



**MARKETO INTEGRATION
USER GUIDE**



INTRODUCTION

Marketo is both a CRM (Customer Relationship Management) and marketing campaign management tool. Some clients use a separate tool for CRM functions, and Marketo just for campaign management. However, in this guide we assume clients are using Marketo for both CRM and campaign management.

KEY TERMS

In this document we refer to two different groups: **Agents** and **Users**. The first group, **Agents**, refers to individual end-users (or teams) operating Synthesio dashboards and/or the Marketo platform. The second group, **Users**, refers to social users (i.e. authors of mentions on social networks such as Facebook, Twitter, etc.) that populate within Synthesio dashboards and/or Marketo lists.

INTEGRATION FEATURES

Here are two different ways agents can leverage the Marketo integration within Synthesio dashboards:

1. USER IS NOT A LEAD

If a user doesn't already exist as a lead in Marketo (or his/her info is not available), there are two options an agent can take:

- a. **Create lead:** this action checks if a lead already exists for that user in Marketo, and if not, enables the agent to create a new lead for that user in Marketo.
- b. **Add to list:** this action first retrieves the ID of the lead for that user (from Marketo), and if it doesn't exist, creates a new lead for that user. Then, it enables the agent to add that lead to one or more Marketo lists (**Note:** Marketo lists are dynamically pulled into Synthesio dashboards via API).

Elliott Smith @soundslikepuget 2 Dec
The two cars I'm most interested in so far are the Subaru Impreza and Chevy Cruze. Interested in something medium-small under \$20k new

US + 10.0 Full Story Create Lead 1a

Elliott Smith @soundslikepuget 2 Dec
The two cars I'm most interested in so far are the Subaru Impreza and Chevy Cruze. Interested in something medium-small under \$20k new

US + 10.0 Full Story Add To List 1b

Select list(s)

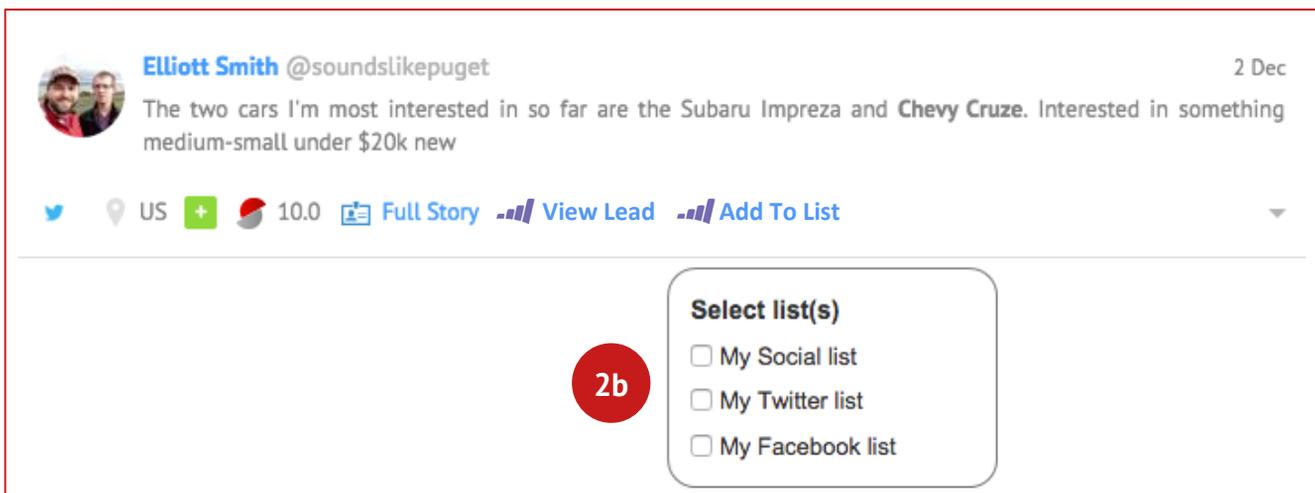
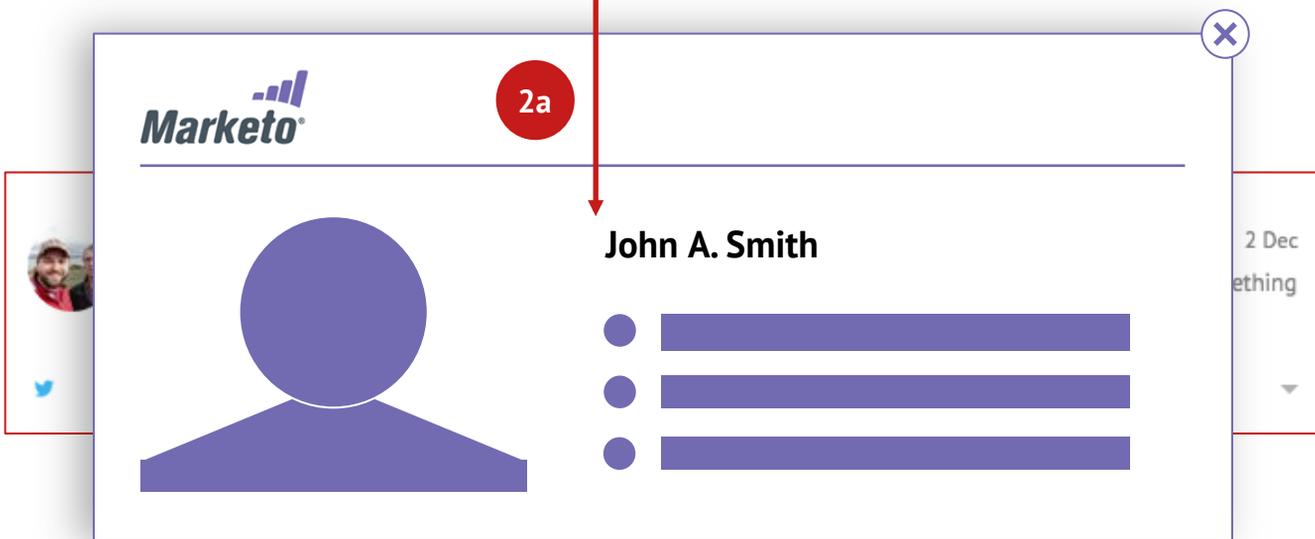
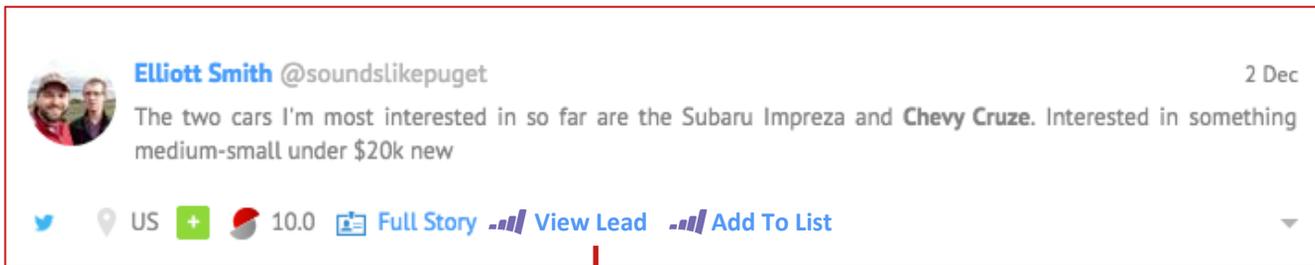
- My Social list
- My Twitter list
- My Facebook list



2. USER IS A LEAD

If a user is already a lead (i.e. already exists in Marketo), it's helpful for the agent to be able to connect that user's information with their mentions. In this case there are two actions an agent can take:

- a. **View lead:** the agent can click a link beneath the mention, which will open a popup window displaying the user's lead record in Marketo.
- b. **Add to list:** even if the lead already exists in Marketo, the agent may still want to add him/her to a specific list.



SOCIAL LEAD CREATION

Create a new Marketo lead from a social user.

Who am I?

I'm a Marketer in Marketo.

What do I want to do?

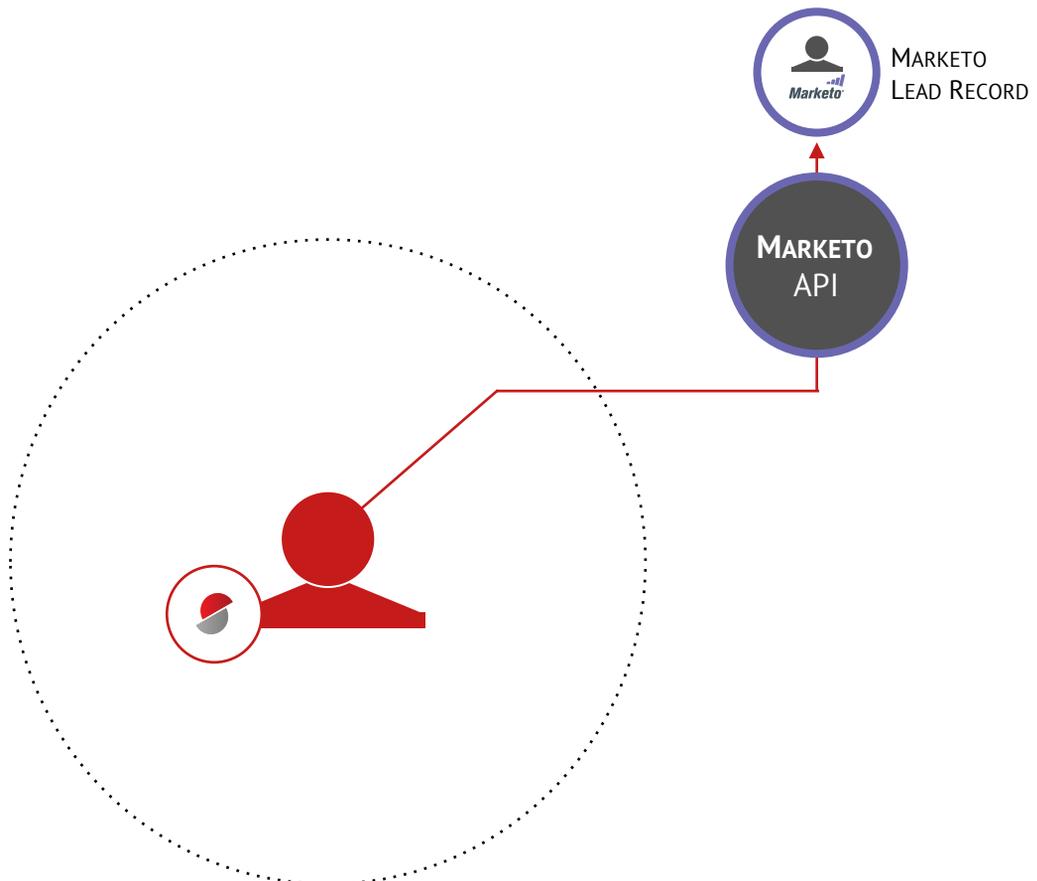
I want to create a new lead in Marketo based on a particular social user in one of my Synthesio dashboards.

Why?

So that I can manage that user in Marketo and include them in future marketing and/or nurturing campaigns.

How do I do this?

The marketer can create a new lead from any mention in a dashboard and then (optionally) add that user to a Marketo list.



LEAD LIST MANAGEMENT

Add social users to lists in Marketo.

Who am I?

I'm a Marketer in Marketo.

What do I want to do?

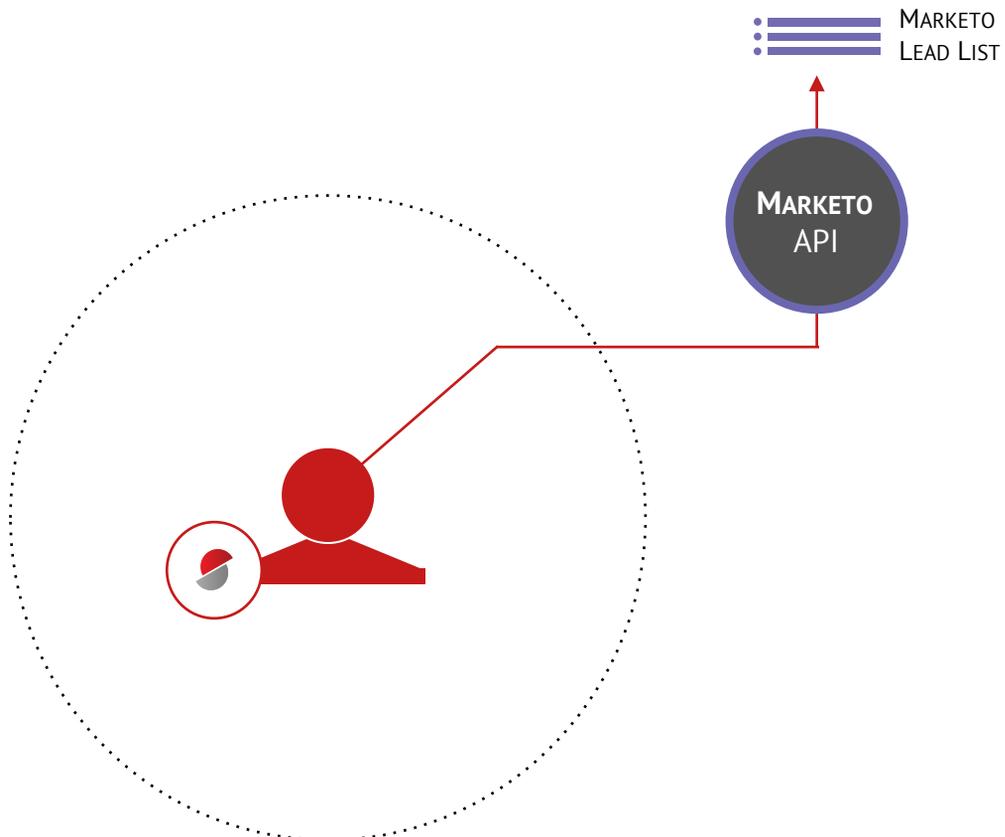
I want to add specific social users to lists I have already created in Marketo.

Why?

So that I can add social users to Marketo lead lists without leaving the Synthesio dashboard I am currently working in.

How do I do this?

The marketer can add any user that is already a lead to any list that has already been created in Marketo (Synthesio dynamically pulls in all Marketo lists).



SOCIAL LEAD LOOKUP

Quickly reference a social user's lead record in Marketo.

Who am I?

I'm a Marketer in Marketo.

What do I want to do?

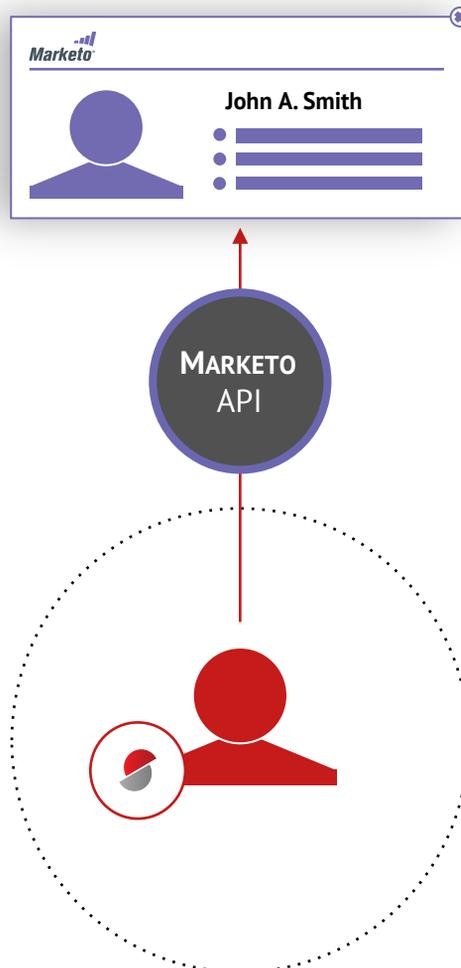
I want to look up a social user's lead information in Marketo without leaving the Synthesio dashboard.

Why?

So that I can quickly reference the lead's information (personal data, campaign history, etc.).

How do I do this?

The marketer can click a link beneath the mention to open a popup window displaying the user's lead record in Marketo.





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ABOUT SYNTHESIO

Synthesio, named the leader in *The Forrester Wave™: Enterprise Listening Platforms, Q1 2014* report, is a Global Social Intelligence Platform. Used by some of the world's top brands, and the agencies that support them, Synthesio is the framework for building social intelligence that provides real business results. Whether an organization's social team is built within Marketing or crosses multiple departments, business units or geographies, Synthesio helps teams listen, analyze, and engage with consumer conversations across social and mainstream media within one platform. Founded in 2006, Synthesio has offices in New York, Paris, London, and Singapore.

www.synthesio.com

