



How To Get Marketo Data Into New Relic Insights

ISAAC WYATT

MARKETING

2014.06.13

 @ISAACWYATT

What You'll Need

NEW RELIC INSIGHTS

**Active New Relic Insights
Account
Admin Permissions**

Optional Material Review:

- Getting Started Guide: https://try.newrelic.com/rs/newrelic/images/InsightsGA_GettingStartedGuide_FINAL.pdf
- Inserting Events into Insights: <https://docs.newrelic.com/docs/insights/new-relic-insights/adding-querying-data/inserting-custom-events>

MARKETO

**Active Marketo Instance
Create Webhook Permissions**

Optional Material Review:

- Setting up Marketo Webhooks: <http://developers.marketo.com/documentation/webhooks/>
- Setting up a test email campaign: <https://community.marketo.com/MarketoArticle?id=kA050000000L7bfCAC>

Process Outline

1 SET UP INSIGHTS

a. GET API KEY & ENDPOINT URL

2 SET UP MARKETO

A. SET UP WEBHOOK

B. SET UP SMART CAMPAIGN

3 SEND TEST

4 QUERY INSIGHTS WITH NRQL

5 BUILD A DASHBOARD

1

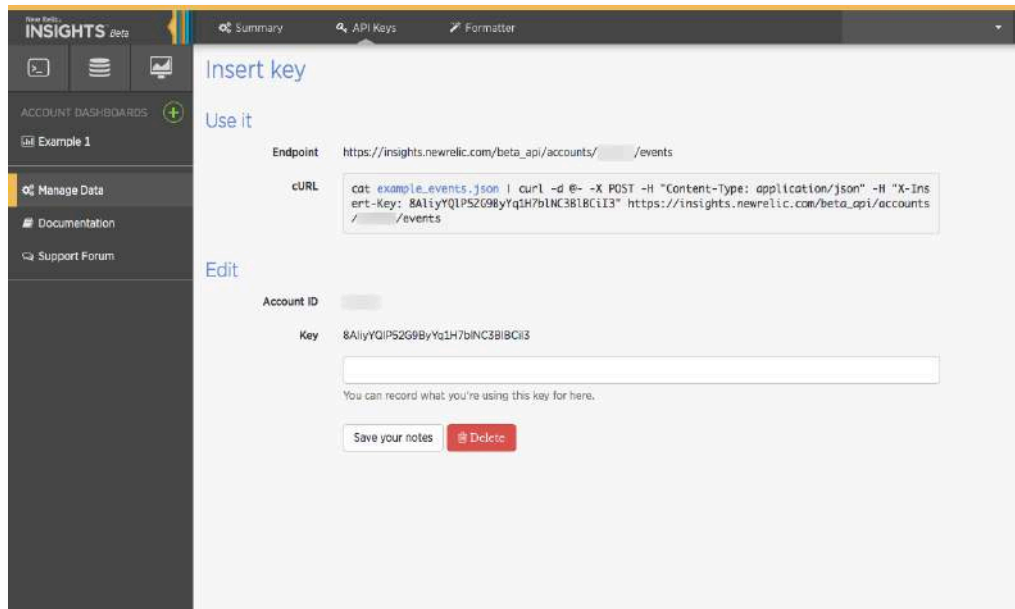
New Relic Insights | Register an API Key

The API Key allows you to insert events into Insights.

You can have multiple event types submitted under a single API Key.

To add an API Key:

1. From the Insights menu bar, select Manage Data > API Keys.
2. From API key management, select the plus sign next to Insert Keys heading.
3. Select the plus sign next to Insert Keys heading.
4. Enter a short description for the key.
5. Select Save your notes.



You will need the “Endpoint” and the “Key” displayed on your webpage like in the above screenshot

2

Marketo | Set up the Webhooks

Create a new Webhook titled “Insights: Email Send”

- Set the *URL* field to the *ENDPOINT* address that you found in the previous step
- Leave the *Request Type* as “POST”
- Set *Request Token Encoding* and *Response Type* as **JSON**
- Set the *Template* as shown and save

```
{  
  "eventType": "Email",  
  "eventDetail": "",  
  "eventAction": "Send",  
  "eventInfo": {{SP_Send_Alert_Info:default=null}},  
  "EmailProgram": {{trigger.Name}},  
  "EmailSubject": {{trigger.Subject}},  
  "EmailAddress": {{lead.Email Address:default=null}},  
  "SFDC_Id": {{lead.SFDC Id}},  
  "MktoEventDateTime": {{system.dateTime}},  
  "CampaignName": {{campaign.name}},  
  "CampaignId": {{campaign.id}},  
}
```

Edit Webhook

Webhook Name: * Insights Email Send

Description: Push Email Send Event to New Relic Insights

URL: * Insert Token
https://insights.newrelic.com/beta_api/accounts/1/events

Request Type: * POST

Template: Insert Token
{
 "eventType": "Email",
 "eventDetail": "",
 "eventAction": "Send",
 "eventInfo": {{SP_Send_Alert_Info:default=null}},
 "EmailProgram": {{trigger.Name}},
 "EmailSubject": {{trigger.Subject}},
 "EmailAddress": {{lead.Email Address:default=null}},
 "SFDC_Id": {{lead.SFDC Id}},
 "MktoEventDateTime": {{system.dateTime}},
 "CampaignName": {{campaign.name}},
 "CampaignId": {{campaign.id}},
}

Request Token Encoding: JSON

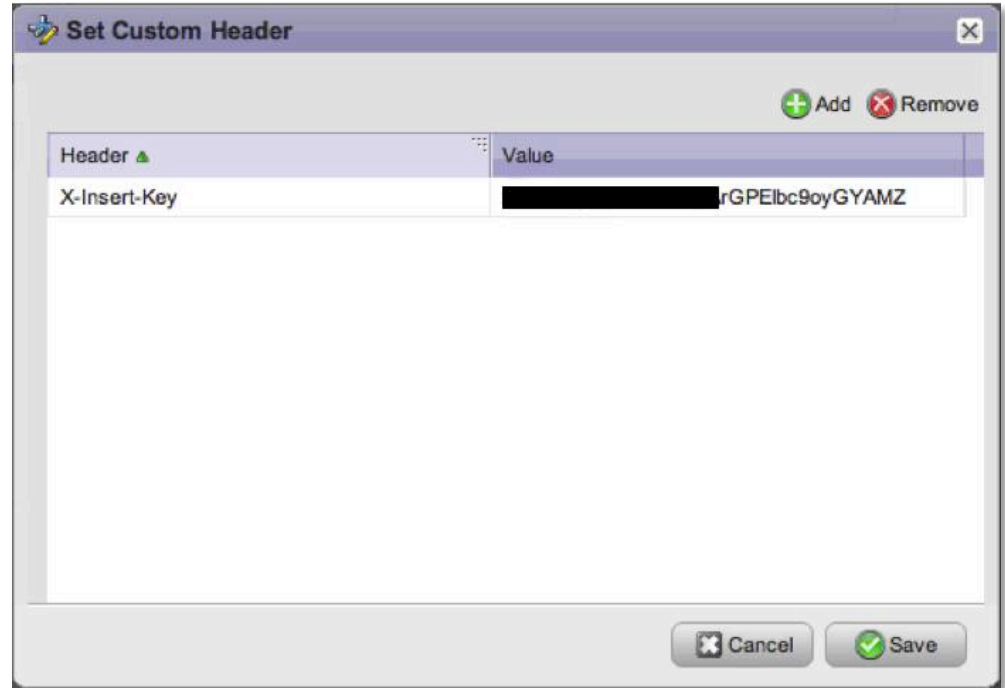
Response type: JSON

Cancel Save

Marketo | Set up the Webhooks

Set Custom Header:

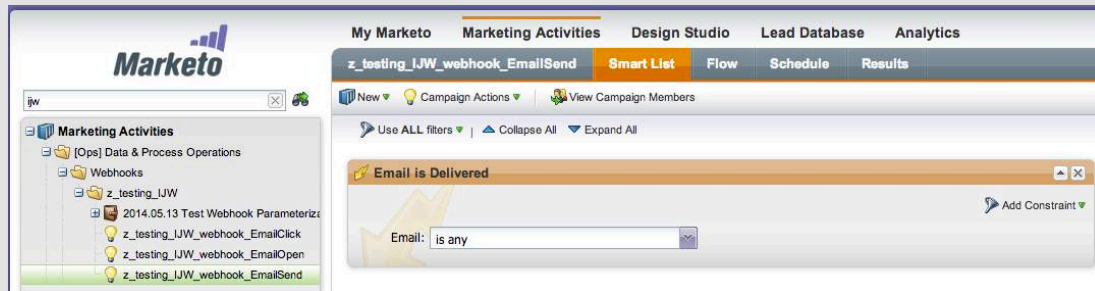
- For the “Header” put **”X-Insert-Key”**
- For the “Value” put the Key you received from the New Relic Insights app



Marketo | Set up the Smart Campaign

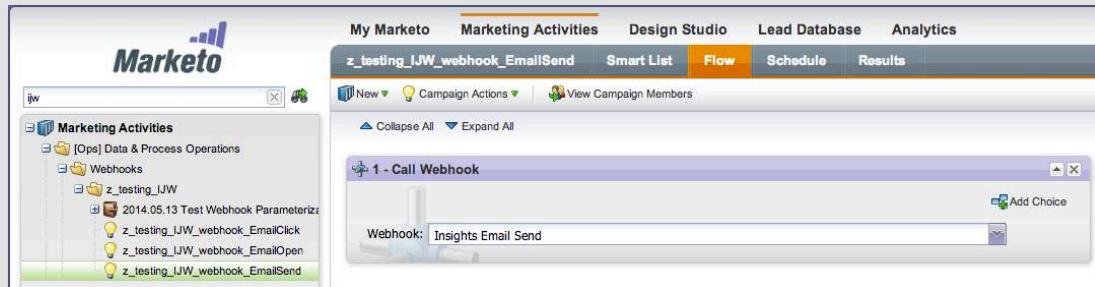
Set up the Marketo program as follows:

Smart List:



The screenshot shows the Marketo interface with the 'Smart List' tab selected. The left sidebar displays a tree view of 'Marketing Activities' under 'Webhooks', with 'z_testing_IJW' expanded to show several sub-items, including 'z_testing_IJW_webhook_EmailSend'. The main content area shows the 'Smart List' configuration for 'z_testing_IJW_webhook_EmailSend'. The 'Email is Delivered' constraint is visible, with a search box containing 'Email: is any'.

Flow Step:



The screenshot shows the Marketo interface with the 'Flow' tab selected. The left sidebar is identical to the previous screenshot. The main content area shows the 'Flow' configuration for 'z_testing_IJW_webhook_EmailSend'. The '1 - Call Webhook' step is visible, with a search box containing 'Webhook: Insights Email Send'.

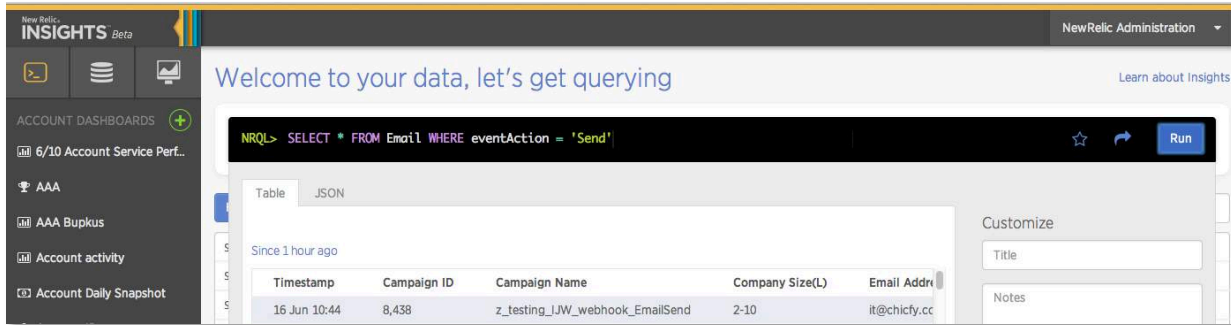
Schedule Step: Make sure to set the qualification rules so “Each lead can run through every time”

3

4

Marketo & Insights | Test, Test, Test

- 1) Build a Marketo campaign to send a test email to yourself (sending a sample email asset to yourself won't trigger the "email is sent" program)
 - For setting up an email test campaign this see Marketo's guide [here](#)
- 2) Query New Relic Insights for your test email by entering the following NRQL query at the NRQL prompt:
 - **SELECT * FROM Email WHERE eventAction = 'Send'**



The screenshot shows the New Relic Insights interface. The NRQL query `SELECT * FROM Email WHERE eventAction = 'Send'` has been entered and executed. The results are displayed in a table format with the following data:

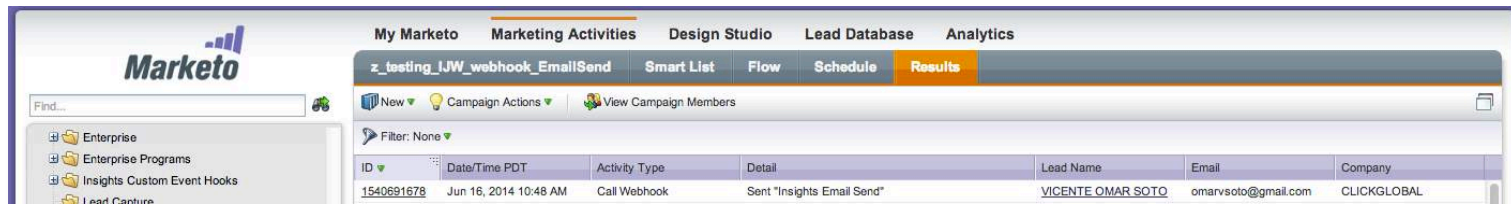
Timestamp	Campaign ID	Campaign Name	Company Size(L)	Email Address
16 Jun 10:44	8,438	z_testing_IJW_webhook_EmailSend	2-10	lt@chicfy.cc

- 3) You should see the result in a Table tab with a timestamp and some of the data from the program

Marketo & Insights | Test, Test, Test

If you don't see your result immediately, try the following:

- Wait a couple minutes and query again
- Check that the Marketo Webhook program has logged an activity for your test email on the Results tab. If no activity logged, wait or try sending your test email again.



The screenshot shows the Marketo interface with the 'Results' tab selected. The table below displays the activity details:

ID	Date/Time PDT	Activity Type	Detail	Lead Name	Email	Company
1540691678	Jun 16, 2014 10:48 AM	Call Webhook	Sent "Insights Email Send"	VICENTE OMAR SOTO	omarvoto@gmail.com	CLICKGLOBAL

- Check that you set the custom header correctly in Step 2 if you see an error like the following:



5

New Relic: Insights | Building a Dashboard

- 1) Enter the following query and then click run:

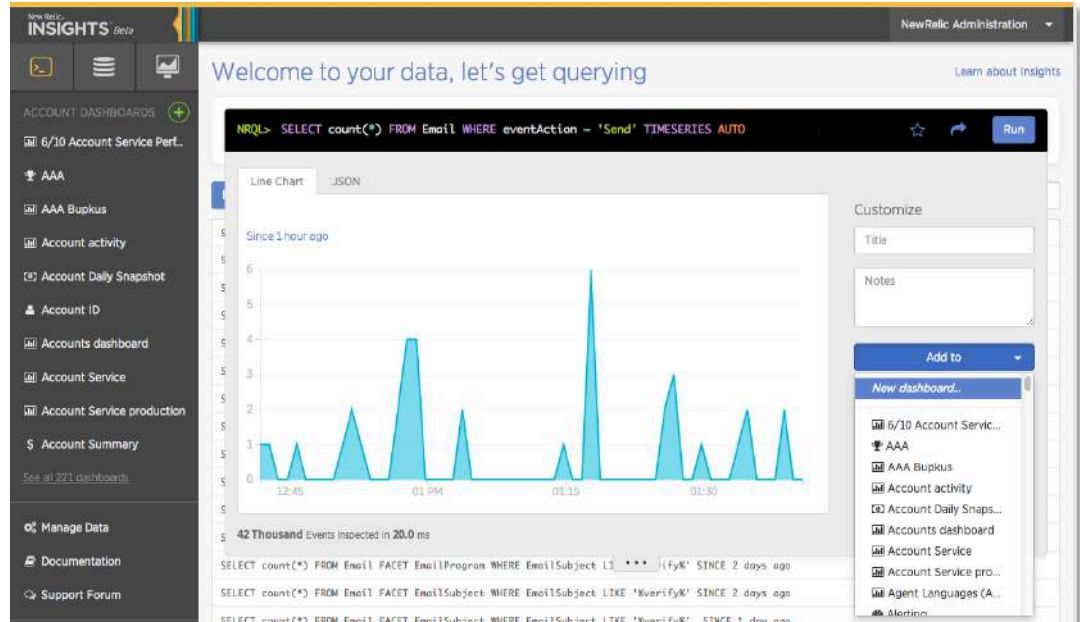
```
SELECT count(*) FROM Email WHERE eventAction = 'Send' TIMESERIES AUTO
```

- 2) When the chart comes up, click on

- 1) “Add to”, and
- 2) Select “New Dashboard” - A new dashboard will then be created.

- 3) Enter the name of your dashboard and edit the label of your chart.

- 4) Add more queries by writing different queries and adding the result to your dashboard.



Marketo | Add More Webhooks! (and Test!)

- 1) Create other Webhooks for Email Open and Email Click, etc.
- 2) For each Webhook, change the value of the “eventAction” field from “Send” to “Open” or “Click,” etc.
- 3) Insert custom fields like “Company Size” as shown in the example below (make sure to add it to your original “email send” Webhook, too).

```
{  
  "eventType": "Email",  
  "eventDetail": "",  
  "eventAction": "Open",  
  "eventInfo": {{SP_Send_Alert_Info:default=null}},  
  "EmailProgram": {{trigger.Name}},  
  "EmailSubject": {{trigger.Subject}},  
  "EmailAddress": {{lead.Email Address:default=null}},  
  "SFDC_Id": {{lead.SFDC Id}},  
  "MktoEventDateTime": {{system.dateTime}},  
  "CampaignName": {{campaign.name}},  
  "CampaignId": {{campaign.id}},  
  "Company Size(L)": {{lead.Company Size (L)}}  
}
```

Edit Webhook

Webhook Name: * Insights Email Send

Description: Push Email Send Event to New Relic Insights

URL: *
https://insights.newrelic.com/beta_api/accounts/1/events

Request Type: * POST

Template:
{
 "eventType": "Email",
 "eventDetail": "",
 "eventAction": "Send",
 "eventInfo": {{SP_Send_Alert_Info:default=null}}
}

Request Token Encoding: JSON

Response type: JSON

New Relic Insights | Enjoy!

- Enjoy your beautiful dashboard!
- Use NRQL to ask ad hoc business questions about your email activity
- Put the dashboard on your second monitor, or display it on a big screen in your marketing department!

