

TOTANGO

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Totango-Marketo Implementation Best Practices

Set up Totango to automatically identify critical events happening in your customer's lifecycle. Doing so will automatically segment accounts into onboarding steps, identify accounts at risk, and trigger alerts notifying relevant team members. Let Totango know what's important and the system will be your customer success "eyes and ears", reporting back when customers require your attention.

Totango will also track performance trends over time so you can see your progress and learn what you can do to improve.

Step 1: Preparation and Integration

First, a developer will need to install Totango on your web application to collect engagement data. Start by completing the integration worksheet to help your dev team to do this quickly and efficiently.

- Use the [Totango Integration Worksheet](#) to prepare integration guidelines for your dev team
- Direct your developers to our [Developer's section](#) for tech documentation

Step 2: Configure Totango

Bring meaning and significance to data flowing from your web application by defining Active-lists on Totango that will create segments of interest.

- [Configure an onboarding flow](#): onboarding and established customers
- [Creating risk levels](#): Red, Yellow, Green accounts

Step 3: Integrating Salesforce.com (Optional)

If your team uses Salesforce.com you may want to integrate Totango to enable the two systems to seamlessly share data. Also your team can leverage Totango insights right from within their Salesforce.com.

- [Overview of Totango for Salesforce](#)
- [Installing instructions](#)

Lifecycle Marketing – Configuration Guide for Marketo Integration

For a more detailed understanding on how to use Totango insights as Macros for Smart Campaigns and creating nurturing assets after you've installed Totango to your web application; check out this [Configuration Guide](#). Screenshots are provided.