



Marketo Crownpeak Platform Integration Playbook

Version 0.99

© 2016 Crownpeak Technology, Inc. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or any information storage and retrieval system, without permission from Crownpeak Technology.

Document History

Author/Editor	Date	Reason for Change	Version
Oscar Bonifassi	8/4/2014	Draft Version	0.92
Oscar Bonifassi	10/1/2014	Addition of Marketo Connector	0.93
Oscar Bonifassi	11/15/2014	Addition of Marketo API Connector	0.94
Oscar Bonifassi	12/15/2014	Addition of Munchkin Tracking Script	0.95
Justin Neely	2/20/2015	Copyediting	0.96
Oscar Bonifassi	3/9/2015	Responses to questions posed	0.97
Denise Duncan	4/2/2015	Clarification of connectors and outcome	0.99

Table of Contents

Marketo Crownpeak Platform	1
Integration Playbook.....	1
Document History.....	2
Overview	4
Benefits	4
Business Process for Marketo Configuration	5
Configuring Marketo	6
Presentation Layer	6
Embed existing Marketo Forms	6
Marketo Tracking Code.....	9
Basic Crownpeak Platform Layer	10
Sending Data to Marketo Using WCO.....	10
Advanced Crownpeak Platform Layer.....	15
WCO Targeting with Marketo	15
Using the Marketo Crownpeak Platform Integration	18
Notes.....	18
Implementation Guidelines	19
Playbook Notes	19

Overview

Marketo is a leader in marketing automation software. The Crownpeak Platform allows you to integrate Marketo to enable users to apply existing data to personalize website content and to generate new leads. This document explores how to configure this functionality for users within the Crownpeak Platform.

Crownpeak subscribers should consider leveraging Marketo integration to

- Extend the capabilities of Crownpeak Platform's Web Content Optimization (WCO) to begin personalizing experiences and targeting users based on individual lead record information
- Create leads that are sent to and managed in Marketo

Benefits

- Improving website experiences for customers using personalization with little effort required
- Maintaining data in a single location, the Marketo database, while still taking advantage of that information and the features of WCO to personalize web page content.

Business Process for Marketo Configuration

Marketo can be configured to support many lead capture and personalization. Before starting the hands-on configuration process, it's helpful to clarify the scope of the configuration. Use these questions to create an integration plan:

1. Is there an existing Marketo account and a designated administrator managing the information?
2. Is lead tracking enabled on the website(s)?
3. Are there existing Marketo forms that need to be used on the website to generate leads?
4. Is there interest in personalizing experiences and targeting users based on lead information?

Configuring Marketo

Once the integration plan is complete, Marketo Crownpeak Platform integration can begin.

When these configuration steps are completed, here are the integrations that will available

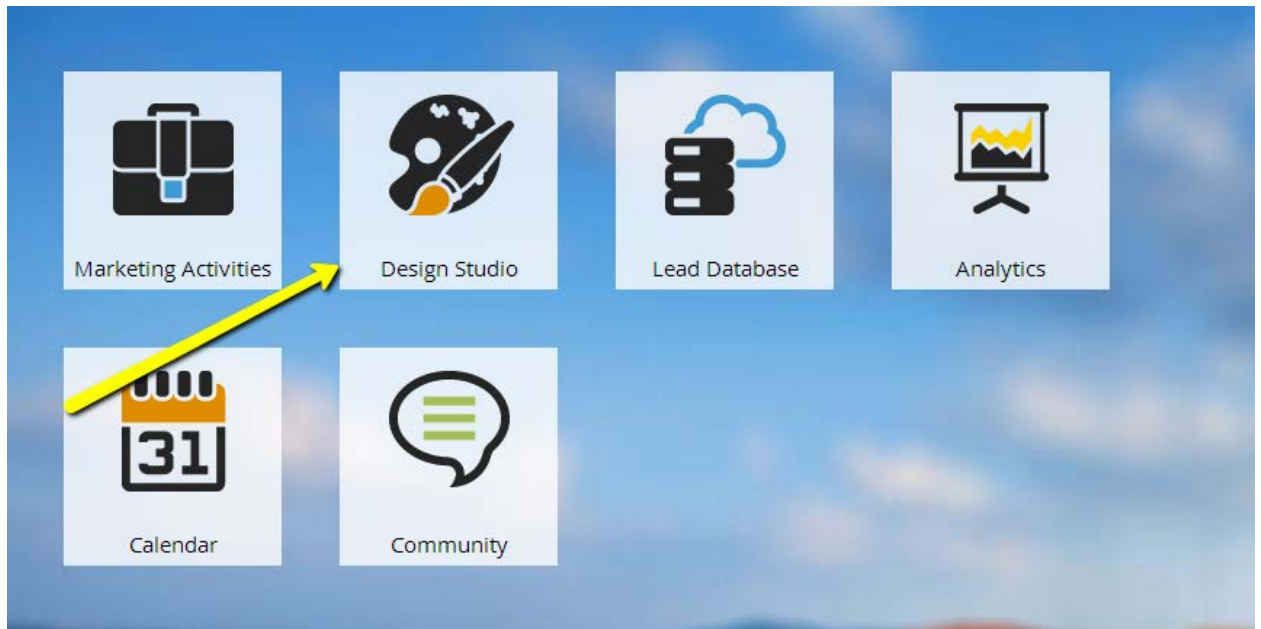
- Push
 - Uses form connectors in WCO. Content from WCO is pushed to Marketo as well
 - Manually configured to pass name value pairs through a form
- Pull
 - Integration Connectors for targeting groups in WCO. Personalize site content by pulling information from Marketo
 - Marketo API as well as Demandbase available. Requires user information to configure

Presentation Layer – What is required in Marketo?

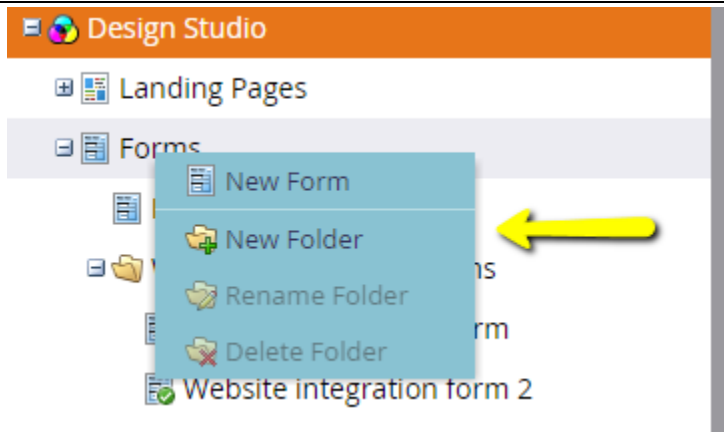
Embed existing Marketo Forms

Follow these steps to integrate an existing Marketo form into a Crownpeak Platform-managed website. The designated Marketo administrator has access to Marketo-generated code that can be used to embed the form in the Crownpeak Platform. The administrator can obtain the code by following the steps below.

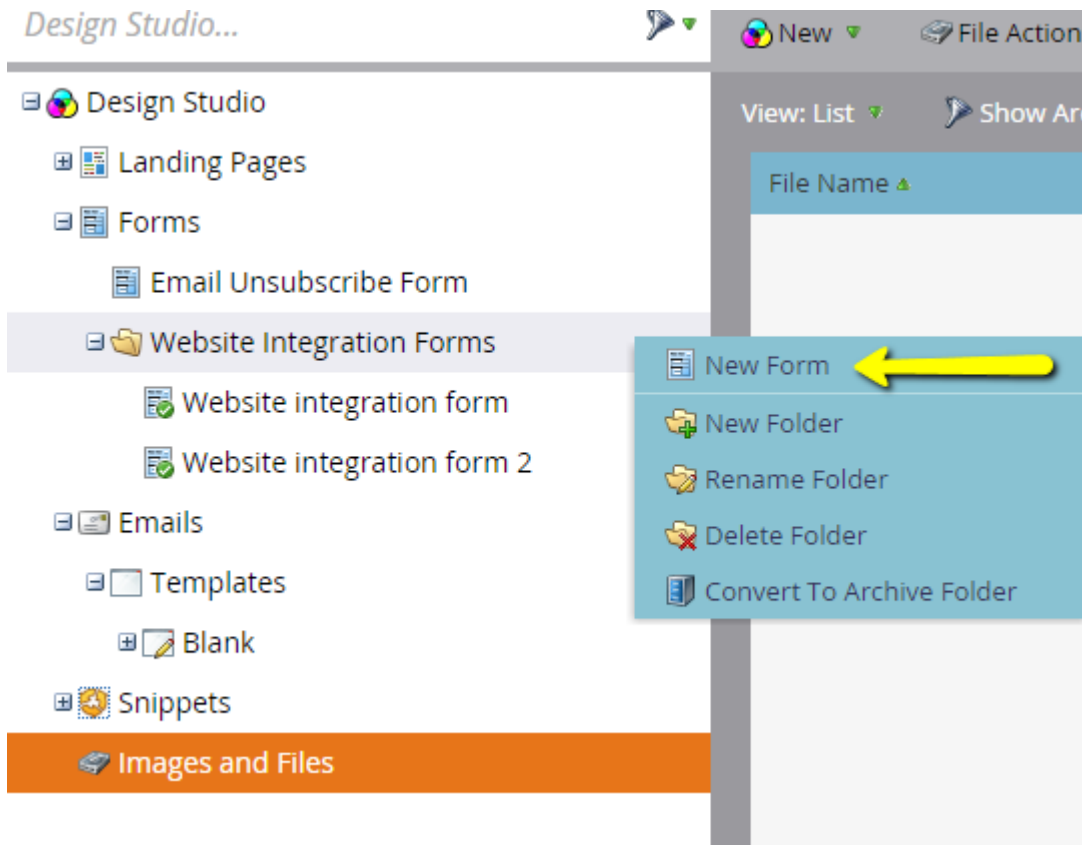
1. The Marketo administrator should log in to their account by navigating to the appropriate URL (<https://login.marketo.com/>).
2. Next they should select the Design Studio tab.



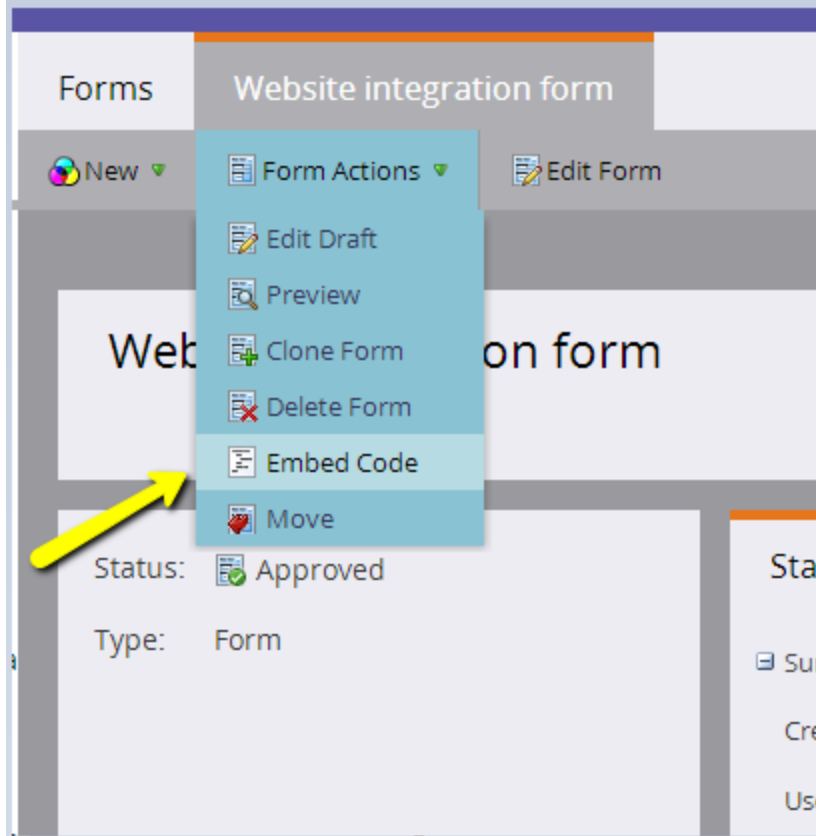
3. Within the Design Studio menu, they should right-click the **Forms** label and select **New Folder**.



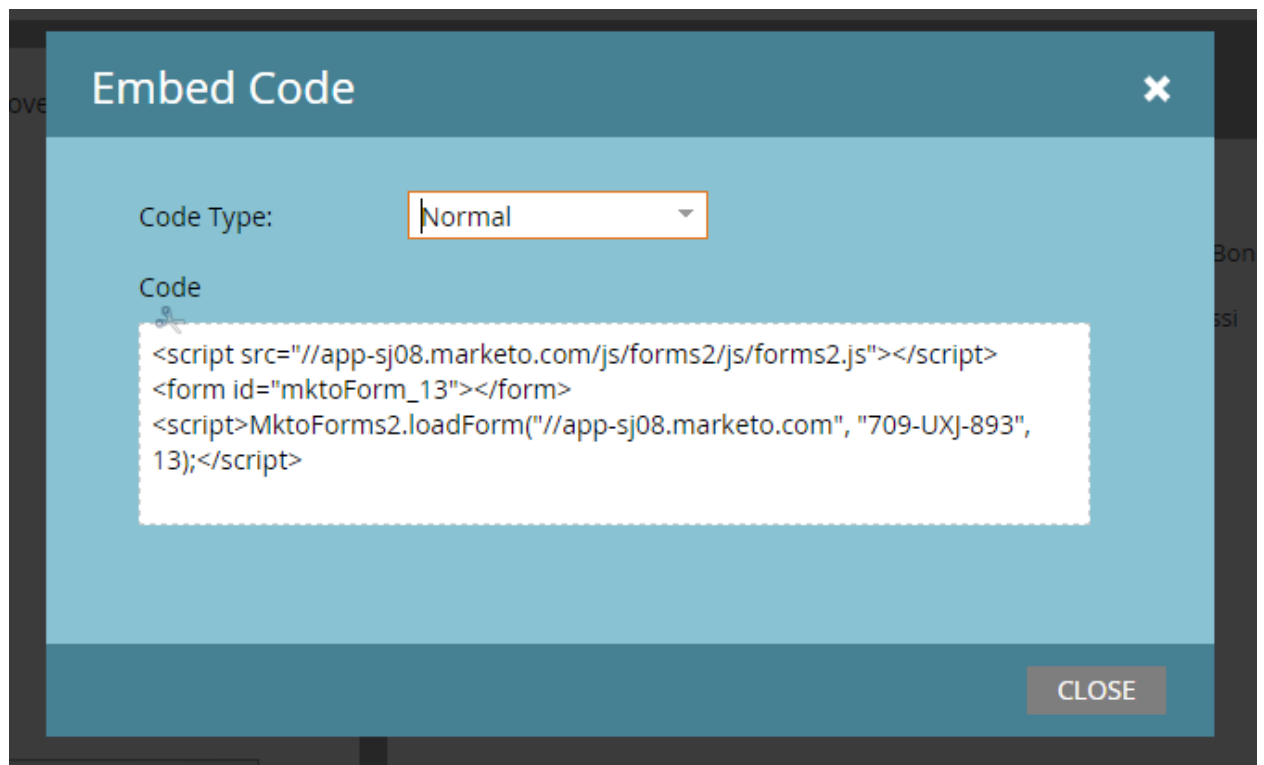
4. They next enter a folder name (any name they'll recognize is fine).
5. Once that newly created folder appears in the menu, they can right-click on it and select **New Form**.



6. The admin should then enter a name for the new form.
7. They can then use the built-in Marketo wizard to create the new form.
8. When the wizard has completed the creation process, they should right-click on the form and select **Embed Code**.



9. The administrator can then select and copy the code generated by Marketo.



-
10. The administrator can then provide the code to the Crownpeak Professional Services team, along with the following information:
 - A. What template will use the form?
 - B. Are there any additional layout requirements?

Marketo Tracking Code

Follow these steps to enable a Marketo standard tracking JavaScript to begin tracking users who visit the website.

1. The Marketo administrator should provide the following generated JavaScript code provided by Marketo.

- 1) `<script src="http://munchkin.marketo.net/munchkin.js" type="text/javascript"></script>`
- 2) `<script>`
- 3) `Munchkin.init("###-###-###");`
- 4) `</script>`

In the code above, `###-###-###` is the Munchkin account ID for the Marketo account.

* Please note that the Munchkin.Init function call does not return a status.

2. Add that Marketo/Munchkin code to the Crownpeak Platform by embedding it in one of the following ways:
 - A. Add it to the Navigation Wrapper for the website where it will be used and have every page reference the information.
 - B. Use a common include or template to embed the code instead of manually adding it to every page.

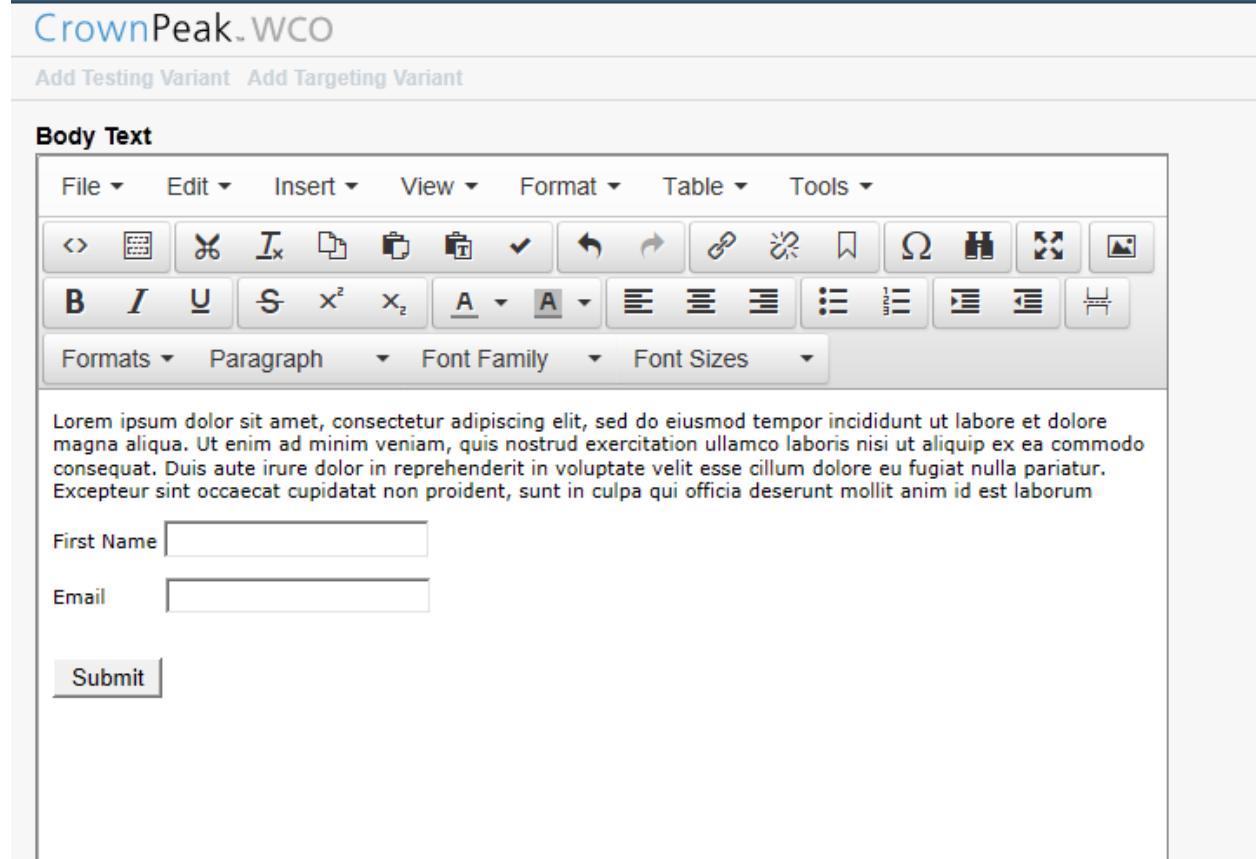
Basic Crownpeak Platform Layer

Push: Sending Data to Marketo Using WCO

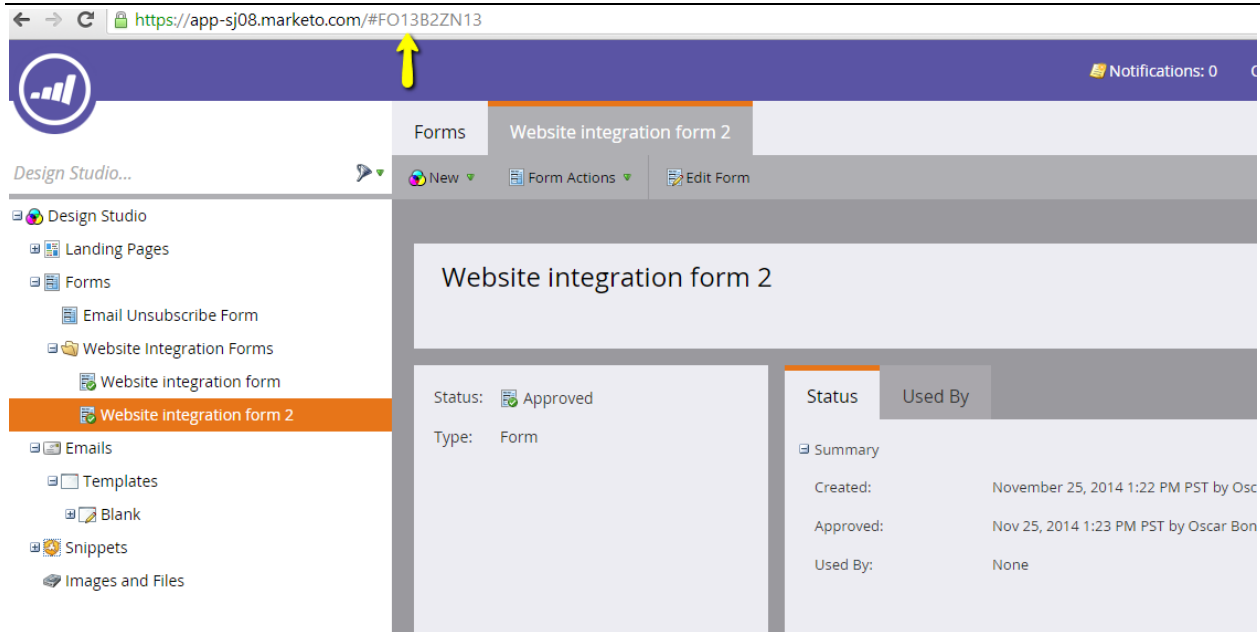
When form data is submitted from a published page, the data is posted to the WCO server. With this configuration, the WCO form is mapped to a form in Marketo and it is credited. This is essential to ensure we can be take advantage of campaign events in Marketo.

Follow the steps below to use Crownpeak Platform’s WCO (Web Content Optimization) to submit data to Marketo.

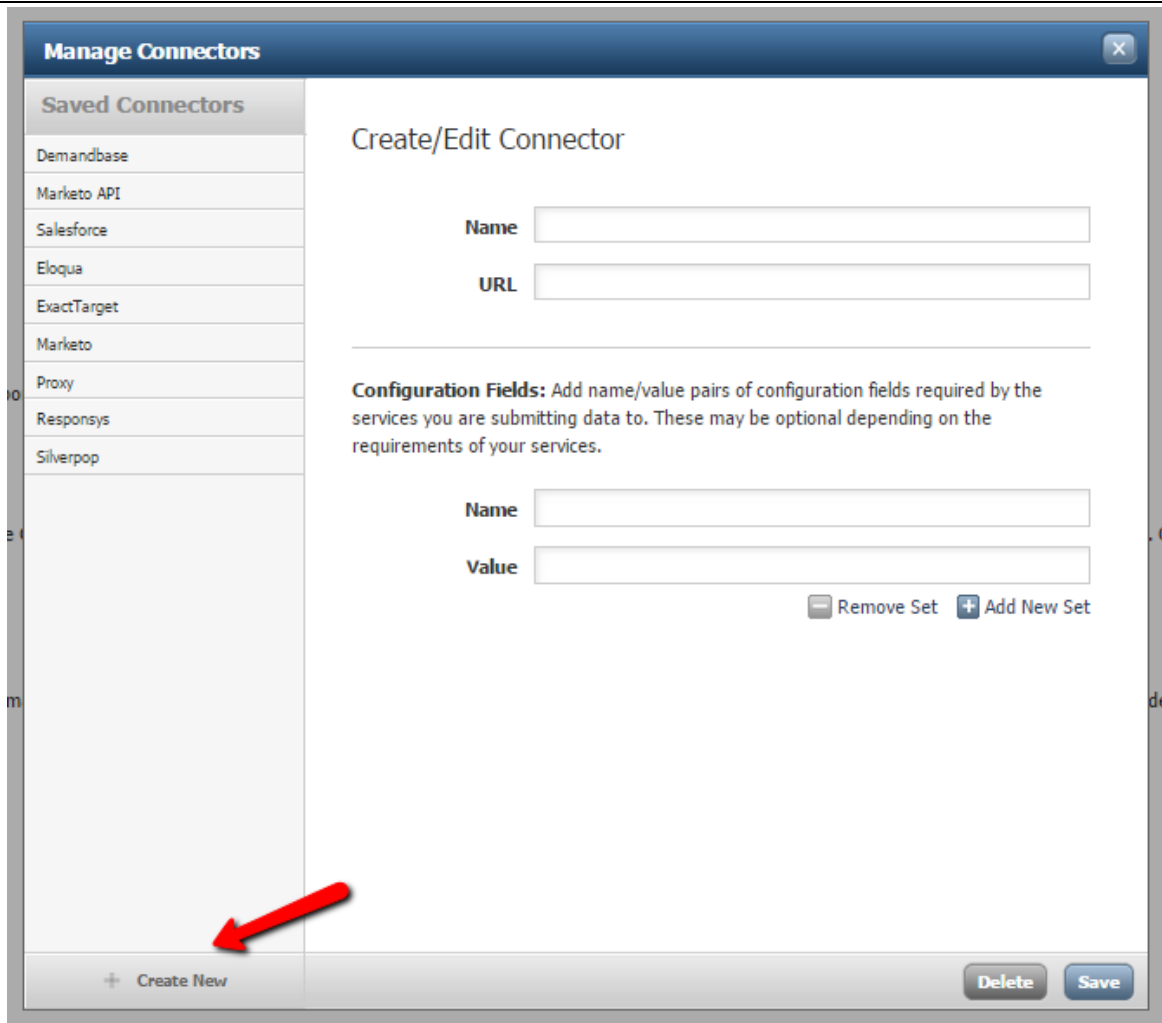
1. Begin by creating a form with a WCO control.
2. Use Crownpeak Platform’s built-in wizard to create a form.



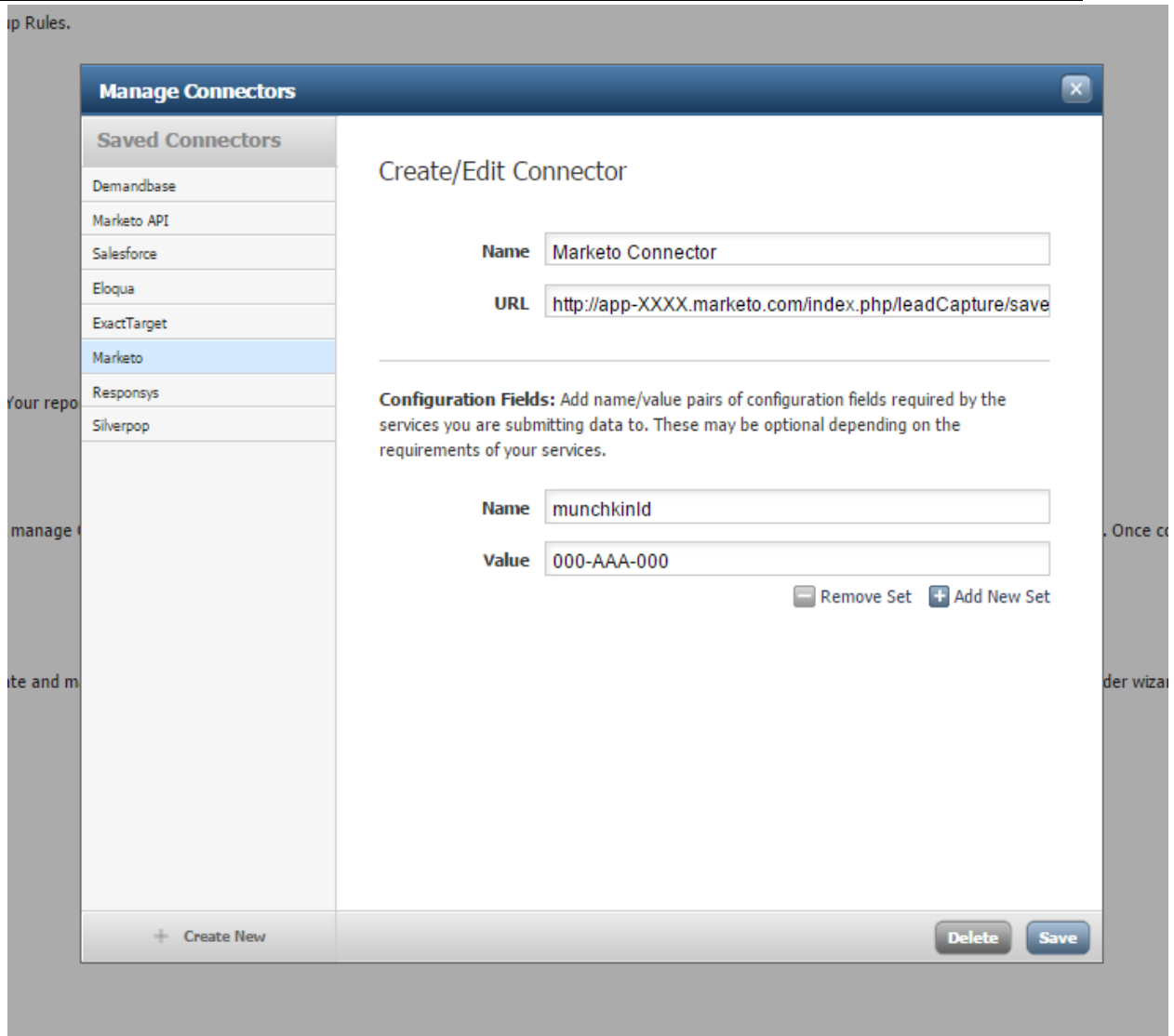
3. Verify that the form created renders properly on the published page.
4. Have the Marketo administrator find a Marketo Form ID. (The Form ID is a variable, so that you can trigger the submission of different forms.)
5. In the Marketo UI, select the form and look at the URL: it should be of the format https://app-x.marketo.com/#FO8B2ZN12. Behind the # sign, look at the number immediately following “FO” to find the Form ID. In this case, the Form ID is 8. In some cases, your first form may be numbered 1001 and count up from there.



6. Have the Marketo Administrator get the Marketo Account ID. In the Marketo UI, the administrator should go to Admin > Munchkin and copy the Munchkin Account ID, which has the format of 000-AAA-000. (You'll need this so that the form is submitted into the correct Marketo instance.)
7. Have the admin determine the POST URL. When in the Marketo user interface, note the domain in the location bar, usually of the format `http://app-x.marketo.com/`. Discard anything after the slash, then append **`index.php/leadCapture/save`** to get the full form POST URL.
 - A. This is case sensitive.
 - B. An example URL would be:
 - a. `http://app-x.marketo.com/index.php/leadCapture/save`
8. When all required Marketo information has been gathered by the Marketo administrator, it can then be entered in the WCO Connectors screen.
9. To create a connector navigate to Web Content Optimizer > Settings > Global Settings > Manage Connectors >
10. Select + Create New



11. Navigate to Web Content Optimizer > Settings > Global Settings > Manage Connectors > {Newly_Created_Marketo_Connector} in order to populate the Configuration Fields.
12. This section accepts key value pairs that are sent along with the submission data to the POST URL entered. In this section the following pair will be entered
 - A. Name - munchkinId
 - B. Value – Marketo Account ID gathered in step 3 in the following format
 - i. 000-AAA-000



13. Decide Which Fields to POST. You can include any Marketo lead field in your form submission. Field names created in a WCO form must match the field names in Marketo to ensure a successful submission.
 - A. A complete list of field names Marketo is expecting can be found in the Marketo admin portal. Go to Admin > Field Management > Export Field Names. Use the "SOAP API Name" column.
14. Please note that field names are case sensitive.
 - A. For example, if you create a field to capture a first name in a WCO form, case must match exactly in order to transfer the information.
 - i. If Marketo is expecting
 - a. First Name
 - i. `<input type="text" name="FirstName" />`
 - ii. Then the WCO field must be
 - a. First Name
 - i. `<input type="text" name="FirstName" />`
 - iii. It will NOT accept
 - a. First Name
 - i. `<input type="text" name="firstName" />`
 15. In addition to the fields you want to submit through the form, there are two mandatory and two recommended fields to place on it.

- A. Mandatory fields to include
 - i. munchkinId
 - a. This field is used for your Munchkin Account ID. This is the value that was inserted in the connector screen.
 - ii. formid
 - b. This field indicates which Marketo form has been submitted.
 - c. `<input type="hidden" name="formid" value="{form_id}" />`
- B. Recommended fields to include
 - i. Email
 - a. This field is used as the primary key for deduplication. If Marketo finds a matching email address in the Marketo database, it will update the existing record, otherwise it will create a new record. If there are multiple matches, it will update the most recently modified record.
 - ii. _mkt_trk
 - a. This field carries cookie information, allowing the tracking of an individual's web page visits. If you have Munchkin on your form page, Munchkin will automatically enter a value in this hidden form field. If not, it can be read from the cookie with the same name and passed to Marketo in this field.

Advanced Crownpeak Platform Layer

Pull: WCO Targeting with Marketo

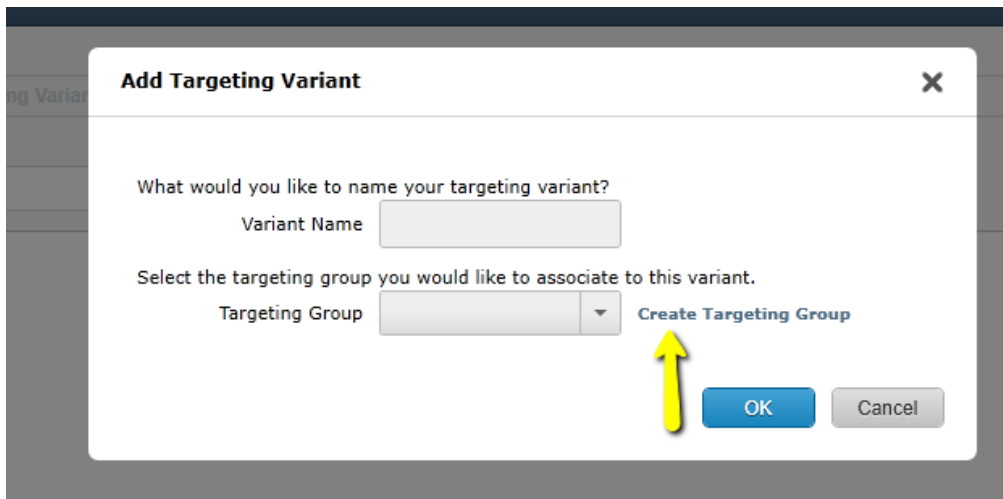
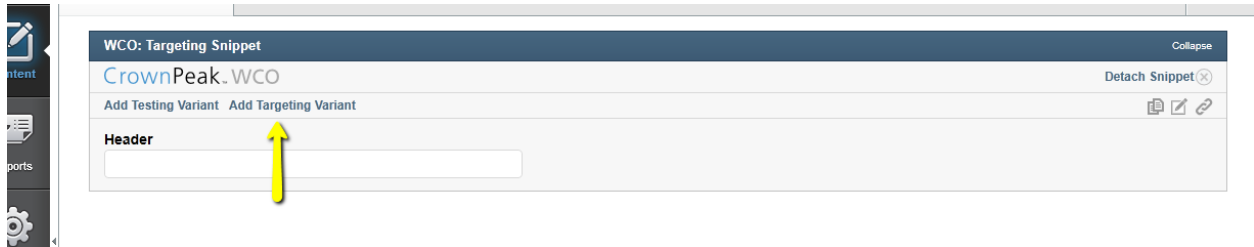
Data stored in the Marketo lead database can be used by WCO to create targeting groups so snippets can be created for personalized web page content.

Follow the steps below to set a WCO target group using data from Marketo via the API connector.

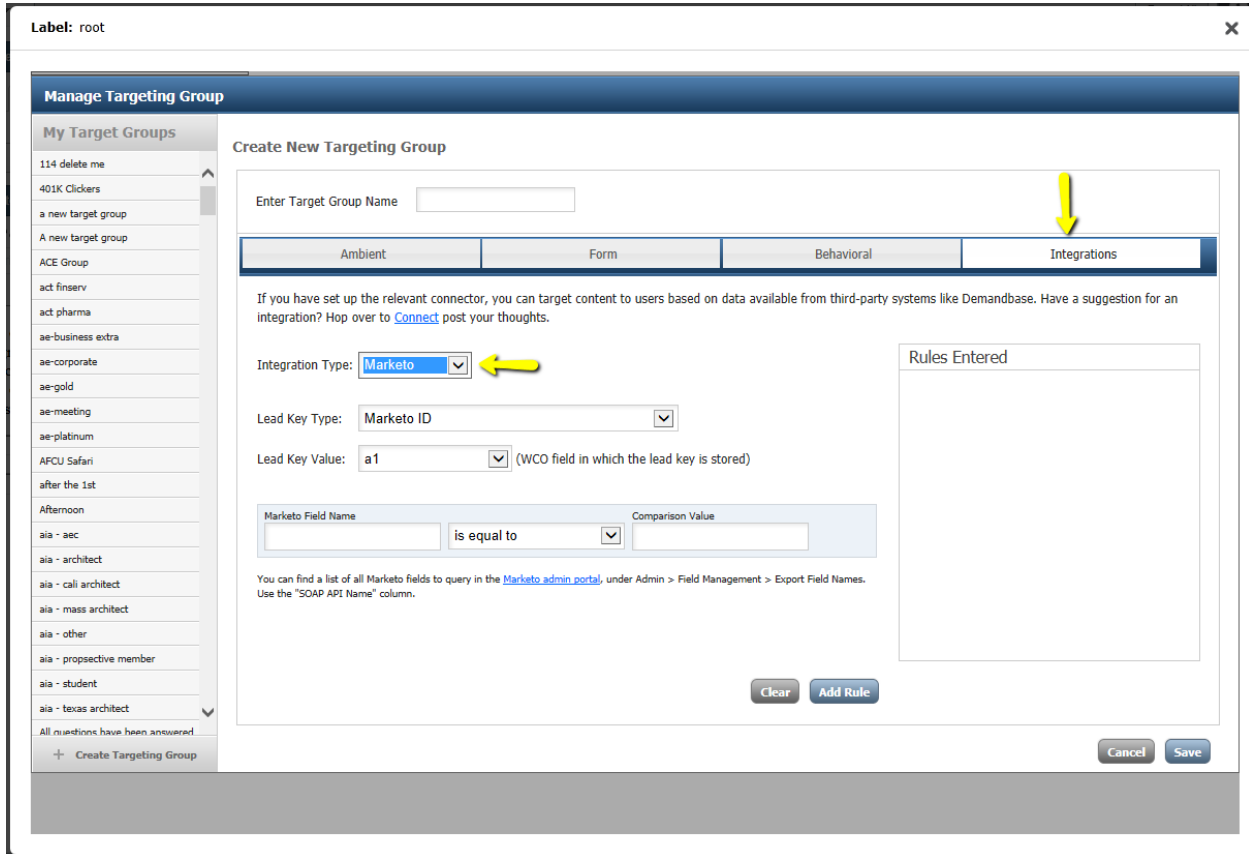
1. Create a snippet for a field with a WCO control applied.



2. After the snippet has been added, create a target group by selecting Add Targeting Variant and following the required steps.



3. As you create the new target group, select the Integrations tab and enter information about the Marketo connector.



4. Create a business rule within the tab. Choose a method for retrieving data from Marketo. The following options are available


- A. Lead Key Type: Key type allows you to specify a field to use in querying a lead in Marketo. Some of the possible keys are listed here.
 - i. IDNUM: The Marketo ID (e.g., a number like “64”)
 - ii. COOKIE: The value generated by the Munchkin JavaScript (e.g., “id:561-HYG-937&token:_mch-marketeto.com-1258067434006-50277”).
 - iii. EMAIL: The email address associated with the lead. (e.g., “rufus@marketo.com”).
 - iv. SFDCLEADID: The lead ID from Salesforce.
 - v. LEADOWNEREMAIL: The email address of the lead owner.
 - vi. SFDACCOUNTID: The account ID from Salesforce.
 - vii. SFDCONTACTID: The contact ID from Salesforce.
 - viii. SFDLEADID: The lead ID from Salesforce.
 - ix. SFDLEADOWNERID: The lead owner ID from Salesforce.
 - x. SFDOPPTYID: The opportunity ID from Salesforce.
- B. Lead Key Value is the WCO field in which the lead key is stored.


Create New Targeting Group


Enter Target Group Name

Ambient	Form	Behavioral
---------	------	------------

If you have set up the relevant connector, you can target content to users based on data available from third-party s integration? Hop over to [Connect](#) post your thoughts.

Integration Type: 

Lead Key Type: 

Lead Key Value: (WCO field in which the lead key is stored) 

5. Choose a method to define how WCO will compare the retrieved data. There are several options for doing this.
 - A. You can find a list of all Marketo fields to query in the [Marketo admin portal](#), under Admin > Field Management > Export Field Names. Use the "SOAP API Name" column.

Marketo Field Name	Comparison Value
<input type="text" value="Title"/>	<input type="text" value="is equal to"/> <input type="text" value="executive"/>

6. Add the business rule you've created and save your changes.

Using the Marketo Crownpeak Platform Integration

Once the configuration is complete, Crownpeak will conduct user training as part of User Acceptance Testing. Crownpeak will also review Marketo in the context of the business process and confirm proper operations for:

- Marketo Connector
- Marketo API Connector

Any issues or additional changes requested will be part of the final configuration tuning.

Once User Acceptance Testing is complete, the configuration process will be complete and ongoing operations will be supported by Crownpeak's Absolute Service team.

Additional Configuration Options

Using Crownpeak Platform connectors, you can also configure a Dashboard and Integrations Tab in right rail. There is more information in the release note.

https://connect.crownpeak.com/products/release_notes/documents_release_notes/release-notes-archive/2015_release_notes/build5906releasenotesandknownissues21815pdf

Notes

Implementation Guidelines

A Marketo project usually takes about eight hours to configure when working from a complete business process specification. Gathering business requirements may take as much as eight hours depending on documentation levels required. User Acceptance Training and tuning the configuration may add 8 hours to an existing UAT or may require up to 16 hours for a stand-alone configuration as: 8 hours of training, 8 hours of support across a 5 day UAT window.

Playbook Notes