

GaggleAMP/Marketo Integration Guide

Table of Contents

1. Overview
2. Requirements
3. Lead Attribution
 - a. Field Setup
 - b. Program Setup
 - c. GaggleAMP Source Tracking
 - d. Campaign Tracking
 - e. Salesforce Sync
4. Reporting

Overview

This document describes how to connect GaggleAMP's content amplification solution to your Marketo instance in order to attribute leads to and show the ROI of your amplification efforts. Instructions are also including for syncing the attribution to data to your Salesforce.com CRM to be able to see closed loop revenue reporting.

Requirements

1. A GaggleAMP Manager with Full Access will need to ensure that "Marketo" is configured as the Connected Marketing Automation tool in GaggleAMP.
2. A Marketo Administrator will need to be available to complete the Marketo portions of the setup and update it as necessary.
3. (Optional) A Salesforce.com Administrator will need to be available to setup the Salesforce.com connection.

Lead Attribution

This section walks you through the steps to capture lead attribution data from GaggleAMP for your Marketo Leads.

Field Setup

To set up the fields, go to the Admin section in Marketo and select Field Management. Then create the following fields:

Type	Label	API Name
String	GaggleAMP Source	gaggleampSource
String	GaggleAMP Campaign	gaggleampCampaign

Program Setup

To setup a program, go to the Marketing Activities section, click New Program, give it a name of “GaggleAMP Visitor Tracking” and then click Create.

GaggleAMP Source Tracking

Now, we are going to setup a Campaign with the “GaggleAMP Visitor Tracking” program to track all Leads that were sourced from GaggleAMP.

To setup this campaign, click on the “GaggleAMP Visitor Tracking” Program and then:

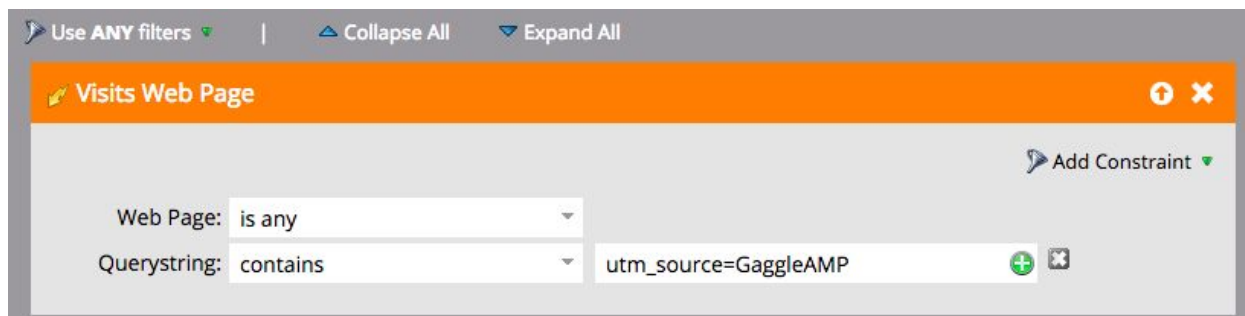
1. Create a new Campaign Folder with a name of “Source Tracking” under “GaggleAMP Visitor Tracking”
2. Create a new Smart Campaign and name it “utm_source=GaggleAMP”
3. Drag the newly created Smart Campaign into the “Source Tracking” folder

The Program should now look like this:



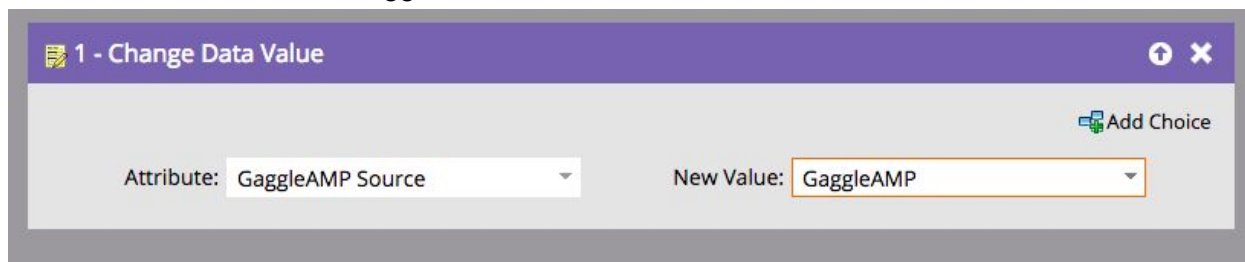
Next we will configure the Campaign. Click on the “utm_source contains GaggleAMP” Campaign, navigate to the “Smart List” tab and then:

1. Select “Use Any filters” in the upper-left rule logic dropdown
2. Add a “Visits Web Page” trigger with 2 constraints:
 - a. Web Page is any
 - b. Querystring contains “utm_source=GaggleAMP”



Now navigate to the “Flow” tab and then:

1. Add a “Change Data Value” step
2. Choose “GaggleAMP Source” as the Attribute
3. Set New Value to “GaggleAMP”



Finally, navigate to the “Schedule” tab and click “Activate”.

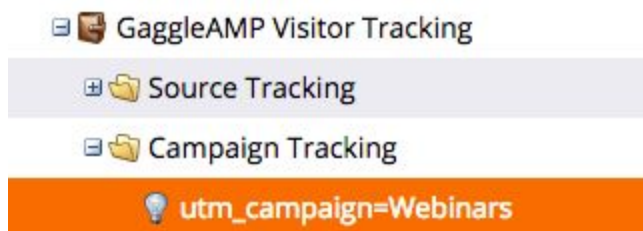
Campaign Tracking

To setup Campaign-based tracking, you will first need to prepare a list of the Campaigns you want to create.

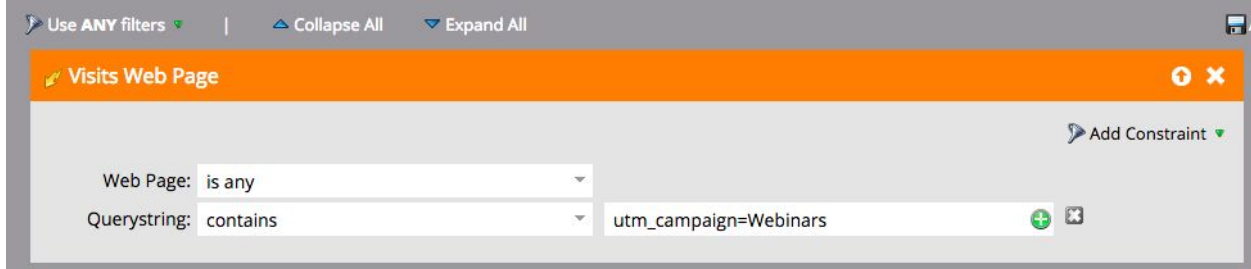
Next, create a new Campaign Folder in the “GaggleAMP Visitor Tracking” Program and name it “Campaign Tracking”.

Now, we will need to setup each Campaign in both Marketo and GaggleAMP. The following instructions will show how to setup your first Campaign in both solutions. For this example, we will call the Campaign “Webinars”.

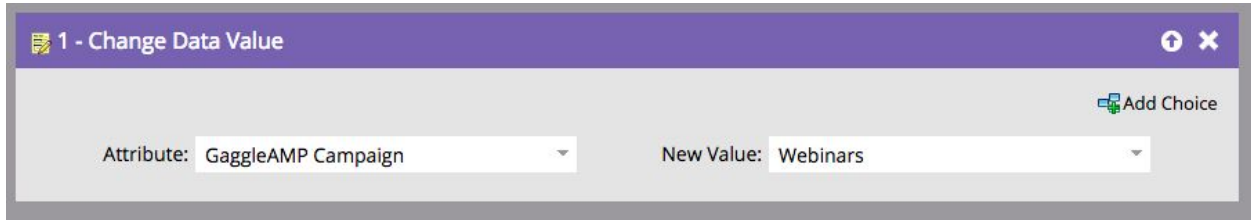
To setup a Campaign in Marketo, create a Program for each Campaign in your list.



Configure the Smart List as we did for Source Tracking, but set the 2nd constraint to “Querystring contains utm_campaign=Webinars”. (For other campaigns, replace “Webinars” with the name of the other Campaign)

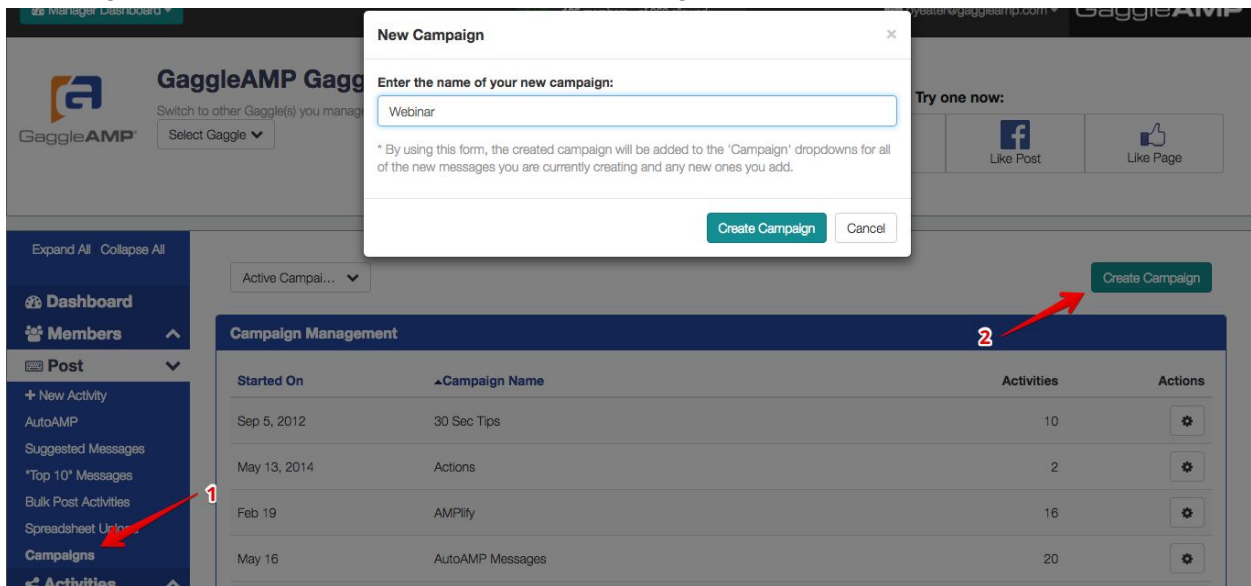


Configure the Flow with a Change Data Value step that sets the “GaggleAMP Campaign” Attribute to a New Value of the name of the Campaign, (in this example: “Webinars”)



To finish up the Marketo setup, navigate to the schedule tab and then Activate the Campaign.

To setup the Campaign in GaggleAMP, the Gaggle Manager will need to 1) navigate to the Campaigns tab and then 2) click the Create Campaign button.



Repeat these steps for each Campaign in your list.

If you would like to add an additional Campaign in the future, you will need to use these instructions to add the Campaign to GaggleAMP and then create a Campaign in Marketo under the “Campaign Tracking” folder

Salesforce Sync

Once you've completed setting up Source, Campaign and/or Partner tracking, you can sync the attribution data with Salesforce to generate reports and see the closed loop ROI from amplifying your content.

Consult this PDF for information on syncing Marketo to Salesforce:

<http://pages2.marketo.com/rs/marketob2/images/Marketo-and-SFDC-for-New-Customers.pdf>

Reporting

This section walks you through how to create a Report in Marketo on how many Leads the traffic driven by GaggleAMP has delivered to your Marketo instance.

To get started navigate to Marketing Activities in Marketo and locate the “GaggleAMP Visitor Tracking” Program. Once there, create a Report inside the Program:

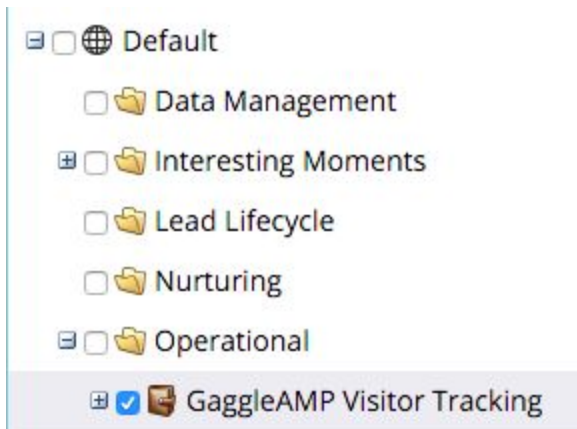
1. Add a New Local Asset of the Report type to the Program
2. For the New Report, use type “Leads by Campaign” and name “GaggleAMP Leads by Campaigns Report”

The Program should now look like this:



Next, click on the Report and navigate to the “Setup” tab and then:

1. Drag the “Campaigns” Filter into the Settings
2. When Prompted in the Campaign Filter, locate the “GaggleAMP Visitor Tracking” Program and enable it by checking the box.



3. Click “Apply”

That’s it! Now navigate to the “GaggleAMP Leads by Campaigns Report” tab to view your Report:

GaggleAMP Leads by Campaigns Report

Report Smart List Setup Subscriptions

Report Actions

Lead Created At: Last 7 Days (Jan 9, 2016 - Jan 15, 2016 PST), Campaigns Smart List: no rules

GaggleAMP Leads by Campaigns Report

- Report**
View or export your report
- Smart List**
Define the Smart List for this report
- Setup**
Configure the report settings and filters
- Subscriptions**
Receive the report by email

MEMBERS	Count
GaggleAMP Visitor Tracking.utm_source=GaggleAMP	4
GaggleAMP Visitor Tracking.utm_campaign=Blog Posts	1
GaggleAMP Visitor Tracking.utm_campaign=Webinars	1

Updated Jan 15, 2016 11:48 AM PST

Style Full Screen Export

Finally, navigate to the Subscriptions tab and schedule this reported to be emailed weekly to the GaggleAMP Gaggle Manager(s) for your company.