

WHITEPAPER:

How to Unlock the Power in Your Marketo Programs



In many organizations just getting started with Marketo, programs tend to be more technical than strategic. Marketo becomes the workhorse of marketing automation, which is a great place to start. Each of the programs contains tasks to complete, such as managing event registration, tracking downloads or sending an email campaign. However, what's often overlooked is Marketo's ability to streamline operations and provide valuable insight beyond clicks, views and registrations.

When set up properly, Marketo programs can support global processes and simplify operations across your marketing organization, saving time and money, and answering critical questions about how to better target your market and improve conversion rates. In this paper, we'll dive deeper into Marketo to uncover some hidden gems. We'll explore how to:

- Leverage tokens and templates to support content creation and design templates
- Use channels, tags and tracing campaigns to deliver accurate program conversion and opportunity impact reporting
- Integrate marketing programs with global operational programs for streamlined system setup and improved system performance
- Take a phase-by-phase approach to applying best practices to your current program setup

PROGRAM TOKENS AND TEMPLATES

How do you begin to unlock the power of Marketo and maximize your investment in the platform? A good place to start is tokens and templates. Tokens can improve conversion and efficiency and make maintenance more manageable. For clients with a high volume of programs, tokens and templates make it easy to leverage a centralized set of design assets, eliminating redundancy and duplicated work.

While some of DemandGen's clients use tokens to personalize emails and landing pages with the recipient's name, this is just the tip of the iceberg. Program tokens are a way to up-level token use within a program and move beyond simply populating a field with information from the lead file.

With program tokens, you can define content at the program asset level, all at once, for emails, landing pages and other elements. You can define template creative elements, such as colors and images, simplifying setup and increasing consistency across all programs.

Marketo offers a large variety of token types to dictate format and content. Once the template is built, you can clone it, and the token values are transferred to the new document.

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program. Additionally, you can use token values to track hidden form submissions. In this way, you can collect lead information related to specific pieces of content, rather than asking people to fill out forms. Token levels update with new information once someone clicks a link for a particular asset, which is useful for tracking and reporting on program results.

CHANNELS AND TRACKING CAMPAIGNS FOR BETTER PROGRAM PERFORMANCE

Today's marketers are "on the hook" for MQL creation and conversion like never before. It's no longer just about how many clicks; we have to demonstrate how programs impact the business.

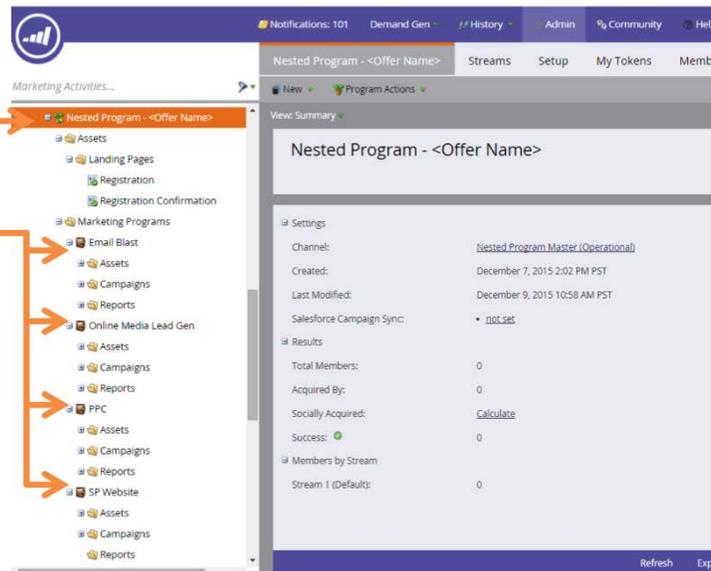
Channels and tracking campaigns are the basis for Marketo program reporting.

Parent: Engagement Program: Offer

- Contains common landing pages tied to global forms

Child: Default Programs: Channel Tracking

- Contains channel specific assets (emails)
- Contains tracking campaigns based on form fills



By defining and tracking the proper statuses, you can measure the impact of your program beyond tactical measures such as click-throughs and downloads to look at MQL conversion and how your programs are impacting the business.

In Marketo, channels are associated with programs. Marketo uses standard channels to track leads as they move through common program statuses. Right out-of-the-box, the majority of channels focus on emails related to a particular program: has the email been delivered, open and so on—but this is just the tactical report. Using statuses, you can get a look beyond the tactical stuff and start tracking milestones. You may need to update the channels to do so.

Here are some program performance report examples of leveraging channels and channel tracking campaigns to give clients the answers they need.

In this first example, we looked at a particular asset and how it was performing in the various channels through which it was promoted. We created a structure with nested programs within a parent program to track how the channels performed. The approach leverages the engagement program structure as the "offer" level, which

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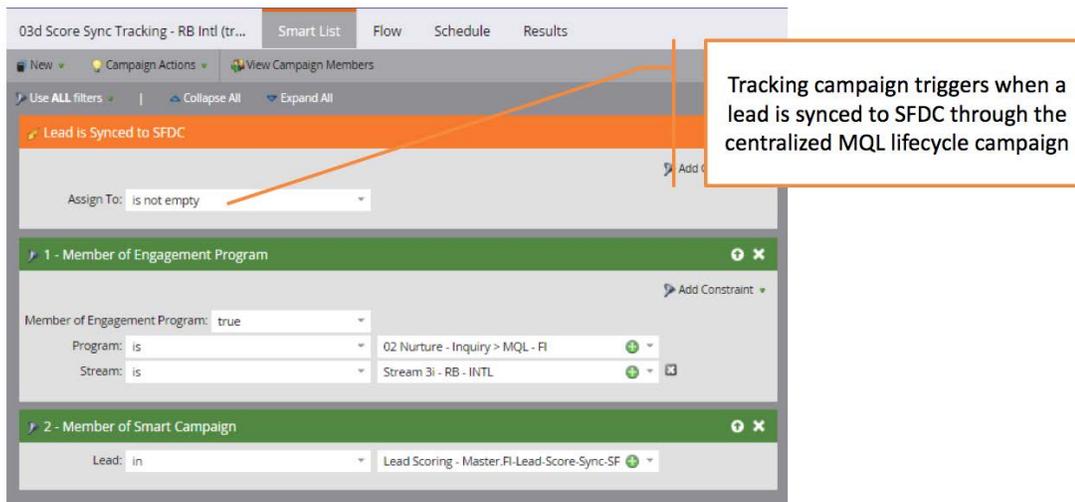
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contains elements common across all channels. The next level, or “child,” tracks a campaign specific to a channel, such as an email. It also contains the tracking campaigns specific to that channel.

In this scenario, all channels are tracked separately, and based on the source for the form fill, they trigger a flow and update the program status for the channel. This enables you to deliver a report in which you see a breakdown of channels as well as an aggregate view of how the offer is performing overall, across channels. That way, you can compare the results to other programs with different assets and determine which assets are driving more traffic.

In this next example, a client wanted to measure the impact of a nurture campaign by tracking how many members were qualifying as MQLs. This can be difficult, because it requires knowledge of when a prospect became an MQL—was it before or after they entered the nurture program, or was the lead recycled? This type of reporting requires forethought; you must think ahead about what you’d like to report on, set the appropriate channel statuses and make it active before starting your campaign. Trying to backfill this information through batches is nearly impossible.

Here you can see how many members in the nurture program moved to the MQL stage. When that lead becomes an MQL, as defined by its syncing to Salesforce, the action triggers a campaign, updating the program status. It’s a simple solution for tracking when the lead becomes qualified, but keep in mind, it must be set up in the planning stage, before you start running the program.



GLOBAL INTEGRATION

Eventually, you can move to global integration, the stage in which programs and global functions are integrated to eliminate redundancies in processes, inconsistencies in lead processing, and the overall number of programs and assets requiring long-term maintenance.

Many clients who have been using Marketo for years began by building out templates and programs, but didn’t think how they would all connect or evolve in the long-term. Given the sheer volume of programs running, it’s often difficult to maintain

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assets tied to them. To simplify this process, you should have a grasp on what can be centralized and how other programs can tap into those centralized processes and assets.

Without a global approach, standard processes such as changing lead scores, synching with Salesforce and the like are specific steps within a program smart campaign. Although this is functional, it can cause issues. Without a centralized, integrated process, there's really no consistency across how a lead is handled. The same activity can be worth different values—it becomes subjective. Sales can get confused by getting two different types of leads for the same company or person. People could be normalizing to different values, resulting in scattered data.

Some key processes to centralize and integrate include:

- **Lead scoring:** With lead scoring and programs, the biggest point of integration between the two is embedding something in the lead score model that triggers off when program statuses update. For example, if you upload an attendee list for an event, also change the status field to update the scoring. The “adding to list” trigger can be tricky if people don't follow the convention perfectly; using the status field eliminates the need for naming conventions and can be leveraged across all the various programs.
- **Lead lifecycle tracking:** While many companies rely on certain actions to bypass the scoring requirements and fast-track a lead over to sales as an MQL, it's important that program managers don't artificially up-level lead scores because it could muck up the integrity of your scoring model. Instead, if a certain action has high enough value, simply update the program status to MQL. In this way, scoring remains the same; you just flag the status for an event. This ensures all proper normalization is completed and the required fields are updated before the lead is sent to sales.
- **Global forms:** Hidden fields are essential when using global forms, because different programs track different values. When using progressive profiling, for example, you may capture specific information in a certain order across multiple interactions, relying on hidden fields to track which programs activate when someone fills out the forms. Without integration, multiple programs could trigger and it would be impossible to attribute the lead to a specific program. A global template enables you to track a lead's activity using just one form, rather than having to update multiple forms.

Perform this assessment annually, or more frequently, so you can be proactive instead of having to put out fires after the fact, as happens all too often in marketing.

TAKING IT TO THE NEXT LEVEL

When you set about unlocking the hidden power of Marketo, tokens are the low-hanging fruit. Say you are promoting a road show in five different cities, and only the time and location are changing in the email. Using a token to update these bits of information is the quickest, most efficient way and a good place to start.

Once you master using tokens in templates where you have standardized content, move to channels then global integration. Consider how the channels are operating:

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can you incorporate more key milestones to track the impact marketing is making on the business? Using statuses and reporting them within Marketo or Salesforce might be the best way to go.

Finally, when you tackle global integration with centralizing scoring and routing in your data management processes, think about how you can eliminate redundancies and unnecessary parallel processing to streamline program operations.

DemandGen has the expertise and experience to help you unlock the power of Marketo by leveraging advanced features and capabilities. Give us a call to discuss how we can help you maximize your investment.

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