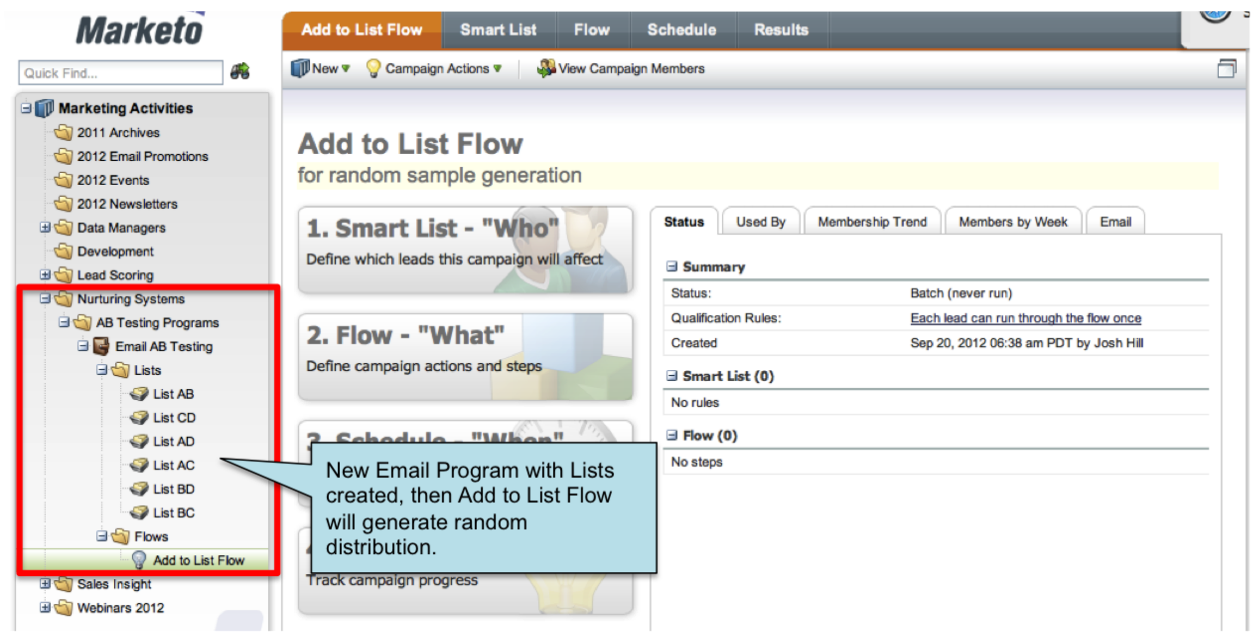
Create a new Email Program (or Folder)



Step 1: Create the Number of Lists You Want

Create the lists either in a Program or in the My Lists area under a folder called "MRG Josh Test Group ABCD" (you can name the folder something else ☺).

Test Group List Name	Email Variations
AB	AB
CD	CD
AD	AD
AC	AC
BD	BD
BC	BC

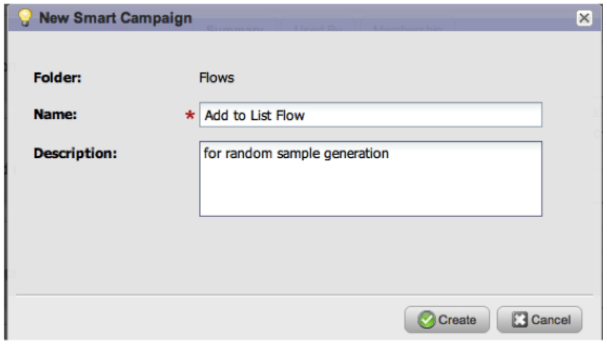


Step 2: Create a Smart List to Pull Data From

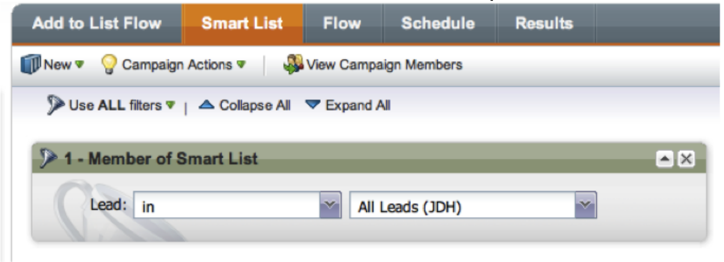
Or use an existing Smart List matching the demographics of the targets you want to email. This Smart List can be inside the Program or in Lead Database.

Step 3: Create a Smart Campaign Inside Your Folder or Program

Again, a Program is preferred in this case. This will be your Add to List Flow action.

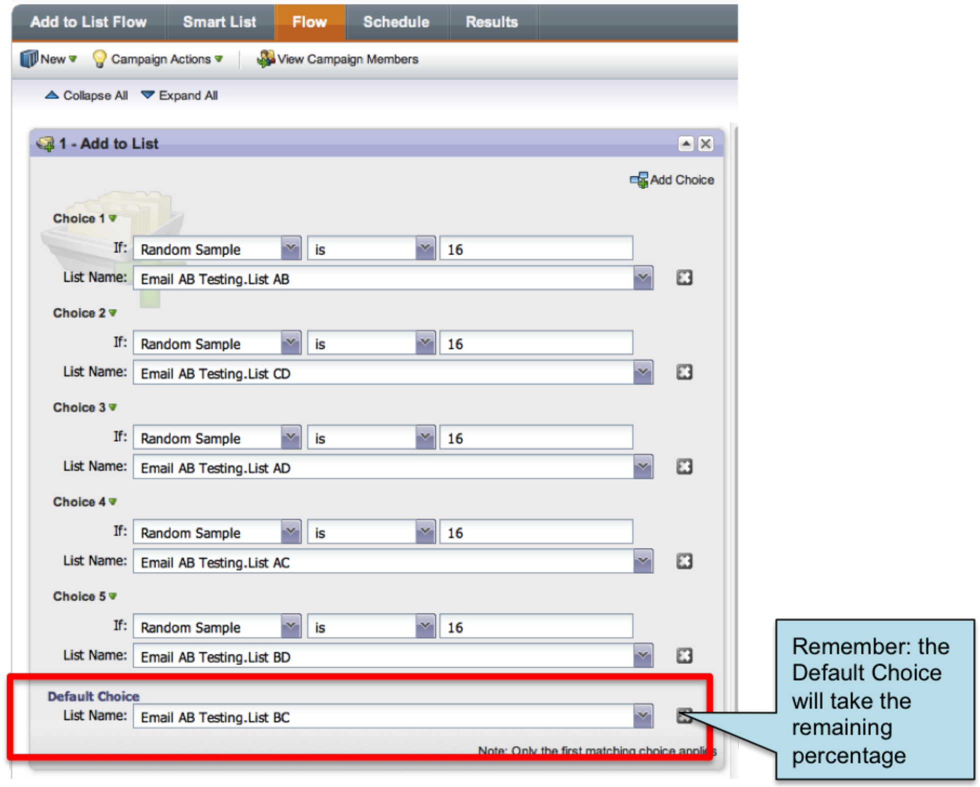


Step 4: Smart List: Add the Smart List from Step 3



Step 5: Flow: Add to List Flow Step with Random Choice

Since we have 6 lists, we need to randomly divide the list into 16.67% parts, but `Random Sample` does not handle decimals, so the Default Choice will generate a slightly larger list.



Step 6: Run Once

Now we have a set of lists, each with about 168 leads randomly selected.

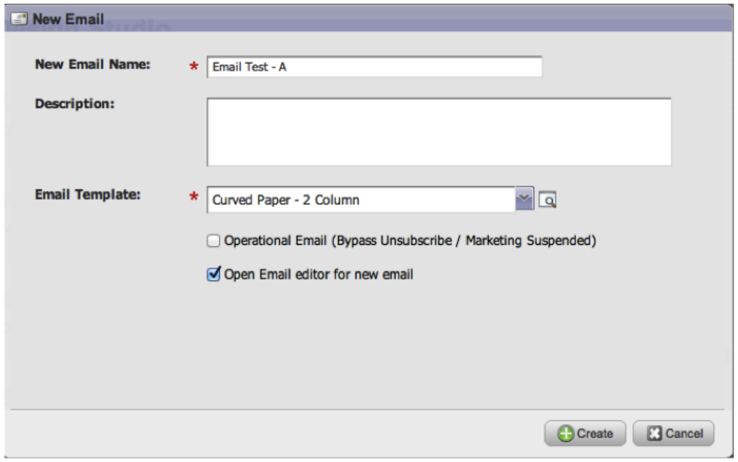
How do I build two emails to compare?

Creating an email is a topic better explained in [Marketo University](). The difference for the AB test is you need at least two variations of an email: A (Control) and B (Experiment).

The best thing to do is follow these simple steps:

Step 1: Create the Control Email

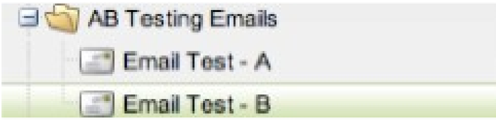
I bet you have dozens of existing emails you can use here. Let's call this `Email A`.



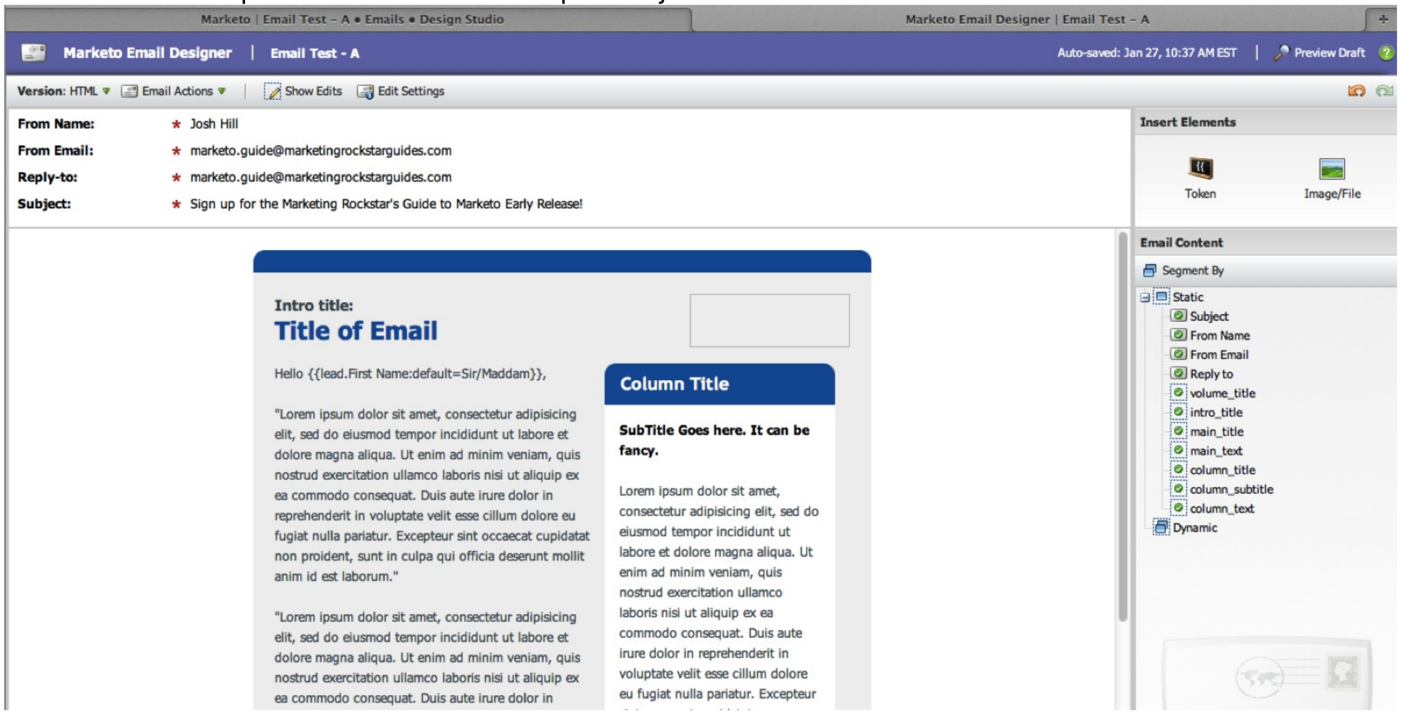
For an AB test, you may want to follow a naming scheme like

`20130111 Video Offer – A`

`20130111 Video Offers – B`

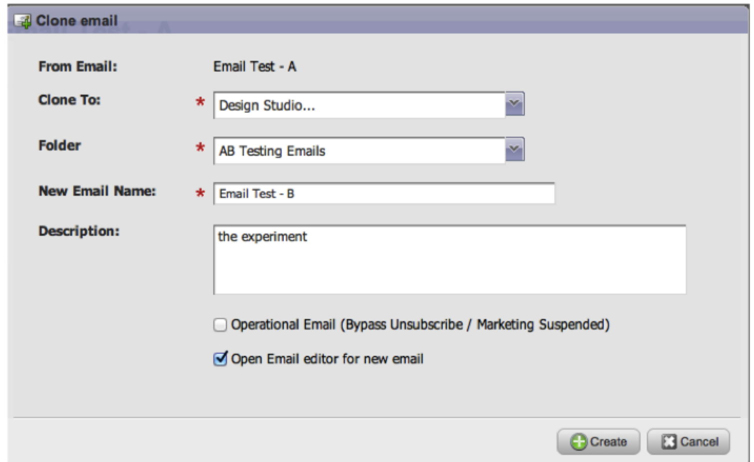


Step 2: Give Email A a Unique Subject Line



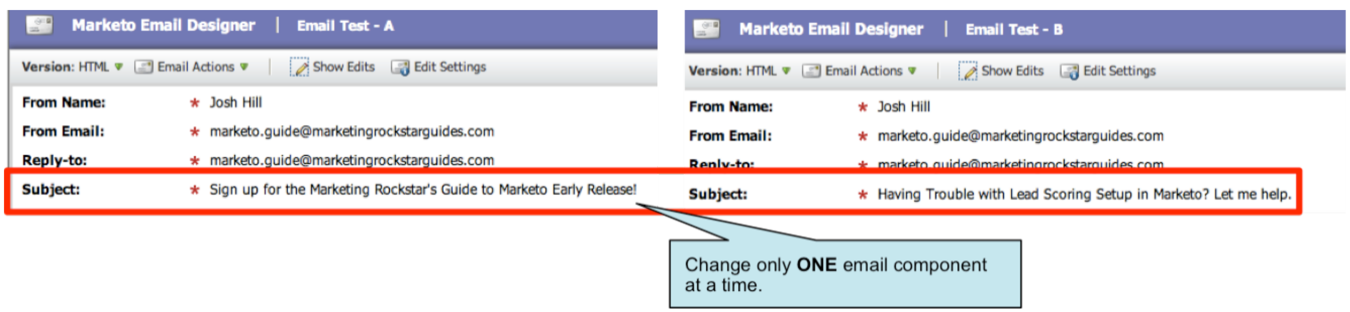
Step 3: Clone the Control Email

Clone Email A and name this Email B. This is the experiment email that you will adjust in one small way. (Assuming you are doing an Email Change Test).

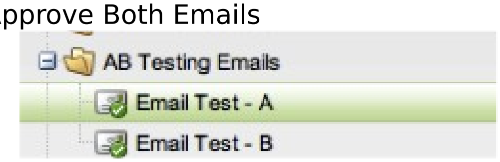


Step 4: Make the Change in Email B

Choose a single item to change in this email. For this test, let's change `Subject Line` to something else. Maybe that guy in the mailroom had a quirky idea you will try.

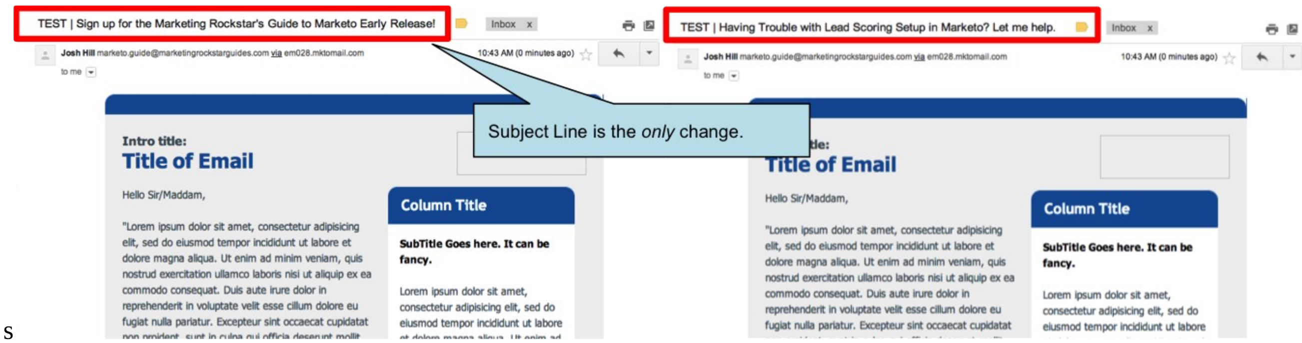


Step 5: Approve Both Emails



Step 6: Send the Emails

Use one of the techniques above to test the two emails against a single group. Here I sent both emails as a Test Email. If you compare them side by side, you will see the only change is the `Subject Line`.



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How Do I Control Email Send Timings in Marketo?

You can use Marketo to manage the timing of emails in a variety of ways:

- Schedule a campaign (remember, it runs on the system time)
- Use geographic or time-zone segmentation or smart lists to break up large subscriber lists.
- Create smart lists based on Country, Region, or State to map to a time zone
- Use wait steps creatively.

Using Wait Steps to Control Send Times

Note: flow actions, campaigns, and activities are based on the System Time in Admin.

Wait Steps can be used in all sorts of ways. I could write a chapter just on different ways to use this flow step. Instead, let's talk about how to use these to control email timings for testing purposes.

There are three Use Cases:

- Testing Time of Day
- Testing Day of Week
- Testing Frequency of Emails

Testing Time of Day with the Same Email

To test the time of day, say 8am vs. 3pm, you could setup a single campaign with a Randomly Selected Group and at least two different emails.

You could also setup a series of campaigns to run at specific times, but your data will be across campaigns, which is harder to collate.

Step 1: Two Emails, AB

Step 2: One Campaign

Step 3: Smart List of Two Randomly Split Groups

Step 4: Use Send Email Flow 1

This will go out when you setup the Schedule for 8AM

Use Choice Step: If Member of List A then Send Email A

Do Nothing

Step 5: Drag in Wait Step

Set to Wait 7 Hours (until 3pm of the day the campaign executes)

Step 6: Drag in Send Email

Use Choice Step: If Member of List B, then Send Email B

Do Nothing

Step 7: Click on Schedule

Press Run Once and set the Run Time to 8AM for the intended day.

Step 8: Check the Email Tab Report

Go back to this campaign 1-3 days later to view the Email Report tab and compare the data. You should run several experiments before deciding your audience definitely wants one or the other.

Testing Day of Week Timing

You can use all the rules of thumb you want, but your audience is unique. Your message is unique (right?). So you may find that sending only on Tuesday, Wednesday, or Thursdays at 8:00am is not always a winning tactic. Why not try to test Webinar invitations sent on any day of the week? HubSpot found that Weekend emails and emails sent after 6pm are opened at a higher rate in many cases.

To do this you will have to split your group, preferably over 1,000 names, into 7 groups using the earlier Random Add to List technique.

Things you will need:

- 7 Emails Exactly the Same
- 7 Static Lists (Randomly seeded using the earlier technique)
- Webinar Program

Step 1: Create a Program

Clone or create the emails and lists you need in the Program.

Step 2: Create a Smart Campaign

Name this `2012MMDD - Webinar Invitation – Day of Week Test`

Step 3: Step 2: Go to Smart List

Bring in All 7 Day of Week Lists

Step 4: Click on Flow

Step 5: Drag in 7 Email Send Steps.

For each one, do

Choice 1 is Member of List X

Send Email X with a Default of Do Nothing.

Step 6: Add a Wait Step Between each Send Email

You should only need 5 Waits, one after the first Send Email, and none after the last Send Email.

The Wait Step must be configured based on your intended run time. If you will Schedule the Run on Monday at 8:00AM, then the Wait Step should say

Wait 24 Hours

Marketo will then always send the next email at 8AM on MTWRFSaSu. It is critical that you know when you will start the first Send Email.

Step 7: Schedule

Set the run to the intended time.

Step 8: Check the Email Tab Report

Go back to this campaign 1 week later to view the Email Report tab and compare the data. You may want to run this experiment with 3-5 Webinars to be certain of statistical validity.

NOTE: if you do not see any obvious differences after 1 or more experiments, then discount Day of Week as a factor for your email success.

Testing Frequency of Emails

Attempting to test the frequency of sending emails is more difficult. You may want to consider building this test into a nurturing program. To do this in a Program you can have the drip campaign send the email every 3 days, every 7 days, or every 2 weeks.

Assume we already setup a base Nurturing Program that we cloned into three separate Programs.

Step 1: Select a Smart List of Targets

Step 2: Create Three Lists Using the Random List Generation Technique

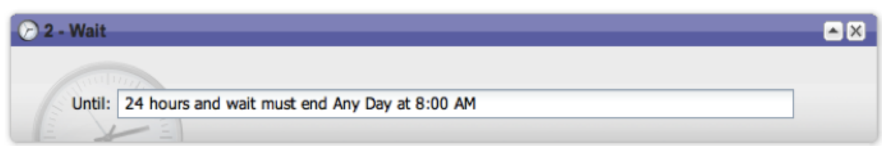
Group or List Name	Campaign and Purpose	Wait Step Required
Every 3 Days	Send Email Every 3 Days	Wait 3 Days Must End on M-F at X Time
Every 7 Days	Send Email Every 7 Days	Wait 7 Days Must End on M-F at X Time
Every 14 Days	Send Email Every 14 Days	Wait 14 Days Must End on M-F at X Time

Step 3: Smart List

Add each List to the Appropriate Campaign.

Step 4: Flow: Add Wait Steps as Shown in the Table

For this to work properly, you must use the Wait Until setting on the Wait Step. I suggest using `Must End On` a particular day of the week and time so there is consistency between campaigns.



Step 5: Schedule: Activate the Campaigns

Once you run the Campaigns, you can watch the reports on each one. Once all the programs are completely exhausted, you can compare your Success rates as well as your Unsubscribe rates.

Time Zone Segmentation

There are a few options for time zone or regional split testing. Aside from sending a newsletter to each region at the best time for each region, you may want to see if different countries react differently to the same email.

Let's say you believe your emails require different copy and layout for each region: North America, Europe, and Asia. Your manager says, "Prove that we get more Opens with targeted regional emails before we spend more money on copy and layout." So you decide to start testing by dividing your Global Newsletter into Regional Groups.

Step 1: Create Sub Lists of Your Subscriber List

Best Practice: use Segmentations for Regional or Time Zone splits.

If you want to do time zone splits, then you'll need to break out your Subscriber List by global region or country, etc. You will end up with sub-sets of the Subscriber List. Then you could setup your campaign to do this in stages by list location or to do separate campaigns for each time zone.

Step 2: Consider Cloning the Email

You could also clone the email to be named Time Zone 1, 2, 3...so your email performance report would be easier to generate. (As opposed to running separate campaigns).

Conducting Email A/B Testing in Marketo

Now that you know how to properly setup an AB test and how to use the key `Random Sample` tools, you can try out a quick AB Email Test. Consider testing this on the Marketing Team or a Company Announcement, or just a small invitation before you try your skills out on 50,000 leads.

Fast AB Email Test

We have the basics down, so let's get your first AB Test out to the world!

Sending Two Or More Emails To The Same Group

This tests whether or not Email A or Email B performs better with a single target audience.

Step 1: Create at Least Two Emails

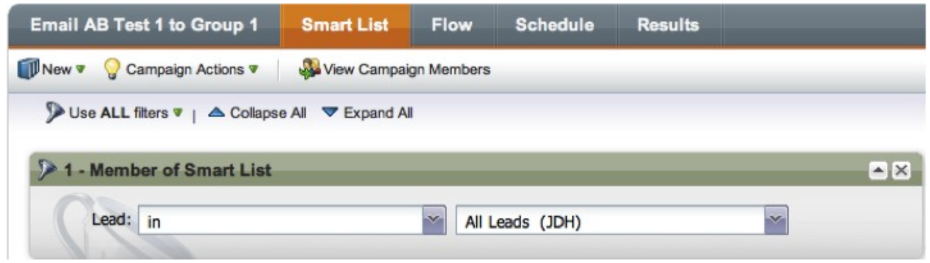
We'll go into designing them later, so I'll assume you have two identical emails with two different Subject Lines.

Step 2: Create a Smart Campaign

Name it `Email AB Test 1 to Group 1`

Step 3: Smart List

Right now we just want the entire target group. No `Random Sample` filter is needed.

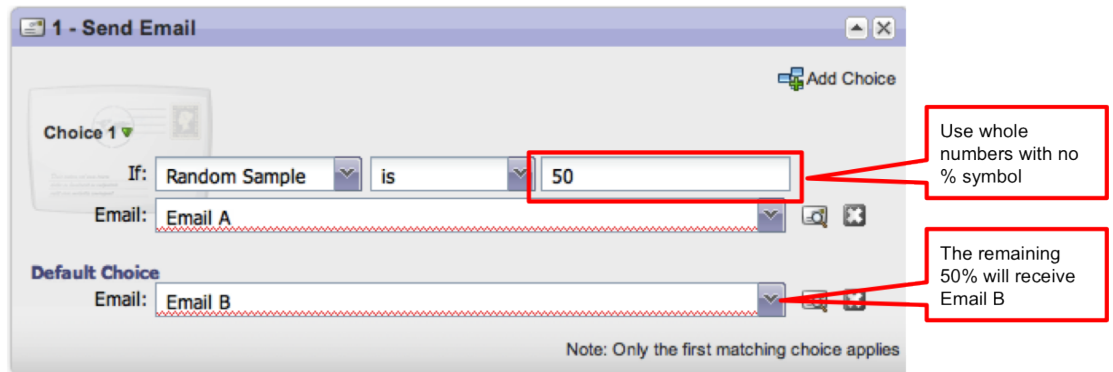


Step 4: Flow

Drag in `Send Email`, then Add Choice `Random Sample IS XX%`

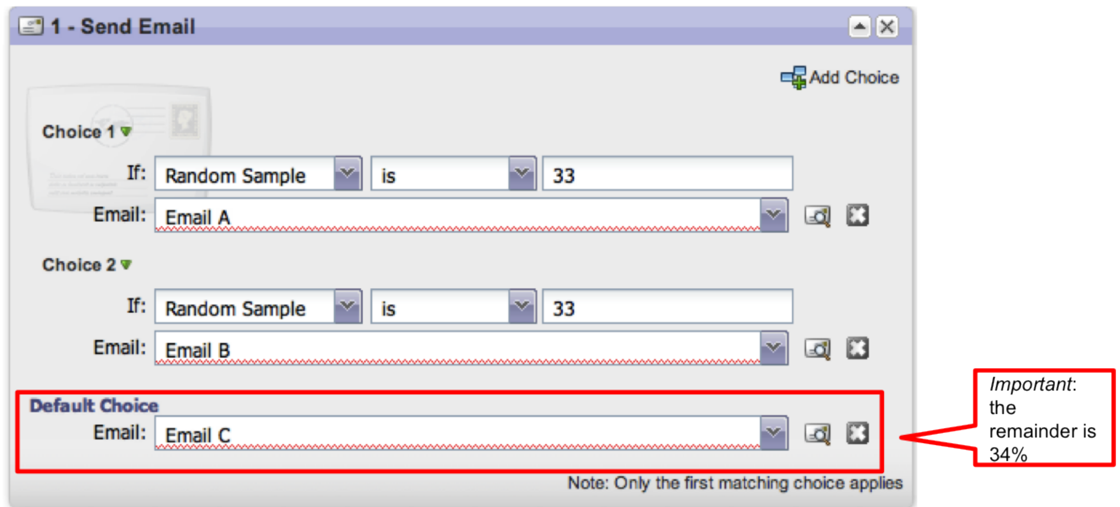
To send two emails to the same group of people in a random split test you can use this [flow action](#):

Note: You can only use whole numbers to represent the percentage here. e.g.: 38%, not 37.5%



Notice that Marketo will Send Email A to a Random Sample of 50% of the group, then Send Email B to a Random Selection of the rest of the group, which will be everyone else `Choice 1` did not pick up.

If you want to send 3 emails to the same group, you simply add a second choice option, allowing 3 emails to go to three randomly select divisions of the same group. Please note Marketo does not use tenths of a percent here. Use whole numbers.



The `Random Sample` will accept only whole numbers (no decimals). Bring a calculator! If you want to send 4 emails, you will have 3 Choices with 1 Default Choice for a total of 4 options.

Step 5: Schedule

Verify the count. Keep in mind that the count will be for everyone who qualified for the Smart List. There will be no random sample explanation here.

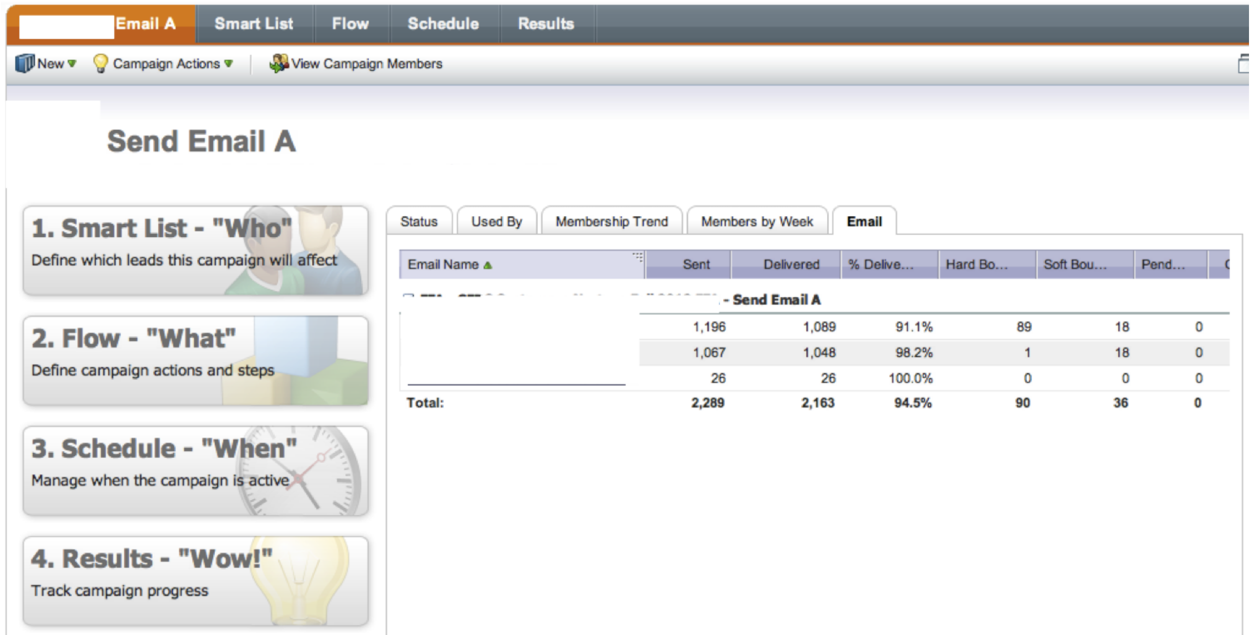
`Qualification Rule: Each Lead May Run Once.`

Step 6: Press Run.

Wait for the campaign to complete its run.

Step 7: Click on the Campaign Name Tab

On the overview screen, select the Email tab to see the Email Performance report for just the emails in this campaign. It is best to wait 1 – 3 days for the results to come in. It should be easy to compare the two emails by Opens, Clicks, and Unsubscribes.



More AB Email Testing Examples

As you have seen, there are dozens of variations possible with just emails. To make a few of these options happen in Marketo requires a bit of thought. I will show you a few recipes that others and I have used. For all examples, please check the `Campaign Email Tab` or `Email Performance Report` to examine the results.

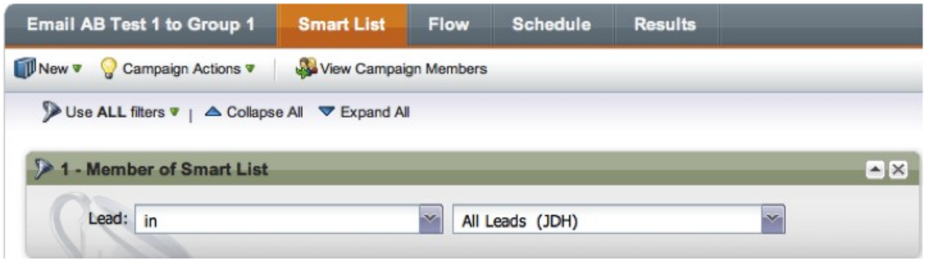
"Automatically" Send the Winning Email Flow

This setup is from a discussion by Marketo Champion Kimi and confirmed by many others. You want to automate the entire AB testing and winning process, right? You can *almost* get there with this setup. The example is to test two Subject Lines with a small sample of a target audience, but the send winner automatically to the rest of the group.

Step 1: Create a New Campaign

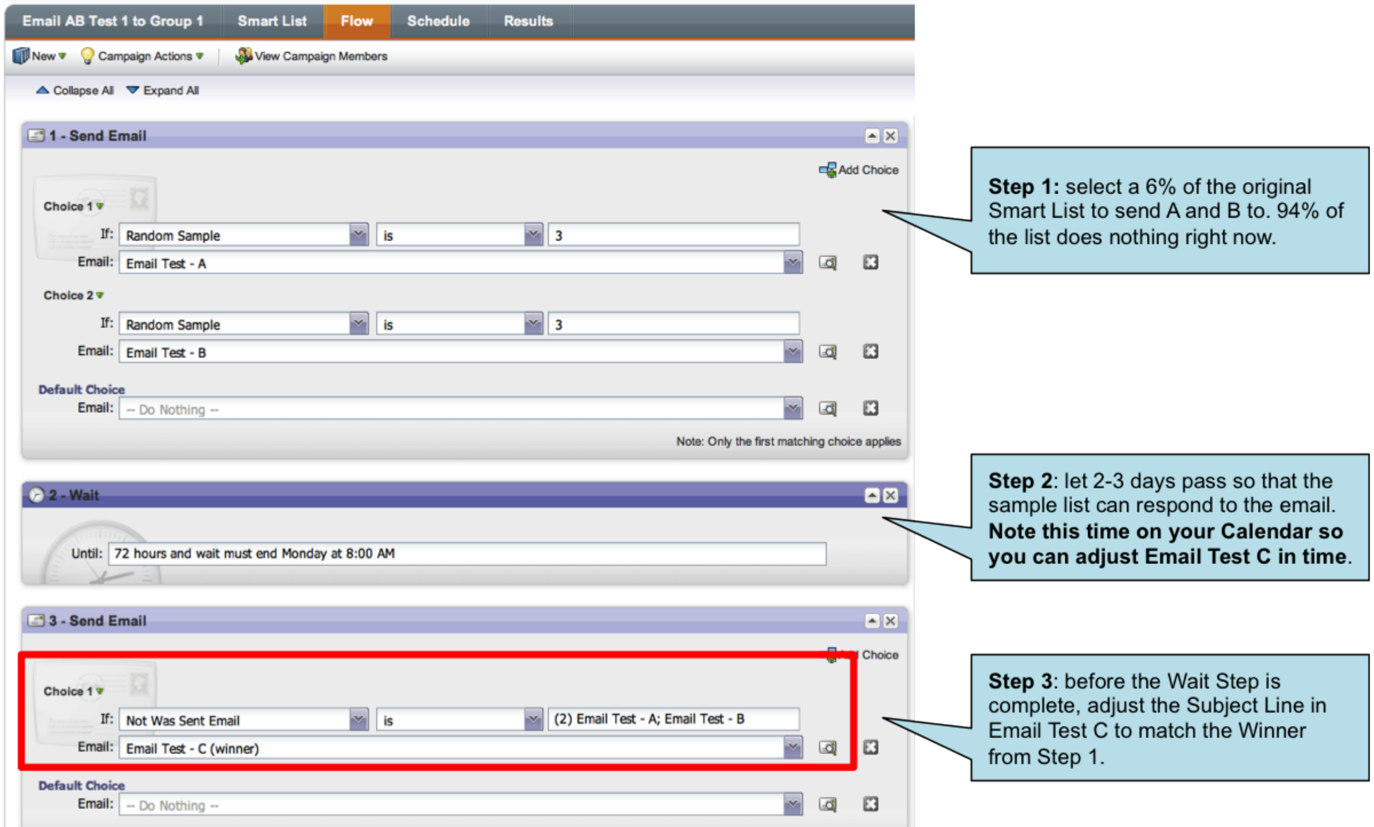
Step 2: Smart List

Bring in the Smart Lists or Leads you want. In this case, I am bringing in all my leads.



Step 3: Flow

You will setup the following Flow steps. You must set an appointment in your calendar to come back to verify `Email Test – C's Subject Line`.



Step 4: Schedule

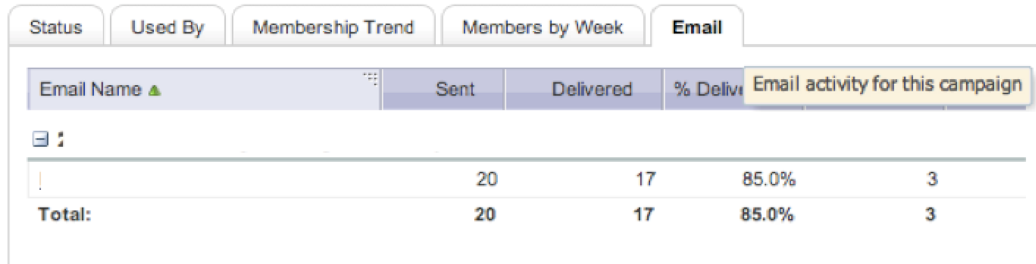
This is a batch campaign, so set it to

`Qualification Rule: Each Lead Runs Once`

`Run Once.`

Step 5: Review the Results

You can do this by visiting the Email tab on the Campaign. You can also setup an Email Performance Report with all three emails selected. (Remember to refresh!).



Step 6: Adjust Email Test C's Subject Line

Be sure to do this before the `Wait Step` is completed!

Step 7: Re-approve Email Test C

You must approve the draft changes or the Campaign will use the earlier version.

Step 8: Review the final Results

View your success on the Campaign Email tab or the Email Performance Report.

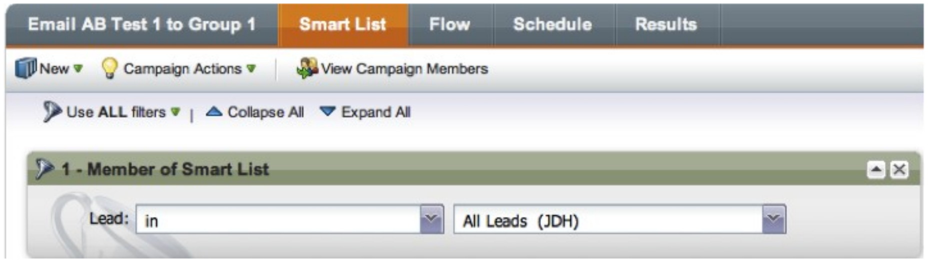
Split Test 1: Test 2 Emails, 1 Group: Flow Based Random Sample

Type: 2 emails: A and B; 1 Group to Randomly Split.

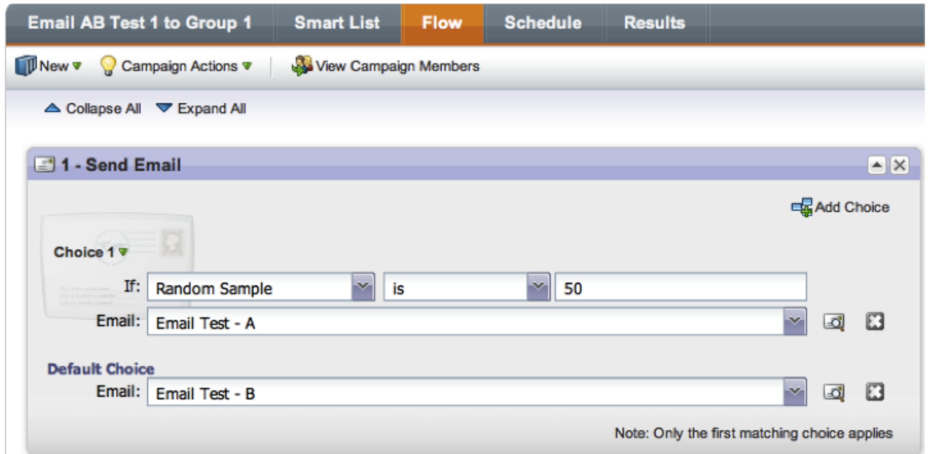
Question: Will this group respond better to Email A or Email B?

Summary: The fastest way to test two emails with one group is to Add Choice If Random Sample to your Send Email action. Then you will tell Marketo to send Email A to a random sample of 50% of the Smart List, and Email B to everyone else. (You can also program this into Nurturing Flows for a basic automatic test).

Step 1: Smart List



Step 2: Flow



Split Test 2: New Newsletter Layout Small Sample Test

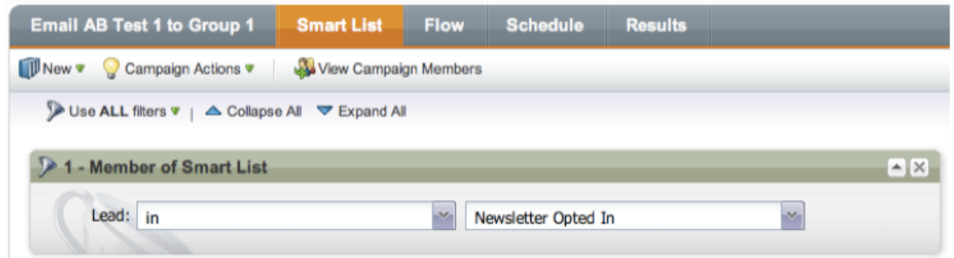
Type: 2 emails: A and B; random sample of 10% of Group

Question: Will our newsletter list respond better to Email A or Email B?

Summary: You will need two version of the Newsletter. You will then select 10% of the Newsletter Opted In Smart List by using Random Sample IS "5%" for each Send Choice. An alternative method is to randomly select 10% of the entire list, then send out the two emails in a 50% split. I recommend something like this to help you safely test new ideas in front of a small audience.

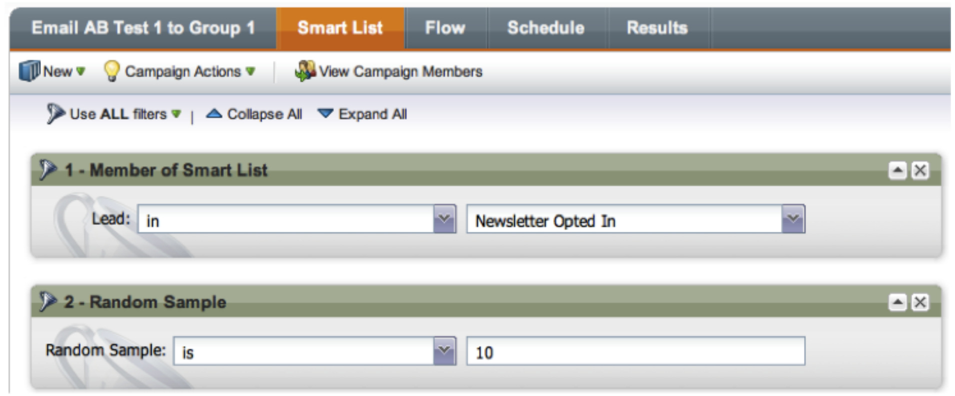
Step 1: Smart List Option 1

Pull in the entire list first.



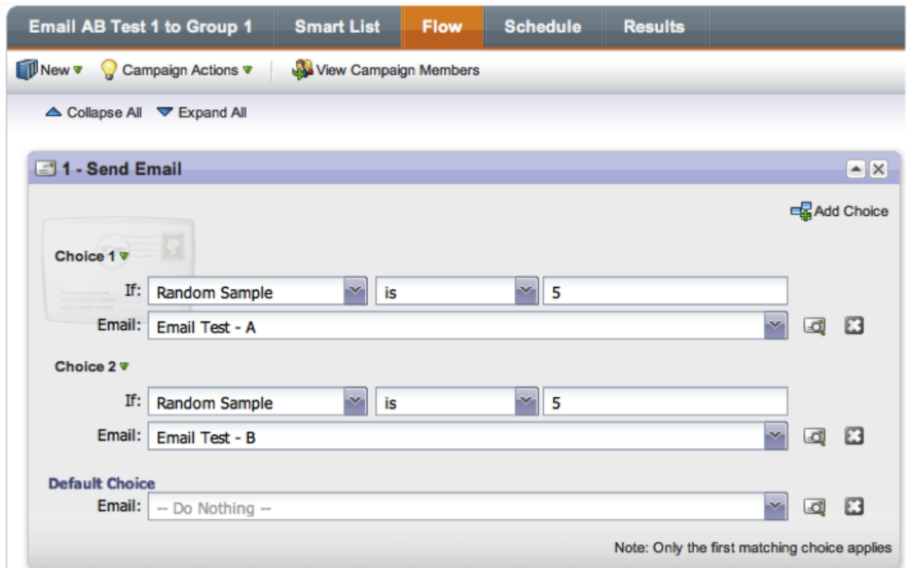
Step 2: Smart List Option 2

You can pre-select 10% of the list.



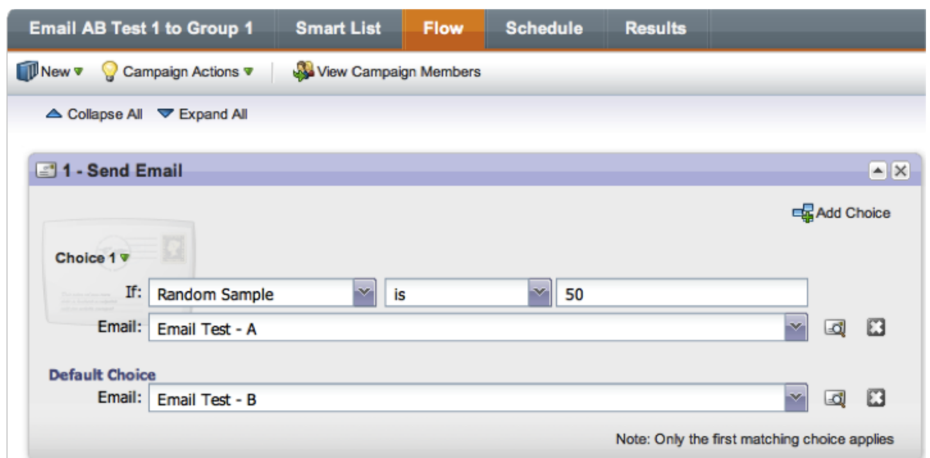
Step 3: Flow Option 1

If you brought in the entire list, just send each email to 5% of the list.



Step 4: Flow Option 2

If you pre-selected 10% of the list, then you should use the 50% option.



Split Test 3: Compare Time of Day with a Wait Step

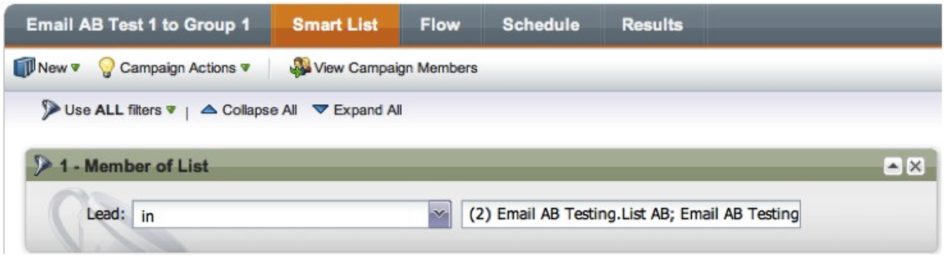
Type: One email, two separate groups

Question: Will this group respond better to Email A at 8:00am or at 3:00pm?

Summary: In this test, we will compare time of day using one email sent to a 50% random sample of a smart list.

Step 1: Smart List

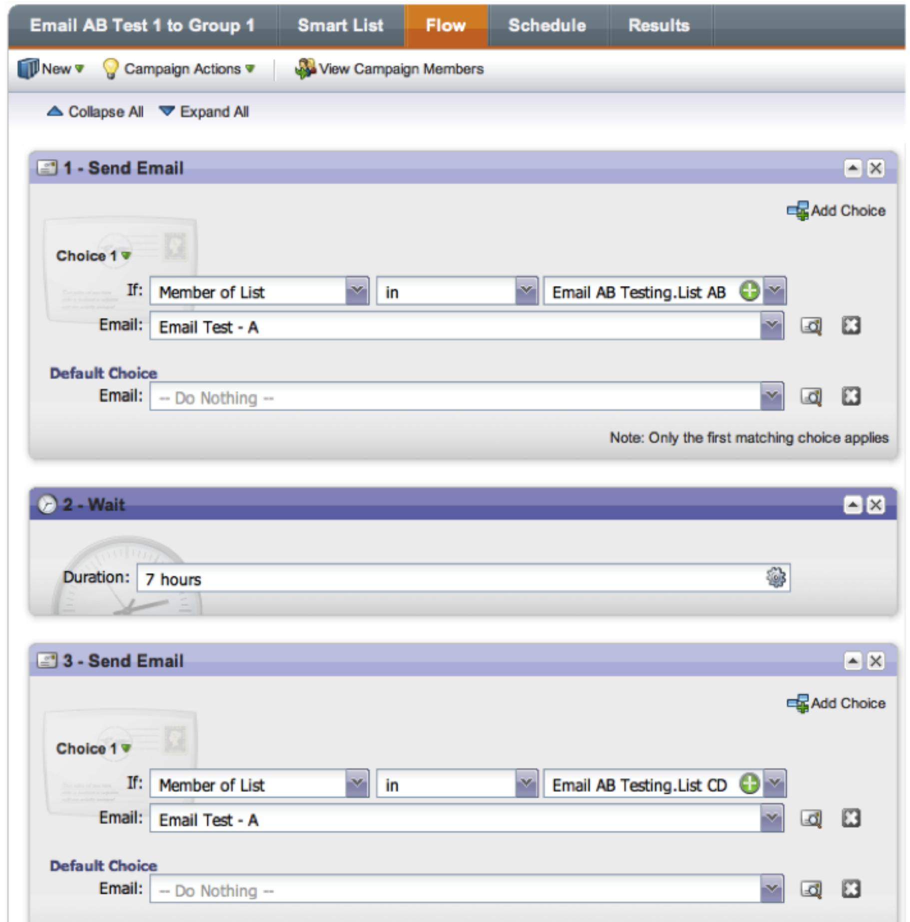
You should split your main list into two randomly generated lists. Bring those in.



Step 2: Flow

You will send List 1 `Email A` at 8:00AM, then List 2 will receive `Email A` 7 hours later at 3:00PM based on your `System Time`.

You could also specify another time or day if you preferred to test Day of Week.



Split Test 4: Compare Day of Week with a Wait Step or Schedule

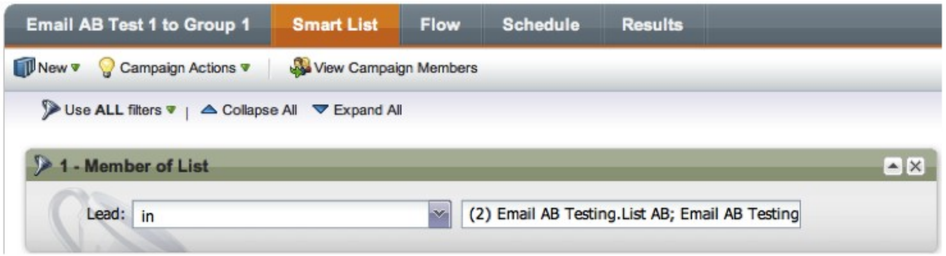
Type: One email, two separate groups

Question: Does this group respond better to Email A on Mondays or Tuesdays?

Summary: In this test, we will compare one email sent to a 50% random sample split of a smart list. Your flow steps will include a `Wait Until`, which will send the email at the same Time of Day on a different Day of the Week.

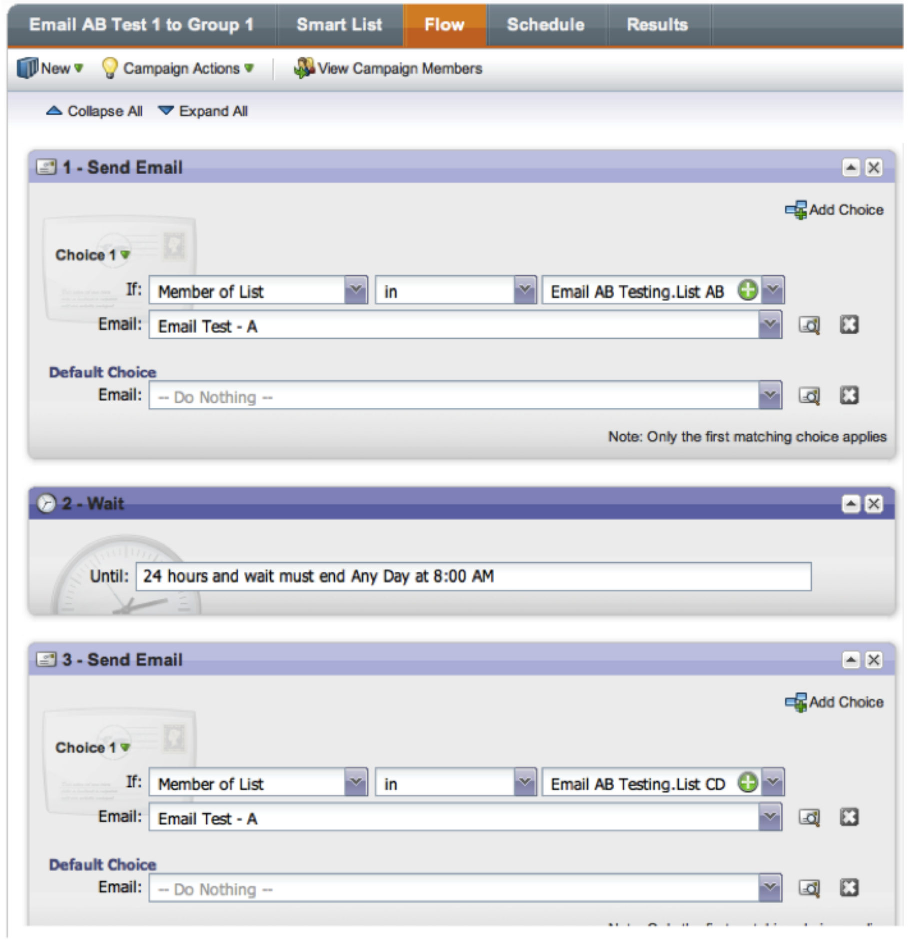
Step 1: Smart List

You should split your main list into two randomly generated lists. Bring those in.



Step 2: Flow

This flow differs slightly from Example 2. Here we use a `Wait until` step that sends `Email Test B` to the members of List 2 at the *same time* on the next day. If you wanted, you could add 7 randomly selected lists and test each Day of the Week in a single flow.



Split Test 5: Geographic List Split Comparison

Type: One email, three separate groups: Americas, EMEA, and Asia.

Question: Which region responds best to Email A?

Summary: We will compare a small sample from America, Europe, and Asia leads to see if they respond differently to the same email, in English, sent at 8:00am local time for the primary cities' time zone (New York, London, and Hong Kong). For example, you might test which region has a higher CTR for a webinar invitation at a time favoring EMEA and Asia. Is your content compelling enough for America?

Step 1: Smart List

Test A: Clone this email to three emails and then send it with the same (or different) flow so you can see the reporting: `Email – Americas; Email – EMEA; Email – Asia`. You should have already setup a Segmentation or Static List for each region. Using those lists, you can select a Random Sample to place in a new set of lists. In this example, I am using Static Lists. Bring in all the Lists you need.

Test B: three campaigns, three separate smart lists for sending the same email at the best time for each region.

Step 2: Flow Options

Test A: single flow, single campaign to send three separate emails which will appear on the Campaign's Email report. This flow will send all three emails at the same time, attempting to balance the time zones.

Test B: three campaigns, three flows to send the same email to each region at the best time for each region.

The screenshot below shows what Test A might look like:

Step 3: Reporting Options

If you run Test A only to see which region responds best to the Email, regardless of time sent, you will need to run a Smart List that says `Clicked Link in Email A AND Member of List IN "EMEA"` and similarly for each region and metric.

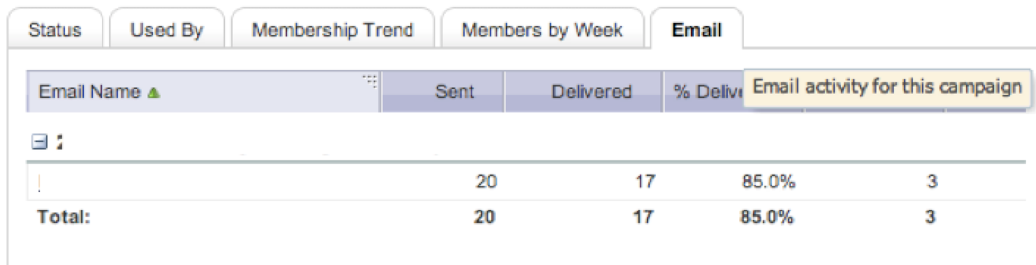

Email AB Test 1 to Group 1
Smart List
Flow
Schedule
Results
New
Campaign Actions
View Campaign Members
Collapse All
Expand All
1 - Send Email
Add Choice
Choice 1
If:
Member of List
in
Newsletter - EMEA
Email:
Email Test - A
Default Choice
Email:
-- Do Nothing --
Note: Only the first matching choice applies
2 - Wait
Duration "5 hours" With Type "Duration" With D
3 - Send Email
Add Choice
Choice 1
If:
Member of List
in
Newsletter - Americas
Email:
Email Test - A
Default Choice
Email:
-- Do Nothing --
Note: Only the first matching choice applies
4 - Wait
Duration "12 hours" With Type "Duration" With I
5 - Send Email
Add Choice
Choice 1
If:
Member of List
in
Newsletter - Asia
Email:
Email Test - A

Reporting on AB Testing

AB testing requires outcome reporting. In order for you to say the null hypothesis is wrong—that there is no difference between the page conversions, you need a report. I recommend visiting the Using Analytics Chapter for details on how each report works.

Campaign Email Report Tab

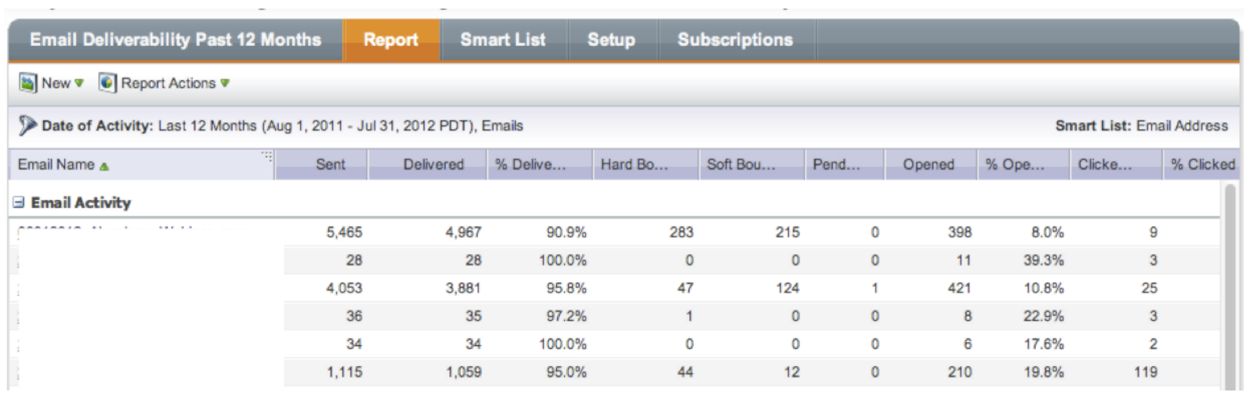
Each campaign has an Email Tab that is equivalent to an [Email Performance Report](#) on just this campaign. If you did the AB Email using a single flow, all the emails you sent will appear here.



Email Name	Sent	Delivered	% Deliv	
	20	17	85.0%	3
Total:	20	17	85.0%	3

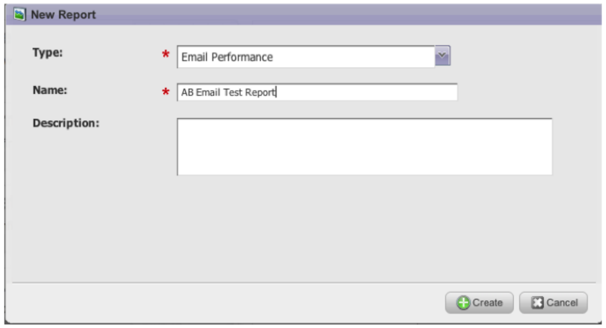
Analytics: Email Performance

You can clone and customize any number of these reports to show you data on the emails you sent in a specific time frame. Please read the section How to Use Analytics and Managing Your Reputation for details on this report.



Email Name	Sent	Delivered	% Delive...	Hard Bo...	Soft Bou...	Pend...	Opened	% Ope...	Clicke...	% Clicked
	5,465	4,967	90.9%	283	215	0	398	8.0%	9	
	28	28	100.0%	0	0	0	11	39.3%	3	
	4,053	3,881	95.8%	47	124	1	421	10.8%	25	
	36	35	97.2%	1	0	0	8	22.9%	3	
	34	34	100.0%	0	0	0	6	17.6%	2	
	1,115	1,059	95.0%	44	12	0	210	19.8%	119	

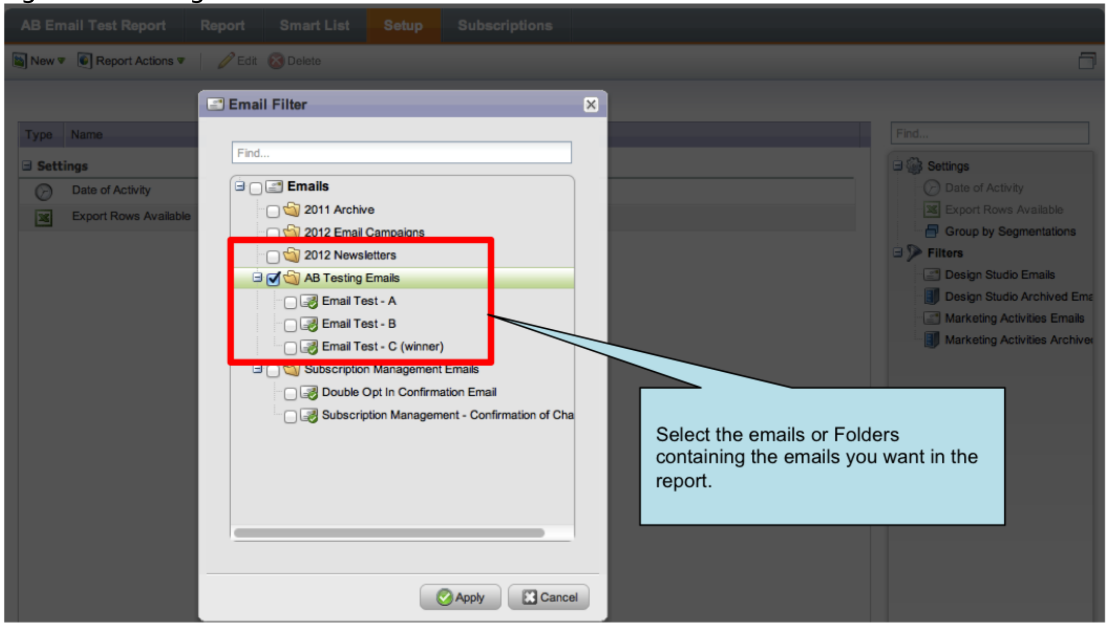
Step 1: Create a New Email Performance Report
Call it `AB Email Test Report.`



Step 2: Go to Setup

Step 3: Adjust the Date of Activity if needed

Step 4: Bring in the Design Studio Emails Filter



Step 5: Click on Report to View Results

If there are no results or not what you expected, try pressing the green `Refresh` icon at the bottom.

Smart Lists

Smart Lists are easy tools for counts on leads that meet certain criteria. Be careful that you use the right criteria and understand Smart Lists and the Email Report do not match 100%.

Step 1: Create a Smart List

Step 2: Filters

You can use any of these filters, along with others, to show a count depending on the metric. This is slower than the Email Performance Report if you want to see the entire table of data.

Filter 1: `Member of Smart Campaign IN "X"`

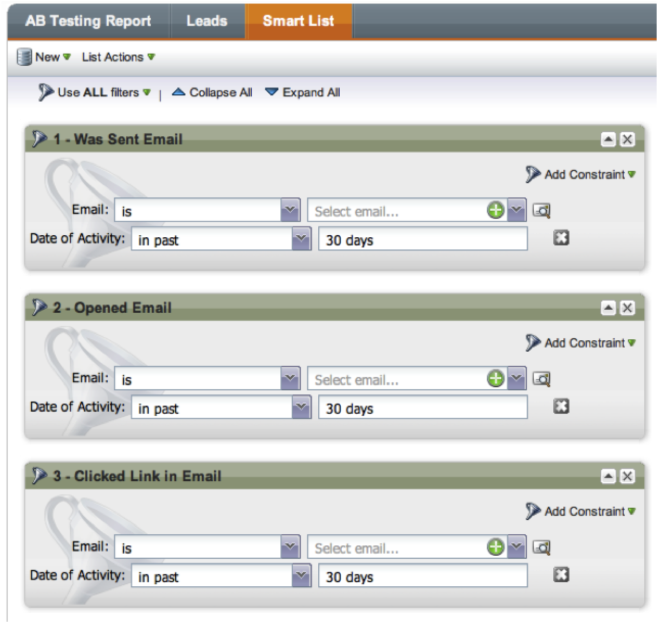
Filter 2: `Was Sent Email: Email IS "X, Y, Z"`

Then you can choose any of the other email filters:

`Opened Email IS "X"`

`Clicked Link in Email: Email IS "X": Link IS "http://company.aboutme.com/link"`

`Unsubscribed from Email: Email IS "X"`



If you name your emails consistently, you can also use `CONTAINS` to collect all emails, which contain `"webinar"` for instance.

Email AB Testing FAQ

Why does my Smart List count of Was Sent Email differ from the Email Performance Report?

The Email Performance Report has its own logic that Marketo has defined in a certain way. This logic means one of the metrics in the report would count an event (Unsubscribed), which does not have a corresponding Log Item. Marketo says this causes discrepancies between smart list email filters and the Email Performance Report.

The logic has the Four Rules of Email Performance:

Rule 1: One Activity Only	Each email activity record is set to one of the following: Delivered, Hard Bounced, Soft Bounced, or Pending.
Rule 2 : Opens	Opened = Delivered
Rule 3: An Action indicates Opened or Delivered	Clicked in Email OR Unsubscribed = Opened = Delivered
Rule 4: Bounce Priority	If email is Opened, any bounces are ignored. If email is not Opened, Hard Bounced > Soft Bounced or Delivered. Thus, the record will show Hard Bounced.

How do I know I am making the right decision?

Ensuring your statistics are valid, that is, statistically significant, is an important part of definitely saying one email is better than another. If they are not, then you should keep the original page and test a new component.

Often you will not need to conduct such a test, because it will be clear which Email did better. If you are sending out so many emails that a .1% difference in Opens will be a big deal, then yes, conduct statistical tests. For more detail, read Avinash Kaushik's Statistical Significance article and then use the included calculator, or use HubSpot's quick calculator.

Chapter Review

Self-Quiz

You should always test at least three changes in every email set. True or False?

___

What is the Null Hypothesis?

___

How does the Flow action Random Sample differ from the Filter Random Sample?

___

___

Recommended Resources

Marketo Documentation

Using Random Sample

Marketo Master's AB Test Slides (2010)

Using Wait Steps

Creating an Email Basics

Building Test Lists with Random and Static Lists

[Marketo Guide to Great Emails](2010)

Email Marketing Glossary

Sending Email Tutorials and Instruction

Forward to a Friend Link {{system.forwardToFriendLink}}

Testing with the Stars – Great examples from the 2012 Summit.

Marketo Community

Complex AB Testing and Wait Step Flow Discussion [Featuring Champion Michael Loop!]

Comparing Weekdays and Weekends [by Champion Eric Hollebone]

Editing a Used Email Template

Sending email to one address even if they have multiple records

Send email to different groups without segmentation

Send email during office hours only - use Wait Must End on M-F at X time.

"Auto" Send the Winning Test to a Smart List

Setting Up Random Sample Lists and Winning Smart Campaigns

Tools

Calculator Spreadsheet for Statistical Significance [Avinash Kaushik]

AB Testing FAQ - includes a calculator! [HubSpot]

HubSpot's AB Testing Intro [HubSpot]

Increase Conversions Cheat Sheet [Mixergy]

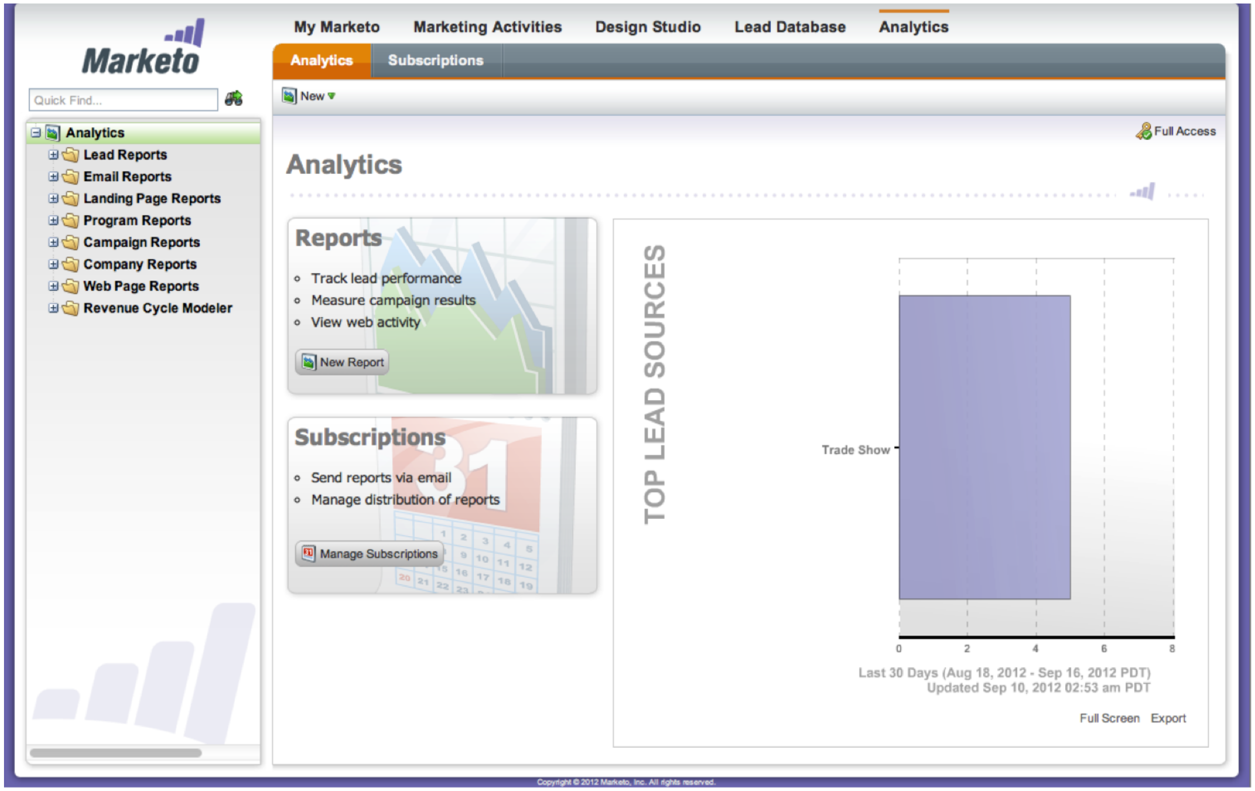
Whichtestwon.com – Case Studies – Tools Guide [WhichTestWon]

Sirius Decisions' Email Quality and AB Testing – about the number of inquiries related to target audience.

Chapter 21. Using Analytics and Reports

At a Glance

Overview



Marketo provides detailed statistics on Leads and their activities on Marketo Pages, Emails, and your website. Marketo Reports are good for understanding how your campaigns and assets are performing, including which activities are leading to Opportunities and Revenue. Reports include:

- **Lead Reports** for understanding origins and progression.
- **Email Reports** for understanding opens, CTRs, and deliverability.
- **Campaign Reports** to watch campaign performance (membership) of any type.

- **Company Reports** detailing web activity based from a company, based on IP lookup.
- **Web Page Reports** analyzing lead activity on the main website.
- **Landing Page Reports** analyzing Marketo Landing Page performance and Leads.
- **Program Reports** analyzing Program progression data.
- **Social Influence Report** which will show you who is sharing your content and bringing in new friends.

Analytics is a critical tool in your marketing life. Marketo helps you view your data better, if you carefully setup your Marketing Activities, Campaigns, Programs, Emails, and Landing Pages. If you followed earlier advice on Naming and Organization, you will find it much easier to build reports in Analytics.

We will touch on Revenue Cycle Modeler and refer to Revenue Cycle Analytics; however, these features are covered in depth in another chapter.

This chapter follows the following format

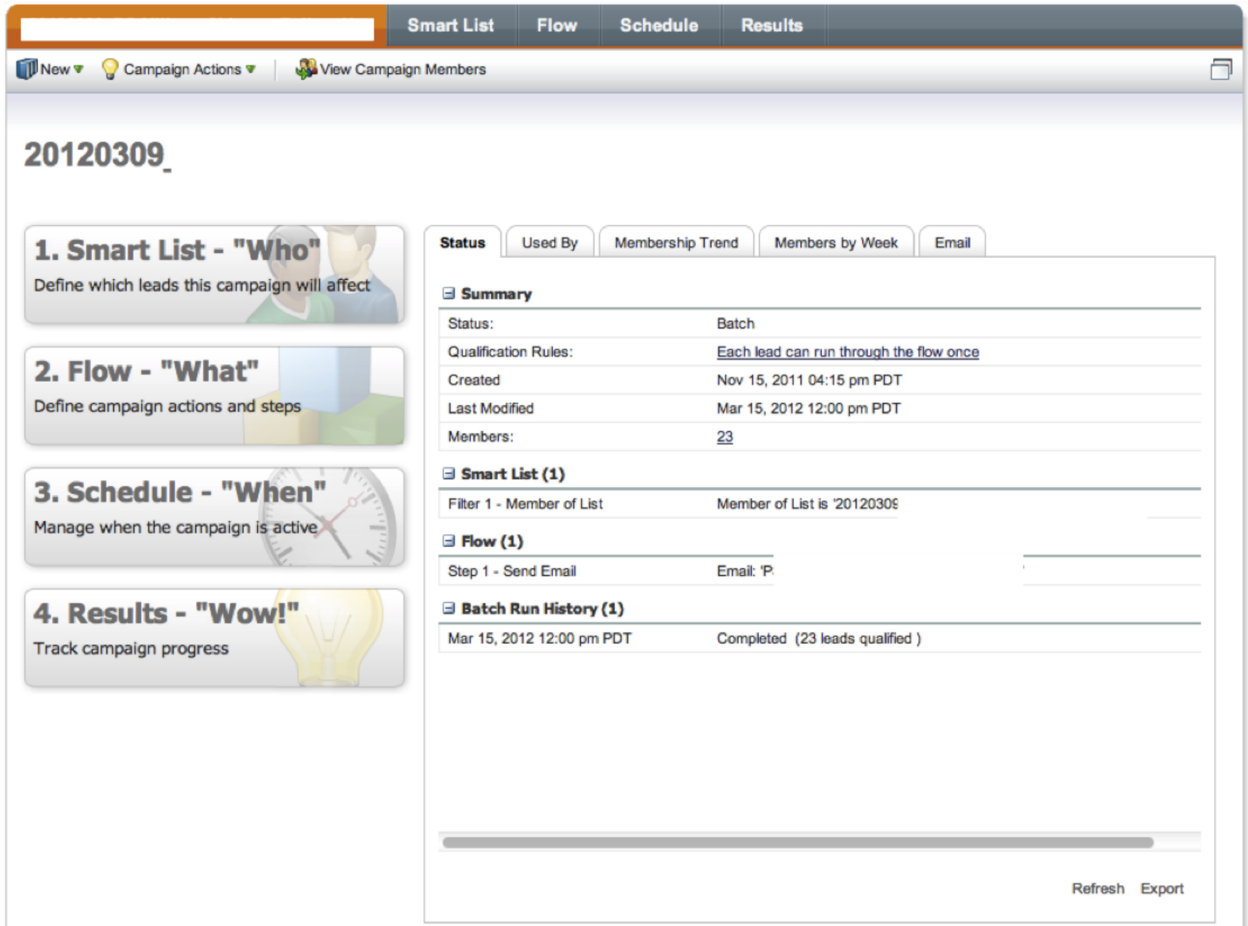
1. Basic Concepts including organizing your Analytics.
2. Report Types and Setup Features is a review of the report types.
3. Customizing Reports with common scenarios to help you understand what is possible.
4. Reporting and Your Business where we discuss building a reporting system.
5. Recommended Resources for further reading

Fast Alternatives for Spot Checking Data

Marketo offers several ways to collect data on your marketing programs. The Analytics tools are the best ways to aggregate data from *across* the system. If you want a fast way to spot check data, then here are other options:

Campaign Overview Tabs

Select any campaign and the overview tab will offer basic data on the leads that qualified for this campaign.



Status

For nurturing campaigns, this screen also shows Leads in Wait Step.

Used by

Lists any other campaigns dependent on this campaign.

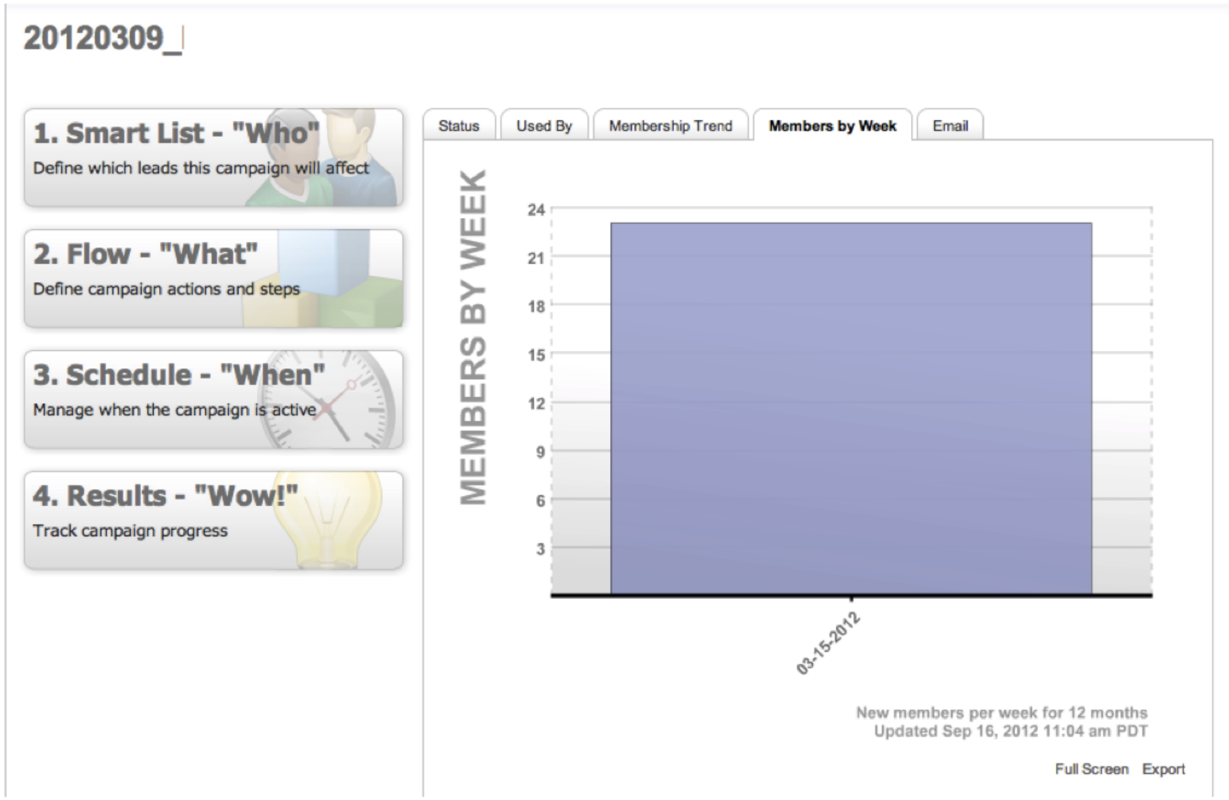
Membership Trend

Leads who qualified over time. This is a rolling chart.

Members by Week

Chart of members by week. No data displayed for weeks without members. This is a rolling chart.

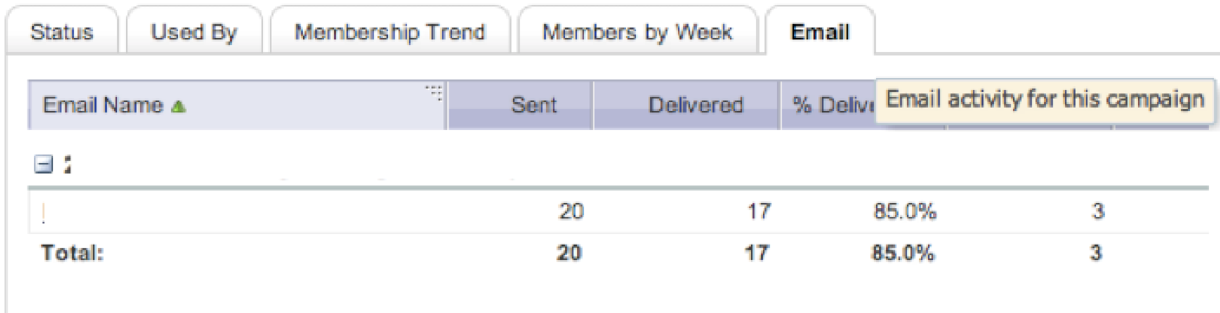
Note: you can hover over any chart element to see the actual count.



Email Performance

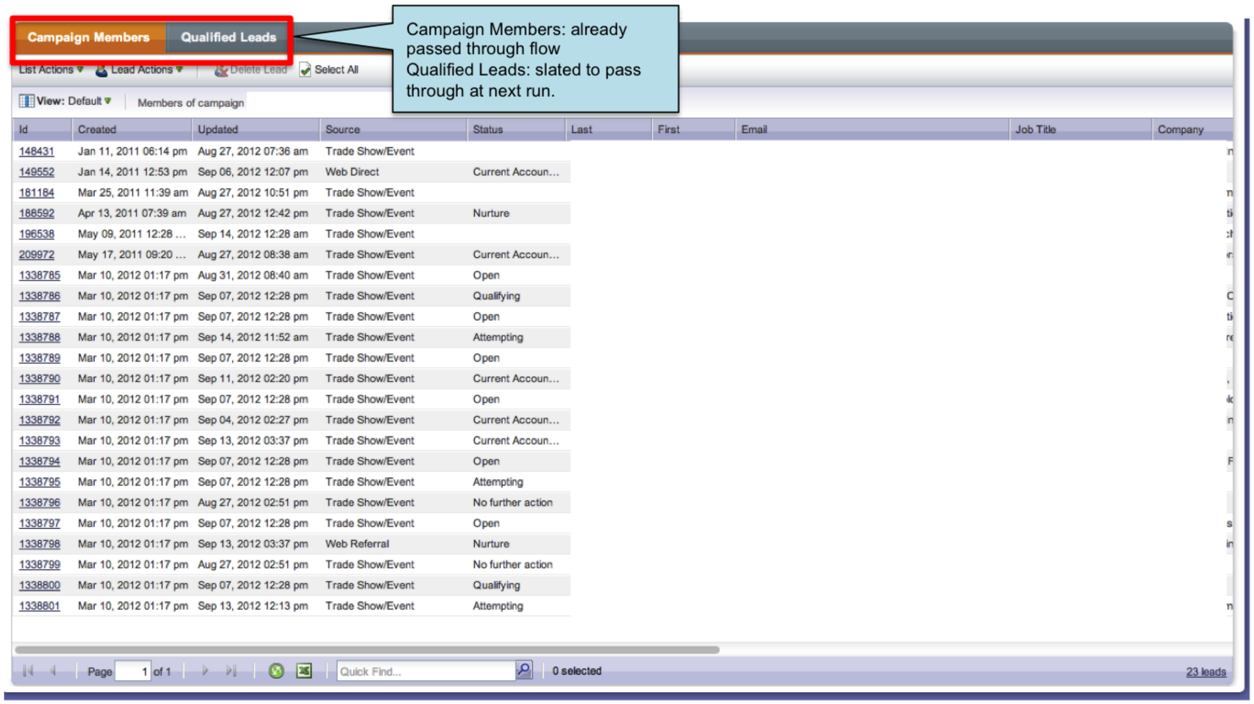
Note: Remember that running the same campaign multiple times with a single email will distort this data.

An Email Performance report for any emails sent by this campaign. This is the same data that appears in the Analytics Email Performance Report.



Campaign Member Lists

Each Campaign also provides a list of every lead who ever qualified for the flow. You can click on this list to see the complete list of leads. Use the View changer to adjust the columns shown.

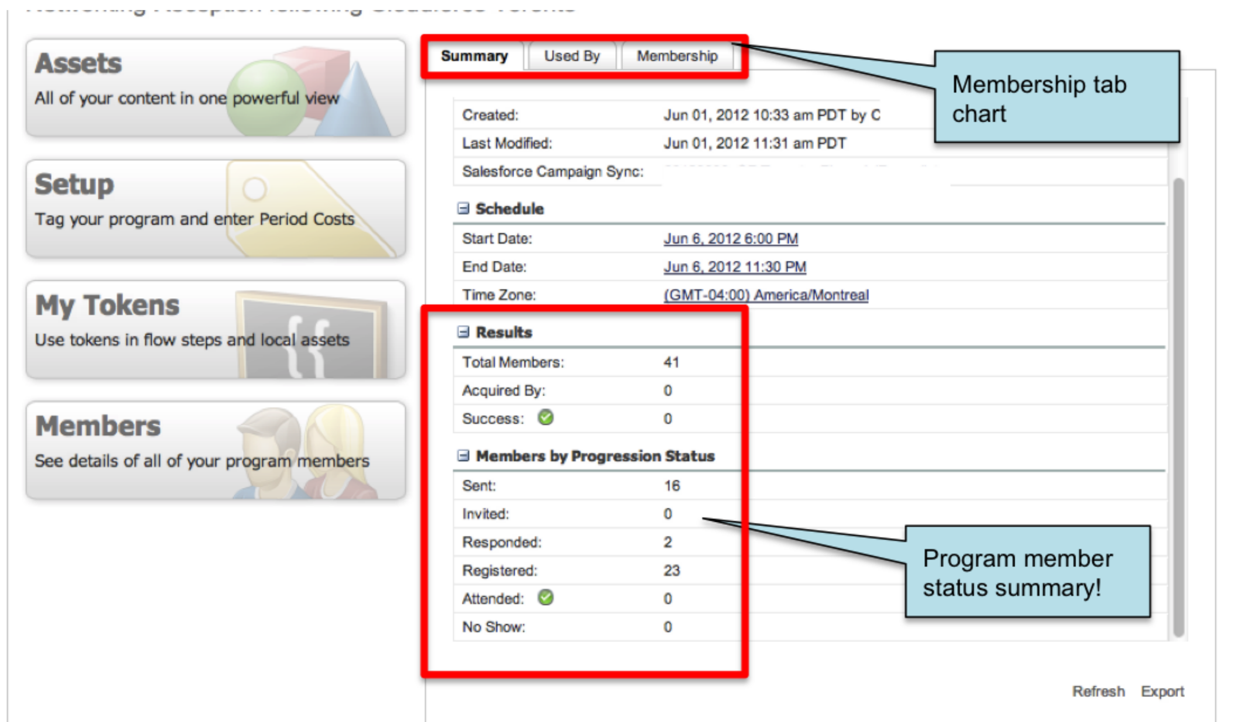


Program Overview Tab

Programs contain a wealth of data for individual marketing campaigns. If you are concerned with a particular Program, just click on it!

Summary

Summary and settings for the Program. This is similar to the Campaign Overview. Programs, however, show Membership Statuses and success metrics as well.

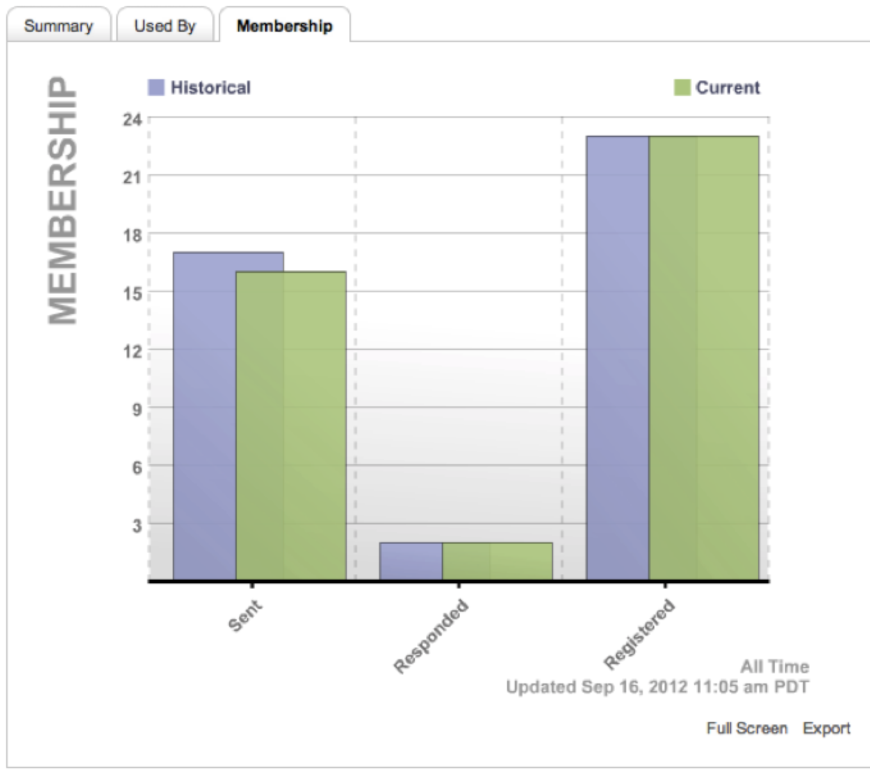


Used By

Shows campaigns or other programs dependent on this Program.

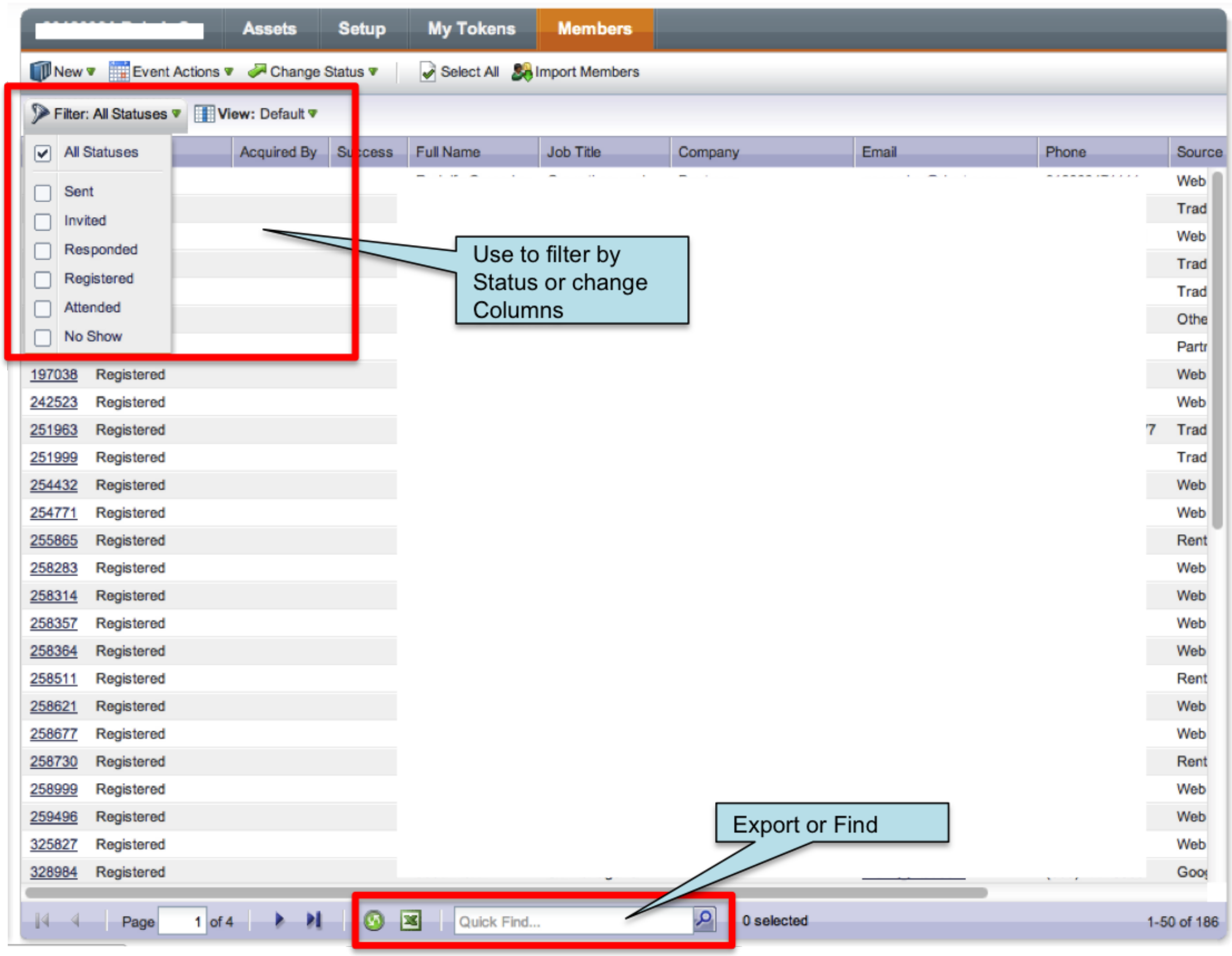
Membership

Displays a chart of current Membership statuses. Current means currently in the Program with that Status, while Historical shows how leads have moved through the Program. Sent or Registered Leads likely move on to a new Status, so this chart will show the original count and the current count.



Program Members Tab

Similar to Campaign Members, this tab shows anyone who is currently a Member of the Program. You can use the Status filter or Lead View to review the leads.



Smart Lists

Note: Smart List summaries often reset their Lead Counts, so you need to re-run them each time to refresh the dynamic data.

Using a smart list for a data count is a quick way to find out data for a specific purpose. For instance, if you had a cross-tab of those who Unsubscribed and Was Sent Email X but not Customers, this is a good place to start.

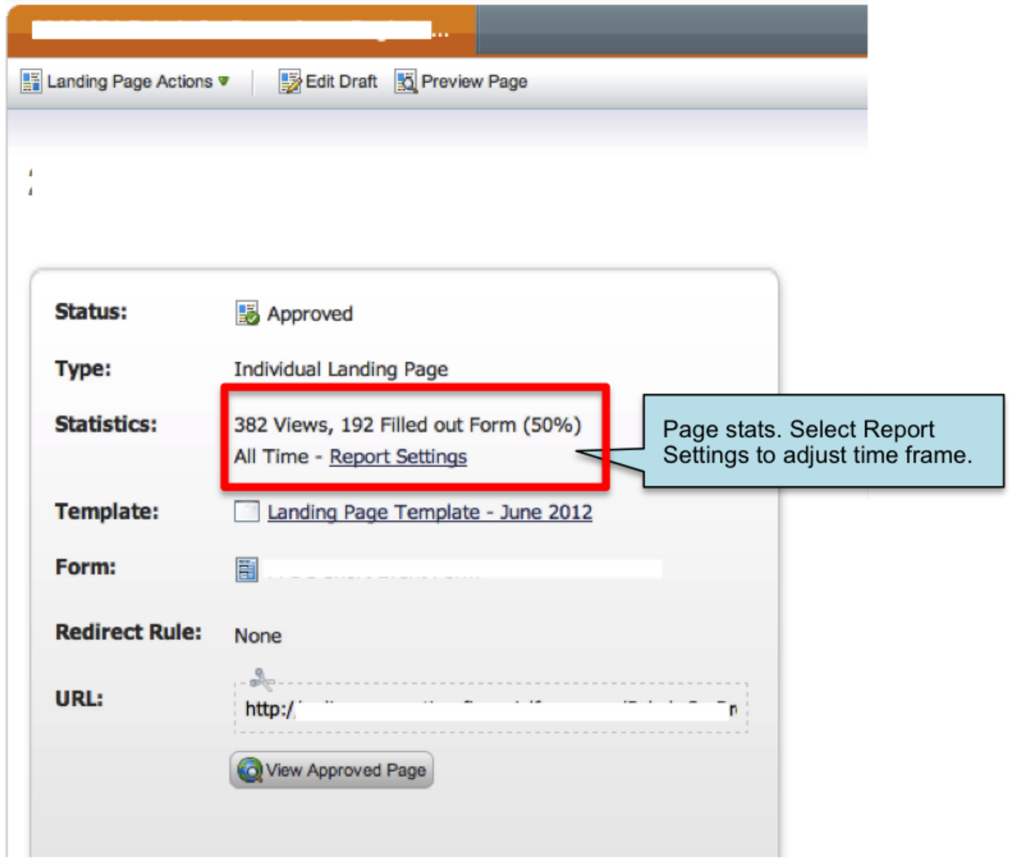
Static Lists

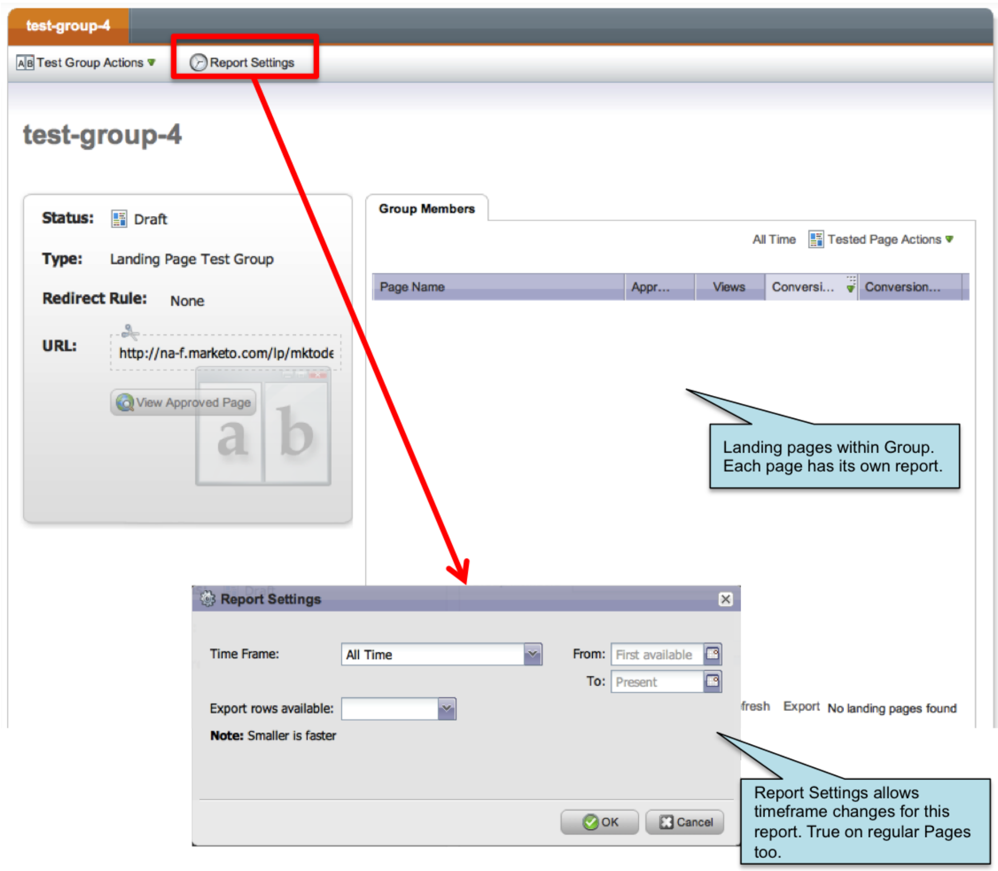
Caution: Email Filters in Smart List may show different counts than Email Reports. See below for more detail.

Some data may be collated or placed into a regular list where a fast count can be made. If you are using automatic list management to build faster loading House Lists, this is where you would find out the current count.

Landing Page Overview Tab

Each landing page and AB Test Group provides statistics on Page Views and Conversions for each page. This is true for Design Studio and Program based pages.





Building Your Reporting System

Marketo and other marketing services firms suggest a variety of methods and metrics to use, as you become a Revenue Performance Marketer.

Common Metrics

According to a 2011 Lenskold Group Study, 48% or more of Highly Effective Marketers use the following metrics in their reporting:

- Percent of Revenue Contributed by Marketing
- Opportunity Revenue
- Avg. Revenue per Won Opportunity

Successful marketers also calculate ROI metrics such as ROMI, NPV, or profitability per channel. The same survey indicated nearly 80% of marketers were tracking

- Lead Quality
- AB Testing
- Lead Funnel Metrics
- Campaign and Channel Performance
- Lead Handoff Process (MQL->SAL)

Developing a marketing reporting system takes time and thought. I recommend using Marketo to update existing reports while working on a set of reports that better match the lead funnel. Marketo's Definitive Guide to Marketing Metrics is an excellent course in how to do this. Stay tuned for an in depth course on using this Guide with Marketo.

For establishing targets, Lenskold's Lead Gen Calculator is a solid bet if you do not already have a good system.

Translating Marketo's suggestions into Marketo reality. So how do you setup your systems to get closer to what Marketo does?

What Works for Your Business?

Step 1: Establish Goals

Step 2: Design Programs to be Measurable

Using Marketo and your CRM means you are halfway there.

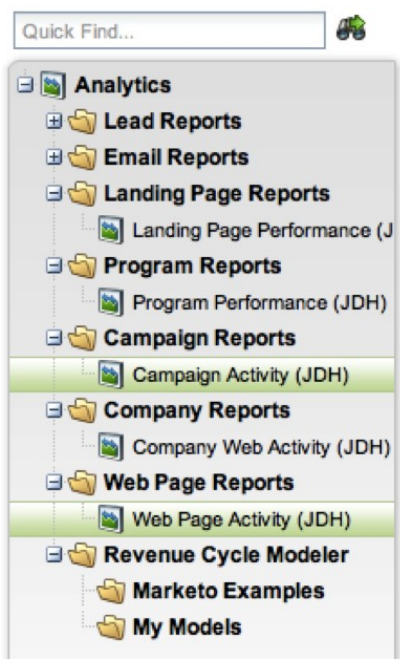
Step 3: Focus on Decisions Which Improve Marketing

You do not have to measure everything. Measure the activities that matter to your business.

Getting Started with Analytics

Marketo Analytics can be an easy to use tool for collating data for your next Board Report. Or it can be a hybrid, where you use Salesforce Reports or a third party data tool. Please follow these concepts and suggestions carefully as they will save you time and money.

Note: even with a third party reporting tool, Marketo's Email and Landing Page reports will be very helpful.



Organization & Naming

Note: naming and organization will make reporting go much faster.

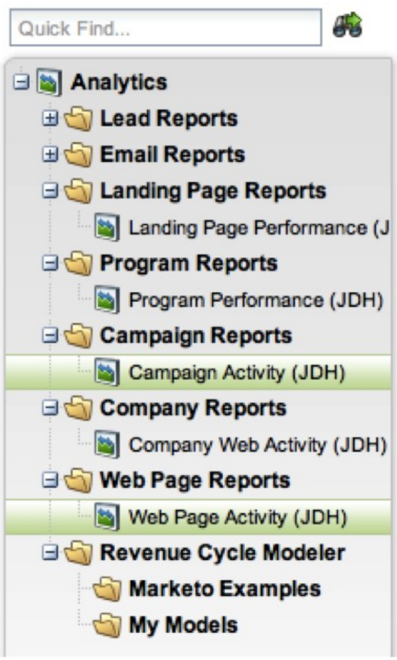
It is important to maintain consistency in your use of Naming of assets, Programs, Lists and Campaigns to assist you in reporting. For RCA subscribers, you will find it much easier to maintain accuracy with the consistent use of Program Setup details as well as a consistent naming scheme. I see many questions about RCA and RCM data that ultimately go back to the original campaign setup.

Folder Structure

Marketo does not allow much flexibility here. You can create new folders, but only under each existing folder. Reports of the same Type should stay together. For instance, create new Lead Reports under the Lead Report folder.

I strongly recommend creating a folder for each team member in each Report Type Folder. This will keep people from adjusting important reports by accident.

Please create a new folder with your name under the appropriate folder to organize the reports.



*The current Workspace denoted by `(JDH)`.

Naming Convention

Use the following naming convention for new and cloned reports:

`Descriptive Name - Region - Time Frame`

Good examples:

`Web leads by Webinar Campaign – US – Past 6 Months`

`Email Performance by Webinars – Global – Past 90 days`

Bad examples:

`Nurture`

`Capterra`

`PDF Downloads`

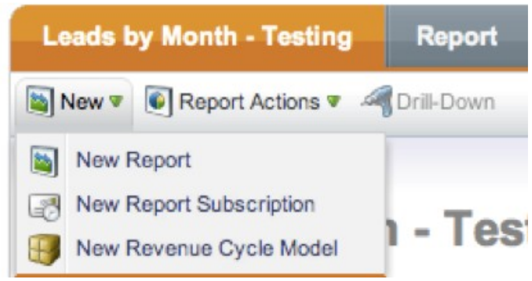
`May2012`

Creating New and Cloning Reports

When creating a new report, it is usually best to clone an existing report that is similar to your desired report subject. For instance, clone the report Leads by Source if you want to report on `Leads by Source Type Over Past 6 Months`.

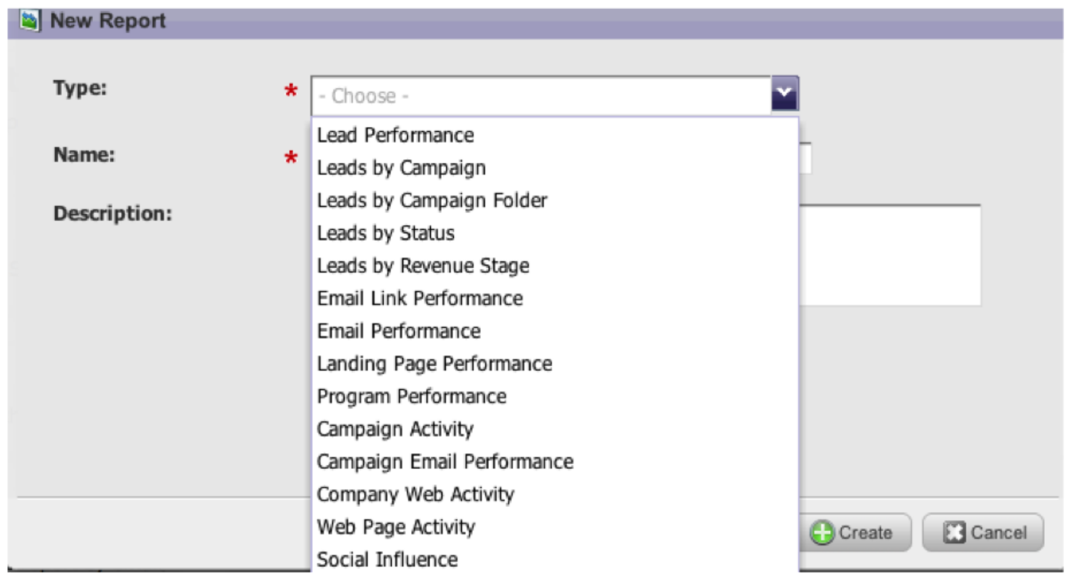
Please do not change or delete the System default reports, which exist under the main report folders. Usually these have generic names such as Campaign Activity or Leads by Campaign. If you modify these reports, you will lose their original settings.

New Reports: Use the New Menu underneath the current report name to create a new report.



When you create a new report, Marketo will ask you to select from among 14 pre-set reports. Keep in mind that Lead Performance reports can be modified to help with many of your funnel needs.

Note: Social Influence Report shows data only if you use Social Sharing on Landing Pages.



View a Report Right Now

Viewing an existing report is easy!

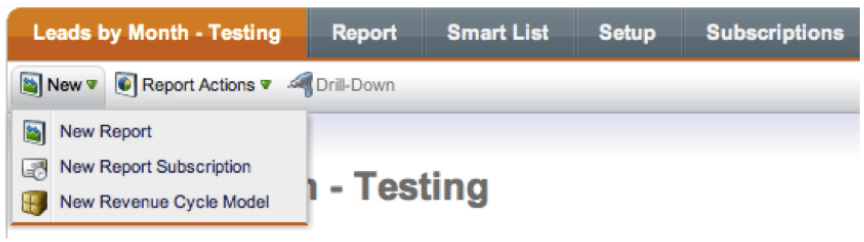
Step 1: Click on Analytics

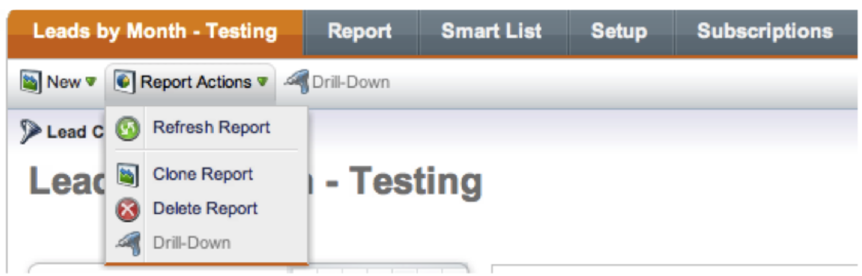
Step 2: Search for and click on the report you want to review.

Step 3: To see the underlying data, click on the Report tab next to the Report's name.

Report Components

When you first select a report or the Analytics root, you will usually see the Report tab and menus.

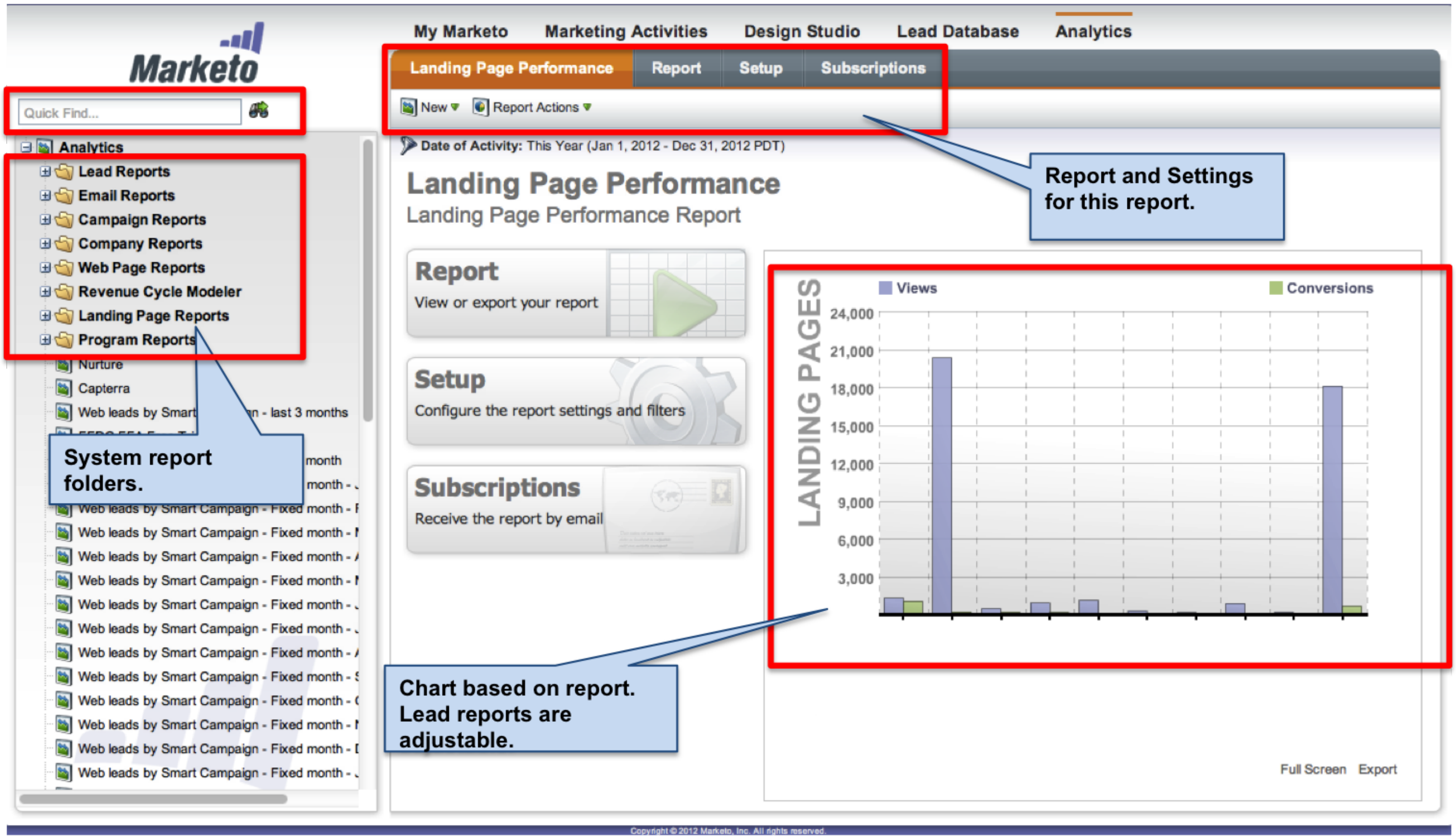




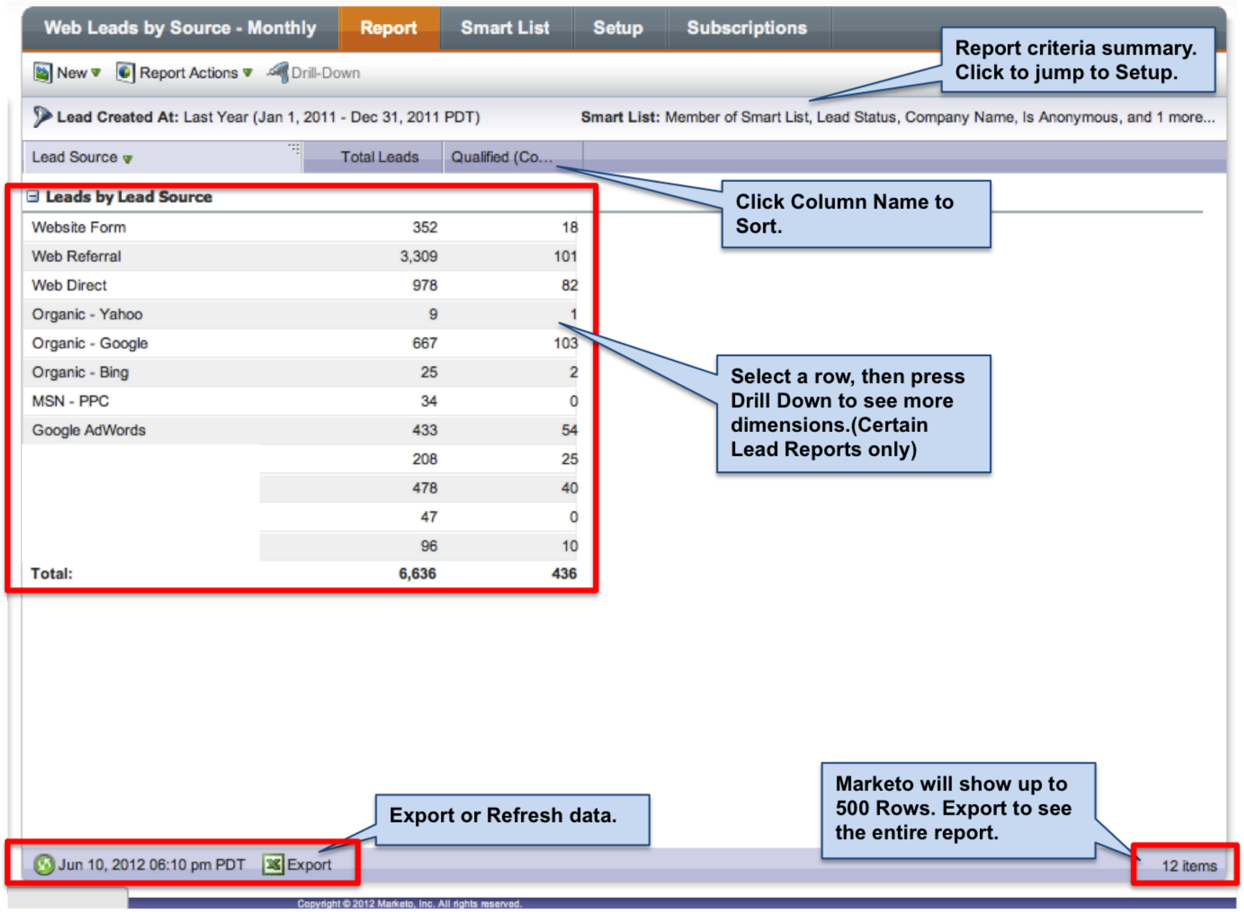
Each report has 3 to 4 tabs that control the data the report displays to you. Not all Report Types permit the same functions. Let's review the Report Types and how each one works.

When you first click on Analytics, you will see a screen similar to this one. The menus and tabs allow you to control reporting functions. The search box is the same as on other Marketo sections if you want to search for a report.

Each report displays a summary chart, which can also be changed if desired.



If you click on the `Report Tab`, the full table appears.



Report Types and Setup

Warning: Changes to reports are live and cannot be undone easily. Clone reports before modifying.

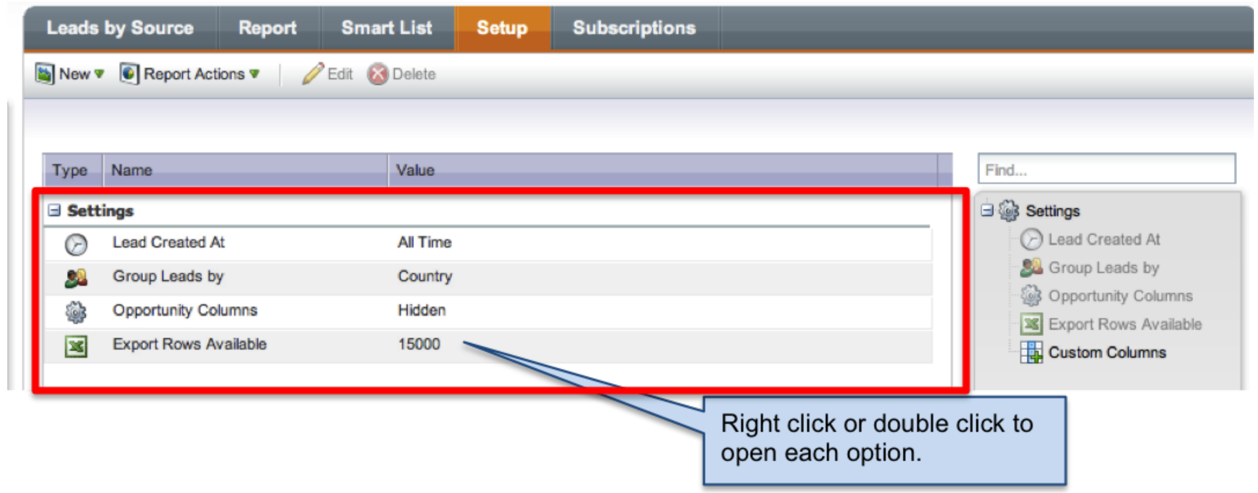
Marketo has fourteen types of reports that are entirely separate in function and use. The best practice is to clone an existing System Report and then modify it to your needs. You should also consider creating a standard report for your needs and then cloning that report to watch specific campaigns, time frames, or other things.

You may rename any report by right clicking on it or double clicking on its name on the `Report Overview`.

Report settings are different depending on the type of report you are using.

Setup – Control the Main Report

Setup options vary by report type. The Setup options are the main criteria used to pull in data.



You can remove options as desired. A table of options and report types is also available below.

Setup Option	Default Choices	Available On	When to Use
Time Frame	Leads: Created At Email: activity on the email Campaign: executed in time frame Web Page: leads that visited in time frame.	All	Restrict report overall data by time. (Recommended to choose specific time frame for speed).
Group By	Lead Attributes (e.g.: Lead Source, Company Type)	Lead Reports (not Leads by campaign)	Which field do you want to total in the Rows? Group by and Drill Down are your best cross-tab options.

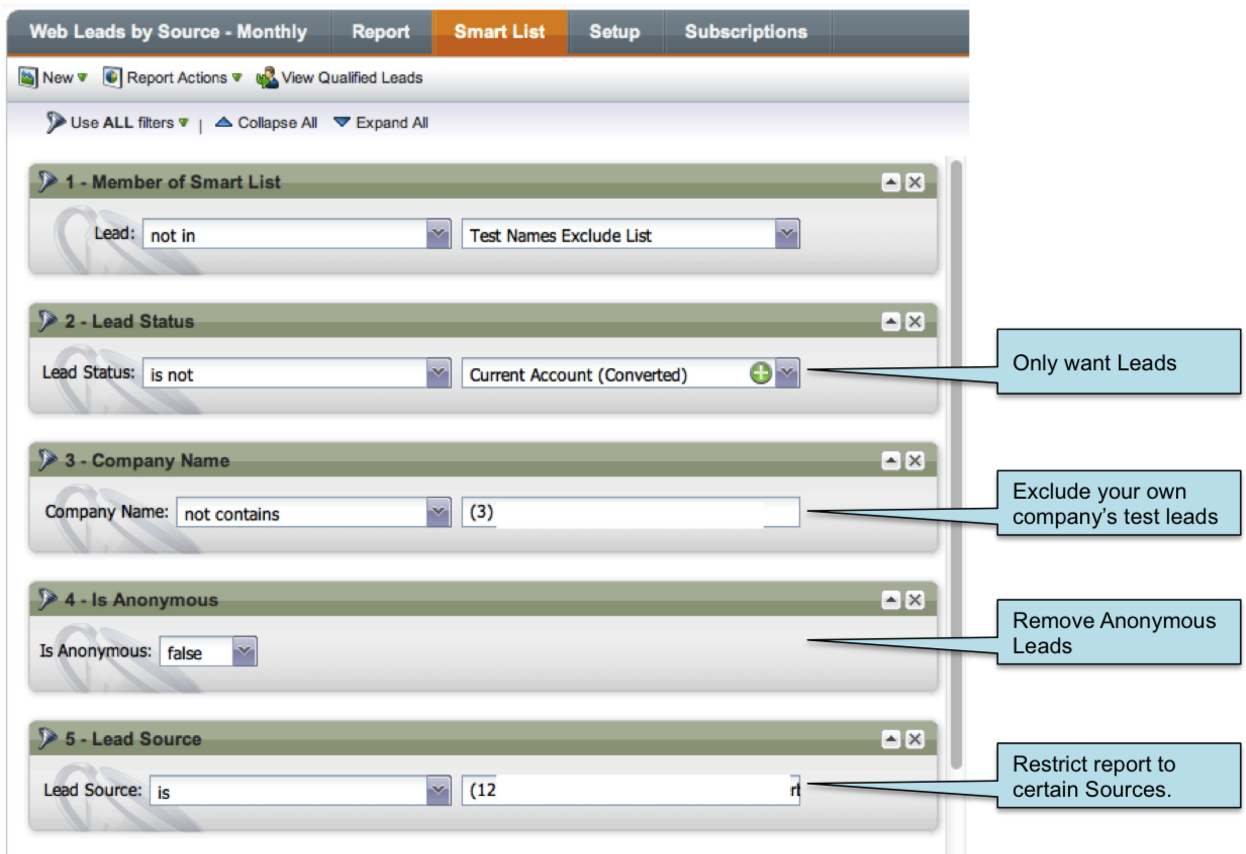
Setup Option	Default Choices	Available On	When to Use
Opportunity Columns	Shown Hidden [default]	Lead Reports	Shown will show all Opp columns giving you a view into the Revenue pipeline associated with the Leads, Campaigns, Pages, etc. that you are reporting on.
Export Rows Available	5,000 [default] 30,000 [max]	All	How many rows you can export to an XLS sheet. The Report view is limited to 500 rows.
Custom Columns	[Choose an existing Smart List]	Leads (not Leads by Status)	This will create a new column on the Report based on the Smart List(s) you choose. Please create these ahead of time.
Filters:	Campaigns: choose folder(s) or specific campaigns Emails: choose emails by Folder or Campaign Pages: choose emails by Folder or Campaign	Campaigns Emails Pages only	You can restrict the report to specific folders or assets. You can also select all using the tree.

Smart List Criteria – Control What is Reported On

The Smart List tab allows you to further constrain the data pulled into the report. Smart List use is considered exclusionary because you are asking Marketo to report only on the leads selected for any type of report.

You should exclude certain lists or criteria as a standard:

- Test Names (database test records should be excluded)
- Is Anonymous is True (you will often want to exclude these from non Web Activity reports)
- Leads with blank data (Often appears on Web Activity, possible spam leads)



In the above example, we removed test leads as well as constrained the data to certain Lead Sources. You could use Filters or other Lists to select the Leads to include on this report.

Note: Smart List criteria are not available on Landing Page Reports or Program Reports.

Deliver Reports to Your Team – Automatically

You can also setup a subscription to any report in Marketo Analytics. Tell Marketo to send you, your manager, or entire teams of people the latest data every week. Here are some fun use cases to let the computer do you work for you:

- Email Performance and Reputation Monitoring
- Web Activity by Salesperson/Territory
- Program Performance by Month
- Webinar Performance by Month
- Landing Page Performance Customers by Week

Step 1: Create New Report Subscription

While in the report, click on the Subscriptions tab, and then press Add New Subscriptions. You can also do this from the main Analytics screen using the New Menu.

Step 2: Go to Setup

Step 3: Enter the email address(es) of the subscriber(s),

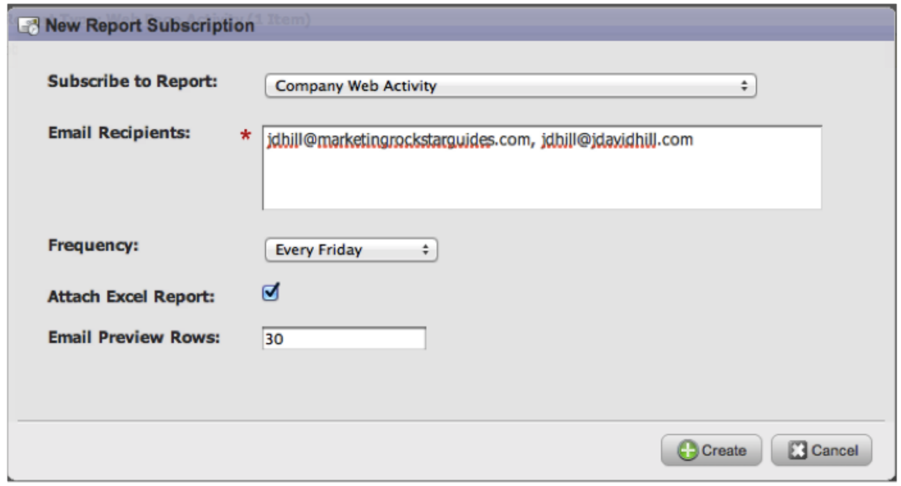
Step 4: Select the timing (daily, weekly, monthly).

Attach Excel Report should be true

Step 5: Email Preview Rows

Have Marketo show the first 30 rows in the email itself so a Subscriber can decide to open the attachment.

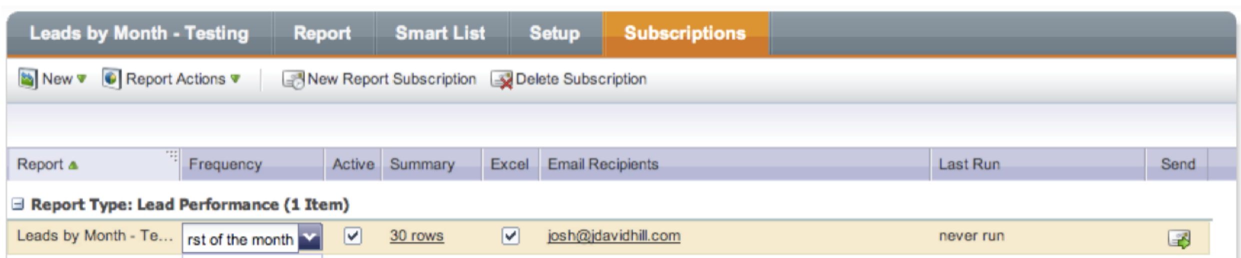
Note: Tokens are not supported for Subscriptions.



Step 6: Press Create

Step 7: View Active Subscriptions

When you are done, Marketo will display the Subscription tab for the Report with a list of current subscriptions. You may add multiple subscriptions for different groups if they requested another report frequency.



Modify an Existing Subscription

If you need to change emails or frequencies, you can do so from the `Analytics>Subscriptions` tab or visit the Report itself.

Step 1: Click on Subscriptions Tab

Step 2: Click on the setting you wish to change

You can then click on Frequency, Active, or Summary to adjust the settings:

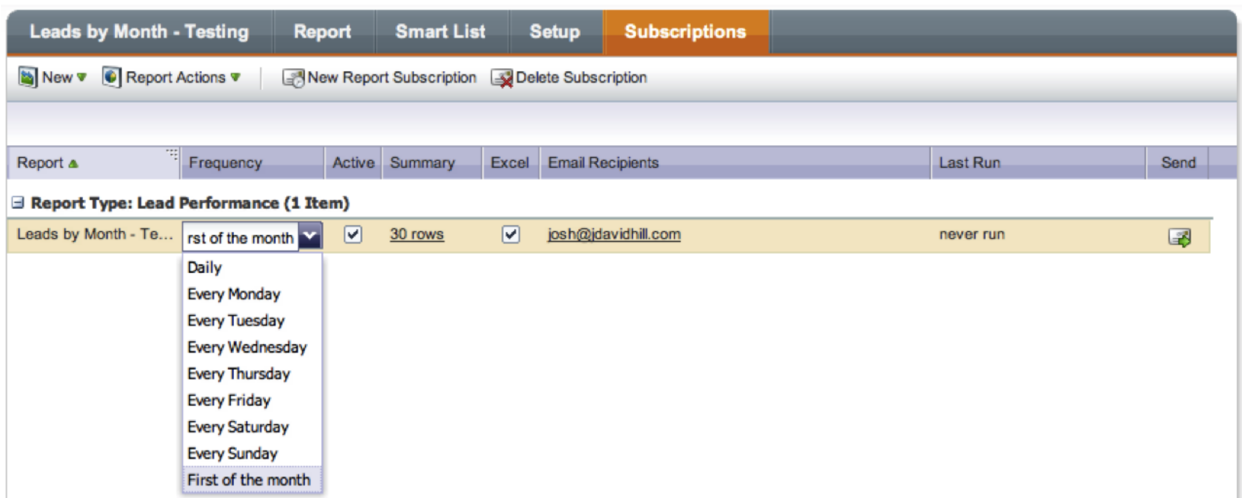
Deactivate: uncheck the Activated box

Delete: select the row in the white space, and then press Delete

Change Frequency: press Frequency link

Change recipients: click on Email Recipients.

Send Now: press the Send Icon



You can also set a subscription to any report in Marketo Analytics using the following steps:

Step 3: Enter the Report

Step 4: Select Subscriptions

Step 5: Add New Subscriptions

Step 6: Enter the email address(es) of the subscriber(s),

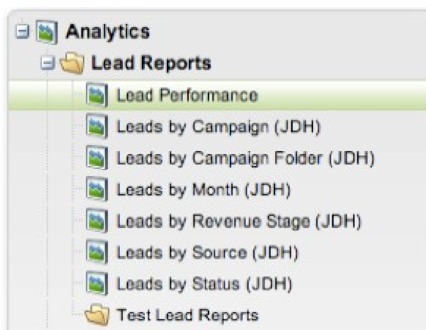
Step 7: Then select the timing (daily, weekly, monthly).

Reporting, Step by Step

In this section, we will review the main report types and how to use them for basic reporting. More interesting options are available in the next section, How to Customize Reports.

Lead Reports

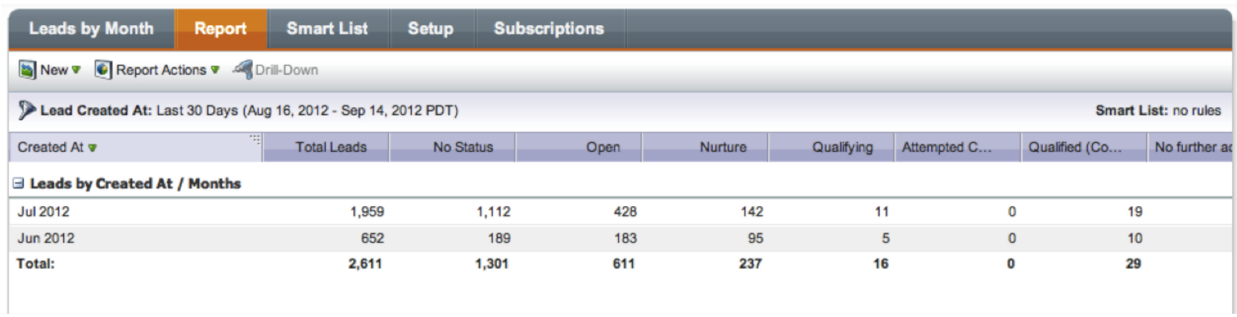
Lead reports are often called [Leads by X Reports] in Marketo documentation. There are two main types of reports with several pre-set default reports: Leads by Campaign and Leads by Source.



Lead Performance Report (Progress)

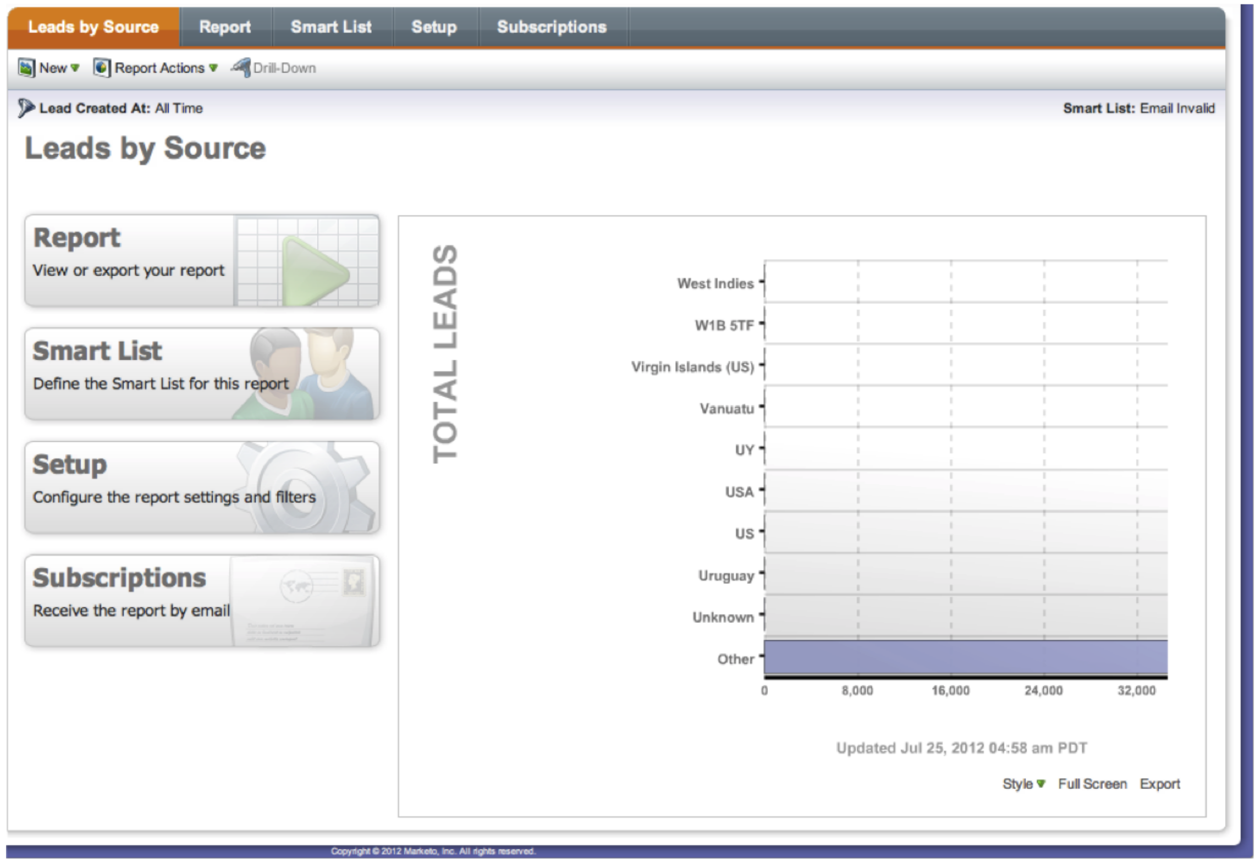
Leads by Month

Groups by month and year of creation.



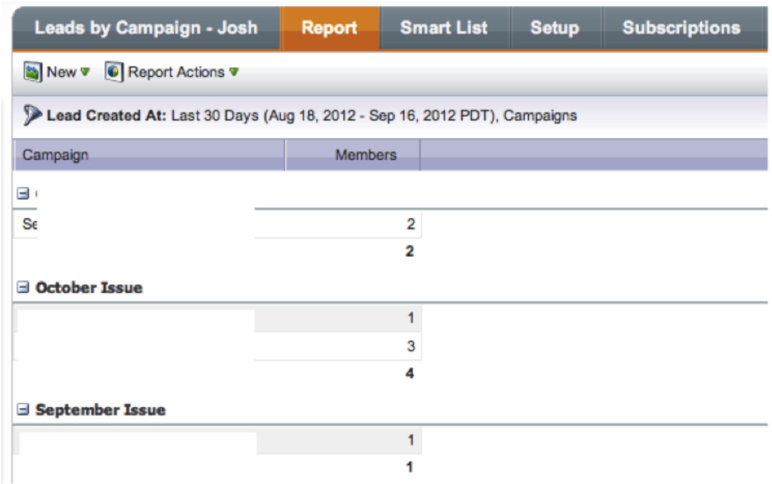
Leads by Source Report

This report shows Leads by Lead Source



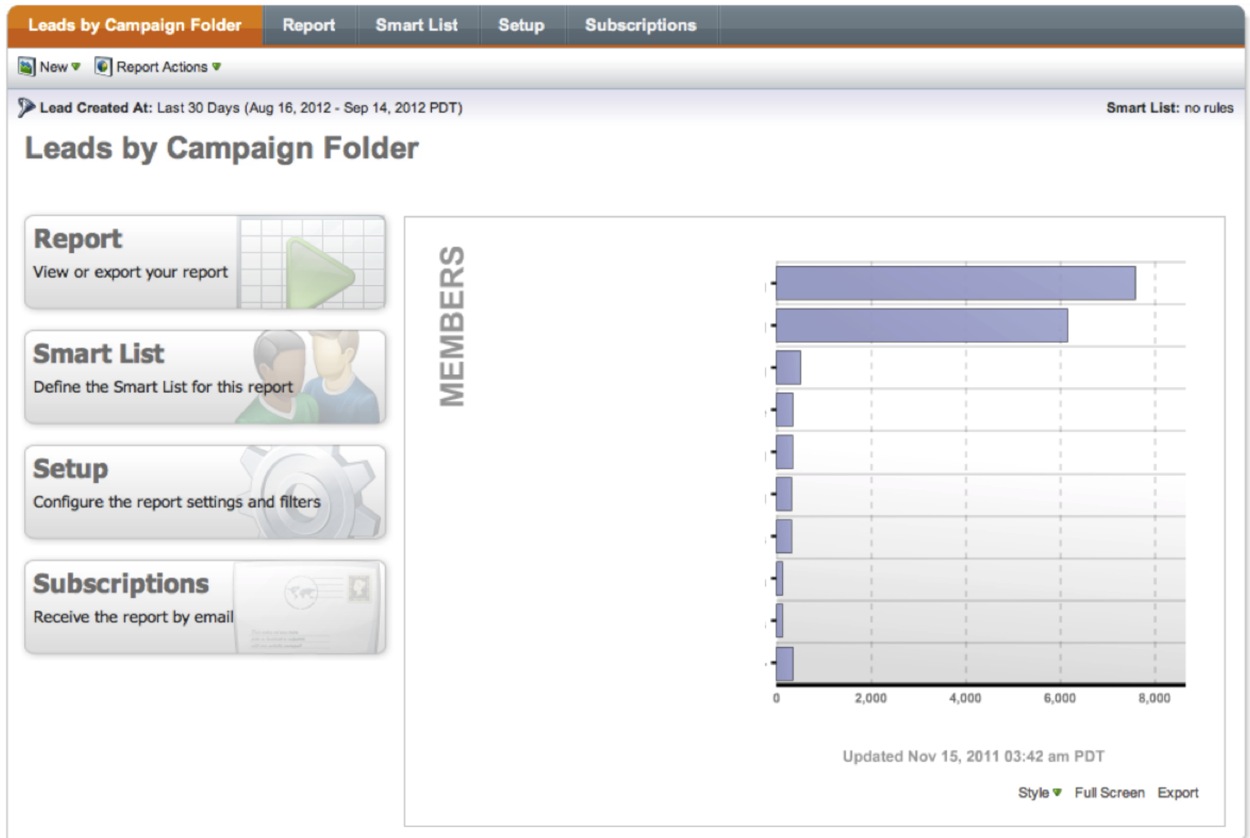
Leads by Campaign

Grouped by smart campaign membership. Leads in multiple campaigns will be counted in each campaign row.



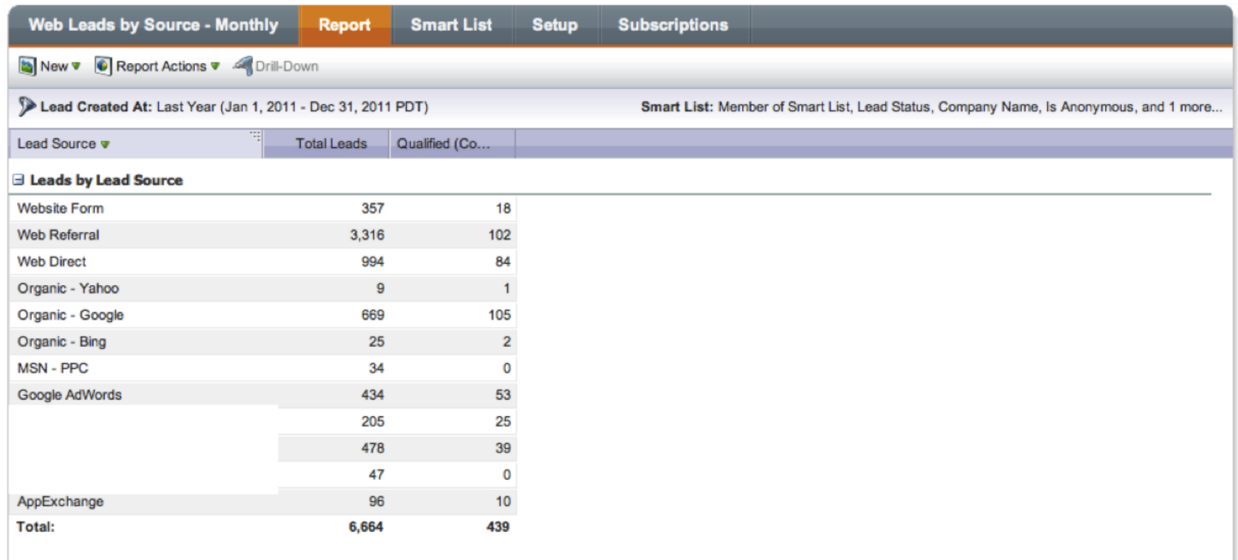
Leads by Campaign Folder

Grouped by the folder in the Marketing Activities tree depending on your selection. Each campaign or program underneath the selection is counted toward the report. Leads in multiple campaigns will be counted in each campaign row.



Leads by Status

Just what it sounds like! The famous Status report is the fast way to view your funnel. The default is a Monthly group. You can adjust to different date groups as well adjust status views.



Lead Source	Total Leads	Qualified (Co...
Leads by Lead Source		
Website Form	357	18
Web Referral	3,316	102
Web Direct	994	84
Organic - Yahoo	9	1
Organic - Google	669	105
Organic - Bing	25	2
MSN - PPC	34	0
Google AdWords	434	53
	205	25
	478	39
	47	0
AppExchange	96	10
Total:	**6,664**	**439**

Leads by Revenue Stage

Displays nothing of value until you populate the `Revenue Stage` using Smart Lists and RCM.

Lead Report Options – Make it your own!

Lead reports can be constrained by

- Date of Activity – from first run
- Export Rows
- Group Leads by
- Smart Lists

Additional options can include

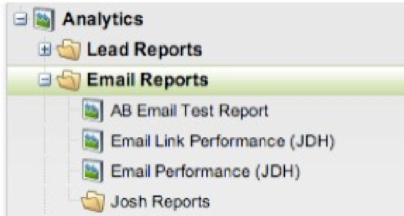
- Adding Opportunity Columns
- Adding a Custom Column to a Lead Report (smart list driven groupings)

Here is a summary of possible Lead Report columns. Lead reports are unique and therefore can have Custom Columns as well as removal of columns.

Column Name in Report	Marketo's Description	What This Means for You
Total Leads	Count of leads in the time period	
No Opty	Leads without an Opp	
Days No Opty	Average age in days of opportunities who are not an opportunity contact	
Has Opty	Has Opp=True	
Has Opty %	Has Opty / Total Leads = %	Key Metric – how many leads this year made it to the Opp? Is your Sales Team moving people? Are your leads qualified?
Days Until Opty	Average Number of days before Lead is Converted to Contact.	May relate to length of nurturing, readiness to buy, or sales team effectiveness.
Total Opty Amt	Sum of Opty Estimates	
Avg Opty Amt		
Total Opty	Total number of opportunities for row based on Primary Contact	
Won	Number of Won Opps	Success!
% Won	Won Opps / Total Opps = %	Low or high? Is that good compared to a baseline?
Days to Close	Average Number of days to Close Opps	Once an Opp is created, does it close quickly? Is Sales waiting until a closing is imminent to create an Opp?
Days in Sales	Average length of total sales cycle in days. Days to Opp + Days to Close	Total sales cycle - use this in your monthly presentation!

Email Reports

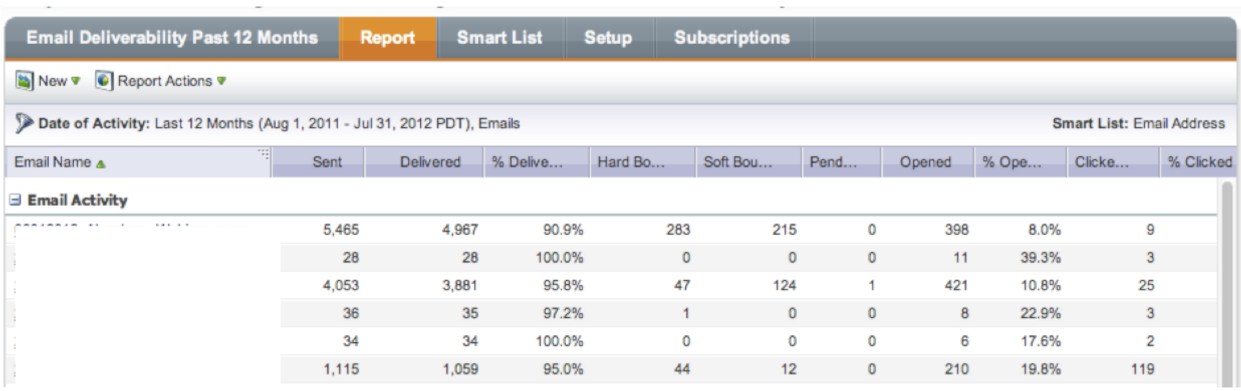
There are two email reports out of the box: Email Performance and Email Link Performance. They are very different reports with very different purposes, so be careful!



Email Performance – Deliverability Data

Note: this is similar to the Smart Campaign Email Tab report.

This report provides useful deliverability statistics that are useful for Managing Reputation as well as understanding how different emails performed. You can also adjust this report to manage AB Email Testing. Email Performance allows constraints by smart list enabling exclusions of test leads or by desired groups, such as Customer Email Performance vs. Prospects.



Email Name	Sent	Delivered	% Delive...	Hard Bo...	Soft Bou...	Pend...	Opened	% Ope...	Clicke...	% Clicked
	5,465	4,967	90.9%	283	215	0	398	8.0%	9	
	28	28	100.0%	0	0	0	11	39.3%	3	
	4,053	3,881	95.8%	47	124	1	421	10.8%	25	
	36	35	97.2%	1	0	0	8	22.9%	3	
	34	34	100.0%	0	0	0	6	17.6%	2	
	1,115	1,059	95.0%	44	12	0	210	19.8%	119	

Email reports can be constrained by

- Date of Activity – from first run
- Export Rows
- Design Studio (Archived and regular)
- Marketing Activities from Programs (Archived and regular)

- Smart Lists

Let's take a deeper look at what the report details. Tons of questions are focused on this one article, which I will explain here. Please take a look at the Managing Your Email Reputation chapter on how to use this report to improve lead quality.

The `Date of Activity` refers to the first time the email was sent. It is possible to have sent an email 1 year ago and still have activity on it, although very unlikely.

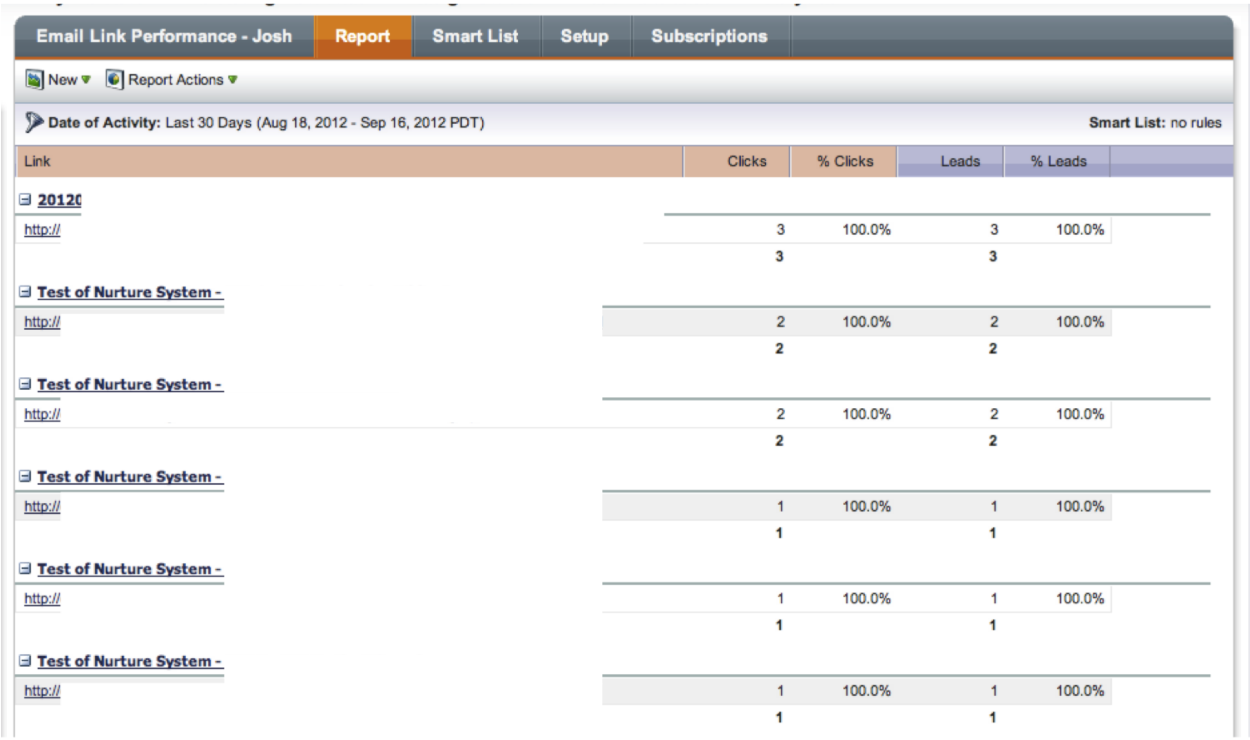
Column Name in Report	Marketo's Description	What This Means for You
Email Name	Name of the Email	Click on it to see the original
Sent	Leads with at least one attempted delivery.	This will match the Number of Leads Who Qualified for the Campaign Less Blocked Leads.
Delivered	Leads who had a successful delivery	You can use the trigger Email Delivered.
% Delivered	Delivered / Sent = %	A key metric for Managing Your Reputation. Watch this carefully over time.
Hard Bounced	Number of leads with messages, which were permanently rejected.	Your goal is to reduce this number through better segmentation, pruning of old leads, etc.
Soft Bounced	Number of leads with messages temporarily rejected.	Usually indicates Out of Office or heavy traffic problems.
Pending	Messages still being sent or retried	This is usually 0 after 1 day. Check with support if this number is still great than 0 after 72 hours.
Opened	Leads who opened the email at least once.	This is only an approximation because Opens are tracked using a clear GIF in the email. Email clients such as Gmail, Outlook, and Apple Mail often block images.
%Opened	Opened / Delivered = %	This is also a key metric of email quality, especially Subject Lines.
Clicked Link	Leads who clicked at least one link in the email.	This can be any link, including unsubscribed. In your lists or other reports, you may want to exclude Leads who unsubscribed or clicked the Unsubscribe link.
% Clicked Link	Clicked Link / Delivered = %	

Column Name in Report	Marketo’s Description	What This Means for You
Clicked to Opened	Clicked Link / Opened = %	Of those who opened the email, how many continued to click? This is a key metric for conversions and your inbound funnel from Email to Click to Page to Filled Out Form.
Unsubscribed	Unsubscribed Leads count	This is the absolute count of leads that unsubscribed from this email.
% Unsubscribed	Unsubscribed / Delivered	Key Reputation Metric: if greater than .20% of those who were delivered this email unsubscribe, then you need to adjust segmentation or prune your list of deadweight.
First Activity (Time Zone)	First time email was sent	
Last Activity (Time Zone)	Most recent (last time) email was sent	It is possible to re-use emails in a variety of ways, autoresponders are the emails most likely to matter with this metric.

Email Link Performance

This report shows the links clicked in a particular email. **Links not clicked on will not appear here**. The links here will also appear in the `Clicks Link in Email` smart list filter. You can use this to help understand how your copy, layout, CTAs, anchor text are impacting your goals. It is possible to build a rough heat map of how people interact at your emails.

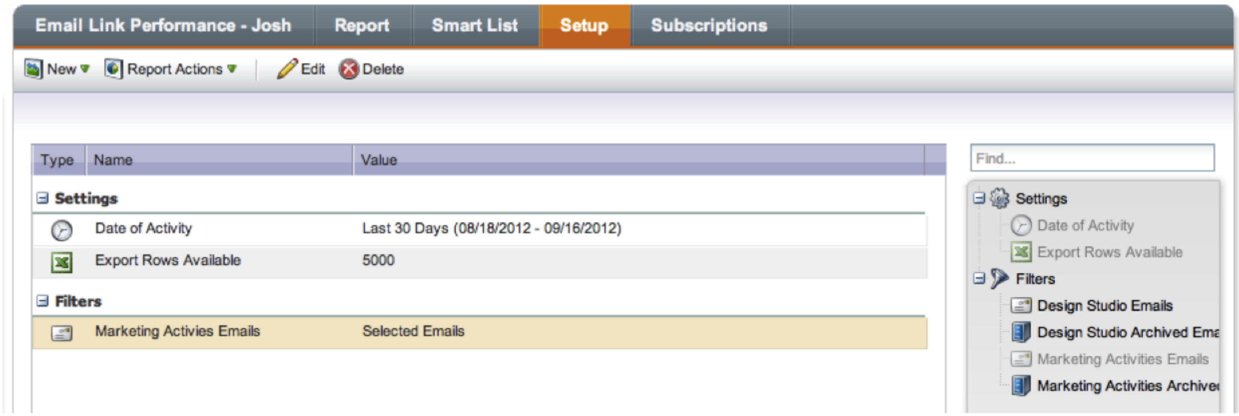
Email links are calculated on an absolute clicks basis and you can use smart list filters as a constraint here. You may also constrain the report to Marketing Activities Emails or Design Studio Emails.



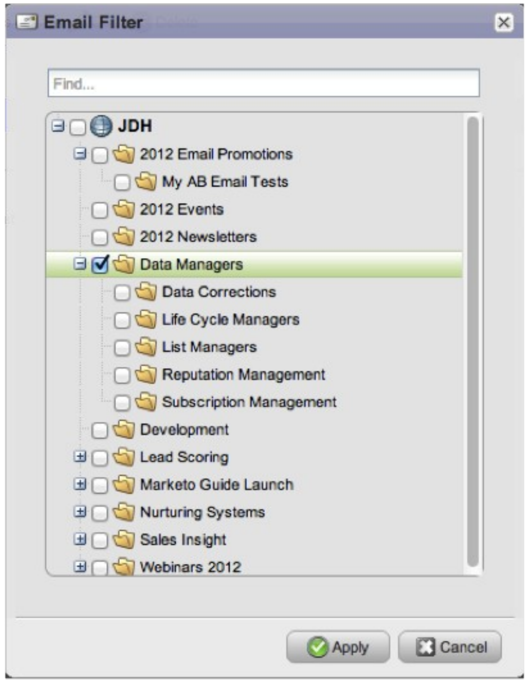
Campaign Email Performance - Customized

Note: You can select entire folders or Programs, which will include any campaigns and emails underneath.

It is also possible to create an email report for a specific campaign (or group of campaigns), which is the same as viewing the Email Tab on a Smart Campaign. Once you select the campaigns you wish to report on, Marketo will pull in all of the emails associated with each selection. If no email was sent from a select campaign, no data will appear. Only sent emails will be shown.

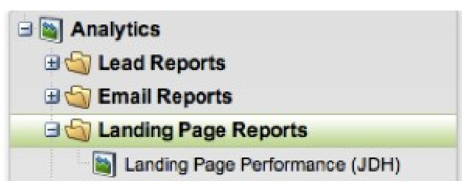


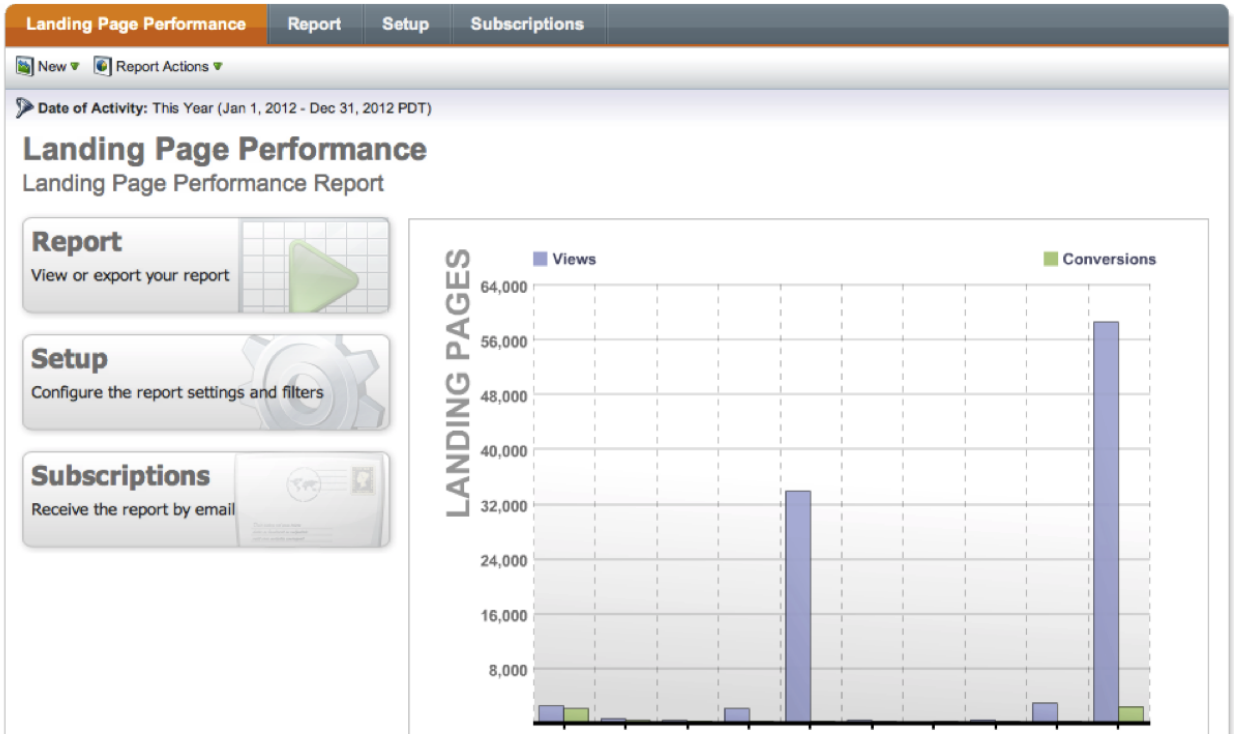
Best Practice: Use the Email Filter option for Nurturing Programs, Autoresponders, or multiple email campaigns.



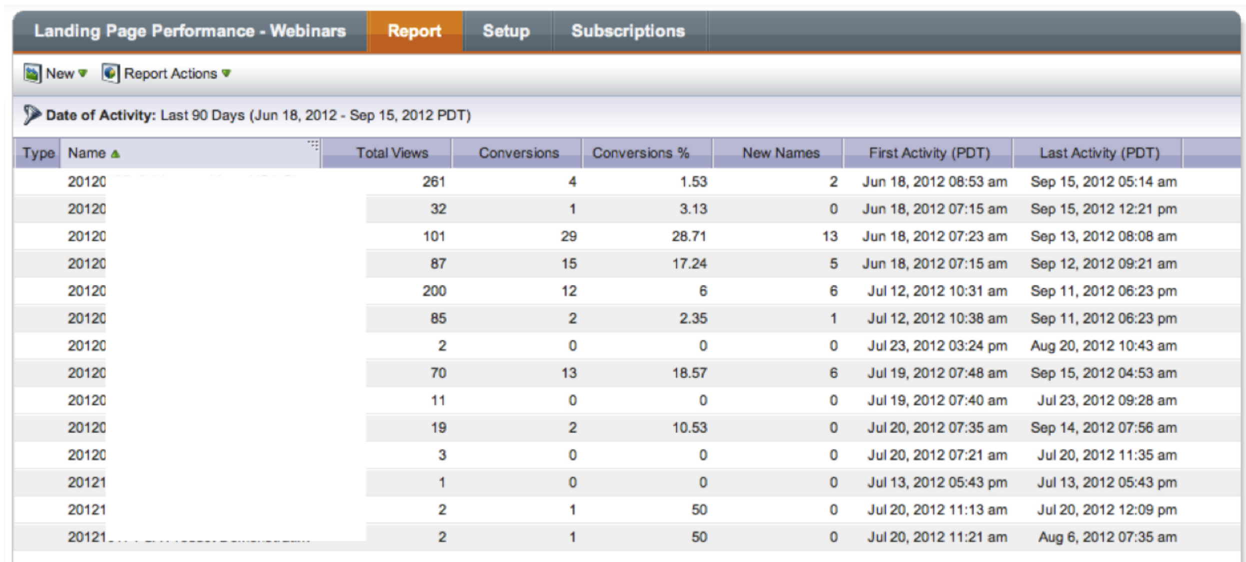
Landing Page Reports

After the Email Performance Report, the Landing Page Performance report is the second thing new Marketo users look for. Here you will be able to examine the Views and Conversion data for both regular pages and Landing Page Groups. (See more on setting up an AB Test).




Landing Page Performance
Report
Setup
Subscriptions
New
Report Actions
Date of Activity: This Year (Jan 1, 2012 - Dec 31, 2012 PDT)
Landing Page Performance
Landing Page Performance Report
Report
View or export your report
Setup
Configure the report settings and filters
Subscriptions
Receive the report by email
LANDING PAGES
Views
Conversions
64,000
56,000
48,000
40,000
32,000
24,000
16,000
8,000

Inside the Landing Page report is an excellent summary of pages by `Date of Activity`, including coveted conversion rates.


Landing Page Performance - Webinars | Report | Setup | Subscriptions

New | Report Actions

Date of Activity: Last 90 Days (Jun 18, 2012 - Sep 15, 2012 PDT)

Type	Name	Total Views	Conversions	Conversions %	New Names	First Activity (PDT)	Last Activity (PDT)
	20120	261	4	1.53	2	Jun 18, 2012 08:53 am	Sep 15, 2012 05:14 am
	20120	32	1	3.13	0	Jun 18, 2012 07:15 am	Sep 15, 2012 12:21 pm
	20120	101	29	28.71	13	Jun 18, 2012 07:23 am	Sep 13, 2012 08:08 am
	20120	87	15	17.24	5	Jun 18, 2012 07:15 am	Sep 12, 2012 09:21 am
	20120	200	12	6	6	Jul 12, 2012 10:31 am	Sep 11, 2012 06:23 pm
	20120	85	2	2.35	1	Jul 12, 2012 10:38 am	Sep 11, 2012 06:23 pm
	20120	2	0	0	0	Jul 23, 2012 03:24 pm	Aug 20, 2012 10:43 am
	20120	70	13	18.57	6	Jul 19, 2012 07:48 am	Sep 15, 2012 04:53 am
	20120	11	0	0	0	Jul 19, 2012 07:40 am	Jul 23, 2012 09:28 am
	20120	19	2	10.53	0	Jul 20, 2012 07:35 am	Sep 14, 2012 07:56 am
	20120	3	0	0	0	Jul 20, 2012 07:21 am	Jul 20, 2012 11:35 am
	20121	1	0	0	0	Jul 13, 2012 05:43 pm	Jul 13, 2012 05:43 pm
	20121	2	1	50	0	Jul 20, 2012 11:13 am	Jul 20, 2012 12:09 pm
	20121	2	1	50	0	Jul 20, 2012 11:21 am	Aug 6, 2012 07:35 am

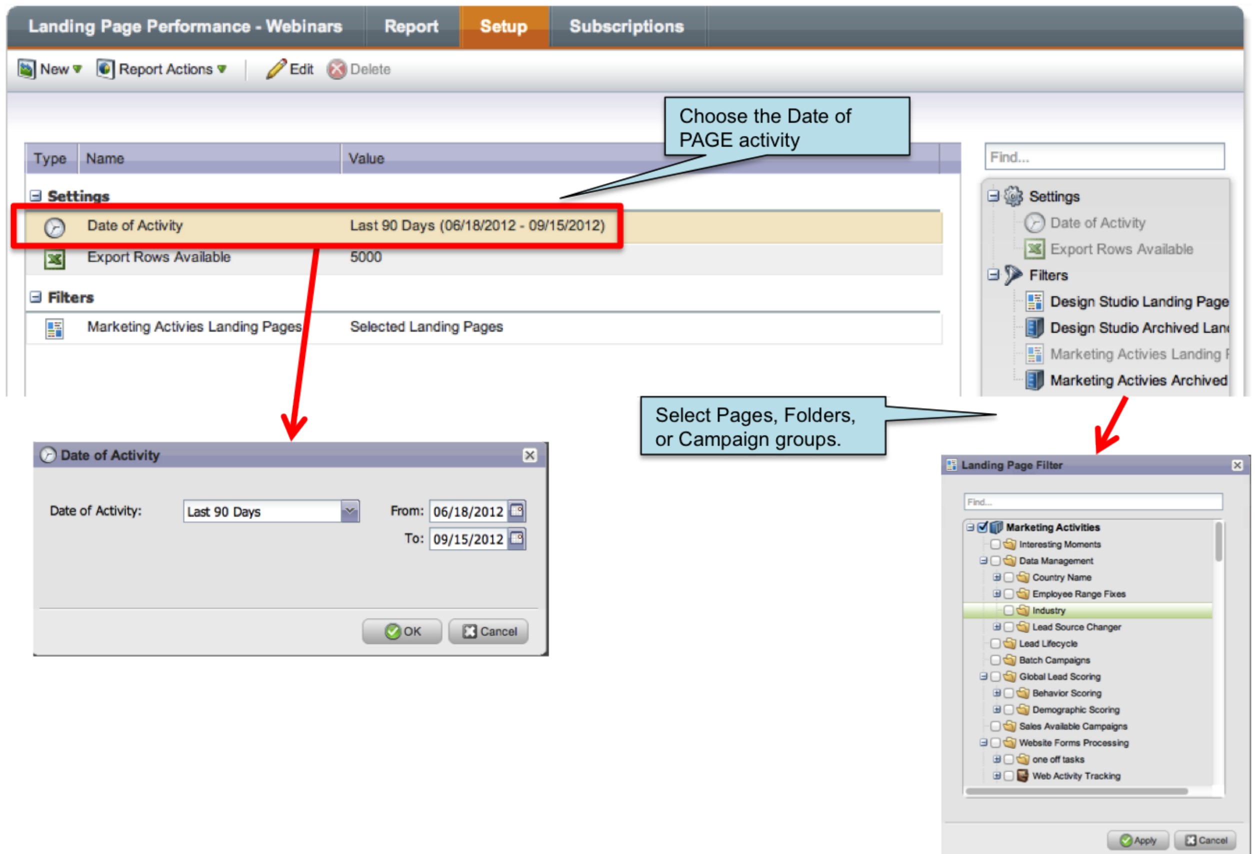
Activity on Marketo Landing Pages is counted here. This report **does not show data** on your own website. See the Web Page Activity report for leads visiting your main site.

Column Name in Report	Marketo's Description	What This Means for You
Type	Page or Landing Group AB [ICON]	AB Landing Page Groups are shown here as well.
Name	Name of Landing Page inside Marketo	This is the internal name you use in Marketo (not the URL or Title)
Views	Total Page Views for time period.	
Conversion	Number of Form Fill Outs on this page during the time period.	
Conversion %	Conversions / Views = %	The big number everyone wants to see. Get it ready for Whichtestwon.com
New Names	Number of New Names acquired by page	Previously unknown names acquired by…similar to the Acquired By Concept in Programs.
First Activity	Date and time of the first visit	Based on system time zone

Column Name in Report	Marketo's Description	What This Means for You
Last Activity	Date and time of most recent visit	Based on system time zone

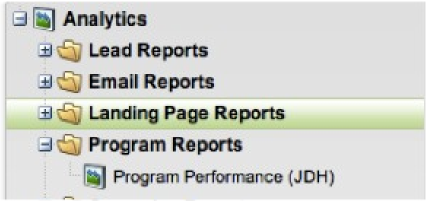
The Landing Page Performance report allows only Setup constraints:

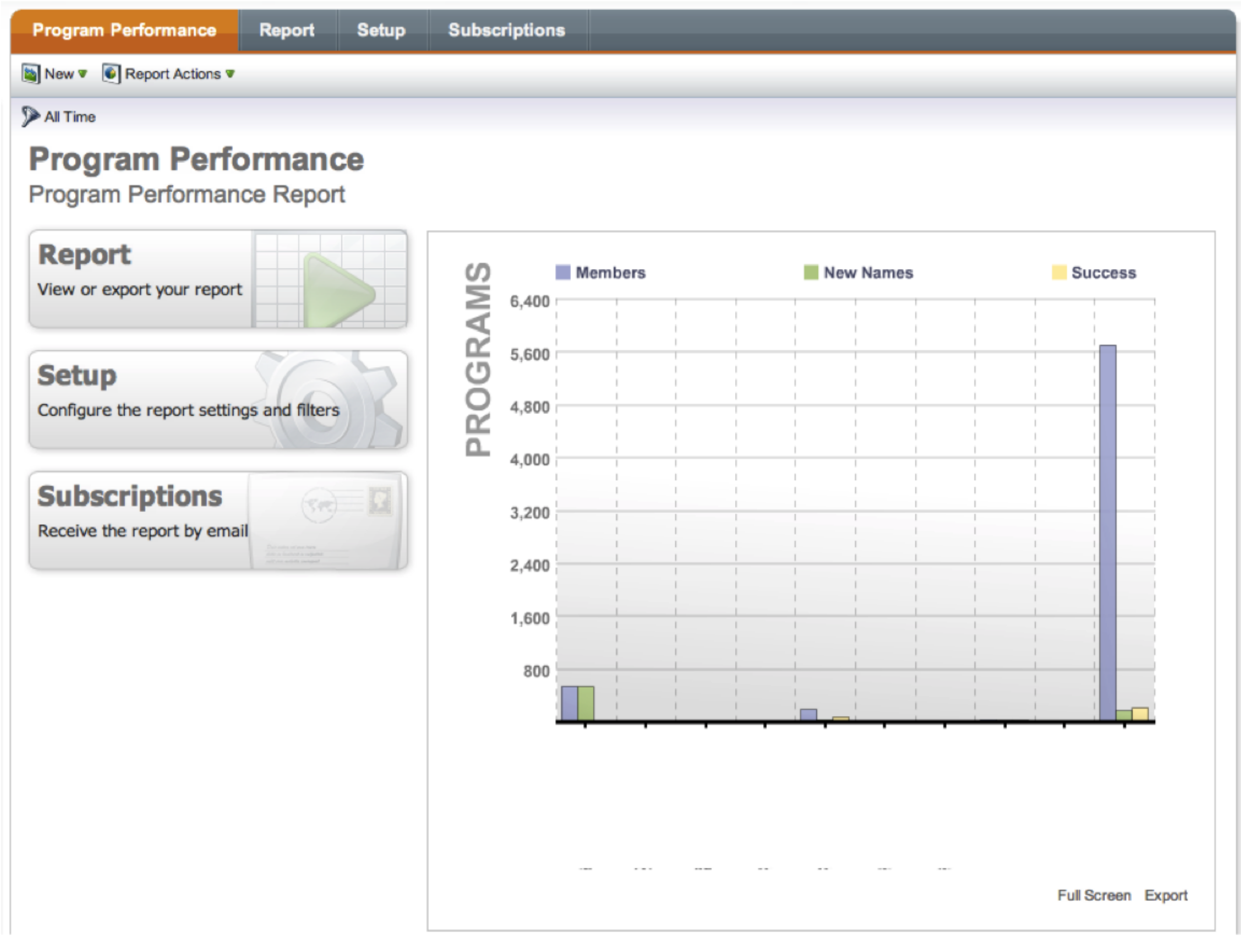
- Date of Activity
- Design Studio Pages
- Marketing Activities Pages (Programs)



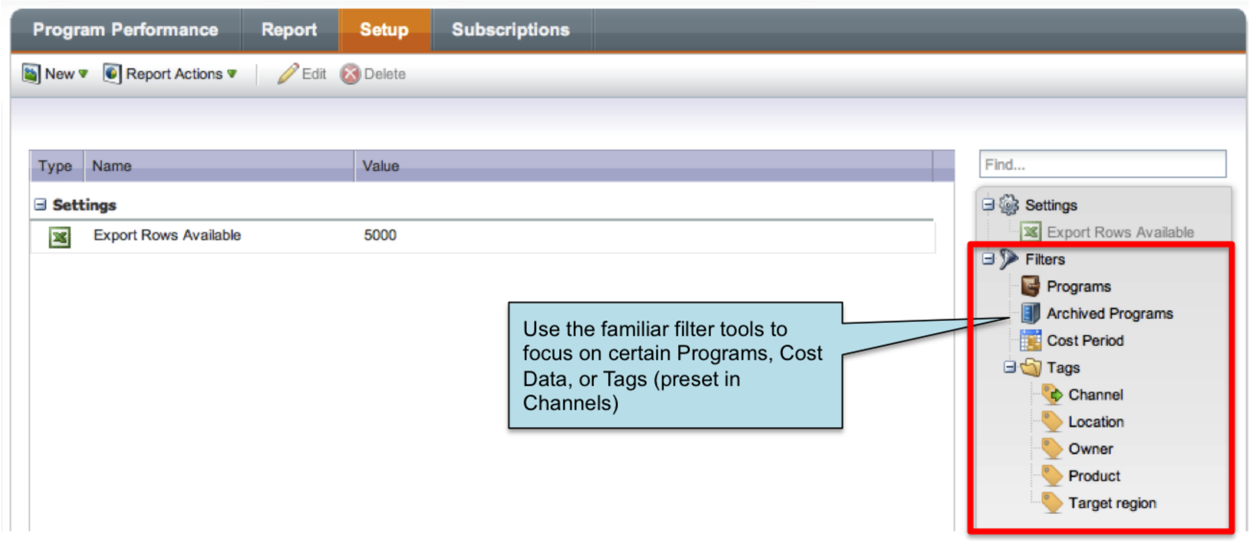
Program Reports

Program Performance Reports are also available, and best used in tandem with RCA. You can also visit the Program's Overview for active campaign data.

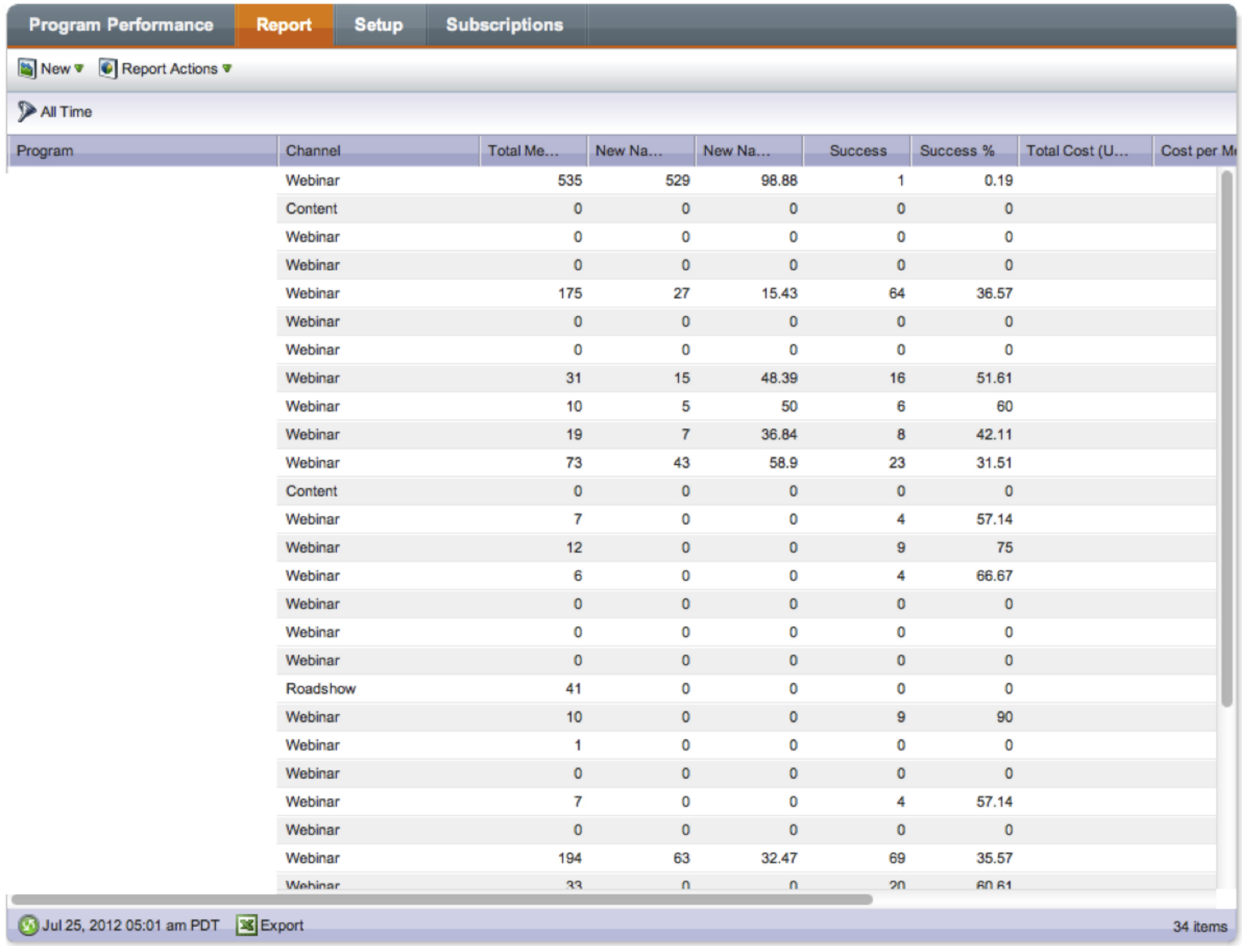



Program Performance
Report
Setup
Subscriptions
New
Report Actions
All Time
Program Performance
Program Performance Report
Report
View or export your report
Setup
Configure the report settings and filters
Subscriptions
Receive the report by email
PROGRAMS
Members
New Names
Success
6,400
5,600
4,800
4,000
3,200
2,400
1,600
800
Full Screen
Export

The Program Performance Report will go through the basics, however, at this time (March 2013), there is limited functionality. You can filter on Program, Archived, Cost Period, and Tags/Channels.



The Program Performance Report is similar to the Campaign Performance Report, but with handy ROI calculations built in, assuming you entered in cost data.



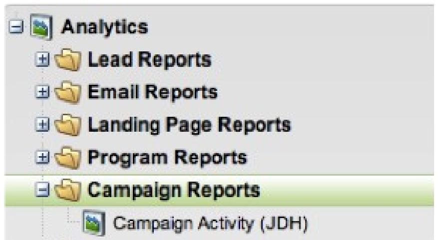
Program	Channel	Total Me...	New Na...	New Na...	Success	Success %	Total Cost (U...	Cost per M
	Webinar	535	529	98.88	1	0.19		
	Content	0	0	0	0	0		
	Webinar	0	0	0	0	0		
	Webinar	0	0	0	0	0		
	Webinar	175	27	15.43	64	36.57		
	Webinar	0	0	0	0	0		
	Webinar	0	0	0	0	0		
	Webinar	31	15	48.39	16	51.61		
	Webinar	10	5	50	6	60		
	Webinar	19	7	36.84	8	42.11		
	Webinar	73	43	58.9	23	31.51		
	Content	0	0	0	0	0		
	Webinar	7	0	0	4	57.14		
	Webinar	12	0	0	9	75		
	Webinar	6	0	0	4	66.67		
	Webinar	0	0	0	0	0		
	Webinar	0	0	0	0	0		
	Webinar	0	0	0	0	0		
	Roadshow	41	0	0	0	0		
	Webinar	10	0	0	9	90		
	Webinar	1	0	0	0	0		
	Webinar	0	0	0	0	0		
	Webinar	7	0	0	4	57.14		
	Webinar	0	0	0	0	0		
	Webinar	194	63	32.47	69	35.57		
	Webinar	33	0	0	20	60.61		

Program Performance reports provide several default columns, which provide helpful comparisons—if you properly setup the Cost and other Tags.

Column Name in Report	Marketo's Description	What This Means for You
Program Name	Program Name.	Click on the link to visit the Program.
Channel	Program's Channel	
Total Members	Total Membership	Also visible on Program Member tab
New Names	Total New Names Acquired	Should equal Acquired count on Program Summary tab.
New Names %	New Names / Total Members	Key metric!
Success count	Leads with a Success Flag (only counts one success per lead)	This highly depends on your Channel setup. It is possible to have every status be a Success, and your Success Count = Total Members in that case. Of course, that is not recommended.
Success %	Success Count / Total Members	Another Key Metric.
Total Cost	Based on system currency if you placed a cost in the Program. (Sum of all period costs)	This is from the Period Cost data you entered on the Program Setup tab. Shows 0 if no cost entered.
Cost per Member	Member / Cost = CPM	Depending on your reporting, this is the Cost per Lead (CPL). Based on system currency
Cost per New Name	New Name / Cost = CPL	Cost per Acquisition (can also be CPL). Based on system currency
Cost per Success	Success # / Cost = CP	Cost per Success is unique to your Channel setup and may not be equivalent to a Won Opp. Based on system currency

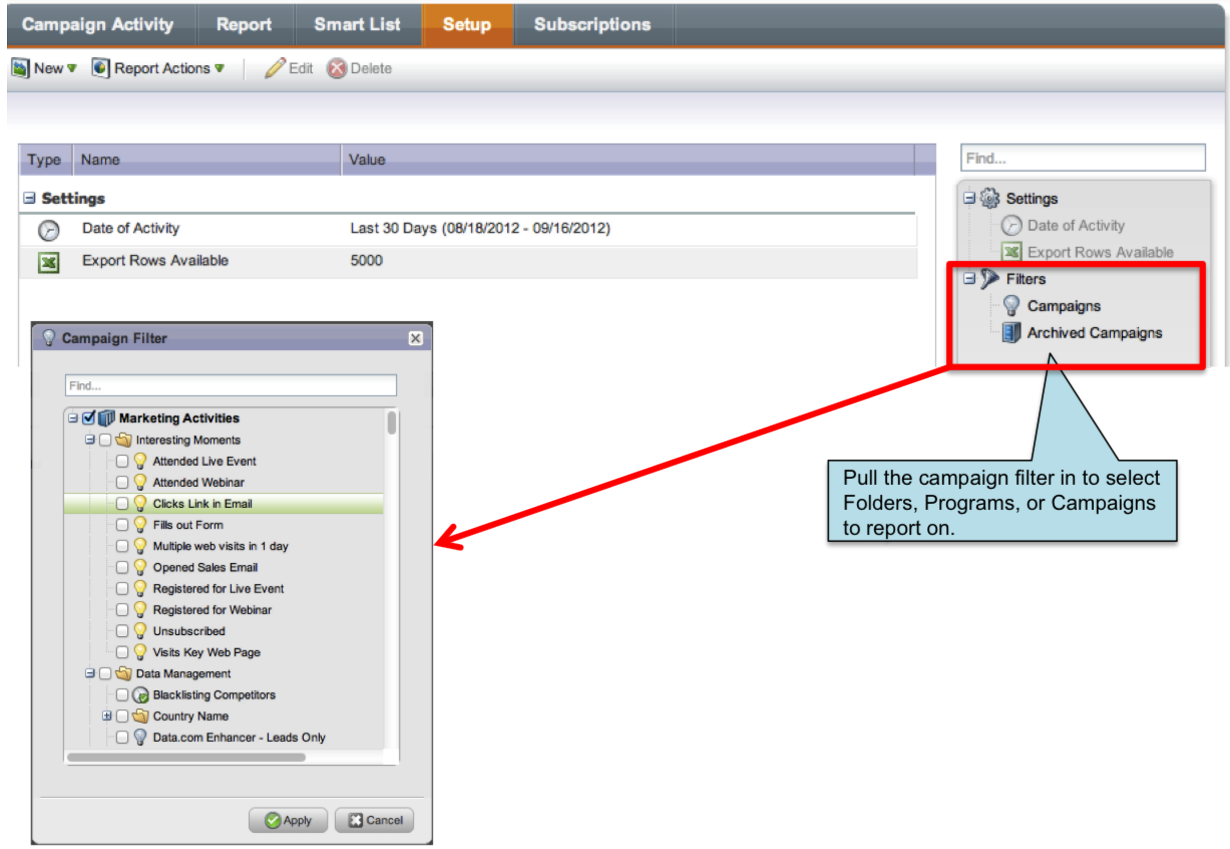
Campaign Reports

Campaign Reports can be powerful allies in the monitoring of automatic campaigns. While folder level overviews and campaign overviews show helpful summaries of Members, Wait Step Members, and Last Run, the Campaign Activity report roles this up into one report.



Campaign Activity can be constrained by

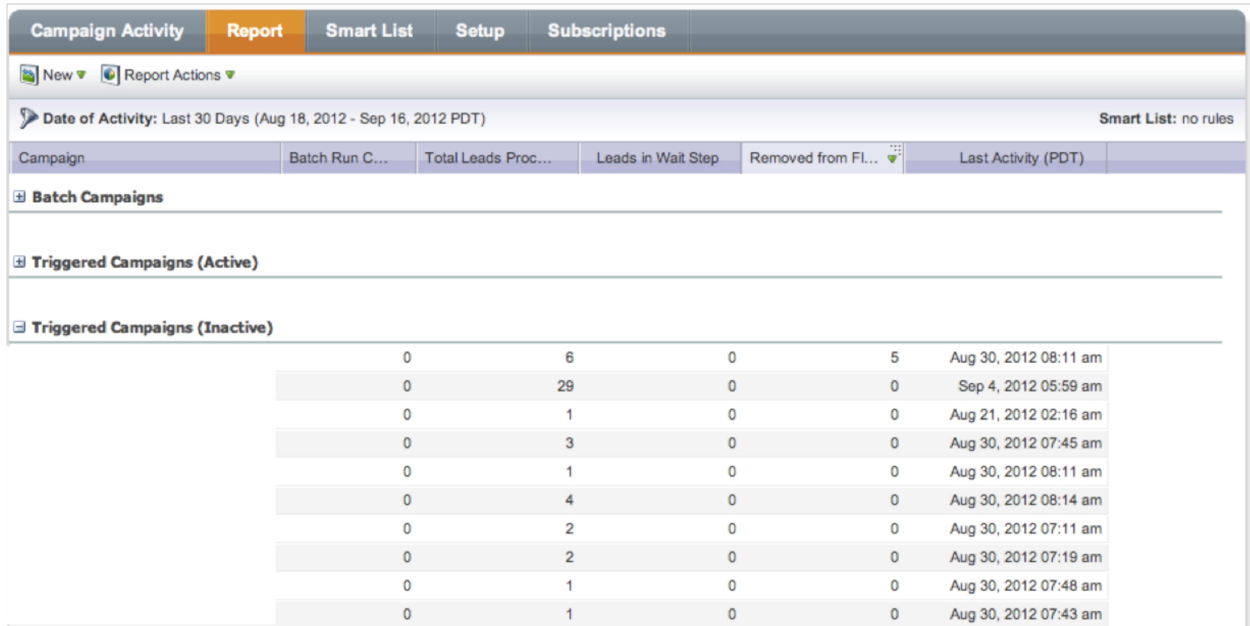
- Date of Activity – from first run
- Export Rows
- Campaign Selection
- Archived Campaign Selection
- Smart Lists



Once you select the Campaigns to report on (default is All), you can use Smart Lists to report on specific kinds of leads, such as All Campaigns where `Customer = True`. The report appears.

Campaigns are grouped by

- Batch
- Run Actions (manual flow actions in a lead database view).
- Triggered (Active) – Live triggers
- Triggered (Inactive) – past triggers.



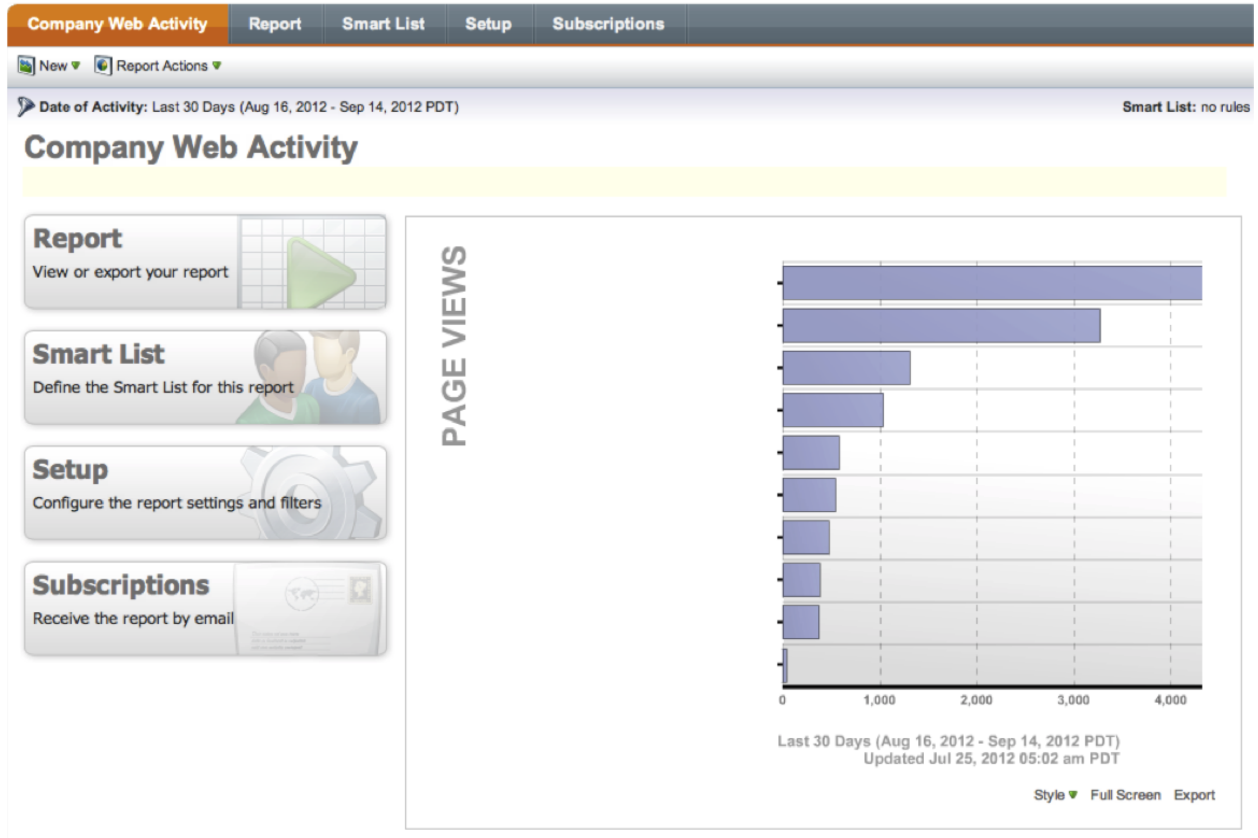
Here is more detail on what the report is telling you.

Column Name in Report	Marketo's Description	What This Means for You
Campaign Name	Name of Campaign	Click on it to view the campaign itself
Batch Run Count	Times a batch campaign was run	Most batches are Run Once or Run Every X Days (lead scoring).
Total Leads Processed	How many leads qualified for the flow?	Who went through the flow?
Leads in Wait Step	Number of Leads in an Active Wait Step	Useful for reviewing multiple drips or processing campaigns.
Removed from Flow	Number of leads removed from the campaign	This is the only place to view the number of successful removals.
Last Activity (System Time Zone)	Last time a lead was processed.	Could be helpful in tracking errors.

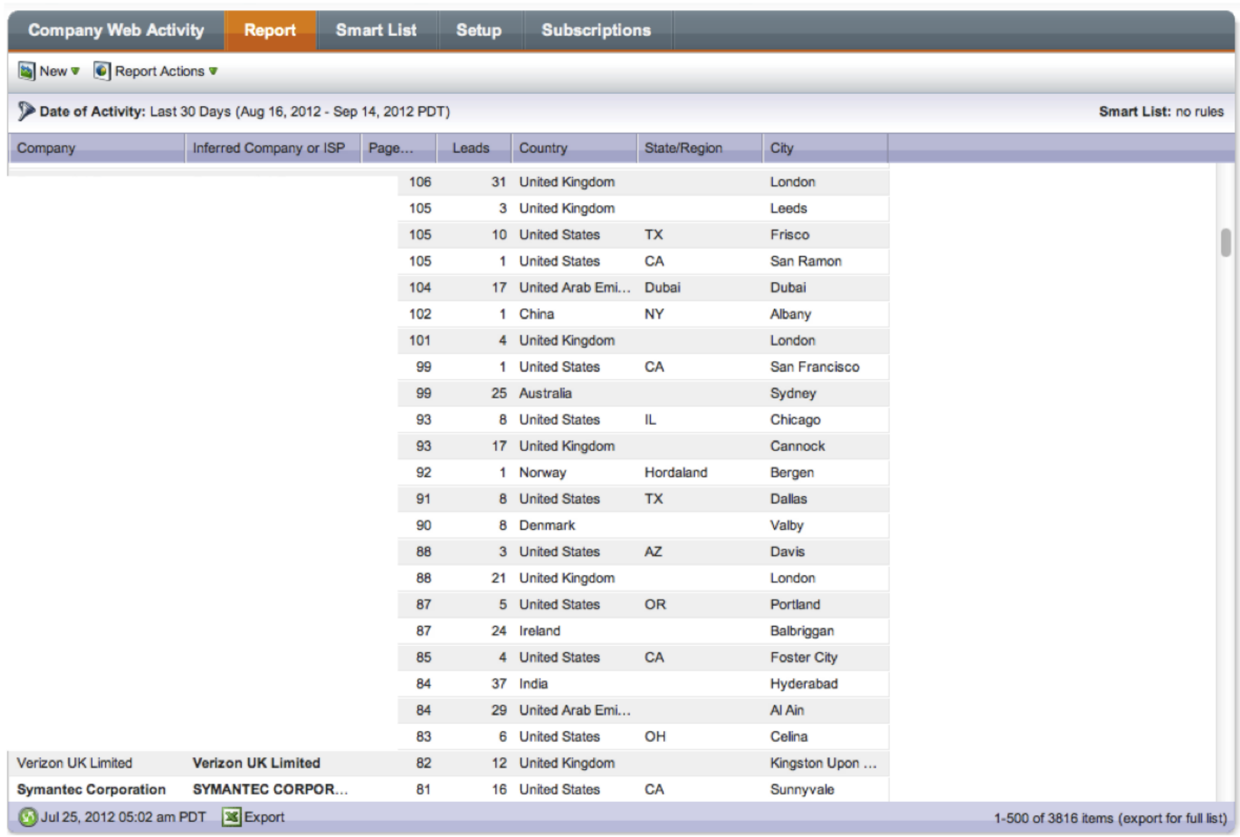
Company Reports (Company Web Activity)

Warning: if Munchkin code is not installed on your website, you will see nothing here or in the Web Page Report.

The Company Web Activity Report is similar to Web Page Activity Report, but grouped by Company. This is the one of the reports Marketo salespeople like to use in sales calls and the same data drives the Anonymous Web Activity Report on the SFDC Sales Insight Tab.



The report tells you which firms are on your website and landing pages using Inferred Company and ISP data. Like the Web Page Reports, the default is to show you both Anonymous and Known Leads. Be sure to clone this report into separate versions if you want to parse out Known vs. Anonymous.



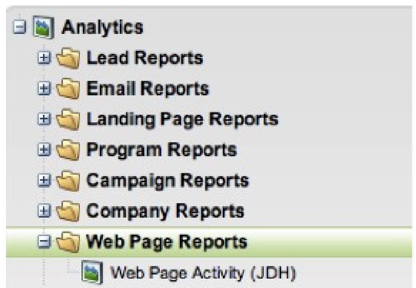
The Company Web Activity report can be helpful with your Strategic Account sales strategy for analyzing who is finding your site.

Column Name in Report	Marketo's Description	What This Means for You
Company	Company (bold indicates a known lead)	Is this a real firm? Sometimes this references an ISP. You will see multiple rows of the same firm if separate divisions or locations were identified.
Inferred Company/ISP	IP Lookup helps guess the company using that IP.	This will also show ISP data. If Company and Inferred Company match, this is a stronger indication.
Page Views	Number of pages in this session.	

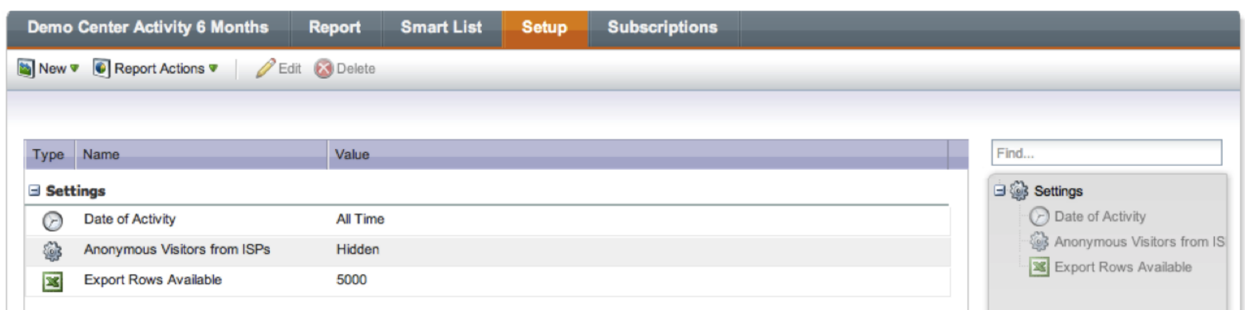
Column Name in Report	Marketo's Description	What This Means for You
Leads	Total number of leads (known and unknown) that visited from this Company.	
Country	If Available	
State/Region	If Available	
City	If Available	
First Visit	Date and time of the first visit	Based on system time zone
Last Visit	Date and time of most recent visit	Based on system time zone

Web Page Reports

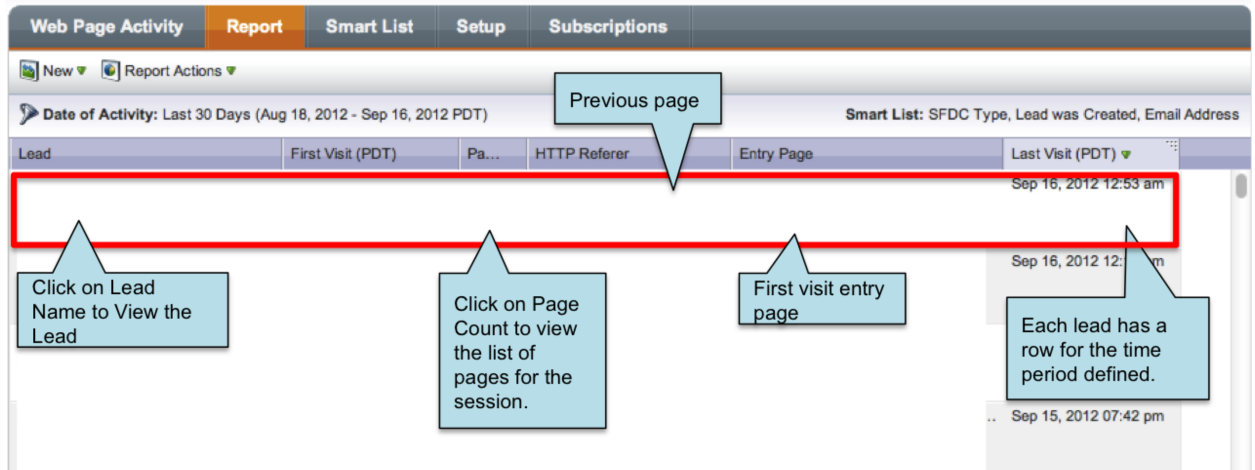
The Web Page Activity report (and Company Web Activity Report) collate data on all leads that visit the site and are tagged with a cookie via the Munchkin code. This report is a bit different because it is grouped by Lead Name instead of tabulating data.



The default report shows Anonymous and Known leads. Be sure to clone this report if you want to filter out Anonymous or Known leads.



Clicking on a Lead Name will show you their Lead Record.



Click on the `Page Views count` to see a list of pages the lead viewed. And more detail on what you are seeing in this report.

Column Name in Report	Marketo's Description	What This Means for You
Lead Name	Name and Company Anonymous	Click to open and view the Lead Record.
First Visit	Date and time of first visit.	Based on System Time Zone. If a lead cleared his cookies and change an email address, this data may be split.
Page Views	Number of Page Views in this session	Click to view pages visited.
HTTP Referrer	Original page URL the lead was on before this first visit.	Could be helpful to see which pages or ads are performing. Show the URL as a link you can click.
Entry Page	First page the lead visited on the site.	Shows the URL that you can click on.
Lead Name	Actual lead name if available.	
Job Title	If Available.	
Company	If available.	Bold indicates real company name.

Column Name in Report	Marketo's Description	What This Means for You
Inferred Company/ISP	IP Lookup helps guess the company using that IP.	This will also show ISP data. If Company and Inferred Company match, this is a stronger indication.
Inferred Country	If available	Fairly accurate
Inferred State/Region	If available	Sometimes accurate
Inferred City	If available	Not always accurate
Inferred Area Code		Remarkably accurate
Last Visit	Time and date of most recent visit to the site.	

Social Influence Report

Note: this report does not have its own folder.

Marketo added the social influence tools to Landing Pages to enable better sharing of pages. If you setup this sharing properly, you will see social counts on Landing Page Performance reports as well as on the special Social Influence Report.

There are limited Setup options, so the default report should be enough. To learn more, visit the Marketo Community.

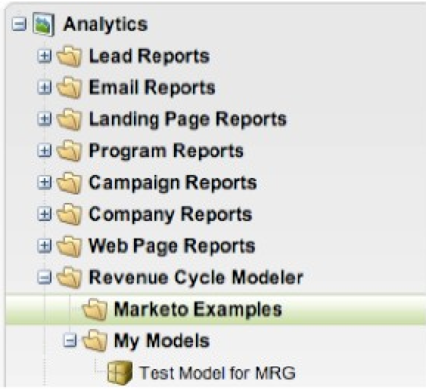
View Social Influence Report [Marketo]

Social Sharing Instructions [Marketo]

Revenue Cycle Modeler

I am grateful to Alexandre Pelletier who gave this presentation with Jon Miller at the Marketo 2012 Summit. You can reach Alexandre at +1.514.913.3039 or on his site http://www.apelletier.com. He has allowed me to use portions of it to help explain what happens in RCA.

I'm going to be super honest here. Revenue Cycle Modeler is a fantastic tool that Marketo uses to wow you on their analytics capabilities. And it is pretty amazing. There's a catch though (isn't there always?). RCM requires a fair amount of thought and setup time to work well. RCM is also a pre-cursor to Revenue Cycle Analytics, so you want to be sure to get this one right.



Feel free to try it out in draft mode. Here are a few tips:

1. Determine Revenue Stages First
2. Update or use existing Status, Source, and other triggers in your system.
3. Map it Out in RCM
4. Create Smart Lists for each Stage
5. Create a folder for RCM Manager or a Program
6. Add appropriate Trigger campaigns to manage changes between stages based on your pre-determined fields. Do not turn these on yet.
7. Test This Heavily.
8. Re-work the smart lists and stages if needed.
9. Try turning on the RCM flows.
10. Activate your RCM.

Alex has a few good ideas in his presentation, which I will share here. In particular, Alex suggests the following lessons:

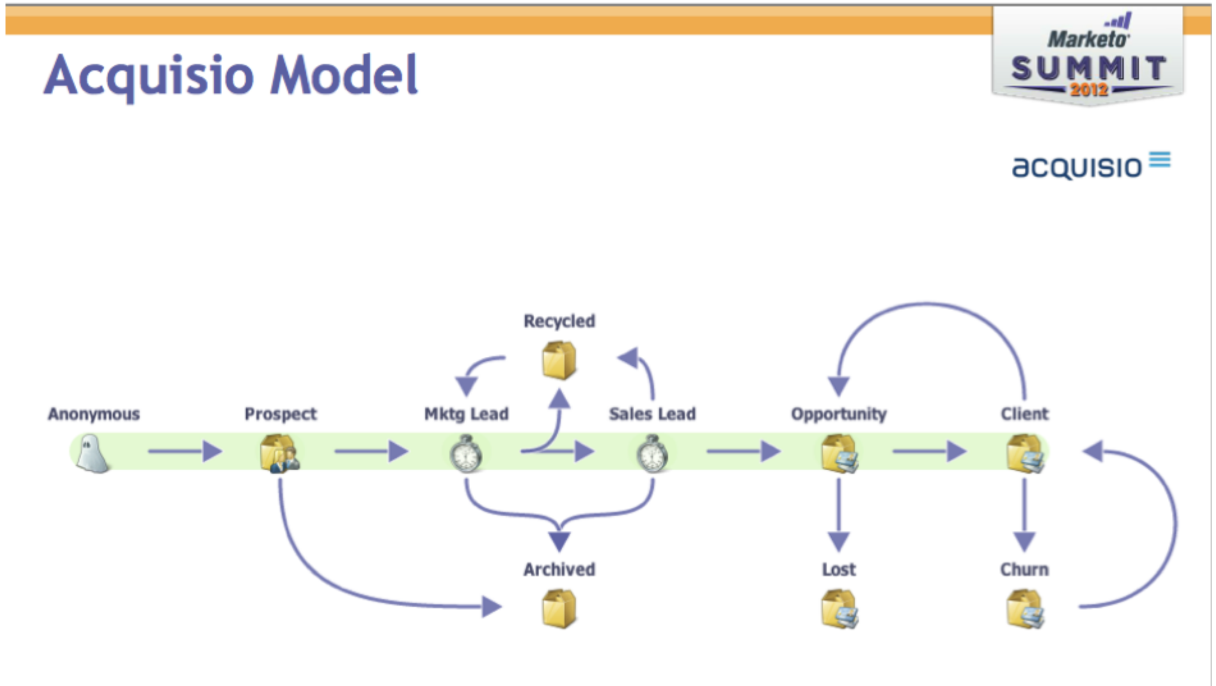
- Use the model as a communications tool between sales and marketing.
- Optimization may take months.
- Once it is complete, don't change it.
- Use the other parts of RCA if you can.

Planning for RCM

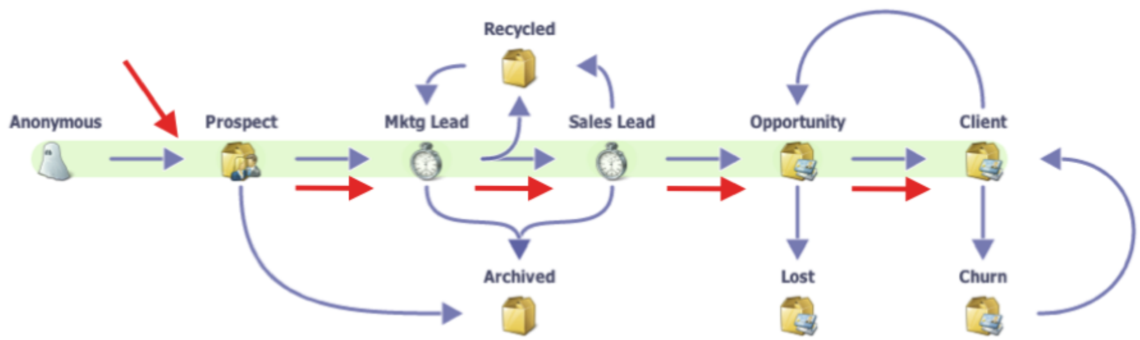
To get started, draft your success path stages very carefully on paper first. Since your expected lead flow must be done in advance, be aware if Leads will enter at any stage or just in one spot.

Prospect	Mktg Lead	Sales Lead	Opportunity	Client
All Names	Inquiry	Agency > 30k	Want Demo	Is a client
	Score above threshold	Advertiser > 100k	Project > 120 days	
		Ask technical questions		
	SLA: 21 days	SLA: 7 days		

When you design the model, it should be very simple with as few transitions as possible. Here's what Alex did at Acquisio. This is elegant.

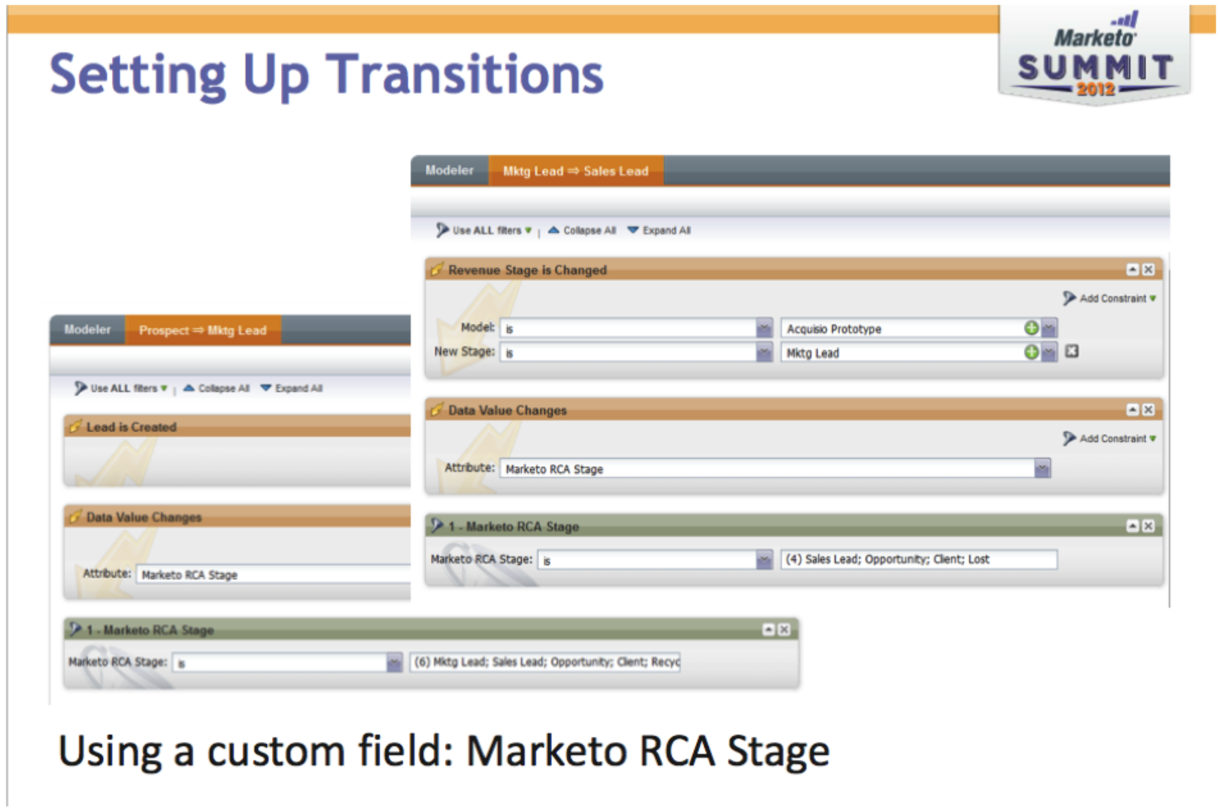


Watch out for where the leads come into your funnel.

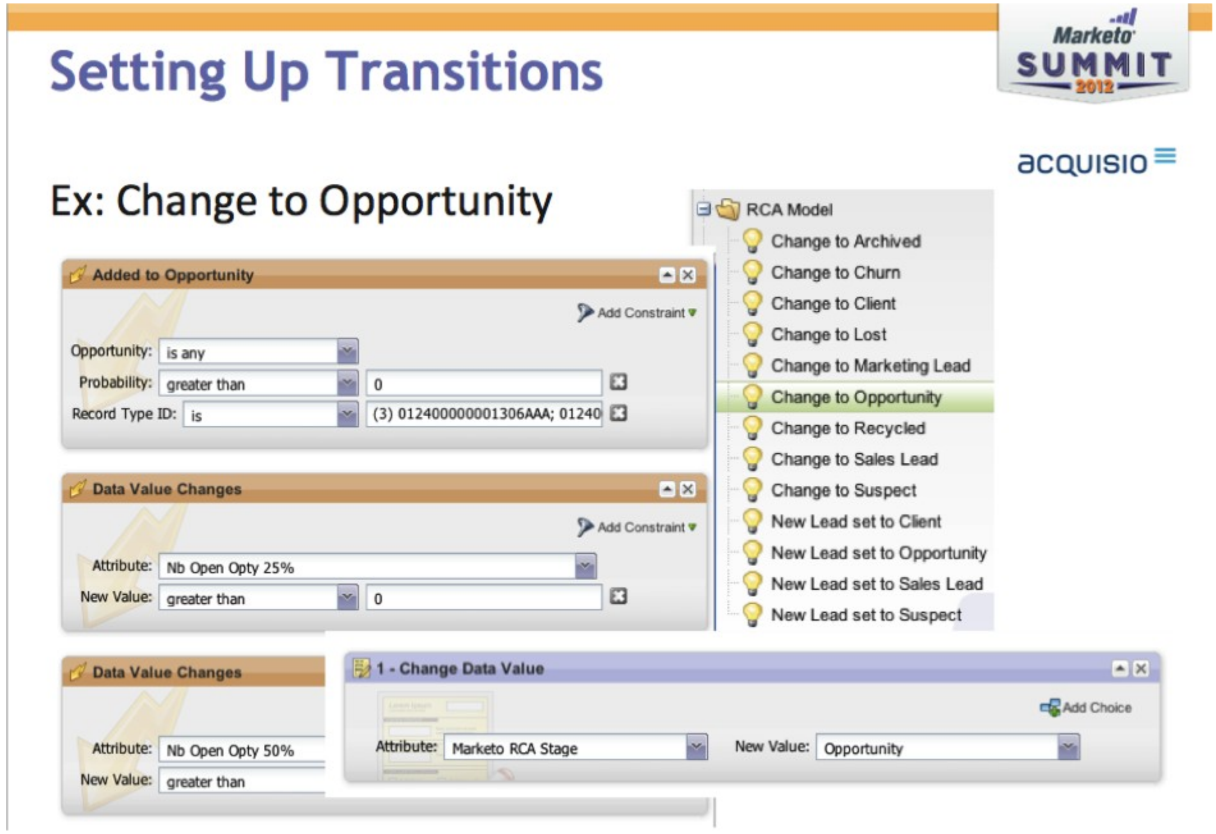


Setting Up Transitions Between Stages

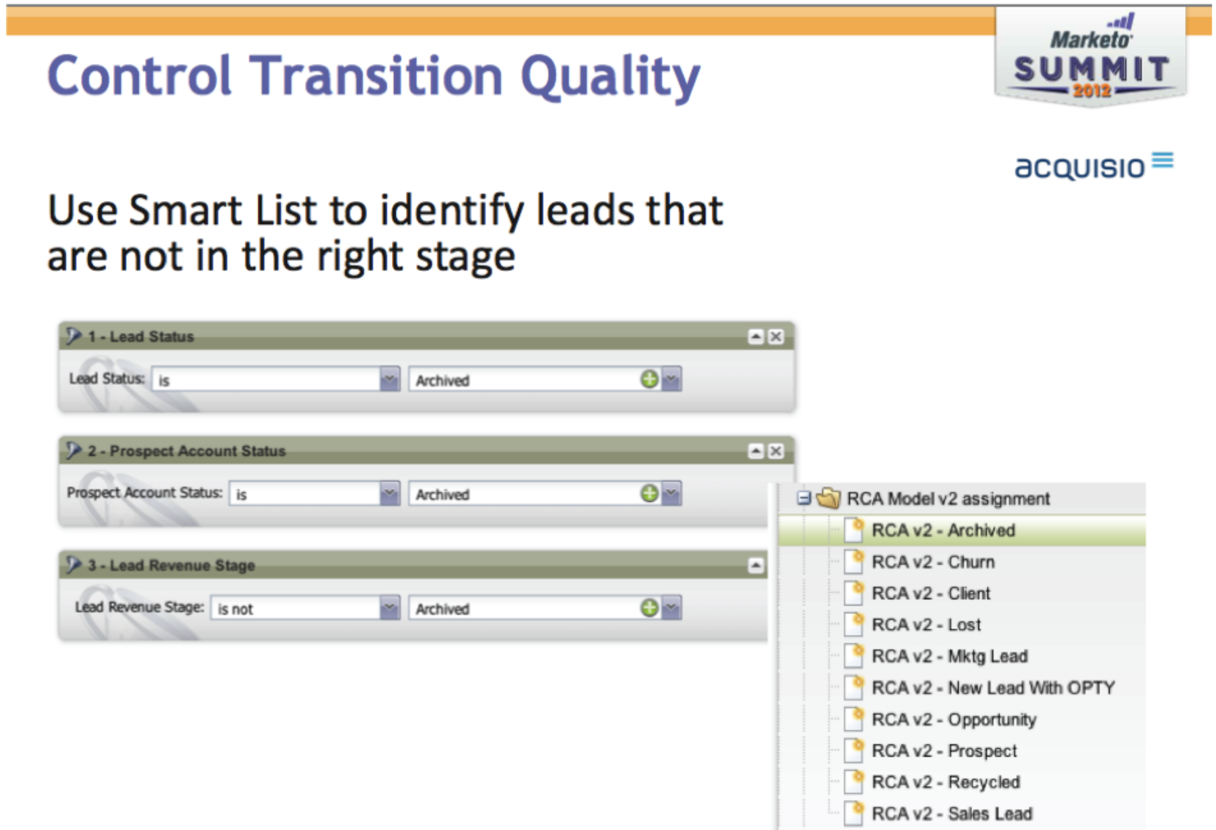
Make sure these are well defined. Alex added a custom field called `Marketo RCA Stage` to help ensure leads were always in the right Stage. Each transition requires a trigger campaign based on the criteria such as `Added to Opportunity` or `Lead Is Created`.



And with Opportunity transitions:



As part of this process, you must control leads that are in the wrong Stages using Smart Lists.



Key Lessons

- Log all Interesting Moments because they drive the Opportunity Analyzer.
- Opportunities must have a Contact Role for the Opportunity Analyzer to work.

Use the Model to report on your funnel. Now you're marketing like Marketo!

And the Holy Grail of Demand Generation, the automated lead funnel report:

Revenue Cycle Analytics

RCA requires a lot of thought. If you are planning for RCA I recommend the following basic steps with a few screen shots courtesy of Alex and Jon's presentation.

Step 1: Setup Custom Tags

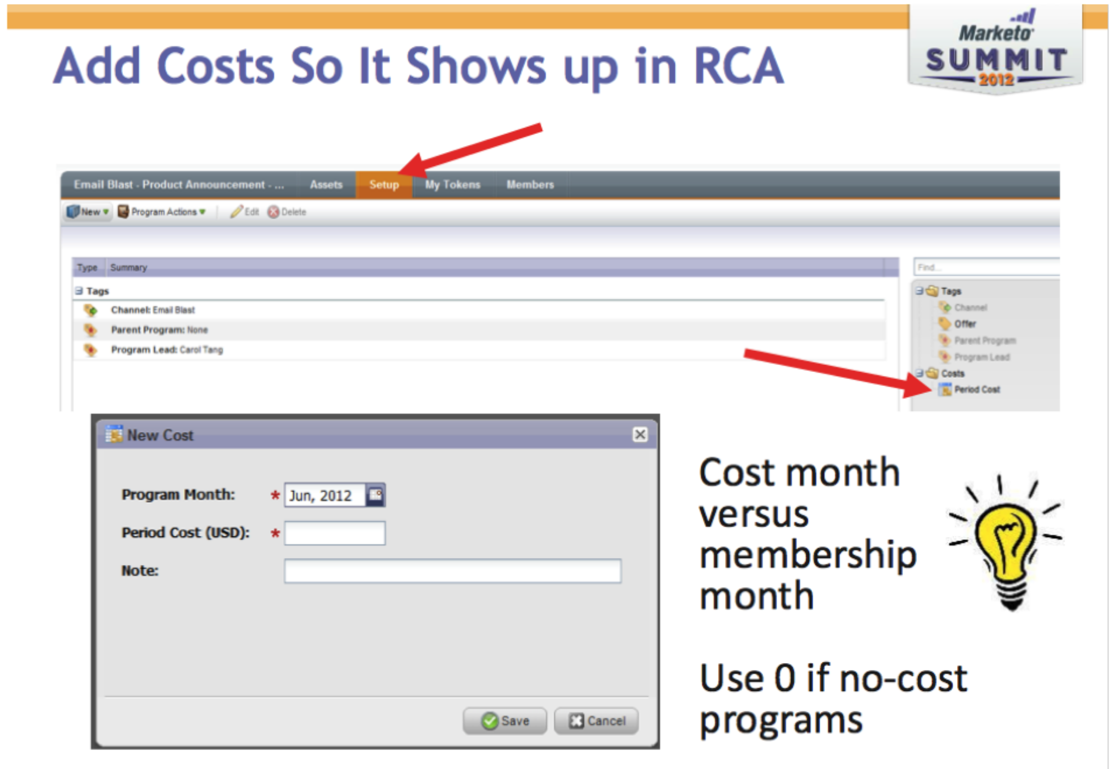
Custom tags will help you automatically conduct Cross-tab and group by reports. These special tags will also appear on your Program Channels if you use all of the setup options.

Step 2: Setup Custom Program Channels

Or use the defaults, but you may want to have your own Channels, which better match your business needs. The Success Progression Status *does matter* for RCA so be sure to carefully define these.

Step 3: Fill in all the details on Programs

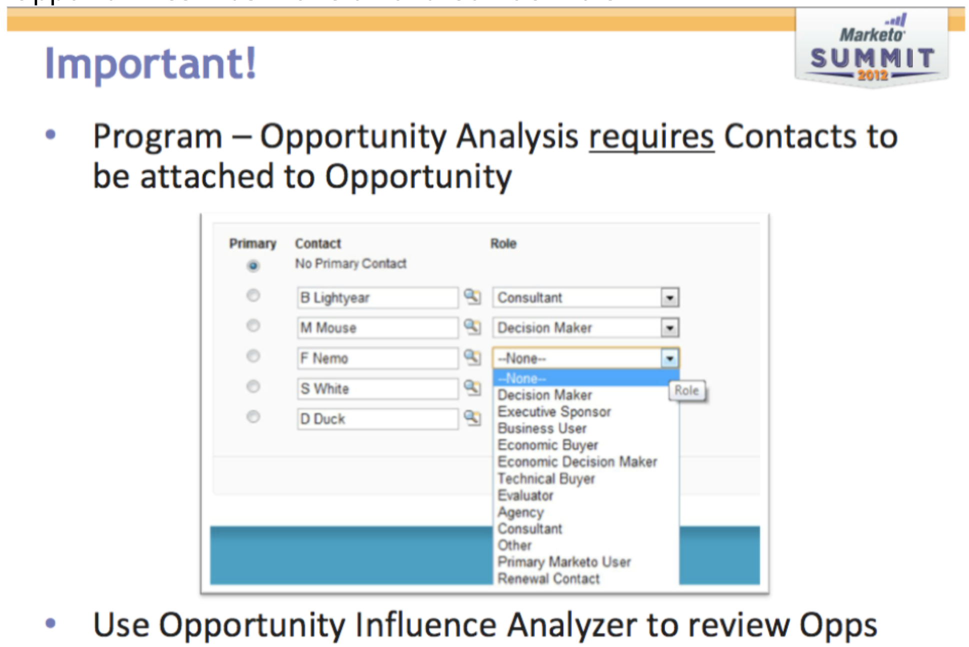
Seriously. Don't bother paying for RCA if you don't enforce the use of Tags and Costs.



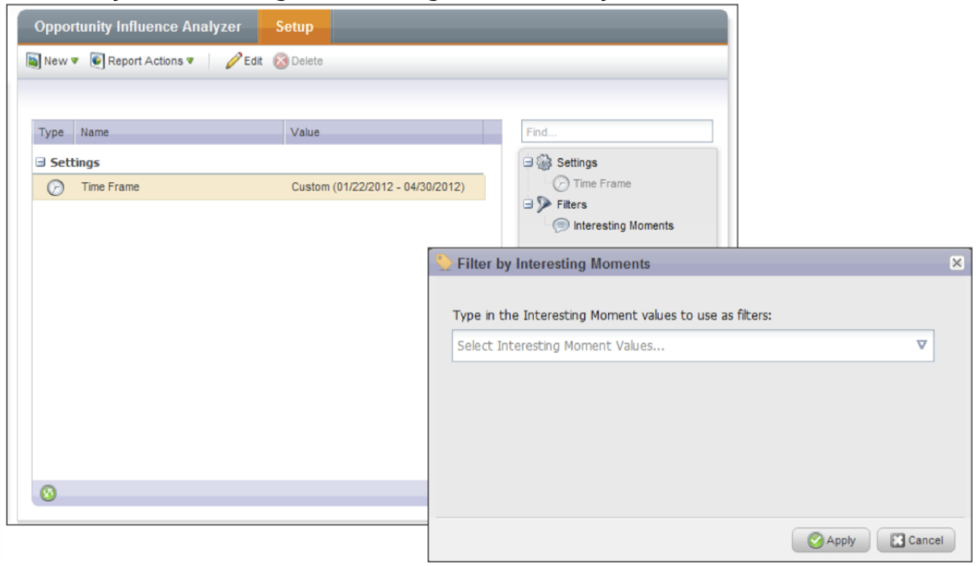
Step 4: Use Programs for all ROI Tracked Marketing Programs

You can use Programs in all sorts of ways, but always use them for your tracked and incentivized marketing programs.

Step 5: All Opportunities must have a valid Contact Role



Step 6: Have a Fully Functioning Interesting Moments System.



Step 7: Run those RCA Reports

How to Customize Reports

In this section we will learn how to conduct more sophisticated reporting using the standard Analytics options provided in Marketo. We will not review RCM or RCA at this time. Instead, I’ll show you how to make the most of what comes with your typical Marketo package.

Note: cross-tabs are limited to Drill Downs unless you subscribe to RCA.

Marketo Reports have limited cross-tab capabilities, especially when viewing multiple dimensions over time and with Opportunity details. To conduct this type of analysis, you may need to download data, use Salesforce Reports, or subscribe to Marketo’s powerful Revenue Cycle Analytics.

I’ve recreated Marketo’s summary of what’s possible with each report type. Remember, this is for the standard or Enterprise versions without RCA. A ✔ denotes this option is available for that report.

Report Type	Time Range	Groups	Opp Cols	Drill Down	Smart List Column	Select Folders, Assets, or Flows	Cost Period	Tags
Lead Performance	✔	✔	✔	✔	✔	✔		
Leads by Status	✔	✔	✔					
Leads by Campaign	✔	✔	✔		✔			
Leads by Campaign Folder	✔		✔		✔			
Email Performance	✔					✔		
Email Link Performance	✔					✔		
Campaign Activity	✔					✔		
Lead Web Activity	✔							

Report Type	Time Range	Groups	Opp Cols	Drill Down	Smart List Column	Select Folders, Assets, or Flows	Cost Period	Tags
Company Web Activity	✔							
Program Reports						✔	✔	✔

Lead Report Customization

Report by Lead showing demographics and activity counts. Here's an idea that you might find helpful.

You can pull a report that looks at custom fields. Add a custom field to your report as a column. Create a Smart List in the lead database, and then use the Add Custom Column option in many reports to pull it in as a column.

Lead Performance reports are probably the most useful aside from the Email Performance data. While you can use your CRM reporting to accomplish many of the same tasks, Marketo is sometimes better. Salesforce's reporting limitation on Leads and Contacts makes it harder to see through the entire lead lifecycle. Marketo's Lead Reports are able to see across the entire cycle.

I will show you how to customize the base Lead Performance Report to group leads into different kinds of reports. In fact, Marketo offers a few of these as default options when you go to New>New Report.

- Leads by Month [default]
- Leads by Original Search Phrase [custom]
- Leads by Revenue Stage [default]
- Leads by Source [default]
- Leads by Revenue Stage [default]

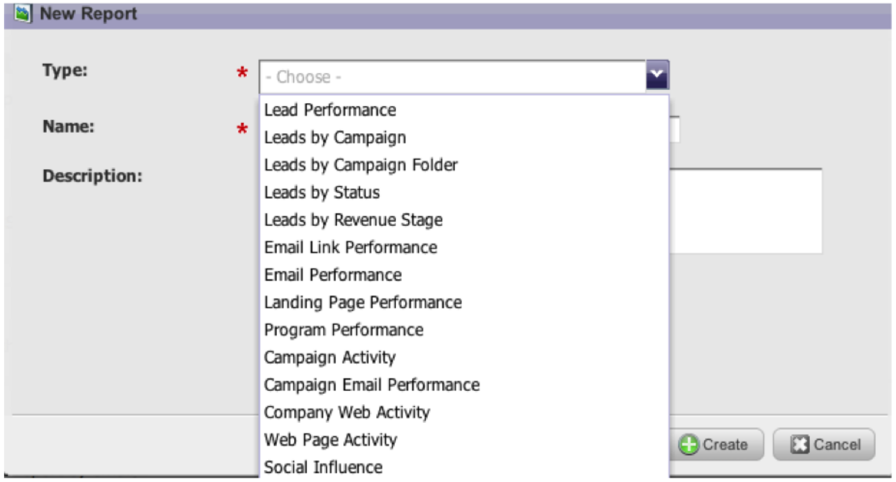
Campaign Lead Reports can include a Campaign Influenced Opportunities report.

Of course, use this knowledge to design the reports that work for your business needs. I'll do my best to be your Guide.

Lead Performance Reports

The base Lead Performance report is hidden. (You can also Clone an existing Leads by Source report)

Step 1: You should go to New>New Report.
(Or clone a Leads by X report)

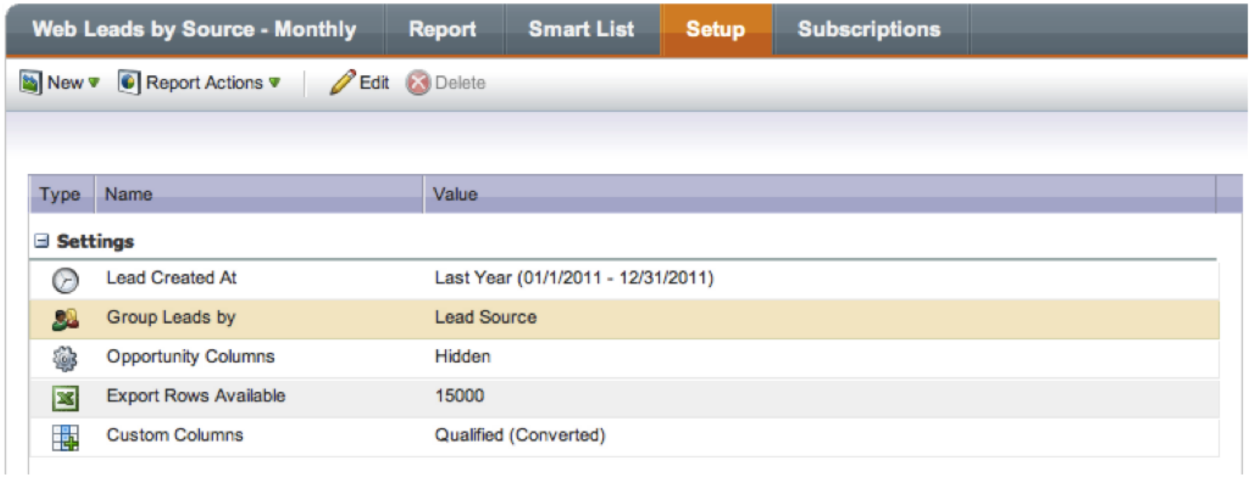


Step 2: Select Lead Performance

Step 3: Name the Report

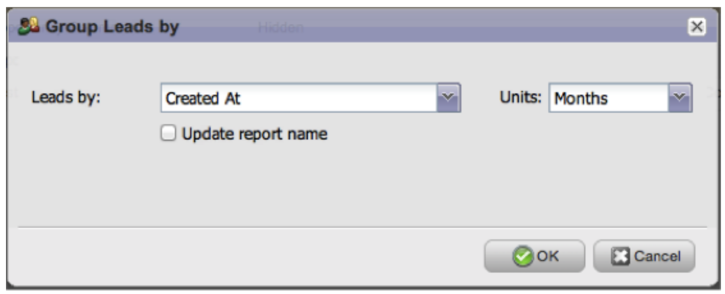
Step 4: Create.

Marketo will now show you the Setup Tab options. This is the best way to adjust the report to meet your needs.



Step 5: Double Click Group by

You can choose any valid Lead attribute and units. Be careful to not update the report name.



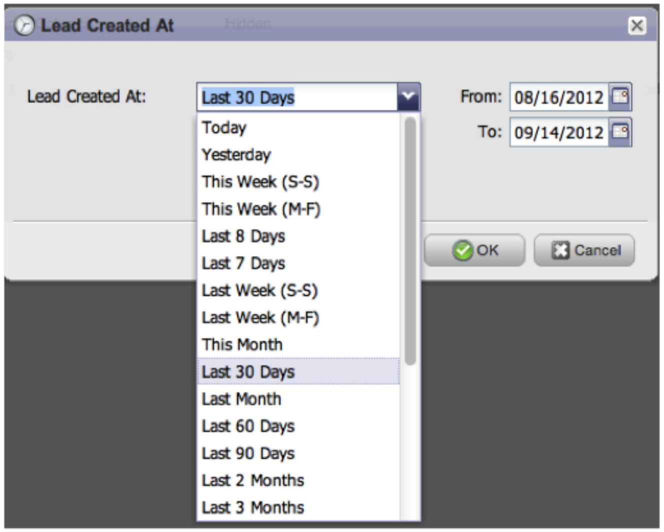
Type of Report You Want	Group by Leads Setting
Leads by Month	Group by Created At [Month/Year]
Leads by Revenue Stage	Group by Revenue Stage *Only if you have filled this in
Leads by Original Search Phrase	Group by Original Search Phrase
Leads by Source	Group by Lead Source
Leads by Status	Group by Lead Status

Starting to get the picture? Good!

Step 6: Choose the Leads to include by Created Date

This is the time frame of when a Lead was originally created in Marketo.

The report will load faster if you select a narrow time range.

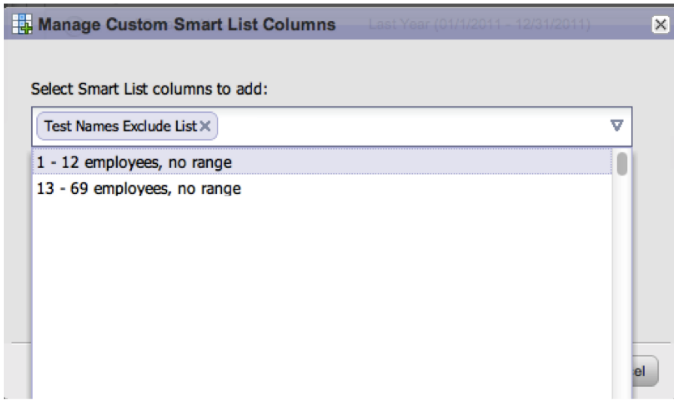


Step 7: Optional: Show Opportunity Columns.

This is necessary if you want to report on opportunity and revenue data. I recommend selecting Shown unless you are only looking for lead counts.

Step 8: Optional: Manage Custom Columns (use a Smart List as a column to show)

This is an optional step if you wish to show specific columns as a sub-set of the Group By rows. Similar to a cross-tab, Custom Columns says "Show me Leads by Source who are also Qualified (Converted)." You may want to calculate AdWords Leads who converted, and this column will show of the Total Leads collected by the report, which ones meet the Smart List Column Criteria.



You must have an existing `Smart List` to include. You can include several `Smart List Columns`.

Note: select a Smart List here *does not* constrain the data involved.

Here is what happens when you select a Smart List to sum as a Column:

Lead Source	Total Leads	Qualified (Co...
Leads by Lead Source		
Website Form	357	18
Web Referral	3,316	102
Web Direct	994	84
Organic - Yahoo	9	1
Organic - Google	669	105
Organic - Bing	25	2
MSN - PPC	34	0
Google AdWords	434	53
	205	25
	478	39
	47	0
AppExchange	96	10
Total:	**6,664**	**439**

Of the Total Leads (6,664) from Last Year who met the Smart List criteria, there are 439 Qualified Leads.

Step 9: Smart List Tab (Optional)

While this is optional, it is recommended you restrict the data brought into the Report. Remember, this is the way to restrict data, which is different than the last step using Custom Columns.

What you do here is up to you. I recommend at least one or two filters so you have a clean report:

Filter 1: `Member of Smart List NOT IN “Test List or Internal Seed List”`

Filter 2: `Is Anonymous = FALSE`

From there, you can then restrict the leads by `Source`, `Visited Web Page`, or any number of filters.

Here's what I did for this example:

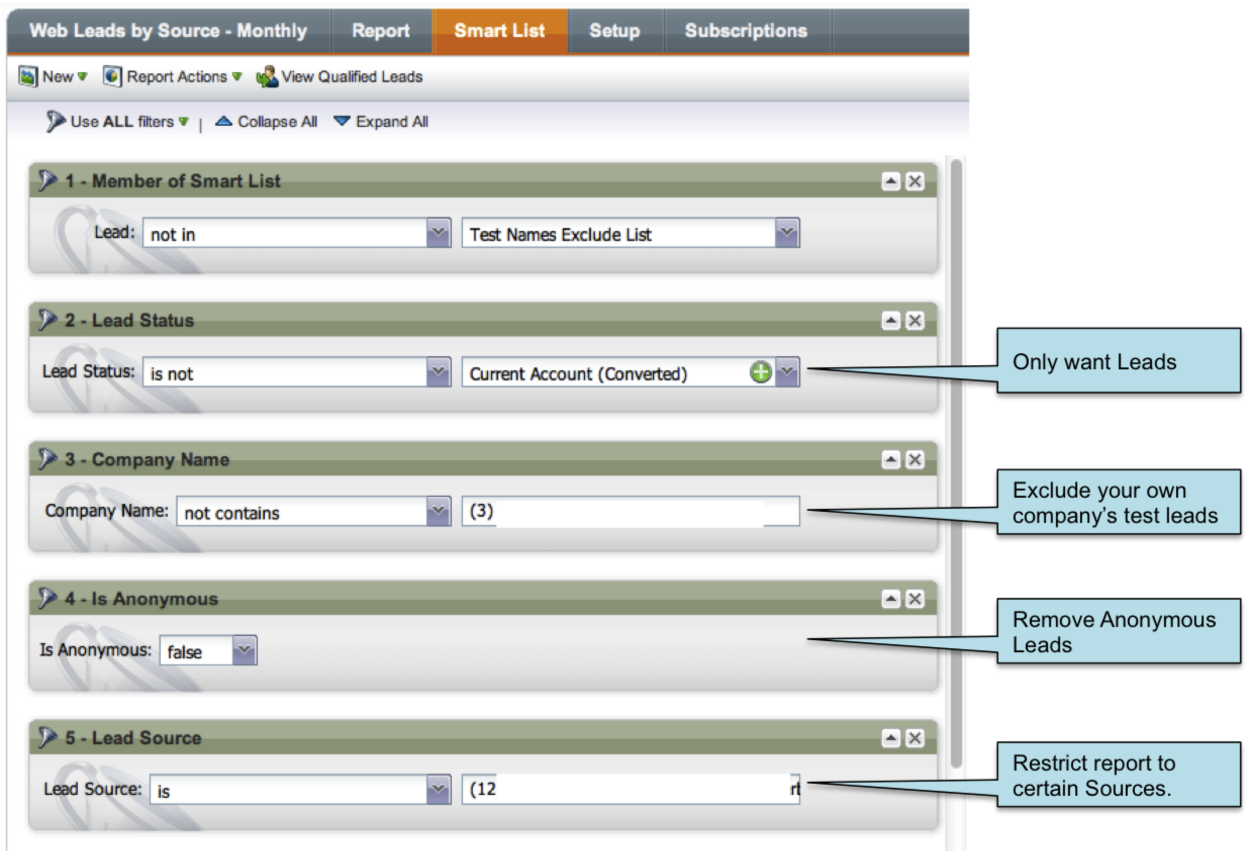
Filter 1: `Member of Smart List NOT IN "Test Names Exclude"` because I still don't want those pesky test@test.com leads.

Filter 2: Lead Status IS NOT "Current Account" because I want to see Leads only.

Filter 3: `Company Name NOT CONTAINS` my company's variations, which is a bit redundant.

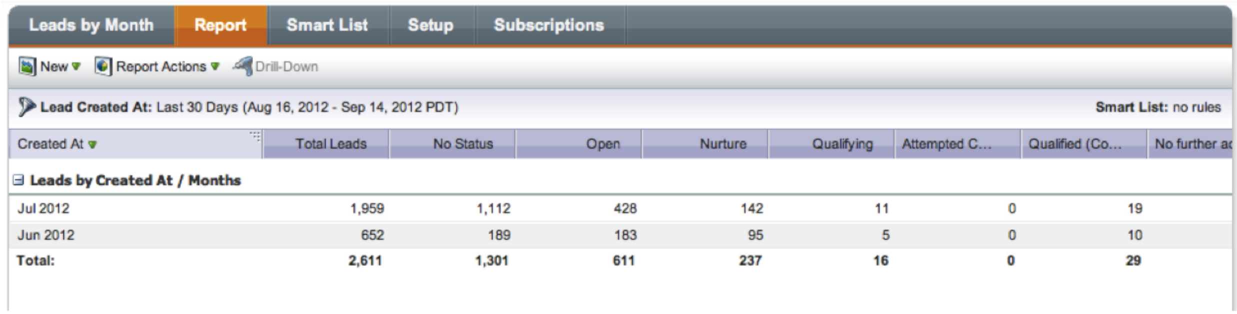
Filter 4: `Is Anonymous = FALSE` because I do not want to bring in Anonymous Leads, which does happen.

Filter 5: `Lead Source IS "[sources relevant to the Web]"`



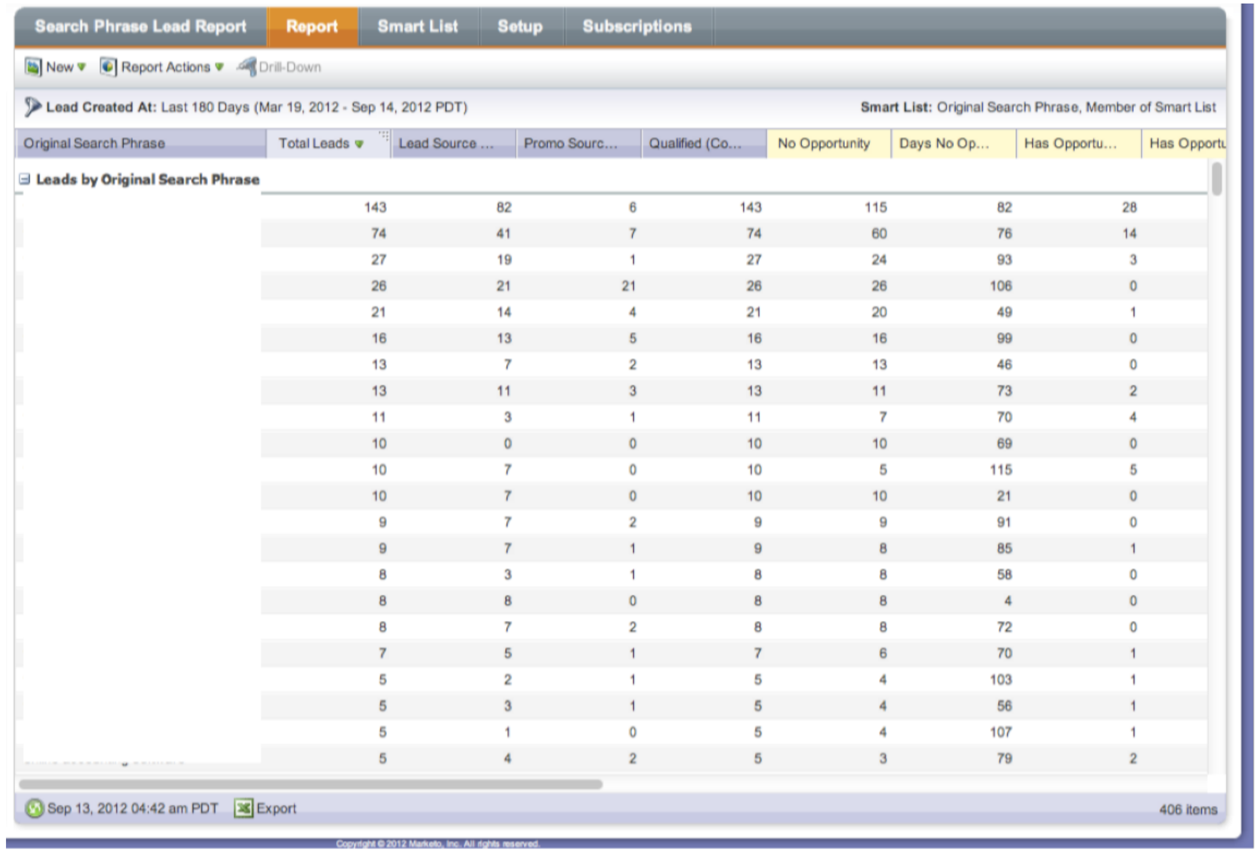
Step 10: Click on Report to run the data.

Here are the outputs from some of the Group by Examples:



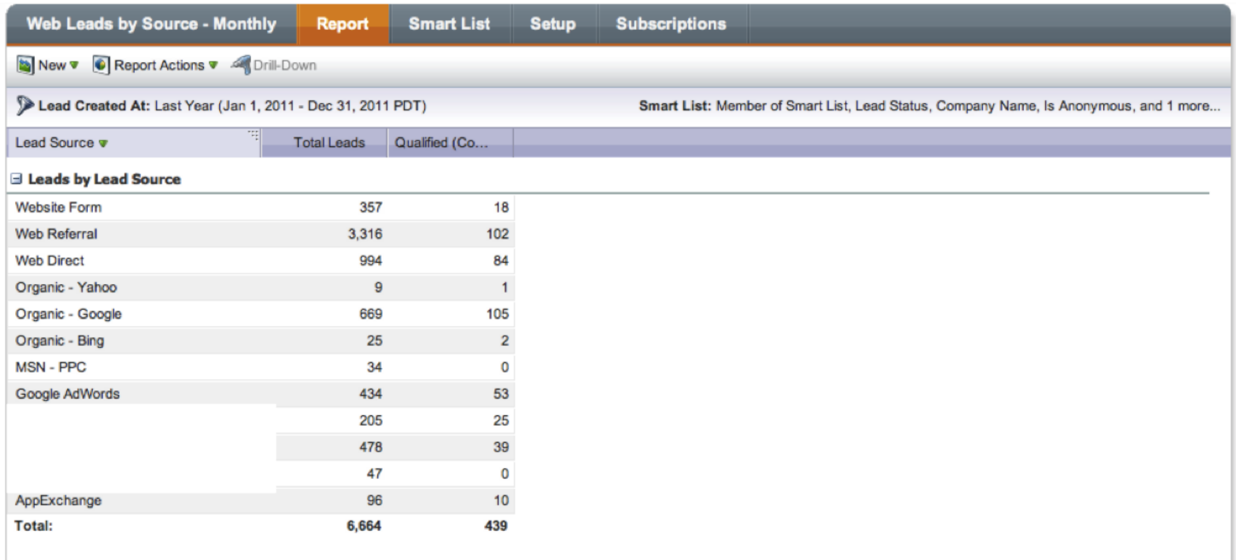
Created At	Total Leads	No Status	Open	Nurture	Qualifying	Attempted C...	Qualified (Co...	No further ac
Jul 2012	1,959	1,112	428	142	11	0	19	
Jun 2012	652	189	183	95	5	0	10	
Total:	**2,611**	**1,301**	**611**	**237**	**16**	**0**	**29**	

Figure 4. Group by Created At Months = Leads by Month



Original Search Phrase	Total Leads	Lead Source ...	Promo Sourc...	Qualified (Co...	No Opportunity	Days No Op...	Has Opportu...	Has Opportu
	143	82	6	143	115	82	28	
	74	41	7	74	60	76	14	
	27	19	1	27	24	93	3	
	26	21	21	26	26	106	0	
	21	14	4	21	20	49	1	
	16	13	5	16	16	99	0	
	13	7	2	13	13	46	0	
	13	11	3	13	11	73	2	
	11	3	1	11	7	70	4	
	10	0	0	10	10	69	0	
	10	7	0	10	5	115	5	
	10	7	0	10	10	21	0	
	9	7	2	9	9	91	0	
	9	7	1	9	8	85	1	
	8	3	1	8	8	58	0	
	8	8	0	8	8	4	0	
	8	7	2	8	8	72	0	
	7	5	1	7	6	70	1	
	5	2	1	5	4	103	1	
	5	3	1	5	4	56	1	
	5	1	0	5	4	107	1	
	5	4	2	5	3	79	2	

Figure 5. Group by Original Search Phrase



Web Leads by Source - Monthly | Report | Smart List | Setup | Subscriptions

New | Report Actions | Drill-Down

Lead Created At: Last Year (Jan 1, 2011 - Dec 31, 2011 PDT) **Smart List:** Member of Smart List, Lead Status, Company Name, Is Anonymous, and 1 more...

Lead Source	Total Leads	Qualified (Co...
Leads by Lead Source		
Website Form	357	18
Web Referral	3,316	102
Web Direct	994	84
Organic - Yahoo	9	1
Organic - Google	669	105
Organic - Bing	25	2
MSN - PPC	34	0
Google AdWords	434	53
	205	25
	478	39
	47	0
AppExchange	96	10
Total:	**6,664**	**439**

Figure 6. Web Leads by Source - Past Year

Great! Now we see that of 6,664 leads from online sources, only 439 converted to a Contact. That's 6.6%. That may be great or it could be down from the prior month. If you bring in `Opportunity Columns`, then you can also see how the funnel extended to Won/Lost.

Lead Drill Down Reports

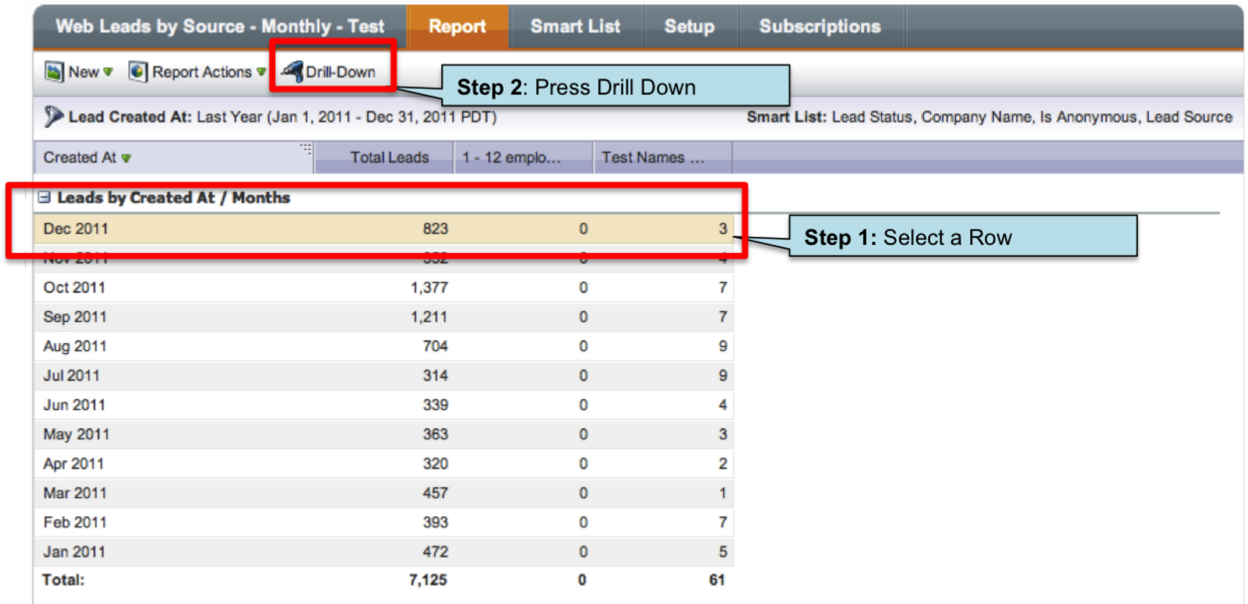
Drill Down is available on Lead Reports only. Marketo does not support matrix or full cross-tab supports without the Revenue Cycle Analytics package. What you can do is "drill down" like you do in Salesforce or a cross-tab. To drill down by one or more rows of data, select the row(s) and press Drill Down.

In this case, we chose Leads by Web Source - Monthly.

Step 1: Select a Row

For example, let's find out more about the current Lead Status for Web Leads from December 2011.

Note: you can select only one row to drill down on.

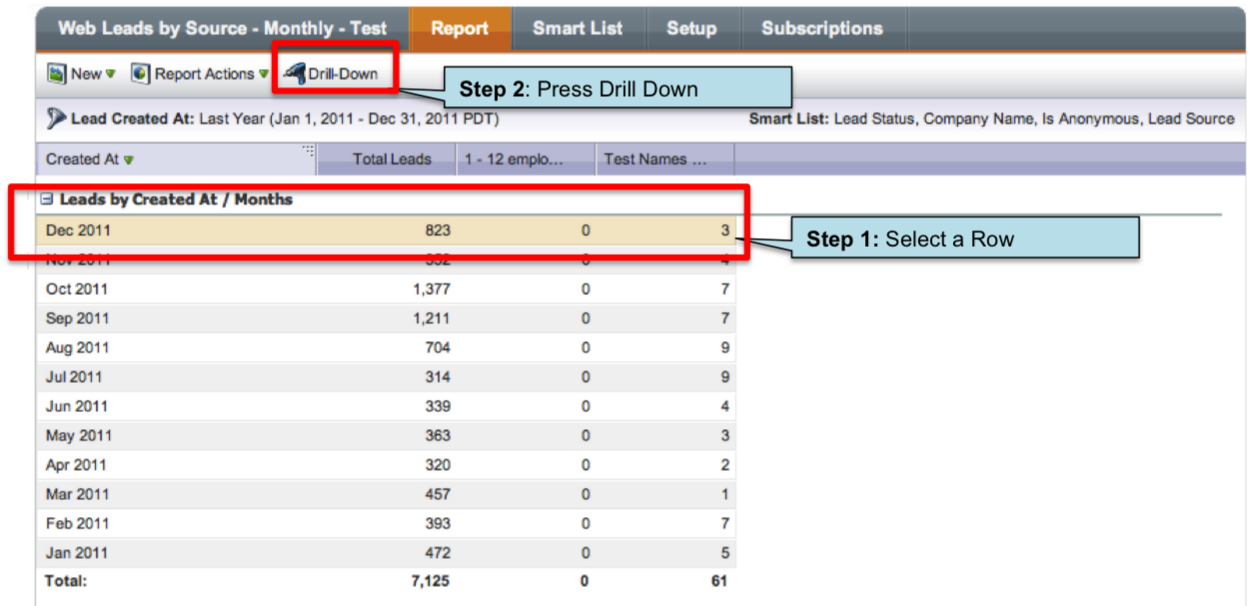


Step 2: Drill Down Field Select

Select `Lead Status`. Press OK.

Step 3: Review Report

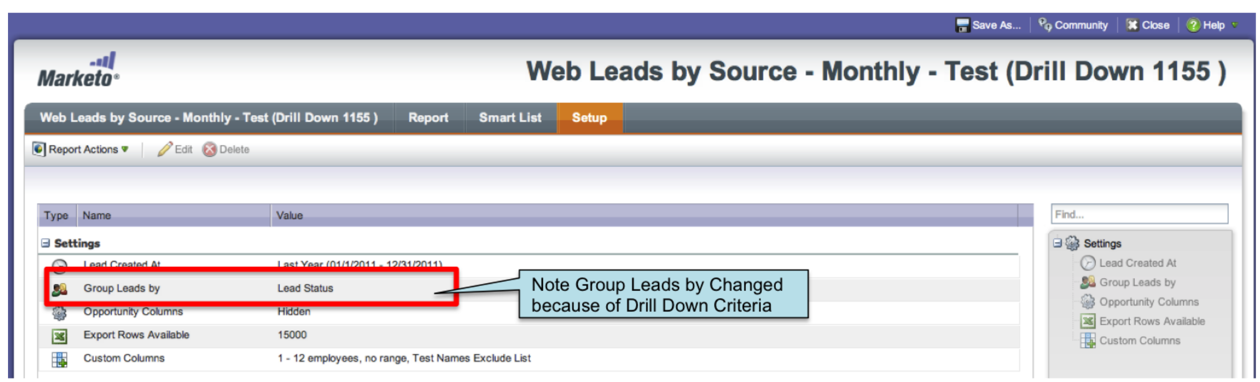
A new window will appear with data focused on the Lead Source values you selected. This is an entirely new report that you can further modify and Save As.



Step 4: Optional Drill Down Further

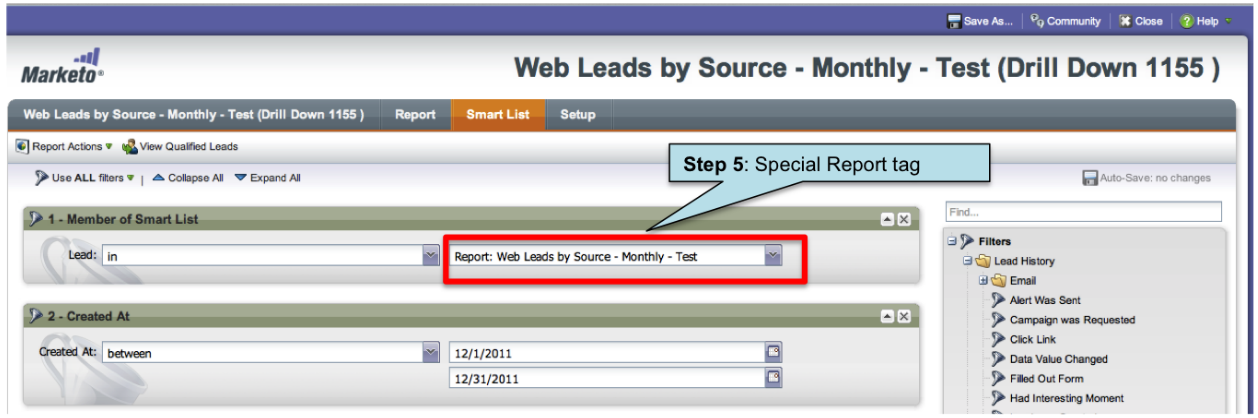
Select a new row to `Drill Down` further.

You can also adjust the Setup to change the `Group By` setting to a different drill down field.



Step 5: Optional: Smart List

If you want, you can adjust the data again using the Smart List. Note that we can refer to Reports as `Member of Smart List IN Report:` [Report Name]



Step 6: Save As

If you want to refer back to this report, `Save As` in the upper right corner to save your report.

Pages Visited by Groups of Leads

Let’s say you wanted to see if your Customers are visiting your site. You cannot do this directly using Landing Page reports. You must either create a Smart List or a Leads by X report.

Step 1: Clone or Create a New Landing Page Performance Report.

Step 2: Smart List Filters

Use filters like the following to bring in Customers who Visited X Page.

`Member of Smart List IN “Customer List”`

`Member of List IN “Customer List”`

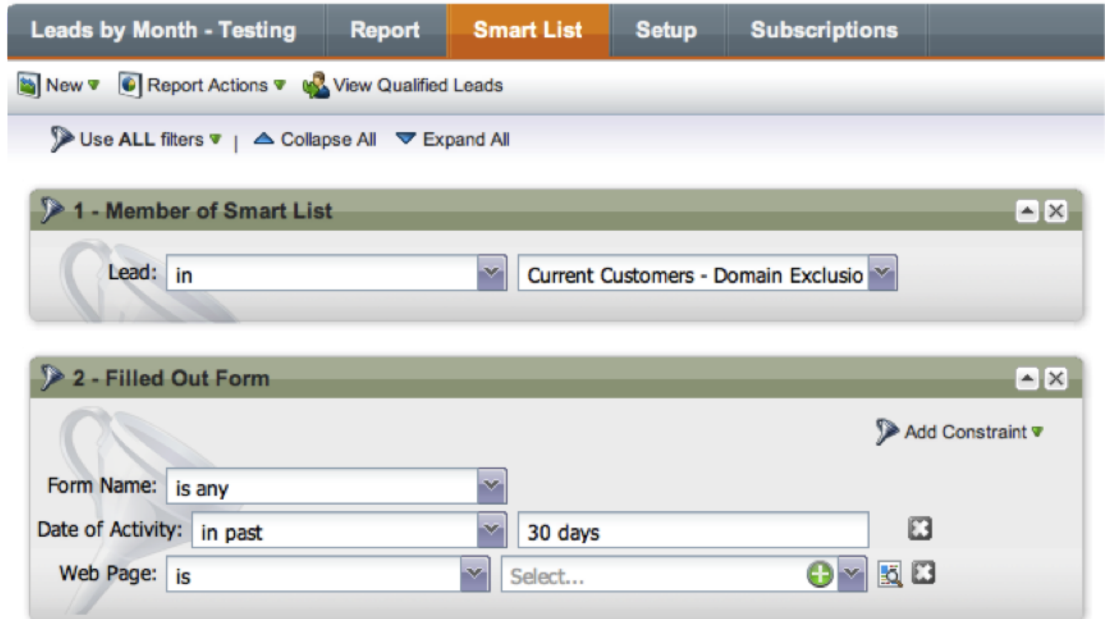
`Filled Out Form IS ANY` [or particular form]

`Date of Activity IN PAST [XX]` Days [NOTE: this is the web page activity, not Lead Created At]

`Web Page IS` [select pages]

`Visited Web Page IS/CONTAINS` [Page Name or URL like “www.mycompany/demo”]

For example:



Step 3: Run Report

The `Lead Report` will now show a list of leads who are in the Current Customers group who `Filled Out any form` in the past 30 days on X Pages.

Of course, this will show you the Conversion Count for that group and page combination.

If you want to see a list of `Visited Web Page` and the Conversion Count, make the above example a Smart List to be used as a Custom Column. Then, constrain the Report's Smart List by `Visited Web Page is X.`

Leads by Status [default]

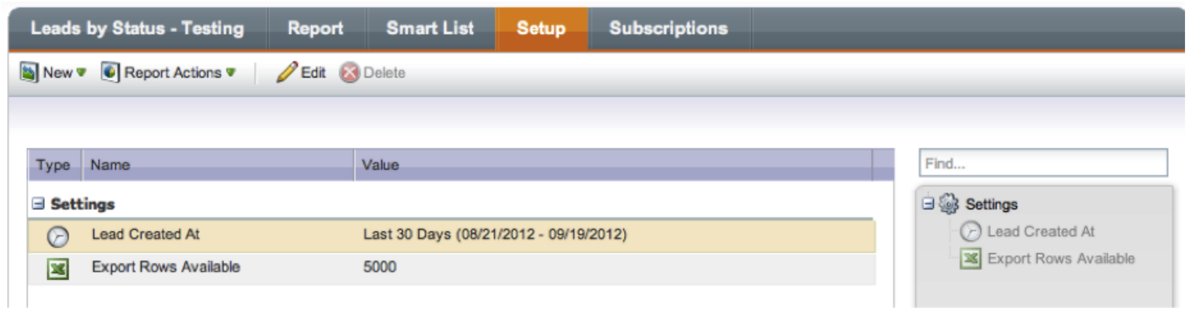
This is a special report that must be cloned or created New.

Step 1: Clone the existing Leads by Status or Create New

Step 2: Click on Setup Tab

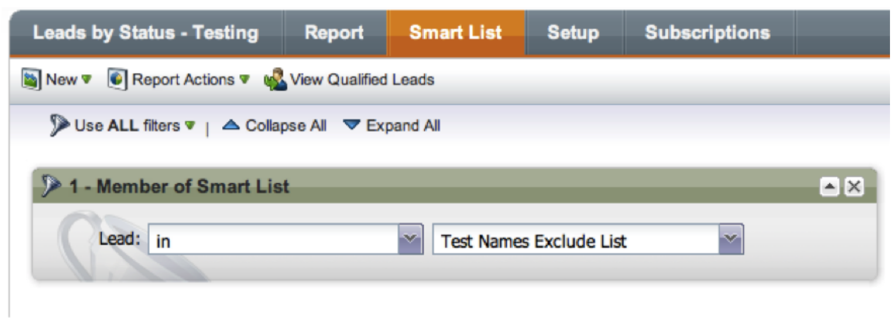
Step 3: Adjust Lead Created At Time Range

This report only permits the lead created time frame.



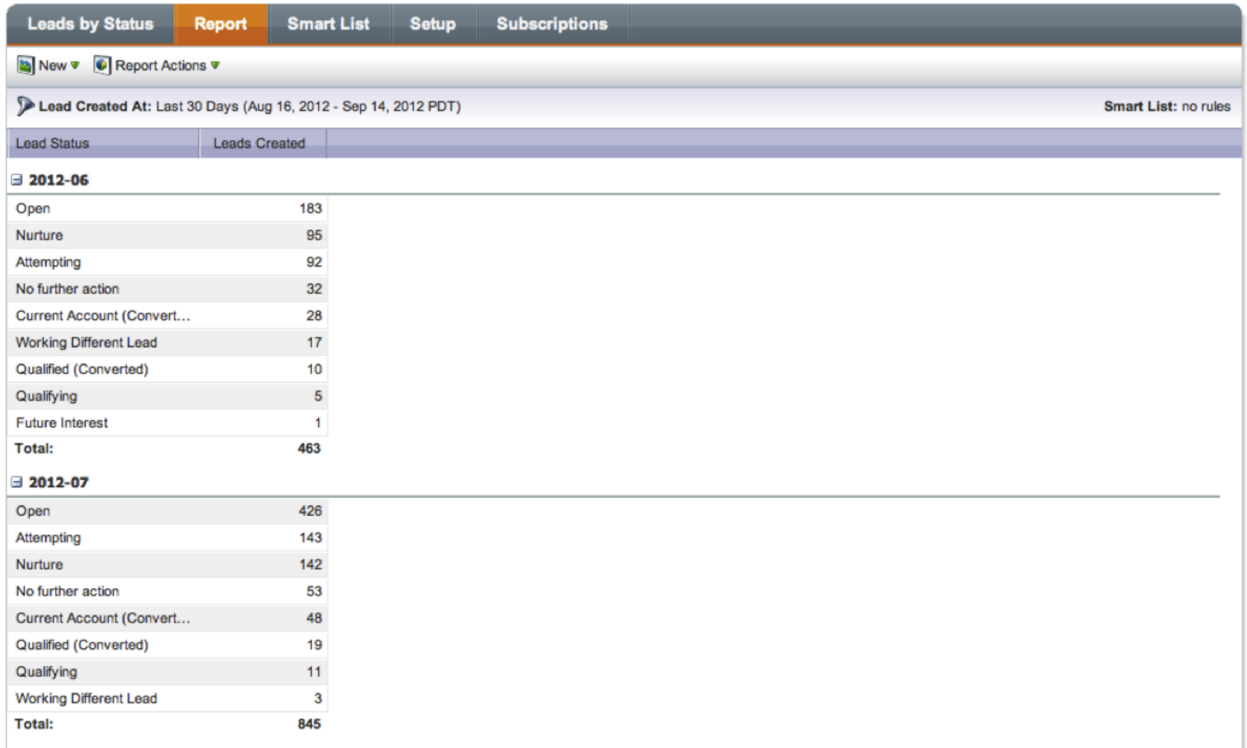
Step 4: Click on Smart List

You can now constrain the report. In this case, we will exclude Test Leads because they don't count toward our funnel numbers. You could also constrain by Leads who were part of a Program(s), visited a Page, or responded to an offer with Filled Out Form on Page X.



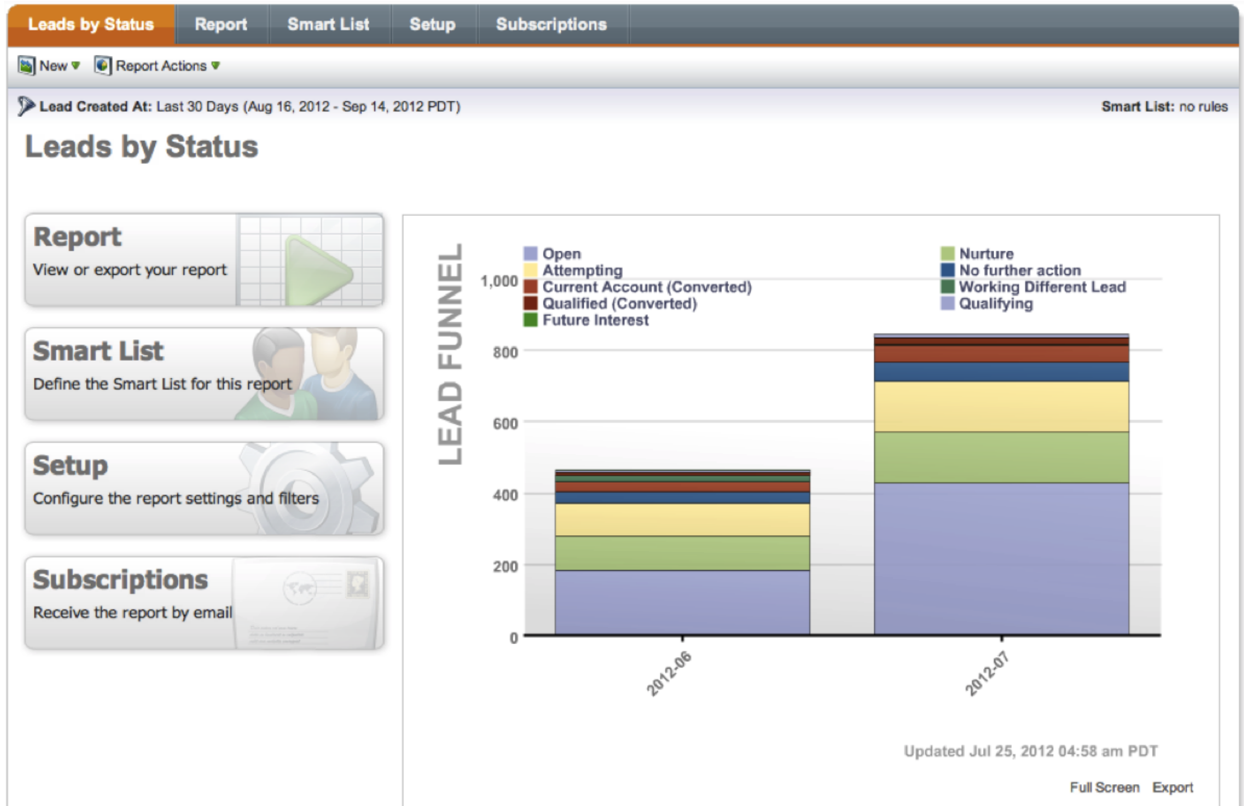
Step 5: Click on Report to Run Report

The Leads by Status report is special because Marketo automatically groups Leads by Year and then by Status.



Lead Status	Leads Created
2012-06	
Open	183
Nurture	95
Attempting	92
No further action	32
Current Account (Convert...	28
Working Different Lead	17
Qualified (Converted)	10
Qualifying	5
Future Interest	1
Total:	**463**
2012-07	
Open	426
Attempting	143
Nurture	142
No further action	53
Current Account (Convert...	48
Qualified (Converted)	19
Qualifying	11
Working Different Lead	3
Total:	**845**

There are no other options on this report.



Leads by Campaign Reports

This special report groups Leads by smart campaign membership.

Step 1: Clone the existing Leads by Campaign
(Or create a New Leads by Campaign Report)

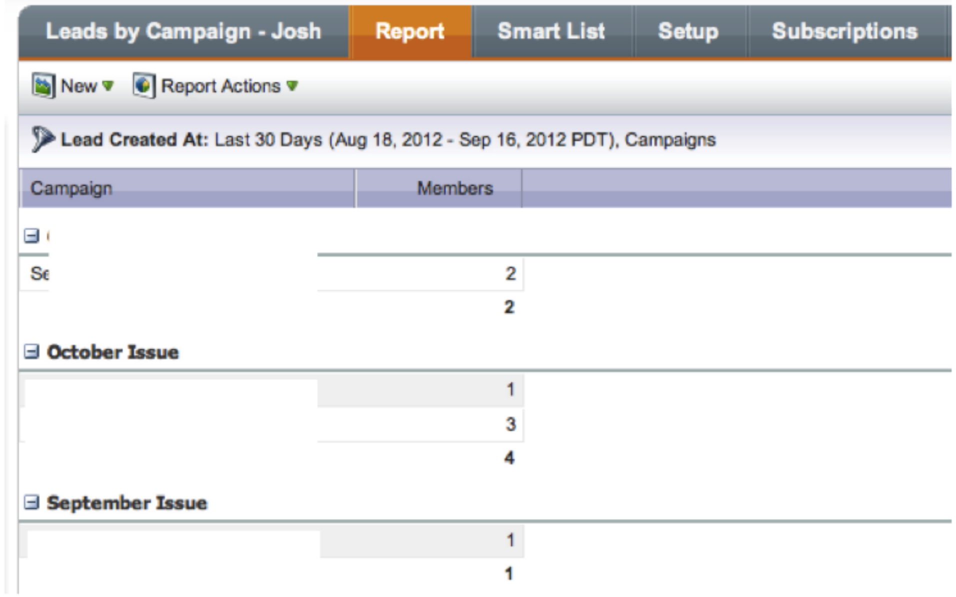
Step 2: Click on Setup

Step 3: Adjust Lead Created At

Step 4: Select Campaigns Using the Campaign Filter

Step 5: Click on Smart List

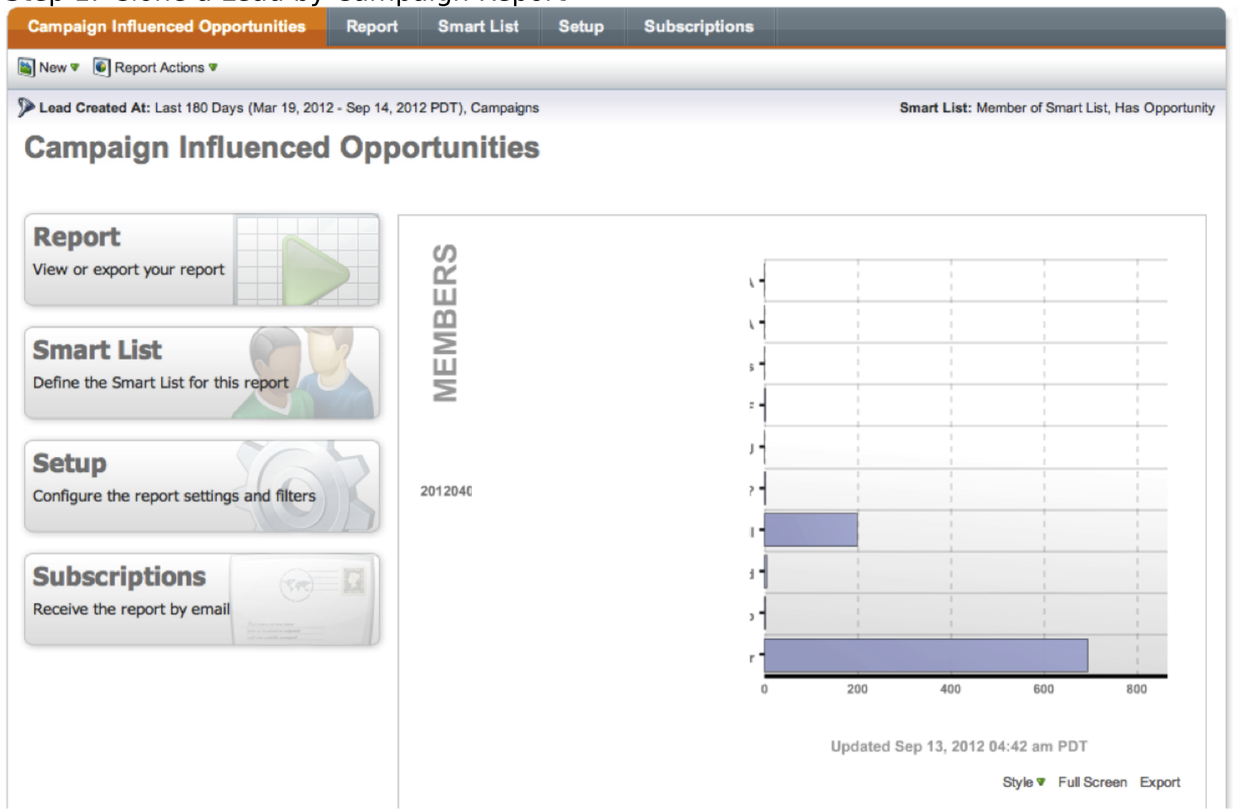
Step 6: Run the Report



Leads in multiple campaigns will be counted in each campaign row.

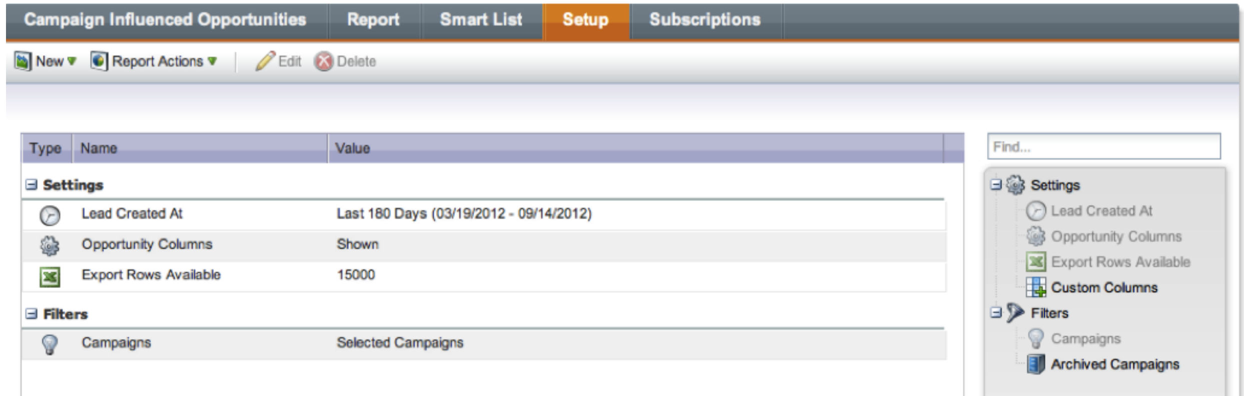
Campaign Influence Reports without RCA!

Step 1: Clone a Lead by Campaign Report



Step 2: Setup

Think about what you want this report to show. Is it on Webinar campaigns? All campaigns? Nurturing? Just campaigns from a single year?



Step 3: Change Leads Created At:

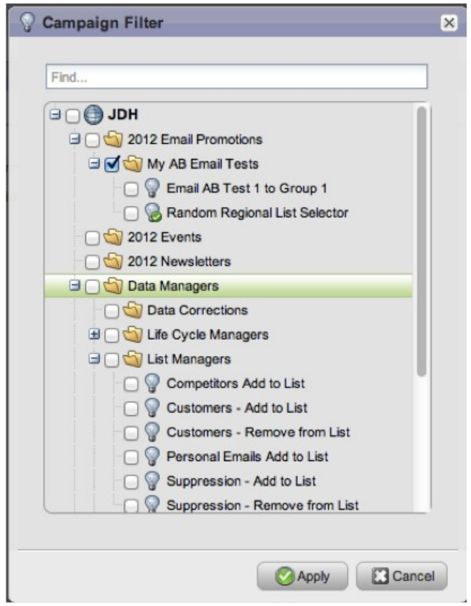
Choose the time frame of when the leads were created. Remember if you restrict this to `Last 90 Days`, then even if you show All Campaigns, Marketo will report only on `Leads Created in the Past 90 Days` who are members of All Campaigns.

Step 4: Opps: Hidden or Shown…up to you

If you are running a channel review, the `Program Report` may work better for you. But if this report is more about revenue and lead count, then Show Opportunities.

Step 5: Campaigns to Include (optional)

Again, up to you. If you followed my earlier advice to name and structure `Marketing Activities` by Date, Channel, or Region, it should be fairly easy to select the desired Campaigns.

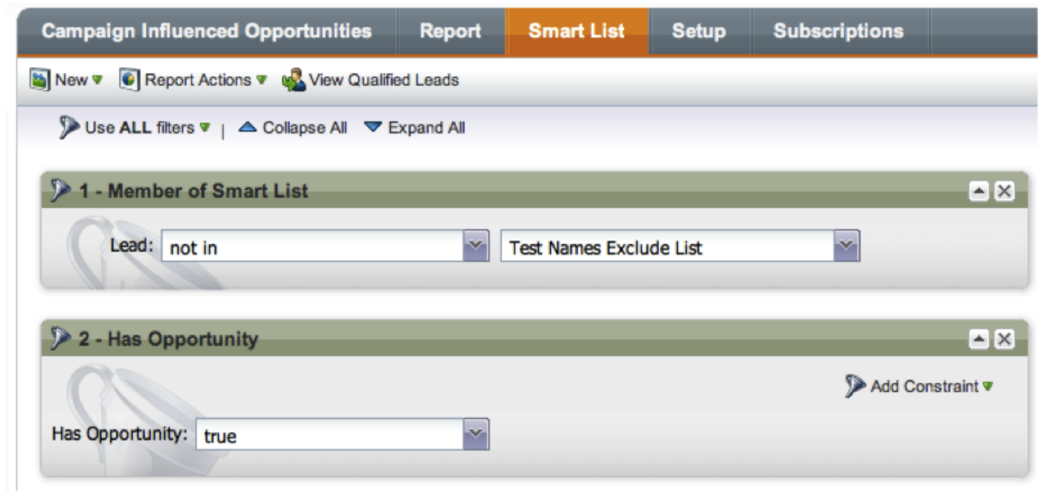


Step 6: Smart List

Choose the desired filters to include or exclude Leads. A good choice here is

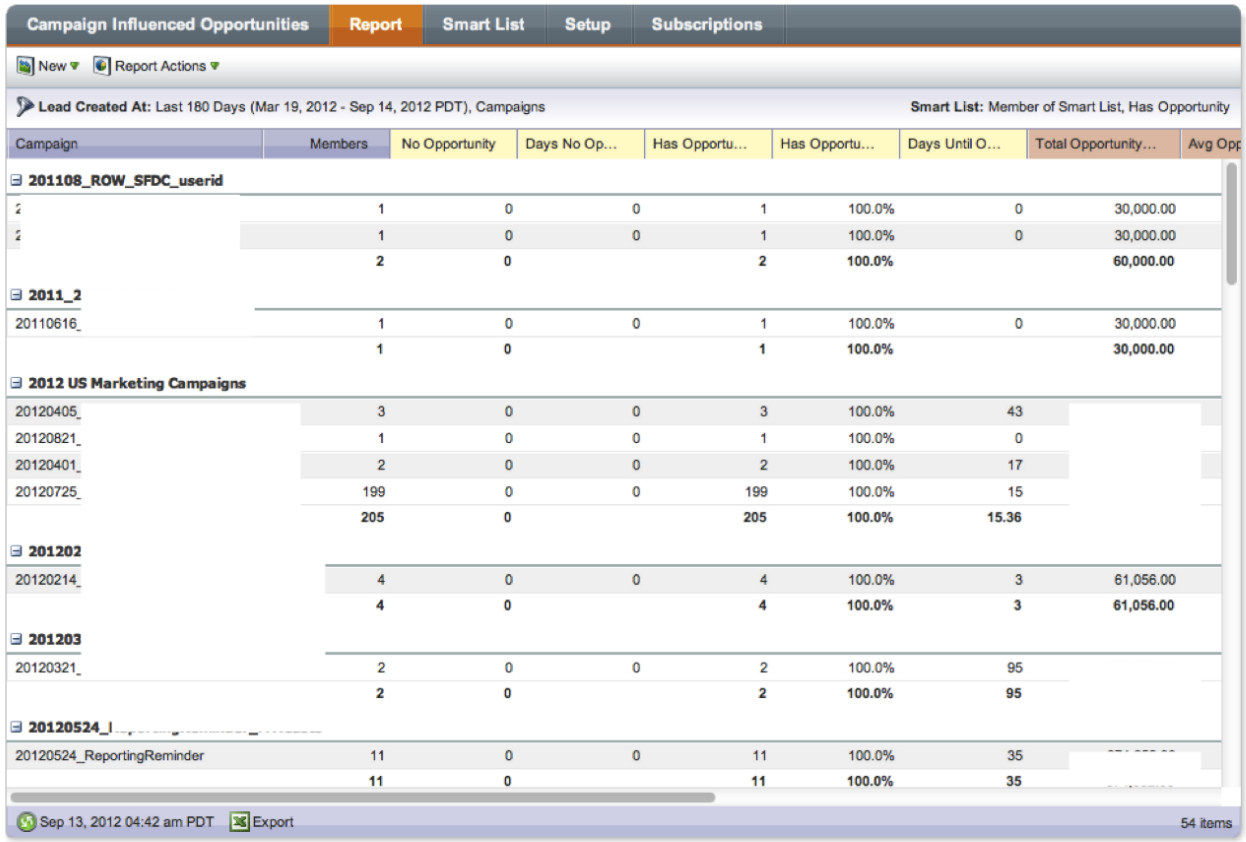
Filter 1: `Member of Smart List NOT IN "Test Leads"`

Filter 2: `Has Opportunity = TRUE` since we are concerned with leads with Opps.



Step 7: Run Report

This is a slick report showing how well each campaign performed. Since we included only Lead with Opps, the first two Opportunity columns show zero.



Campaign	Members	No Opportunity	Days No Op...	Has Opportu...	Has Opportu...	Days Until O...	Total Opportunity...	Avg Opp
201108_ROW_SFDC_userid								
2	1	0	0	1	100.0%	0	30,000.00	
2	1	0	0	1	100.0%	0	30,000.00	
	2	**0**		**2**	**100.0%**		**60,000.00**	
2011_2								
20110616_	1	0	0	1	100.0%	0	30,000.00	
	1	**0**		**1**	**100.0%**		**30,000.00**	
2012 US Marketing Campaigns								
20120405_	3	0	0	3	100.0%	43		
20120821_	1	0	0	1	100.0%	0		
20120401_	2	0	0	2	100.0%	17		
20120725_	199	0	0	199	100.0%	15		
	205	**0**		**205**	**100.0%**	**15.36**		
201202								
20120214_	4	0	0	4	100.0%	3	61,056.00	
	4	**0**		**4**	**100.0%**	**3**	**61,056.00**	
201203								
20120321_	2	0	0	2	100.0%	95		
	2	**0**		**2**	**100.0%**	**95**		
20120524_I								
20120524_ReportingReminder	11	0	0	11	100.0%	35		
	11	**0**		**11**	**100.0%**	**35**		

The Leads by Campaign Report does not permit drill downs.

Webinar Reports (using Leads by Campaign)

Using the previous Steps, you can select either `Webinar Programs` using the `Campaign Filter` or use `Member of Program` filter for the Smart List to report on Webinar data in the aggregate.

I recommend standard naming of your webinars to facilitate building this report.

Leads by Campaign Folder

Grouped by the folder in the Marketing Activities tree depending on your selection. Each campaign or program underneath the selection is counted toward the report. Leads in multiple campaigns will be counted in each campaign row.

This report may be useful as a quick way to check on multiple campaigns at once. There are few Setup options and it may be better to use the Leads by Campaign Report instead.

Step 1: Clone or Create a Leads by Campaign Folder report

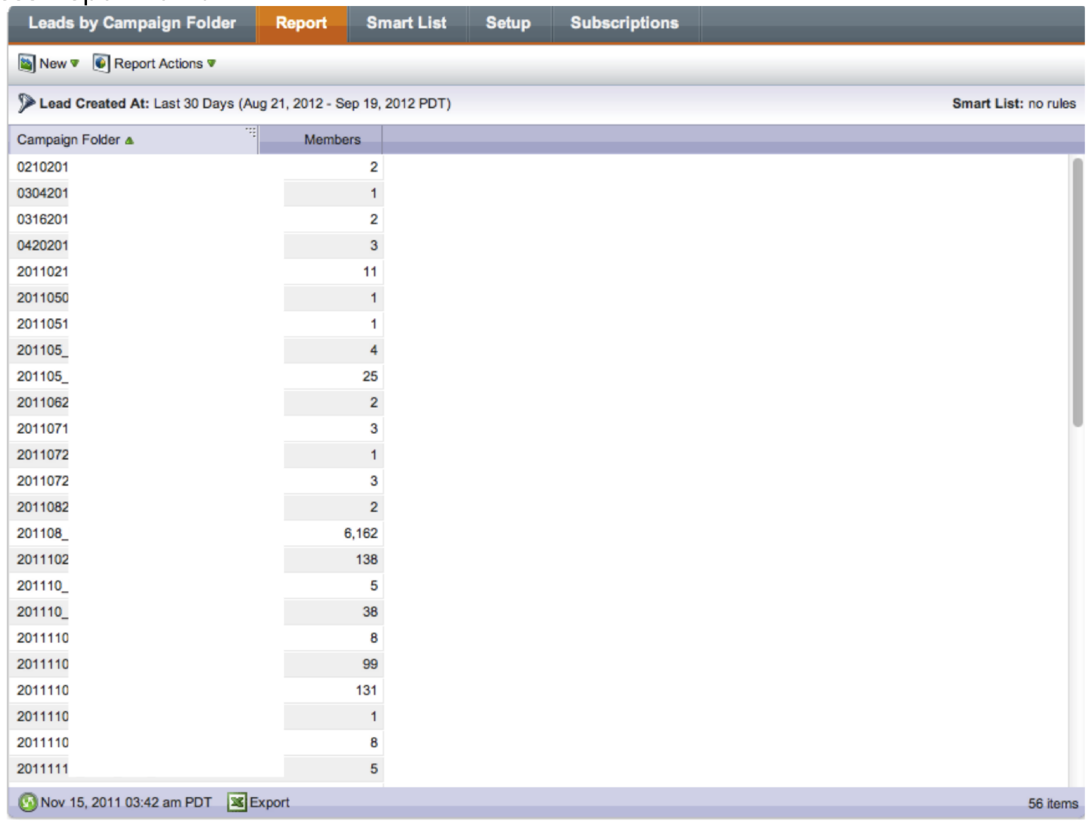
Step 2: Click on Setup

You can only change the `Leads Created At` or `Custom Column` settings

Step 3: Click on Smart List

If you want to restrict the totals to particular groups, do so now.

Step 4: Press Report to Run.



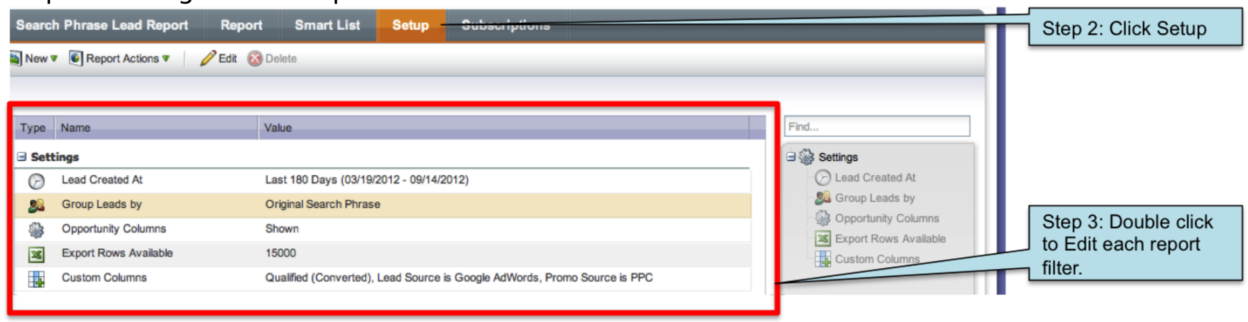
Campaign Folder	Members
0210201	2
0304201	1
0316201	2
0420201	3
2011021	11
2011050	1
2011051	1
201105_	4
201105_	25
2011062	2
2011071	3
2011072	1
2011072	3
2011082	2
201108_	6,162
2011102	138
201110_	5
201110_	38
2011110	8
2011110	99
2011110	131
2011110	1
2011110	8
2011111	5

Leads by Original Search Phrase

Understanding what search phrases your Leads use to find you is a valuable tool in your SEO and SEM efforts. You may also find value in this data as it can better inform your copy decisions on emails and landing pages. Here's how to setup this valuable report.

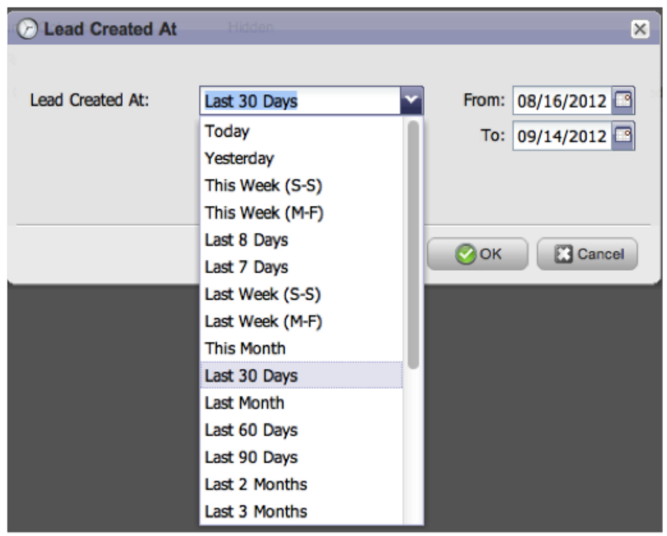
Step 1: Clone the Leads by Source Report

Step 2: Change the Setup



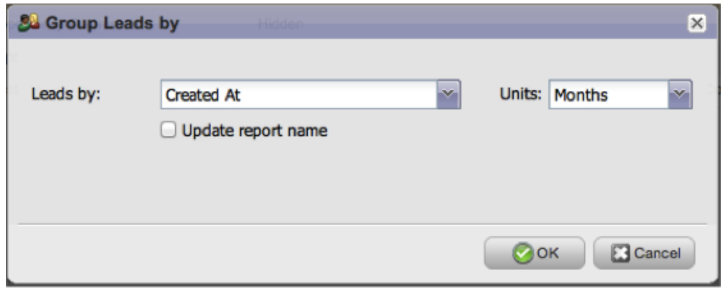
Step 3: Leads Created At

Change this to the desired time range for `Leads Created` for a certain time range. This is based on the Marketo Lead Created timestamp. For leads imported originally from SFDC, they will all have this timestamp too.



Step 4: Group Leads by Original Search Phrase

Adjust this to show the correct field. Again, this can be any field, but in this case we want `Original Search Phrase`.

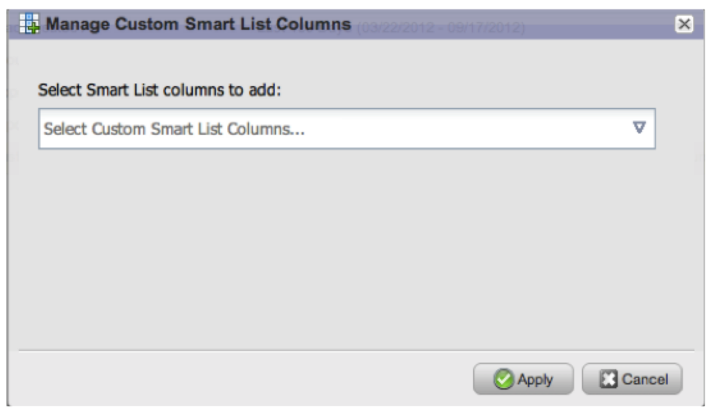


Step 5: Opportunity Columns=Shown

You should show this on this report to see how each Phrase is contributing to revenue. Then you can prune spending on poor performing phrases in AdWords.

Step 6: Custom Columns

To complete this step, you must have an existing Smart List that will group leads in a column by row. For instance, if you want to show `Original Search Phrase` by Customer Count and compare that to Total Leads, just create the Smart List, and then add it to the `Custom Columns` list.



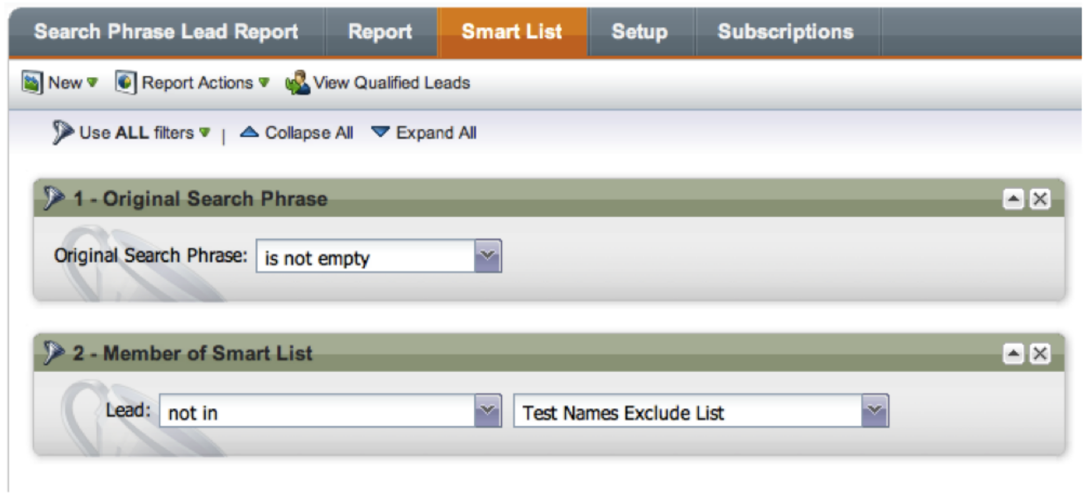
In the example here, I provided additional groupings by Converted and Lead Source values.

Step 7: Smart List

My recommendation is to filter all Lead reports using a Smart List filter, which includes a `Suppression List.` For instance, in this case, I am *excluding* the Test leads we use in the database because they should never appear in a report provided to management.

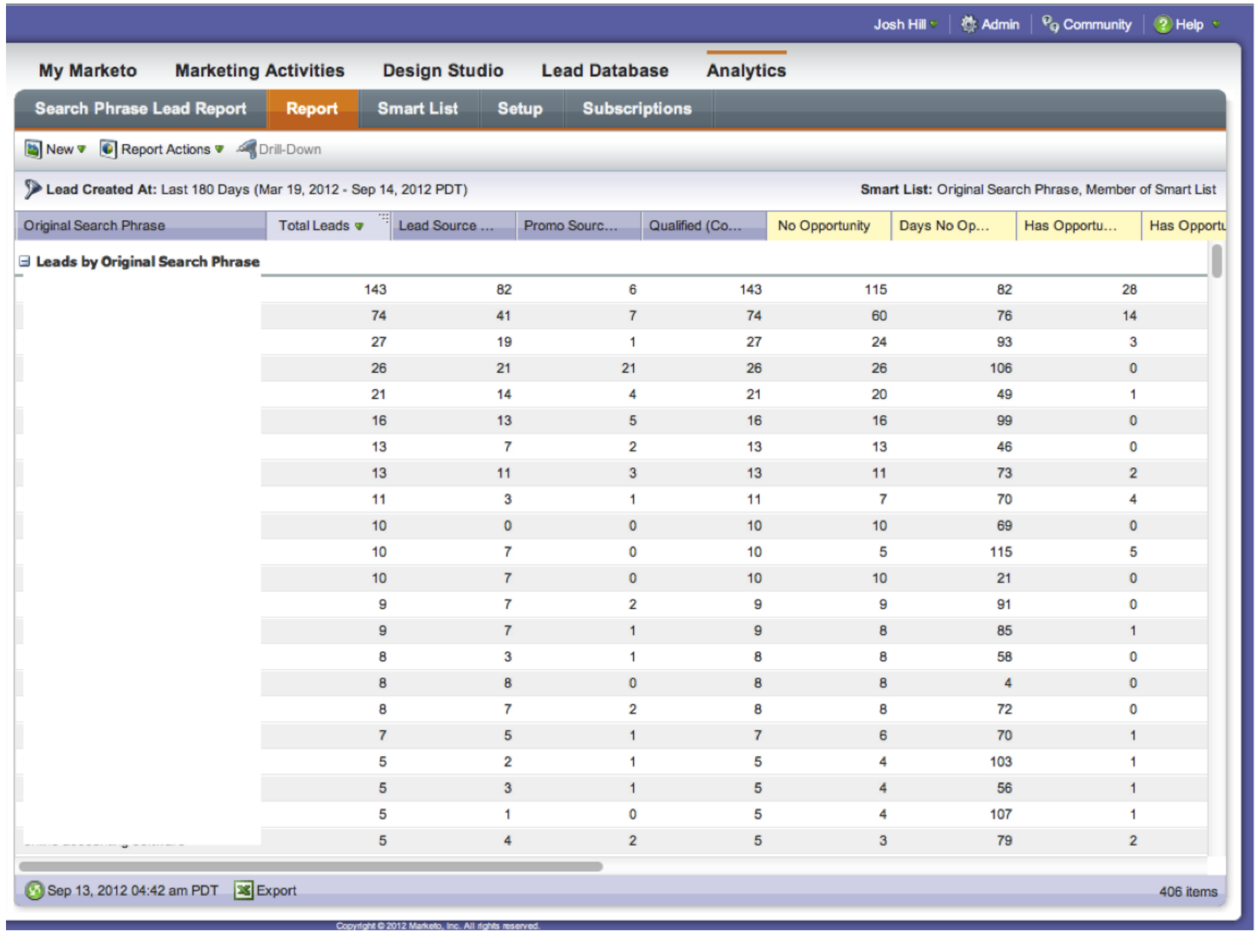
Filter 1: `Original Search Phrase IS NOT EMPTY` because blanks are not what we want to view. Leave this filter out if you want the count for "Blank" Original Search Phrase.

Filter 2: `Member of Smart List NOT IN "Test Names Exclude List"`



Step 8: Run Report

Awesome. Now you have a slick looking report showing which Search Phrases are bringing in the most Leads, Opps, and Revenue. Great work!



Original Search Phrase	Total Leads	Lead Source ...	Promo Sourc...	Qualified (Co...	No Opportunity	Days No Op...	Has Opportu...	Has Opportu
	143	82	6	143	115	82	28	
	74	41	7	74	60	76	14	
	27	19	1	27	24	93	3	
	26	21	21	26	26	106	0	
	21	14	4	21	20	49	1	
	16	13	5	16	16	99	0	
	13	7	2	13	13	46	0	
	13	11	3	13	11	73	2	
	11	3	1	11	7	70	4	
	10	0	0	10	10	69	0	
	10	7	0	10	5	115	5	
	10	7	0	10	10	21	0	
	9	7	2	9	9	91	0	
	9	7	1	9	8	85	1	
	8	3	1	8	8	58	0	
	8	8	0	8	8	4	0	
	8	7	2	8	8	72	0	
	7	5	1	7	6	70	1	
	5	2	1	5	4	103	1	
	5	3	1	5	4	56	1	
	5	1	0	5	4	107	1	
	5	4	2	5	3	79	2	

Step 9: Drill Down (optional)

The `Drill Down` button allows you to select one or more rows in certain Lead Reports, then ask Marketo to look at these rows by a new constraint. We'll talk more about that below.

Step 10: Subscription to Your Web/SEO Manager (Optional)

Remember to setup a weekly email for your SEO Manager or Agency so they can help you perform better. If you do send data to an outside firm, consider creating a separate report and remove certain Columns.

Email Report Customization

There are two email reports and only two use cases:

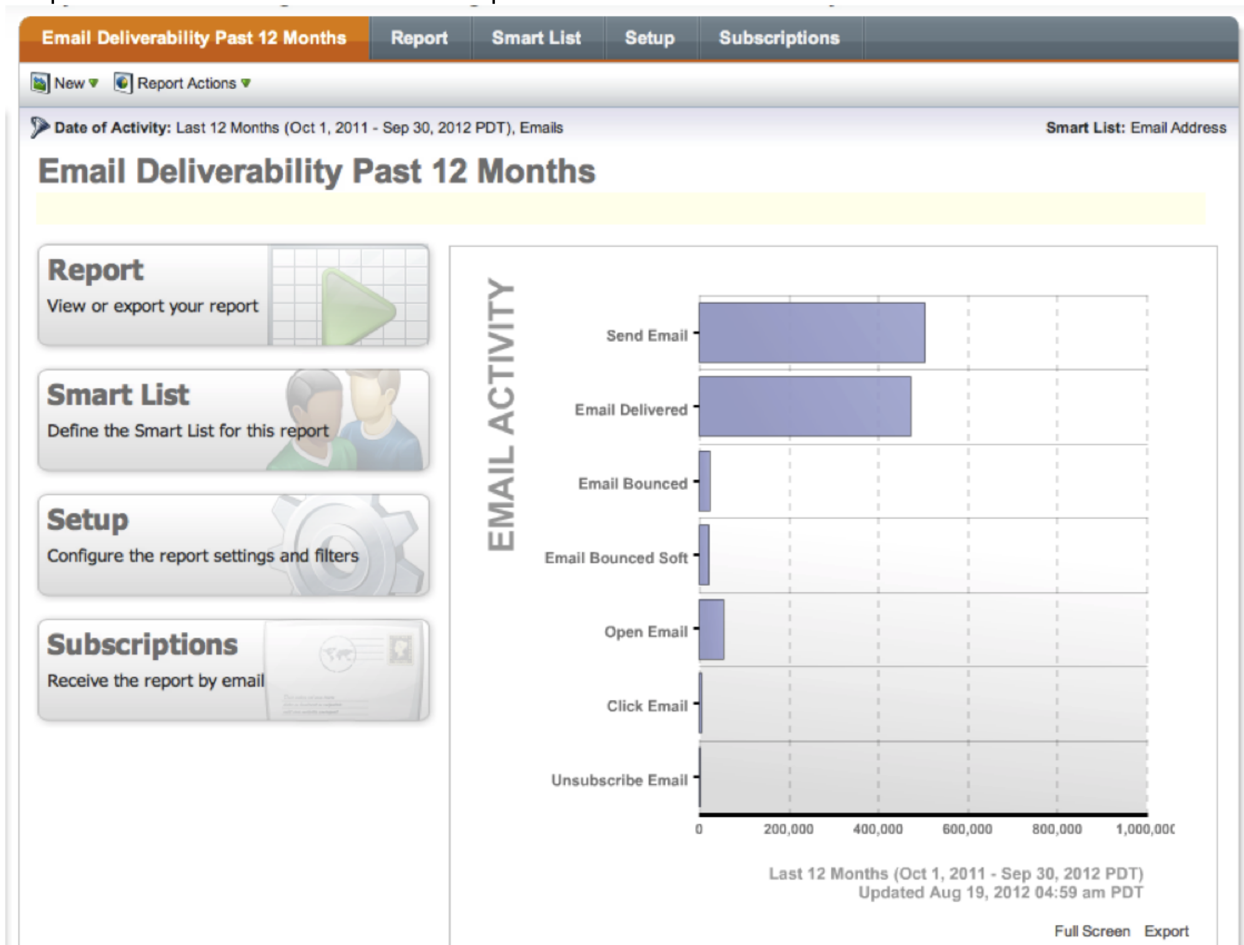
- Email Performance by Type of Email (such as a Program or Campaign, or a webinar)
- Email Performance for Email Deliverability

In either case, the steps are very similar. Be sure to name your reports something like

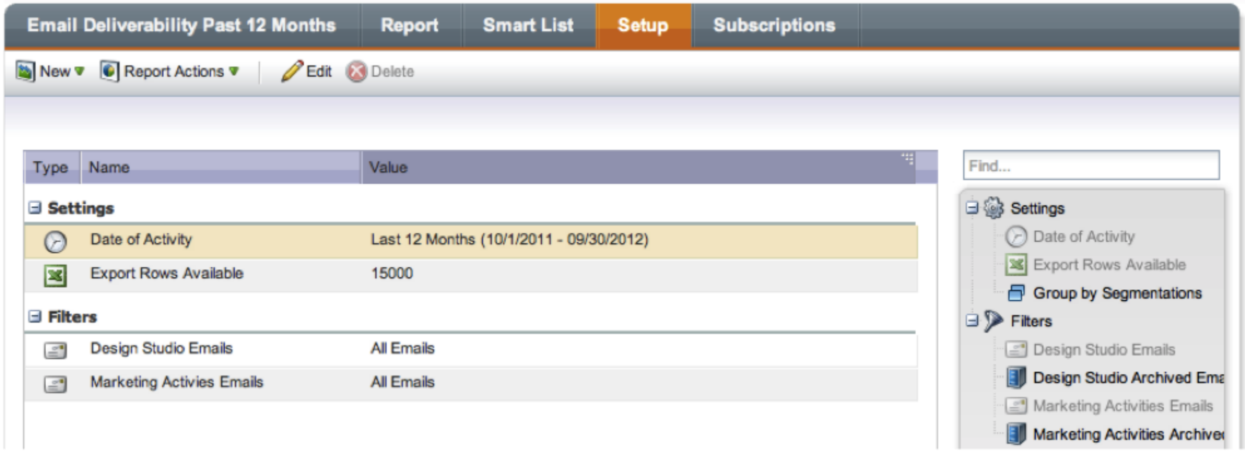
- Email Deliverability – Past 12 Months
- Email Deliverability – Webinars – Past 90 Days

As I mentioned in the chapter on Email Reputation Management, watching your Email Performance report is a critical step to maintaining a high Sender Score. Here's how to build a standard report over time.

Step 1: Clone Email Performance Report



Step 2: Click on the Setup Tab



Step 3: Date of Activity: Email Activity

Remember, this is the date range of email activity, not necessarily the day it was sent.

Step 4: Choose the Emails

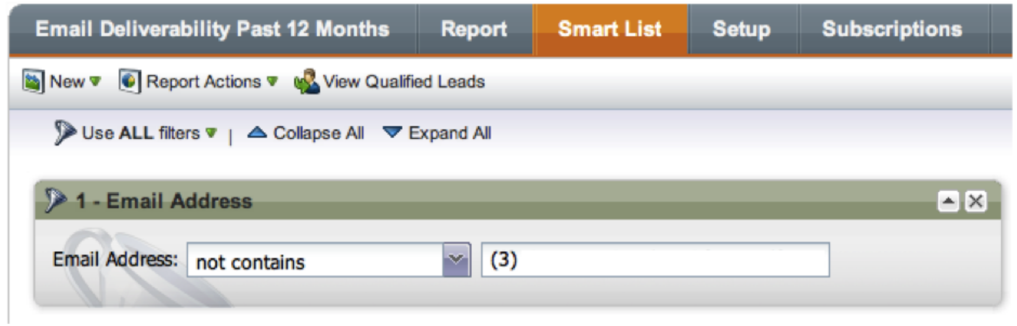
You should select the Folders or Programs where your Emails reside. If you setup your naming and organization correctly, this should as simple as selecting Webinars 2012.

If you select All Emails, then you can use the Smart List to constrain the report by Member of List to constrain the report to Webinar Invitations List, or another filter.

If your emails are structured well, you can also select the appropriate folders, campaigns, or programs in this dialog. In this example, we will select All Emails.

Step 5: Smart List

Filter 1: `Member of Smart List NOT IN "Test Leads Exclude"` because I still don't want those polluting my data.

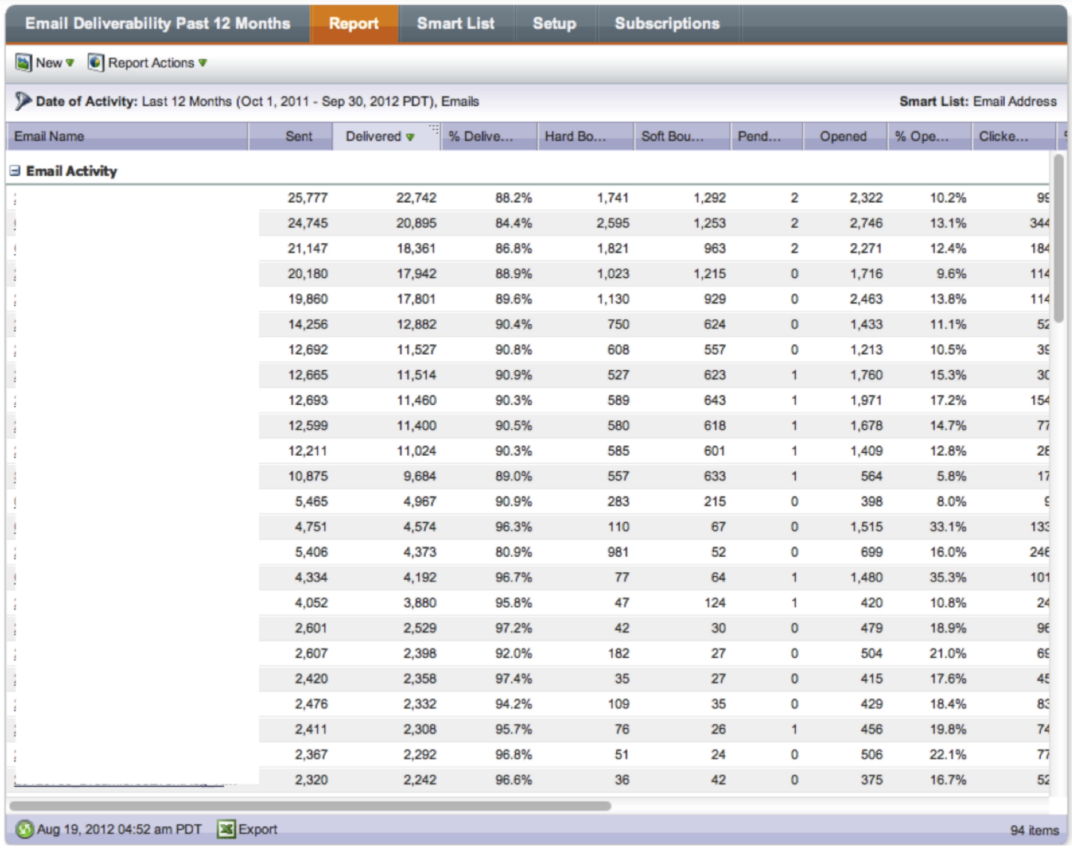


Other filters might be to restrict the list to a certain Group, such as a list of trade show leads.

Step 6: Run the Report

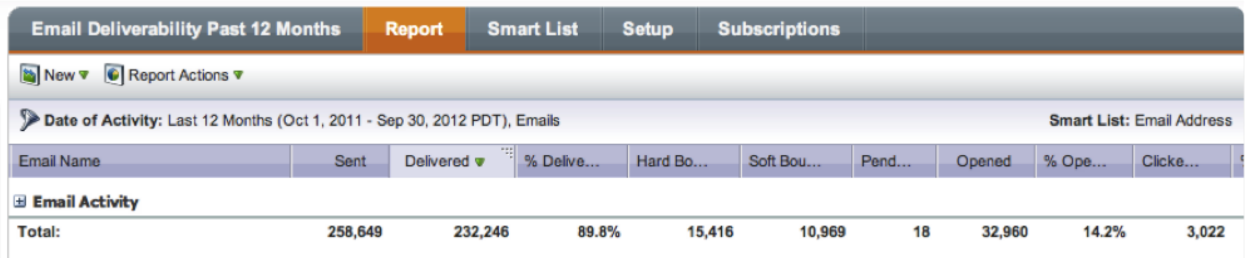
When you run this report, you may get a long list of emails with data for all of them. Be sure to scroll to the right to see Unsubscribes and other key details.

Note: see Email Reputation Management on how to interpret this report.



Email Name	Sent	Delivered	% Delive...	Hard Bo...	Soft Bou...	Pend...	Opened	% Ope...	Clicke...
	25,777	22,742	88.2%	1,741	1,292	2	2,322	10.2%	99
	24,745	20,895	84.4%	2,595	1,253	2	2,746	13.1%	344
	21,147	18,361	86.8%	1,821	963	2	2,271	12.4%	184
	20,180	17,942	88.9%	1,023	1,215	0	1,716	9.6%	114
	19,860	17,801	89.6%	1,130	929	0	2,463	13.8%	114
	14,256	12,882	90.4%	750	624	0	1,433	11.1%	52
	12,692	11,527	90.8%	608	557	0	1,213	10.5%	39
	12,665	11,514	90.9%	527	623	1	1,760	15.3%	30
	12,693	11,460	90.3%	589	643	1	1,971	17.2%	154
	12,599	11,400	90.5%	580	618	1	1,678	14.7%	77
	12,211	11,024	90.3%	585	601	1	1,409	12.8%	28
	10,875	9,684	89.0%	557	633	1	564	5.8%	17
	5,465	4,967	90.9%	283	215	0	398	8.0%	9
	4,751	4,574	96.3%	110	67	0	1,515	33.1%	133
	5,406	4,373	80.9%	981	52	0	699	16.0%	246
	4,334	4,192	96.7%	77	64	1	1,480	35.3%	101
	4,052	3,880	95.8%	47	124	1	420	10.8%	24
	2,601	2,529	97.2%	42	30	0	479	18.9%	96
	2,607	2,398	92.0%	182	27	0	504	21.0%	69
	2,420	2,358	97.4%	35	27	0	415	17.6%	45
	2,476	2,332	94.2%	109	35	0	429	18.4%	83
	2,411	2,308	95.7%	76	26	1	456	19.8%	74
	2,367	2,292	96.8%	51	24	0	506	22.1%	77
	2,320	2,242	96.6%	36	42	0	375	16.7%	52

You can also press the minus icon to roll up the data for your annual summary.

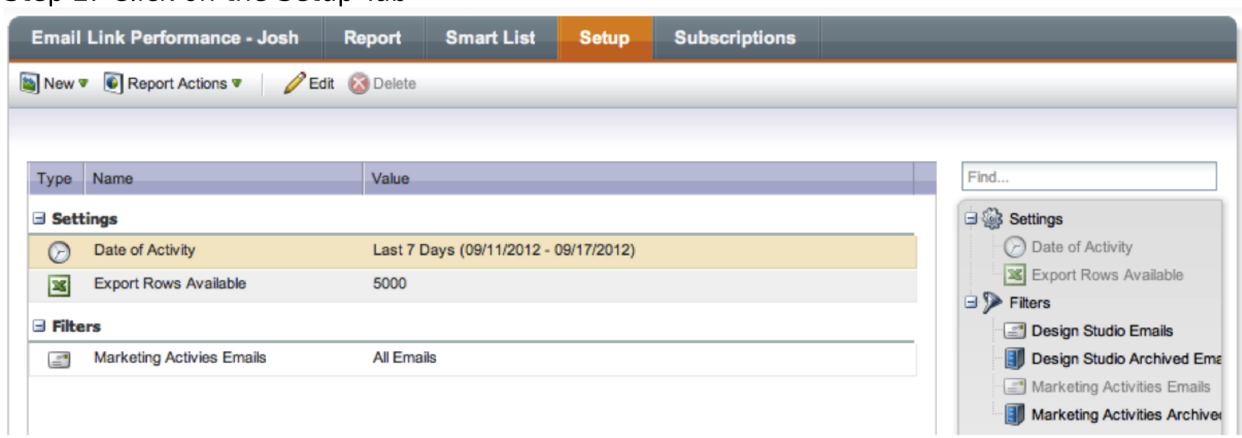


Email Link Performance Heatmaps

The Email Link Performance Report is helpful if you spend a great deal of time analyzing link placement, text, and CTAs in each email. You can use this data to construct a basic heatmap to see if people are looking and clicking at certain areas of an email over others. This is best combined with an AB Email Test.

Step 1: Clone the Email Link Performance Report

Step 2: Click on the Setup Tab

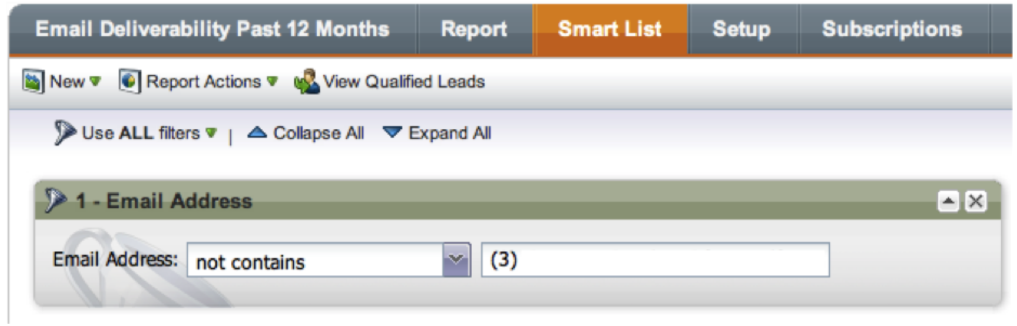


Step 3: Select the Email(s) to include

Select only the emails you are most interested in as this report shows individual emails. You may become overwhelmed with too many emails or Marketo will take a long time to tabulate results.

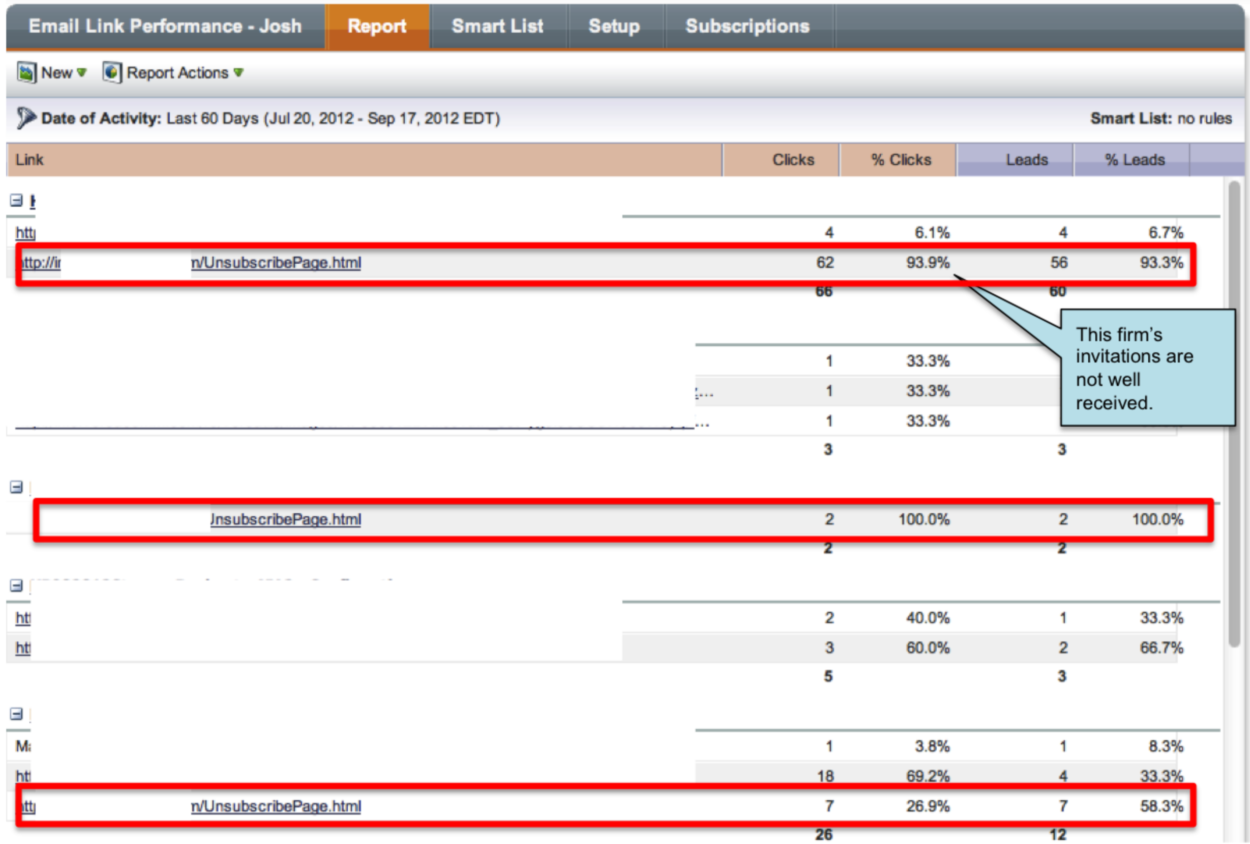
Step 4: Smart List

Say it with me folks, "Exclude the Test Leads!"



Step 5: Run Report

You will see a list of Email Names with the Clicked Links underneath. Feel free to click on the Email Name to see a Preview or click on the link to see where it takes you.



Step 6: Select an Email to Heatmap

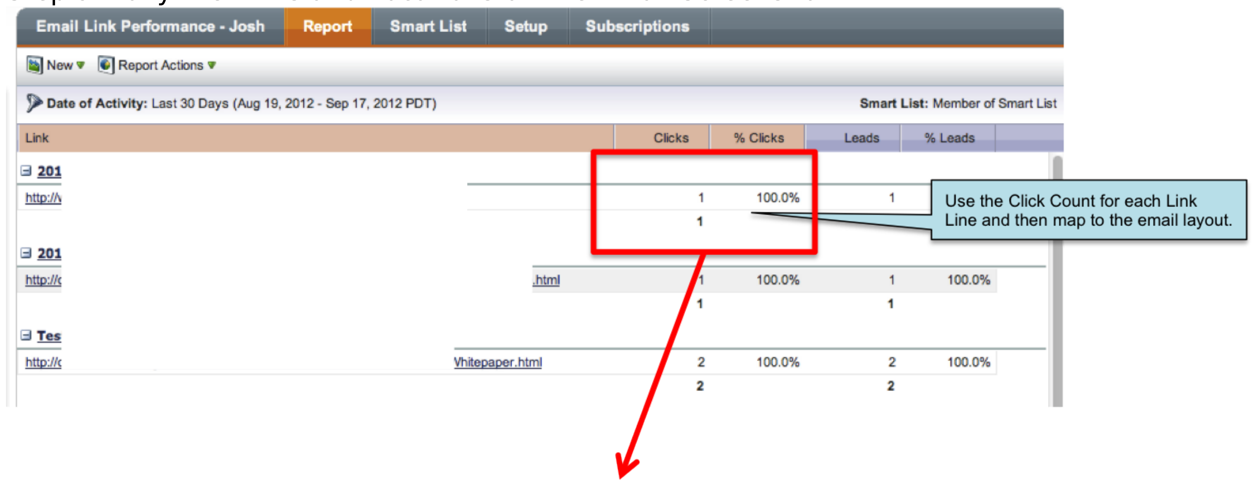
In this case, we'll select a recent email.

Step 7: Take a Screenshot of the Email

Step 8: Open an Image Editor (or PowerPoint)

In this example, we'll place this in PowerPoint.

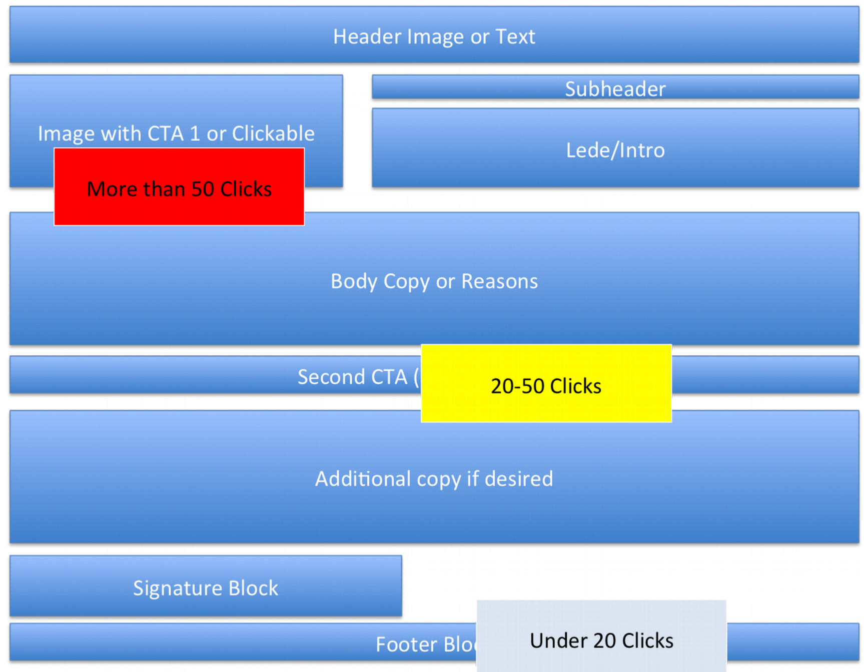
Step 9: Tally the Links and Locations on the Email Screenshot



Color code the clicked areas by High, Medium, Low according to a pre-set scale depending on your volume of email. For example:

Cold Blue:	Under 20 Clicks
Mild Yellow:	20 to 50 Clicks
Hot Red	Over 50 Clicks

In this very poor example, you can see what you can do with a screenshot of your email and a quick color-coding scheme. My ideal scenario has tons of clicks above the fold, fewer in the middle, and no one selecting Unsubscribe in the Footer.

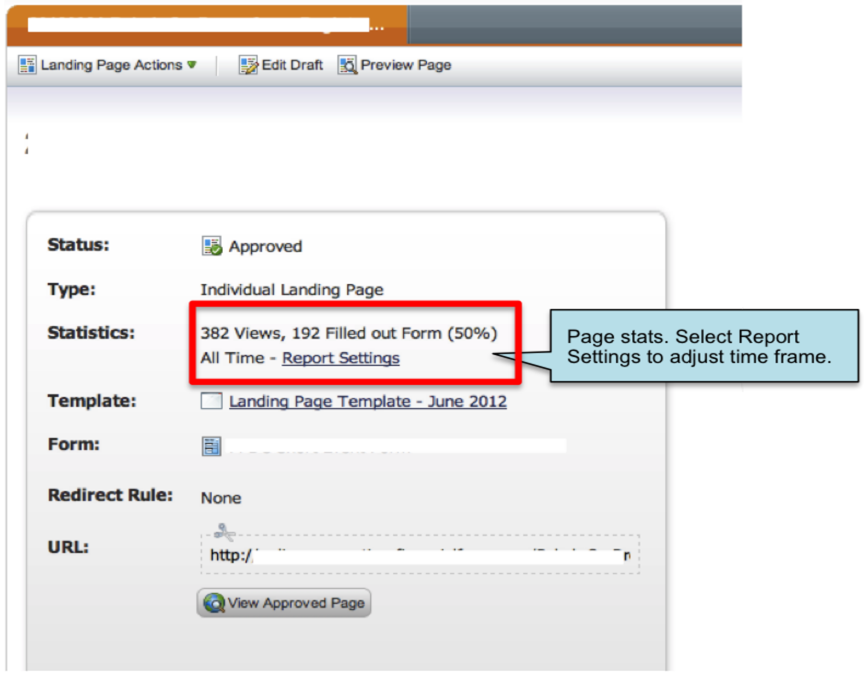


And now you have a basic heatmap!

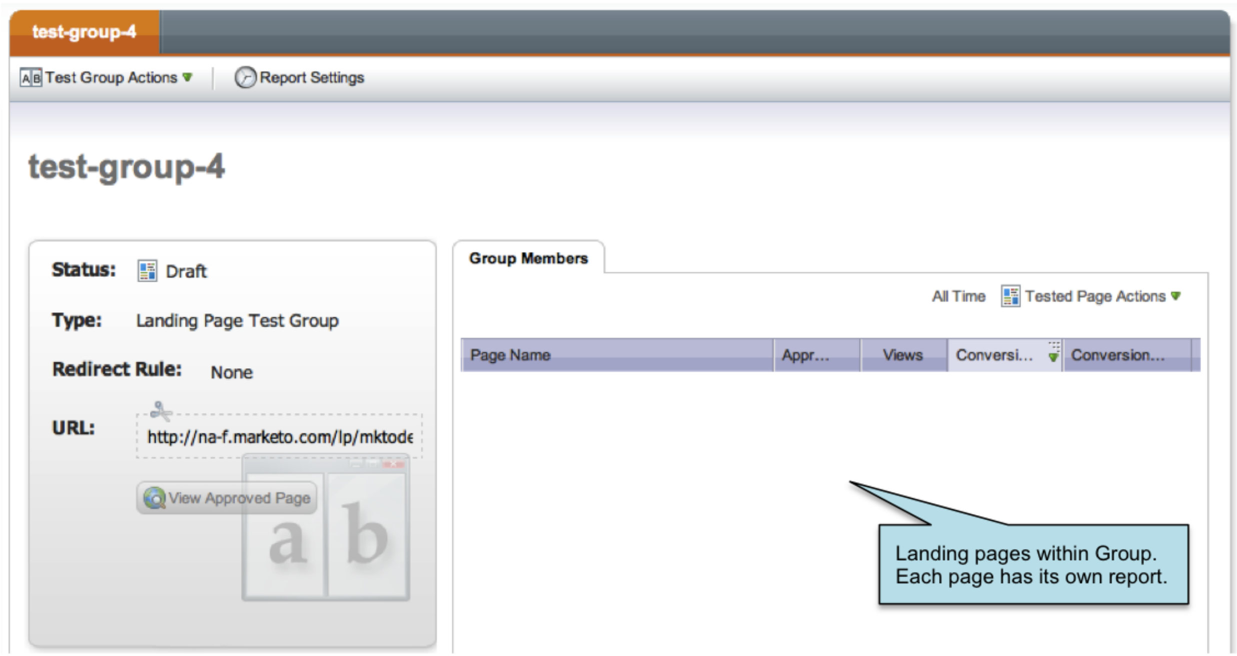
Landing Page Report Customization

The marketers’ delight! Page conversion reports in one spot. If you are doing serious AB testing, you can clone the report and select the pages and page groups you wish to chart. Remember Landing Page reports can be found in three places:

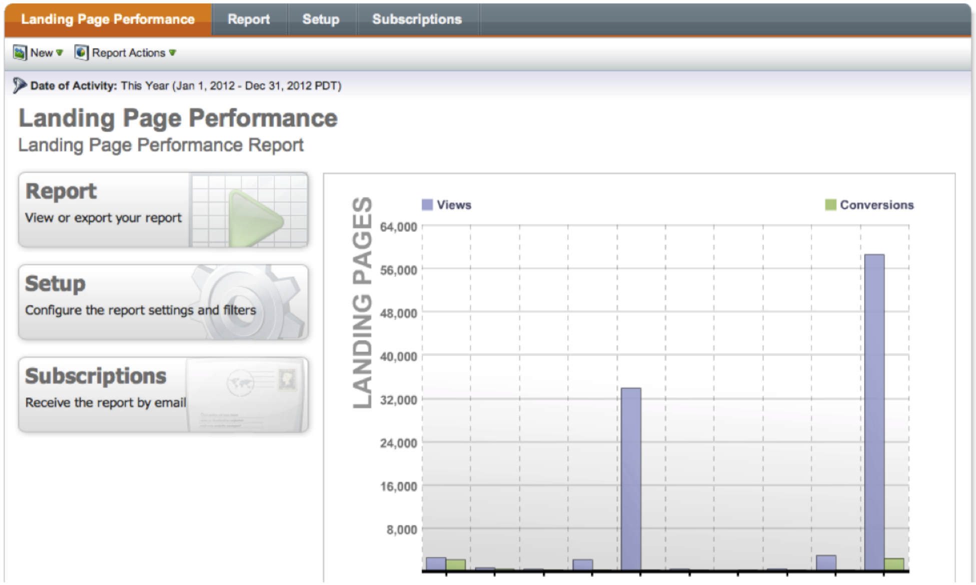
Landing Page Overview for that page



Landing Page Test Group Overview



Landing Page Performance Report



Note: you cannot use Smart List constraints on Landing Page Reports. Try a Lead Report instead.

There are several uses for Landing Page Performance reports. Creating these reports requires similar steps, but slightly different Filters on Setup. There are no Smart List options for Landing Page reports.

- Pages by Time of Page Activity
- Pages by Channel Over Time

Step 1: Clone the Landing Page Performance Report

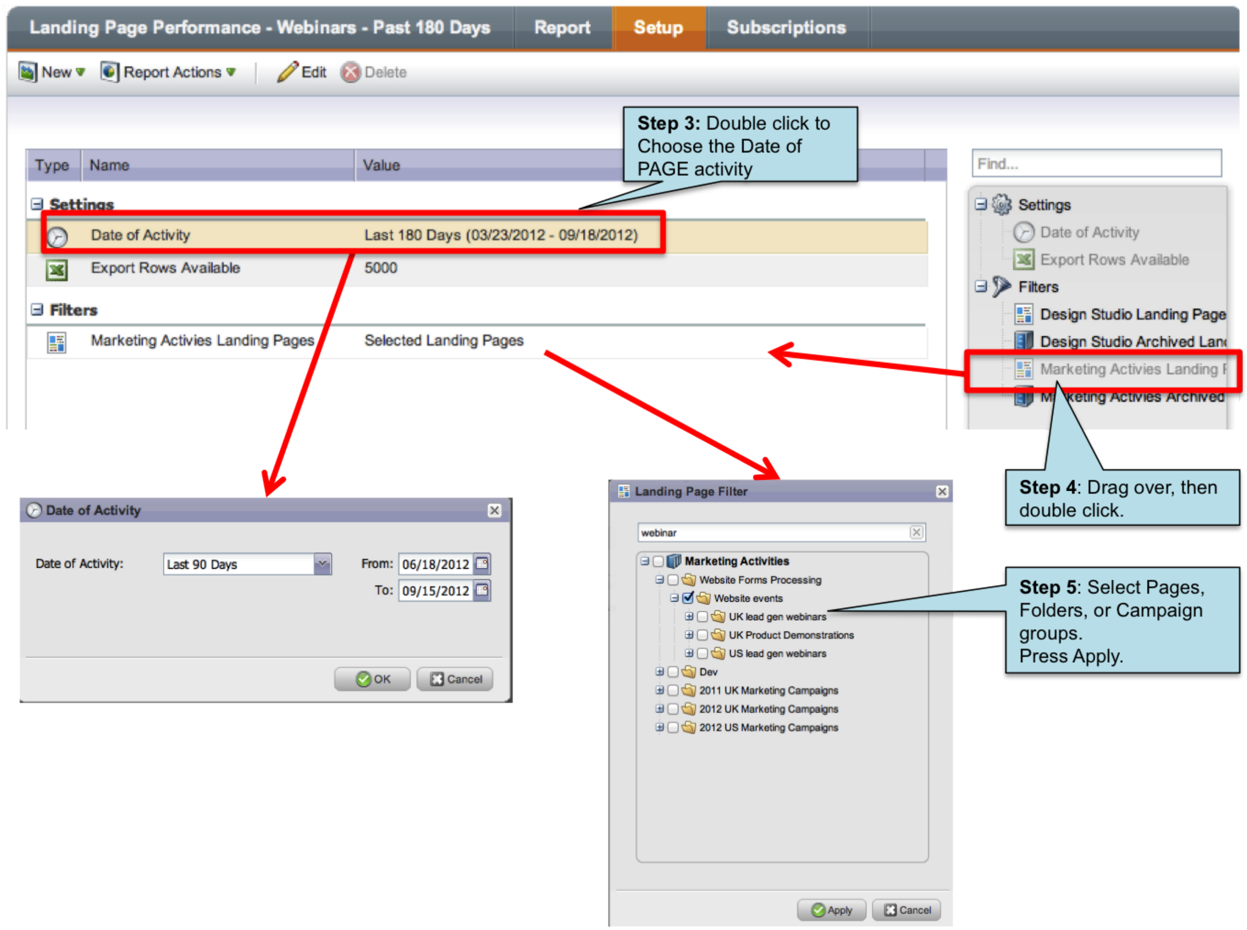
Name this `Landing Page Performance – Webinars – Past 180 Days`

Step 2: Click on the Setup Tab

Step 3: Change Date of Activity to Last 180 Days

Step 4: Drag in Marketing Activities Pages

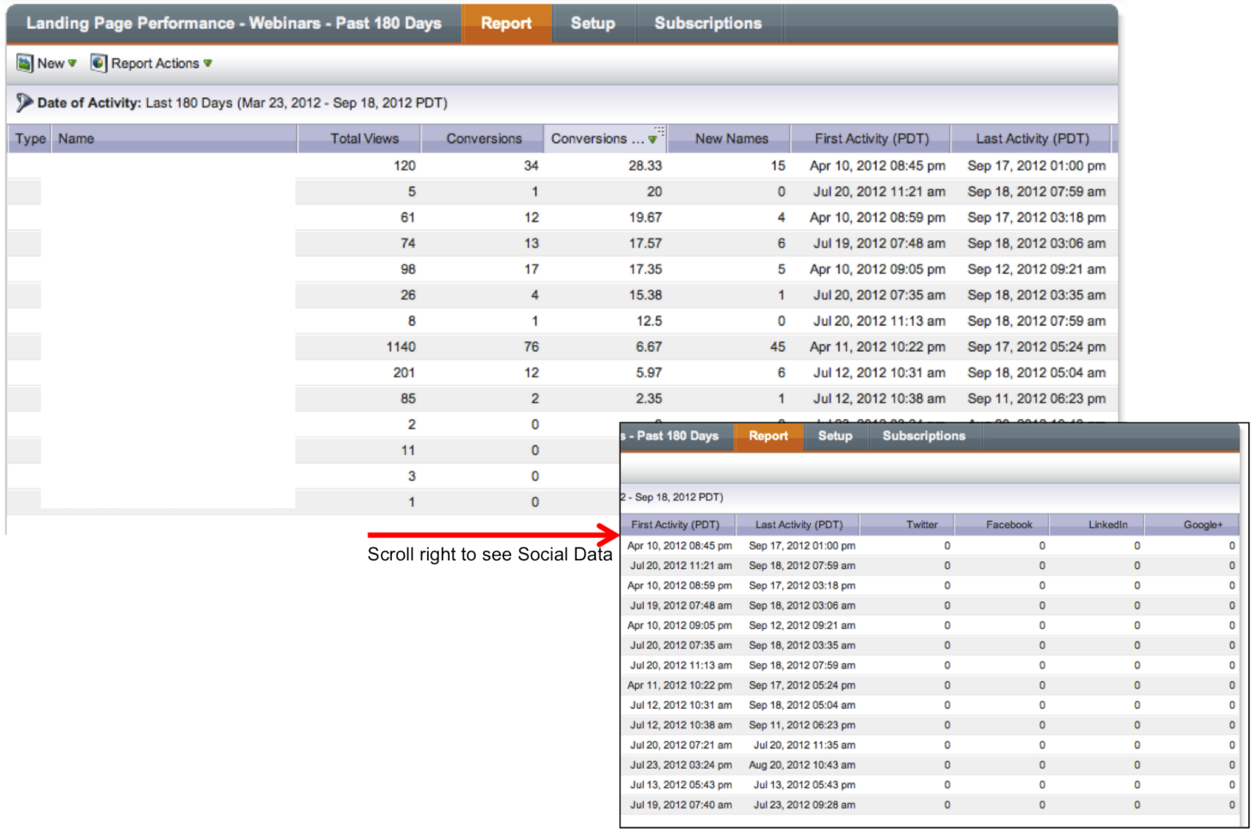
Step 5: Select the Folder(s), Campaigns, or Programs you want.
In this case, we will check the Webinar folder(s) or Programs.



Step 6: Run Report

Note: scroll to the right to see Social Sharing data for this page (if available).

The report will show you pages with activity in the Last 180 Days, which are under the Webinar Folder(s) selected. From our selection, we can sort by highest to lowest Conversion %, demonstrating our best performing pages. Those are the best performing pages, not necessarily your best performing webinar.



Type	Name	Total Views	Conversions	Conversions ...	New Names	First Activity (PDT)	Last Activity (PDT)
		120	34	28.33	15	Apr 10, 2012 08:45 pm	Sep 17, 2012 01:00 pm
		5	1	20	0	Jul 20, 2012 11:21 am	Sep 18, 2012 07:59 am
		61	12	19.67	4	Apr 10, 2012 08:59 pm	Sep 17, 2012 03:18 pm
		74	13	17.57	6	Jul 19, 2012 07:48 am	Sep 18, 2012 03:06 am
		98	17	17.35	5	Apr 10, 2012 09:05 pm	Sep 12, 2012 09:21 am
		26	4	15.38	1	Jul 20, 2012 07:35 am	Sep 18, 2012 03:35 am
		8	1	12.5	0	Jul 20, 2012 11:13 am	Sep 18, 2012 07:59 am
		1140	76	6.67	45	Apr 11, 2012 10:22 pm	Sep 17, 2012 05:24 pm
		201	12	5.97	6	Jul 12, 2012 10:31 am	Sep 18, 2012 05:04 am
		85	2	2.35	1	Jul 12, 2012 10:38 am	Sep 11, 2012 06:23 pm
		2	0				
		11	0				
		3	0				
		1	0				

First Activity (PDT)	Last Activity (PDT)	Twitter	Facebook	LinkedIn	Google+
Apr 10, 2012 08:45 pm	Sep 17, 2012 01:00 pm	0	0	0	0
Jul 20, 2012 11:21 am	Sep 18, 2012 07:59 am	0	0	0	0
Apr 10, 2012 08:59 pm	Sep 17, 2012 03:18 pm	0	0	0	0
Jul 19, 2012 07:48 am	Sep 18, 2012 03:06 am	0	0	0	0
Apr 10, 2012 09:05 pm	Sep 12, 2012 09:21 am	0	0	0	0
Jul 20, 2012 07:35 am	Sep 18, 2012 03:35 am	0	0	0	0
Jul 20, 2012 11:13 am	Sep 18, 2012 07:59 am	0	0	0	0
Apr 11, 2012 10:22 pm	Sep 17, 2012 05:24 pm	0	0	0	0
Jul 12, 2012 10:31 am	Sep 18, 2012 05:04 am	0	0	0	0
Jul 12, 2012 10:38 am	Sep 11, 2012 06:23 pm	0	0	0	0
Jul 20, 2012 07:21 am	Jul 20, 2012 11:35 am	0	0	0	0
Jul 23, 2012 03:24 pm	Aug 20, 2012 10:43 am	0	0	0	0
Jul 13, 2012 05:43 pm	Jul 13, 2012 05:43 pm	0	0	0	0
Jul 19, 2012 07:40 am	Jul 23, 2012 09:28 am	0	0	0	0

Program Report Customization

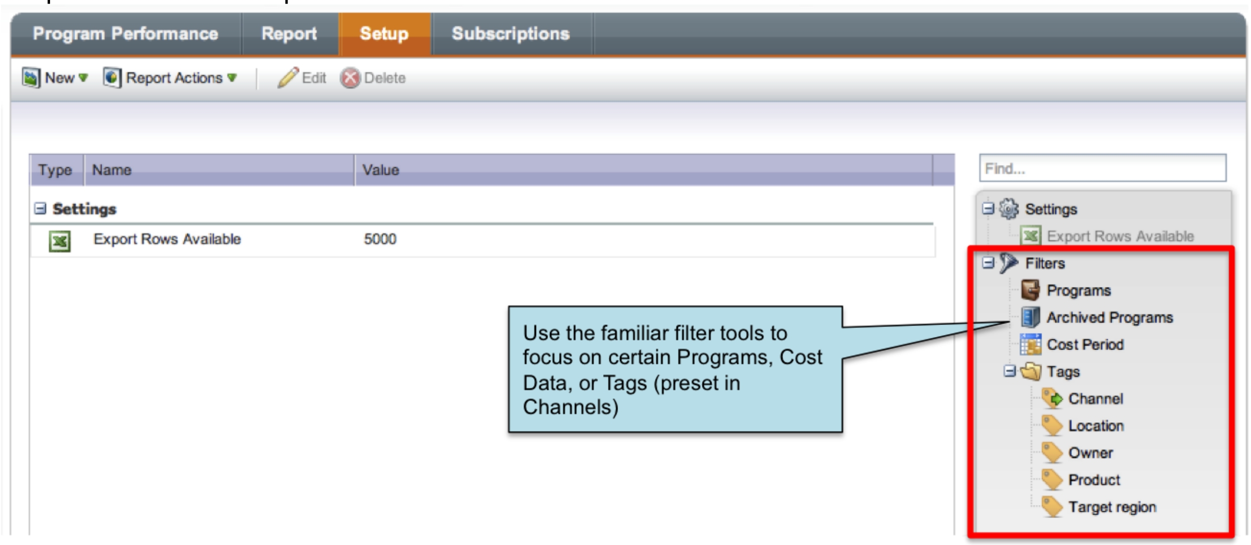
Program Performance reports are ideal for cross channel or roll up reports across Programs. If you are looking for data on one Program, your best bet is to click on that Program in Marketing Activities.

Key components to making Program Performance reports meaningful:

- Use Cost Period
- Use Success Flags on Progression Status
- Name Programs Properly: e.g.: 20120912 – Webinar – Economic Outlook

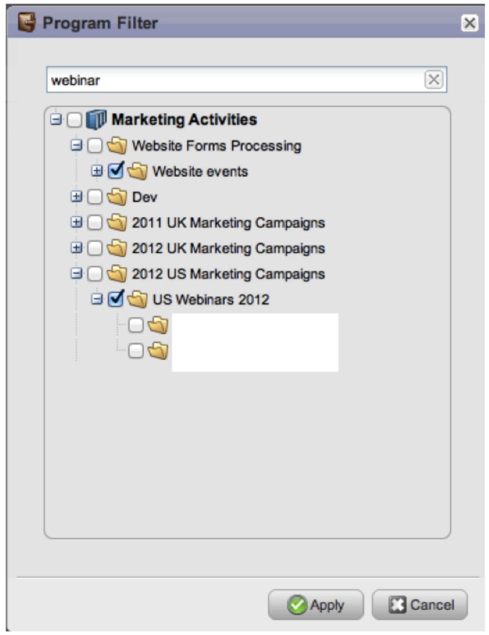
Step 1: Clone the Program Performance Report

Step 2: Click on Setup Tab



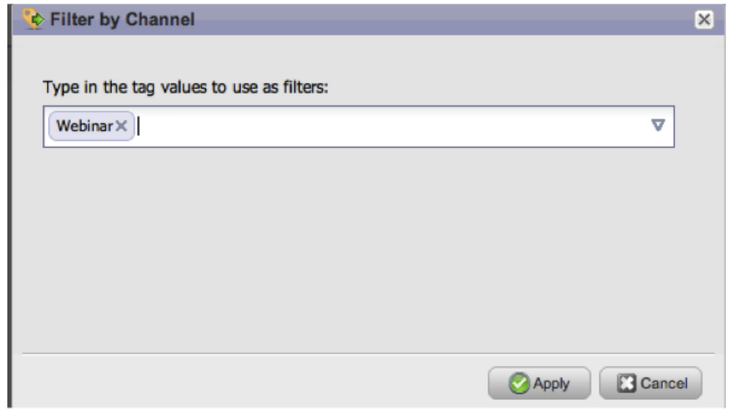
Step 3: Select a Filter

Programs: this is the same tree select we've seen elsewhere. If you organized all your Webinars in one place, you can easily select those folders. Or you can do a search like I did.



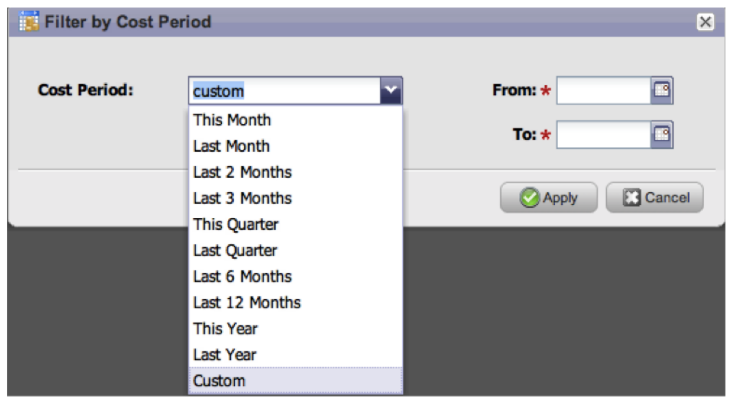
Channel = Webinar

I recommend doing this if you are tracking all activity since the beginning of time. Type in the name of the channel(s) you want to bring up the filter. Press Apply when done.



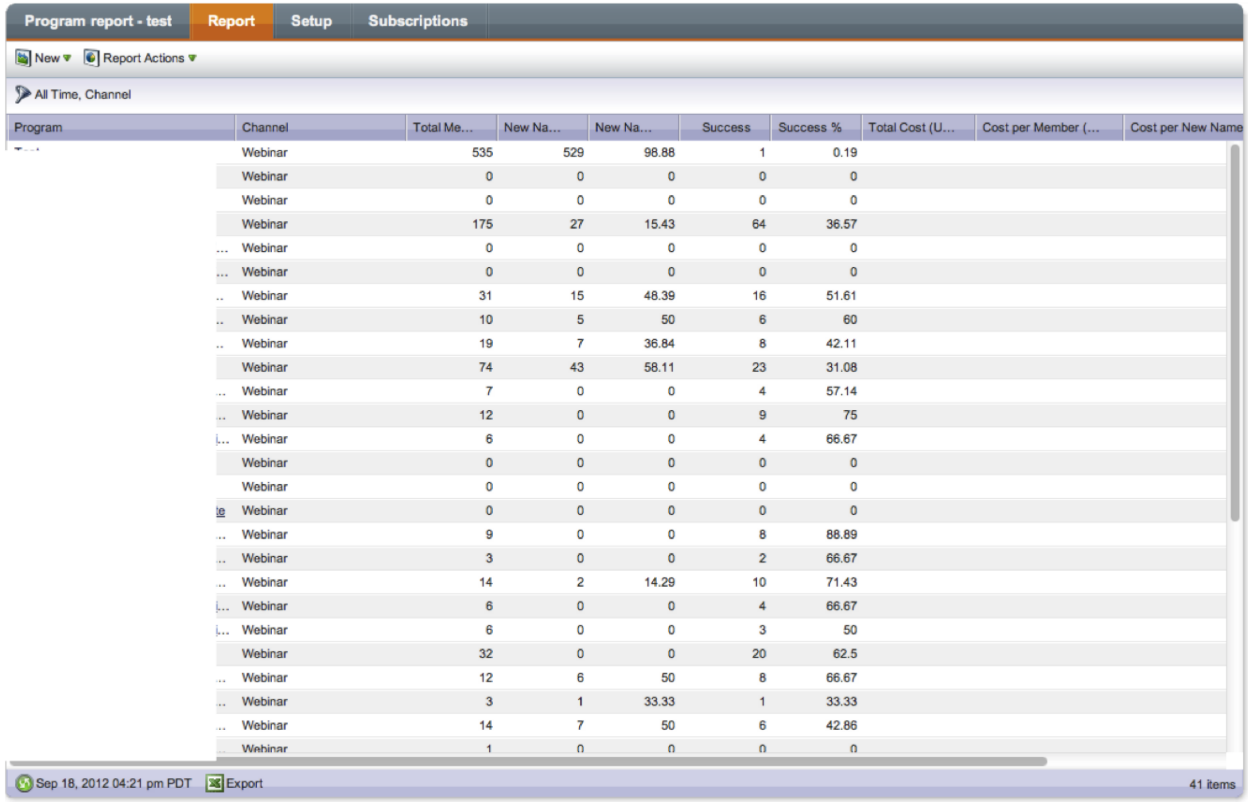
Cost Period

This will include cost data over the period selected, which may also constrain the activity view to those dates.



Step 4: Run Report

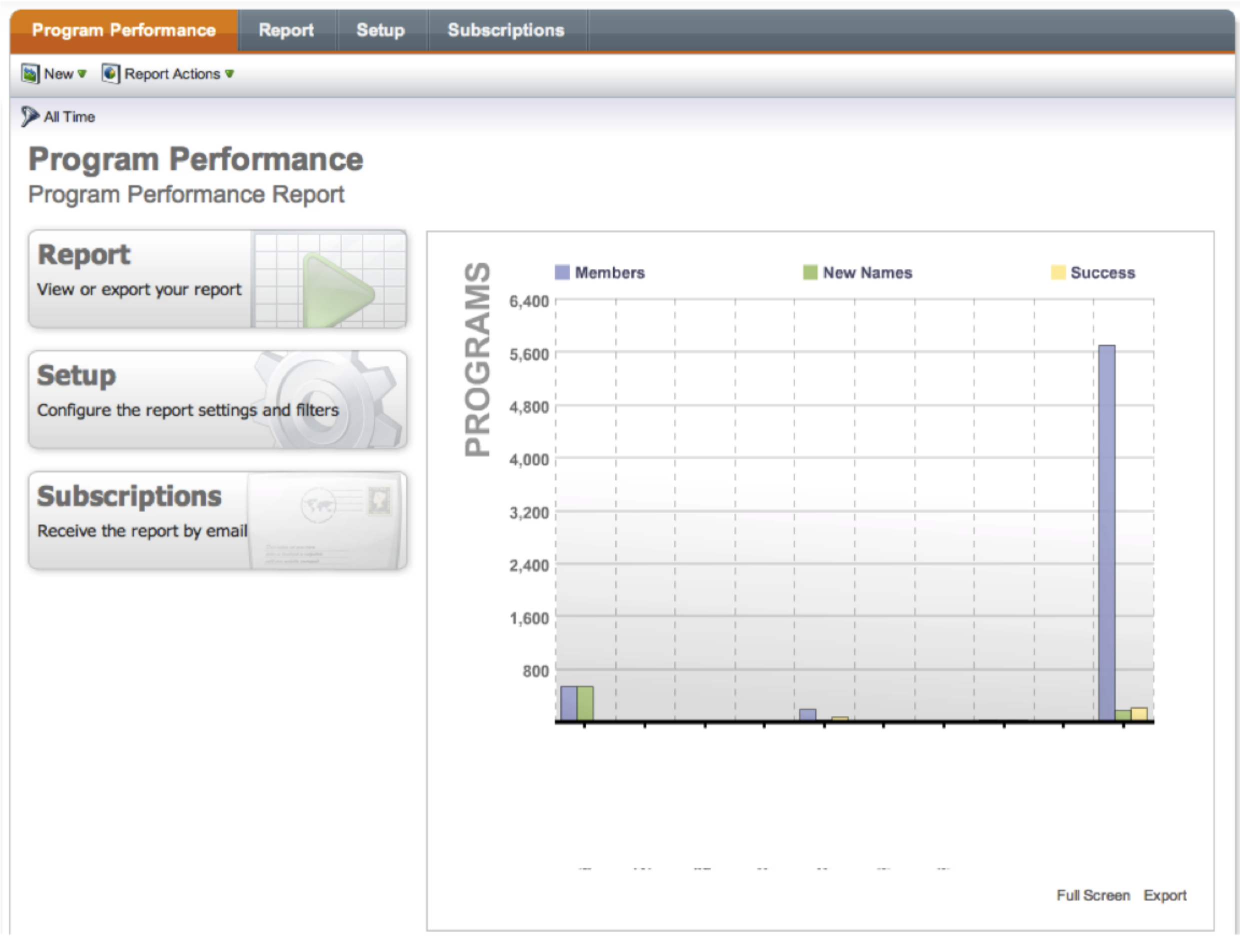
This report is a simple list of Programs that meet the criteria selected in Setup. In this case, we selected Programs set to Webinar Channel. Now we have a great summary of all of our webinars since the start.



Program	Channel	Total Me...	New Na...	New Na...	Success	Success %	Total Cost (U...	Cost per Member (...	Cost per New Name
	Webinar	535	529	98.88	1	0.19			
	Webinar	0	0	0	0	0			
	Webinar	0	0	0	0	0			
	Webinar	175	27	15.43	64	36.57			
...	Webinar	0	0	0	0	0			
...	Webinar	0	0	0	0	0			
..	Webinar	31	15	48.39	16	51.61			
..	Webinar	10	5	50	6	60			
..	Webinar	19	7	36.84	8	42.11			
	Webinar	74	43	58.11	23	31.08			
...	Webinar	7	0	0	4	57.14			
..	Webinar	12	0	0	9	75			
...	Webinar	6	0	0	4	66.67			
	Webinar	0	0	0	0	0			
	Webinar	0	0	0	0	0			
te	Webinar	0	0	0	0	0			
...	Webinar	9	0	0	8	88.89			
...	Webinar	3	0	0	2	66.67			
...	Webinar	14	2	14.29	10	71.43			
...	Webinar	6	0	0	4	66.67			
...	Webinar	6	0	0	3	50			
	Webinar	32	0	0	20	62.5			
...	Webinar	12	6	50	8	66.67			
...	Webinar	3	1	33.33	1	33.33			
...	Webinar	14	7	50	6	42.86			
	Webinar	1	0	0	0	0			

Note: leave off constraints so you can download a historic data list of all channels for a pivot table.

If you were entering `Cost Period` data into your Programs, you will see a fantastic calculation of Cost per Lead data which you can then Export using the XLS icon.



Other ways to report on specific groups of Leads include [this interesting discussion] with fellow Champions Delinda and Mark Farnell with Elliott Lowe's elegant answer.

Campaign Report Customization

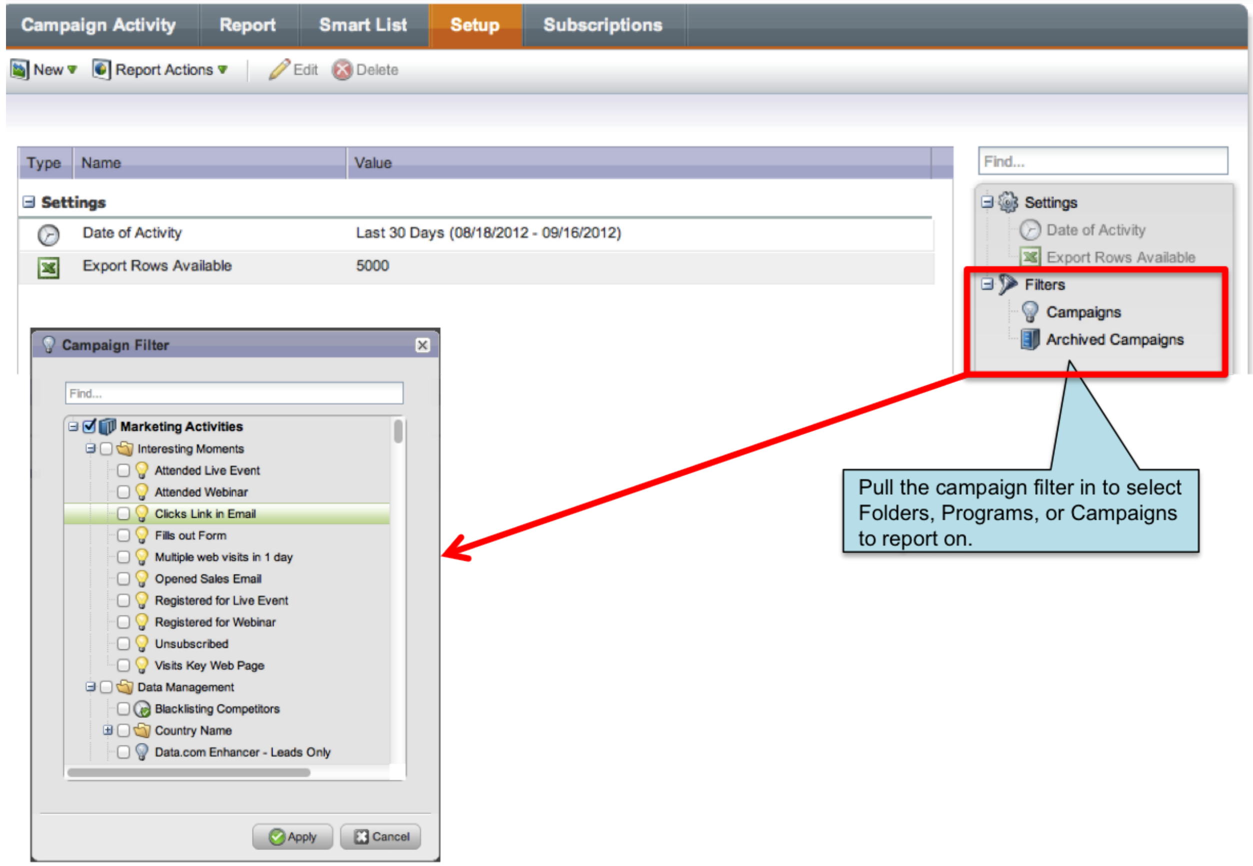
Campaign reports are ideal for monitoring all of your running systems in one place. You may want to clone this report into several categories:

- Webinars
- Data Management
- Nurturing Flows

Campaign Reports are simple and in most cases require limited customization.

Step 1: Clone Campaign Activity report

Step 2: Setup



Step 3: Date of Activity Selection

Remember this time is the Campaign Time of Activity based on your System Time.

Step 4: Choose Your Campaigns

Select Marketing Activities or to monitor Nurture Programs, select the appropriate Folders or Programs.

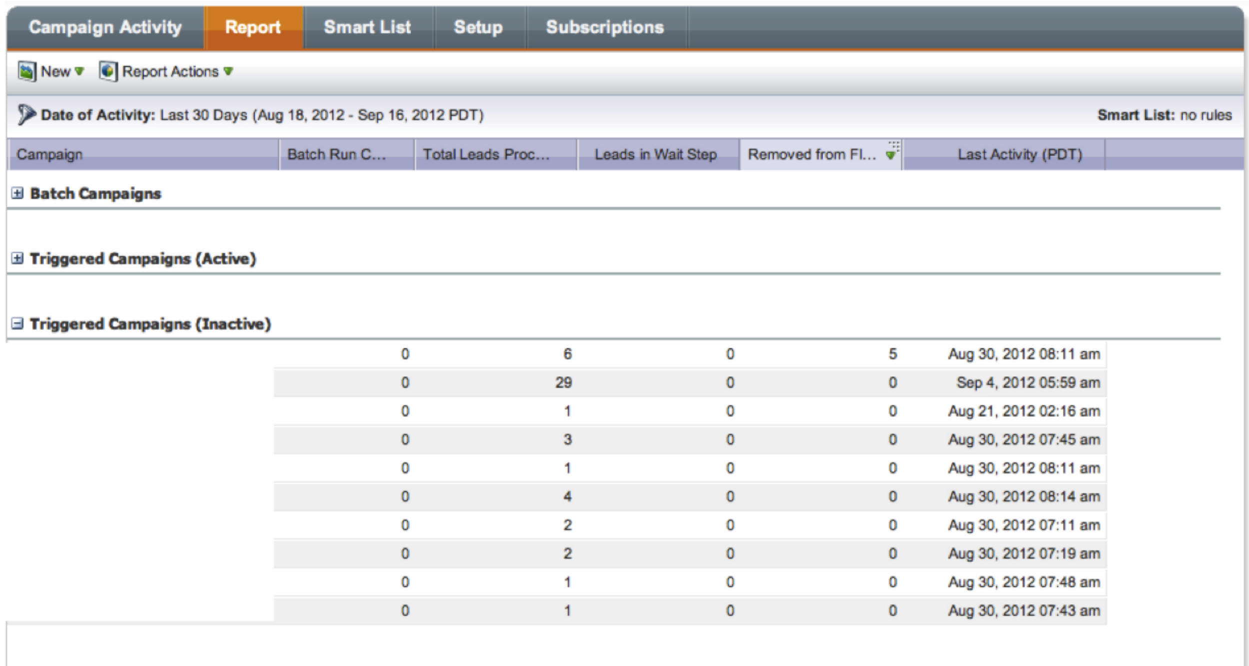
To monitor data management flows such as Lead Scoring, Interest Moments, Data Management, then select those folders instead.

Step 5: Smart List

In this case, we will leave the Smart List blank. Because we are reporting on current status of campaigns, it may not always make sense to exclude any leads. Of course, you can always exclude Test Leads or other lead groups, but be warned that your lead counts will not match the actual campaigns.

Step 6: Run Report

Click on the Report Tab…and…

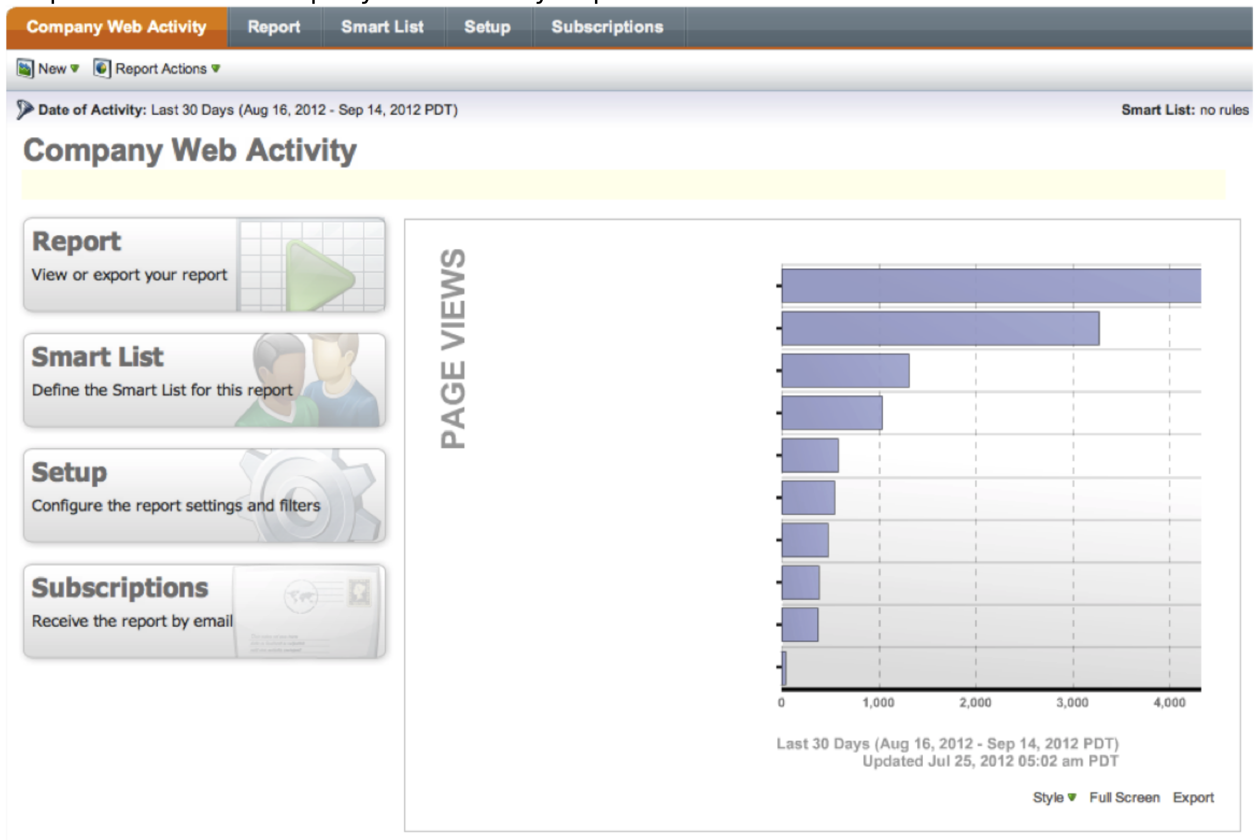


Company Report Customization

Company Web Activity Reports are ideal for sending daily to a sales person for prospecting needs. If you have a Strategic Accounts team, they should watch this data as well. Here are two use cases:

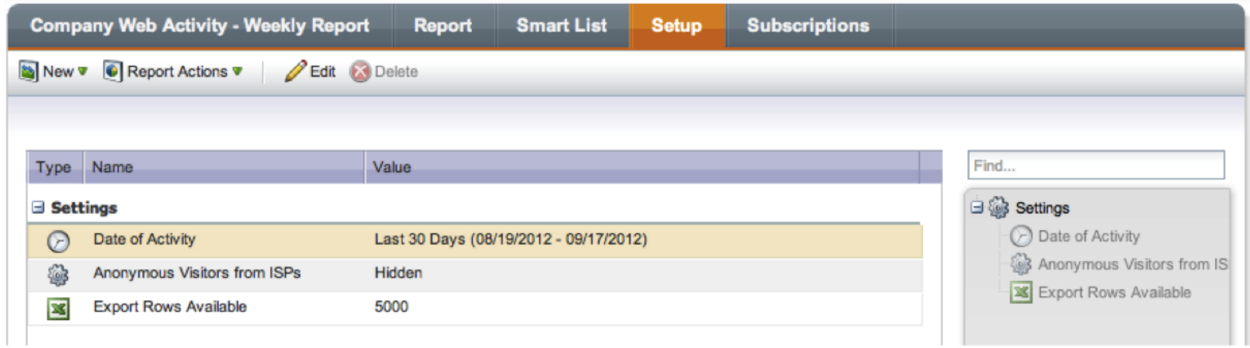
- Setup a report for a sales person
- Setup a report to monitor strategic account management

Step 1: Clone the Company Web Activity Report



Name the cloned report `Company Web Activity – US South – Past 30 Days`

Step 2: Click on Setup Tab



Step 3: Date of Activity

This is the lead activity of the last known visit. Last 30 Days is ideal for data collection.

Step 4: Anonymous Visitors from ISPs

Depending on your needs, you can exclude these leads. Strategic Account Managers may find it more useful to see any activity so they can see if their efforts are rippling across the organization.

Step 5: Smart List

In this case we will use more interesting filters because we want to include only leads from the US South.

Filter 1: `Country IS “United States”`

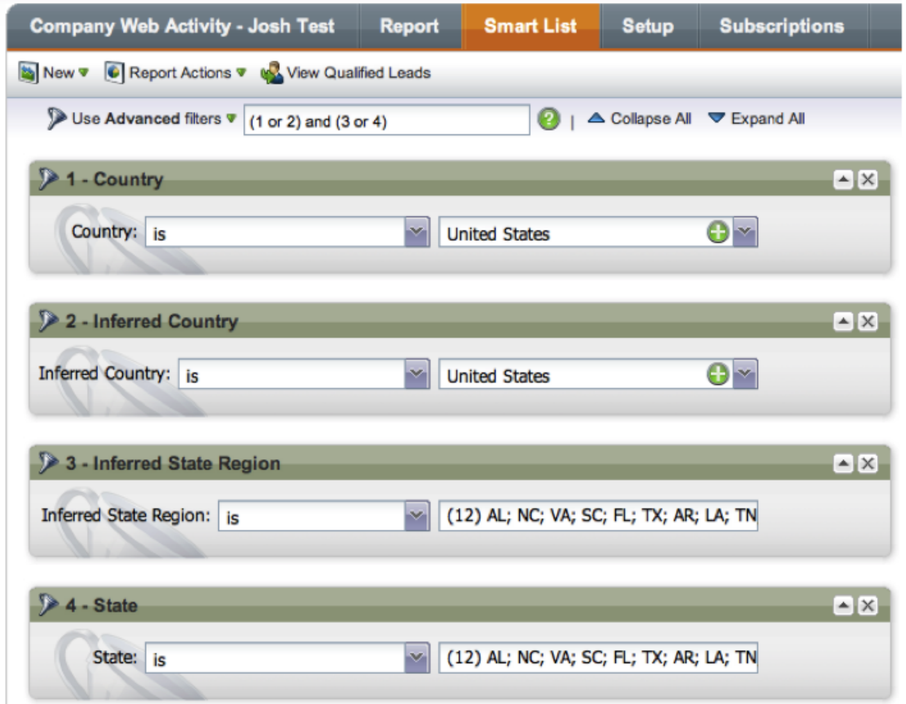
Filter 2: `Inferred Country IS “United States”` because we are looking at ISP data.

Note: this logic may exclude leads we want if they have NULL in these fields.

Filter 3: `Inferred State Region IS [x]`

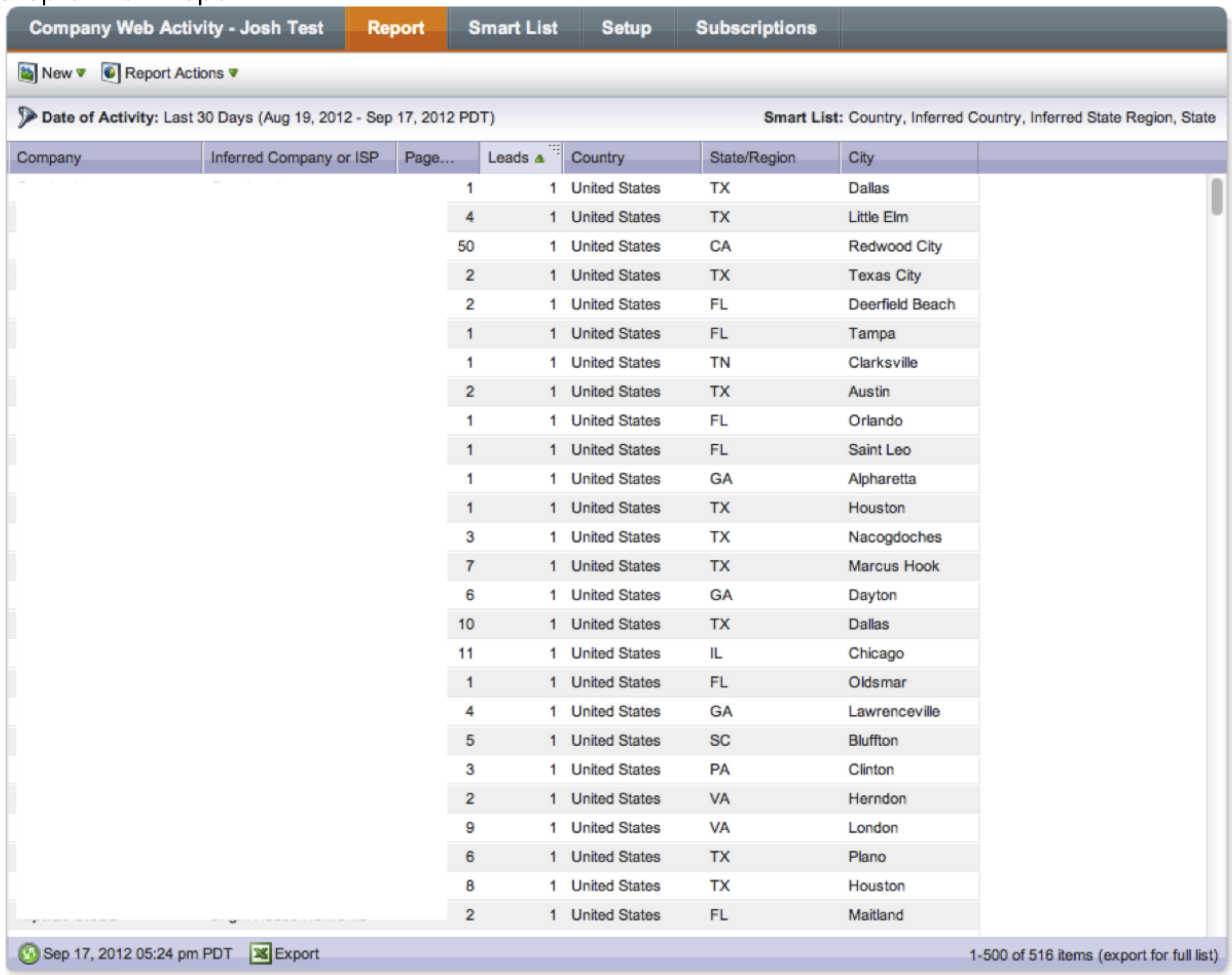
Filter 4: `State IS` [state abbreviations]

Adjust the Filter Logic to `Advanced: (1 or 2) AND (3 or 4).`



Wait for Marketo to save the Smart List.

Step 6: Run Report



Company	Inferred Company or ISP	Page...	Leads	Country	State/Region	City
		1	1	United States	TX	Dallas
		4	1	United States	TX	Little Elm
		50	1	United States	CA	Redwood City
		2	1	United States	TX	Texas City
		2	1	United States	FL	Deerfield Beach
		1	1	United States	FL	Tampa
		1	1	United States	TN	Clarksville
		2	1	United States	TX	Austin
		1	1	United States	FL	Orlando
		1	1	United States	FL	Saint Leo
		1	1	United States	GA	Alpharetta
		1	1	United States	TX	Houston
		3	1	United States	TX	Nacogdoches
		7	1	United States	TX	Marcus Hook
		6	1	United States	GA	Dayton
		10	1	United States	TX	Dallas
		11	1	United States	IL	Chicago
		1	1	United States	FL	Oldsmar
		4	1	United States	GA	Lawrenceville
		5	1	United States	SC	Bluffton
		3	1	United States	PA	Clinton
		2	1	United States	VA	Herndon
		9	1	United States	VA	London
		6	1	United States	TX	Plano
		8	1	United States	TX	Houston
		2	1	United States	FL	Maitland

Step 7: Setup a Subscription for Sales

Web Page Report Customization

Web Page Reports are good choices for a prospector looking for specific territory leads. With some cloning and setup of territory reports, you can send these daily or weekly to a specific sales person.

If you have Sales Insight, train your team to use that tool inside the CRM instead.

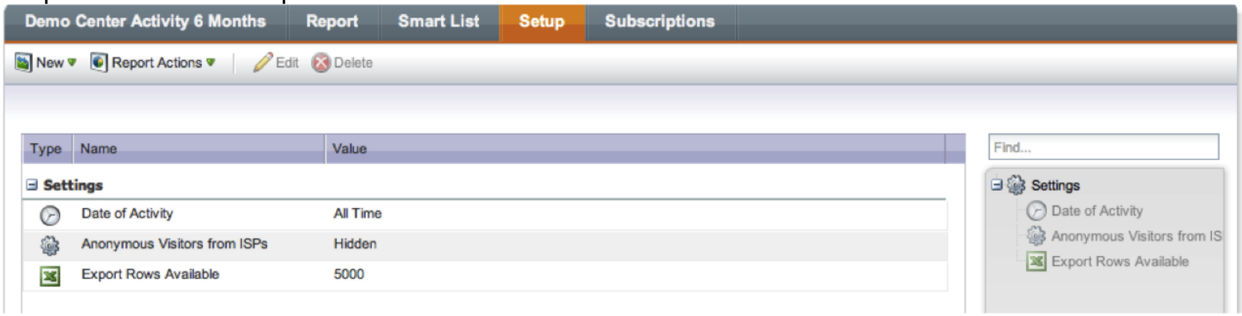
- Report for a Salesperson watching a particular set of companies.
- Monitor a demo-center on your site.
- See which pages are providing Opportunities. NOTE: you may find Lead Source or Programs better)

Basic Web Page Report

Step 1: Clone the Web Page Activity Report

Name this report Web Page Activity by Domain – Last 30 Days

Step 2: Click on Setup Tab



Step 3: Date of Activity

This is the activity date of the web page visit.

Step 4: Anonymous Visitors from ISPs

You can hide or include these leads to see.

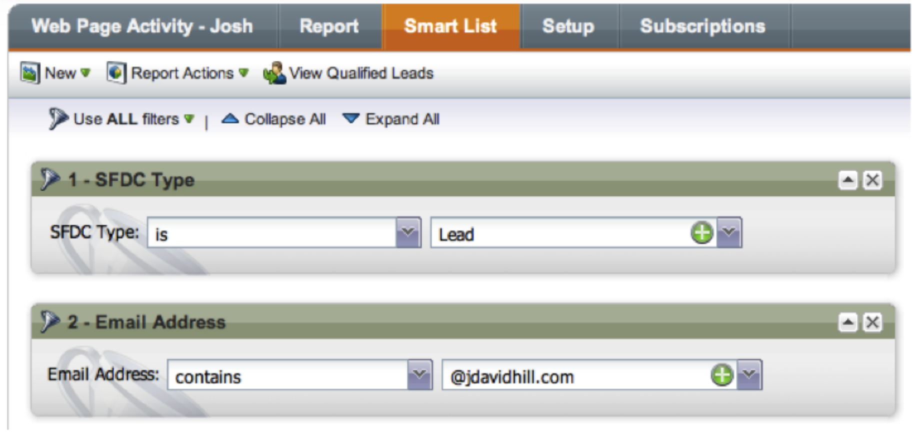
Step 5: Smart List

Salesperson report scenario: in this case I want to look at SFDC Leads who match a certain list of domain names.

Filter 1: `SFDC Type IS "Lead` "to restrict this to just real leads.

Filter 2: `Email Address CONTAINS "@jdavidhill.com"` because I'm looking for leads from my organization.

You could also say NOT CONTAINS to exclude certain domains, such as your own.



Web Page Demo Report

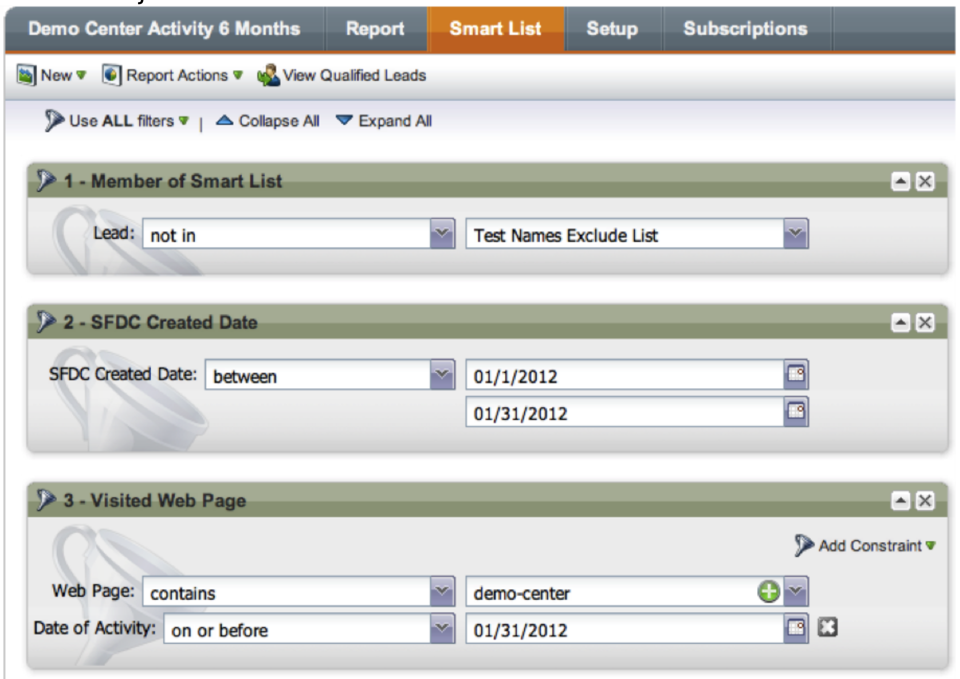
If you continue customization, you can then select pages or areas of your site to determine who is visiting your Demo Center, for instance.

In this example, the Smart List is now pulling in leads that only visited our Demo Center. Note that proper naming scheme allows the use of `CONTAINS "demo-center"` instead of having to select individual pages.

NOTE: the end result will look similar, but the leads will be ones who match the Smart List.

Step 1: Clone the report you made in the previous section

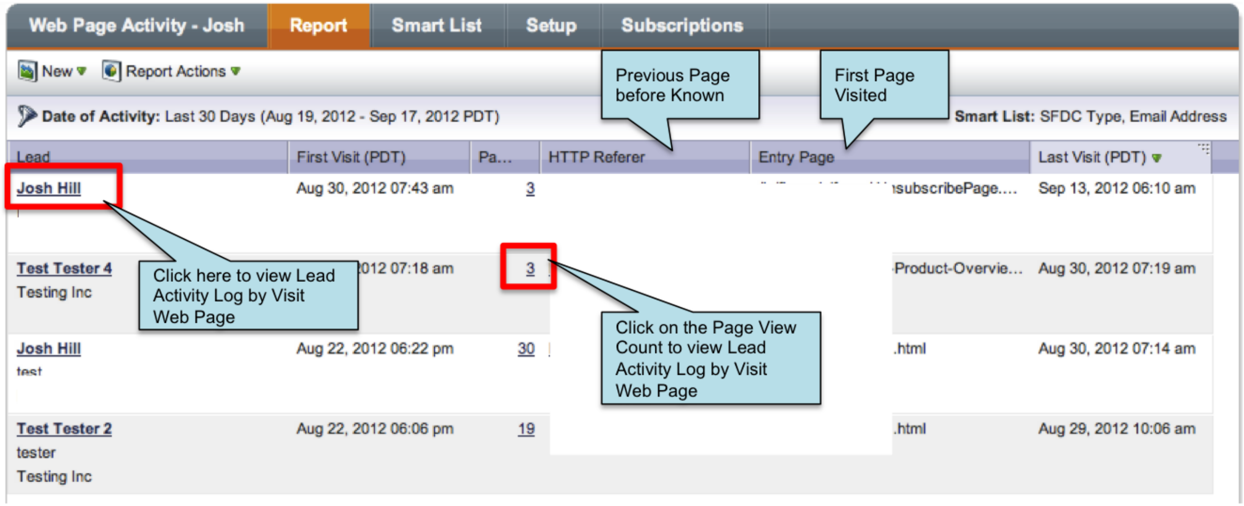
Step 2: Smart List Adjustments



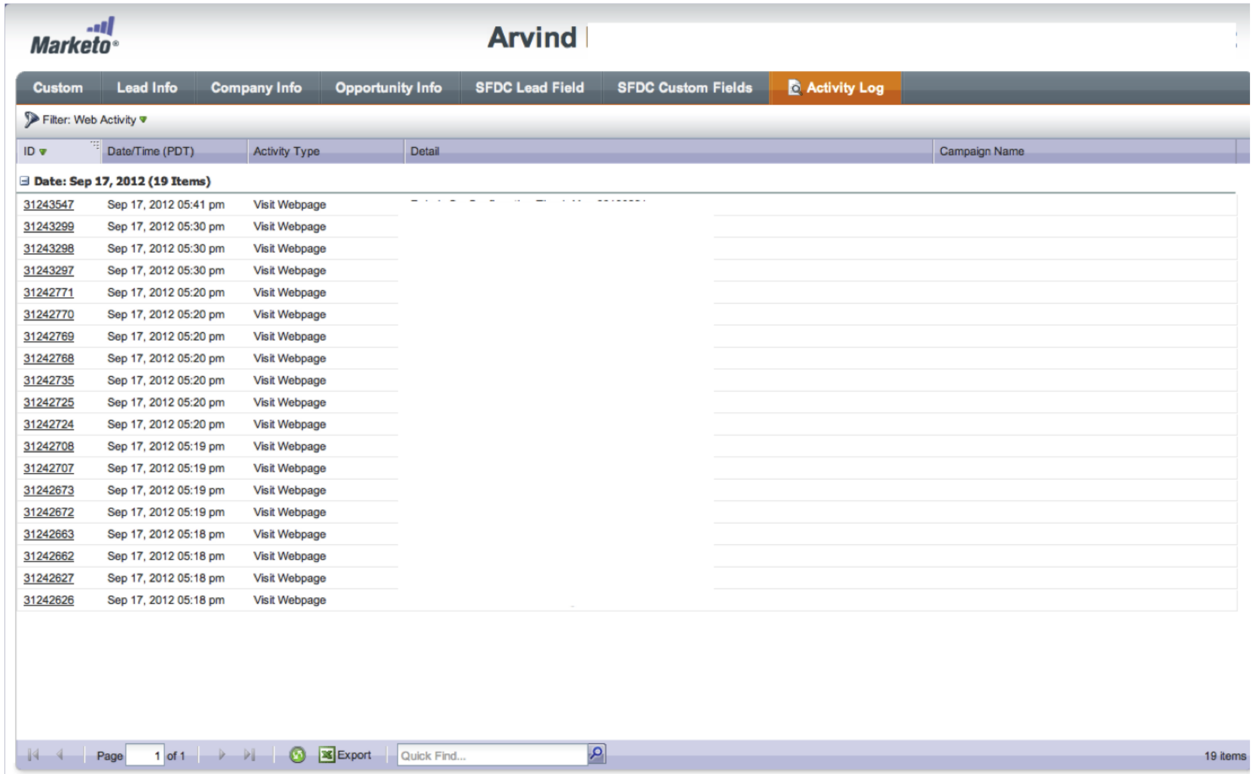
The Page Opportunity Smart List would include the filter `Has Opportunity = TRUE`.

Step 3: Run Report

The report will show you a list of lead names with the pages they have visited within the Last 30 Days including their first visit and URL prior to visiting. In this way you can also learn more about where your leads are finding you in the first place.



The Web Page Activity report has two links per row which both take you to the Lead Detail Screen with the Activity Log pre-filtered by Visit Webpage. This is a fast way to show the recent list of pages this lead visited.



Step 4: Click on Subscriptions

Step 5: Create New Subscription

Now you can email this report to the appropriate sales rep every day (or week).

Social Influence Customization

The customization options on this report are limited to

- Date of Activity

- Export Rows
- Subscriptions

The Report itself shows a list of Leads and the number of shares they have provided you on Twitter, Facebook, G+, and LinkedIn, *assuming you've setup* Social Sharing on your landing pages.

Report FAQs and Troubleshooting

How do I change the default graphs in Marketo?

There is a small button at the lower right corner of the Overview page. If it says Style, you can click and adjust the Chart Style. (This is not available on all reports)

Changing Charts in Lead Reports:

The chart shows the count of leads based on the grouping from the first column. To change this, simply move a column into the first position.

Changing the Lead Graph Style

On Lead Reports, you can change the cart by going to the chart and clicking Style.

You can also export this chart for a fast PowerPoint graphic.

Why does my Smart List count of Was Sent Email differ from the Email Performance Report?

The Email Performance Report has its own logic that Marketo has defined in a certain way. This logic means one of the metrics in the report would count an event (Unsubscribed), which does not have a corresponding Log Item. Marketo says this causes discrepancies between smart list email filters and the Email Performance Report.

The logic has the Four Rules of Email Performance:

Rule 1: One Activity Only	Each email activity record is set to one of the following: Delivered, Hard Bounced, Soft Bounced, or Pending.
Rule 2: Opens	Opened = Delivered
Rule 3: An Action indicates Opened or Delivered	Clicked in Email OR Unsubscribed = Opened = Delivered

Rule 4: Bounce Priority	If email is Opened, any bounces are ignored. If email is not Opened, Hard Bounced > Soft Bounced or Delivered. Thus, the record will show Hard Bounced.

How can I create cross-tab to show Leads by Source who also did X?

- Use Drill Down – only on Lead Performance Reports
- Use a Smart List Constraint
- Try a Smart List Column
- Use Groupings

I want to send a report to someone on a regular basis, how do I do that?

Setup a `Subscription` using the Subscriptions Tab.

Why is my report not showing the right data? I know something happened in the last day.

Try these two steps:

Step 1: Refresh Report

Check the date of the last `Report Run` in the lower right corner of the Overview, or the lower left corner of the Report screen. 

Press `Refresh` icon or the `Refresh` button on the overview page. 

Wait.

This almost always solves the problem.

Step 2: Check Report Settings

If that still did not work, your settings or choice of report may be incorrect. Review the Setup and Smart List tabs again.

Be sure to review the `Date of Activity` criteria or Selected Filter as they could be out of step with your intentions.

I want to build a lead funnel visualization complete with data.

Me too.

There are a few options for building the nice lead funnel:

- **Do it Yourself**: Collate the data from various Salesforce or Marketo lead source reports. Then you can put the data into Excel. Once there, you can then use PowerPoint to build funnel visualization, then add the data. Definitely works and it just requires some time.
- **Salesforce Dashboards**: with some work, you can have your SFDC Admin program table or other visualizations into your Marketing Dashboard. This may rely on field changes and Opportunity data, so it can become complicated quickly.
- **SFDC Campaign Roll Ups**: if you are managing your funnel with SFDC Campaigns and Statuses, you can have your parent campaign data roll up child data and then summarize it. Probably not the best way.
- **Revenue Cycle Modeler**: you likely have access to this already. Take some time to build out the Revenue Stage system inside Marketo, and then activate your funnel. This will look just like it does when Marketo sold it to you! And you now have an in-demand skill ☺.
- **Revenue Cycle Analytics**: if you can pay for this tool and use Programs religiously, you will see fantastic data.

I want to show ROI like Jon Miller! His reports are AWESOME.

Yah, he's pretty cool. Good thing he has RCA to make those awesome reports ☺ Be like Jon, get RCA today.

Ok, seriously, if you don't or cannot afford RCA, you have a few options.

- Get RCA
- Build an RCM to at least have a lead funnel report.
- Build out your Program and Campaign Reports
- Use SFDC Campaign and Opportunity Data to build similar reports. You can even add fields to the Campaign Record to help roll up data across multiple campaigns and channels. Ask your SFDC Admin for help.

I don't want to pay for RCA, how do I build a funnel?

See above.

Will my reports lose data if I Archive emails, pages, programs, or campaigns?

The short answer is No. The report Setup has Archived filter options in most cases. The longer answer is it is possible to lose data through deleting records, campaigns, programs, lists, pages, etc. Marketo will also automatically remove certain log events for Inactive Anonymous Leads, Web Activity, and Changed Data Value after 90 days. Known Leads are not affected except for the listed log activities, which are deleted after 90 days.

- Change score
- Change data value – except changes to the Lead Owner and the Company Name fields

- Visit webpage
- Click link on webpage
- Sync lead to Salesforce.com

Chapter Review

Self-Quiz

When will the Social Influence show data?

____

Why do Email Performance Reports sometimes differ from Email Filter Smart Lists?

____

____

Recommended Resources

Marketo Documentation Marketo

A Marketo Course on Analytics

How to Get Started with RCA – with Jon Miller and Alexandre Pelletier (Summit 2012)

Advanced Reporting with Programs and RCA

Analytics and Reporting Marketo Course (2012)

Analytics Basic Overview

Analytics: Program Performance Report

Campaign Activity Report

Change the Expiration Time for URLs in Subscription Reports (usually they are 3 days)

Company Web Activity Report

Creating an Revenue Cycle Modeler

Definitive Guide to Marketing Metrics (September 2012)

Drill Downs

Group by Segmentation

Hide Anonymous

Landing Page Report

Lead Grouping - old

Lead Performance

Marketo Lead Management Tutorial - Basic

Marketo Masters Webinar - Older (2010)

Marketo Report Basics (2010) Still useful.

Number of Rows

Program Reporting

Report Settings

Report Subscriptions

Reporting Section Summary

Revenue Cycle Analytics Documentation

Revenue Cycle Modeler Home

Marketo Community Marketo

Tools

Lenskold Group's Lead Gen Calculator – a fantastic resource to start your budgeting [Lenskold]

Chapter 22. Nurturing Programs

Chapter 23. "Revenue is the destination"

-Marketo's *Definitive Guide to Lead Nurturing*

At a Glance

Table of Contents

Overview

> "95% of prospects on your site are doing research, but 70% of them will buy a product from you or your competitor." – Marketo's Definitive Guide to Lead Nurturing.

Lead nurturing is one of those things people want to have and make happen, yet few marketers have actually built a true nurturing system with all the automation, content, and tracking Marketo promised. Why? The short reason is it is ***hard***. The longer reason is it takes a concerted effort across marketing and sales to plan it out, build content, and build systems to manage and report on success.

In this key section, we will walk through the nurturing development process using various Marketo and Marketo client suggestions. The goal is a basic and then an advanced nurture system which provides customers with content relevant to their needs while encouraging increasing levels of engagement with your firm.

We will start with Basic Nurturing includng Drips, Automatic Flows, and triggered systems then progress to some more complicated workflows. We will also review possible reporting methods.

There's no reason not to do this and every reason to setup a proper nurturing system.

Be a Nurture Architect

Best Practice: Know Your Audience Before You Begin

Your job in Marketo is to be the architect of nurturing. There are multiple assets, flows, and data flowing through your system. It is your responsibility to create the paths and checkpoints that take the correct actions.

Many professionals use a workflow tool like Gliffy or Visio to map out the lead's journey. I do recommend sitting down with your team and with Sales to craft a process for the Lead journey. This process can be especially powerful for a 1 Year Customer Journey from Contract Signing to Renewal. There is nothing quite like a big piece of paper or a whiteboard to get started ☺.

As Marketo notes in its Definitive Guide to Lead Nurturing, nurturing is not sending a random email and it is not sending out a newsletter. Nurturing is a plan matched to your target's buyer persona, buying process, and buying stage. In this Guide we will primarily discuss how to implement nurturing in the Marketo system, but doing so means you already thought about the Stages, the Content, and the Buyers involved. Remember you can incorporate your sales people into this process using a variety of techniques.

First, read the Definitive Guide to Lead Nurturing. Then come back here. Oh, you already have the plan? Great, please continue ☺.

Personas

Buyer Personas are key to setting up the nurturing programs because your content, offers, and timing should match the type of person you are sending it to.

Step 1: Have Buyer Personas

Step 2: Complete the Buyer Role and Stage Grid in the Definitive Guide.

Content Grid

Step 1: Complete the Content Grid, matching existing asssets as well as assets you will need.

Marketo recommends having at least 2 or 3 items per Role + Stage Cell. That means you will be able to either AB Test offers or setup an extended track for each Role and Stage.

Step 2: Begin Developing the Assets you need.

Here I wrote down the types of questions different users of Marketo would ask as they looked into expert help for their instance. Inserting this step will help guide you toward assets someone might need.

Stages/Buyers	**Loosening Status Quo**	**Committing to Change**	**Exploring Possible Solutions**	**Committing to a Solution**	**Justify the Decision**	**Make the Selection**
New Users	Starting to use Marketo RFP for MA Process	How do I do…	Marketo Community Search for Experts	Need a Guide Need a Consultant	Guide Cost Consultant Cost	Guide, then Consultant
Users 1 Year	I'm Stuck How do I?	We need to get this done, but how?	Marketo Community Who can do this? What will it cost?	Could I do it myself? Getting an expert.	Guide Consultant	Both?
Power Users	It would be nice if I didn't have to logon to the Community all the time.	I need a quick reference	Community has it sometimes. It's all over the place.	Do I really need a Guide? Could I do it myself?	The Guide is cheaper than doing this myself.	Guide it is.

Step 3: Convert Questions Into Content Offers

Stages/Buyers	**Loosening Status Quo**	**Committing to Change**	**Exploring Possible Solutions**	**Committing to a Solution**	**Justify the Decision**	**Make the Selection**
New Users	RFP Guide Matrix How to Manage Your Instance	Did you know…	Offer help on the Community	Guide Offer: How Marketers Use Marketo	Cost of Marketo vs. Guide Cost of Guide vs. Consultant	Buy now! New User Discount
Users 1 Year	Marketo Guide Blog Updates	Helpful blog posts, but not too detailed	Offer help on the Community	Learn More Offer	Cost of Marketo vs. Guide Cost of Guide vs. Consultant	Buy Now as a reference—learn something new.
Power Users	Reference Guide Blog Posts with minimal commentary	Reference Guide sell page	Link back to reference articles	Reference Guide Offer	Fast, Quick Reference Possible Reference	Buy Now as a reference.

					Offer	

Ask, "Am I making an offer I would want if I were my target buyer?"

Offers

Now that you have your basic Content and Buyer Grid, you have to craft the offer. The offer will likely involve several assets including the information, which will be helpful to the Buyer.

Asset Creation

You will need an asset for each offer. Here is a quick example of how to deepen your Content Grid to get it done:

Offer	**Email**	**Landing Page**	**Content Page/Thank You**	**Content File (if needed)**
RFP Guide Matrix	Subj: Marketing Automation RFP Guide	Blog Post	None	RFP Matrix File (XLSX)
How to Manage Your Instance	Subj: How to Manage Marketo for Newbies	How to Manage Marketo for Newbies with basic form and image	Download your copy of How to Manage Your Marketo	How to Manage Your Marketo PDF (10 pages)

Preparation Case Study: Elixiter and SAVO Webinar Series

Andrew Hull, President of the demand generation agency Elixiter, has a great case study on the process and results of a 12 part nurturing program with their client SAVO. If you like what you see, contact him and his Marketo Certified Team at +1.406.548.2500. They live in fabulous Bozeman, Montana…very jealous.

The summary of the SAVO webinar program is to plan out what you want to do and then execute. Easy, right?

1. Develop the webinar topic.
2. Identify Content for each webinar.
3. Schedule the process for invitations, reminders, follow-ups, and webinar invitation sign up list.
4. Set a date to start and a schedule for follow up webinars.
5. Build buzz. Get your partners involved too?
6. Test the webinar with the team.
7. Track each webinar.

8. Report on Results.

With Elixiter's help, SAVO was able to achieve a 49.9% acquisition rate, tripled lead flow, and attained 42.9% attendance on average. Better yet, now shows had a 36% open rate for post event emails (very high!) and a61.2% conversion rate for the on-demand landing page.

Channel Type Setup

Nearly everyone I speak with recommends a custom channel for Nurturing. You should consider your goals for the Program and how to structure the Progressions. You may find these examples work well for you, or modifying the names would be better.

See How to Create a Channel in Using Programs for details

Email Blast is a default in Marketo. It works, but it is not ideal except for the most basic campaigns. Note that Statuses of equal rank are set to the same Step Number. This isn't required, but it can be helpful. Remember, that once a Lead Progresses to a Status of a higher Step, it cannot go back.

Progression Status	Step #	Success?	Purpose
Sent	10		The email was sent.
Opened	10		Lead opened email
Clicked	10		Clicked in Email
Converted	20	Yes	Converted. This could be any conversion (to Contact, to Opp, to Won Opp)
Unsubscribed	30		Unsubscribed from an email in this Program.

Nurture Channel is based on what I have created for several firms. I set the Step numbers in this way to ensure that poor outcomes were typically not at the same level as the Promoted outcome.

Progression Status	Step #	Success?	Purpose
Added	10		Just joined.
Not Reachable	20		Bounced.
Delivered	30		Confirmed delivery
Inactive	30		Did not click or open
Viewed Offer	40		Opened or landed on page
Engaged	50		Filled out one form but not success yet.

Progression Status	Step #	Success?	Purpose
Exhausted	70		Did not reach success criteria.
Promoted	70	Yes	Did what we wanted.
Unsubscribed	75		Unsubscribed because of this program.
Removed by Sales	80		Sales removed this person.

Eric Hollebone's Nurture Channel suggestion for more complex systems. You can use this for any Nurture system, but it is designed for use by Traffic Cops.

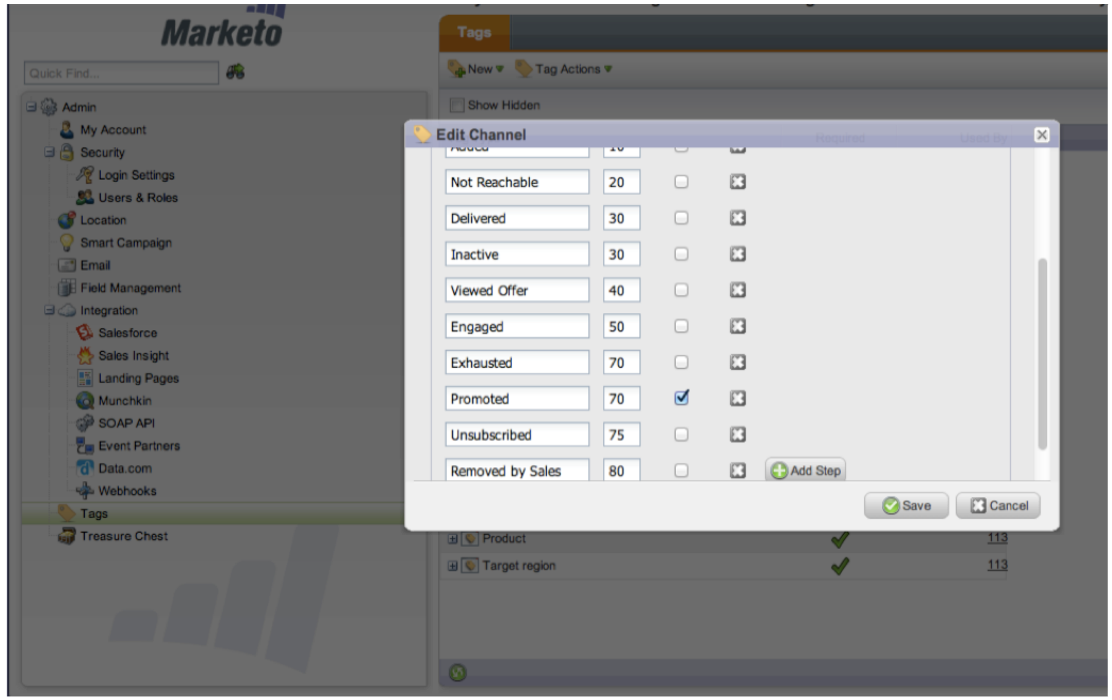
Progression Status	Step #	Success?	Purpose
Added	10		Just added
Nurture Track Assigned	20		On a track
Exhausted	30		Lead ran out with no success
Won Opp	30	Yes	Has Opp, Status=Won

To Setup a Nurture Channel for your Marketo, follow these steps:

Step 1: Admin > Tags > Channel

Step 2: New Channel

Here's where you define the Progressions your team needs. Use the templates above to get started.



Step 3: Save New Channel as Nurture – Basic

Now this Channel will be available whenever you create a new Program.

Nurture Program Template

Now that you have a `Channel Type` setup called `Nurture Basic`, you can create a new Program.

Step 1: Create a Folder in Marketing Activities called Nurturing Programs

Step 2: Create a New Program in Nurturing Programs

Name this Program `Drip Nurture Example`

Step 3: Channel Type = Nurturing Basic

Step 4: Create a New SFDC Campaign

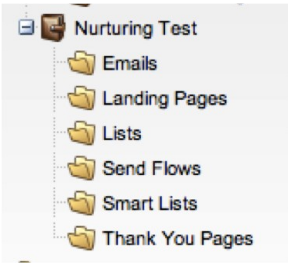
Name the campaign `Drip Nurture Example`.

Step 5: Link the Program to the New SFDC Campaign

Folders

Note: file assets like PDFs will still reside in Design Studio > Images and Files

Now that you have a new Program, you need to organize it because there will be a lot of assets, campaigns, and lists.



- **Emails** – you will keep all emails here.
- **Landing Pages** – all your landing pages go here.
- **Thank You Pages** – any follow up pages go here.
- **Lists** – static lists which will be used as lead buckets
- **Smart Lists** – any smart lists used for this Program
- **Process** – Traffic Cops
- **Send Flows** – the campaigns that actually do the work.
- **Status Flows** – holds specific status changers, like Delivered.

Email Construction

This part is up to you! I will make the following suggestions:

Step 1: Decide on a Naming Scheme

Since each email is inside the Program, a simpler scheme to denote order of emails is probably best.

01 – My First Automation Tool

02 – Setting Up Marketo

If you think you will use a modular system, you may want to include dates:

YYYYMMDD – Offer Fall

YYYYMMDD – Offer Spring

Step 2: Make Each Email Offer Unique

Don't just clone the email and change the subject. You are here to make revenue, so create new offers, use different email templates, and show people you are serious about your expertise.

Landing Page Construction

Step 1: Decide on a Naming Scheme

For landing pages, you can follow the email-naming scheme for the corresponding CTA. Whatever you do, be sure to match the Marketo Page Names and Email Names so you can keep track. Trust me, it will be hard to watch all of this as you program the flow steps.

Step 2: Make Each Offer Unique

Again, match each page to each email offer. Feel free to use your standard layouts.

Traffic Cops, Gatekeepers, and Sister Campaigns

What drives a nurturing program? It's the custom business rules, which decide when, and how, a Lead can start receiving the offers you created.

Marketo devised a system of Smart Campaigns it calls the Traffic Cop system to help you manage Leads flowing through different tracks. The Traffic Cop works by evaluating several conditions and passing the Lead to the next Gatekeeper before the Lead moves into the Send track.

The two best presentations are from Chris Russell and Eric Hollebone. I highly recommend you review both, as my description is a high level overview of what they describe.

Traffic Cop Campaigns

This listens for changing conditions in a Lead and will decide which Nurturing Campaign to Call. There is only one Traffic Cop per system. In fact, some firms use a Master Control for all Lead flow.

Step 1: Smart List

Triggers off of any relevant changes such as Revenue Stage, Added to List, Opportunity, Data Value.

Step 2: Flow Action

Request Campaign will request the highest value Campaign that the Lead qualifies for. This is driven by Smart Lists.

Step 3: Schedule

Active

Gatekeeper Campaigns

The Traffic Cop calls the Gatekeeper. The Gatekeeper's job is to check if the Lead is already in this nurturing track. If it is, then it does not trigger.

If the Lead should go into this track, the Lead is stamped with the Nurturing Track Field and will start to receive emails.

Nurturing Send Flow

If the Lead is in the email flow and will receive the emails until the Lead is either Removed from Flow or Exhausted. Some systems will call a separate Wait Campaign that will wait between each email.

Wait Step Processing

Will check to see if the Lead still belongs to this nurturing campaign. If it does not, it will Remove the Lead and send it back to the Gatekeeper.

Basic Drip Nurture

Before there was nurturing, there was the Drip Campaign. A simple multi-email flow triggered by an initial action (like a newsletter sign up) and then sends perhaps 6-10 emails over a period of weeks. People who engage these offers are usually your best prospects.

Setup and Structure

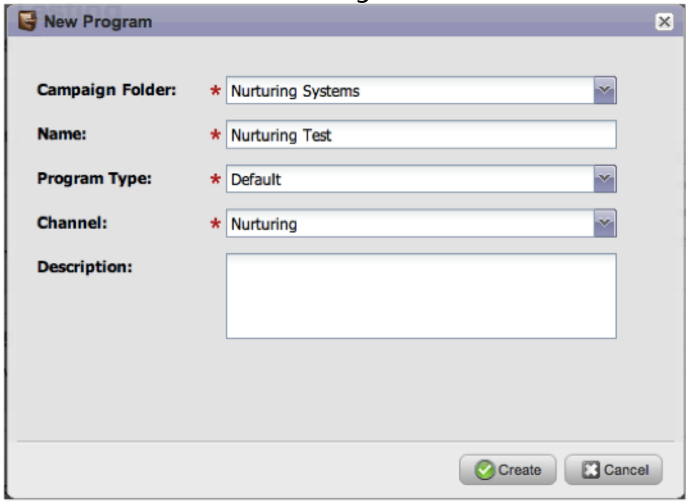
In Marketo, such a drip campaign is very easy to setup:

1. Email Offer
2. Landing Pages

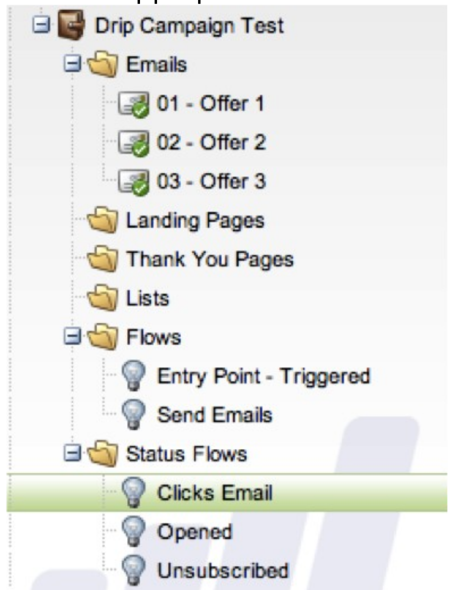
3. Thank You Pages
4. Trigger Entry Point (or batch)
5. Single Send Email Flow with Wait Steps.

How To Drip

Step 1: Create a New Email Blast Program



Step 2: Create the appropriate Folders



Step 3: Add Emails

Remember to name them in order so Marketo sorts them properly too.

Step 4: Approve Emails

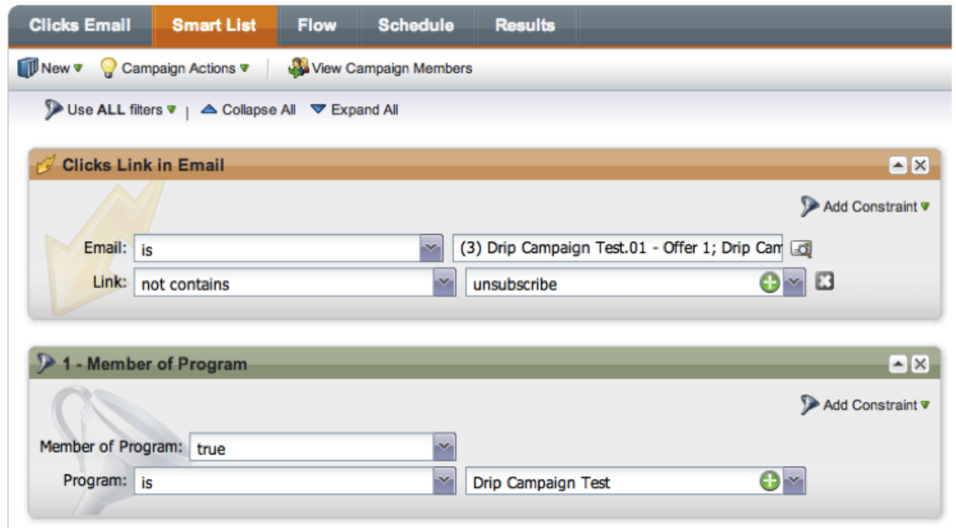
Test and approve the emails first because you will need to plug them into the Campaign flows later.

Step 5: Add Landing Pages

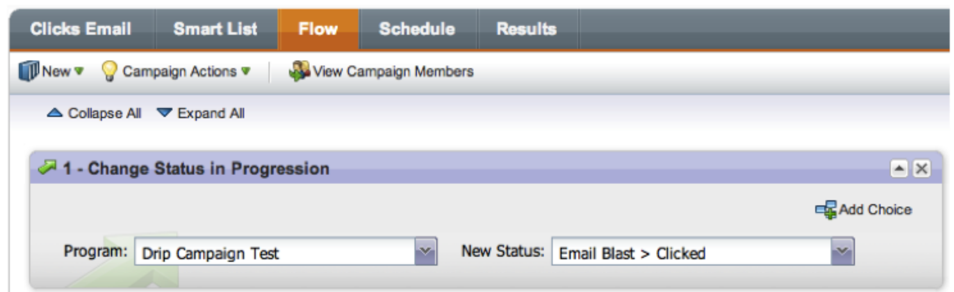
If you have Landing Pages, test and approve those now.

Step 6: Add Status Progression Listen Campaigns

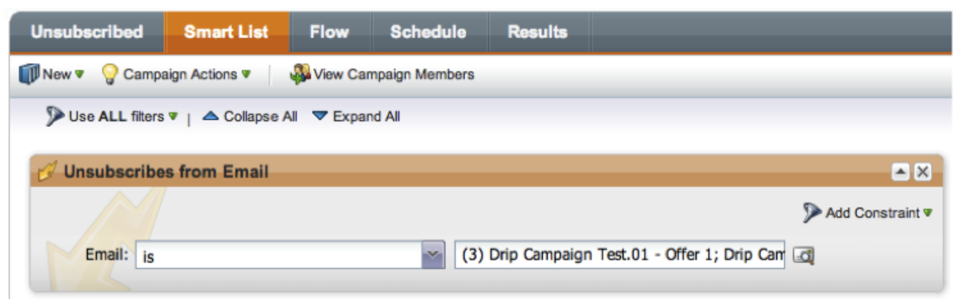
Progressions don't just happen. You make them happen. In this Program, I have a folder called Status Flows with Clicks Email, Opened, and Unsubscribed which all trigger from the corresponding action. It is usually best to have a filter here which checks to see if the Lead is a Member of this Program, otherwise you could risk triggering off the action of a non-Member lead.



Flow:

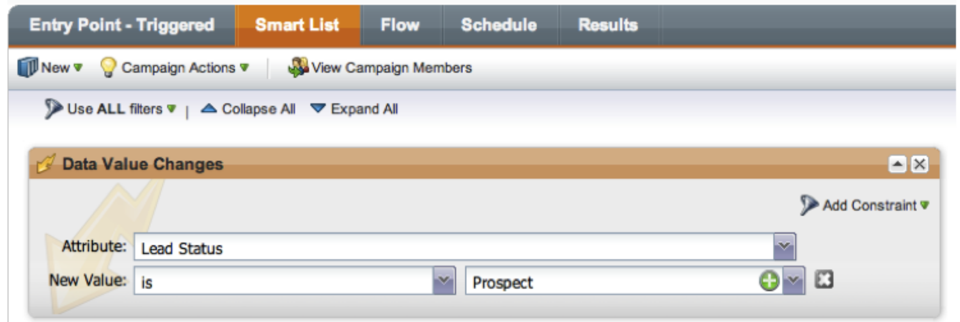


Likewise for Unsubscribes:



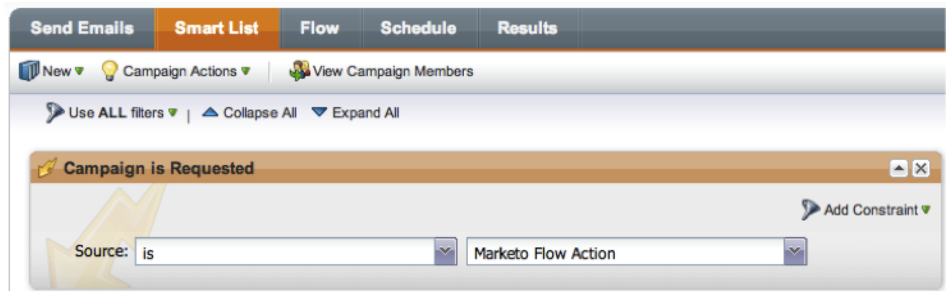
Step 7: Add Entry Point Campaign

You need a way to kick-start the campaign. You can always run this as a batch campaign or as a triggered campaign. In this case, we want this campaign to trigger on a Lead Status change.

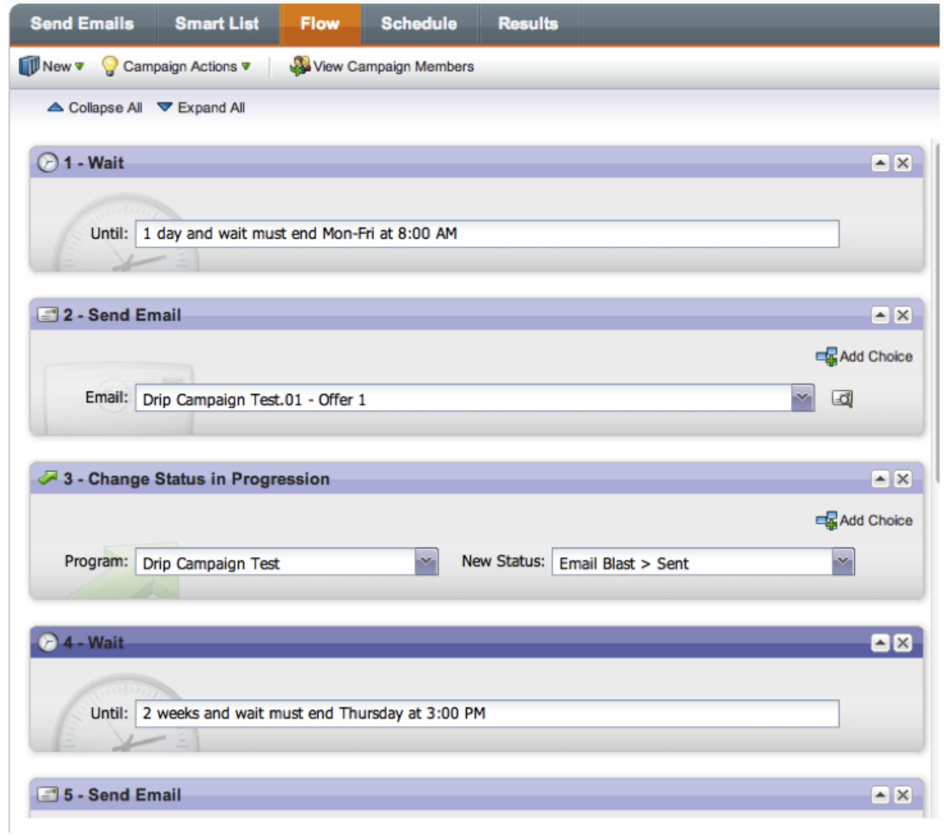


Step 8: Add Send Emails flow campaign

This `Campaign is Requested` by the Entry Point:

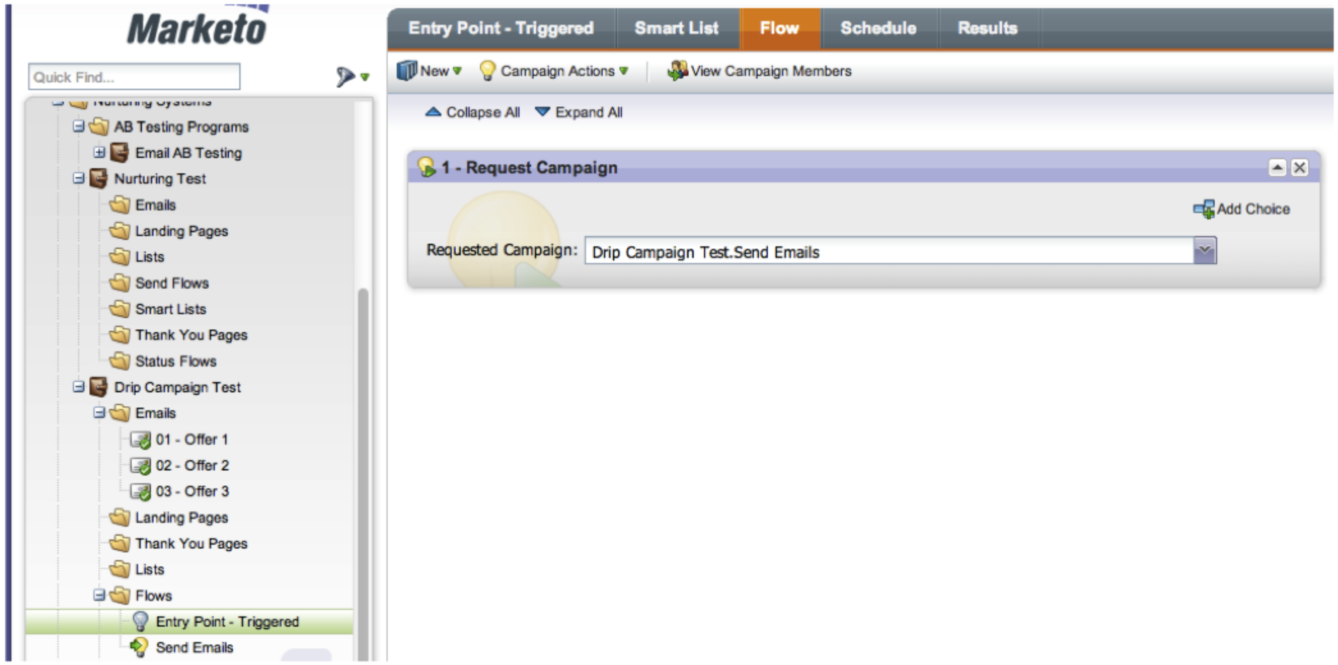


The Flow is a series of alternating Wait Steps with Duration to ensure the email goes out at the preferred time. Remember, this is based on your System Time.



Step 9: Add Send Emails Flow to Request Campaign in Entry Point

Once the Send Email Campaign is Activated, you must place it in the Entry Point Flow:



Then Activate the Entry Point Campaign.

A Detour on AB Testing

AB Testing is possible on any flow with emails or landing pages. It does become a bit more complicated as your tracks and offers multiply, so plan it out. I recommend examining Robbie Mitchell's Modular Nurture System in the next section for details on how to manage these better.

AB Test Emails in Nurture

You can absolutely test emails in any nurture system. How you do this will depend on what you want to test, how to change it, and how to report on it.

It is easier to have the `Send Email Choice Step` Method using `Random Sample` with two or more emails per step. Please see more in AB Testing Emails.

AB Test Landing Pages in Nurture

Since Landing Pages can use the AB Testing Group feature, it is far easier to test pages than emails in nurture. During construction, make sure you setup each offer page as a Test Group. Then Clone each page, add to the Group, and modify the B page as appropriate.

Set a goal of checking in on these pages every 2 weeks with changes every 4-8 weeks.

Each change clones the winning page, make a new change, and then deactivate the losing page. Your naming scheme is critical here so you can keep track of old, new, winners, and losers.

Modular Drip

Contributor: Robbie Mitchell who published this on the Marketo Community. For questions on this approach, please email him: marketo@robbiemitchell.com. I used his instructions to develop the following Steps. Be sure to visit his link to see how he did it in the original.

I consider this advanced because the setup requires a solid understanding of the components involved and how to move them around. Many thanks to Robbie for the images and instructions.

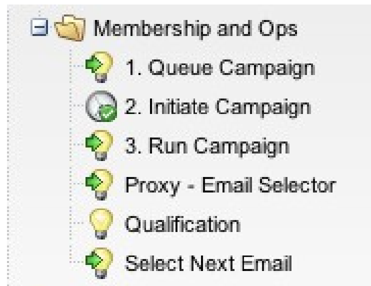
Principles of Modular Drip

- Each nurture email is contained in its own Smart Campaign, which provides control and clear reporting via the Email Performance Report.
- Use Queuing to smooth out the kickoff.
- Separate the nurturing timing from the Content Selection to provide control over changes.
- Use a proxy campaign to connect the structure to the content.

Smart Campaigns

Step 1: Queue Campaign

This is the campaign that other campaigns request when they initiate the email. This adds Leads to a List called `Drip Queue`.



Step 2: Initiate Campaign

Once a day, Monday through Friday, this campaign looks for anyone who was added to Drip Queue List in the past 3 days and requests the next Campaign, Run Campaign. Three days is used because of Friday-Sunday.

Step 3: Run Campaign

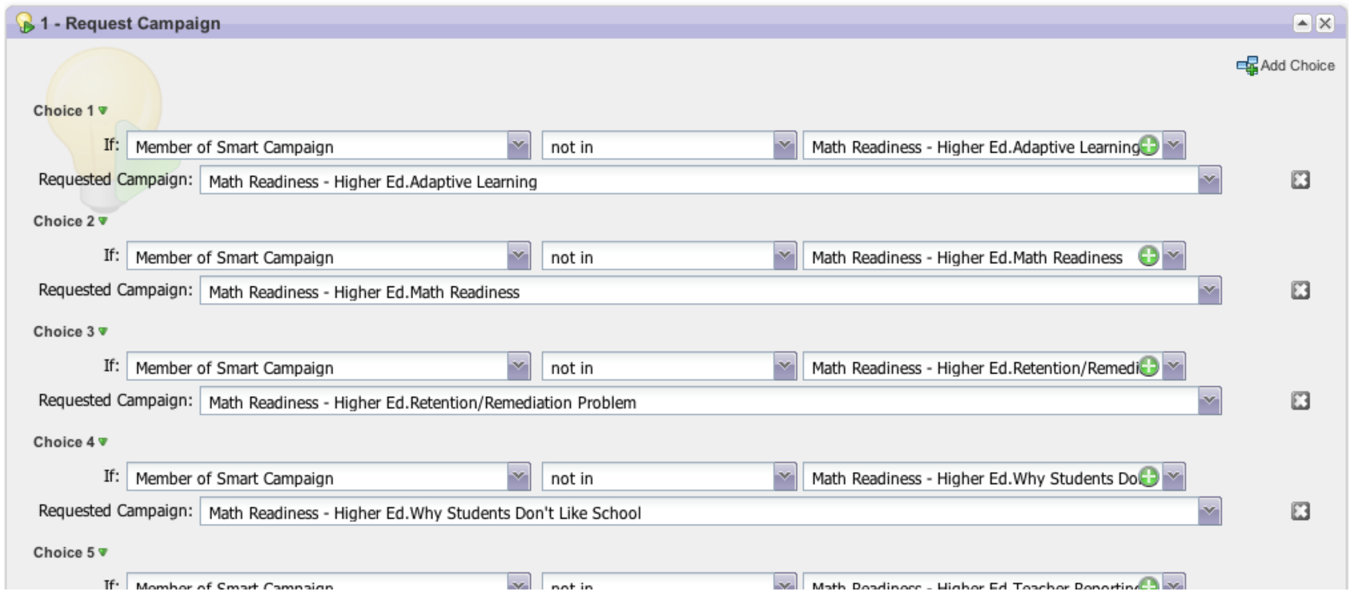
This campaign runs the nurture timing.

Step 4: Proxy – the Email Selector

This campaign requests other campaigns, providing a single destination for the requestors. This allows you to select specific emails to send.

Step 5: Select Next Email

This campaign decides which email to send. It uses the Choice order to avoid previously joined Campaigns.

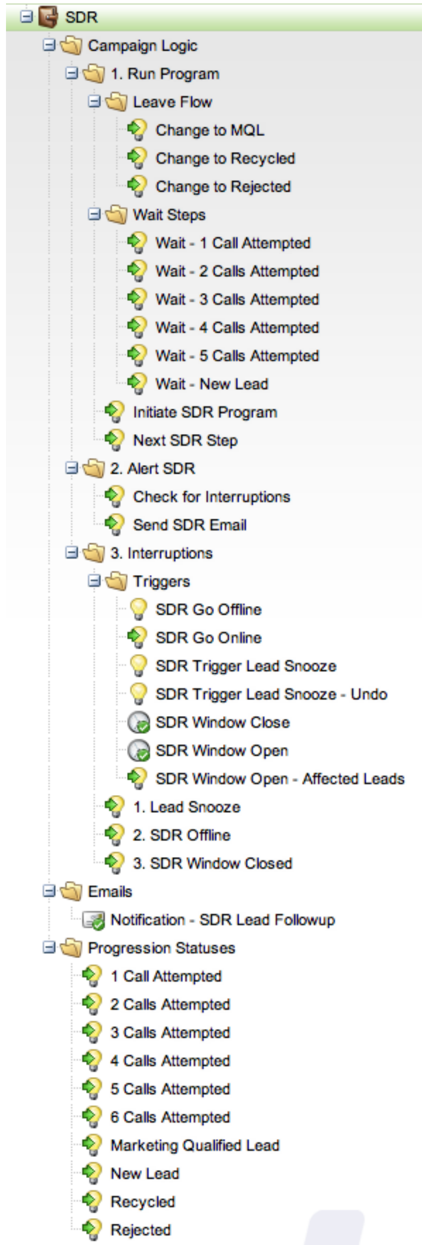


As you can see, using separate campaigns like this allows you to swap out emails more easily, permitting re-ordering, removals, or additions at any time. As Robbie notes, this also avoids double sends or skips. Any errors will be self-healing, as the system will return to try it again later.

Sales Development Rep Alert System

Robbie has also developed a [SDR alert system] designed for optimal follow up based on Marketo’s best practices. He details this very interesting system on the site.

He did such a great job, I’ll let his work speak for itself. Not convinced it’s for you? Take a look at the structure:


SDR
Campaign Logic
1. Run Program
Leave Flow
Change to MQL
Change to Recycled
Change to Rejected
Wait Steps
Wait - 1 Call Attempted
Wait - 2 Calls Attempted
Wait - 3 Calls Attempted
Wait - 4 Calls Attempted
Wait - 5 Calls Attempted
Wait - New Lead
Initiate SDR Program
Next SDR Step
2. Alert SDR
Check for Interruptions
Send SDR Email
3. Interruptions
Triggers
SDR Go Offline
SDR Go Online
SDR Trigger Lead Snooze
SDR Trigger Lead Snooze - Undo
SDR Window Close
SDR Window Open
SDR Window Open - Affected Leads
1. Lead Snooze
2. SDR Offline
3. SDR Window Closed
Emails
Notification - SDR Lead Followup
Progression Statuses
1 Call Attempted
2 Calls Attempted
3 Calls Attempted
4 Calls Attempted
5 Calls Attempted
6 Calls Attempted
Marketing Qualified Lead
New Lead
Recycled
Rejected

Double Loop Nurture

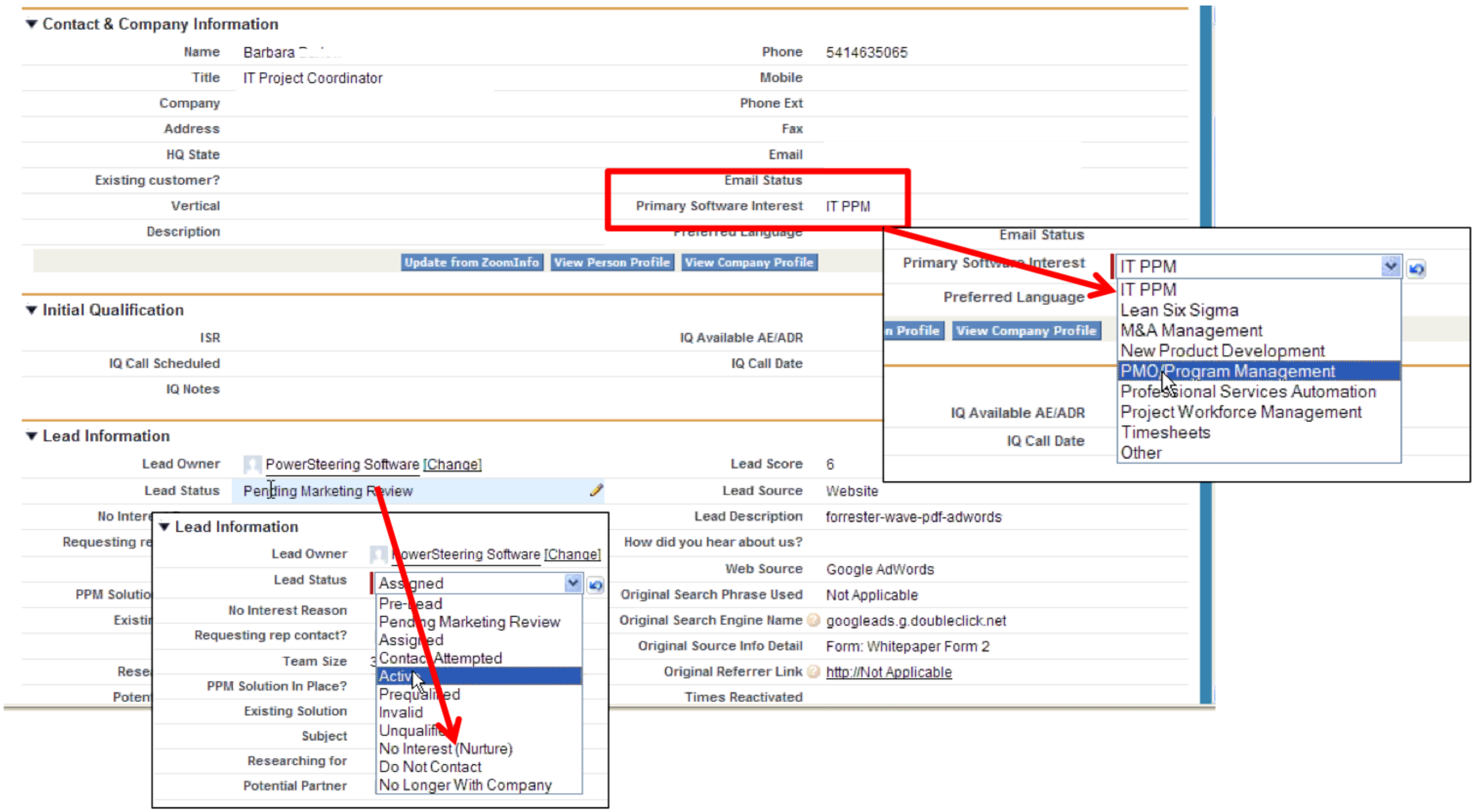
Contributor: Matt Barnett, Vice President of Marketing at PowerSteering Software. For questions on this approach, email Matt at mbarnett@psteering.com or me, since I used to work for him!

I call this the Double Loop Nurture because that is what it does. For each Nurture track, there are two drip loops: A and B, which continually feed leads to each other. When a lead is done with A, it goes to B, then back to A.

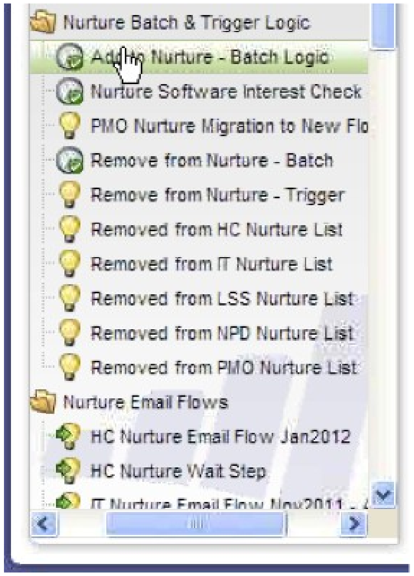
Matt's goal was to create an automatic drip campaign with flexibility to update email content at any time. Having helped Matt with this directly, I can say this does work well. The main drawback of this system is that Leads end up in the Nurturing Track more than once, where they receive the same content.

Setup

You need tracks based on a Product Interest field. In this case, the `Product Interest` field pick list is required in Salesforce whenever an Inside Sales Rep (ISR) creates a lead.



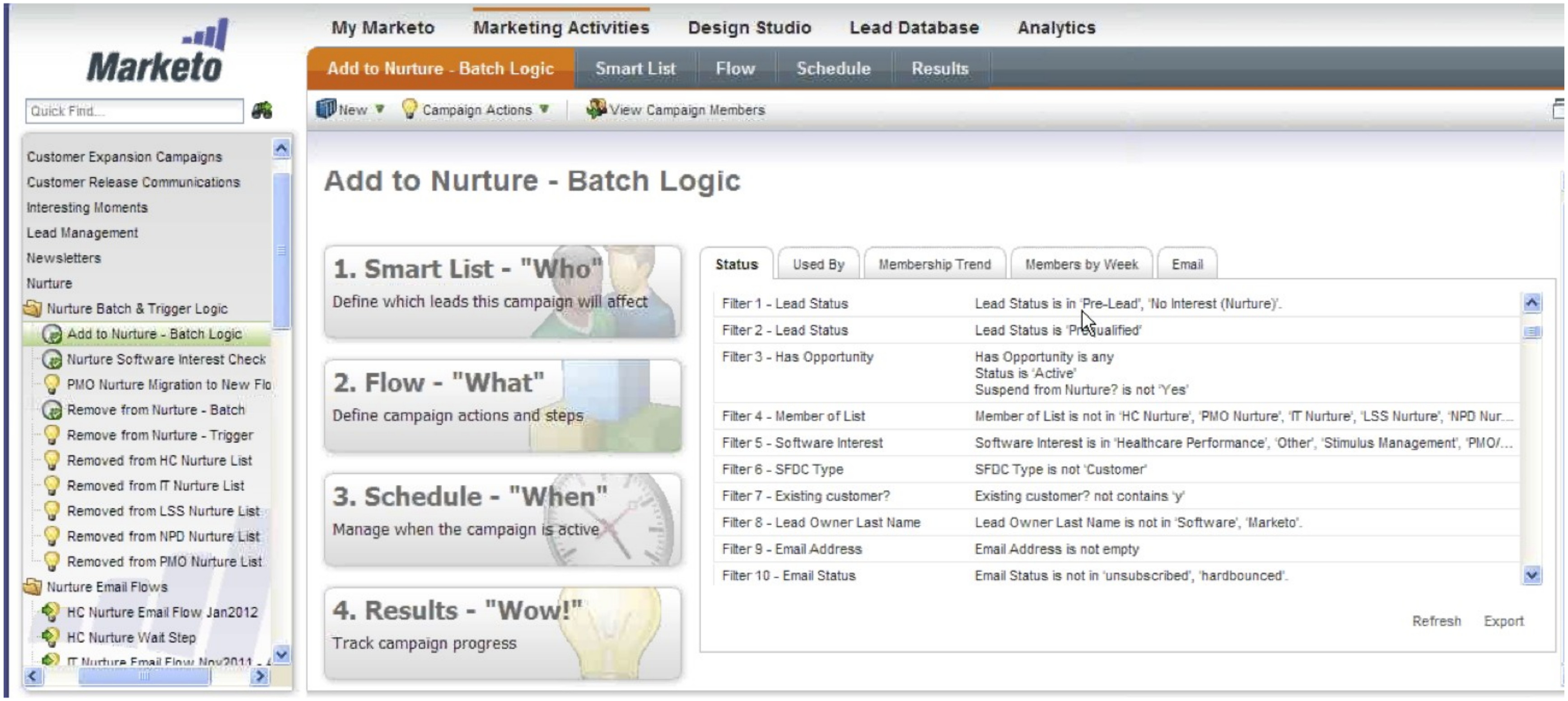
It is helpful to see some of the structure of this system:

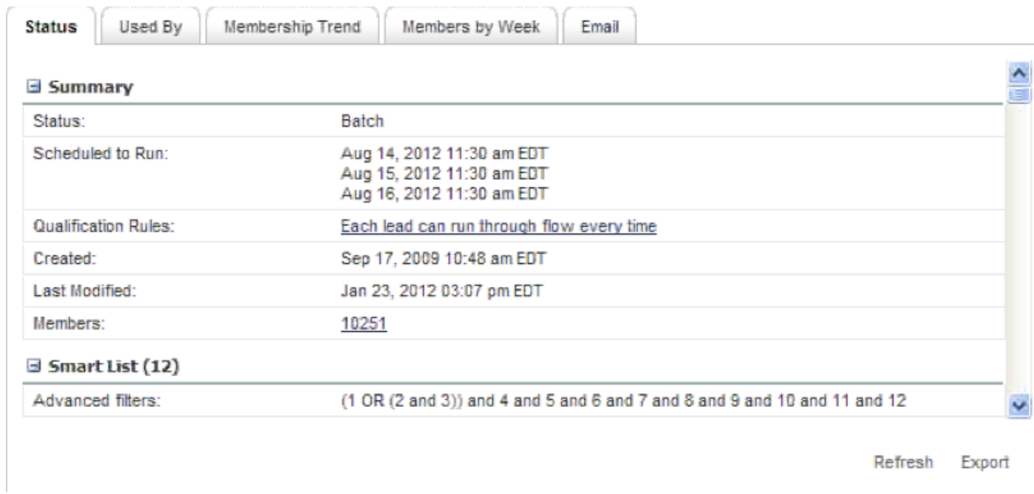


Entry Methods

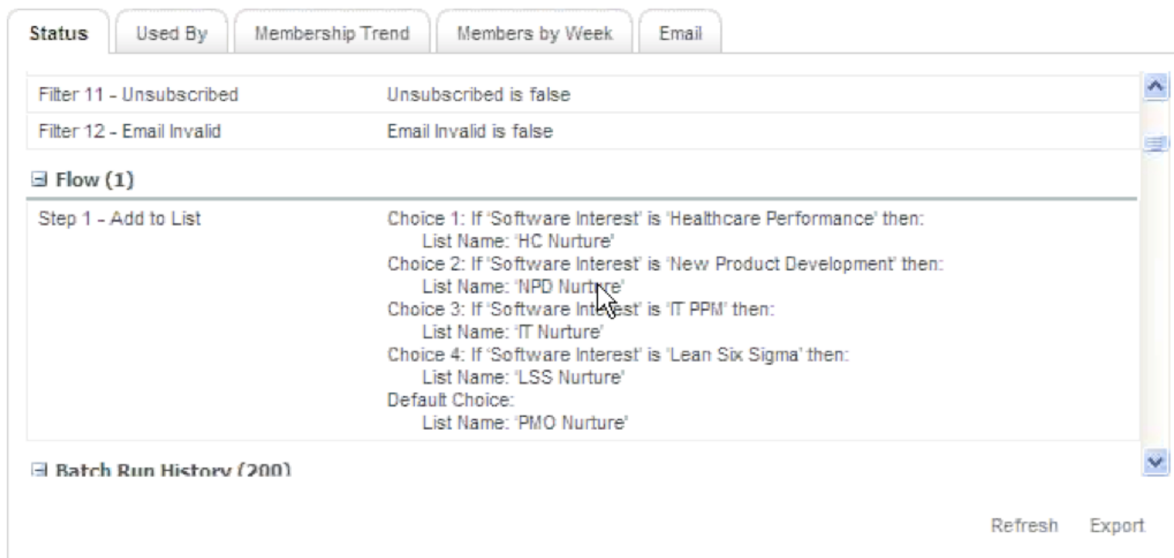
Batch entry runs only on Tuesday, Wednesday, and Thursday and at certain times such that the emails do not go out during poor times or weekends. This works because the Wait Step runs 2 weeks, so they always get an email at the same time and day.

Lead Status	What Happens	Trigger
No Interest/Nurture	Enter	Data Value Changes to No Interest/Nurture Not Unsubscribed Not Invalid or Bounced Not Currently in Nurturing


Marketo
My Marketo
Marketing Activities
Design Studio
Lead Database
Analytics
Add to Nurture - Batch Logic
Smart List
Flow
Schedule
Results
Quick Find...
New
Campaign Actions
View Campaign Members
Customer Expansion Campaigns
Customer Release Communications
Interesting Moments
Lead Management
Newsletters
Nurture
Nurture Batch & Trigger Logic
Add to Nurture - Batch Logic
Nurture Software Interest Check
PMO Nurture Migration to New Flo
Remove from Nurture - Batch
Remove from Nurture - Trigger
Removed from HC Nurture List
Removed from IT Nurture List
Removed from LSS Nurture List
Removed from NPD Nurture List
Removed from PMO Nurture List
Nurture Email Flows
HC Nurture Email Flow Jan2012
HC Nurture Wait Step
Add to Nurture - Batch Logic
1. Smart List - "Who"
Define which leads this campaign will affect
2. Flow - "What"
Define campaign actions and steps
3. Schedule - "When"
Manage when the campaign is active
4. Results - "Wow!"
Track campaign progress
Status
Used By
Membership Trend
Members by Week
Email
Filter 1 - Lead Status
Lead Status is in 'Pre-Lead', 'No Interest (Nurture)'.
Filter 2 - Lead Status
Lead Status is 'Prequalified'
Filter 3 - Has Opportunity
Has Opportunity is any
Status is 'Active'
Suspend from Nurture? is not 'Yes'
Filter 4 - Member of List
Member of List is not in 'HC Nurture', 'PMO Nurture', 'IT Nurture', 'LSS Nurture', 'NPD Nur...
Filter 5 - Software Interest
Software Interest is in 'Healthcare Performance', 'Other', 'Stimulus Management', 'PMO/...
Filter 6 - SFDC Type
SFDC Type is not 'Customer'
Filter 7 - Existing customer?
Existing customer? not contains 'y'
Filter 8 - Lead Owner Last Name
Lead Owner Last Name is not in 'Software', 'Marketo'.
Filter 9 - Email Address
Email Address is not empty
Filter 10 - Email Status
Email Status is not in 'unsubscribed', 'hardbounced'.
Refresh
Export



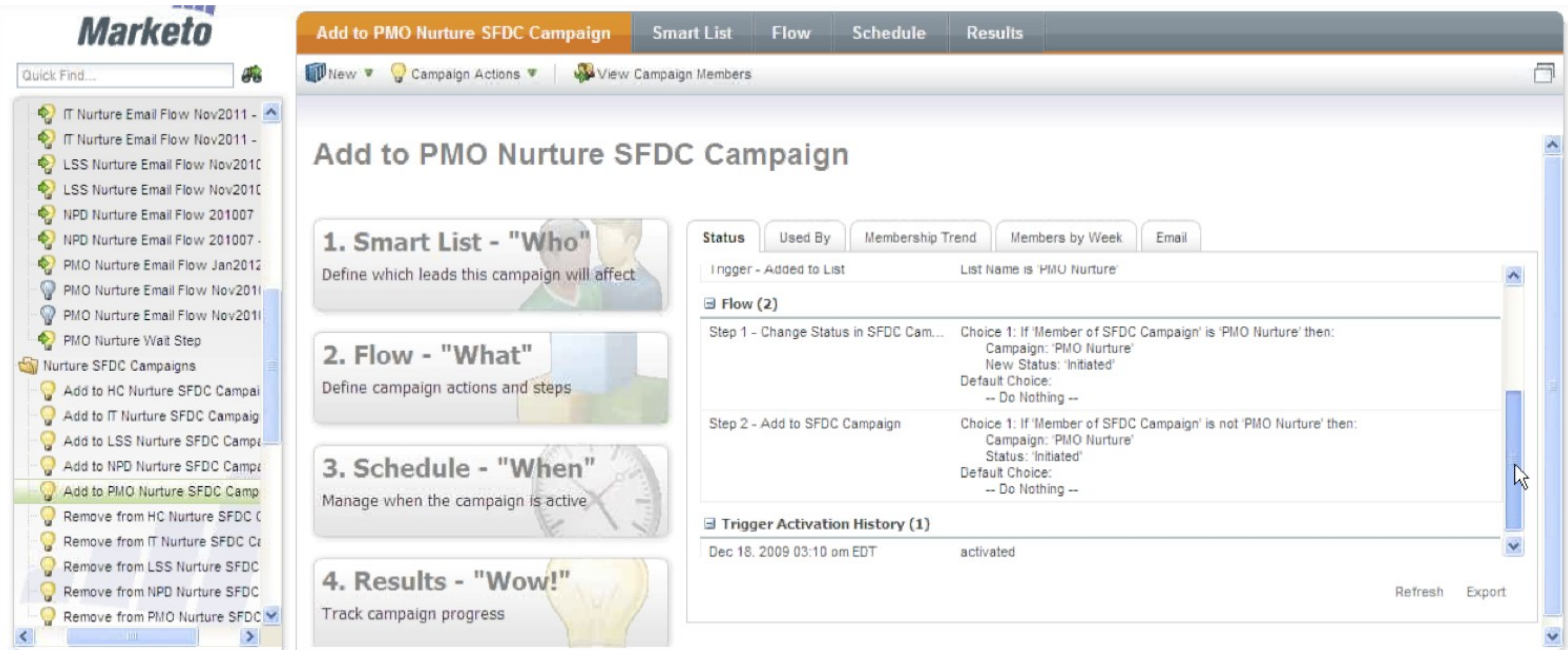
The `Add to Nurture Batch` then assigns each lead to a List so that other campaigns can watch for changes and verify the Lead still qualifies for the emails.



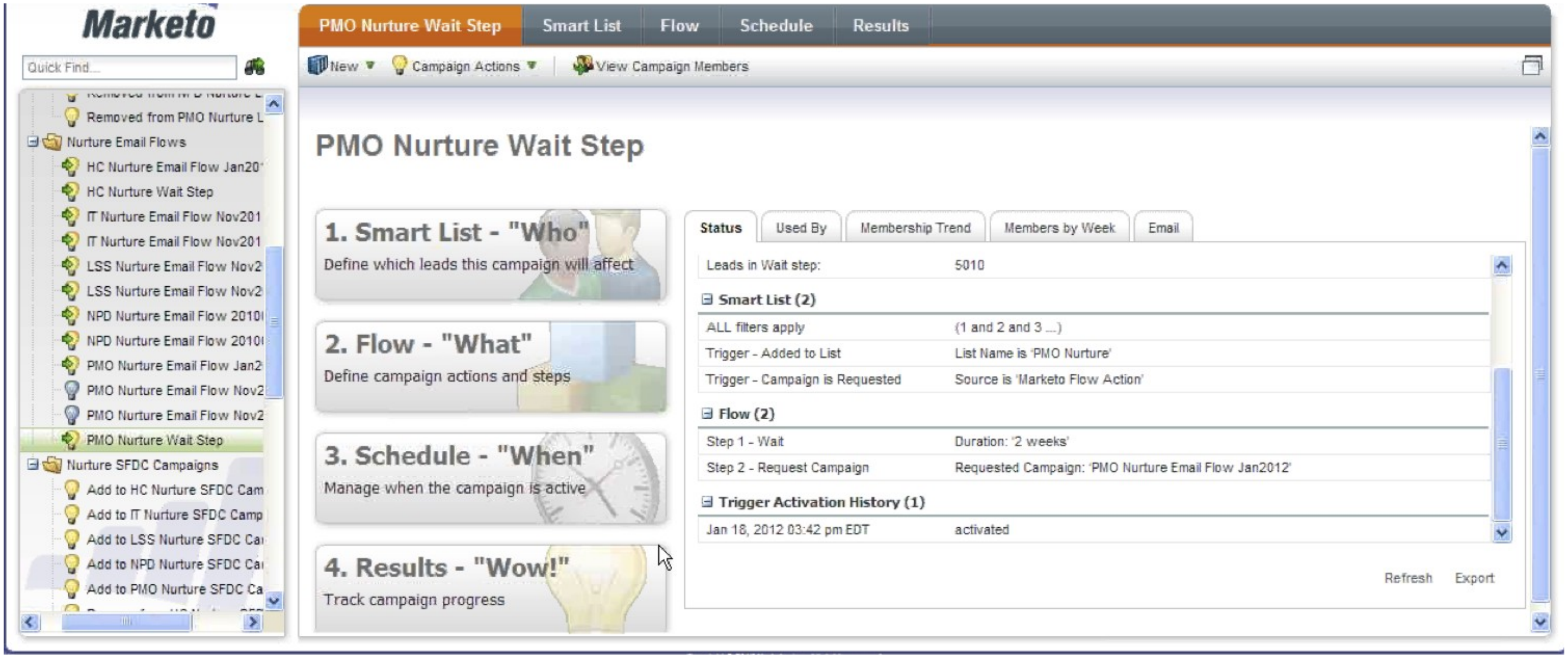
Flow

There are 12 Send Email Flows, 2 for each Product Interest Track. In this case, each Flow has about 6 emails with various content matched to the buying stage.

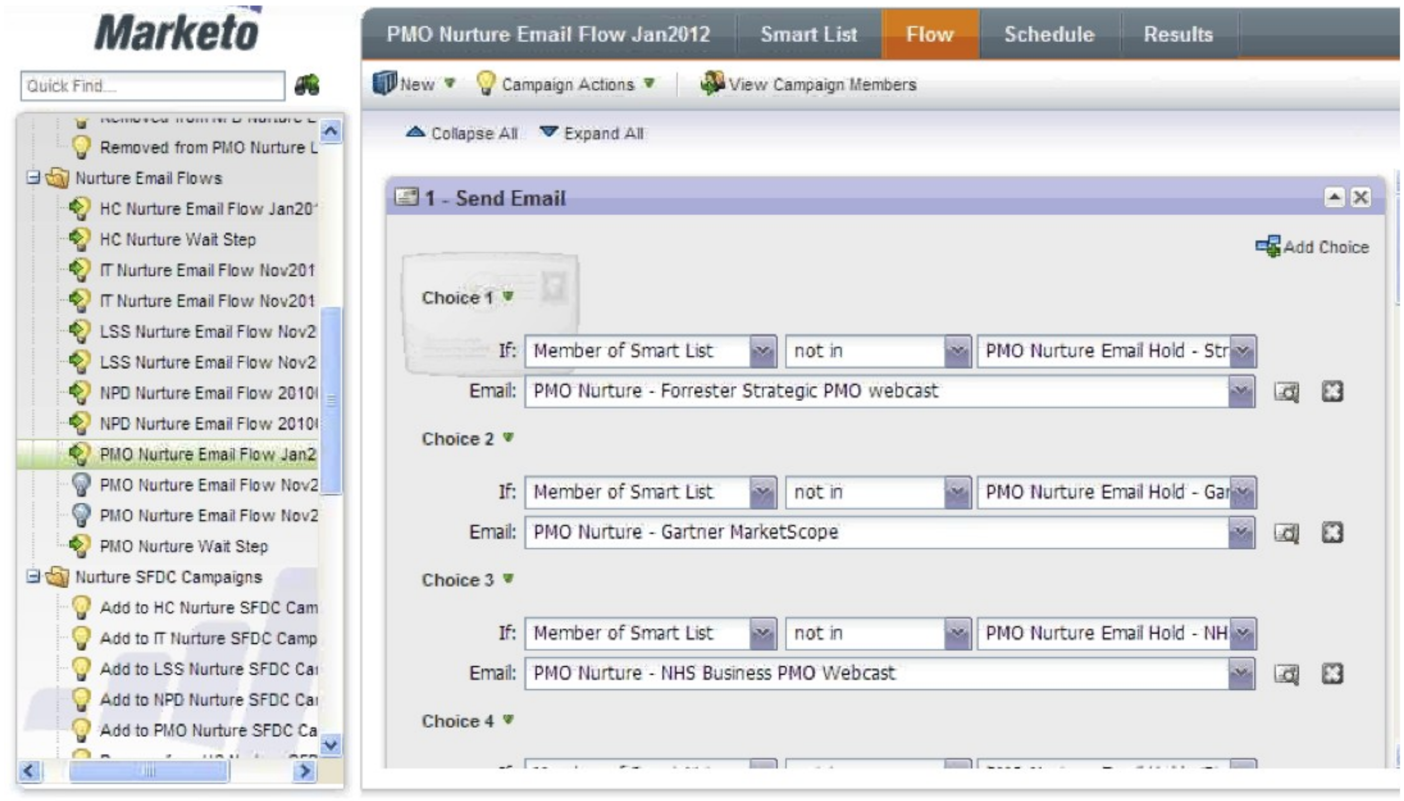
Once the Lead is Added to List, the `Add to [Product Interest] SFDC Campaign` is activated.



Then the [Product Interest] Wait Step kicks in, which then Requests the appropriate Nurture Email Flow as show above.


Marketo
Quick Find...
Removed from PMO Nurture L
Nurture Email Flows
HC Nurture Email Flow Jan20
HC Nurture Wait Step
IT Nurture Email Flow Nov201
IT Nurture Email Flow Nov201
LSS Nurture Email Flow Nov2
LSS Nurture Email Flow Nov2
NPD Nurture Email Flow 2010
NPD Nurture Email Flow 2010
PMO Nurture Email Flow Jan2
PMO Nurture Email Flow Nov2
PMO Nurture Email Flow Nov2
PMO Nurture Wait Step
Nurture SFDC Campaigns
Add to HC Nurture SFDC Cam
Add to IT Nurture SFDC Camp
Add to LSS Nurture SFDC Ca
Add to NPD Nurture SFDC Ca
Add to PMO Nurture SFDC Ca
PMO Nurture Wait Step
Smart List
Flow
Schedule
Results
New
Campaign Actions
View Campaign Members
PMO Nurture Wait Step
1. Smart List - "Who"
Define which leads this campaign will affect
2. Flow - "What"
Define campaign actions and steps
3. Schedule - "When"
Manage when the campaign is active
4. Results - "Wow!"
Track campaign progress
Status
Used By
Membership Trend
Members by Week
Email
Leads in Wait step: 5010
Smart List (2)
ALL filters apply (1 and 2 and 3 ...)
Trigger - Added to List List Name is 'PMO Nurture'
Trigger - Campaign is Requested Source is 'Marketo Flow Action'
Flow (2)
Step 1 - Wait Duration: '2 weeks'
Step 2 - Request Campaign Requested Campaign: 'PMO Nurture Email Flow Jan2012'
Trigger Activation History (1)
Jan 18, 2012 03:42 pm EDT activated
Refresh
Export

The Wait Step waits 2 Weeks, then Requests the Email Flow for that Lead's Product Interest:



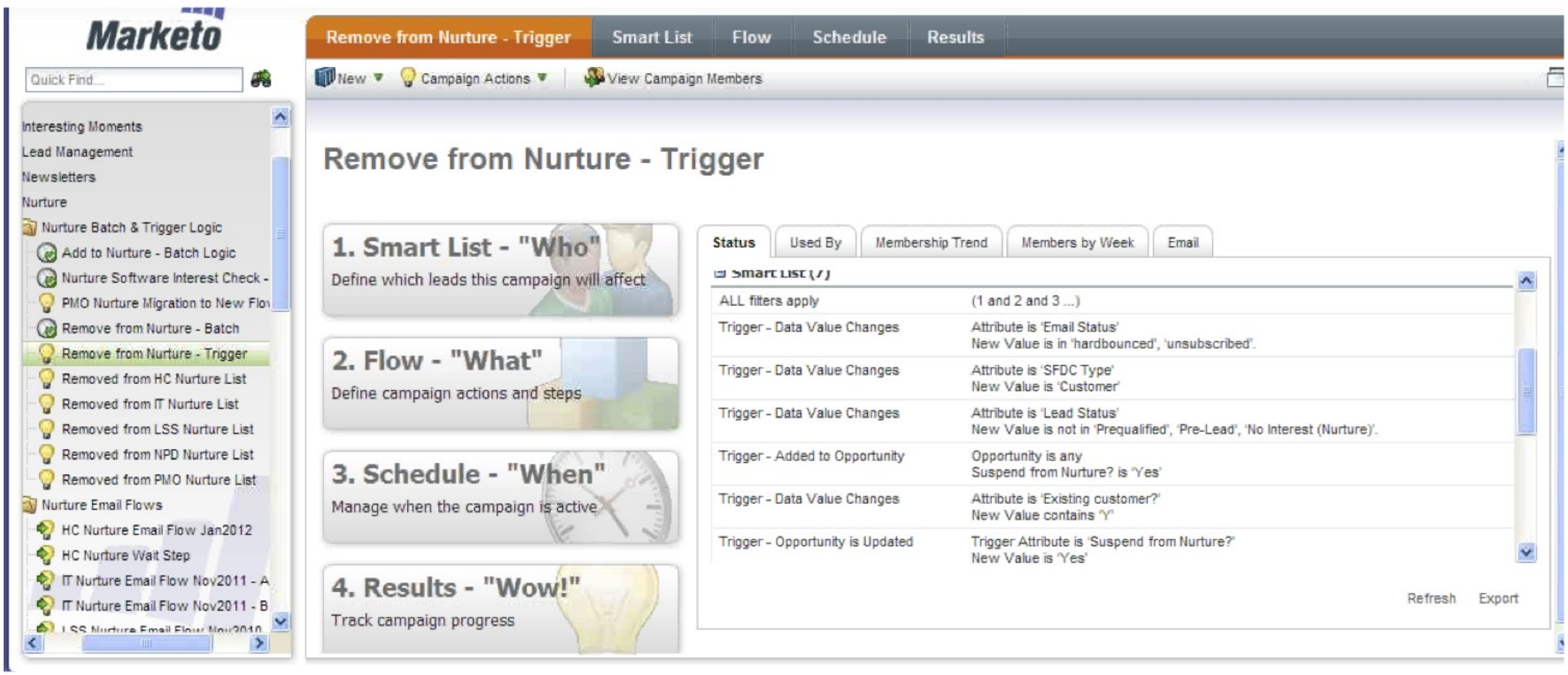
This Flow is set to not send any email the Lead previously received. A series of Smart Lists for each email uses the `Was Sent Email` filter to collect any Lead that was previously sent the email in the past 4 weeks. The Flow will then Request PMO Nurture Wait Step to wait another 2 weeks between emails, then send the next email that the Lead has not yet received.

Exit

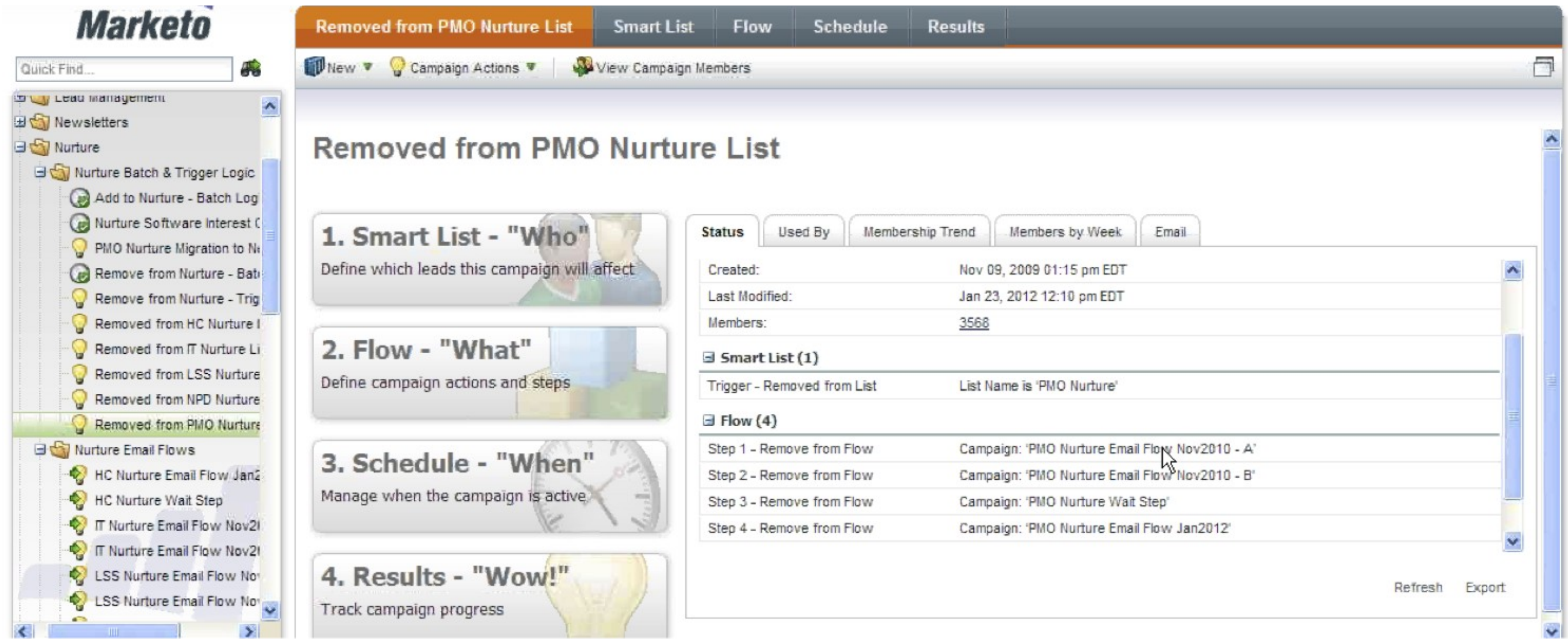
To exit the Flow, Matt setup three options:

- **Batch Daily**: if any changes in a Lead would disqualify that Lead from Nurturing, they are removed. This checks for Member of List, Lead Status IS NOT "Nurture", and Removed from List.
- **Remove Nurture Trigger**: if any of the Data Values Change, the Lead is removed: Lead Status, Email Invalid=True, Opportunity Is Created.
- **Lead Scoring**: when entering the Nurture flows, the Lead Score=0. When the Score reaches 10, the Lead Status is set to Assigned and a Sales Alert is sent to the Lead Owner.

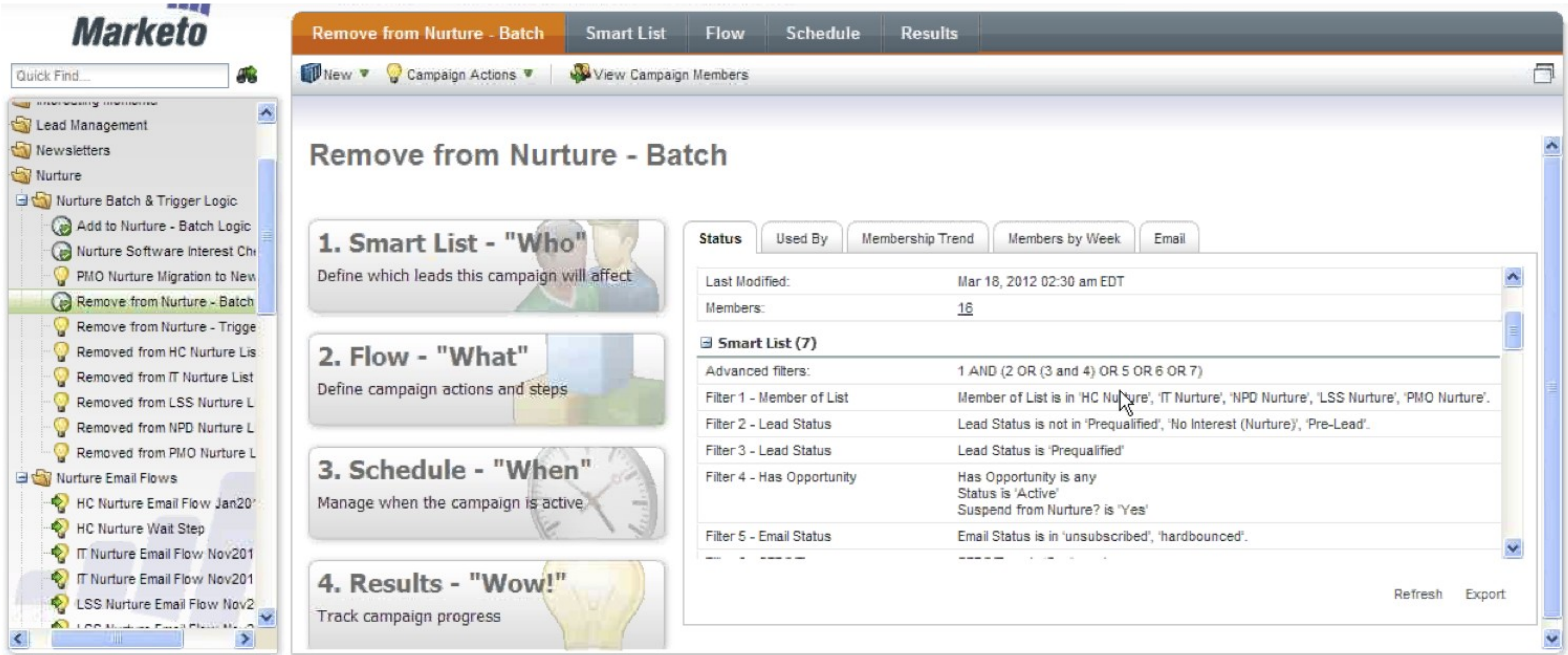
The `Remove from Nurture – Trigger` campaign listens for changes in qualification criteria. If a Lead no longer qualifies, it is removed from the Nurturing Programs.



If a Lead leaves the PMO Nurture List (or other nurturing Static List), then it no longer qualifies, so it is removed from the Send Email Flows and the Wait Step flow.



A separate batch Campaign, `Remove from Nurture – Batch` also checks for changes in Status, Opportunities, and Email validity, then removes the Lead from the nurturing tracks.



Reporting

The main report looks at Added by Track, Removed by Track, and the Total in Nurture. Matt also tracks CTR, Form Conversions, and Unsubscribes from the Emails in the flow.

You could also track by `SFDC Campaign Member Status` or `Primary Campaign Source`.

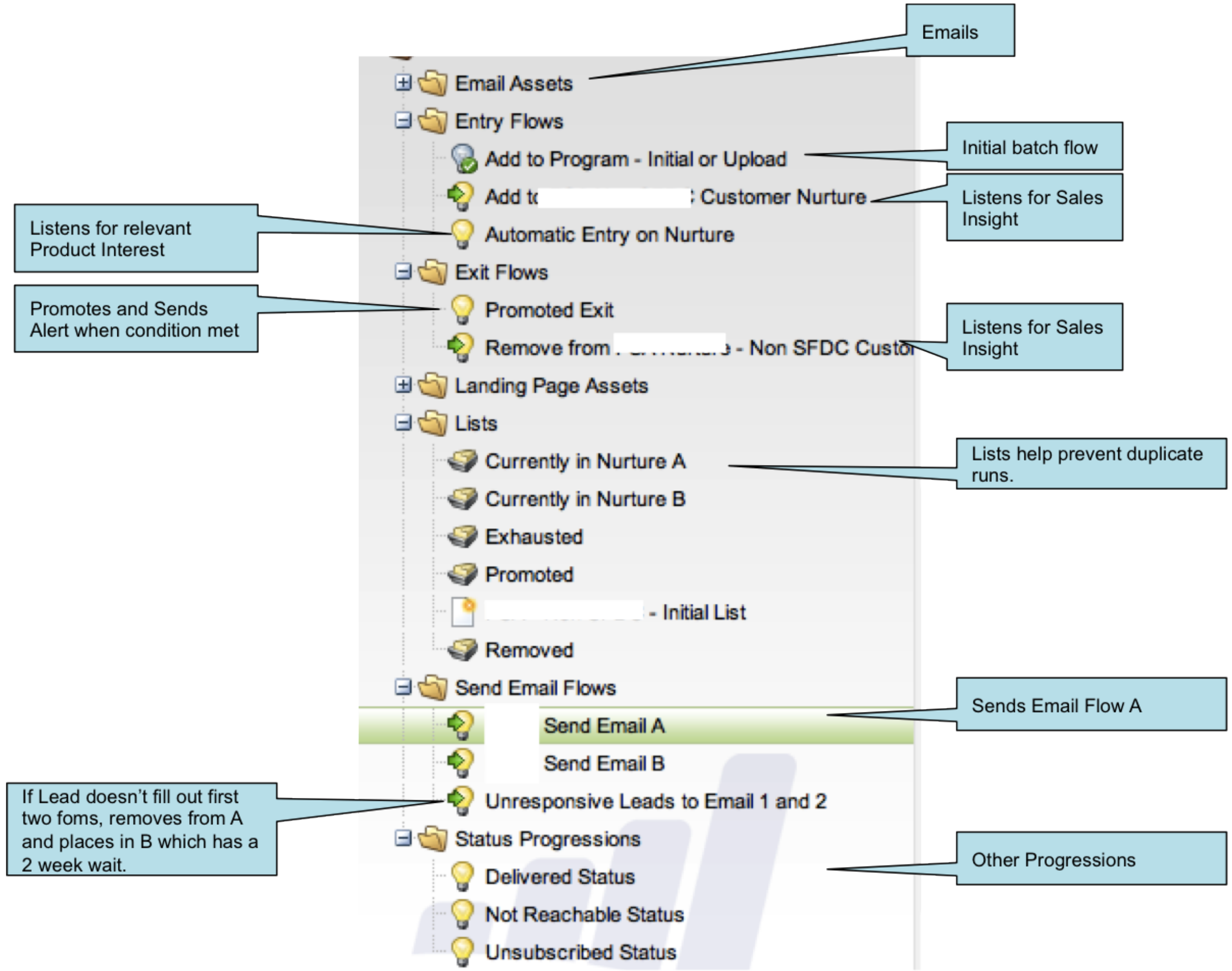
Reactivations: since a Lead can end up in Nurture more than once, he uses a field called `Times Reactivated`, with a +1 for each reactivation.

Semi-Traffic Cop Nurture

I developed this nurturing system for a client who had unique requirements for the Exit conditions.

Entry Conditions	Exit Conditions	Other Requirements
Product Interest is X Inactive for more than 180 days.	-Lead fills out 2 forms (Success) OR -Exhausted OR -Unsubscribed OR -Removed by Sales (via Sales Insight) *In practice, if the lead did not fill out these two forms, they never would.	Sales can activate or remove a lead at any time. If Lead does not react to first 2 offers, wait 2 weeks, then continue next 4 offers.

Here's what the final system looked like:



Some notes about how this works:

- Initial `Add to Program` was based on the `Automatic Entry on Nurture` with the same conditions, but it required a batch to Add because the automatic one was based on a trigger.

- Because of the requirement to change time frames if a Lead failed to respond to the first two emails, I had to create an `Unresponsive Leads to Email 1 and 2` campaigns. This is a `Campaign is Requested` trigger which is called during Send Email A and right before the third email. If the Lead meets certain conditions, then the Lead is Removed from Send Email A and placed in Email B.
- Send Email B has a 2-week wait before sending the next 4 emails.

Multi-Track Nurturing

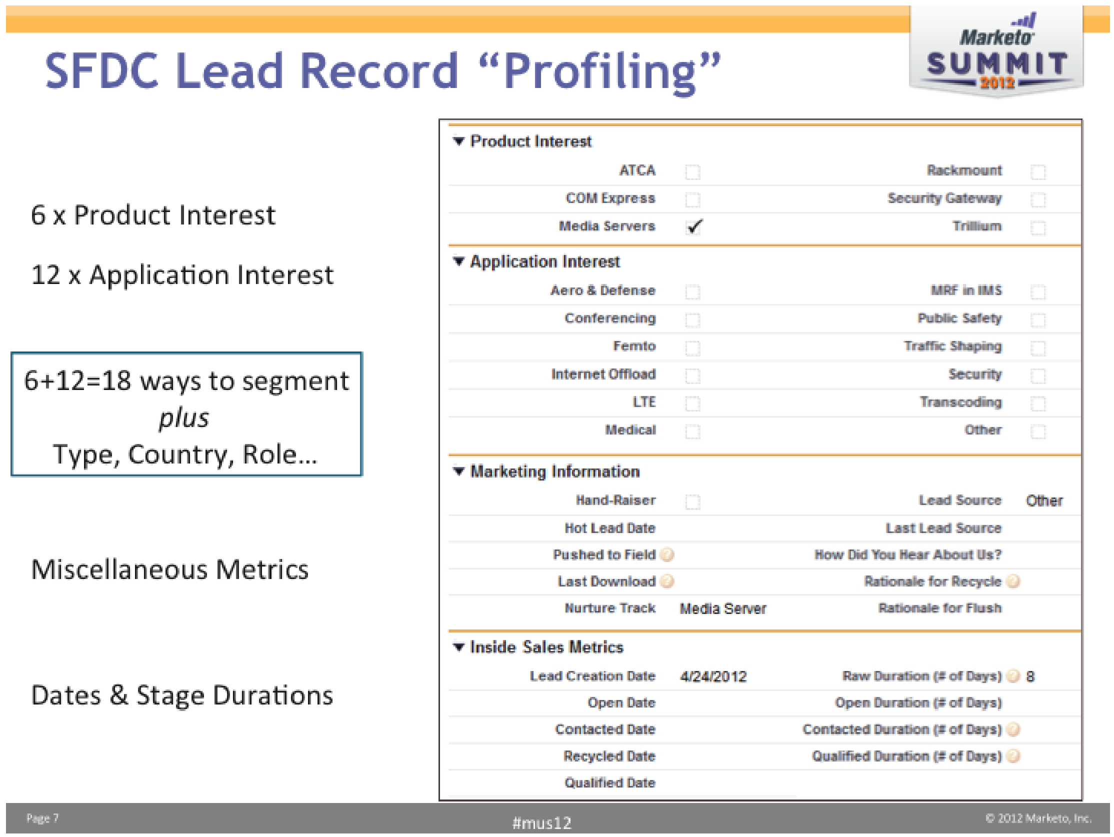
Most firms have a few different service lines. You will likely need to setup a multi-track nurturing system with a full Traffic Cop to manage it all. Fortunately, quite a few people have developed systems to help give you ideas on where to start. Let's take a look at a case study:

Case Study: Radisys Nurturing

Many thanks to Brian Wood, Director of Marketing at Radisys (now at American Internet Services) who presented his nurturing system at the 2012 Marketo Summit. He generously allowed me to borrow from his slides to show you how one system might work. His slides are worth a review because his naming and organizations scheme is useful.

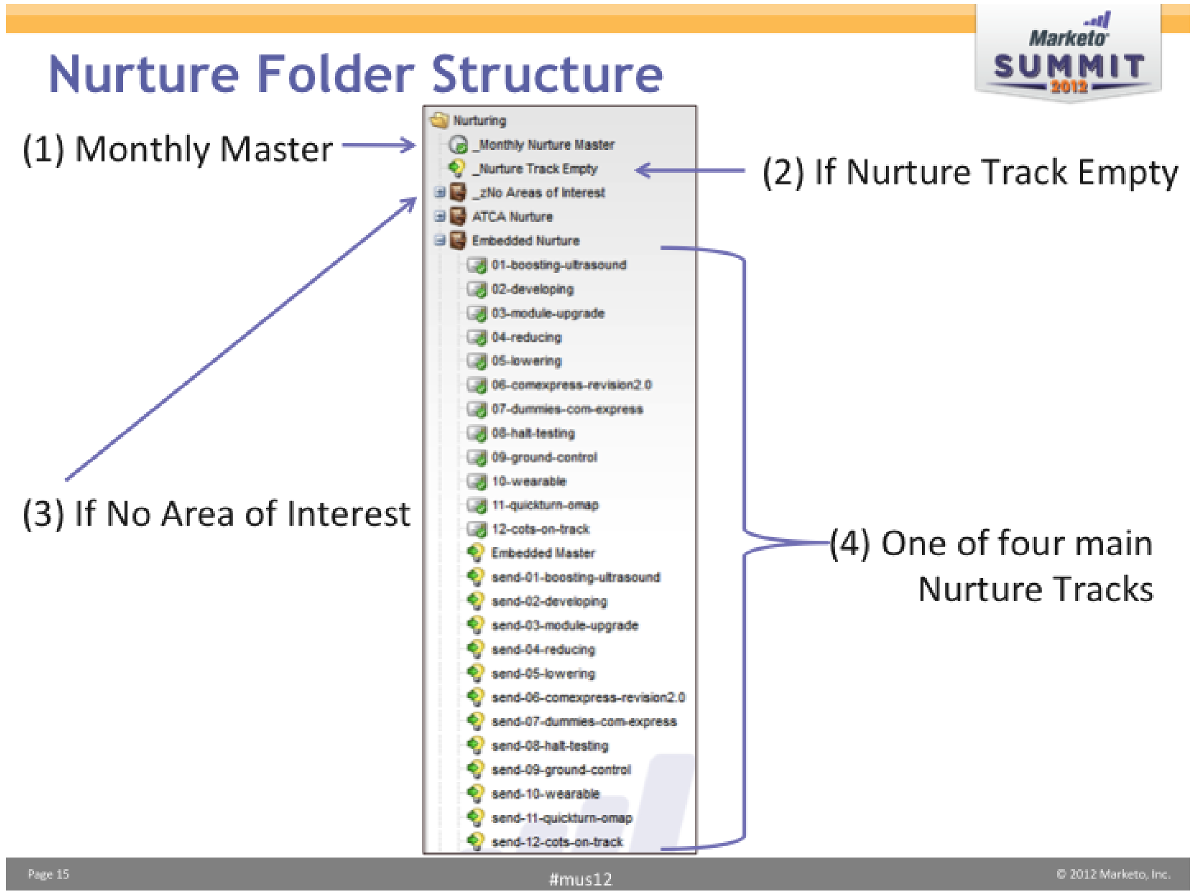
Preparation: SFDC

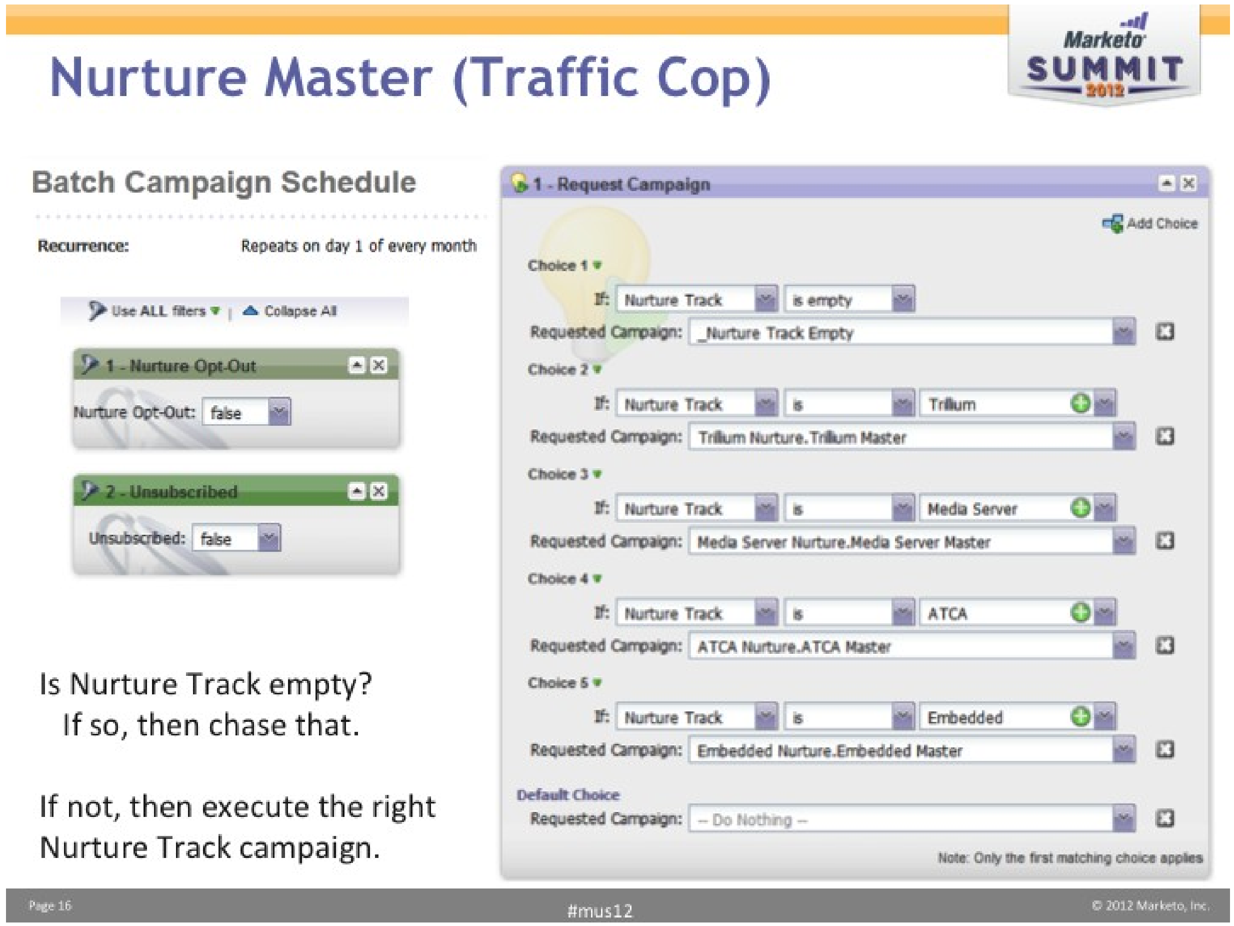
Brian has ensured that each record records Product Interest details and Marketing details that can be used for campaigns.



Brian setup nurturing to send out on the first of every month with a content offer linked to a CTA and form fill out. Leads can be in 6 buckets and they can change their track.

Nurturing Master Setup




Nurture Master (Traffic Cop)
Marketo SUMMIT 2012
Batch Campaign Schedule
Recurrence: Repeats on day 1 of every month
Use ALL filters | Collapse All
1 - Nurture Opt-Out
Nurture Opt-Out: false
2 - Unsubscribed
Unsubscribed: false
Is Nurture Track empty?
If so, then chase that.
If not, then execute the right Nurture Track campaign.
1 - Request Campaign
Add Choice
Choice 1
If: Nurture Track is empty
Requested Campaign: _Nurture Track Empty
Choice 2
If: Nurture Track is Trillum
Requested Campaign: Trillum Nurture.Trillum Master
Choice 3
If: Nurture Track is Media Server
Requested Campaign: Media Server Nurture.Media Server Master
Choice 4
If: Nurture Track is ATCA
Requested Campaign: ATCA Nurture.ATCA Master
Choice 5
If: Nurture Track is Embedded
Requested Campaign: Embedded Nurture.Embedded Master
Default Choice
Requested Campaign: -- Do Nothing --
Note: Only the first matching choice applies
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#mus12
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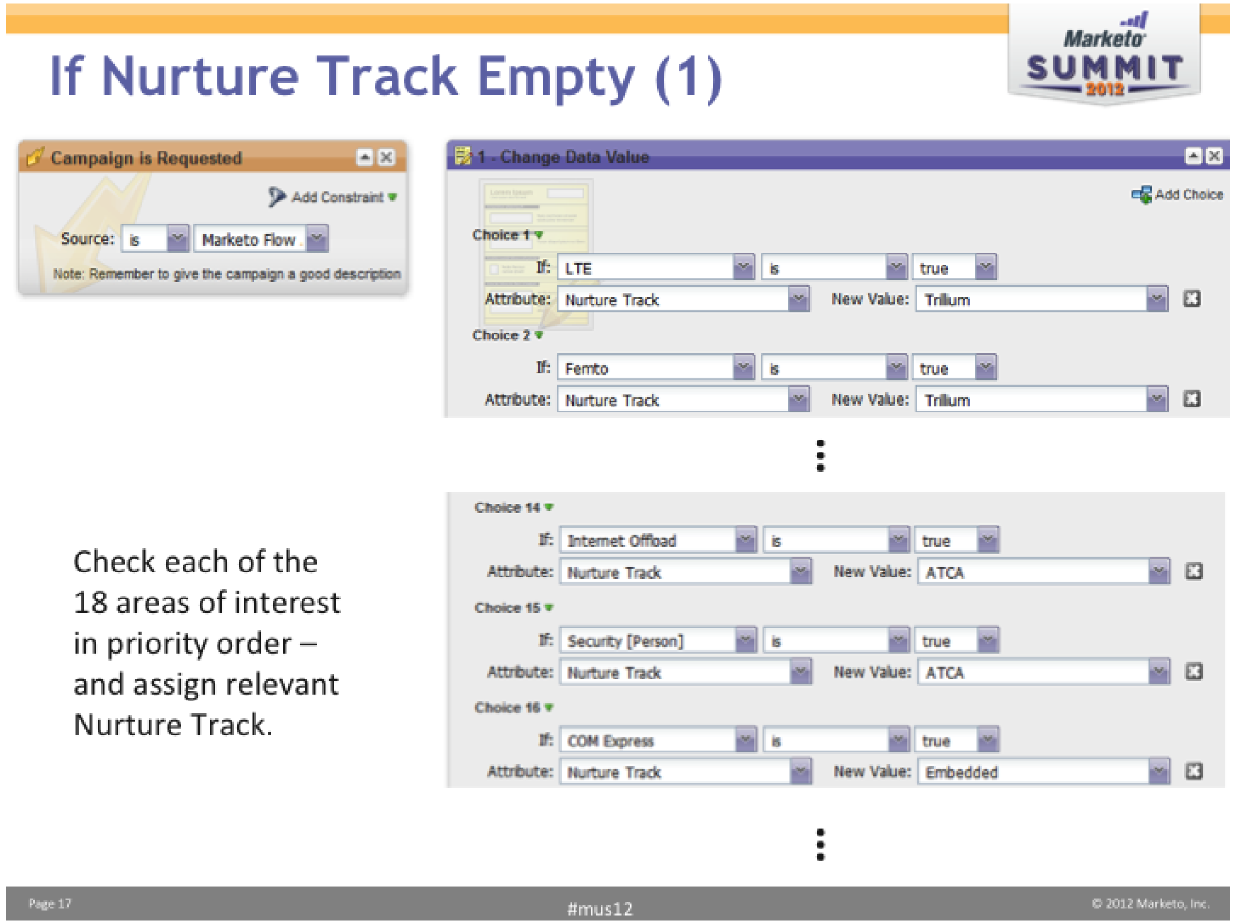
If Nurture Track Empty (1)
Marketo SUMMIT 2012
Campaign is Requested
Add Constraint
Source: is Marketo Flow
Note: Remember to give the campaign a good description
1 - Change Data Value
Add Choice
Choice 1
If: LTE is true
Attribute: Nurture Track New Value: Trilium
Choice 2
If: Femto is true
Attribute: Nurture Track New Value: Trilium
Choice 14
If: Internet Offload is true
Attribute: Nurture Track New Value: ATCA
Choice 15
If: Security [Person] is true
Attribute: Nurture Track New Value: ATCA
Choice 16
If: COM Express is true
Attribute: Nurture Track New Value: Embedded
Check each of the 18 areas of interest in priority order – and assign relevant Nurture Track.
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#mus12
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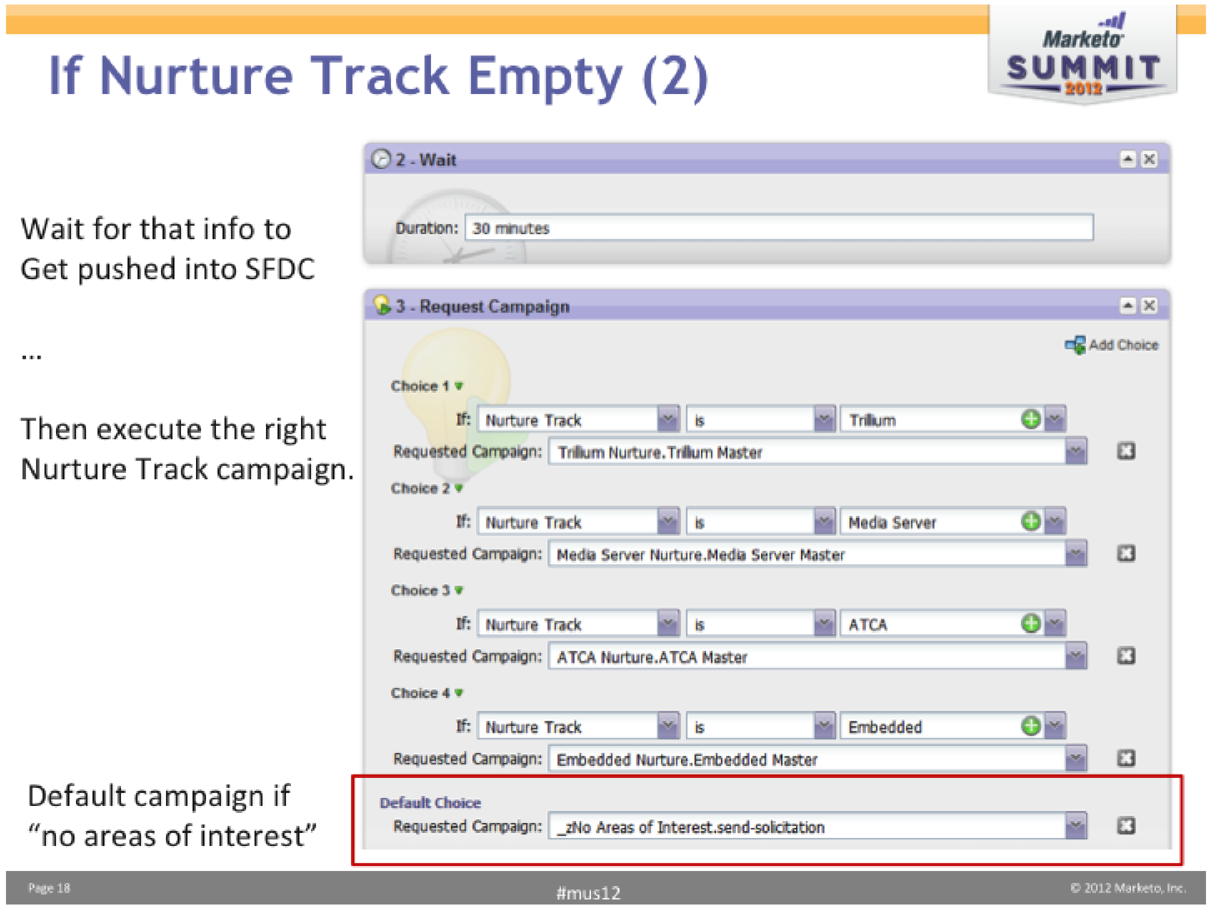
If Nurture Track Empty (2)
Marketo SUMMIT 2012
Wait for that info to
Get pushed into SFDC
...
Then execute the right
Nurture Track campaign.
Default campaign if
"no areas of interest"
2 - Wait
Duration: 30 minutes
3 - Request Campaign
Add Choice
Choice 1
If: Nurture Track is Trillium
Requested Campaign: Trillium Nurture.Trillium Master
Choice 2
If: Nurture Track is Media Server
Requested Campaign: Media Server Nurture.Media Server Master
Choice 3
If: Nurture Track is ATCA
Requested Campaign: ATCA Nurture.ATCA Master
Choice 4
If: Nurture Track is Embedded
Requested Campaign: Embedded Nurture.Embedded Master
Default Choice
Requested Campaign: _zNo Areas of Interest.send-solicitation
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#mus12
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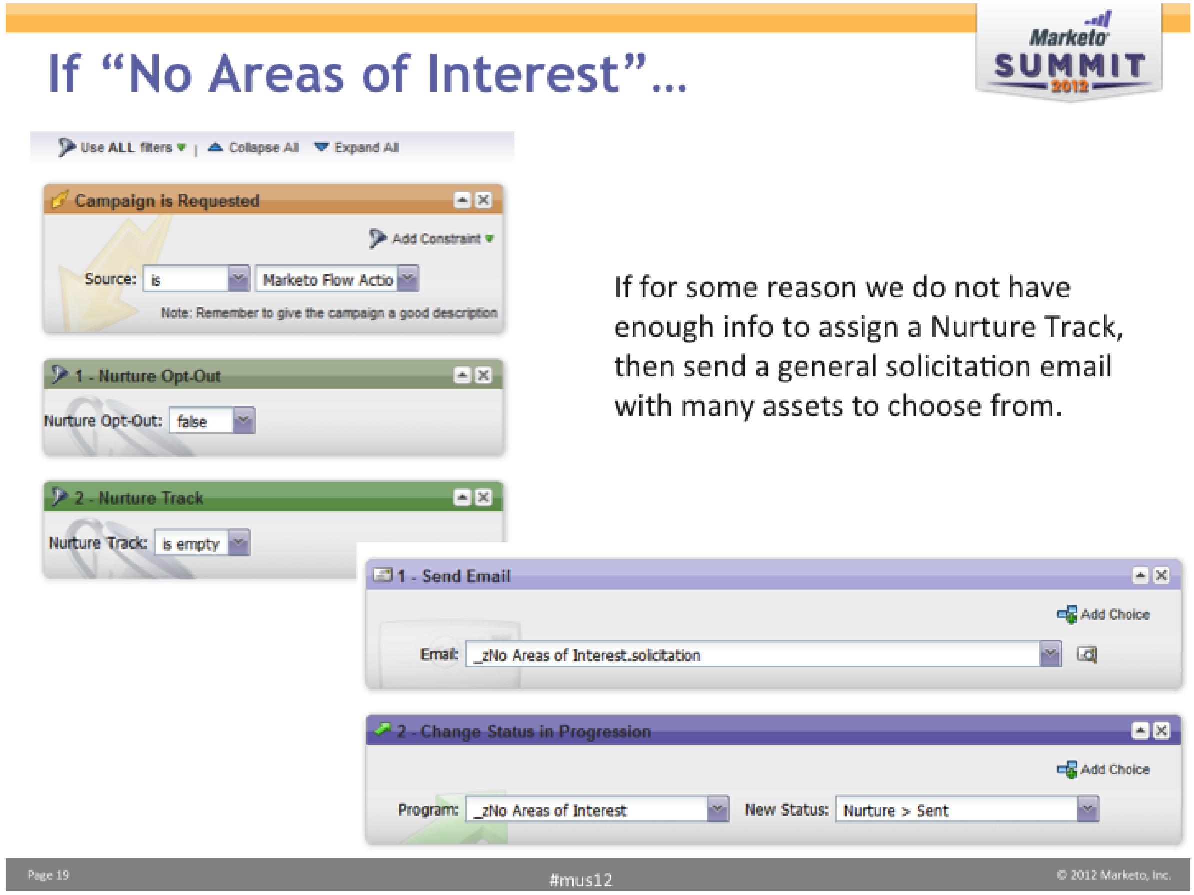
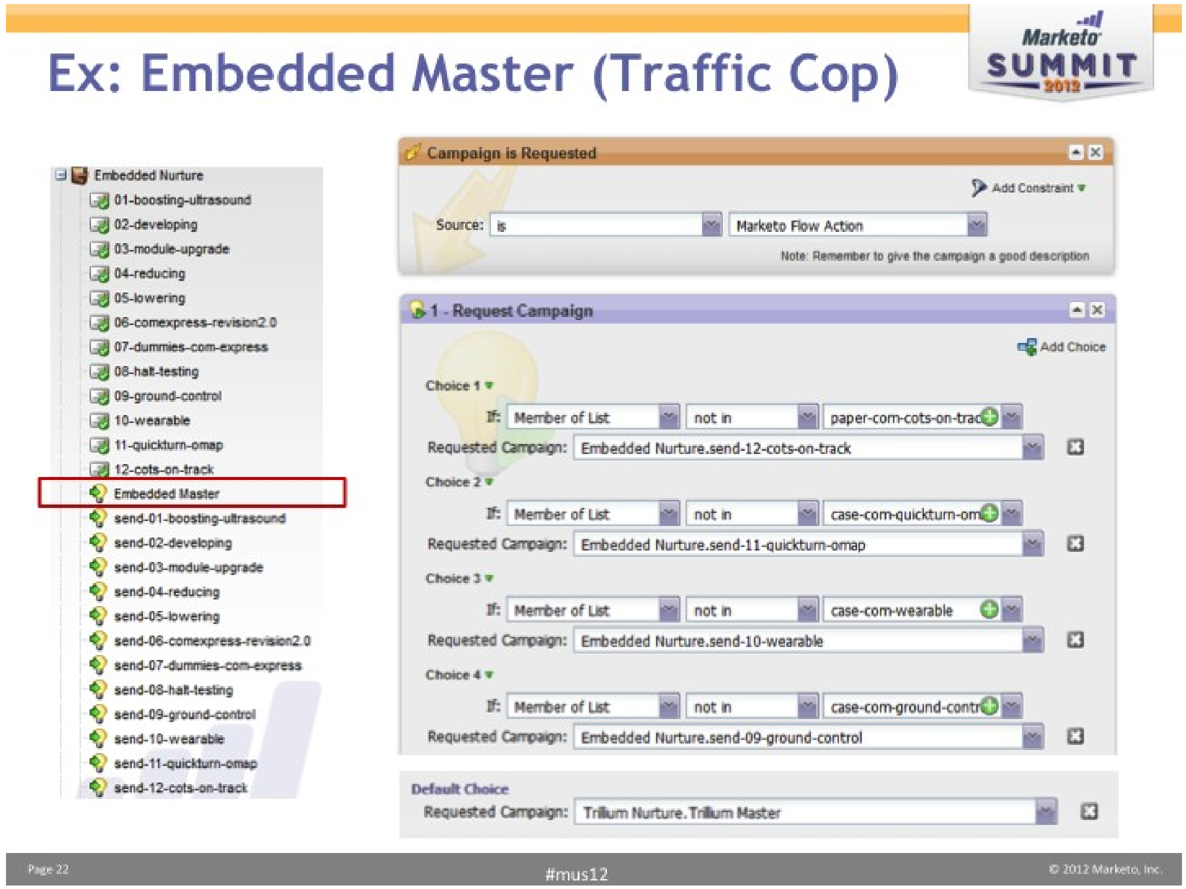


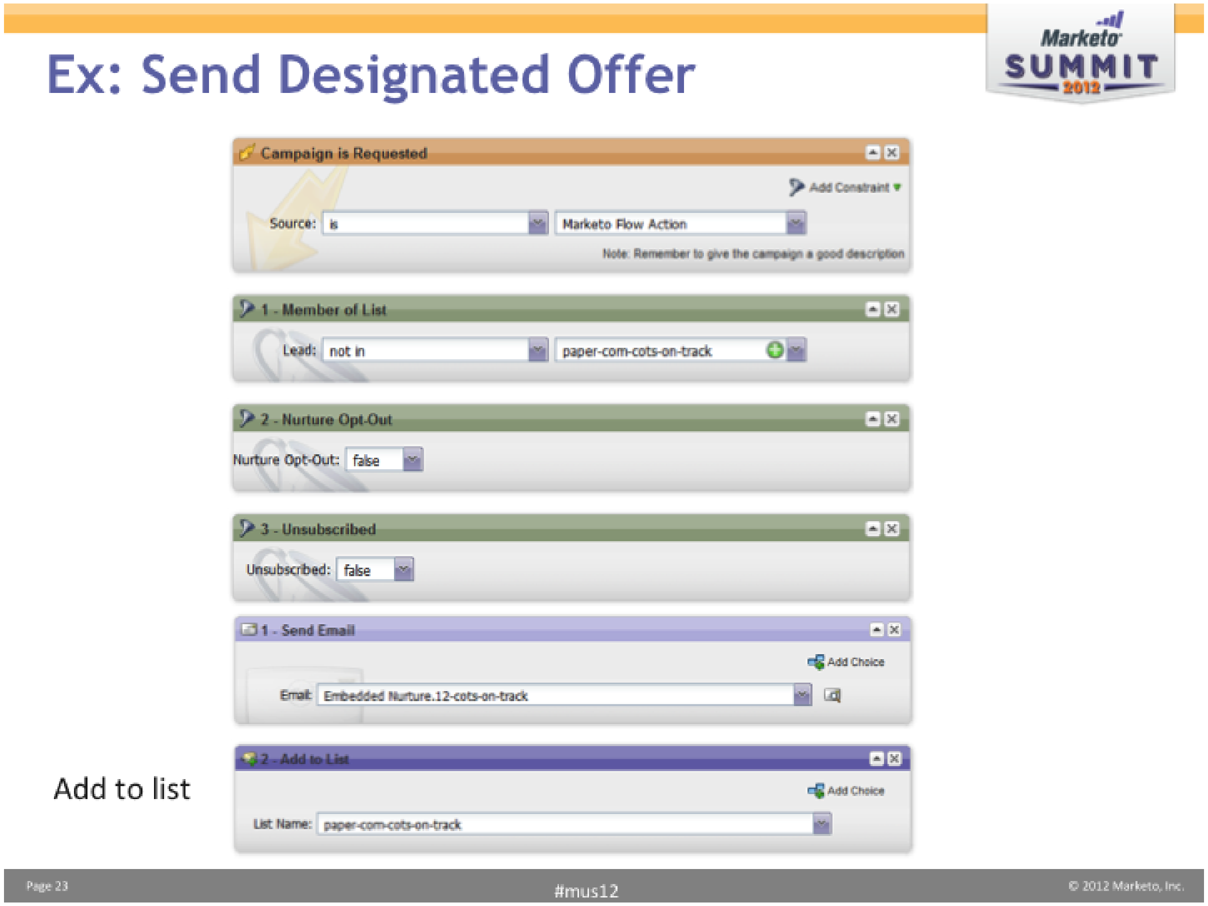
For each of the four nurture tracks, the Traffic Cop checks to see if lead is in asset list

- If no, then request campaign to send offer
- If yes, then go to next asset and check if lead is in that list.
- New assets added and named in chronological order. Newest (or most important) go on top.
- If Nurture Track exhausted, then go to another track, but it is unlikely for any lead to exhaust all of the assets.

The Embedded Master Traffic Cop



Then send the offer:


Ex: Send Designated Offer
Marketo SUMMIT 2012
Campaign is Requested
Add Constraint
Source: is
Marketo Flow Action
Note: Remember to give the campaign a good description
1 - Member of List
Lead: not in
paper-com-cots-on-track
2 - Nurture Opt-Out
Nurture Opt-Out: false
3 - Unsubscribed
Unsubscribed: false
1 - Send Email
Add Choice
Email: Embedded Nurture.12-cots-on-track
2 - Add to List
Add Choice
List Name: paper-com-cots-on-track
Add to list
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#mus12
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Reporting on Nurturing

Brian shows us in detail how Nurturing Reporting can work.

The Email Performance Report:

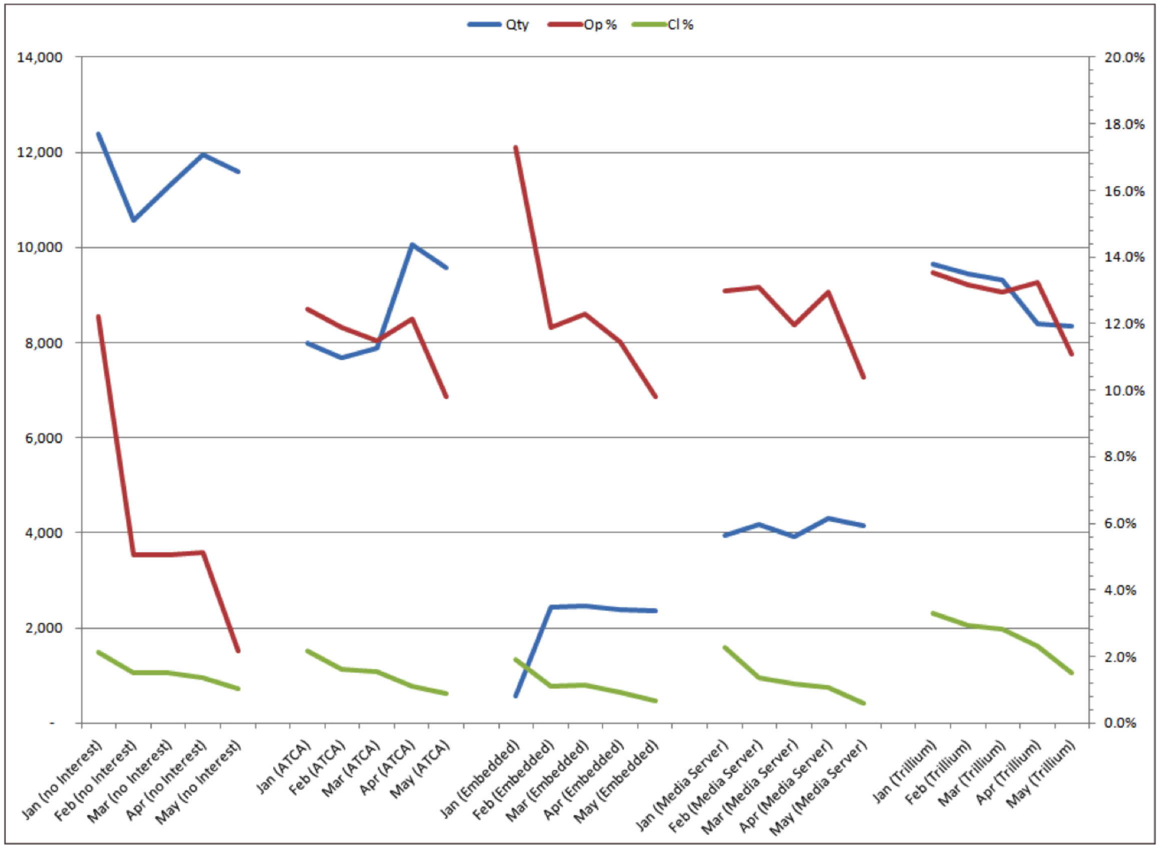
Date of Activity: This Month (May 1, 2012 - May 31, 2012 PDT)

Em View Setup	Messages Deliv...	Opened	% Ope...	Clicked...	% Clicked E...	Unsubsc...	% Unsubscr...
Email Performance							
Embedded Nurture.08-halt-testing	434	56	12.9%	7	1.6%	1	0.2%
Embedded Nurture.09-ground-control	1,863	165	8.9%	8	0.4%	12	0.6%
Embedded Nurture.10-wearable	10	3	30.0%	0		0	
Embedded Nurture.11-quickturn-omap	28	5	17.9%	0		0	
Embedded Nurture.12-cots-on-track	19	2	10.5%	1	5.3%	0	
Total:	**2,354**	**231**	**9.8%**	**16**	**0.7%**	**13**	**0.6%**

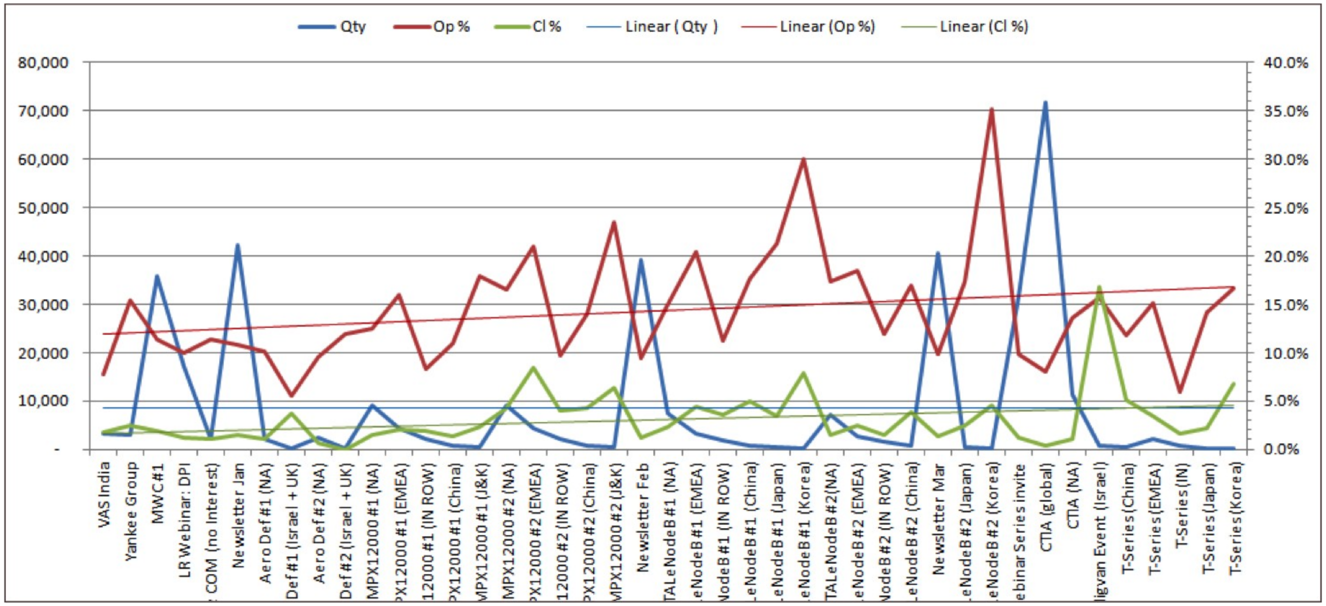
Date of Activity: This Month (May 1, 2012 - May 31, 2012 PDT)

Email Name ▲	Messages Deliv...	Opened	% Ope...	Clicked...	% Clicked E...	Unsubsc...	% Unsubscr...
Email Performance							
Trillium Nurture.02-cpe-wan	1	0		0		0	
Trillium Nurture.03-iuh	2	0		0		0	
Trillium Nurture.04-tcap	22	3	13.6%	0		0	
Trillium Nurture.05-coordinated	3	1	33.3%	0		0	
Trillium Nurture.06-srvcc	6	0		0		0	
Trillium Nurture.07-lipa	39	4	10.3%	4	10.3%	0	
Trillium Nurture.08-sctp-fast-path	134	16	11.9%	4	3.0%	0	
Trillium Nurture.09-mobile-data	7,400	756	10.2%	73	1.0%	8	0.1%
Trillium Nurture.10-protocol-signaling	135	24	17.8%	9	6.7%	0	
Trillium Nurture.11-interoperable	243	47	19.3%	15	6.2%	0	
Trillium Nurture.12-diameter-eps	265	49	18.5%	10	3.8%	0	
Trillium Nurture.13-white-space	106	25	23.6%	12	11.3%	1	0.9%
Total:	**8,356**	**925**	**11.1%**	**127**	**1.5%**	**9**	**0.1%**

And nurturing is improving CTRs:



Compare it to Non Nurturing Campaigns:



And of course some “old-school” campaign reports:

		Products						Applications							Geographies						Results						
Date	Subject	ATCA	COM	MS	RMS	SEG	Trill	A&D	Conf	LTE	MRF	DPI	Secure	Small	NA	EMEA	IN	China	JP	KR	Qty	Open	Op %	Click	Cl %	Un	Un %
1-Mar	Nurture Mar (no Interest)														x	x	x	x	x	x	11,288	3,267	28.9%	605	5.4%	138	1.2%
1-Mar	Nurture Mar (ATCA)	x						x				x	x								7,896	906	11.5%	123	1.6%	34	0.4%
1-Mar	Nurture Mar (Embedded)		x		x			x													2,472	304	12.3%	28	1.1%	26	1.1%
1-Mar	Nurture Mar (Media Server)			x		x			x		x										3,931	470	12.0%	47	1.2%	15	0.4%
1-Mar	Nurture Mar (Trillium)						x			x				x							9,328	1,209	13.0%	265	2.8%	24	0.3%
6-Mar	TOTALeNodeB #1 (NA)						x			x				x	x						7,560	1,134	15.0%	179	2.4%	24	0.3%
6-Mar	TOTALeNodeB #1 (EMEA)															x					3,234	660	20.4%	141	4.4%	13	0.4%
6-Mar	TOTALeNodeB #1 (IN ROW)																x				1,967	221	11.2%	71	3.6%	3	0.2%
6-Mar	TOTALeNodeB #1 (China)																	x			793	140	17.7%	39	4.9%	1	0.1%
6-Mar	TOTALeNodeB #1 (Japan)																		x		469	100	21.3%	16	3.4%	4	0.9%
6-Mar	TOTALeNodeB #1 (Korea)																			x	253	76	30.0%	20	7.9%	-	0.0%
13-Mar	TOTALeNodeB #2(NA)						x			x				x	x						7,257	1,260	17.4%	107	1.5%	29	0.4%
13-Mar	TOTALeNodeB #2 (EMEA)															x					2,795	515	18.4%	67	2.4%	36	1.3%
13-Mar	TOTALeNodeB #2 (IN ROW)																x				1,699	203	11.9%	25	1.5%	8	0.5%
13-Mar	TOTALeNodeB #2 (China)																	x			702	119	17.0%	27	3.8%	-	0.0%
22-Mar	**Newsletter Mar**	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	40,597	4,017	9.9%	560	1.4%	113	0.3%
26-Mar	TOTALeNodeB #2 (Japan)																		x		374	65	17.4%	9	2.4%	3	0.8%
26-Mar	TOTALeNodeB #2 (Korea)																			x	199	70	35.2%	9	4.5%	1	0.5%
29-Mar	**LTE Webinar Series invite**	x	x	x	x	x	x			x	x	x		x	x	x	x	x	x	x	31,605	3,103	9.8%	361	1.1%	71	0.2%
	Mar Totals	3	3	3	3	3	5	3	2	5	3	3	2	5	5	5	5	5	5	5	134,419	17,839	13.3%	2,699	2.0%	543	0.4%

Brian’s Final Thoughts

- Traffic Cop is easy to administer and analyze because you always know where leads are within their tracks.
- Need to keep feeding the machine with new content.
- Decide on a Nurturing Objective: thought leadership vs. Lead progression.

Testing Nurturing Flows

Now that you setup the nurture flows, you need to test it. Why? If you set it to automatically take in leads, there are always possibilities you missed which will create chaos later. If you run 10,000 leads into nurturing flows, then discover your Promotion Flow conflicts with your Data Management Sync and MQL Threshold Flow, bad things will happen. (Imagine 5,000 unqualified leads hitting your inside team at 8:00AM).

How do you do this? The best approach I have seen is to Clone the Program and Test. When you are done, you can either re-clone this Program to use as the real one, or make corrections to the first Program.

Testing your nurturing systems is an overlooked area. I urge you to test anything and everything at least twice before launching even a simple campaign. Testing a Nurturing system requires more thought because it is like a piece of software which has all sorts of conditions attached to it.

Key Tools:

- Program Member Tab: who is in or out. Also to remove Members to re-test.
- Sales Insight in SFDC: run MSI entries and exits.
- Lead's Activity Log: discover error points.
- Campaign Results Tab: campaign error points.
- List Counts: watch movements between lists. Remove members at end.
- Piece of paper to create test case grid and checklist.
- Extra test leads with different settings that would trigger or not trigger actions within your campaign. You may need anywhere from 6 to 20 of these.
- Time.

Step 1: Clone the Completed Nurture System

You will have a new Program and will need to adjust the campaign flows, shorten wait steps, etc.… before you begin.

Step 2: Rename the Flows to include "Test"

If you are using any Sales Insight requested campaigns, be sure to name them with a "`Test`" and put "`Do Not Use`" in the `Description`. This way you can run SI actions on test records and Sales will avoid your campaign.

Step 3: Change Wait Steps

Most nurturing flows have a several day wait between emails. You do not want to wait 6 months to finish testing. Go into each flow and change the `Wait Steps` to `2 Minutes`.

Step 4: Create a List of Test Leads

You probably already have them. Remember, you will adjust each Lead's data to trigger various steps in the nurturing process, from enter to each type of exit or success.

Step 5: Adjust Entry campaigns to only permit leads with specific email addresses.

Doing this will prevent accidental uptakes. I use a list of emails or a `Member of List` filter.

Step 6: Systematically Test Entry Points

- Automatic Entry: Activate this, and then change a group of test leads to meet that condition.
- Batch Entry: `Run once` against a specific email address.
- Sales Insight: Use a different lead and ask MSI to run the Test Entry.

Here is where I recommend creating a nice big grid for each condition and entry point. Also do this for exits:

Campaigns	Action a Lead Can Take	List(s)	Current Score
Enter 1	Email 1:	List 1	0
Batch Remove	Email 3		
Fill Out Form 1			

Please be sure to create a grid for your system.

Step 7: Systematically Test Exit Points

For each Exit Point, select one lead to meet that condition. See if it reacted properly.

- Did the lead meet the Success condition and exit properly?
- Did the Unsubscribe kick out the Lead?
- Can Sales Remove the Lead?
- Do the Alerts fire?

I tested an entire system once where we based the Success on the Lead Score being at least 35 points. We assumed that it would take 2 form fill outs to attain this. I found that because of the web visit scoring and a conflicting Lead Lifecycle campaign, that leads were exiting early. This led to a reevaluation of the system in which we used the original outside Lead Lifecycle campaign and the Promoted flow simply changed the Progression and List Status.

Step 8: Systematically Test Progression Changes

Make sure that you also test each Progression change so that changes like Delivered or Unsubscribed appear when they are supposed to.

Reporting on Nurturing

Reporting on the success of your nurturing program will vary widely depending on your setup. Of course, there are some common metrics you can extract.

From Marketo's Definitive Guide to Lead Nurturing, page 31-2, I recommend a few options. Marketo suggests listing out the Stages in your funnel and defining them.

Stages	Definition
All Names	All leads before being qualified.
Prospect	Leads within the target audience.
Sales Lead	SAL
Opportunity	A confirmed potential sale that has an Opp attached.

Then you can setup a baseline statistic with an "After Nurturing" report to demonstrate the success.

	Prospects	Prospect to Lead Rate	MQLs	Opps	Won/Lost
New Leads					
Current Database					

I also recommend watching your Progression Statuses for each nurturing Program. Let's say you setup a Reactivation Nurture Program:

Status	Count	% Of Total	Notes
Added	6	.60%	Just entered Program
Not Reachable	36	3.57%	Bounced
Delivered	57	5.65%	Known deliveries, but no further action
Inactive	0	0	Never did anything.
Viewed Offer	0	0	Opened/Viewed
Engaged	0	0	Filled Out Form
Promoted (Success)	23	2.28%	Promoted back to Sales
Exhausted	804	79.76%	Ended Program without taking enough action
Unsubscribed	23	2.28%	Unsubscribed because of this Program
Removed by Sales	0	0	Sales pulled a Lead out

Status	Count	% Of Total	Notes
Total Members	1008	100%	Total
Converted to Contact	56	5.56%	Moved from Lead to Contact
Opps Created	3	.30%	Opps directly related to this program.
Opps Won	0	0	Closed Won?
Value of Opps		$73,404	Potential.

A quick analysis shows that reactivating inactive leads after 6 months brings back 2.34% over several months, with several opportunities worth $73,404 that would never have happened otherwise. As far as response rates go, that's pretty good. Sure, unsubscribes are higher, but this group is already inactive and prone to not being interested. Even Non Reachable Leads were quite low in comparison to the rest of the list.

Program Reports

I find the Program Report summaries to be the best because they show me quickly what is going on.

Email Response Rates

You should watch these carefully and even have an Unsubscribed Status to monitor negative reactions to your Nurturing efforts. See how Brian Wood set this up at Radisys. You can setup the following reports:

- Unsubscribed Progression Status.
- Email Performance Report
- Email Smart Lists.
- Campaign Email Performance Reports.

Added and Removed by Track

As Matt Barnett at PowerSteering Software demonstrated, it can be helpful to watch Leads Added and Removed by Track. This way you know how many people enter and leave and why. Of course, it's a bit easier to do with Programs instead of creating a custom count field.

Total in Nurture

Again, watch the Total Members count across all of your Programs.

SFDC Campaign Influence

If you have RCA/RCE you can watch the Opportunity and Program Analyzers for help on this. Or you can watch the SFDC Campaign Opportunities.

Opportunities Created, Won, Lost

Inside SFDC or using Smart Lists, you can monitor the Opportunities related to your nurturing efforts. As Marketo suggests above, it is good to monitor these and note the marketing generated opportunities to demonstrate your contribution to the pipeline.

Reactivations

If you expect a lead could (or should) go through a track more than once, you will find it helpful to create a new numerical field called `Times Reactivated`. Each time the lead is reactivated by the Nurture Program, use a flow action to `Change Data Value +1` each time.

Recommended Resources

Marketo Documentation Marketo

[Import a Basic Drip Nurturing Program]

[Advanced Nurturing Concepts]

[Basic Post Show Drip Campaign]

[Marketo Masters Webinars]

[Advanced Lead Nurturing Demystified]

[Foolproof Your Campaigns a Preflight Checklist]

[Using Request Campaign and Campaign Is Requested] – critical!

[Use the Campaign Inspector] to search all of your campaigns.

[Testing Campaigns before launching]

Marketo Community Marketo

Discussion on nurture field use

Discussion on tying data to nurture

Modular Drip Campaign – Robbie Mitchell

Adding a Second List in the Middle of a Nurturing Cycle - Dan Reed, Spear Marketing

Avoiding multiple Nurture program entries with a Nurturing Assigned Field – Elliott Lowe

Use Wait Step Wait Until for Timed Emails

Migrating from campaigns to Programs with Traffic Cops

Advanced Lead Nurturing with Traffic Cops – Eric Hollebone

Testing nurturing for success

Tools

Instead of just going into Marketo to do this, you should plan it out ahead of time, with at least a pad and pencil. Others have found these tools helpful too.

Pad & Pencil
Whiteboard
Microsoft Excel® or MS Word®
Microsoft Visio®
Omnigraffie (Mac)
LucidChart
Gliffy.com

Experts

HubSpot on Optimizing Lead Nurturing

Eric Hollebone – he takes Marketo's work to a new level

Robbie Mitchell – king of the "Modular Approach" and the SDR Alert System.

Chris Russell, Director of Marketing, Marketo

Brian Wood, Director of Marketing at Radisys and Advanced Nurturing.

Appendix I – Checklists

At a Glance

Overview

If you run a lot of campaigns like I do, you probably think you have your process down. Or do you?

Every now and then a campaign goes out with a typo or worse—a wrong registration link! In this Guide we’ve discussed ways to handle those mistakes. The best way though, is to not make the mistake in the first place. Use a checklist to ensure you have all the components of the campaign ready. These are outlines only and I encourage you to modify them to suit your own business needs.

Marketing Automation Setup Checklist

Here is a checklist for those of you considering installing Marketo at your firm. It’s a fun project, but prepare in advance to save time and money. It is better to sign the contract closer to your intended launch date assuming you are ready for each of these setup tasks.

Done?	Action to Take	Notes
	Decide on a lead management process.	The entire lead funnel, including types of metrics you want.
	Conduct a lead scoring survey with Sales	See more on Lead Scoring.
	Implement changes in Salesforce	Use the sandboxes if you can
	Setup a Marketo User in SFDC	
	Determine who will have access to what inside Marketo	Setup Users & Roles
	CNAME Choice and Setup	Required.
	Add Munchkin code to your website.	Not required, but recommended.
	Email CNAME Choice and Setup	Required.
	SPF and DKIM Setup on DNS Record	Required
	Webinar Integration	I recommend GoToWebinar.
	Data.com Integration	
	SFDC Sync Setup	Turn on Marketo!
	Verify data is flowing.	
	Install Sales Insight from AppExchange	
	Decide on a naming and organizing structure	
	Setup Lead Scoring flows	

Campaign Checklist

Before sending out that email blast to 100,000 people worldwide, you might take a moment to verify your campaign will send or react accordingly. Marketo uses a "buddy system" so at least 4 eyes check each campaign.

Done?	Action to Take	Notes
	Create Campaign with correct naming scheme	Like 20121203 Big Birthday Blast
	Are the smart list filters correct?	
	If you are using a Trigger, did you verify other constraints are Any, All, or Advanced?	Any trigger will turn on the campaign, unless the green filters disagree.
	Review the flow actions.	
	Is the correct email or page listed?	Verify with the preview button.
	Did you test the email several times?	Watch out for misspellings or token issues.
	Is the subject line correct?	Are you AB Testing?
	Is the registration link correct?	Test this on more than 1 machine.
	Is the Page Approved and Live?	
	If there's a Form, is there a listen campaign to do something with that form?	Remember, Progression Statuses need coaxing to work!
	Schedule: is this sent once or many times to each lead?	
	Schedule: is this going out at the right time?	I recommend postponing even immediate campaigns by 10 minutes to avoid last minute problems.
	Does the count seem correct to you?	You can click on the number to review.
	Listen/Active Campaigns: did you press Activate?	Lighted light bulb!

Email Creation Checklist

Marketo provides a detailed email creation checklist for all elements of the email. Let's summarize the key things to look for when creating an email, especially *cloned* emails.

Done?	Action to Take	Notes
	New or Clone Email	Design Studio or Program
	Is this the right template?	You can check when creating or on the summary.
	Named correctly?	Is it clear and dated?
	Subject Line	Can be a token
	From Email Address	Can be a token

Done?	Action to Take	Notes
	Reply To Email Address	Can be a token
	Email Settings: View as Web Page	
	Email Settings: Publish to Sales Insight	Should be False unless needed.
	Email Settings: Operational Email	Almost always = False
	Text Version on Each Editable Area?	Usually better to format text offline first. Be sure to press Copy to HTML after any link changes.
	Is the Slug/Salutation Correct?	Watch out for wrong tokens.
	Signature Correct?	Can be token, be careful.
	Footer Correct for this Region?	
	Is Auto Saved showing after each change?	
	Copy correct and spell checked?	
	Send Test (HTML and Text)	Verify links work in each version.
	Links Work?	Do they open as intended? In New Window is best.
	Turn off tracking on Mailto or other links?	Sometimes you need to remove tracking using Class=mktNoTrack on URLs
	Approve Email	
	Sales Insight Email Turn Off?	Come back to turn these off after the event.
	Spam Assassin Check?	If you can, run it through a spam checker.

Other Resources

Email Design Checklist

Email Design Checklist [PDF]

Landing Page Checklist

Landing Pages are a bit different and have their own checklist.

Done?	Action to Take	Notes
	New or Clone LP	Design Studio or Program
	Right Template?	This is ok to change when cloning
	Right Naming Scheme?	

Done?	Action to Take	Notes
	URL Slug is SEO	Change this now to use dashes and SEO because Marketo will just use the Program Name+LP Name here.
	Edit Text Elements	
	Form	Is this the right form?
	Form Thank You Page	Did you insert the correct post registration Page or URL?
	Form Formatting	This can be controlled by STYLE or other scripts. Does it look correct on Preview or Approved? Sometimes Approved pages are better indicators.
	Other Page Elements	Tokens, text, images, etc.
	Do Links work?	
	Head/Meta Tags	Did you insert the Meta tags as appropriate for SEO purposes and for a clean look to the user?
	Preview	
	Approve Page	View this page and test it.
	Add Approved Page to appropriate trigger flow.	Remember to add this page as a Fills Out Form Constraint or as appropriate.
	Form Actions	Is the Form going to the right TY Page?

Webinar Checklist

We discussed how to run webinars in an earlier chapter. Marketo and webinar providers also have great checklists for running a stellar event.

Done?	Action to Take	Notes
	Set Webinar Credentials	Should only need to do this once.
	Create Webinar in Webinar Provider	Make sure dates, times, organizers are correct.
	Create/Clone SFDC Campaign	Be sure this is a similar webinar or a new one to avoid progression errors.
	Program Clone/Create	Use a Program Template for repeatable events.
	Channel=Event→Webinar	

Done?	Action to Take	Notes
	Assign Webinar	
	Connect to SFDC Campaign	
	Edit My Tokens	As appropriate
	Update Emails	Invitation, Confirmation if used, others if needed.
	Verify Flows	
	Verify Smart Lists	
	Update Landing Page	Verify tokens or change content including Meta Tags
	Approve Landing Page	
	Update Email and My Tokens with URL	
	Add Page to Registration Flow	
	Turn on Registration Flow	Make sure this is listening for the right Form+Page combo and changes Progression to Registered.
	Test Registration	
	Set Invitation Send Schedule	Verify Count appears correctly.
	Watch Registration Counts for errors	
	Run Webinar, Enjoy!	
	Wait for Attended refresh data.	
	Update Thank You Attended & Missed Emails	Text, links to recording, etc.
	Send Thank You Emails	You can use a single Choice Flow Step
	Turn on Attended On Demand Option	Optional

Additional Checklist Ideas

Running a Webinar [Spear Marketing]

Webinar Invitation Ideas [Spear Marketing]

7 Mistakes to Avoid in Your Webinar Invitation [Spear Marketing]

Science of Webinars [HubSpot]

Marketo Webinar Instructions [Marketo]

Webinar Event Examples

Program Event Instructions

Event Video

Live Events: Trade Shows and Roadshows

We discussed running these earlier, so here's a quick and dirty checklist for you. These are the basic components of any good live event. Save the breakfast buffet for me!

Remember: to use the iPad app registration system, you must use the Roadshow Channel.

Done?	Action to Take	Notes
	Decide on Event and Date	Work backwards to determine when you need to begin sending invitations. Usually 4 weeks or more is required.
	Confirm Speakers	Do this before you invite anyone. Have backups.
	Confirm Venue, Dates, Locations, Directions	Prepare materials before building any collateral.
	Confirm Topics and Content	Confirm with speakers.
	Decide which items can be tokenized (common elements)	Save time with copy and paste.
	Write Copy	
	Create/Clone SFDC Campaign	Be sure this is a similar webinar or a new one to avoid progression errors.
	Program Clone/Create	Use a Program Template [LINK] for repeatable events.
	Channel=Event→Trade Show	
	Channel=Event→Roadshow (iPad)	
	Connect to SFDC Campaign	
	Set Date and Location	This is critical. Registration data will appear in iPad app 7 days before event.
	Edit My Tokens	As appropriate
	Update Emails	Invitation, Confirmation if used, others if needed.
	Verify Flows	
	Verify Smart Lists	

Done?	Action to Take	Notes
	Update Landing Page	Verify tokens or change content including Meta Tags
	Approve Landing Page	
	Update Email and My Tokens with URL	
	Add Page to Registration Flow	
	Activate Registration Flow	
	Test Registration	
	Set Invitation Send Schedule	Verify Count appears correctly.
	Watch Registration Counts for errors	
	Enjoy Your Event!	
	Wait for Attended refresh data.	
	Update Thank You Attended & Missed Emails	Text, links to recording, etc.
	Send Thank You Emails	You can use a single Choice Flow Step
	Turn on Attended On Demand	Optional

Other Resources

IPad Event Instructions

Live (offline) Event Tutorial

Whitepaper Download System

With the advent of Programs, setting up a simple download campaign system is easy. I recommend setting up a Program Template for the entire Promotion through Reporting process.

Done?	Action to Take	Notes
	Create Asset	Upload to Images or another site
	Create/Clone SFDC Campaign	Be sure this is a similar webinar or a new one to avoid progression errors.
	Program Clone/Create	Use a Program Template for repeatable events.

Done?	Action to Take	Notes
	Channel=Default→Email Blast	You may want a Whitepaper or Asset Download Program Channel: -Sent -Opened -Viewed Page -Form Fill Out -Downloaded
	Connect to SFDC Campaign	
	Edit My Tokens	As appropriate
	Update Emails	Promotion emails and follow ups
	Verify Flows	
	Verify Smart Lists	
	Update Landing Page	Verify tokens or change content including Meta Tags
	Approve Landing Page	
	Update Email and My Tokens with URL	
	Add Page to Download Flow	This Flow may just Change Progression or it may also send a follow up email with the link.
	Turn on Download Flow	
	Test Downloads	
	Set Email Send Schedule	Verify Count appears correctly.
	Watch Registration Counts for errors	
	Watch counts roll in.	
	Update Thank You Attended & Missed Emails	Text, links to recording, etc.
	Send Thank You Emails	You can use a single Choice Flow Step
	Reporting	

Importing a List

Please refer to the Importing a List section for further details, or the Marketo documentation.

Done?	Action to Take	Notes
	Prepare Your Spreadsheet – Save a Copy First as "Working"	
	Delete unnecessary columns	
	Rename columns to Marketo names	Exact match required (it works better).
	Update values to match database	Make sure values like Source or Role match pick list values in your CRM otherwise you end up with junk later.
	Save As CSV file.	This may mean breaking up one file into several csv files.
	Create a List in a Program or Lead Database	Use the right names
	Press Import List	
	Step 1: File, CSV, Trusted, Normal	Other options if you know them.
	Step 2: Preview	Map columns correctly or IGNORE some fields.
	Step 3: Import Options	List Name
	Revenue Stage (RCM only)	
	Acquisition Program (for Programs and New Leads only)	Leave this as None in most cases.
	After import, be sure to verify data or update fields as needed.	
	Run a campaign to Add to SFDC Campaign or update other data.	

Common Field Names in Marketo

To create this list for your own system, take the following steps:

Step 1: Go to Lead Database

Step 2: Search for a single lead

Step 3: Press Export > All Columns

Here is a list of typical Marketo field names, which you can use as headers in your import spreadsheets. Please use this list carefully as it may not match your system.

Black Listed Cause	Inferred Country	Lead Status	SFDC Account Type
City	Inferred Metropolitan Area	Main Phone	SFDC Campaigns
Company Name	Inferred Phone Area Code	Marketing Suspended	SFDC Type
Company Notes	Inferred Postal Code	Marketing Suspended Cause	SIC Code
Country	Inferred State Region	Middle Name	Sales Created Date
Created At	Is Anonymous	Mobile Phone Number	Salutation
Date of Birth	Is Customer	Number Of Employees	Site
Deleted In Sales	Is Partner	Number of Opportunities	State
Do Not Call	Job Title	Original Referrer	Total Opportunity Amount
Do Not Call Cause	Last Name	Original Search Engine	Total Opportunity Expected Revenue
Do Not Call Reason	Lead Notes	Original Search Phrase	Unsubscribed
Email Address	Lead Owner Email Address	Original Source Info	Unsubscribed Cause
Email Invalid	Lead Owner First Name	Original Source Type	Unsubscribed Reason
Email Invalid Cause	Lead Owner Job Title	Parent Company Name	Updated At
Fax Number	Lead Owner Last Name	Person Notes	Website
First Name	Lead Owner Phone Number	Phone Number	

Appendix II – Filters, Flows, and Triggers

At a Glance

Here it is, the most complete reference to Marketo Filters, Flows, and Triggers, and more in one place. Enjoy.

Operators and Logic

Marketo uses Boolean and other operators to match your criteria to matching Lead records. Understanding how these operators work is crucial to leveraging the power of Marketo.

Standard Operators

You can view more on Standard Operators in the Community.

Match Type	Returns leads who…	Example	Appears On
Is	Exact match	State=AZ only returns State=AZ	Most fields
Is Not	Does not exactly match	State IS NOT AZ returns any other value like NY, CA, Florida	Most fields
Starts With	Starts with the value you provide	Starts with "Aus" returns Australia, Austria, etc.	Most fields
Not Starts with	Does not begin with that value	"Aus" would return anything other than Australia, Austria.	Most fields
Contains	Contains the value anywhere	US returns US, Australia, Austria, etc.	Most fields
Not Contains	Does not contain that value anywhere	Not Contains "US" returns Europe, United Kingdom, UK, etc.	Most fields
Is Empty	Equivalent to NULL or Blank	Only empty values.	Most fields
Is Not Empty	Has any value which is not NULL	Only has a value.	Most fields
True	Have this set to True or 1	Unsubscribed=True	T/F or Checkbox fields
False	Have this set to False or 0	Unsubscribed=False	T/F or Checkbox fields
In	Is Member of a List, Campaign, Program	Member of Smart List = House List	Member of filters

Match Type	Returns leads who…	Example	Appears On
Not In	Is Member of a List, Campaign, Program	Not a Member of Smart List = House List	Member of filters

Numerical Operators

Numerical Operators function differently than text operators.

Match Type	Returns leads who…	Example	Appears On
Between	Have a value between X and Y	Num of Subscribers Between 7 and 5000	Numerical, date fields.
Greater Than	Value must be greater than X	7 ≤ 5000 (includes)	Numerical, date fields.
Less Than	Value must be less than X	Greater than (but not including) 100	Numerical, date fields.
At Least	Value must at least X and higher is ok too	> 100	Numerical, date fields.
At Most	Value must be no greater than 100 and can include 100	Less than (but not including) 100	Numerical, date fields.

Date Operators

Date Operators are also special. These can appear on a date field filter or as a Constraint on an activity filter like Visited Web Page.

Match Type	Returns leads who…	Example	Appears On
IS	Match date exactly	Lead Created At January 1, 2012	Date filters and constraints
IS NOT	Matches all other dates	Lead Created At NOT January 1, 2012 returns all others except this date.	Date filters and constraints
Between	Between two dates, but not including them.	Leads Created Between December 31, 2012 and March 1, 2012	Date filters and constraints
In Past	Past X time, including today.	Leads Created In Past 3 weeks	Date filters and constraints
In Time Frame	Relative to Calendar selections	Pre sets include Yesterday, Last Full Week, Last Week (M-F) or Last Month.	Date filters and constraints

Match Type	Returns leads who…	Example	Appears On
After	After a date (not including)	After March 15, 2012	Date filters and constraints
Before	Before a date (not including)	Before March 15, 2012	Date filters and constraints
On or After	Including date and all dates after.	On or After August 12, 2012	Date filters and constraints
On or Before	Including date and all before	On or Before August 1, 2012	Date filters and constraints
Is Empty	Equivalent to NULL or Blank	Only empty values.	Date filters and constraints
Is Not Empty	Has any value which is not NULL	Only has a value.	Date filters and constraints

Smart List Rules (Between Filters)

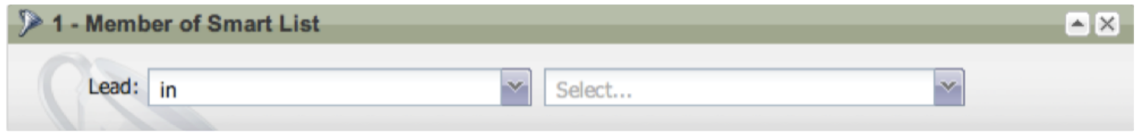
Smart List Rules are in the upper left corner under the Smart List name. These determine the logic between filters and be used in a variety of ways.

Regular (Green) Filters – What Happened Already

If you are using green filters, you can use `ALL, ANY`, or `Advanced`.

Logic Option	What Happens
ALL	This is a Boolean AND between each filter.
ANY	If your filter has a multi-choice green + then the filter will match OR, but between filters is AND.

Logic Option	What Happens
Advanced	Boolean AND/OR between filters. Parentheses and nested (()) are allowed. **NOT is not allowed because you have positive and negative filters (not was…)



Triggered (Orange) Filters – Happening Now

If you have any Triggered criteria, you can only use ALL or ANY as options. It is important to note that multiple Triggers use the OR operator between them, such that any trigger will fire the campaign if the Lead matches the remaining Green filter criteria.

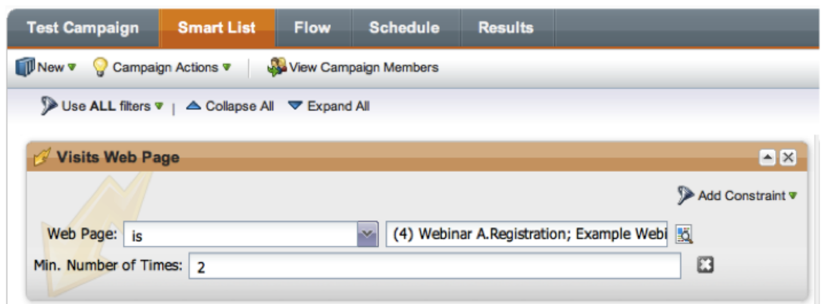


Figure 7. A single trigger.

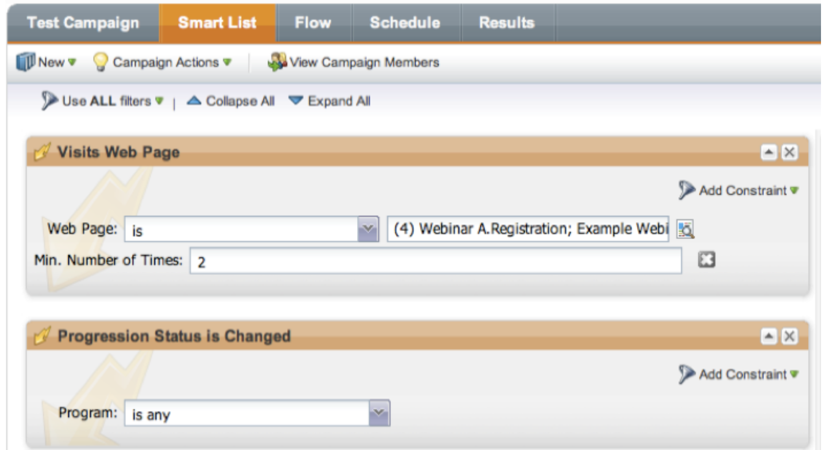


Figure 8. Two or more Triggers - will react when *either* condition is true.

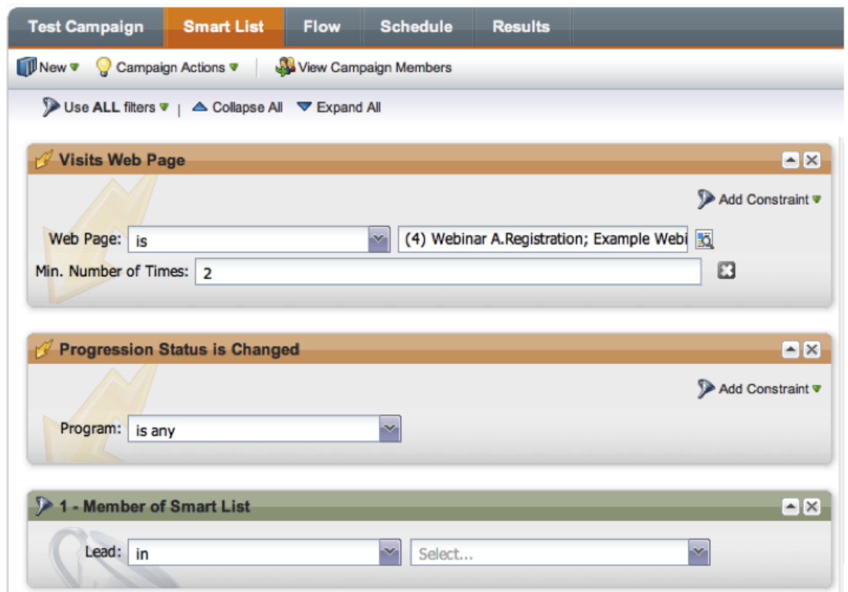


Figure 9. Two or more triggers with a Filter - will run when either trigger is true *and* if the lead also meets the Filter condition.

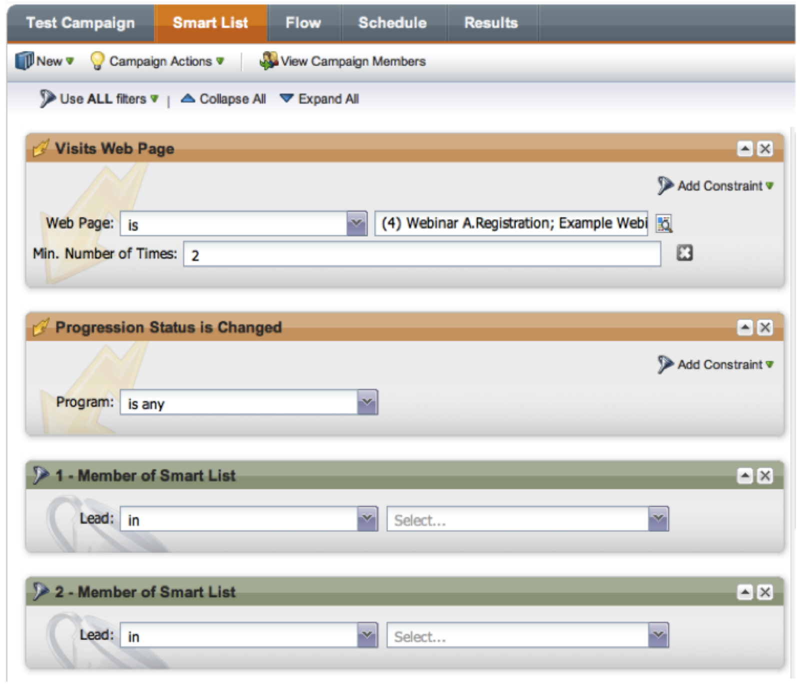


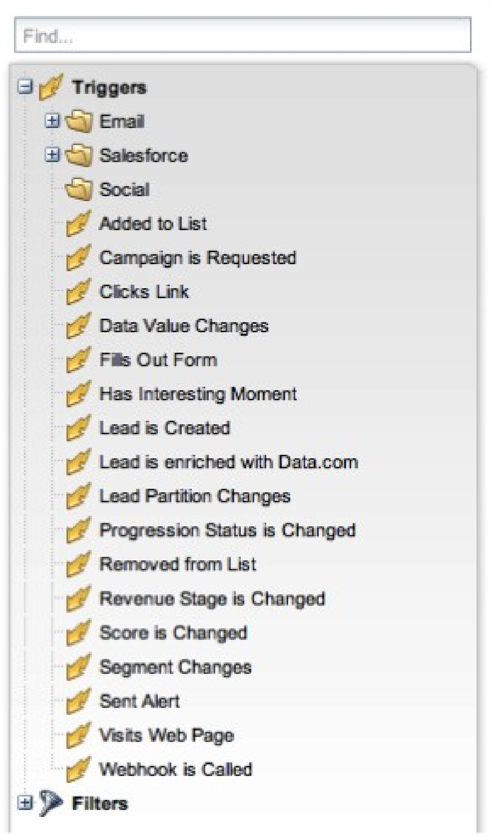
Figure 10. Multiple triggers and filters - will react when either trigger is true *and* the lead meets both filter conditions.

Number of Triggers	Trigger Evaluated	Filters Evaluated	Logic Option	Campaign Triggered?
One Trigger	Trigger is True	Filter is True	ALL or ANY	Yes
One Trigger	Trigger is True	Filter is False	ALL or ANY	No
Two or More Triggers	Any trigger can be true. Marketo always uses "OR" between Triggers (Fills Out Form is Any) OR (Data Value Changes is Name) will trigger the campaign	Filter is True	ALL or ANY	Yes

Number of Triggers	Trigger Evaluated	Filters Evaluated	Logic Option	Campaign Triggered?
Two or More Triggers	Any trigger can be true. Marketo always use "OR" between Triggers (Fills Out Form is Any) OR (Data Value Changes is Name) will trigger the campaign	Filter is False	ALL or ANY	No
Two or More Triggers	Any trigger can be true. Marketo always uses "OR" between Triggers (Fills Out Form is Any) OR (Data Value Changes is Name) will trigger the campaign	All Filters are True	ALL	Yes
Two or More Triggers	Any trigger can be true. Marketo always uses "OR" between Triggers (Fills Out Form is Any) OR (Data Value Changes is Name) will trigger the campaign	Some Filters are True	ANY	Yes
Two or More Triggers	Any trigger can be true. Marketo always uses "OR" between Triggers (Fills Out Form is Any) OR (Data Value Changes is Name) will trigger the campaign	No filter match	ANY	No

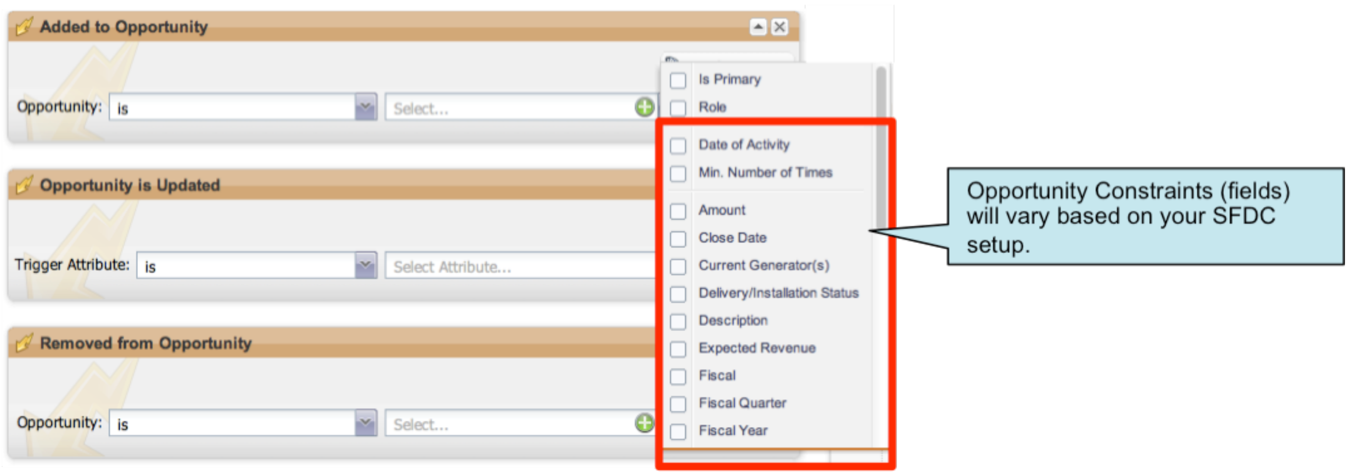
Triggers and Constraints

Trigger Filters are analogous to Marketo's green Activity Filters, except they are orange and will initiate a campaign automatically when the campaign is in listen, or "Activated" mode denoted by a lighted light bulb icon.



Opportunity Triggers

Opportunity data has a different set of Triggers and Filters which incorporate your Opportunity fields into the Constraints. Here are the standard Opportunity Triggers.



Added to Opportunity

This trigger activates when any Lead is Added to an `Opportunity`. In reality this means in SFDC, your Contact was attached to an Opportunity in some way. You can Add Constraints based on the custom fields on your Opportunity records.

Opportunity is Updated

Triggers when a custom field is changed. You can use the standard `Old Value` and `New Value` Constraints or additional fields from your Opportunities.

Removed from Opportunity

Triggers whenever the Lead is removed from an Opportunity. Be specific or it can trigger on removal from any Opportunity that Lead is attached to.

Standard Triggers

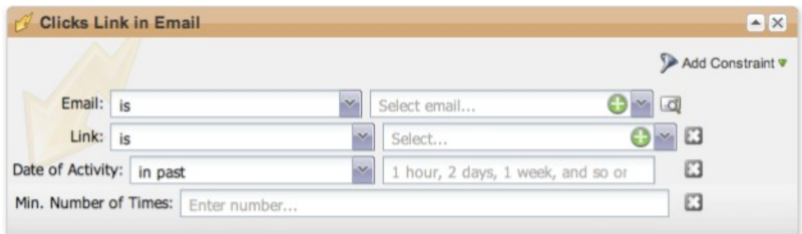
These Triggers come standard with Marketo when it is synced with Salesforce. If you use Microsoft Dynamics or Sugar CRM, you may have slightly different triggers.

Email Triggers (includes Sales Insight)

I include all email related triggers here, although Sales Insight triggers are shown in the Salesforce folder.

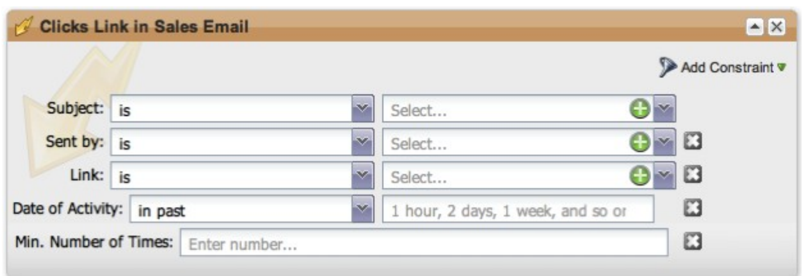
Clicks Link in Email

When someone clicks a link in an email. Constraint can be a specific link.



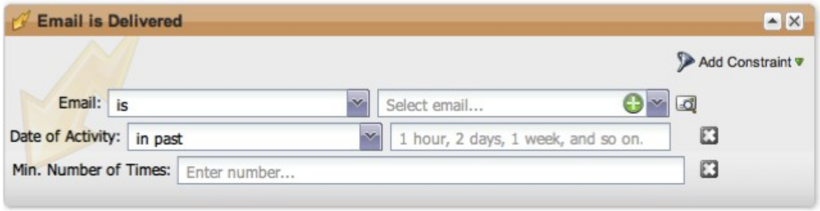
Clicks Link in Sales Email

When someone clicks a link in a Sales Insight Email.



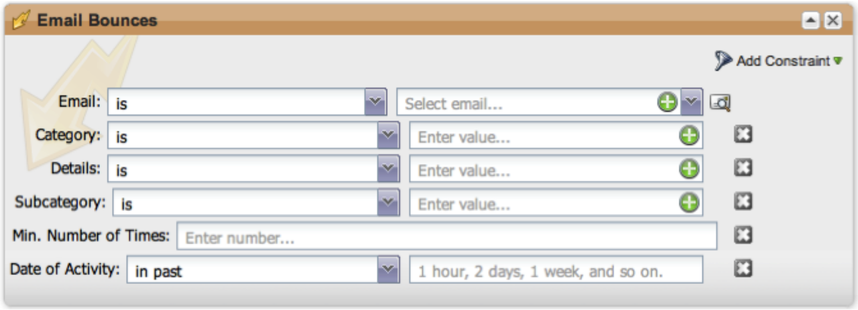
Email is Delivered

When Marketo receives a "`Delivered`" response from the target email server. (This does not happen 100% of the time).



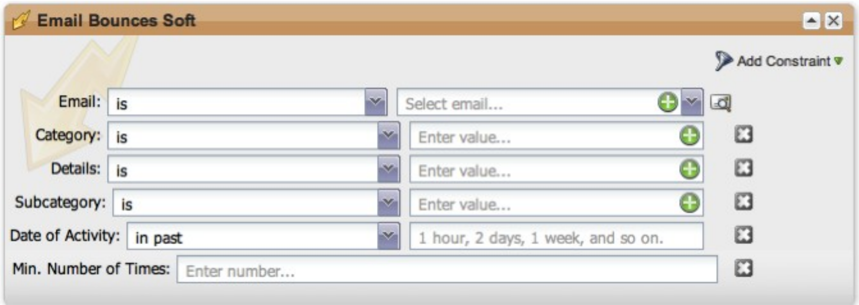
Email Bounces (hard)

When an email bounces hard. You may want to activate an email cleaning flow for hard bounced email addresses.



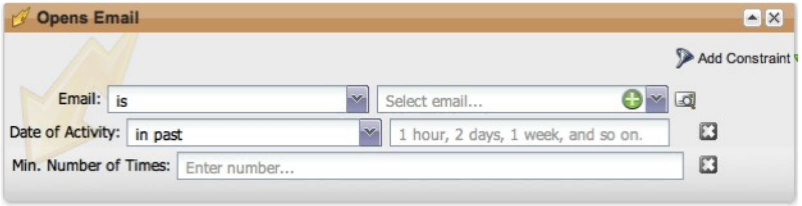
Email Bounces Soft

Triggers when an email bounces soft (out of office, mailbox full, temporary errors). You could then `Marketing Suspend` soft bounced leads if they soft bounce more than 3 times in a 30 day period.



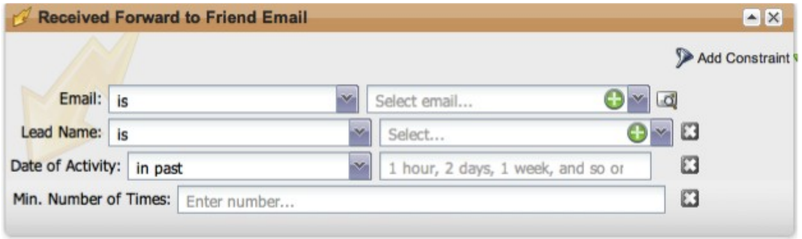
Opens Email

When an Email is opened by the Lead. Does not work if target email viewer has images turned off. Use Clicks Link as a better measure of engagement.



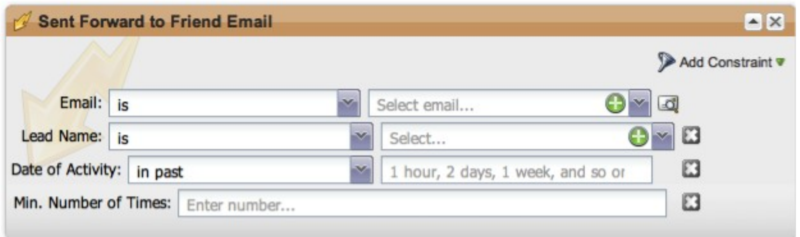
Received Forward to Friend Email

The friend receives the forwarded email from Marketo based on the `Delivered` status. Returns the Lead who received the forwarded email.



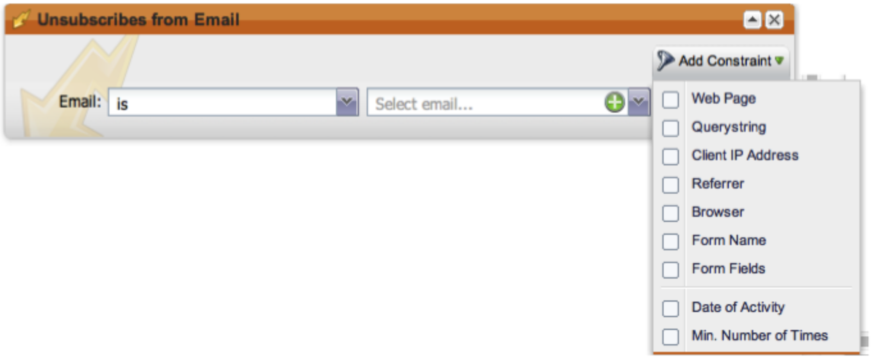
Sent Forward to Friend Email

A Lead forwarded an email to a friend. Returns the Lead who forwarded the email.



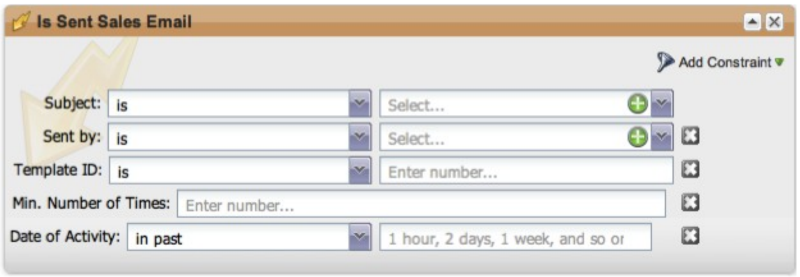
Unsubscribes from Email

The lead unsubscribes from any or a particular email. They must use the default unsubscribe link for this to trigger.



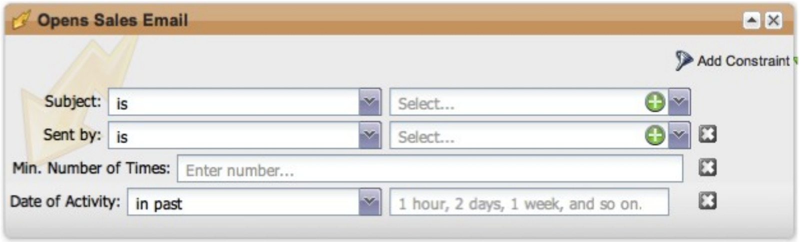
Is Sent Sales Email

When a lead is sent an email via Sales Insight.



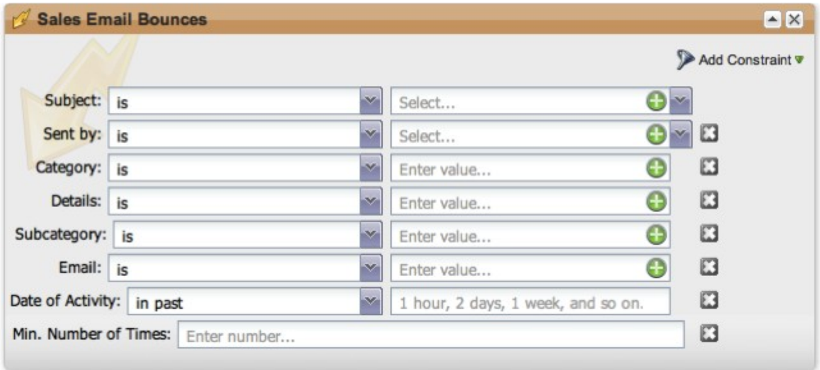
Opens Sales Email

When a Lead Opens a Sales Insight email. Again, may not be 100% accurate if the target's email images are off.



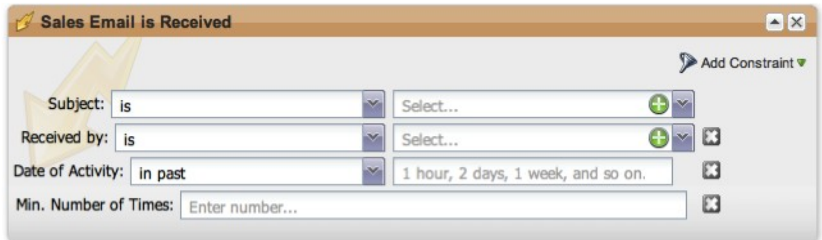
Sales Email Bounces

When a Sales Insight email bounces for any reason. You could then `Send Alert` to the `Lead Owner`.



Sales Email is Received

When a Sales Insight email is received, based on Delivered status. This can also be triggered through the Marketo Outlook plugin.

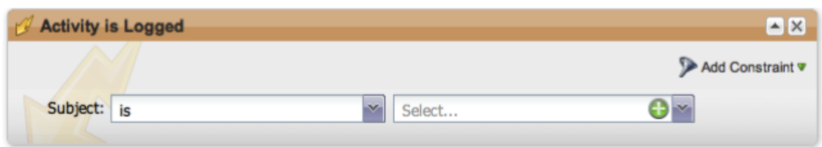


Salesforce Triggers

These are triggers specific to SFDC changes or actions.

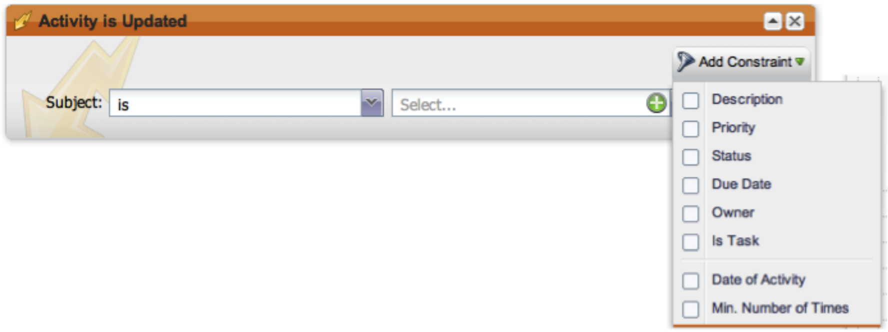
Activity is Logged

If an activity is logged in Salesforce, including Log a Call or Task Created. Can include Activities with past dates.



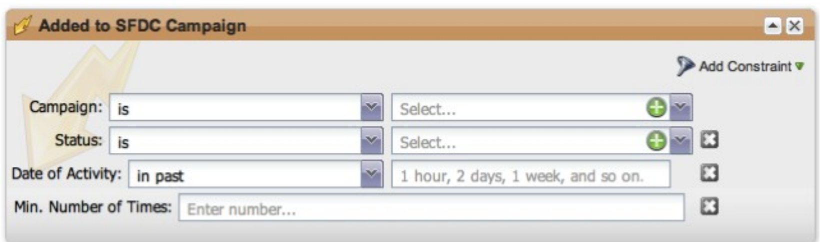
Activity is Updated

Whenever a previously created Activity is updated.



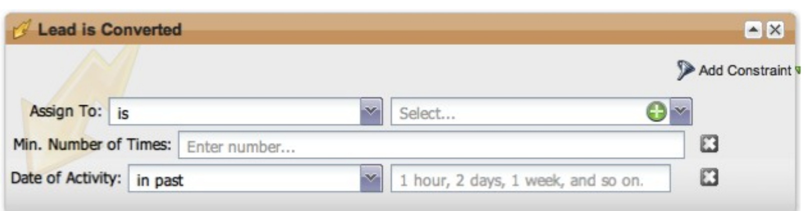
Added to SFDC Campaign

Whenever a Lead is added to a SFDC Campaign in SFDC or via Marketo.



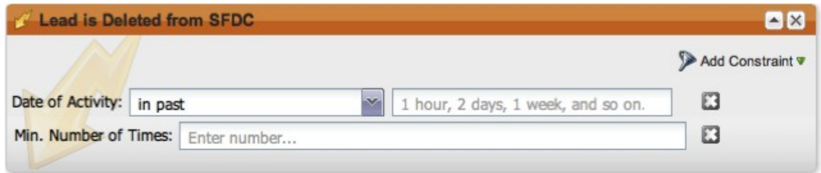
Lead is Converted

Lead is Converted to a Contact in SFDC. Can be initiated by SFDC or Marketo.



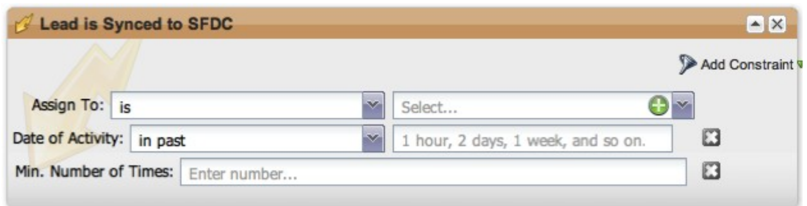
Lead is Deleted from SFDC

Whenever a Lead is Deleted from SFDC. Will show the `Is Deleted in CRM = True` status.



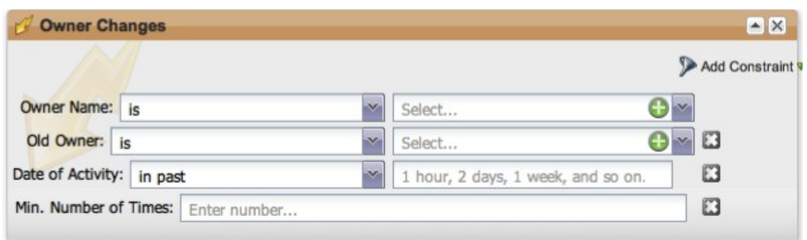
Lead is Synced to SFDC

Whenever a Lead is successfully synced to SFDC.



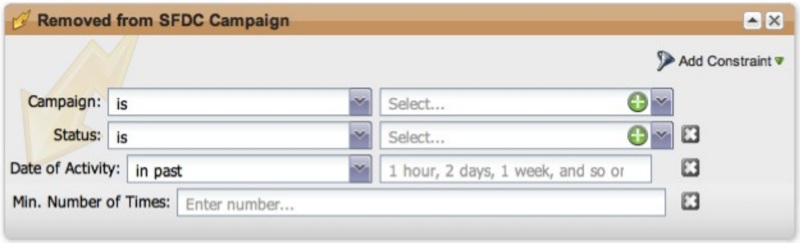
Owner Changes

Whenever the SFDC Owner Changes.



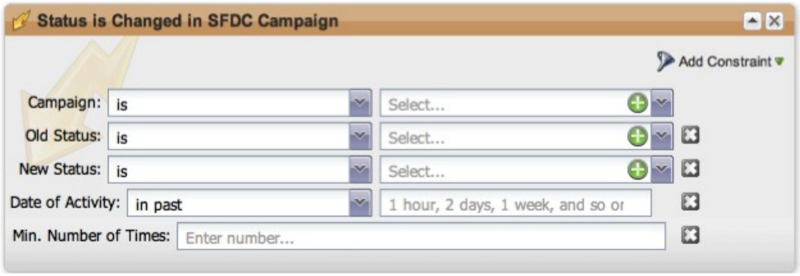
Removed from SFDC Campaign

Whenever a Lead is removed from the SFDC Campaign.



Status is Changed in SFDC Campaign

Whenever a Lead's Campaign Member Status changes in an SFDC Campaign.

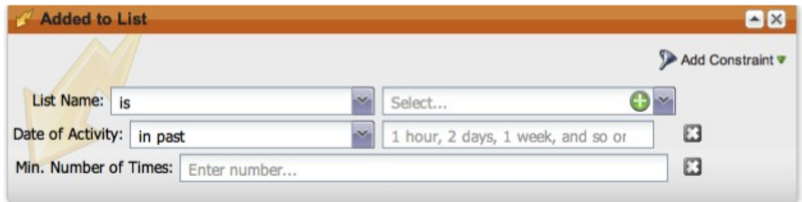


Marketo Standard Triggers

These are Marketo specific triggers.

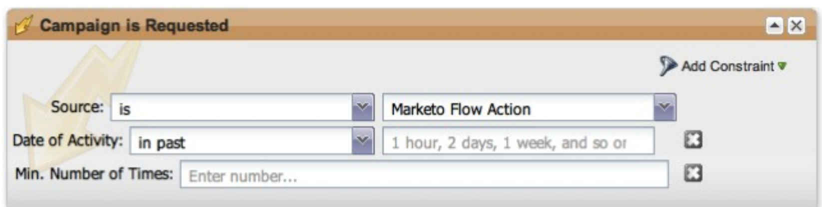
Added to List

Whenever a Lead is added to a Static List.



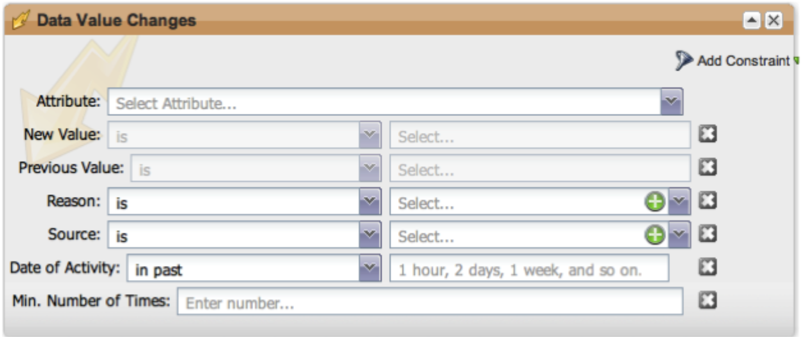
Campaign is Requested

Whenever a Smart Campaign is Requested by another Campaign, etc. Useful for nurturing and traffic cops.



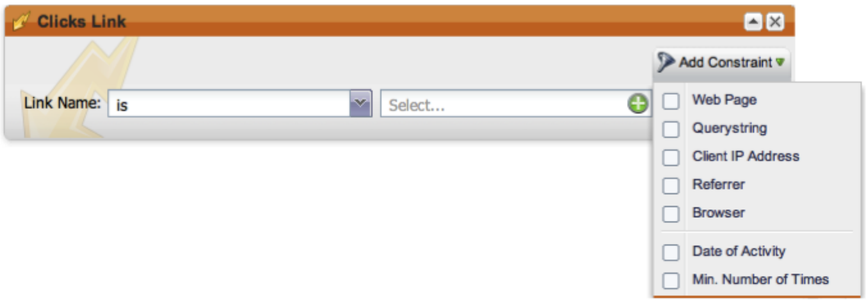
Data Value Changes

Whenever the selected Field's value changes. This is one of the most versatile and valuable triggers because you can select any available editable field. Use this to initiate all sorts of campaigns including scoring and nurturing.



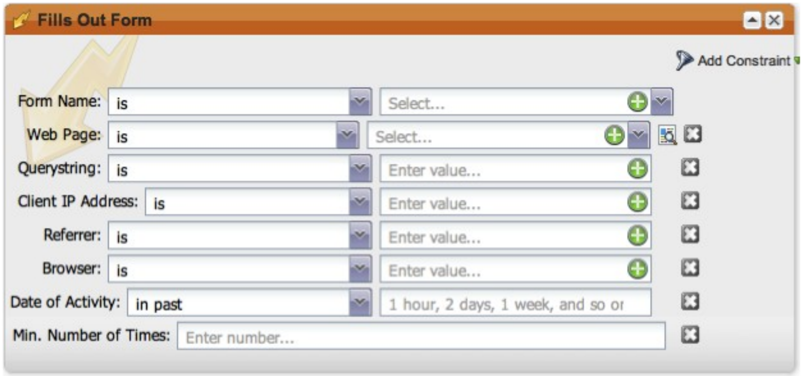
Clicks Link

Whenever a Lead clicks a Link on your Website or a Marketo Landing Page. This is not for Emails.



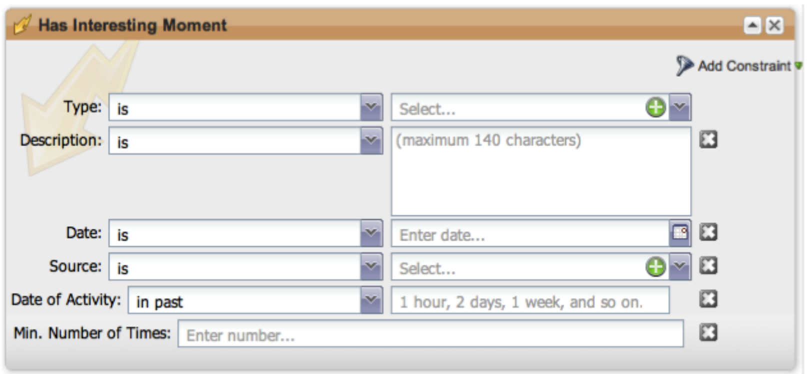
Fills Out Form

One of the most helpful triggers. Acts whenever someone Fills Out a Form. Recommended constraint is `Web Page`. Become familiar with this trigger because it is the one you will use the most. Use it to trigger a webinar or event registration, or even a series of follow up emails after a whitepaper download.



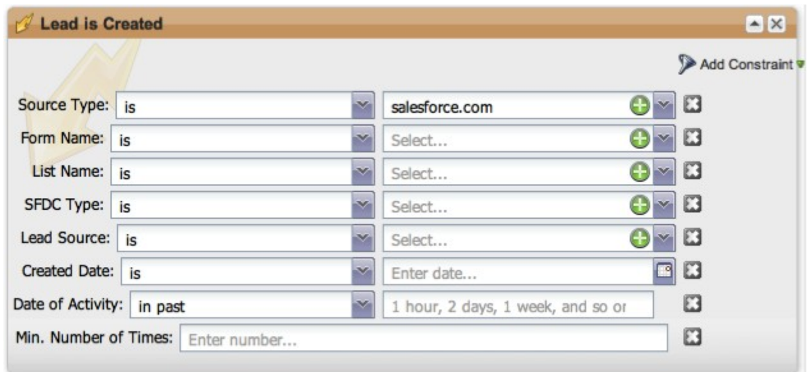
Has Interesting Moment

Whenever a Flow creates an `Interesting Moment` on a record. You can use this even if Sales Insight is not available, but the Interesting Moment will not sync to your CRM.



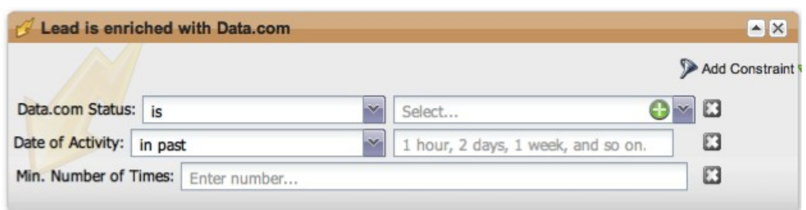
Lead is Created

Whenever a `Lead is Created` in Marketo. Recommended constraint is `Source`.



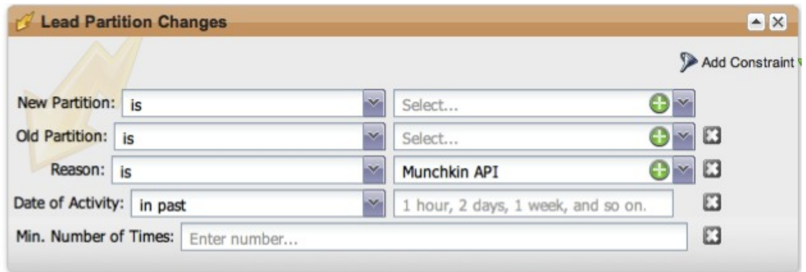
Lead is Enriched with Data.com

Whenever a Lead is Enriched with the Data.com flow action, you may want to resync the Lead.



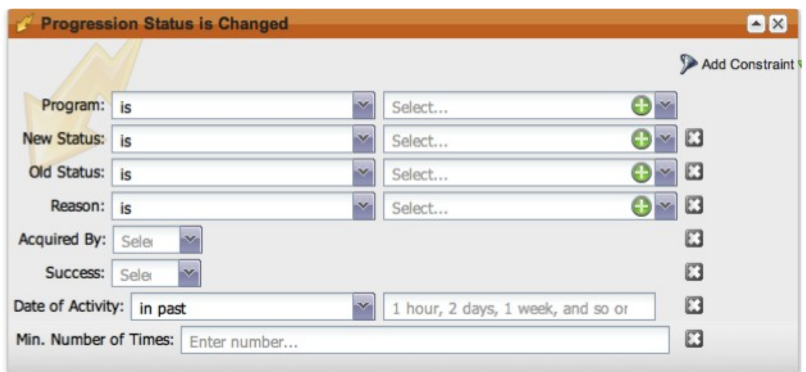
Lead Partition Changes

Whenever the Lead's Partition Changes, e.g. if the Lead is moved between Partitions because of the Flow action `Change Partition`.



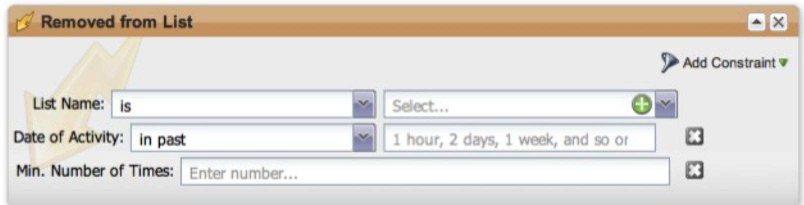
Progression Status is Changed

Whenever a Lead's `Progression Status` changes in any Program. It is good to use the Program Name constraint to avoid misfires.



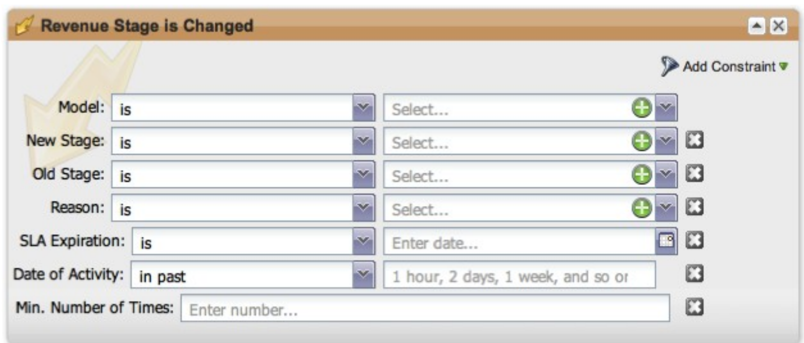
Removed from List

Whenever a Lead is Removed from a Static List.



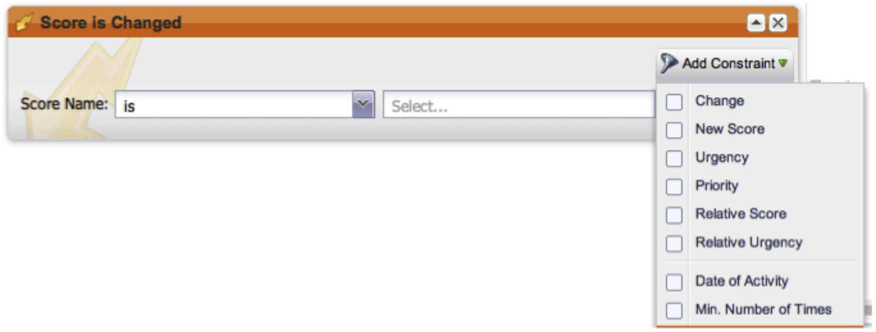
Revenue Stage is Changed

Whenever the Lead's `Revenue Stage` changes. This is only used if you have built a `Revenue Cycle Model`, have activated it, and are taking actions based on the Revenue Stage.



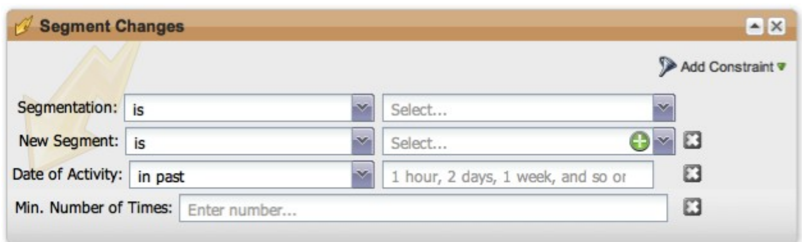
Score is Changed

Whenever the selected `Score` field has a changed, this will fire. I do not recommend using this because of the missing `Old Score` constraint. Use `Data Value Changes` instead.



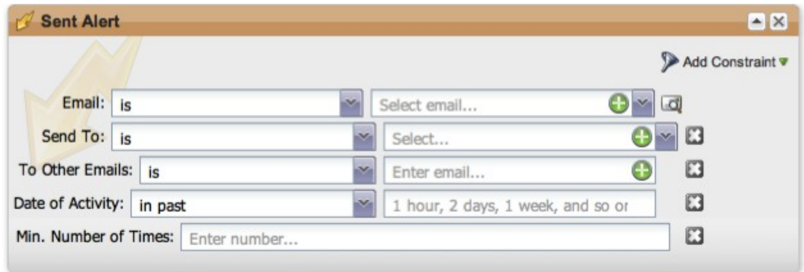
Segment Changes

Whenever a Lead's Segment changes.



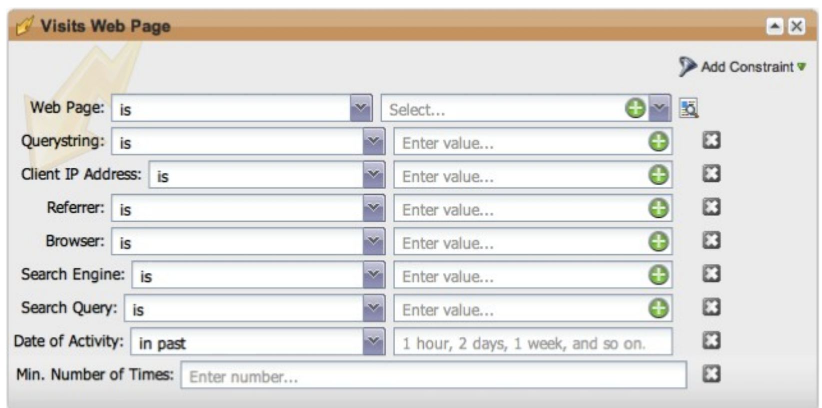
Sent Alert

Whenever an Alert is sent on behalf of a Lead.



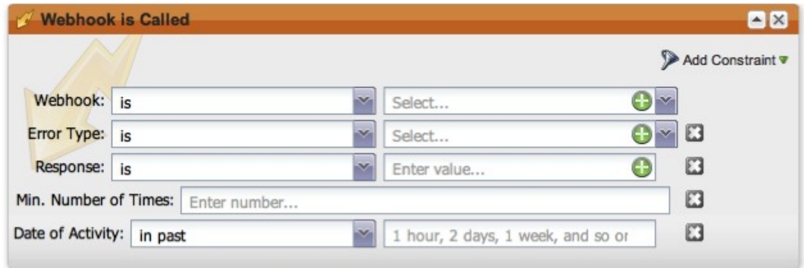
Visits Web Page

Whenever a Lead Visits a Web Page where the Marketo Munchkin code resides. If you aren't tracking the page, you can't trigger it here. You can use URLs or Marketo Landing Pages. For non-Marketo pages, remove "`http://`" from all inserted links or it won't work. For Marketo Pages, use the Landing Page Name.



Webhook is Called

Requires Webhooks to be active.



Filters and Constraints

Because each implementation is unique to a business, it will be impossible to list all the possibilities. Any field you have in your CRM which Marketo can see will become a Filter available to you. Marketo also has Activity filters based on what a lead does. These are available to all users. This reference section will show you each filter with its Constraints when possible. Some filters show selected Constraints while others show the Constraints menu.

Lead History

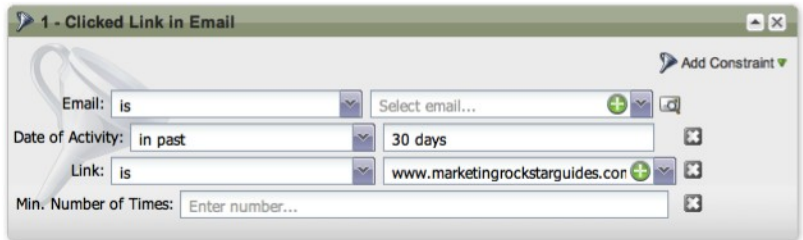
These are analogous to the Marketo Standard Triggers, but these filter actions already happened; thus, the names use the past tense or "Was."

Email History (includes Sales Insight)

I include all email related triggers here, although Sales Insight triggers are shown in the Salesforce folder.

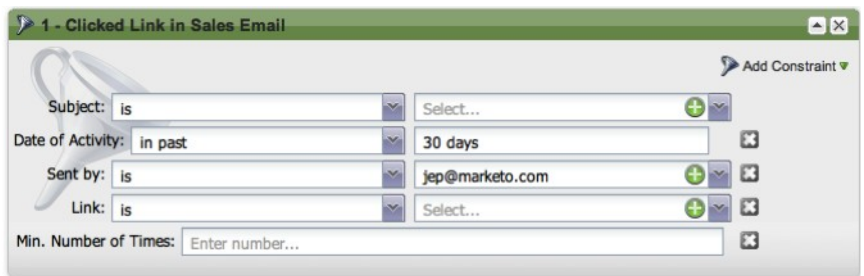
Clicked Link in Email

Returns Leads who clicked a particular link. Constraint can be a specific link.



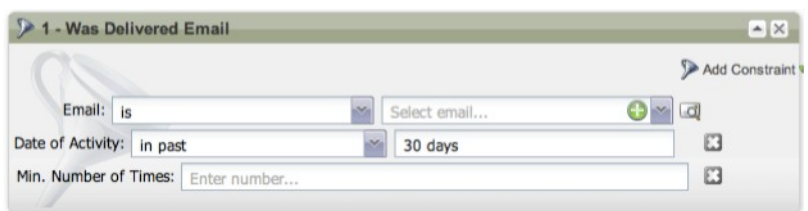
Clicked Link in Sales Email

Returns leads who clicked a link in a Sales Insight Email.



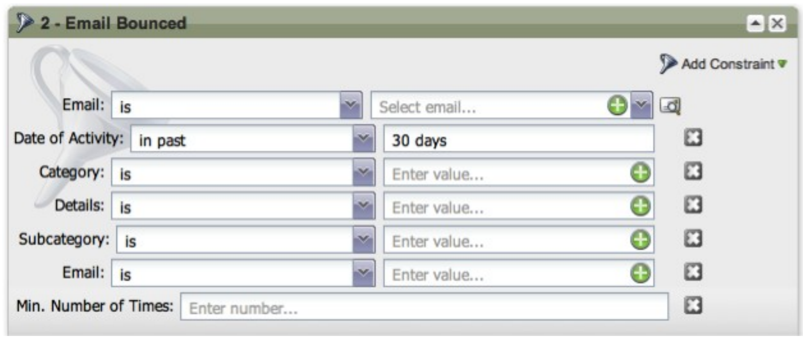
Was Delivered Email

Returns Leads who received a particular Email. When Marketo receives a "Delivered" response from the target email server. (This does not happen 100% of the time).



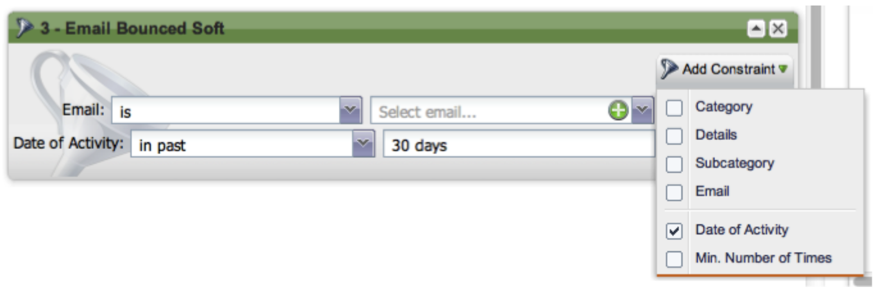
Email Bounced (hard)

Returns Leads who had an email bounce hard. You can further analyze the lead by Subcategory of bounce error or the minimum number of times.



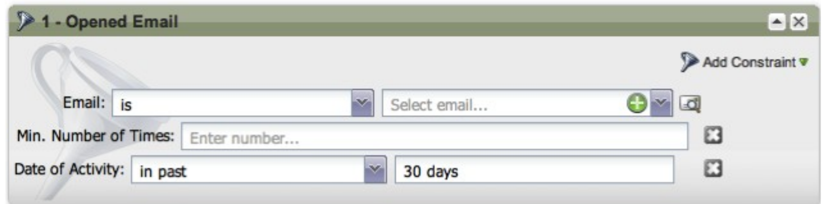
Email Bounced Soft

Returns Leads who had an Email bounce soft (out of office, mailbox full, temporary errors).



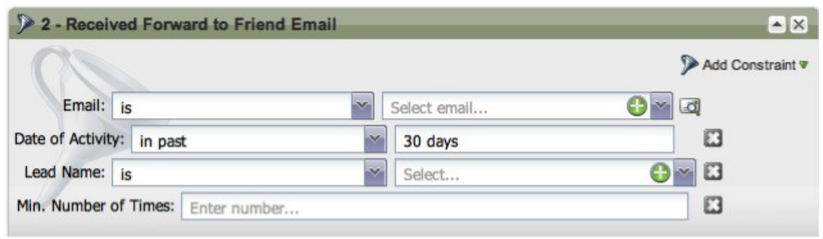
Opened Email

Returns Leads who opened an Email. Does not work if target email viewer has images turned off. Use Clicks Link as a better measure of engagement.



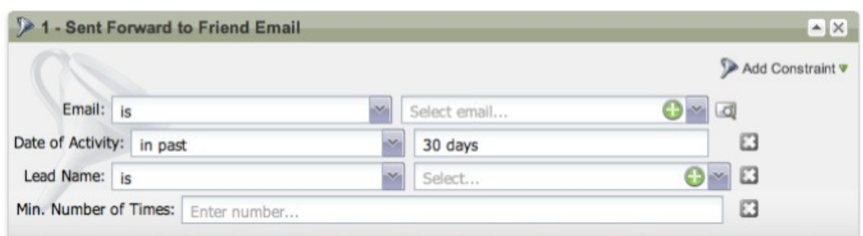
Received Forward to Friend Email

Returns the Lead who received the forwarded email. The friend received the forwarded email from Marketo based on the `Delivered` status. You can further refine by the name of the Lead, Date of Activity, or Number of Times.



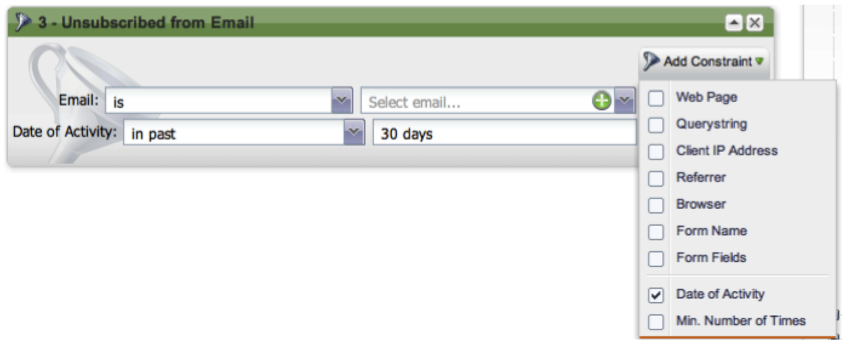
Sent Forward to Friend Email

Returns Leads who forwarded the Email to a Friend.



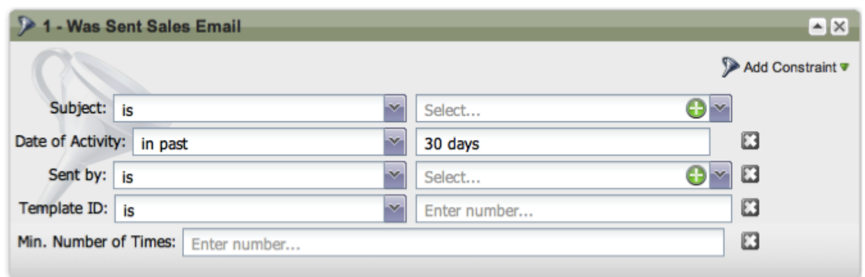
Unsubscribed from Email

Returns leads who unsubscribed from a particular email. They must use the default unsubscribe link for this to trigger.



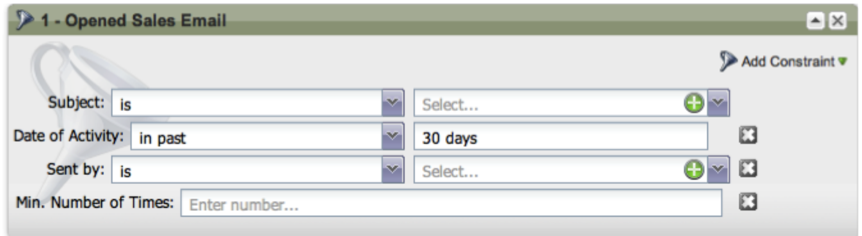
Was Sent Sales Email

Returns Leads who were sent an email via Sales Insight. You can further refine the search by `SFDC Template ID` and the email of the sender using `Sent by.`



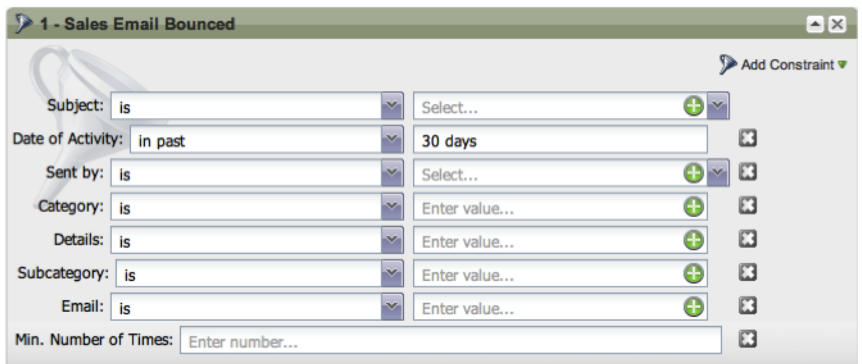
Opened Sales Email

Returns Leads who opened a Sales Insight email. Again, may not be 100% accurate if the target's email display images are off.



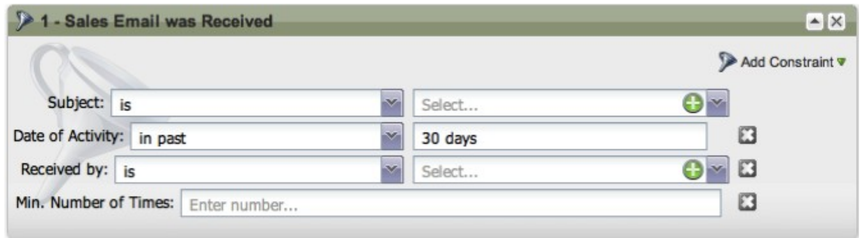
Sales Email Bounced

Returns Leads who had a Sales Insight email bounce for any reason.



Sales Email Was Received

Returns Leads who a Sales Insight email is received, based on Delivered status. This can also be triggered through the Marketo Outlook plugin.

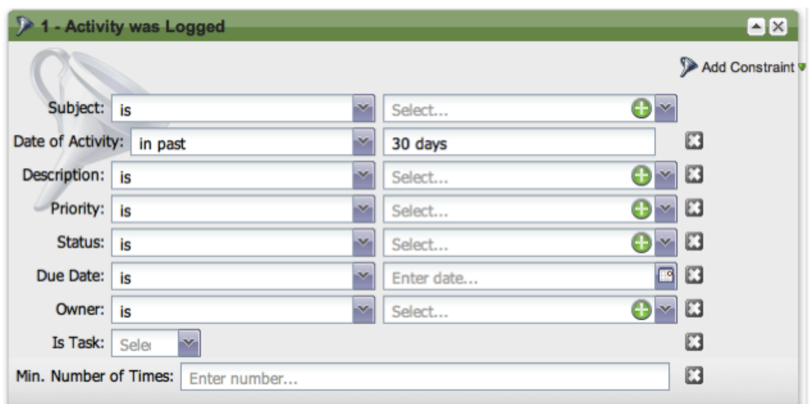


Salesforce Filters

These are triggers specific to SFDC changes or actions.

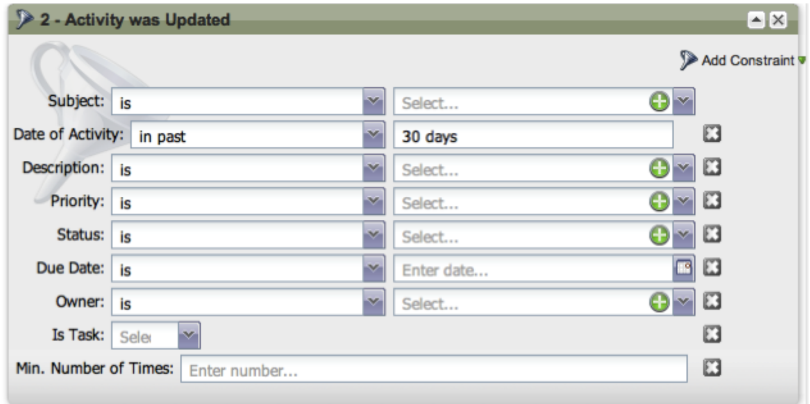
Activity Was Logged

Returns Leads who had a matching Activity logged in Salesforce, including Log a Call or Task Created. Can include Activities with past dates. Note how you can search by Subject or Description using different Operators.



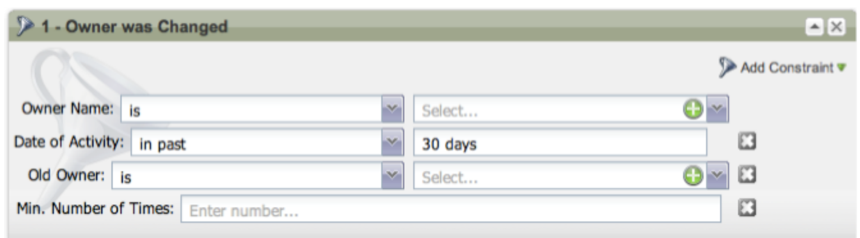
Activity Was Updated

Returns Leads who had a previously created Activity changed.



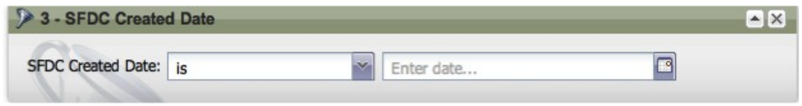
Owner Was Changed

Returns Leads who had an SFDC Owner Change.



SFDC Created Date

Returns Leads matching the SFDC Created Date criteria. This is when the Lead was created in Salesforce—not in Marketo.

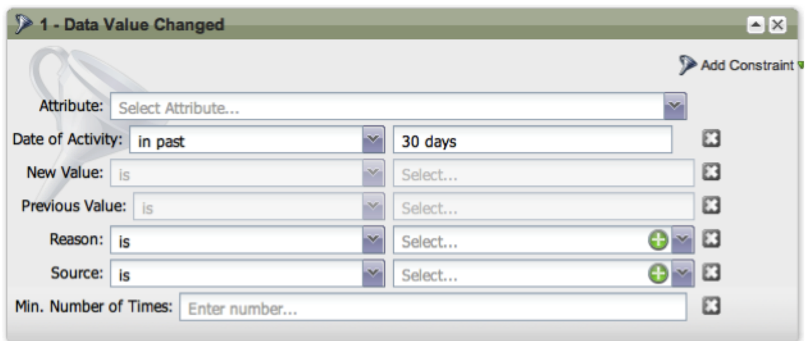


Marketo Standard Filters

These are Marketo specific filters.

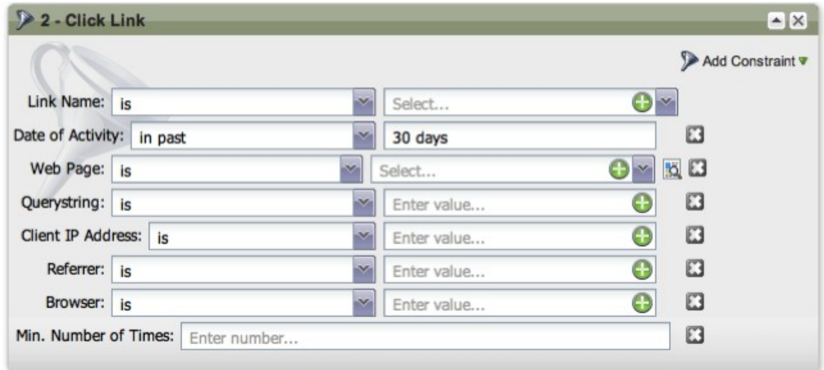
Data Value Changed

Returns Leads with the selected Field's value changes. You can select any available field that can change. You can use the Reason constraint here to target how the data value changed.



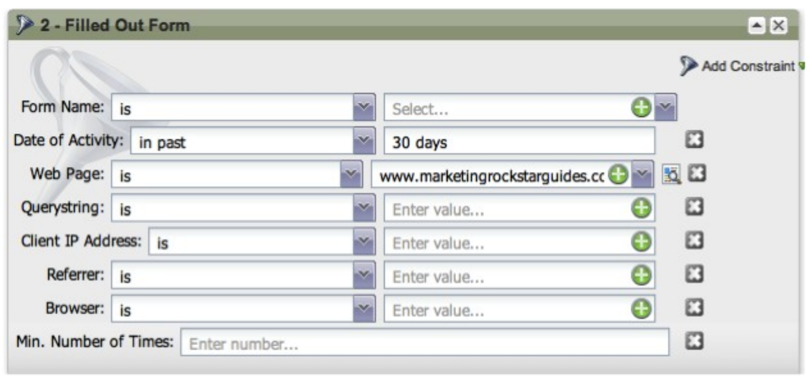
Click Link

Returns Leads who clicked a Link on your Website or a Marketo Landing Page. This is *not* for Emails.



Filled Out Form

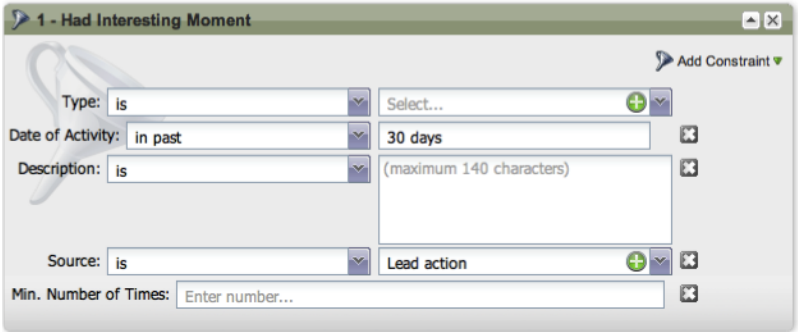
One of the most helpful filters. Returns Leads who Filled Out a Form. Recommended constraint is `Web Page`. You could use `Querystring` or Referrer to identify sources of leads: ads, partners, etc.



If you use this filter in a Choice Step, [it cannot be constrained by date](), so Marketo will match *any* Lead who filled out that form at any point in time. Thus, you may need to constrain your Smart List to a specific Form(s) to ensure the correct result.

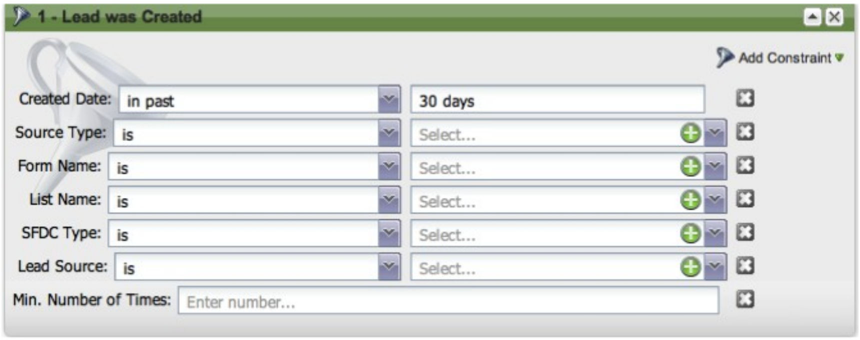
Had Interesting Moment

Returns Leads who had a particular Interesting Moment. You can use this even if Sales Insight is not available in SFDC. Note how you can search the Description field for any value.



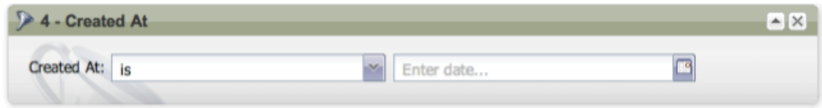
Lead Was Created

Returns Leads *created in Marketo* within a time period and any other matching constraints. Recommended constraint is Source. You may find this helpful when identifying records from shows, errors, or certain sources.



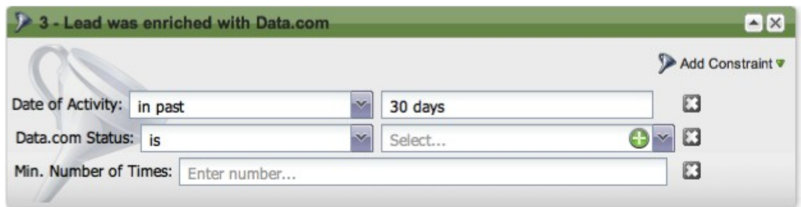
Created At

Returns Leads created on or within particular dates.



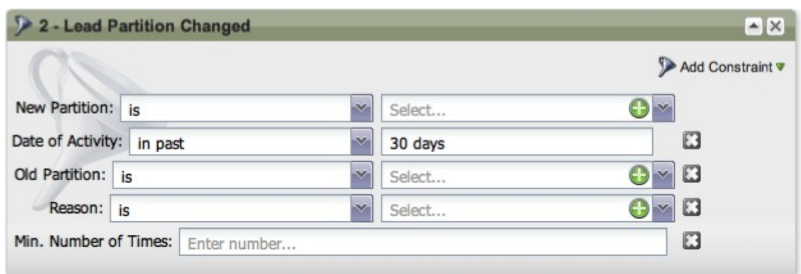
Lead is Enriched with Data.com

Returns Leads enriched by Data.com.



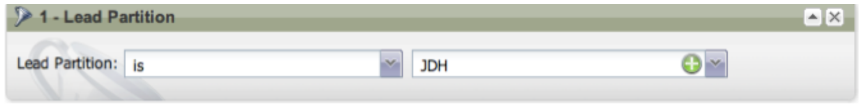
Lead Partition Changed

Returns Leads which moved partitions.



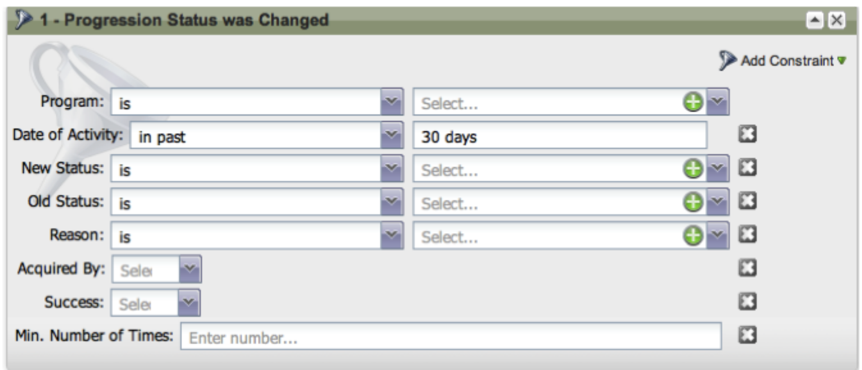
Lead Partition

Returns Leads from a particular Partition.



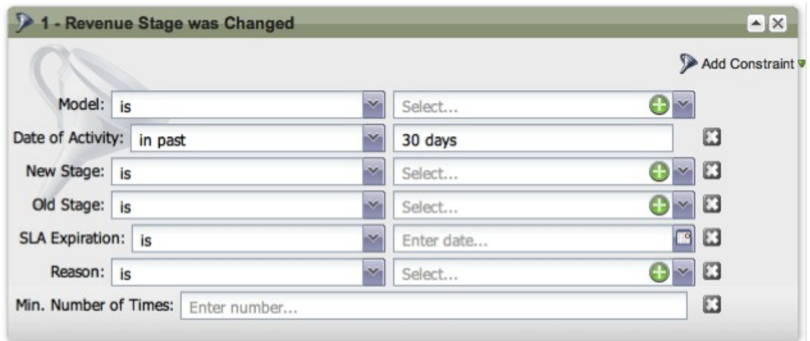
Progression Status Was Changed

Returns Leads whose `Progression Status` changed in any Program. Use the Program Name constraint to avoid incorrect lists.



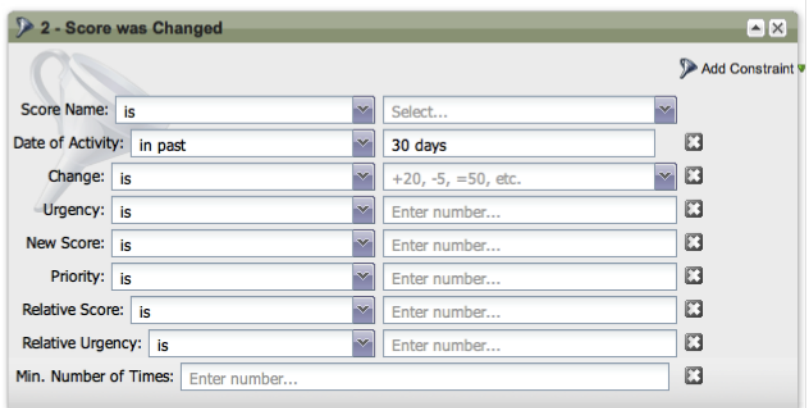
Revenue Stage Was Changed

Returns Leads whose Revenue Stage changed. This is only used if you have built a Revenue Cycle Model, have activated it, and are taking actions based on the Revenue Stage.



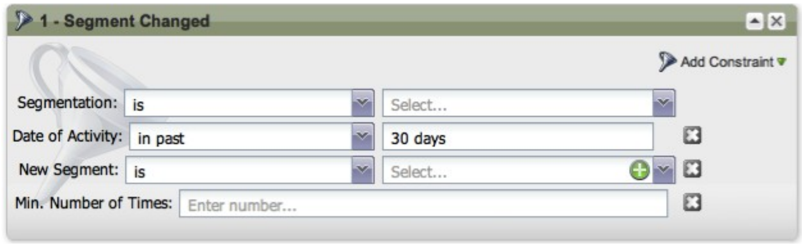
Score Was Changed

Returns Leads whose selected `Score` field has a changed. You may find `Data Value Changed` to be a better filter since it allows the `Old Value` constraint.



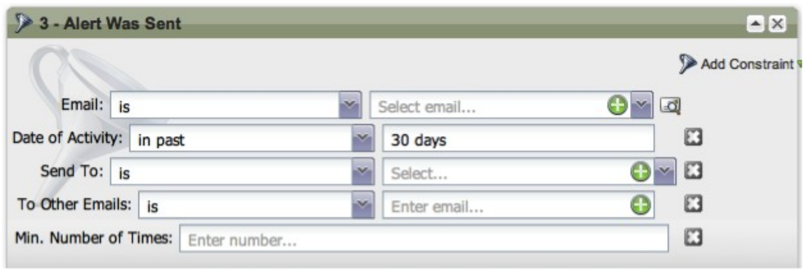
Segment Changed

Returns Leads which moved Segments.



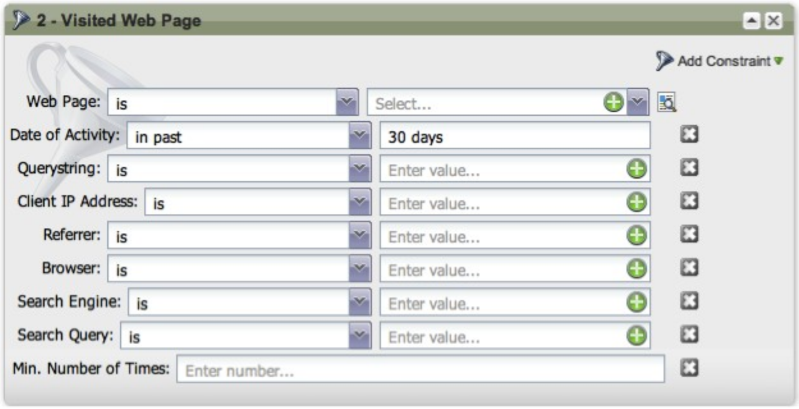
Alert Was Sent

Returns Leads who had an Alert sent on their behalf.



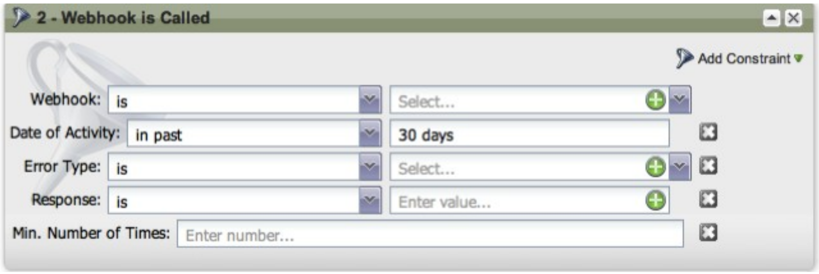
Visited Web Page

Returns Leads who visited a tracked web page. For Marketo Pages, use the Page Name. For non-Marketo pages, remove "http://" for best results.



Webhook is Called

Requires Webhooks to be active. Returns Leads which match criteria. Will return 0 Leads if no webhooks were used.

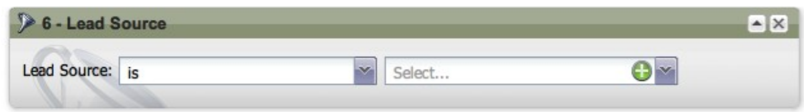


Lead Attributes

This is a list of common field filters you will see in your Marketo instance. Marketo automatically creates filters based on the fields visible to the Marketo User in Salesforce. Thus, you will see many more filters available to you because each business has different requirements. Once you know these, you will understand how to use your own field filters.

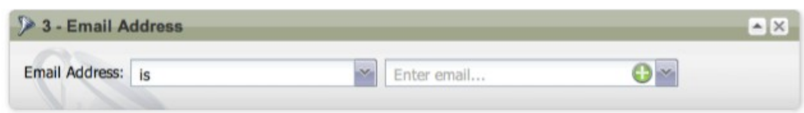
Lead Source

Returns Leads matching the chosen Source criteria. Existing values will appear as a picklist.



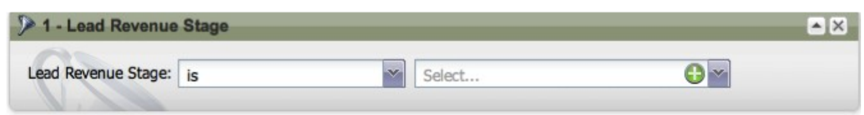
Email Address

Returns Leads with the matching Email Address criteria. Use `CONTAINS "@domain.com"` to bring up leads matching a particular domain.



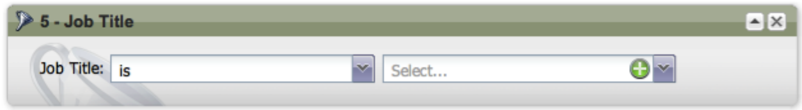
Lead Revenue Stage

Returns Leads currently in a certain Revenue Stage.



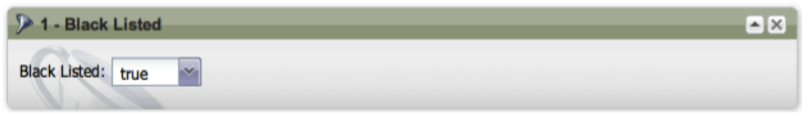
Job Title

Returns Leads matching the title criteria. This is also a good place to use operators such as `STARTS WITH`, `CONTAINS`, or `NOT CONTAINS`.



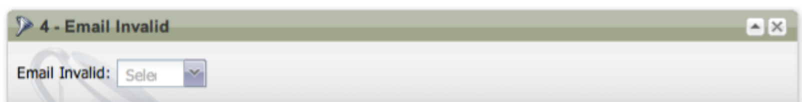
Black Listed

When set to `True`, Marketo will always block this lead from any Send Email flow action. Use this to block Competitors or other bad leads from ever receiving email.



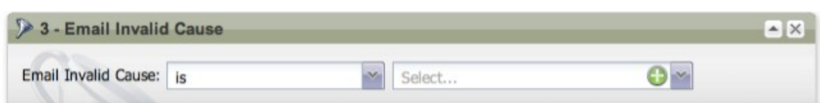
Email Invalid

Marketo will set this to `True` automatically when the Hard Bounce response is "Email Incorrect." The email will not be suspended or invalidated if the Hard Bounce code relates to a technical issue.



Email Invalid Cause

If the cause is available, Marketo will show it here. Usually a returned SMTP error code in the 500 range.

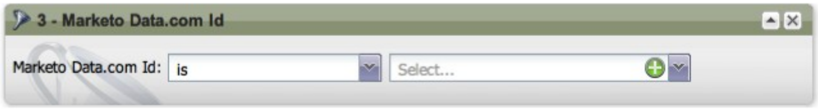


Marketing Suspended

A temporary email suspension you can control with a Flow action. The duration is up to your Flow. Leads with `Marketing Suspended = True` cannot receive email regardless of their subscription preferences.

Marketo Data.com ID

The Data.com ID for that Lead if it matches one in Data.com.



Marketo Data.com Status

If the Lead was Enriched With Data.com.

Marketo Sync Indicator

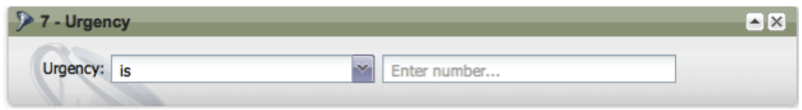
If `True`, indicates the Lead was synced with Marketo.

Relative Score

The `Relative Score` drives the Star icons in Sales Insight. Marketo calculates a Lead's score in relation to all other Leads' scores in the system.

Urgency

This field holds the `Urgency` score that Marketo determines based on the Lead's activity. The number is usually below 1.0, representing a proprietary Marketo calculation.

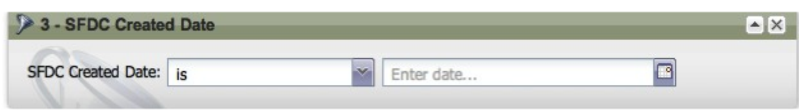


Relative Urgency

`Relative Urgency` is determined by Marketo and is based on the change in `Lead Score` and `Urgency` over time. Higher activity and a steeper change in `Lead Score` in a short period will raise the `Relative Urgency`. This field drives the three Flame icons in Sales Insight. The number is usually between 0 – 3.

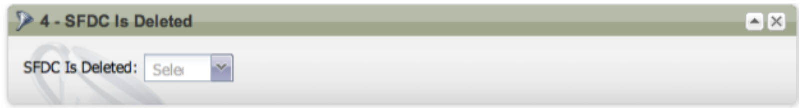
SFDC Created Date

The date the Lead was created in Salesforce, which may be different from the `Created At` Marketo time.



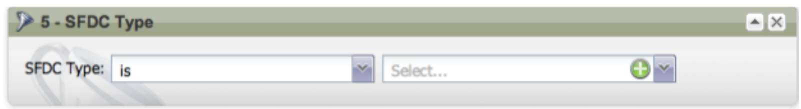
SFDC Is Deleted

A True/False flag. If `SFDC Is Deleted = True`, then the Lead was deleted in the CRM, but not in Marketo.



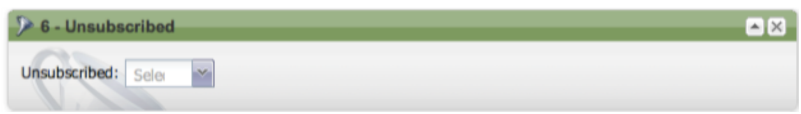
SFDC Type

The type of record in SFDC. Marketo can show you `Lead`, `Contact`, or `User` in this filter. You may see others if your SFDC has a non standard setup.



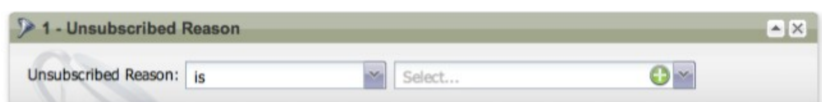
Unsubscribed

This is the master Unsubscribe flag (True/False) in Marketo. It is automatically tied to the Email Opt Out field in Salesforce. Any Lead with `Unsubscribed = True` cannot receive a non-operational email. You may want to enable field history tracking on this field in SFDC.



Unsubscribed Reason

Provides a system reason for the `Unsubscribed = True`. Typically a Form Fill Out or Flow Action.



Updated At

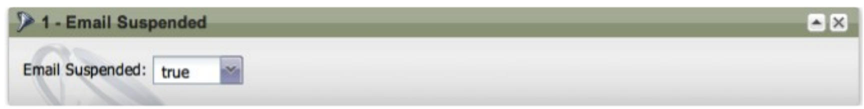
The last time the Lead was updated in Marketo. This could be from a Form Fill Out or a Flow action.

System and Web Source Filters

These filters reference Marketo System fields. You cannot adjust these. The Inferred and Original filters receive a value only the first time a Lead visits your site, regardless of the Lead’s original source.

Email Suspended (System)

Marketo will suspend an email address for up to 24 hours when it receives a hard bounce like anti-spam block.

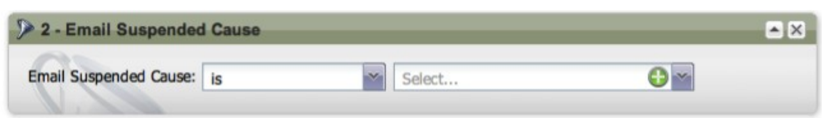


Email Suspended At (System)

The time and date of suspension.

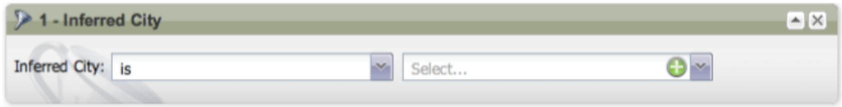
Email Suspended Cause (System)

If the cause is available, Marketo will show it here. Usually a returned SMTP error code in the 500 range.



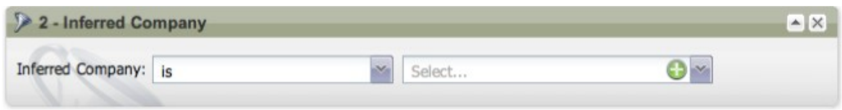
Inferred City

Shows the inferred IP City Name if Marketo was able to extract it from a visitor.



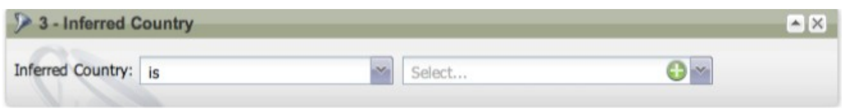
Inferred Company

Shows the inferred IP Company Name if Marketo was able to extract it from a visitor. This may show the ISP instead of the Lead's actual firm.



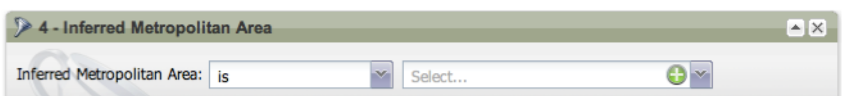
Inferred Country

Shows the inferred IP Country Name if Marketo was able to extract it from a visitor.



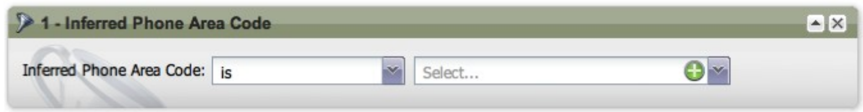
Inferred Metropolitan Area

Shows the inferred IP Metro Area Name if Marketo was able to extract it from a visitor. (Usually US and Canada).



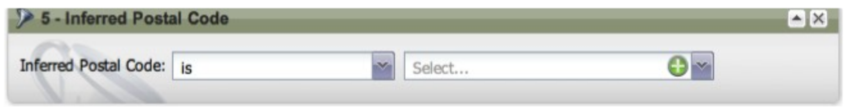
Inferred Phone Area Code

Shows the inferred IP Phone Area Code if Marketo was able to extract it from a visitor. (Usually US, Canada)



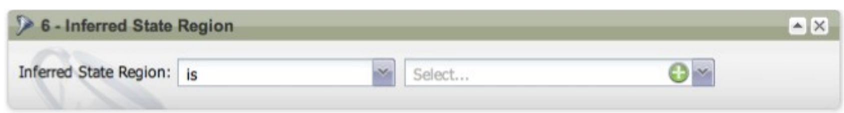
Inferred Postal Code

Shows the inferred IP Postal Code if Marketo was able to extract it from a visitor. (Usually US, Canada, UK, and Australia).



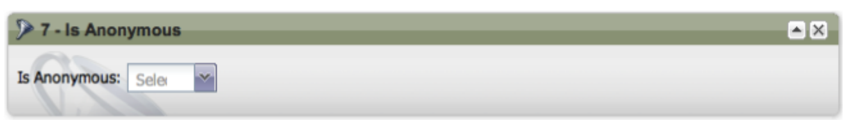
Inferred State Region

Shows the inferred IP possible State if Marketo was able to extract it from a visitor. (Usually US and Canada).



Is Anonymous

If `True`, this lead record is `Anonymous`, meaning Marketo only is tracking behavior and the Lead has not yet identified himself via a Form Fill Out. Useful for filtering out counts on behaviors. These leads are *never* synced to SFDC.

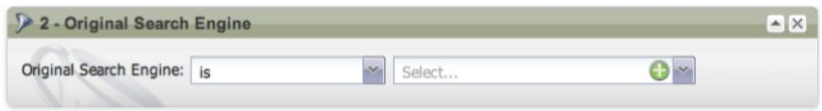


Original Referrer

Shows the previous page or domain visited prior to your site.

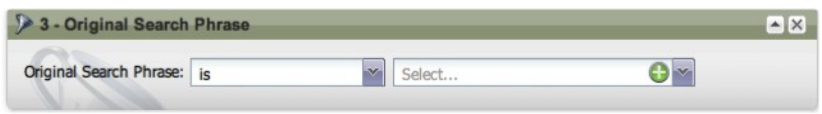
Original Search Engine

The search engine, if any the Lead used to arrive at your site.



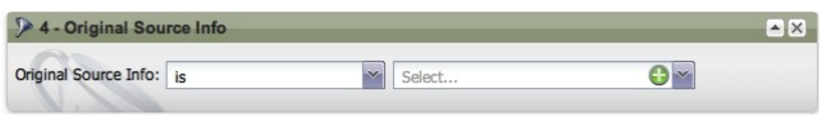
Original Search Phrase

The search phrase or keywords used to arrive at your site. Note: may be EMPTY or contain gibberish due to Google's policy of not passing the keywords from logged in Google Accounts. A useful filter to score on.



Original Source Info

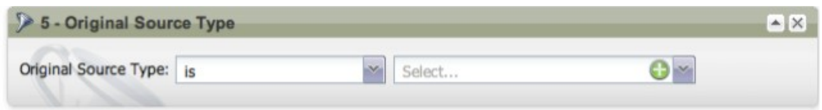
Contains details on the original method of entry into the system, such as the List Name.



Original Source Type

Automatically populated with the name of the [original method of entry to the system](#):

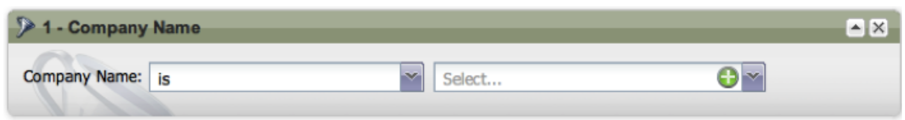
- `List Import`
- `New Lead` (created in Marketo)
- `Salesforce.com`
- `Web Page Visit` (Form)

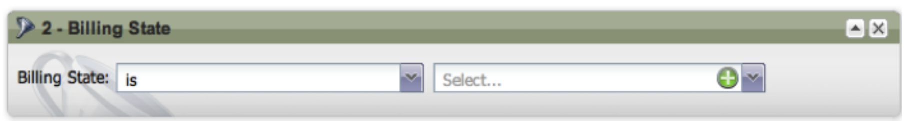


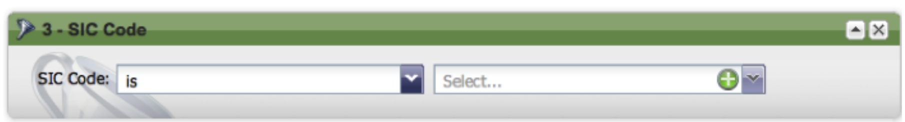
Will also help [identify Marketo only Leads](#).

Company Attributes

Company Attributes depend greatly on the fields you created on your Lead, Contact, and Account records in the CRM. Typical filters will include `Industry, Billing City, Num Employees`, and `Company Name`. Use these filters as you would any other field filter. Here are some examples:





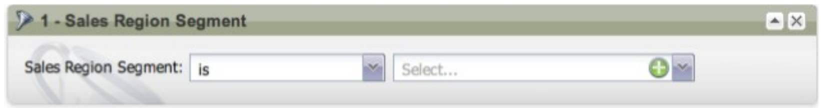


Segmentation Filters

This will only show filters for active Segmentations, which will allow you to select the Segment and any set of Leads within that Segment with valid Segmentations.

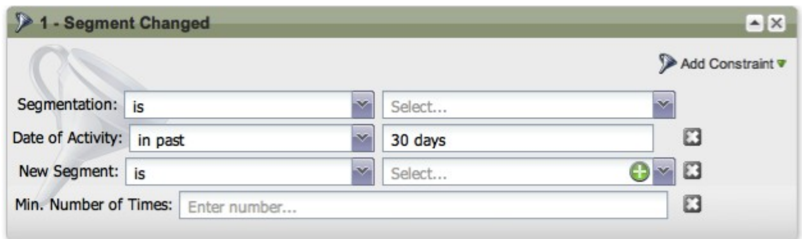
Segmentation X Filter

Returns Leads in the selected Segment of the chosen Segmentation.



Segment Changed

Returns Leads whose Segmentation membership changed along with any Constraints.

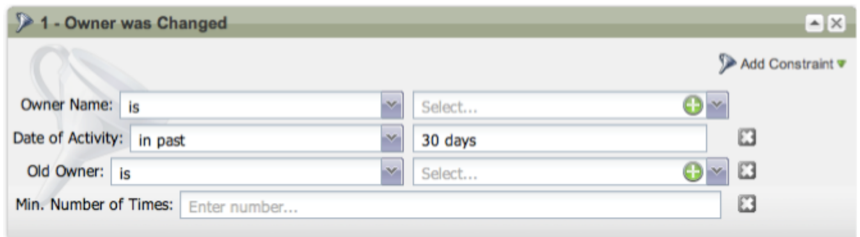


Salesforce Filters

These filters reference Sales Insight, Custom Object, and other special Salesforce fields. We will go over a few here which you may or may not see depending on your SFDC Setup

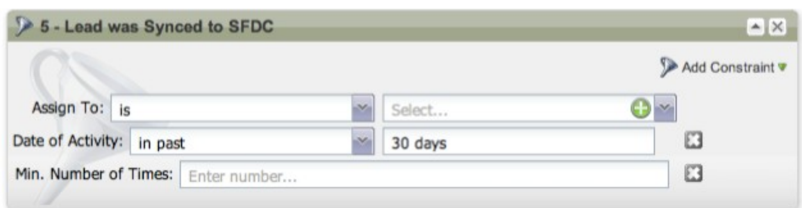
Owner Was Changed

Returns Leads who have a current Owner Name and, optionally, when they were last moved between Owners and who their Old Owner was. *Caution*: my experience has been this does not always work well.



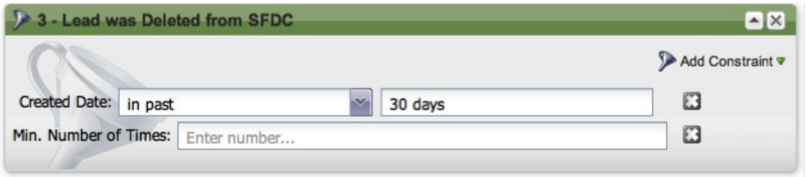
Lead Was Synced to SFDC

Assumes the Lead was already synced. Returns Leads who were synced to SFDC with any Constraints requested. Assign To can be set to one or more Owners or to `IS EMPTY` (Queue Owner) or `IS NOT EMPTY` (any Assignment).



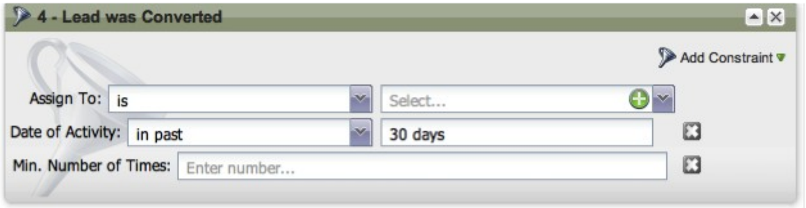
Lead Was Deleted from SFDC

Returns Leads who were deleted in SFDC, but who had a `Created Date` in a time range. This is different than `SFDC Is Deleted`.



Lead Was Converted

Assumes `Converted = True` and then Returns Leads who were Assigned and with Constraints: `Date of Activity and Min Number of Times`.



Member of SFDC Campaign

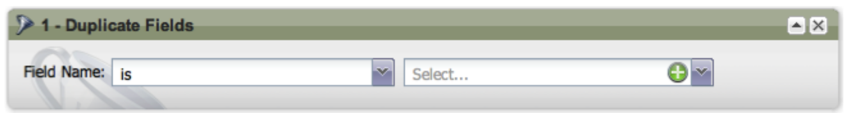
Returns leads who are members of the requested SFDC Campaign. Constraints include `Campaign Member Status Records: First Responded, Last Status, Has Responded, Status`.

Special Filters

The Special Filters include the Member filters that are critical to running Marketo as well as the special `Random Sample` and `Duplicate Fields`.

Duplicate Fields

You can use this filter as your own deduping system. The System List `Duplicate Leads` uses this filter with Email Address.



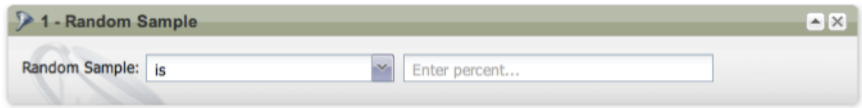
You can only match dupes using 5 fields:

- `Email Address`
- `Full Name`
- `Last Name`
- `SFDC Type`
- `Updated At`

The returned leads will match on the selected filter. You can only use one (1) Duplicate Fields filter per Smart List.

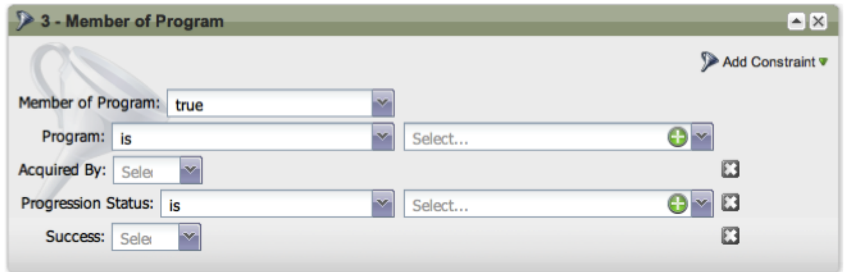
Random Sample

The Random Sample filter is a powerful tool when conducting AB Testing of Emails or groups of Leads. There is more on using this filter in the AB Testing Chapters. You can insert it at the end of any Smart List to take a Random Sample of X% of the returned leads. You may also use this in Choice Steps in a similar way.



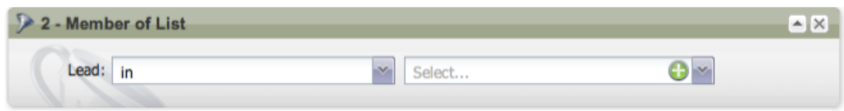
Member of Program

Returns leads who are members of the Program(s) with the Statuses selected. Or excludes with `Not In`.



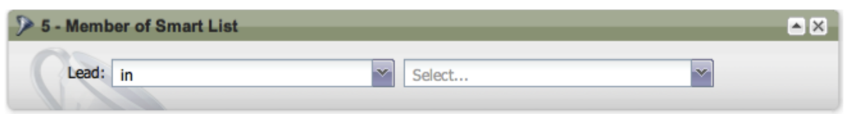
Member of List

Returns leads who are members of a particular list. Or excludes with `Not In`.



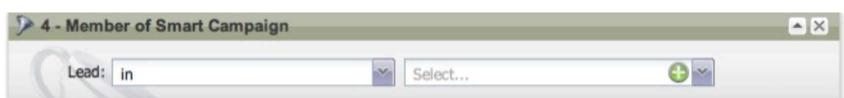
Member of Smart List

Returns leads in a selected Smart List. Or excludes with `Not In`.



Member of Smart Campaign

Returns Leads who *successfully qualified* and are in (or completed) the Smart Campaign chosen. Or excludes with `Not In`.



Inactivity Filters

Inactivity filters are the opposite of their corresponding positive filters. These are noted in the Inactivity Filter folder or as “`Not Was [Filter Name]`” It is important to understand the differences:

`Visited Web Page IS “www.marketingrockstarguides.com/about”`

Returns any Lead who visited this page.

`Not Visited Web Page IS “www.marketingrockstarguides.com/about”`

Returns any Lead who *never* visited this page, or the inverse of the positive filter.

But if you wanted to see Leads who visited any page *other than a specific page*, you should use the positive filter with the `IS NOT` operator.

`Visited Web Page IS NOT “www.marketingrockstarguides.com/about”`

You can think of these two activity filter types as `Was = Happened Already` and `Not Was = Never Happened`.

[Using Inactivity Filters with Lead Scores](#).

[Using Inactivity Not Opened Email](#) or [this article](#).

Opportunity Filters

Please view additional detail on this article.

Has Opportunity

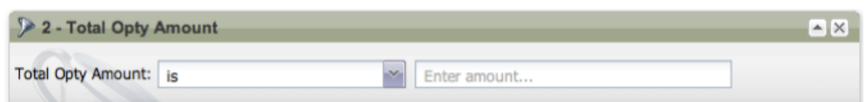
Returns a Lead with at least one Opportunity. Use the Constraints to narrow down the types of Opportunities to match for.

Number of Optys

Returns leads who match the criteria of number of attached Opportunities.

Total Opty Amount

Returns leads with matching Opportunity Amounts.

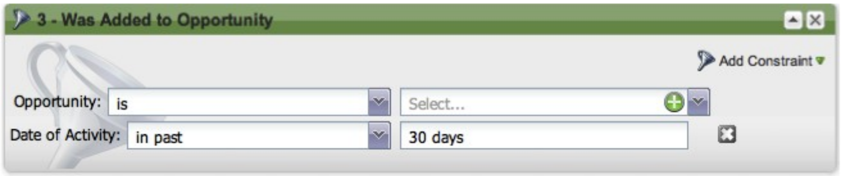


Total Opty Expected Revenue

Returns Leads with the matching Expected Revenue amount, assuming you are using this.

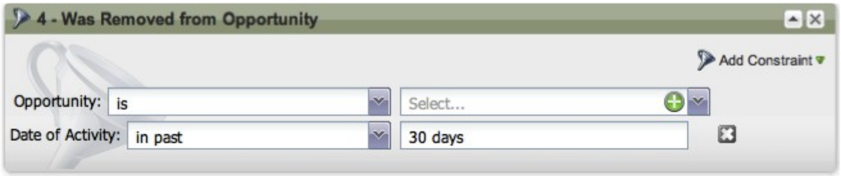
Was Added to Opportunity

Returns Leads who ever were added to a matching Opportunity.



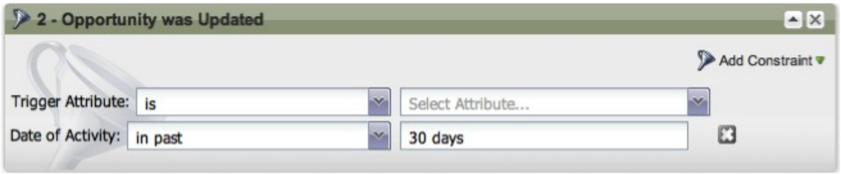
Was Removed from Opportunity

Returns Leads who ever were removed from a matching Opportunity.



Opportunity was Updated

Returns Leads with any Opportunity which had the Attribute changed during a certain time period. Use the Constraints to include additional Opportunity filters. The Trigger Attribute is a certain list of Opportunity fields.



Constraint Details

You probably saw a few unusual Constraints as options on Triggers or Filters. While most are pretty clear, a few are rarely used. Here are a few and how you could use them.

Reason

The Reason constraint (sometimes a filter like Email Invalid Cause) is a record of how something happened to a field. The constraint is available on these filters, allowing you to pinpoint causes of a change. This can be helpful in troubleshooting errors.

- Data Value Changed
- Lead Partition Changed
- Progression Status Was Changed
- Revenue Stage Was Changed

The Reason field may contain a number of values which will not appear unless that reason has occurred in your system. Here are a few:

- Synced from Salesforce.com
- Changed by Smart Campaign
- System Flow Action
- Form Fill Out
- SOAP API
- Munchkin API
- Manual lead edit
- Import
- Merge

Min. Number of Times

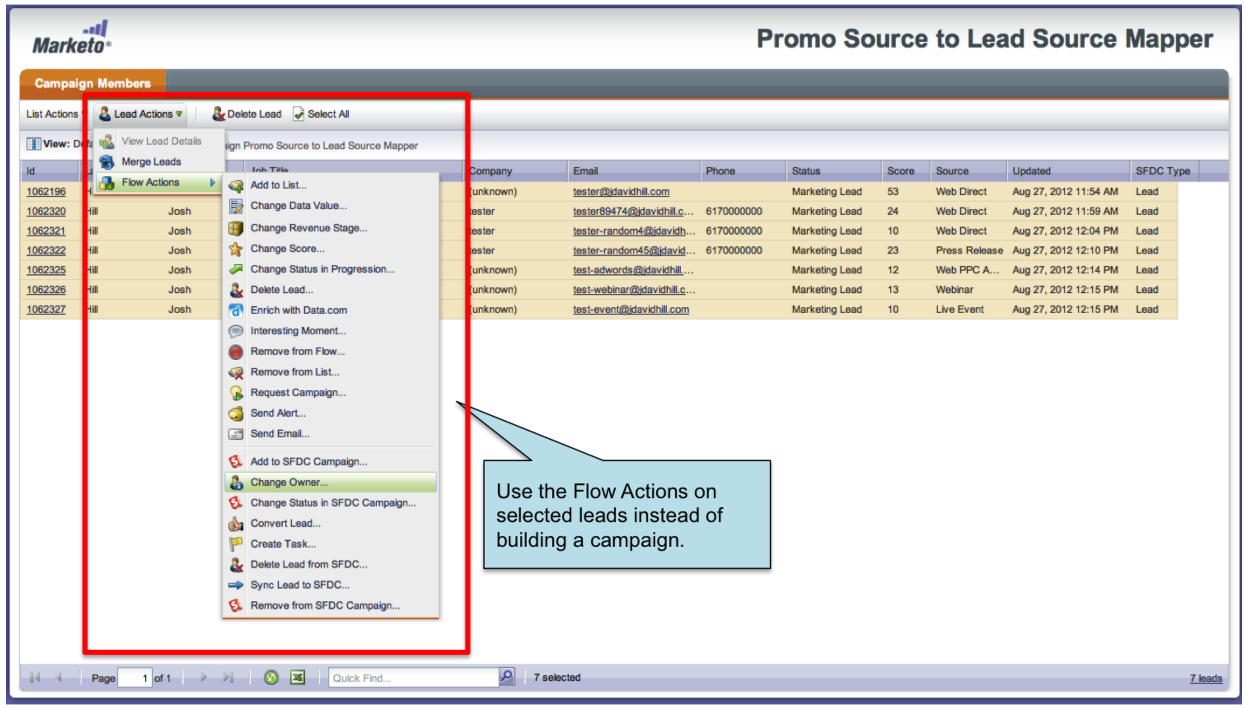
Use this to constrain a filter or Trigger to only look at Lead which did (or did not) do something at least X times. This can be useful when you want a Lead to fill out a form at least twice before triggering a new email series.

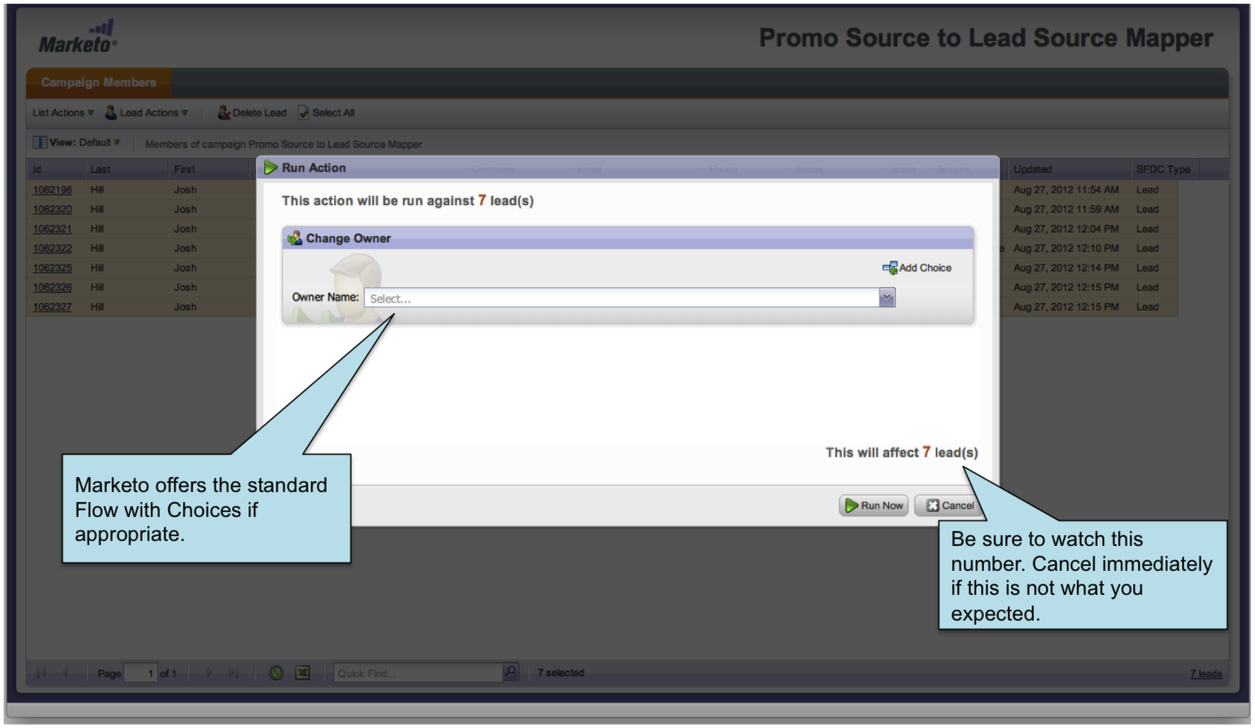
Opportunity Constraints

The Opportunity filters and triggers allow you to select among your own Salesforce Opportunity fields to select just the right group of leads who have Opportunities of at least $10,000 and a 50% Stage.

Flow Actions

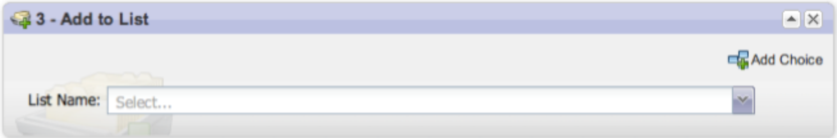
There are a [limited number of Flow actions](#), or things you can "do" to a Lead record. Some of these may be different if you are using Salesforce, SugarCRM, or Microsoft Dynamics. Here I will show you Salesforce Actions which may be similar for everyone.





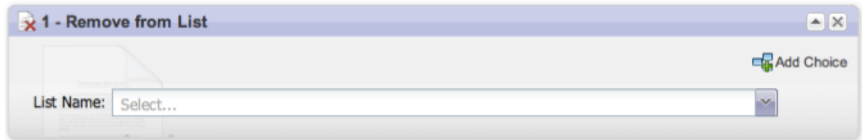
Add to List

[Adds the qualified leads](#) to the desired List. The list must already exist. You can add a Lead multiple times to the same list and it will not create duplicates.



Remove from List

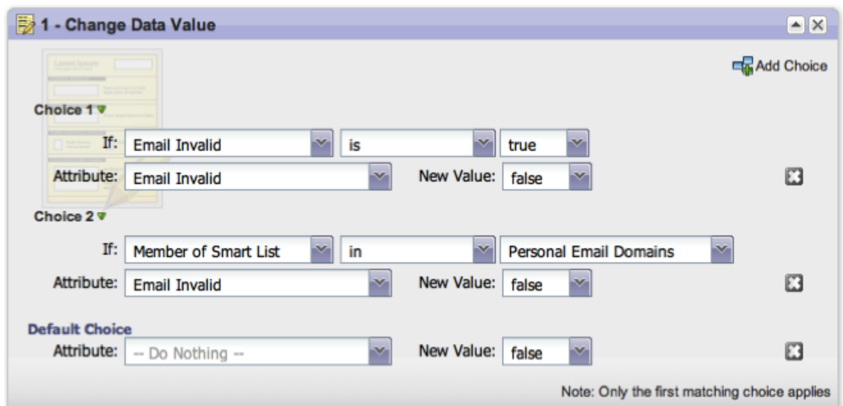
[Removes qualified leads](#) from the desired List. This action does nothing to the actual lead—it just removes the lead from being a member of the list.



Change Data Value

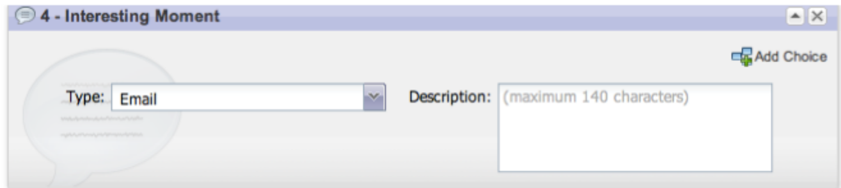
This is the most versatile action because it allows you to act on nearly any field, including your own custom fields. You can also insert any values you want (although not always advised).

For the qualified leads, `Change Data Value` of Field X to Value Y.



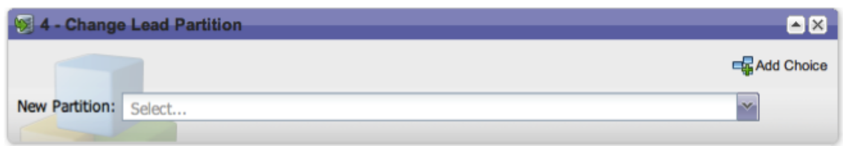
Interesting Moment

For the qualified leads, adds an `Interesting Moment` with the Type and details you enter. You can use special Interesting Moment tokens here as well as any text. Remember, an `Interesting Moment` will only be visible to Sales if you have Sales Insight installed. Try using `Create Task` or the automatic SFDC Sync Tasks if you do not use Sales Insight. Some firms use both. See this Idea for adding more Tokens to Interesting Moments.



Change Lead Partition

Only available to users with Workspace and Partitions. This action will move the lead over the fence to another Partition.



Change Revenue Stage

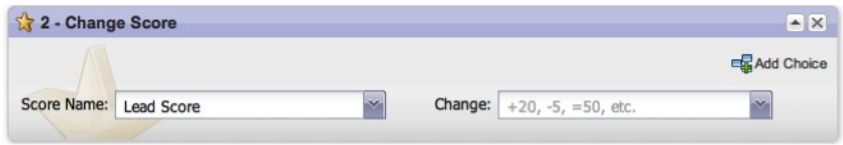
This is an Revenue Cycle Modeler action which is only useful if you have an active RCM. You can adjust any lead's Stage. Be careful as this will affect your RCM/RCA reports. It is best used on new or uploaded leads.

Change Score

Default is Lead Score, but will show other Score fields if you have them. Remember score changes can be entered as

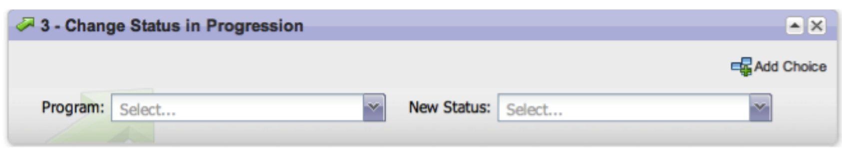
Value Entry	What Happens
5	Sets score to 5
=5	Sets score to 5
+5	Adds 5 to the current Score
-5	Deducts 5 from the current score.

You should always use `Change Score` for `Lead Score` fields. Do not use `Change Data Value`. See [Lead Scoring] for further information.



Change Status in Progression

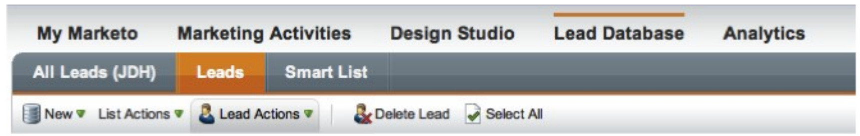
Typically used within a campaign that is part of a Program. You can use this action in *any* campaign, calling a specific Program and changing the `Progression Status` from outside that Program. You must use this explicitly in most situations or the Progression Status will not change.



Exceptions: Webinars will automatically set the `Attended` and `No Show` statuses after the webinar is completed. Roadshow Checked-in status can be changed via the [iPad Registration App.]

Delete Lead

Deletes from Marketo and CRM if you set this to True. Delete appears on the Lead View of the Lead Database or as a Flow action.



See Data Management for more information

Enrich with Data.com

To [Enrich a Lead with Data.com](), you can use this flow action. See my detailed guide: [How to Use Data.com with Marketo](). If you set `Enrich with Data.com = True`, Marketo will link with your Data.com account to update the qualified records. This action may overwrite existing data unless you use Field Blocking.

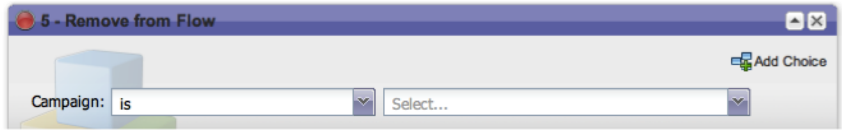
This flow action requires a valid Jigsaw.com user account. The flow will deduct 5 points for every update to a record which qualifies for this action.

[Details on Graveyard Leads]()

Remove from Flow

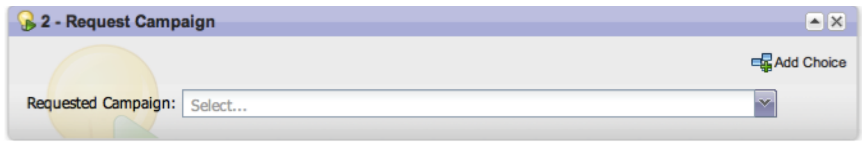
[Immediately removes a Lead from one or more Smart Campaigns]() where a Lead is in still processing. This is noted on the Campaign Summary as `Leads in Wait Step`.

`Remove from Flow` is often used as part of nurturing campaigns. You can use it in the `Lead Database`, `Member of Program`, or List Views to remove specific leads from existing campaigns.



Request Campaign

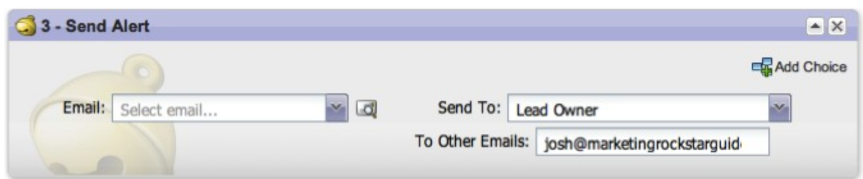
[Request Campaign](#) flow action calls a campaign to activate if the target Campaign is listening with a `Campaign Is Requested` Trigger. The Lead will only go through if it meets the Smart List criteria, which include how the campaign was Called. For instance, if a `Campaign Is Requested` trigger is listening for a `Sales Insight` action, but you call the Campaign from a `Marketo Flow Action`, this Campaign *will not activate.*



This flow action is often used in Data Management, API Calls, Sales Insight exposed campaigns, and Nurturing. This will ask the Requested Campaign to run on the selected leads. If a lead does not qualify for the requested campaign, nothing will happen to that lead.

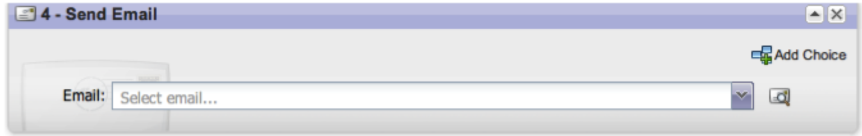
Send Alert

[Sends Sales an Alert](#) based on an Approved Email. Requires an email to use. You can also designate additional = email addresses using a comma between each email address.



Send Email

Sends the selected Email to the qualified Leads. Allows preview of the selected email. Send Email receives lower priority for processing, so it is often recommended as the first step in a flow for non nurturing campaigns.

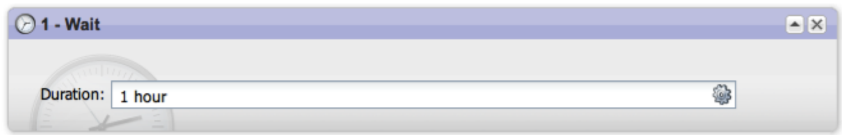


Wait

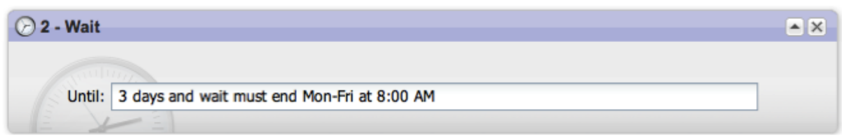
The Wait Step is one of the most useful and most misunderstood Flow Actions. We must review how it works. This flow action is not available on the Lead Database since it would not do anything.

All waits, times, dates are based on your System Time Zone!!

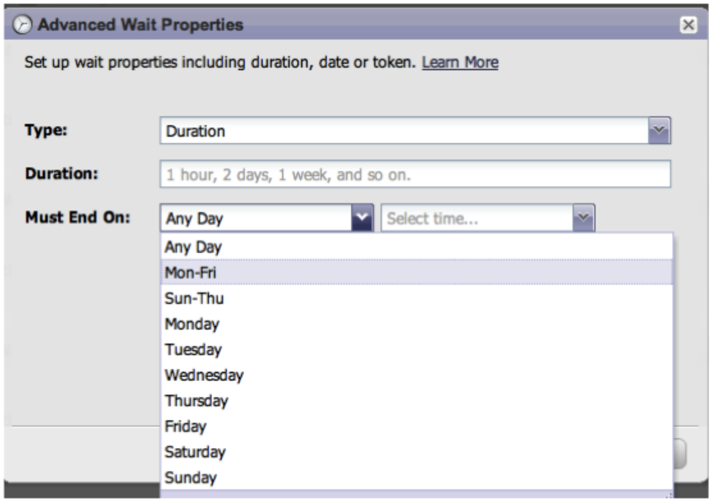
Standard Wait: this is the basic Wait where you just put in a time period. If we place in 1 hour, then Lead will wait here for 1 hour before moving to the next step. If you say 5 days, it waits 5 days.

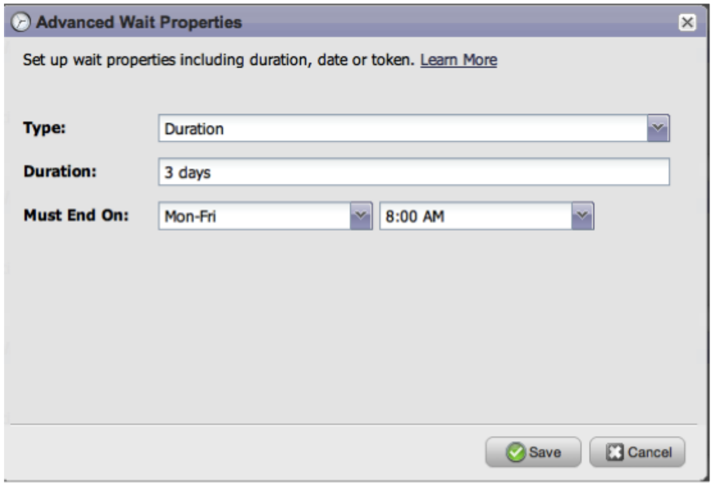


Duration: if you click on the gear icon, you will have new options. The standard Duration Wait now allows you to end the Wait at specific days or times. This is useful for ensuring emails go out on a weekday at 8:00 AM for instance.



`3 Days Must End On X at Y Time`. If the third day is up, it waits until the time entered. If that is not compatible with the `Must End On` choice, then it waits additional time until the condition is true. Thus, if you ask Marketo to wait `3 days Must End On Saturday at 10:00AM`, then it will keep the lead until Monday, but then see that the current day is not Saturday, so it will wait until the *next* Saturday at 10:00AM. This will also happen if you started on Friday at 10:05AM to `Wait 1 Day to Must End on Saturday at 10:00AM`, because Marketo will not allow the lead to leave until 10:05AM on the first Saturday

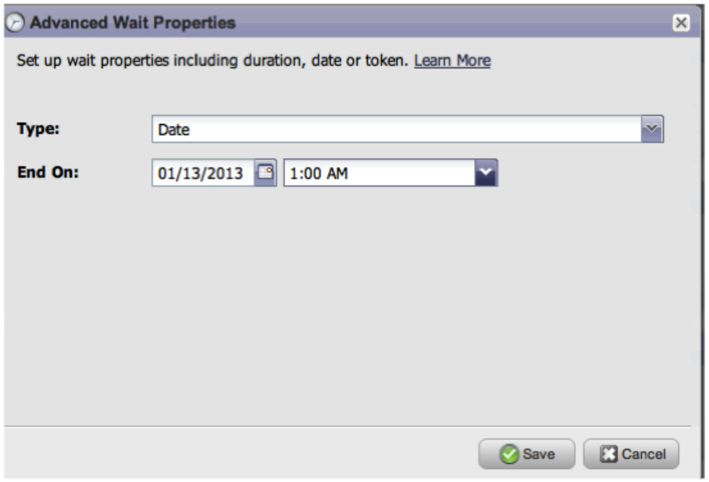




Warning: Leads cannot exit a Wait step unless you use Remove from Flow.

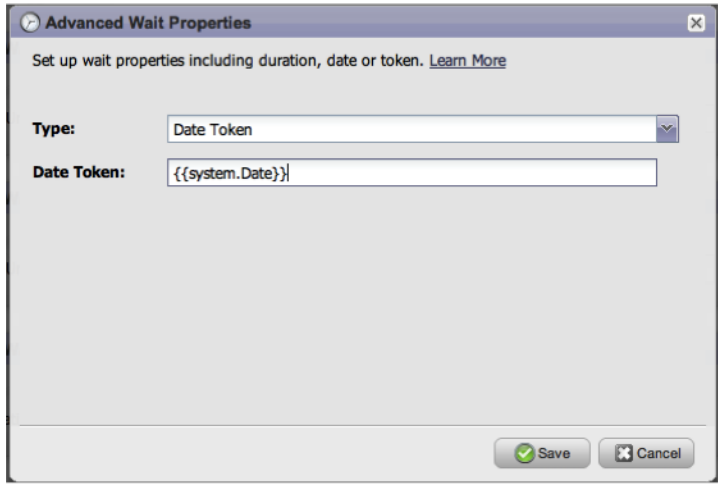
Leads inside a Wait step cannot be removed, even if you delete the campaign or wait step. Those leads will continue on to the next flow action (or exit) at the time the original wait step indicated. The only way to remove such Leads is to run a Remove from Flow action using a Smart Campaign or a Flow action against a Smart List in the Lead Database.

Date: waits until the chosen Date and Time, and then allows the Lead to continue to the next step.


Advanced Wait Properties
Set up wait properties including duration, date or token. Learn More
Type:
Date
End On:
01/13/2013
1:00 AM
Save
Cancel

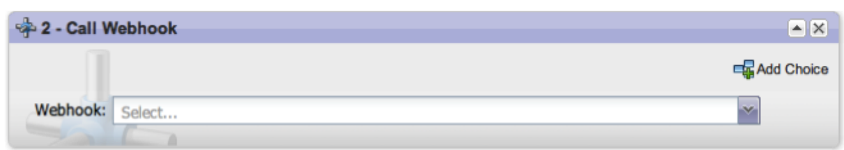

1 - Wait
Until:
Jan 13, 2013 1:00 AM

Date with Token: waits until a token inserted date. This is useful for Events or product launches. You must use a system time or a `My Token Date Token`. You cannot use a text token here. Date math is not allowed here either, however, you can add a second `Wait` step if you want it to base the time on {{my.Event Date}} + 3 days.



Call Webhook

Calls the requested [Webook] to push data to an external server. Use in place of the API. Webhooks must be activated under `Admin > Treasure Chest` for this to be active. See examples and use SMS and Twilio.

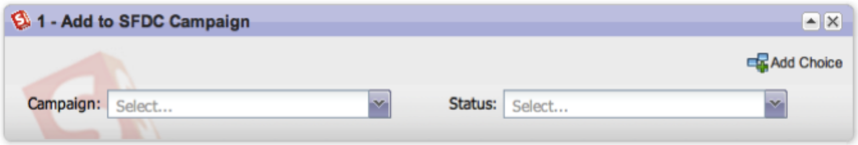


Salesforce Actions

All SFDC Actions have an implied Sync to SFDC. All SFDC Campaigns must have Active=True to be visible in Marketo.

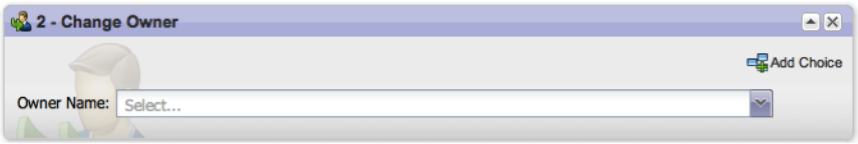
Add to SFDC Campaign

Adds the qualified leads to the chosen SFDC Campaign with a Member Status Value. I recommend creating the SFDC Campaign in SFDC before you run this action. Do not use this flow action inside a synced Program; it will be ignored or cause problems.



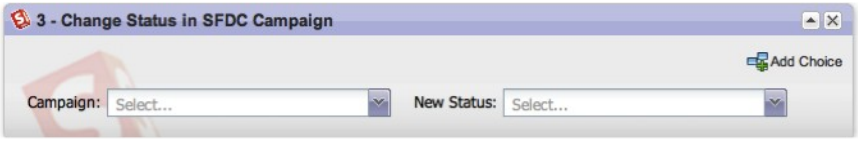
Change Owner

Changes the Lead Owner to the selected SFDC User or Queue. You can use Choice steps as well as `Round Robin` on this action.



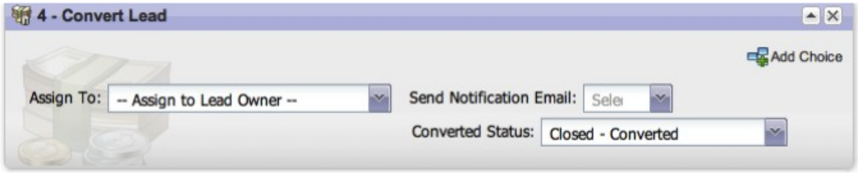
Change Status in SFDC Campaign

Changes the Member Status of qualified leads who are members of this SFDC Campaign. This action will also Add to SFDC Campaign with Member Status any qualified lead who is not already a member of the SFDC Campaign.



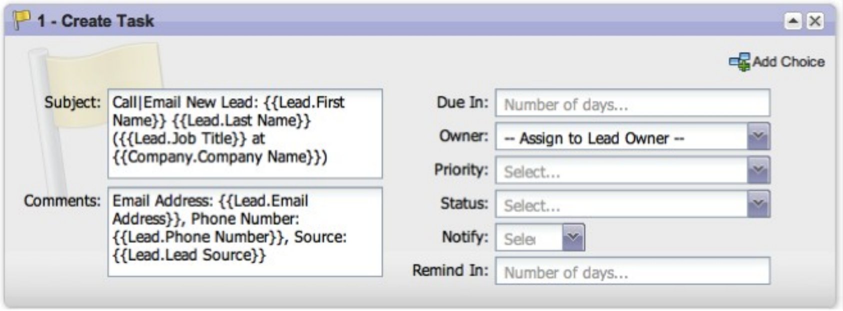
Convert Lead (to Contact)

Converts the qualified Lead to a Contact; creates a New Account based on the Company Name. This will also create an Opportunity in SFDC attached to the Contact. This is not recommended in most cases because it can create duplicate Accounts and unneeded Opportunities.



Create Task

Creates a Task on any lead which qualifies. If you set the Task to the future, it will appear under `Tasks`. If you set the Lead to be completed, the task will appear under `Activity History`. This is ideal if you are not using Sales Insight or if your team likes SFDC reminders like I do. You can use any support Token or My Token available to the campaign.

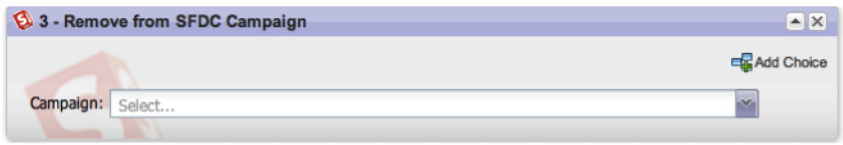


Delete Lead from Sales

For the qualified Leads, Marketo Deletes only from SFDC. Their `SFDC Is Deleted` flag is set to `True` and the lead is `Deleted in SFDC`. You have the option to set `Delete in Marketo = True` which will also entirely remove the Lead from *both* databases. Use this with caution; I describe how to use this action in Data Management.

Remove from SFDC Campaign

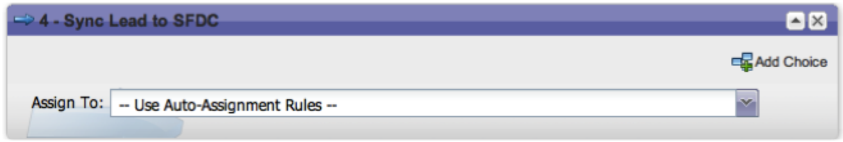
Removes the qualified leads from the selected SFDC Campaign. Used mostly to clean up erroneous data or test leads.



Sync Lead to SFDC

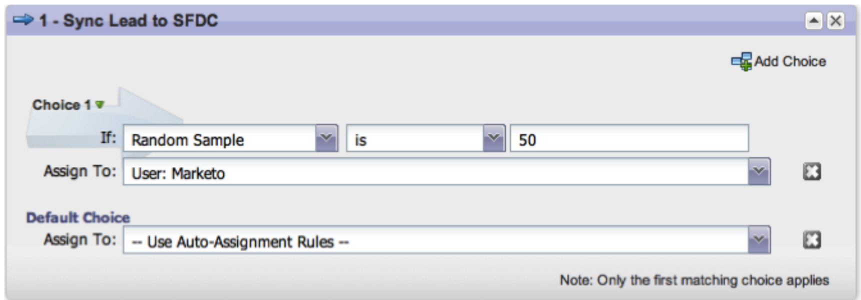
Sync Lead to SFDC is a critical tool to ensuring the Leads you want in SFDC (or your CRM) are completely updated when you want to assign an MQL to Sales, re-assign, or otherwise ensure the sync. This action is not necessary if your campaign is running with implied SFDC sync actions. You should run this action as the *last step* in most cases.

Your default choice is "`Use Auto-Assignment Rules`" which is highly recommended. This means keeping your SFDC Assignment Rules up to date. If a Lead is already assigned to an Owner, this flow action will not adjust the Lead Owner.



You can also use Choices to choose a `User` based on `Country`. For instance:

- If there is a reason to assign the Lead(s) to one person, use `Change Owner` instead.
- If you are using `Round Robin IDs`, you can also use them here in the Choice step. You can also use `Random Sample` instead of `Round Robin ID`.



Lead Database Flow Actions

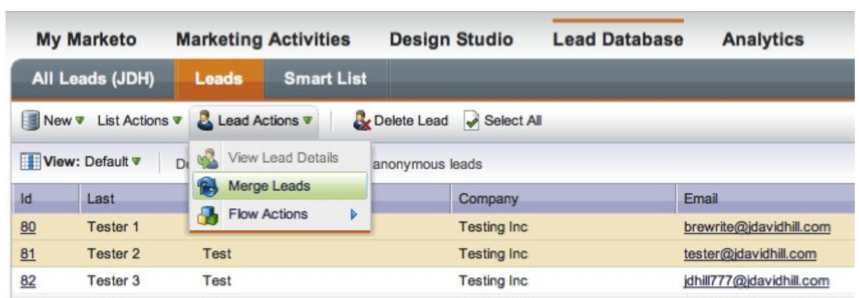
These are only available on Lead Database view.

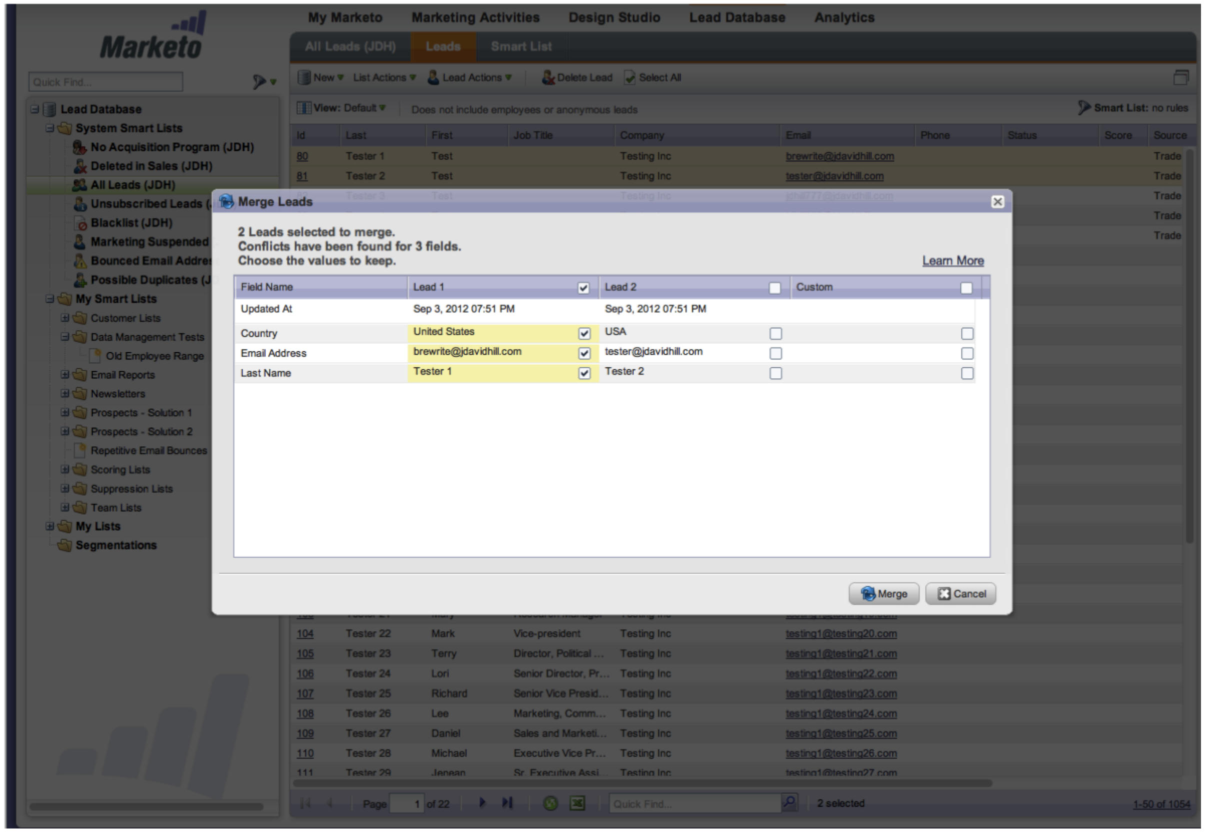
View Lead Details (also visible on any lead list view)

You can select a lead (turns Yellow) and double click. You can also click on the Lead ID wherever it appears to open the lead.

Merge Lead

You must select two or more leads to merge. Marketo will then show you this screen.





New Lead

You can create a new lead for any reason. I use this for quick test leads. If you leave out one SFDC required field, the lead will not sync to SFDC.

Other Reference Information

Marketo Email IP Numbers

You can use this current list of IPs to add to your own whitelist.

199.15.212.0/22
204.232.250.0/24
72.32.154.224/27
72.32.243.0/27
174.143.64.160/27
72.32.217.96/28
72.3.185.72/29
67.192.43.199/32
94.236.119.0/26

Domain Whitelist: *.mktomail.com

Secrets of Marketo

Login URLs

Your login URL can be any of Marketo's servers, not just `https://app.marketo.com`.

The URL `app-XX.marketo.com` similar to SFDC `na1.salesforce.com` and new `my.XXXX.salesforce.com.` Marketo also hosts EU servers on `eu-lonXX.marketo.com.`

Using the old `login.marketo.com` will bring you to `app.marketo.com`

Site Uptime and Deliverability Data

To see these, visit http://trust.marketo.com and also see monthly sender scores

Fast Case Creation

Note: Your main Admin must add you as an authorized Support requestor via the Community.

If you don't want to login to the Community or if it is down, then send an email to:

`support@marketo.com` from an authorized email address.

Maximum Number of Rows in a Filter Box:

You can have 2,499 rows in a select box. If you have more rows, say for a Global 10,000 smart list, then you need to have *four* Company Name filters using ANY (OR) as the Smart List setting.

Deactivating a Campaign

Does NOT Remove People from it. Eric Hollebone recommends deleting future steps. You could also run a sister campaign to `Remove from Flow` or add the `Remove From Flow` Step after the wait step.

The Send Email action has a lower priority in the system!

Recommended Resources

Marketo Documentation

Date Operators

Email Marketing Glossary

Filters and Trigger Operators

Flow Action Reference on Marketo

Icon Glossary

Implied Salesforce Actions

Landing Page Glossary

Lead Scoring Glossary

Marketo Email IP Whitelist

Marketo Glossary of System Terms

[Multiple Triggers in a Smart Campaign]

[Opportunity Filters and Triggers Glossary]

[Program and Event Glossary]

[Smart List Advanced Logic]

[Smart Lists Explanation]

[Trigger Glossary and Reference]

[Using the Reason Constraint]

Marketo Community Marketo

[Filter and Trigger Documentation] - Idea

Experts

[Lead Generation Glossary of Terms] [Sales Lead Insights]

Appendix III: Extras

At a Glance

Overview

There is a ton to know about using Marketo. Not everyone will use everything, in fact, I haven't used more than 70% of the system. And because of time constraints, there was so much more I wanted to share with you. So I wil curate the best links to help answer all the critical questions you might still have as you become more experienced with the system.

How to Build Nurturing Systems Resources

Modular Drip Campaign via Robbie Mitchell: marketo@robbiemitchell.com

Discussion on Tools

Recommended Tools for constructing nurturing flows:

- Paper Pad and pencil
- Whiteboard
- Visio
- Omnigraffie (Mac)
- LucidChart
- Gliffy.com

Optimizing Lead Nurturing - HubSpot

Discussion on nurture field use

Discussion on tying data to nurture

Advanced Nurturing Deep Dive – Summit 2012

Eric Hollebone

Import Pre-built Programs from Marketo

Landing Page Resources

Creating a New Template

Webinar Landing Page Template Example from Veeam

Editing a Template

Good Design – Which Test Won

CTA Design Examples

Web Page Filters and Triggers

Embedding Forms and Pages with API

Landing Pages and SEO Issues - Also be sure to use the Title, Keyword, and Description tags using Tokens or hard coded into your page.

Tracking Banner Pages

Landing Page Tracking

Using Video in Marketo

Marketo now has a helpful Youtube feature, however, you may find some of these resources helpful for tracking purposes.

Video conversion help

Tracking Video Views

Why You Should Use Video - Resources

Optimizing Video for B2B – HubSpot or More on Using Video.

David Meerman Scott on Video

Embedding a Flash Video on a Marketo Page or this discussion.

YouTube on a Page

Eric's Program Web Events – How to Track Video Views and this discussion.

Do not host videos on Marketo servers!

Using Vimeo and Editing WebEx Recordings

Tracking YouTube

Video Program Example

Publish YouTube Videos with Social Sharing

Tracking ideas could include triggering an Interesting Moment, Task, Alert, or Progression Change.

Form Resources

Marketo Forms offer a wealth of choices to those who know how to tweak them inside Marketo and with jQuery and Javascript.

The Marketo Form Instructions Master List

Appending Data to a URL to bypass a form (not recommended)

URL Parameters on Thank You Pages

Marketo Forms on Non Marketo Pages without iFrames

More code for blocking personal email domains

Marketo Summit 2012 Materials

Predictive Scoring

PPC Optimization

How to Get Started with RCA

Extending Marketo with API Integrations

Engagement with Dynamic Content and PURLs

Using Video

Funnelnomics: Scaling with GTM

Marketo Success Tips

Measuring Effectiveness of Programs

AB Testing with the Stars

Advanced Nurturing Deep Dive (best of 2012!)

A Global Rollout Strategy

Accelerating Revenue from Customers

Revenue Attribution

Sales Cycle Optimization with Content, SEO, and Social

RPM Benchmarking

SFDC Integration Best Practices

Killer Deliverability – Autumn Tyr-Salvia

Using the SOAP API

Programs

Programs are discrete, end to end Marketing Programs, that contain all the pieces for a complete event or system. They are better organizational units than folders and campaigns and they also drive better data. They are required for Roadshow (iPad) and Webinar integrations.

The Program Library Tool

Preventing Leads from Becoming Program Members

Short Glossary

Event

A marketing program that is an offline or online event. There are several types:

- Webinars: works with third party tools.
- Tradeshows: just dependent on progressions
- Roadshows: must use for iPad App to work

Event Partner

Third party adapter for services like WebEx, GoToWebinar, or ON24.

Event Schedule

Details imported from the Event Partner or set in the Program. Roadshow data will only appear in the iPad app 7 days before the Scheduled time.

Child Campaign

Campaign within a Program

Progressions or Progression Statuses

A status given to a lead as it moves through the Program. These are defined in `Admin > Tags > Channel` and can be customized for each type. A Progression might start as Invited then move to Registered and Attended. Progressions are critical to using Programs successfully and for RCA. Progression Changes must be programmed into each Program, based on your definitions.

Success Actions

Defined in the Channel as a Status = Success. This is your goal. You can have multiple success Progressions in a Program.

Channel

Type of Program, determines the Progressions available.

Tags

Way of segmenting Program data. You can customize these in `Admin > Tags` and they help categorize data within RCA.

Period Cost or Period Month

The cost in each month. You must define this as zero if you have multiple months and some months without a cost. Otherwise RCA will not work correctly.

Acquisition Program

Program responsible for acquiring the Lead; or the Program where the Lead was created for the first time.

Acquisition Date

Date when the Lead became a Known Lead within a Program.

Members

Leads who participated in a Program.

Local Assets

Landing Pages, Forms, or Emails within a Program.

My Tokens

Tokens you can create that are specific to this Program. Tokens can be used at the Program or Campaign Folder level for use in all child campaigns or Programs. These are useful in building Program Templates.

Program Template

A Program you define as a template and can clone repeatedly for marketing programs you use frequently, such as a Webinar or Live Event.

Revenue Cycle Modeler, Explorer, and Analytics

RCA Webinar 2013:

MLM Tutorial - Read

Archived Campaigns and Programs ok in RCA

Enabling Custom Fields in Revenue Cycle Explorer

Opportunity Analyzer

Understanding RCE Analysis

Learning RCA

Short Glossary

Attribution

Tracks Program Influence on 2 metrics: Opportunity Creation (touches before Opp Creation) and Opportunity Close (revenue) that tracks all touches before Opp Close.

Touch

Acquired date or Success Status reached in a Program.

Acquisition Attribution: first touch

- Allocates the value, with cost, to the program that acquires the Lead.
- A lead can only be acquired by one Program.
- Acquisition Program can be changed with Change Data Value.

Success Attribution

Allocates value with cost, across ALL Programs in which the Lead reached the Success Progression.

Attribution Qualifications

The Touch Date must be on or before the Opportunity Created or Closed date. Opportunity Units are calculated by `(Number of Programs / Number of Leads attached to the Opportunity)` such that each Program receives an equal division of the Opportunity Revenue

Campaign Analysis

Which campaigns touched the most unique leads? Of those, how many converted to an Opp?

Lead Analysis

How many leads were created over time? How many converted and how long did it take?

RCM Performance

How are leads flowing through the funnel?

Opportunity Analysis

How many opps have I closed Y/Y and which channels? Which channels are closing faster?

Program Cost Analysis

What is the effectiveness of each Program Channel over time? What is the cost per success or per new name? How much did I spend per channel each month?

Program Membership Analysis

How many leads from a program reached success? How many new names did I acquire?

Program Opportunity Analysis

What is the ROI on my Programs? Which opps were influence by a given Program?

Program Revenue Stage Analysis

How many leads acquired by a Program reached a stage in RCM?

Importing Leads

Import a List

Importing Lead Best Practices

Avoiding Errors on Import

Ignored and Blocked Fields on Import

Importing Leads is a critical part of using Marketo successfully. Here are a few tips in lieu of an entire tutorial.

- Only import columns (fields) that you definitely need or want.
- Set field blocking for key fields like Lead Status, Email, etc…so that existing leads' data is not overwritten unless you want it to.
- Always setup a Static List before you import.
- You do not have to choose an Acquisition Program, just set that to None.
- You can export a list, change its data, then re-import to mass update certain fields.
- Export 1 Lead with All Columns and then setup a template for your team that everyone uses for the most common fields for import.
- Restrict Import Rights to certain Roles and Users so that only the best trained team members can bring in new data. Trust me, I've seen some horrific data overwrites.
- Always import via Marketo to dedupe leads by Email Address or you risk creating all sorts of dupes.

PPC and Marketo

Google and Ad Retargeting

QueryStrings

Replacing SFGA

Google Analytics Code on Emails

Conversion Tracking

Keyword search parse

Collect Details on Lead Source

Tracking with utm codes

Marketo and Adwords Overview

Key to Google Adwords and Marketo (2009 webinar)

Adwords and Marketo FAQ

PPC Campaign Performance – Obility Consulting 2012

PPC Optimization - 2012 Summit

Running Webinars

Discussion on how to sign up for Multiple Webinars

Invitation & Procedure Layout Tips – Spear Marketing

Avoid Mistakes in Your Next Webinar – Spear Marketing

More Webinar Tips – Spear Marketing

Science of Webinars – HubSpot or [Slideshare]

GoToWebinar Solutions

WebEx Updating Frequency

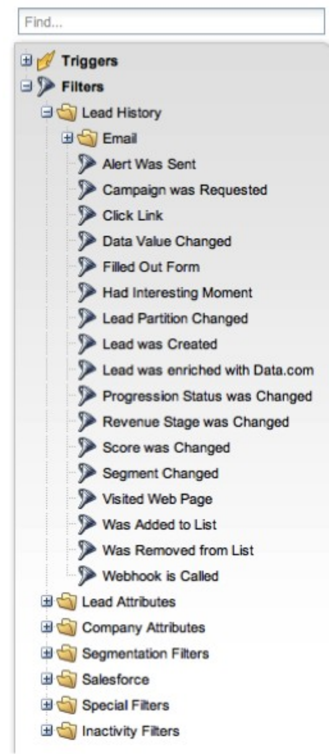
Spark Webinars

Marketo Webinar Adapters Setup

ICS File Insertion

Note: native ICS support is coming on March 8, 2013!

[Elliott's Add to Calendar Link](#) – from Elliott Lowe. Use this code and tokens to generate the correct link for an Add to Calendar via Marketo emails. Also see [this discussion](#). This only works for GoToWebinar.




```
https://[unique-subdomain].gotomeeting.com/synchOutlook?wid={{my.Event Number}}&uid={{member.registration code}}
```

GoToWebinar automatically creates ICS files for their events, and you can leverage these using tokens.

GTW's format for a file is:

```
https://www1.gotomeeting.com/synchOutlook?wid=123456789&uid=9876543
```

To use this with tokens, create a My Token for the Webinar ID (you can get the ID from GTW or the Setup screen of the program). The other token you need is created by the integration already: `{{member.registration code}}`. Keep in mind this URL **must be given after someone has registered** for the webinar and the integration has to fire correctly.

The dynamic ICS URL is (I encoded the ampersand, you can leave it and Marketo will do it automatically):

```
http://www1.gotomeeting.com/synchOutlook?wid={{my.Webinar ID:default=edit me}}&amp;uid={{member.registration code:default=edit me}}
```

[Create an ICS File and Upload it to Marketo](#) – will not create a unique ID! You may need to turn on tracking on the link using [mktNoTrack](#)

[ReadyTalk Webinar and ICS files](#)

To Create an ICS someone can use from a confirmation page or email:

Step 1: Open ical or outlook

Step 2: Create event with location info, etc.

Step 3: ical: drag to desktop outlook: Save As

Step 4: Name file "yyyy-mm-dd-event-name.ics"

Step 5: Upload to an ICS folder on Images/Files

Step 6: Copy link

Step 7: Insert link in appropriate spots on your site, emails, pages.

Running Live Events

Using Marketo Events

Program and Event Glossary

Handling Many Events

Using programs

Kiosk Sign Up Page -take off tracking to avoid issues.

Running Events

About Event Channels in Marketo

Event Promotion Outline from Marketo

Definitive Guide to Event Marketing

Segmentations

Segmentations Tutorial

Reporting with Segmentations

Sharing in Workspaces - It is better to install segmentation on the default workspace or it won't work.

Errors with Segmentations

Using Segmentations In Smart Lists

Using Dynamic Content

PURLs

Create and Use PURLs

Dynamic Emails and Pages

Dynamic Landing Pages

Using with an Email

Dynamic Content

Add Dynamic Content to Emails

Snippets

Snippet Tutorial - Snippets are best for footers, intro text, or content that does not change often.

Static Snippets are the default, to make them dynamic, say to add footer detail for Americas, EMEA, Asia, then Start with Default:

- If you modify a segment's content block, it is no longer tied to updates of the Default.
- You must approve the snippet just like an email or LP.

Snippets and Salutations in Foreign Languages

Handling Data

Bad Data

Removing Garbage Leads

Competitor Handling Ideas

Blocking personal domains at the form level

Workspaces & Partitions

Workspaces and Lead Partitions Tutorial

About Workspaces and Partitions

Workspace Management

Lead capture forms and multiple workspaces

Partner Owned Leads and Workspaces

Teams and Workspaces

Lead Scoring and Partitions

Sample Partitions

SOAP API Details

Multiple Systems

Object Model

[Triggers and Filters on Custom Objects]

[SOAP API Overview]

[SOAP API Instructions]

[Configure SOAP API]

[Request Campaign Sample]

[Request Campaign API Code]

[WSDL 2012]

[Java Implementation]

[PHP Client]

[User registration example]

[Marketo SOAP C#]

[Debugging API]

[API Get Leads]

[Daily Salesforce API Call Limit]

[SFDC API Call Limit Exceeded]

[Getting Around API Call Limits]

Social Tools

[Social Login Data Issues]

[Social Sharing Tutorial]

[Social Tool - New]

Publish to Facebook

Short URLs in Marketo – workaround (or just use bit.ly)

Marketo Glossary

Trigger Overview

Opp Triggers

Lead Terms

Marketo Glossary of System Terms

Email Marketing Glossary

Landing Page Glossary

Icon Glossary

Lead Scoring Glossary

Program and Event Glossary

Origin Fields

Other Helpful Hints

Treasure Chest: Campaign Inspector – see all of your campaigns in one place.

Campaign Queue – check on currently scheduled flows.

Why is My Campaign Slow? – The Campaign Queue

How to Setup an Autoresponder

Epilogue

The End

You've reached the end my friend.

Fonts

This guide was typeset in Times, Calibri, Courier, and Geneva. Hey, Calibri does have its uses.

Upcoming Projects

Josh Hill will return with

- An Expansion Pack? DLC?
- GoldenRuleNow.com

Talk to Me

Have a question? A correction? Free Frappuccino®? I want to listen.

Corrections	corrections@marketingrockstarguides.com
Content Questions or Suggestions	marketo.guide@marketingrockstarguides.com
Billing or other questions	support@marketingrockstarguides.com

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Marketing Rockstar's Guide to Marketo

Josh Hill