



Optimizely Integration for Marketo Setup Guide

Summary

The steps to configure your the Optimizely Integration for Marketo are:

1. Obtain a BackStage account and login credentials
2. Configure your Optimizely & Marketo accounts in BackStage
3. Add the backstage.js snippet on your page
4. Configure custom audiences and classification rules
5. Create Optimizely experiments

Setup Details

Obtain a BackStage account and login credentials

FunnelEnvy will setup your account on BackStage, and generate your login and password which will be emailed to you.

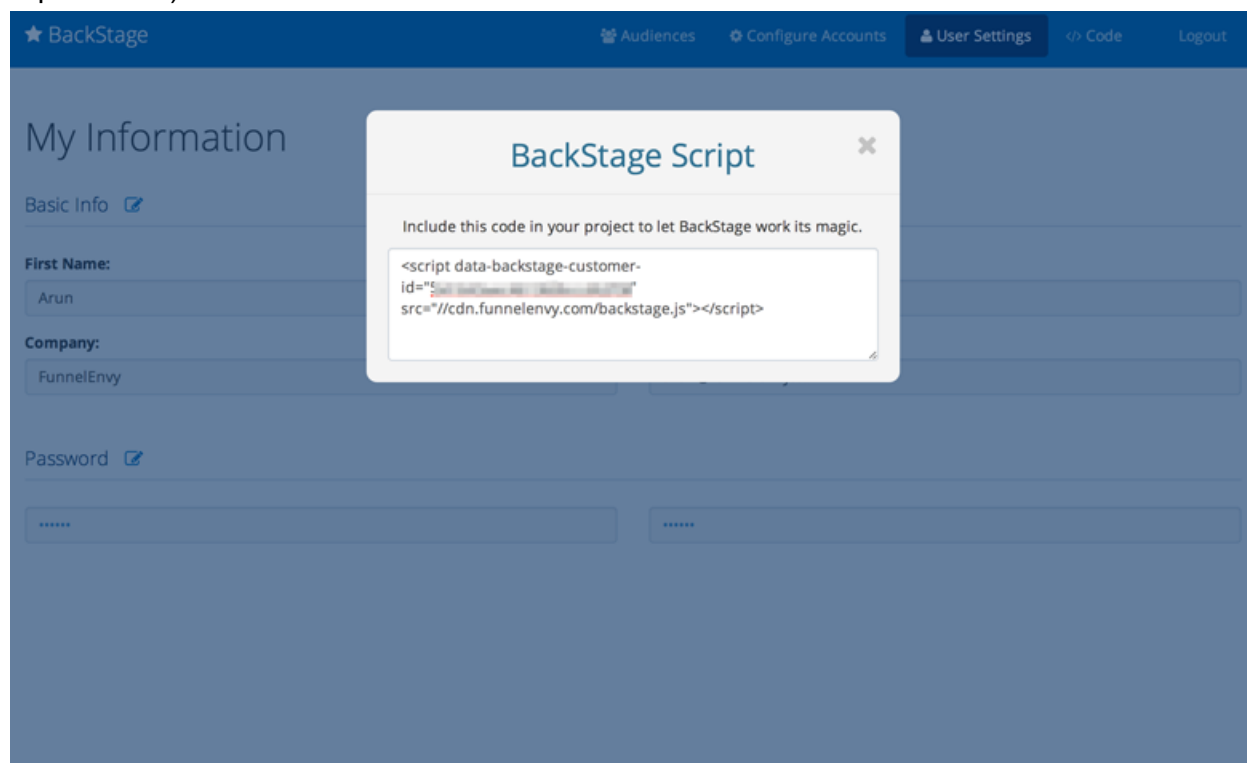
Enter your account API credentials for Optimizely & Marketo

Once you have a BackStage account, login and click on the 'Configure' accounts tab. There you'll be able to enter and save your API keys and other configuration information for Optimizely & Marketo.

A screenshot of the BackStage web application interface. The top navigation bar is blue and contains the text 'BackStage' with a star icon, and several menu items: 'Audiences', 'Configure Accounts' (highlighted), 'User Settings', 'Code', and 'Logout'. Below the navigation bar, the main content area is light gray. It features two sections for account configuration. The first section is for 'Marketo Account', showing the Marketo logo and three input fields for API credentials, with 'Save' and 'Cancel' buttons to the right. The second section is for 'Optimizely Account', showing the Optimizely logo, a checkmark icon, and two input fields for API credentials, also with 'Save' and 'Cancel' buttons to the right.

Add the backstage.js snippet on your page

Click on the “Code” tab in BackStage. You’ll see a popup with the Javascript snippet for your account. This snippet will need to be inserted into your site (where you’re running Optimizely experiments).



We recommend that the backstage.js snippet be added between Marketo’s Munchkin snippet and Optimizely’s snippet on your site.

Configure custom audiences and classification rules

Head over to the “Audiences” tab in BackStage. Here you’ll be able to create your custom audiences as well as add classification conditions to associate Marketo lead attributes with these audiences. You can multiple conditions and condition groups, creating arbitrarily complex rules as necessary for your business requirements.

Audience: Health Care Marketing

Visitors in the Health Care industry with Marketing in their Title

Conditions + Add Condition Group

Title	contains	Marketing	✕	
AND	Industry_c	equals	Health Care	✕
+ Add New Condition				

OR

Title	equals	Sales	✕
+ Add New Condition			

Save Audience Go Back

★ BackStage Audiences Configure Accounts User Settings Code Logout

My Audiences + Add New Audience

- High Lead Score**
Visitors with a high lead score
- CEOs**
Visitors with CEO in their title
- Health Care Marketing**
Visitors in the Health Care industry with Marketing in their Title
- Webinar Attendees**
Lead Source is Webinar
- Optimizely Demo Audience**

When an audience is created or updated in BackStage it will automatically synchronize that audience with Optimizely via the API. You can verify this by going into the audiences tab in Optimizely.

The screenshot shows the Optimizely Backstage interface for a project named 'Backstage Demo 1'. The 'AUDIENCES' tab is selected, displaying a table of existing audiences. A yellow banner at the top of the main content area provides information about visitor segments and segmentation limits.

Looking for visitor segments? They've been converted to audiences and dimensions. [Learn more.](#)

You're currently using 0 audiences and 0 visitor dimensions for segmentation, so you can turn segmentation on for 10 more audiences.

Audiences

NAME & DESCRIPTION	ID	SEGMENTATION	EXPERIMENTS
CEOs Visitors with CEO in their title	1922970089		0
Health Care Marketing Visitors in the Health Care industry with Marketing in their Title	1898570985		1
High Lead Score Visitors with a high lead score	1899351537		1
John's Test Audience	2172280967		0
Optimizely Demo Audience Test	1918390524		0
Test Audience Test	1994871008		0

Create Optimizely Experiments

You can now create Optimizely experiments targeting these custom audiences with Optimizely's user interface. When a visitor arrives at a page which is part of one of these experiments BackStage will automatically retrieve their Marketo attributes (if they exist), classify them into audiences per the configured rules and add them to any relevant audiences.