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How to Integrate Marketo

# LIKE A PRO

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*Best practice techniques to make your marketing data shine.*

The Marketo logo is centered within a large, dark blue circular graphic. This graphic is part of a larger network of smaller circles, each containing a white icon representing various marketing and technology concepts such as a lightbulb, a globe, a smartphone, a gear, a mail envelope, a keyboard, a bar chart, a hand cursor, a battery, a Twitter bird, a speech bubble, a person with a plus sign, a wrench and hammer, and a computer monitor. The background is a solid dark blue.

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# INTEGRATION BIG PICTURE:

## Why Integrate Marketo?

*If you have the task of integrating a piece of software like Marketo, then this guide is for you. Integrations, you'll quickly find, aren't exactly simple; but they don't have to be impossibly complex either.*

Many integration products out there will enable you to configure a powerful Marketo integration and an affordable price. It is important though to make sure that you take the time to understand how they work. Integrations are also critical to any business that wants to take advantage of the automation that data driven integrations provide.

Marketo integrations should take into account the role that Marketo is meant to play as a marketing system. Marketing systems tend to sit "in the middle" of other systems in a typical corporate cloud system hierarchy. Marketing systems can be integrated with other marketing applications such as event ticketing systems like Eventbrite and Cvent, webinar systems like Webex and GoToWebinar and even website form applications like Wordpress and Wufoo.

In a typical integration, these apps would feed lead data into Marketo, Marketo would then be integrated with a CRM or ERP to feed leads to sales and fulfillment, as well as receive data back from sales to update lists and dynamically inform your marketing campaigns. This "multi-directional" integration setup will enable you to achieve true marketing automation across your whole company.

*Sounds great, right? Read on!*



# INTEGRATION FEATURES:

## Multi-Directional Integrations and Data Updating

*When considering integration products, there are a few features that should be considered, so make sure that you ask your integration provider about these:*

### **Multi-Directional Integrations:**

Multi-Directional means that ability to add multiple systems to your integration, rather than just 2 systems or “point to point” syncing, which you’ll find in a lot of basic integrations. Multi-directional integrations enable you to integrate any system you’re using or may implement, rather than just Marketo and another system, such as your CRM, finance or support system.

Having this flexibility will benefit everyone on your team and enable data synergy across your entire company. To that end, make sure that other groups at your company are aware and have input into your integration choices!



### **Data Updating:**

Data updating is the ability for you to have your integration not only create new records in Marketo and other systems you’re integrating, but also provide updates to the data in either system as data changes. This is an especially critical feature when discussing Marketo, as updates to lead records in other systems should automatically change your lead data in Marketo via a continuous sync. Changing lead data will also then change your Marketo dynamic lists that Marketo leads are organized into.

This could then trigger a campaign automatically, enabling marketing automation on data that is being driven from your sales team or other groups in your company.

# MARKETO DATA TYPES

Before we can get into the business of integrating Marketo as a system, let's first understand what data Marketo has and allows you to integrate via their **APIs**.



## Leads

Leads represent real sales leads that have been generated or purchased. Leads and the data associated with them are gathered into your Marketo Leads database, and then organized as you see fit. Lead data is kept in fields: standard and custom, which you can manipulate and will hold the data about each of your leads. You can then use this field data to produce lists, segmentation and run marketing campaigns.



## Lead Activities

Lead Activities in Marketo are activities associated to leads and appended to their records in fields. These activities can be email clicks, website visits, website link clicks, form submissions, and more. Marketo also allows for any custom fields to be created in the Leads Database, which you can then use on your forms or to create smart lists and segments for your marketing activities. Some integration platforms like Bedrock Data will rollup some of these activity fields for you and allow you to sync the rolled up fields to other systems, which is an added benefit!



## Smart Lists

Smart Lists are how leads in Marketo are organized for your marketing campaigns. Smart lists in Marketo keep themselves up to date automatically as data on a lead changes. This is extremely powerful with regards to any integration, because it means that as data changes in any system that is pushing data to Marketo, your smart lists will be automatically stay up to date.

## TOP FUNNEL INTEGRATION ENDPOINTS:

### Marketing Apps, Forms

The Eventbrite logo is displayed in white text on an orange rounded rectangular background.

“**Top funnel**” integrations sync data from other marketing or support applications into Marketo and are typically one-way in “pushing” data into Marketo. It usually doesn’t make sense for these systems to have data synced back from Marketo, though in some cases (landing pages > webinar apps) it does make sense. Example apps of this kind include webinar applications like GoToWebinar and Webex; event ticketing applications like Eventbrite and Cvent; and form applications like Wufoo or plugins that you might find in Wordpress.

## BOTTOM FUNNEL INTEGRATIONS:

### Sales (CRM), ERP and Finance

**Bottom-funnel integrations** with Marketo most commonly work against sales systems (CRMs), but can also integrate with ERP systems like NetSuite, SAP and Acumatica. These integrations are a bit more robust than their top of the funnel counterparts, as they tend to be bi-directional in nature: syncing data from Marketo to these sales and logistics systems, and then back again to Marketo as data changes.

Leads and lead activities should be setup to sync (this is typically done with a field mapping) from Marketo into these systems. As leads are created (by submitting forms on your website or landing pages) in Marketo, they automatically sync to your CRM or ERP system as an appropriate record type. Updates to these lead records (including analytics) in Marketo should also sync in the future, updating the CRM/ERP.

To achieve true marketing automation through Marketo, you should create a data environment where you can sync many different data points from all groups into Marketo to use for your marketing efforts. You can use all of this data to create smart lists that will trigger smart campaigns in Marketo automatically, creating powerful marketing automation campaigns.

CRM and ERP integrations should force you to think about the data objects that you can integrate: this should inform your decision as to which integration platform to use.

#### FOR INSTANCE:

You may have data on a particular object (like account or opportunities in the CRM) that you need to use in Marketo to segment leads and drive marketing campaigns. Make sure that the integration you choose allows you to get the data that you need into Marketo.

# INTEGRATION STRATEGIES:

## How to Integrate Marketo

*There are many ways that you can integrate Marketo, and we are here to tell you how, based on your needs:*



### Manual Integrations

Nobody likes manual integrations, least of all the entry level employee or intern you've hired to do data entry and loading for you. Manual integrations are manual exports and imports, typically using Excel and require level of data manipulation in the middle. These types of integrations are time consuming, expensive and frustrating ... BUT may suffice for you if you only need to load data at very infrequent time intervals and have staff that is willing to bite the bullet on these data loads.

#### Pros:

- Effective (if you get the data right)



#### Cons:

- Expensive
- Manual (not automated)
- Error prone



### One-Way Integrations

One-way integration platforms have risen into popularity with the development of apps like "If this, then that" and other apps that are similar to this service. These services can be useful to you (if you can find one that works with Marketo) for simple integration points where you don't require updating of your data consistently (which these services don't tend to do).

#### Pros:

- Affordable
- Easy to setup



#### Cons:

- Hard to maintain
- No updating of data
- 1:1 integrations only (no multi-directional)



# INTEGRATION STRATEGIES:

Continued...



## Native Integrations

Native integrations are those that are written and maintained in house, by Marketo. Marketo offers a few different native integrations at the time of this writing, including CRMs: Salesforce.com, Microsoft Dynamics CRM and SAP. There are also services that you configure to enable webinar integrations with Webex, GoToWebinar and few other webinar platform products. Native integrations are great for the most part, but oftentimes don't allow for a lot of flexibility. Marketo does an excellent job with their Salesforce.com integration, so if you're using Salesforce.com, you're in good shape. Other CRM and ERP integrations may require more customization, which is why you may want to consider a third party.

### Pros:

- Affordable
- Data updating supported (in most cases)
- Easy to Setup



### Cons:

- Inflexible
- Inconsistent Support
- 1:1 integrations only
- Limited future development



## Integration Platforms

[Bedrock Data](#): Third party data-driven integrations with Marketo like what Bedrock Data provides enable the best of both worlds, giving you powerful, multi-directional integrations that are flexible, easy to maintain and are affordable. In terms of flexibility, third party integrations feature the ability to connect to the most amount of system objects in Marketo and otherwise and can provide multi-directional "all in one" integration solutions to Marketo users.

### Pros:

- Flexible
- Multi-Directional
- Data updating supported
- Easy maintenance



### Cons:

- Slightly more expensive than a native integration

