

# Marketo-Gainsight Integration

## Quick Start Guide



### Automate Customer Success Campaigns

Native Salesforce architecture allows Gainsight to utilize any Salesforce object. With Marketo's native Salesforce integration, any data point Gainsight adds to a Salesforce account - be it the customer health score, NPS or alerts - can easily be accessed for Marketo campaigns.

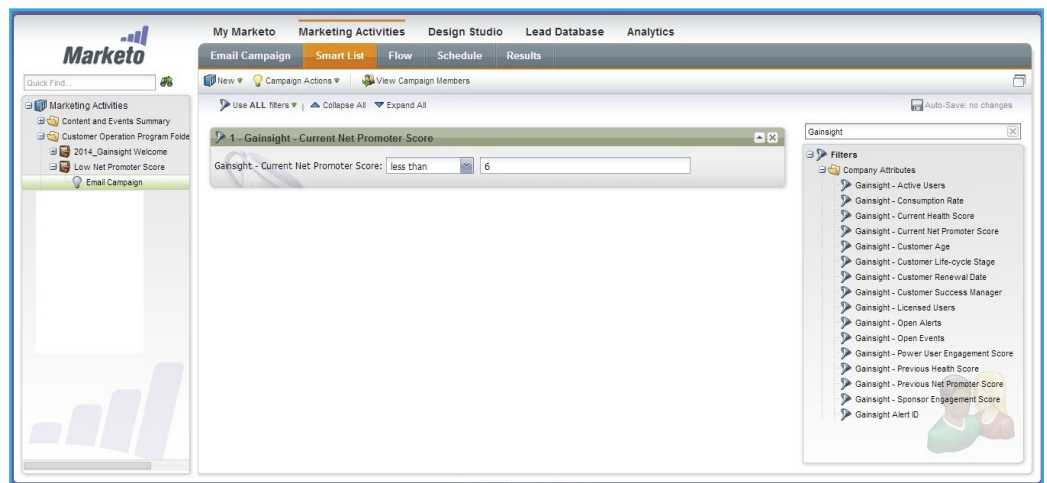
### Seamless Integration - No IT Required

The screenshot shows the 'Create an Alert' configuration page in Marketo. It is divided into two main sections:

- 1. Define when an alert should be created based on Survey:** This section includes a dropdown for '1. Question: On a scale of zero to 10, how likely are you to refer to a friend or colleague?'. Below it, a vertical list of numbers (4, 5, 6, 7) is shown with a selection box around the number 6. There is an 'OR' dropdown and an 'Add Question' button.
- 2. Define alert attributes with which the alert should be created:** This section contains several dropdown menus:
  - Severity: Red
  - Type: Potential Churn
  - Reason: CSAT Issues
  - Status: None
  - Playbook: Low Survey Rating
  - Task Owner Field: Owner ID
  - Default Task Owner: (empty field)

**Step 1:** Create a Gainsight rule to monitor significant events, generate alerts, and push pertinent data to a Salesforce account object.

**Step 2:** Utilize Gainsight data from Salesforce's account object to create customer success campaigns within Marketo.



Contact your Gainsight Customer Success Manager for configuration guidance.