LeadMD

The Enterprise Guide to

Marketo

Executive Summary

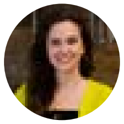
AN IN-DEPTH GUIDE TO BUILDING A BUSINESS CASE FOR AND IMPLEMENTING MARKETO.

Marketo is the best-in-class marketing automation platform for innovative, data-driven B2B marketing teams. Like so many other robust tools, there are various ways to implement the platform, ranging from very simple and fast, to extremely robust and threaded throughout the multi-national, multi-disciplinary expanse of an enterprise organization. This guide was designed for those in the latter category.

The intention of this guide is to provide actionable steps for you and your team to build the business case for marketing automation and then take the steps necessary to ensure a successful rollout. What is "success"? Our definition of a successful Marketo implementation includes:

- Maximizing marketing ROI
- Enabling data-driven decisions
- Enabling better communication between marketing and sales leveraging data
- Enabling better integrated campaigns
- The ability to collect and organize buyer insights across marketing channels
- A trained and confident administrator

When all these elements come together, the business sees incredible value in marketing efficiency and a reduction in wasted spend. Marketo is more than marketing automation and email. When implemented strategically, it is a catalyst of tremendous organizational impact. Is your company ready to join the marketing revolution?



Andrea Lechner-Becker
CMO, LeadMD

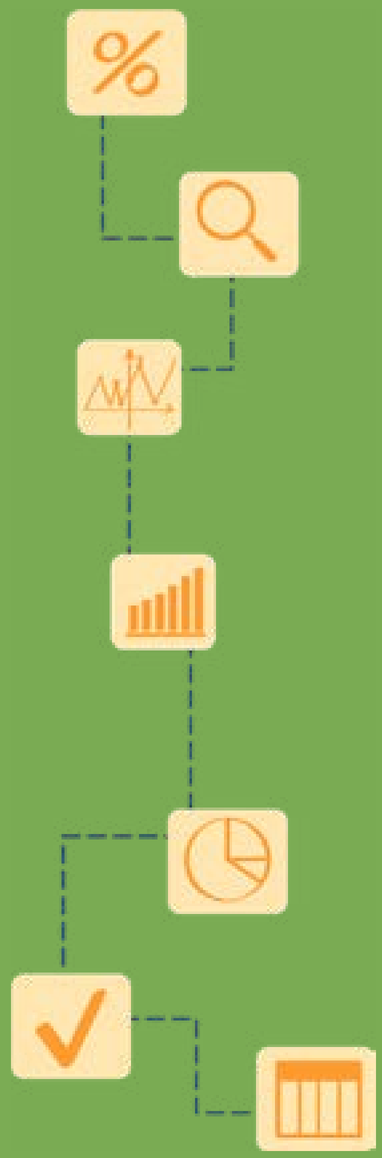
Table of Contents

EXECUTIVE GUIDE

The Enterprise Guide to Marketo

APPENDIX

Additional Material



Introduction

How can enterprise organizations get the most out of Marketo? Having implemented thousands of Marketo instances of various complexity for organizations in a variety of sizes and industries, you can imagine how much we've learned. Said simply, enterprise organizations are more complex—way more complex—than non-enterprise. In this guide, we'll share best practices for the implementation of Marketo, which can also serve as a guide for those looking to overhaul an underperforming Marketo instance as well.

QUICK DEFINITIONS

Enterprise Organizations - International organizations, with typically over 1,000 employees or over $150 million in annual revenue

Business Units - Departments within an organization representing a specific business function, such as accounting, shared services or product-specific teams

MYTH:

Marketo is Easy

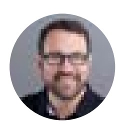
Sure, it's easy to setup an email campaign in Marketo. But, creating an engagement engine in an enterprise takes a very skilled team of cross-functional leaders, including, of course, marketers.

Before you buy Marketo, you should create a plan for how your organization will harness Marketo's possibilities. What organizational objectives will it help you accomplish?

Take the advice of Adobe's Head of Marketo Platform:

I have seen many customers sign on for a Marketo instance and then hit the wall of institutional paralysis. Your revenue organization may need to change the way it is organized, the way its processes flow, and the tools that are used in the processes. I have seen many organizations falter at the start because they are unprepared for the organizational impact that Marketo can have.

Begin your implementation process only once you have agreement to embrace making decisions, and accepting change from your sales, customer success, marketing, and other groups involved in all stages of the customer journey. If you can't get that agreement then consider reaching out to a services partner or Marketo professional services to run a Center of Excellence workshop to help you get that agreement.



Paul Wilson
Adobe's Head of Marketo
Marketo

Framework for Marketo Implementation

We'll use our own delivery process as a framework for walking through a Marketo implementation. This process contains both strategic and tactical elements.

SHAMELESS PLUG

LeadMD

We collaborate with visionary marketing catalysts on technology implementations (like Marketo) and optimizations everyday. If you'd like to partner for another set of eyes, ears and brains to work on impactful projects, email us at **go@leadmd.com**.

STRATEGY / EXECUTION

STAGES	STRATEGY		EXECUTION		
	1 | ASSESS	2 | DESIGN	3 | BUILD	4 | ENABLE	5 | OPTIMIZE
	1 | DISCOVERY	1 | REQUIREMENTS	1 | SETUP	1 | DOCUMENTATION	1 | MEASUREMENT
	2 | ASSESSMENT	2 | SOLUTION	2 | DATA & ASSET MIGRATION	2 | TRAINING & ENABLEMENT	2 | MAINTENANCE & SUPPORT
	3 | RECOMMENDATION	3 | PLANNING	3 | TEST & OPTIMIZE		

NOTE

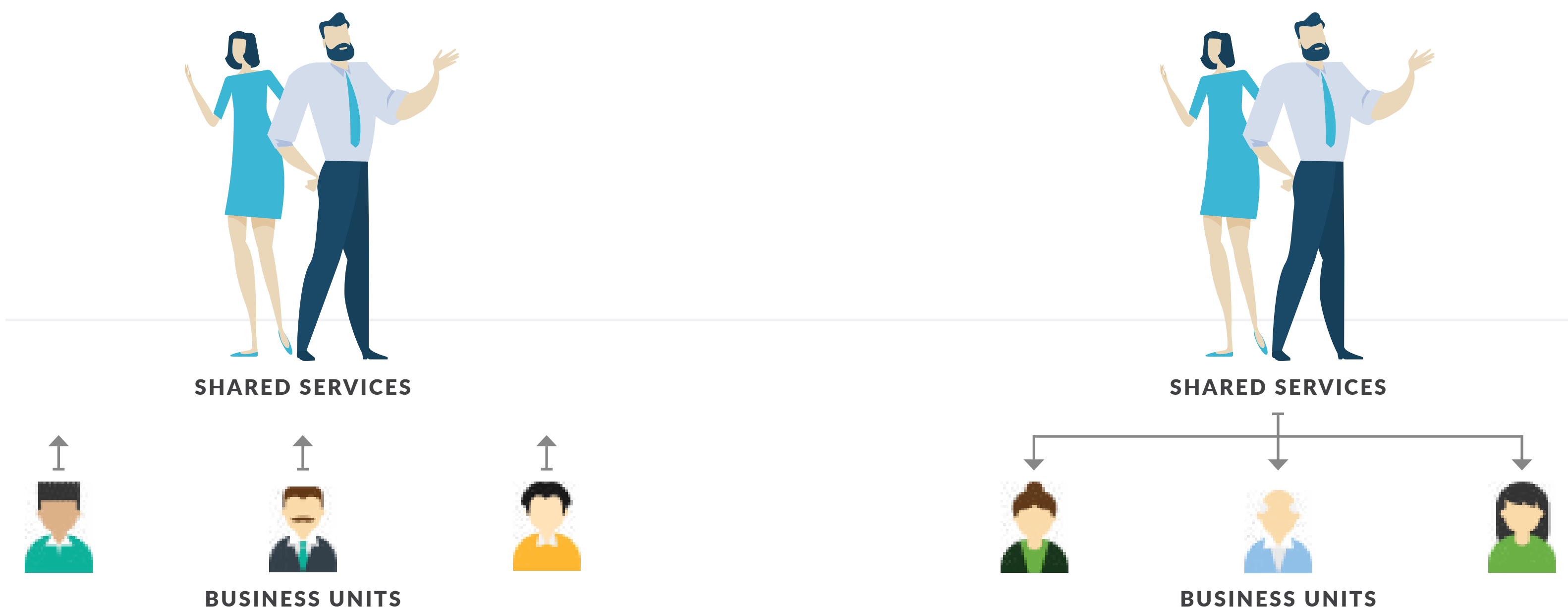
If your current Marketo instance is working against you, chances are your organization rushed planning and governance going into the implementation, leaving you to untangle the web of an unoptimized and potentially poorly planned instance. Use this guide to get back on track!

STEP 1
ASSESS
STAGE 1
Discovery

The need for any technology should sprout from a business objective or current pain. Broadly speaking, the need comes from either the top down or the bottom up.

BOTTOM UP

TOP DOWN



Things you might be hearing from each area...

SHARED SERVICES

- We need to reduce costs via technology consolidation
- We need to provide a scalable marketing automation solution
- We need to provide scale around strategic and tactical best practices to reduce waste and error

BUSINESS UNITS

- We need to create more engaging marketing campaigns
- We need better alignment and visibility between marketing and sales touchpoints
- We need training on best practices

WORKSHEET

Gather and Organize Your Organization's Objectives

Before you outline your objectives for this project, take the time to start with your overall organization objectives. Tying the objectives of the organization to a marketing automation implementation helps with the next step of achieving buy-in from key stakeholders.

1. What are the company's growth goals?

2. How is the company approaching growth (i.e. market penetration, market expansion, market exposure, etc.)?

3. How much growth is expected from new customers versus existing customers?

4. What is the competitive landscape and how's your positioning?

5. What's the state of the company's product? Are there heavy R&D investments to consider?

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're in Shared Services Part 1 of

You're used to balancing the needs of a diverse set of users. We recommend you start broadly and then prioritize business unit specifics by level of impact.

1 What are your departmental goals for the quarter?

2 What are your departmental goals for the year?

3 What questions do BUs consistently ask?

4 What trends can you determine about these asks? For example: stage of tenure (new employee training), new product launch, new manager, new channel focus (social monitoring, advocate program, etc)

5 Quantify your spend for these types of questions in time or hard dollars.

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're in Shared Services Part 2 of 4

6 What issues arise due to lack of scale and automation?

7 Quantify what these issues cost the organization in time or hard dollars.

8 List and rank BUs in terms of shared services support consumption:

Business Units	1 - Very Little	2	3	4	5 - Very Heavy

9 Estimate the savings (in time or hard dollars) of implementing a tool to scale.

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're in Shared Services Part 3 of 4

10 Align BUs to any marketing automation platforms they currently use outside of shared services.

11 How specifically would each BU benefit?

12 What are the risks in getting buy-in at each BU?

PEOPLE

PROCESS

DATA

EXISTING TECHNOLOGY

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're in Shared Services Part 4 of 4

12 Create a Catalyst Committee. Who can help move a project like this forward?

BU LEADERSHIP

SHARED SERVICES LEADERSHIP

FINAL DECISION-MAKER

INFLUENCER

BLOCKERS

WHO'S YOUR CHEAT?

(Think about outside partners who can validate your recommendations)

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're a Business Unit Part 1 of 2

1. What are your departmental goals for the quarter?

2. What are your departmental goals for the year?

3. What are your individual goals for the quarter and year?

4. What's the hardest part of your job and why?

5. What's your biggest complaint about shared services? What would improve it?

6. How happy are you with target response to your campaigns? What would improve it?

ADDITIONAL NOTES:

QUESTIONNAIRE

Questions to Ask if You're a Business Unit Part 2 of 2

7 What tactics could you immediately identify as gaining profitability through scale?

8 Estimate how much savings (in time or hard dollars) an automation tool could provide.

9 Create a Catalyst Committee. Who can help move a project like this forward?

BU LEADERSHIP

SHARED SERVICES LEADERSHIP

FINAL DECISION-MAKER

INFLUENCER

BLOCKERS

WHO'S YOUR CHEAT?

(Think about outside partners who can validate your recommendations)

ADDITIONAL NOTES:

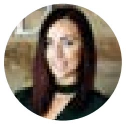
Assessment

Align Stakeholders

The last question, whether your role is in shared services or within a BU, is about creating a "Catalyst Committee". Getting things done within an enterprise environment can be challenging. With big implications for regulatory compliance through budgeting, getting a system implemented across the organization (especially one that will integrate at various points) will require diligence and a tight team of driven people to get it done right.

That's why, your next step after determining the goals and beginning to build the business case is to focus on the stakeholders who will help you accomplish this large feat. An effective way to align with key stakeholders is to create a project team, led by a project manager, to focus on the implementation.

Project Management Tips and Tricks



Stacy Smith
Senior Project Manager

Your project team should have these common characteristics to ensure it is consistently making progress towards an end goal.

Long Term Objectives
Ensure everyone is aligned on what the organization is trying to achieve and how they can help.

Short Term Objectives
These task force/project teams typically do not have ongoing functions, but rather short-term goals that are under tight time constraints. Creating a series of short and long-term goals will keep buy-in high and the project on track.

Define Roles
Each person on the project team understands his or her role and how they can help the team succeed.

Diversity of Skills
A well-rounded solution requires different skillsets. The project team shouldn't be comprised of only marketing or only decision makers. A mix of system admins, marketers, sales, or others impacted by this implementation should be included.

Keep it Lean
Although a mix of skillsets is needed, keep the team as lean as possible. A range of stakeholders can be consulted by the project team, but not everyone who is consulted should be on the team.

Budget and Timeline
Not all project team members need to be aware of the budget, but they do need to be aware of the timeline. Outline the milestones in the projects and their anticipated due date. Ensure that someone is keeping track of the project budget.

WORKSHEET

Assessing Objectives

Once your project team has been established, but before your first meeting, ask each relevant member to spend time answering the following questions:

1. What do you hope to accomplish with Marketo?
2. What technology platforms do you use today? What is each platform's purpose?
3. What processes need to be preserved?
4. What marketing channels do you use?
5. How do you manage your lead flow with sales?
6. What metrics are important for you to measure? Do you use any additional reporting layer such as Tableau or Domo?

   Reporting Note!

7. What people on your team do you hope have access to Marketo? What is your preferred workflow in the system? (For example, some business units may want shared services to run all of their campaigns whereas some will want to be hands-on with the platform).
8. Are there other ways this purchase affects you that you'd like to bring up?

Finally, ask them to create user stories. User stories are development tasks often expressed as "persona + need + purpose." Stories are a few sentences in simple language that outline a desired outcome. They provide critical context for the task force. See examples to the right.

Use Stories Examples

As the CMO of the enterprise business unit, I want to measure my marketing impact so that I can make smarter decisions about my marketing investments.

As a marketing operations manager within shared services, I want to deploy marketing campaigns for the business units so that they can reach their revenue goals.

REPORTING NOTE

Remember this metrics piece. It will be a core thread to weave throughout the project, eventually culminating in the "Measurement" stage which begins on *page 48*.

STAGE 3

Recommendation

1 | ASSESS
1 | DISCOVERY
2 | ASSESSMENT
3 | RECOMMENDATION

Make Sense of the Data You Gathered

In this stage, your goal is to aggregate the information you gathered to prioritize your efforts into a plan. This is one of those concepts that sounds easy when you read it, but in reality, requires a significant time investment.

There is no way to possibly account for every situation you will encounter here, but here are some critical outputs before you move on to the execution phase.

QUESTIONNAIRE

Talent Assessment

In addition to making sense of the data you gathered, it's also time to start thinking about how you will resource this new system. Will the BUs have access to Marketo or will it be administered through shared services? Use this worksheet to begin your thought process.

1. What existing skillsets are present in your organization?

2. What gaps do you have?

3. How might marketing resources be expected to work together in Marketo?

4. What vendors do divisions work with and how will those relationships be affected?

ADDITIONAL NOTES:

Process Recommendation

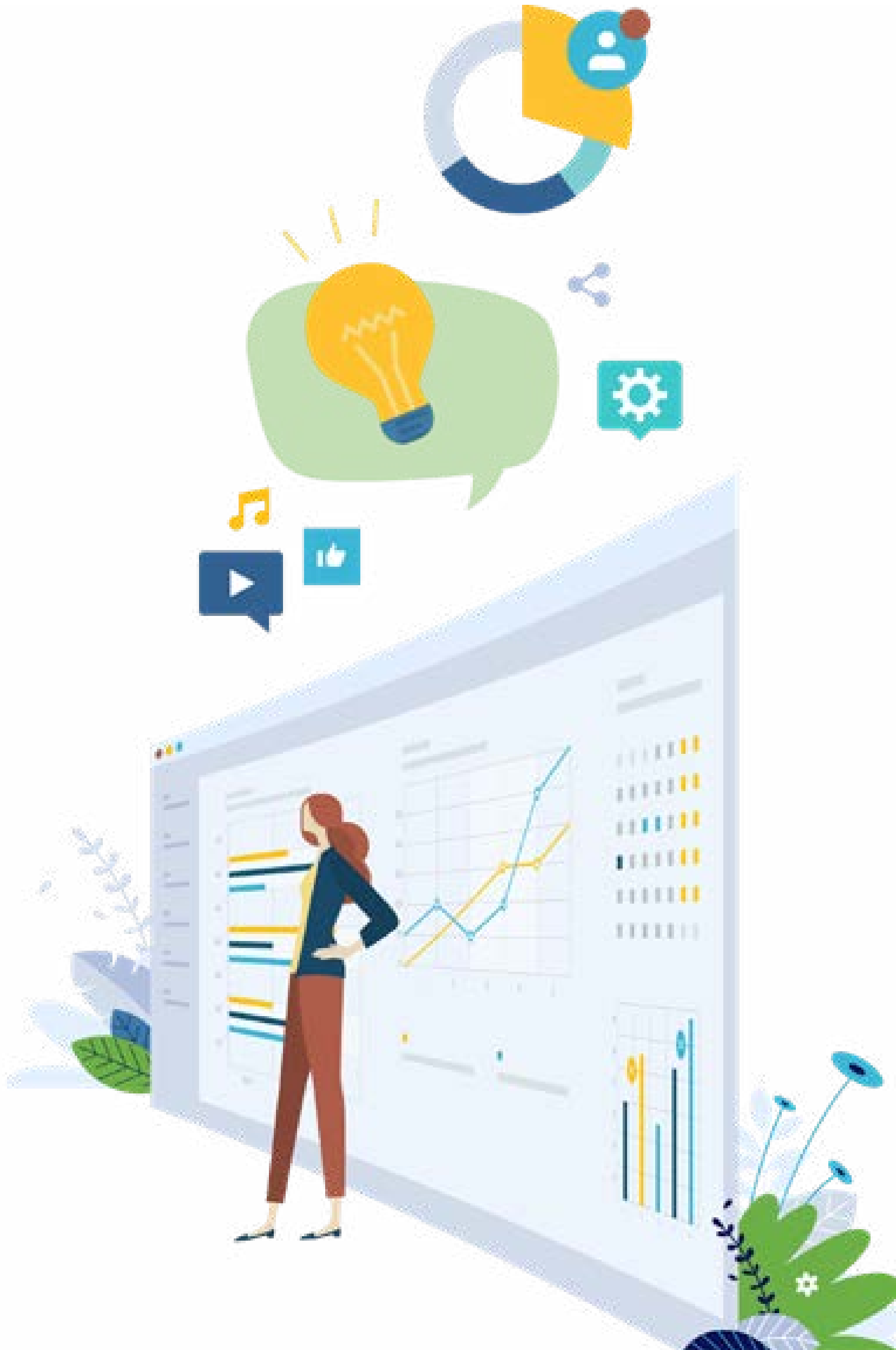
During your process discovery and assessment, you'll likely find different lead flow processes in different divisions. Sometimes only nomenclature is different, but other times, the processes are completely different. In the end, you'll have two options: maintain the separate processes *or* combine them. This is less about deciding explicitly how the process will work, but rather an exercise to determine the feasibility of combining processes. Remember that you're only aiming to provide a recommendation here, not yet design the solution. If you're curious to see an example of a process solution in action, see *page 26*.

Separate processes that remain separate

In a recent enterprise implementation, one division was highly focused on demand generation. Its core audience was small to medium sized businesses and its buying committee was made up of one person – the business owner. In another division, the go to market motion was account-centric. The ideal customer profile was a large enterprise with more potential to cross and upsell clients than land new logos. These are two very different motions, and the way they go to market must be reflected in Marketo. Because there was a very clear division, this client opted to create separate lead partitions and workspaces within Marketo. Each had its own lifecycle and revenue cycle model.

Separate processes that can be combined

In another implementation, we found that each division's go to market motion was similar enough to combine into one process (lead lifecycle) within Marketo.



	Systems Architecture Map	Audience Analysis	Data Governance Assessment
Why It's Important	It's all about the data nitty gritty. Where is it currently? And what's the future vision?	Are separate BUs selling to the same people?	Who owns specific data points at various stages in the process?
Discovery Example	We currently send emails from three separate tools and must consolidate to one.	Given our diverse product lines, some BUs will share contacts.	Data management is not structured or policed, resulting in data loss and inaccuracy.
Assessment Example	SendGrid deploys operational emails, fed by an integration between a proprietary product database and SendGrid. Pardot deploys B2B communications, but the data it receives (and returns) to Salesforce is subpar. HubSpot deploys B2C communications from list uploads maintained in various inboxes and desktops.	BU1 sells to the marketing department in any given organization. BU2 sells to the sales department, with heavy marketing leadership influence. Both require procurement. BU3 sells only to small businesses with a single POC and decision maker. Due to SFDC visibility rules, none of the sales team can see any overlapping contacts and therefore create many duplicate contacts.	Data vendors are automatically updating SFDC via their integrations, however, some are updating their system fields (DiscoverOrg) while others are updating the standard fields. Sales reps have full authority to update all fields on leads, contacts and accounts.
Recommendation Example	Due to the custom integration between SendGrid and the product database, operational emails should remain in the platform, as the investment to transition would not hold value (investment to benefit). The other touchpoints should transition to Marketo and be fed by Salesforce data, aided by a robust list import management process for all lists (B2B & B2C).	Due to the dynamic and collaborative selling process, SFDC visibility should be broadened and duplicates merged.	Recommend a full field by field, stage by stage, definition of read, write, delete, edit permissions and a remapping of data vendor updates.

DESIGN | Requirements

Determining Users Expectations

Though it doesn't feel like it, gathering the information is the easy part. In the design phase, your goal is to make sense of all of the data gathered to create an implementation plan. Depending on the complexity of your enterprise, this could be a multi-year plan. With enterprise organizations, the design may require additional Marketo instances, the purchase of workspaces or partitions, custom objects, middle-ware or a combination of the above.

Once you have all the discovery, assessment and recommendation collected, it's time to organize them in to requirements. If you're thinking, "Sounds like a lot of what we did in the "Assess" phase", you'd be absolutely right! You can use this framework to collect the assessment pieces as well. You'll see the format we suggest has room for all the user stories you should already have. And so, in this step you can either plug them right in, or you'll need to hunker down and create them now.

Three Rules for Requirements Gathering

1. NEVER assume. Really. Ask a lot of questions.
2. Requirements must be SMART (specific, measurable, agreed upon, realistic and time-based)

   Reporting Note!

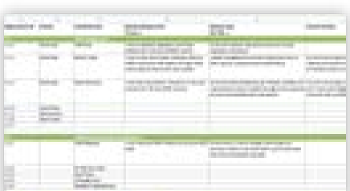
3. Avoid talking technology or solutions until the requirements are fully documented. Make requirements platform agnostic, even if you're secretly trying to get Marketo purchased!

Four Key Questions to Get at the Heart of a Requirement

1. What is the purpose? Focus on the problem, not the solution.
2. What is the goal?
   Goals in business are typically monetary. Even compliance, like GDPR, ultimately boils down to not getting fined. Treat requirements gathering like early California-bound gold diggers, dig until you find the money.
3. Who suffers most (and therefore would benefit most) from this problem?
4. How will you know if the solution "worked"?

   NOTE: *Quantifying the success metric, or outcome, is equally as important as quantifying the problem.*

For our full requirements document, check it out here:
Full document requirements



REPORTING NOTE

These SMART elements will help you in the "Measurement" stage which begins on *page 48*.

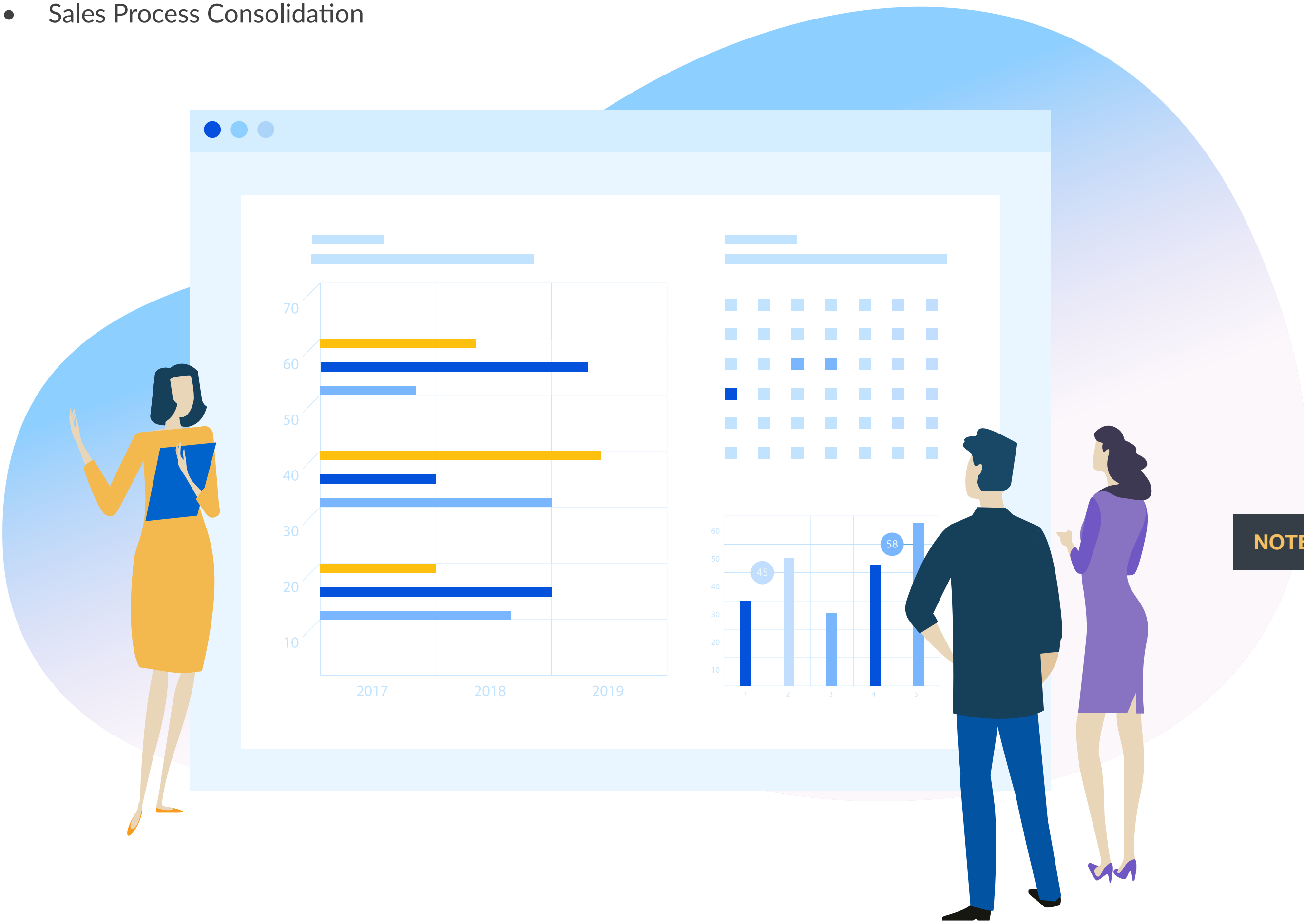
STEP 2 | STAGE 2

DESIGN | Solutions

At this stage, you'll start to design solutions for all the requirements you've collected throughout the rest of the process. No matter how complex your implementation, you should aim to make decisions now about how your Marketo instance will be architected and managed. There are a few key things you will focus on at this stage:

- Data Flow Mapping
- Field Mapping & Data Dictionary
- Sales Process Consolidation

It's critical that you assign a Marketo admin to govern data flows, troubleshoot integration errors and maintain a clean database. This person should have a deep understanding of marketing operations and a solid understanding of the division's business goals.



NOTE

We'll be referencing workspaces and lead partitions throughout the remaining sections. For more information on these core elements of Marketo, please see the *Appendix*.

Field Mapping, Data Dictionary

Field mapping is a detailed document that shows how fields in one system map to another system. Marketo and CRMs like Salesforce have out of the box mapping, with opportunities for customization. Decide what fields should come from external databases and into Marketo, what fields live in Marketo only, and how data flows between fields. For example, does a bi-directional sync exist?

Marketo Field	Field Type	SFDC Mapping 1	SFDC Mapping 1 Object	SFDC Mapping 1 Field Type	Relationship
Acquisition Date	datetime	mkto71_Acquisition_Date_c	Contact	datetime	Marketo -> SFDC
Acquisition Program	reference	mkto2_Acquisition_Program_id_c	Contact	string	Marketo -> SFDC
Acquisition Program Name	string	mkto71_Acquisition_Program_c	Contact	string	Marketo -> SFDC
Add to Marketo Campaign	string	mkto_si_Add_to_Marketo_Campaign_c	Contact	string	Marketo <- SFDC
Address	text	Mailingstreet	Contact	textarea	Marketo <-> SFDC
Annual Revenue	currency	AnnualRevenue	Account	currency	Marketo <- SFDC
Application	string	Application_c	Contact	picklist	Marketo <- SFDC
Assigned Parking	boolean	g_Assigned_Parking_c	Contact	boolean	Marketo <-> SFDC
Billing Address	text	BillingStreet	Account	textarea	Marketo <- SFDC
Billing City	string	BillingCity	Account	string	Marketo <- SFDC
Billing Country	string	BillingCountry	Account	string	Marketo <- SFDC
Billing Postal Code	string	BillingPostalCode	Account	string	Marketo <- SFDC

Marketo Data Flow Map

Here is a basic data flow map showing how one enterprise planned for its Marketo implementation. This client started with the Marketo to Salesforce integration, focusing mostly on how B2B data would get input into Marketo. Though the divisions essentially acted as separate companies (they even had different logos) but shared leads and contacts, they flowed every lead into a default partition that everyone shared and used fields to denote which divisions the lead was interested in, almost like a subscription center. B2C data was prioritized after B2B, but it was planned to be housed in a separate lead partition and workspace since consumer data could not be shared with B2B teams. Because there was a need for a separate partition, the team had to solution for instances where a B2B lead would come in through the consumer side and vice versa.

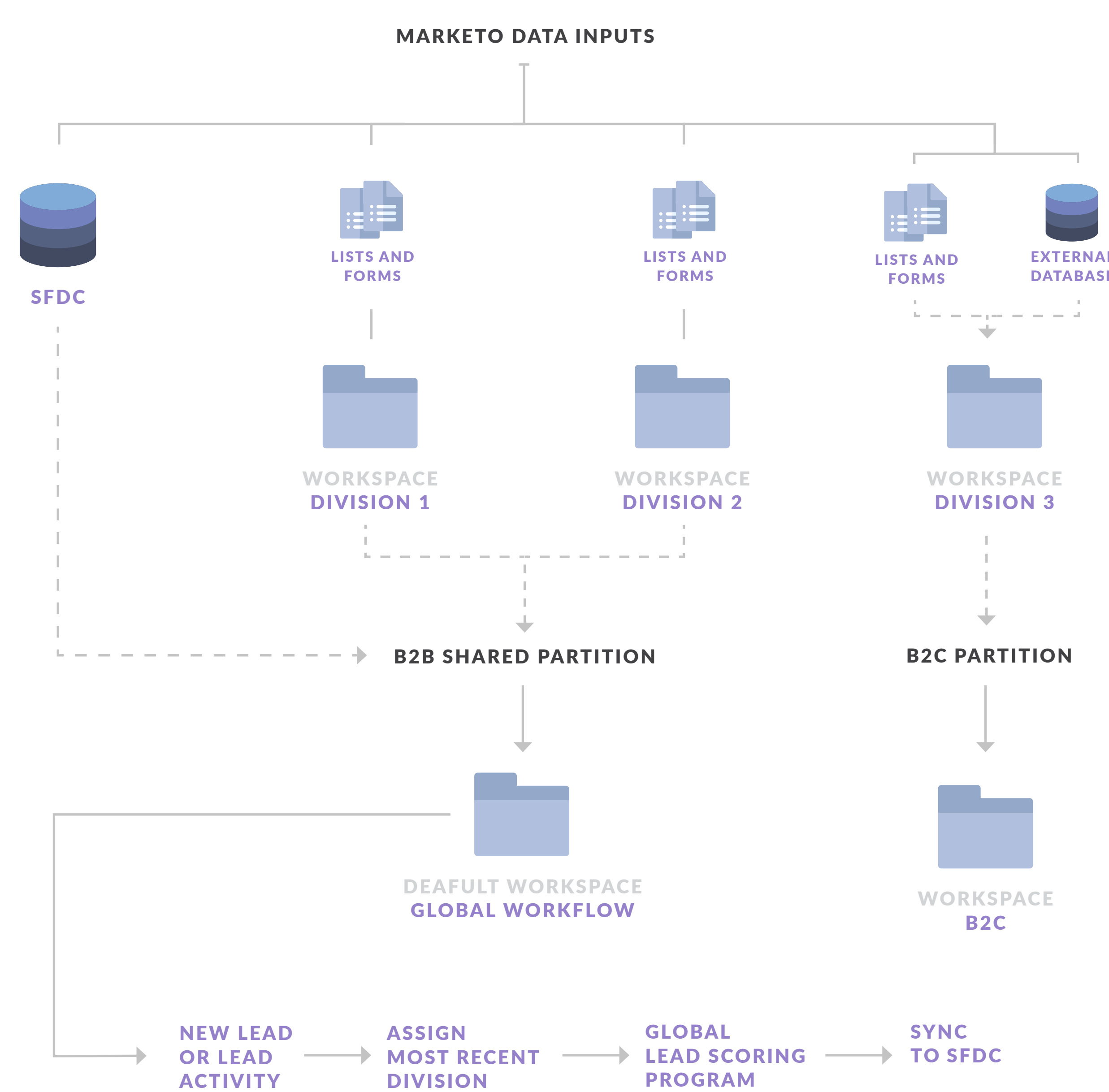
Global Operational Program

At a minimum, if divisions share leads but follow different sales processes, you should have a global operational program inside of your default workspace to manage incoming leads or updates to leads.

NOTE

Whenever possible, LeadMD recommends having one default lead partition where all of the contacts live, and one default workspace where operational items are managed.

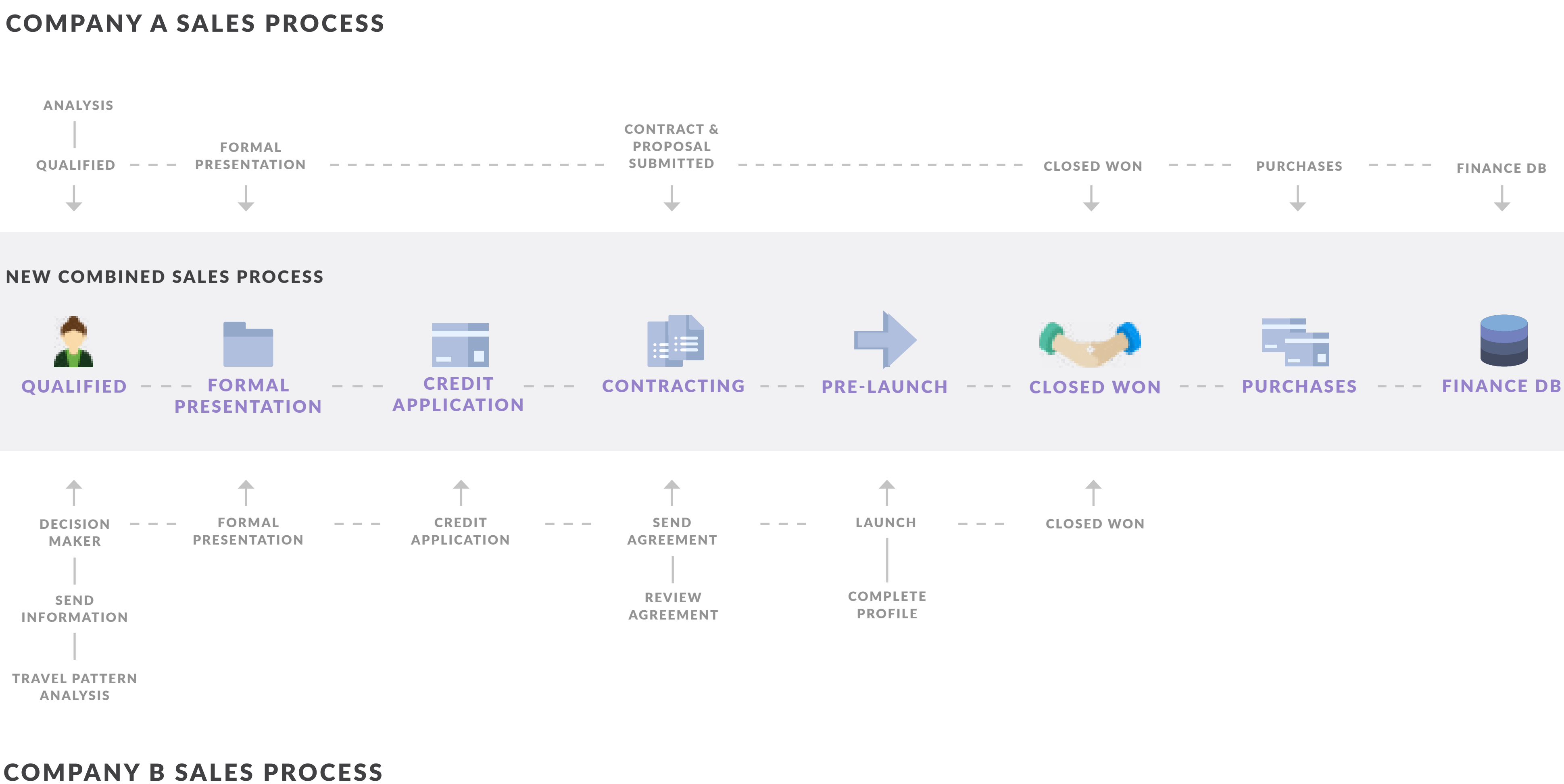
EXAMPLE | *Marketo Data Flow Map*



Sales Process

When multiple divisions occupy the same Marketo instance and follow different sales processes, it may be necessary to merge them into one shared process. Once the global workflows have been run, each division's lead lifecycle can react. In some cases, multiple sales processes can be consolidated into one lead lifecycle. We worked with an enterprise client in the auto industry who acquired another company. Though they wanted to maintain separate branding at the time, the backend sales processes had already merged, so one process for managing lead flow was created. The image below shows how two separate business processes were combined into one.

EXAMPLE	*Lead Lifecycle Sales Process*



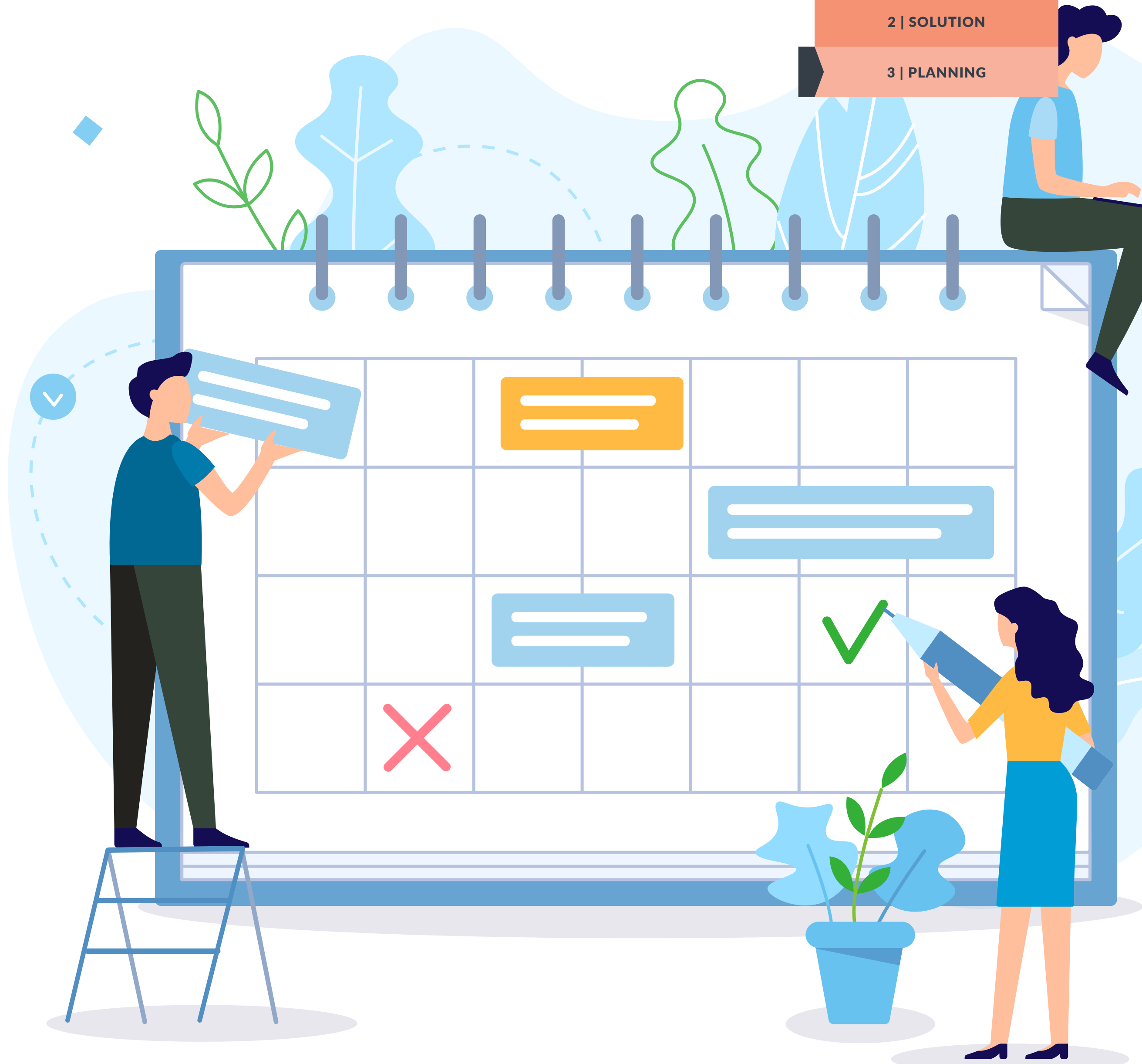
DESIGN | Planning

Implementation Timeline

With all the information you collected, it's time to outline key milestones for your implementation. The roles and responsibilities get translated to users and roles. User stories get explicitly aligned tasks. All this establishes the detail for the next phase, "Build".

Four Keys to a Successful Execution Phase:

1. Clear roles and responsibilities identified.
2. Detailed timeline and project management, with the project team meeting regularly for status updates and dependency management.
3. Detailed documentation of decisions made during execution
4. Detailed user acceptance testing (UAT). Each use case should have a test that gets accepted by the end user.



WORKSHEET

Create an Implementation Timeline

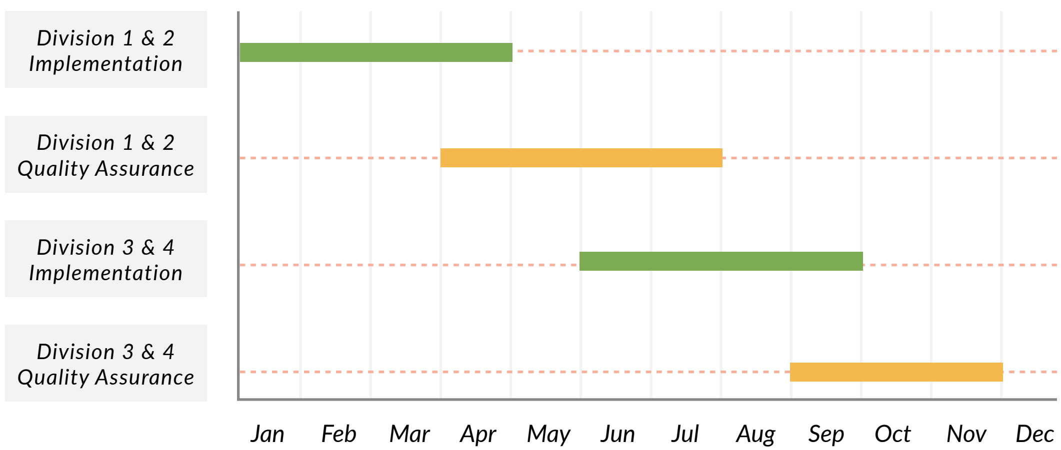
1 Which divisions will you onboard first?

2 Who are your stakeholders involved? Note: The stakeholders may change from the initial project team.

NOTE

In the assessment phase, you may have had broad representation, meaning, a person or two from each division. Now, you'll have to create a deeper project team for each division that you onboard. The project manager and Marketo admin/governance team should remain consistent throughout the entire implementation.

Your high-level Gantt chart may be as basic as this, with more detailed project plans for each implementation phase.



ADDITIONAL NOTES:

BUILD | Setup

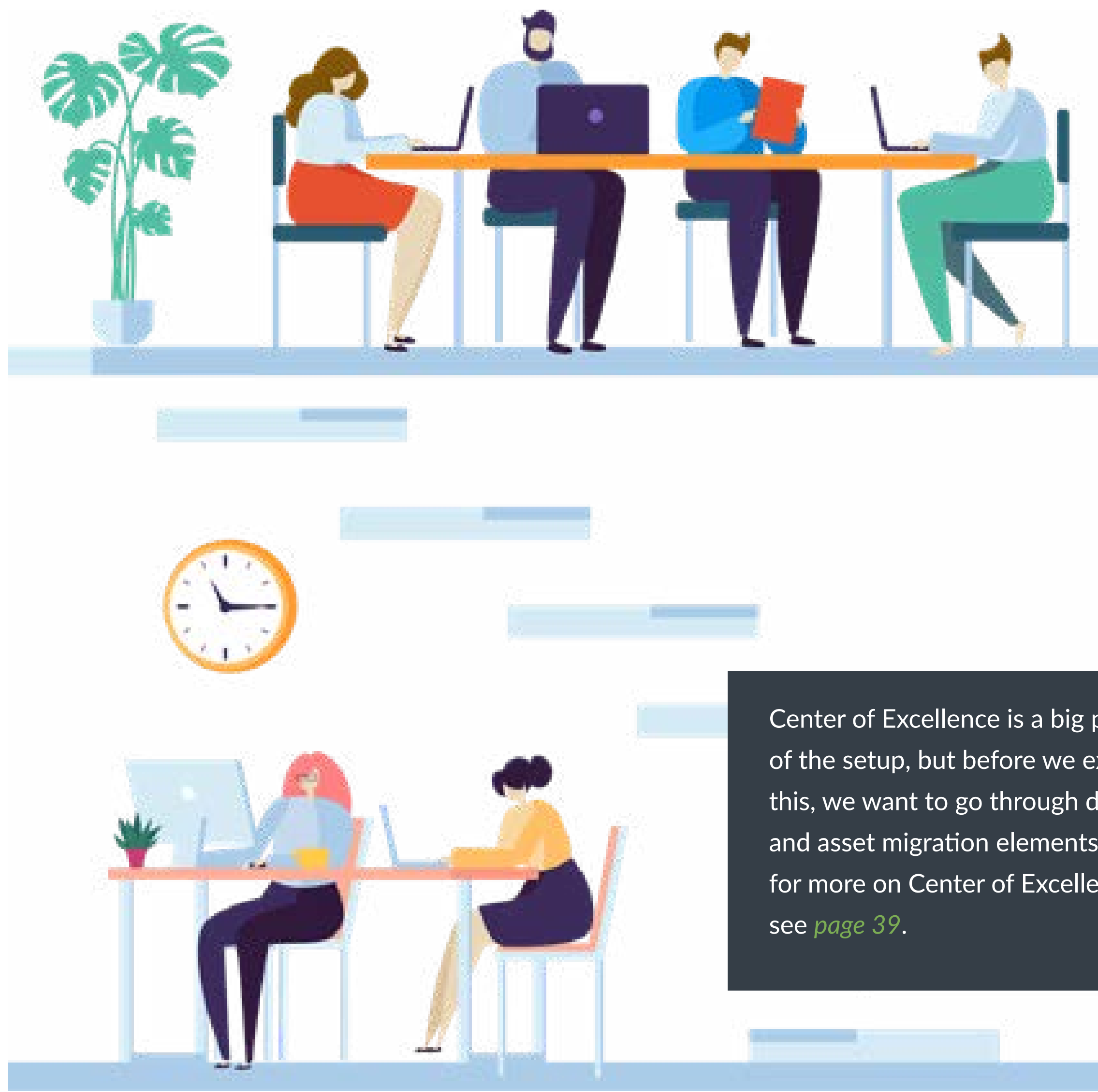
Marketo Data and Architecture Recommendations

In this chapter, we focus on key Marketo features that will help you make decisions on how to architect your Marketo instance. Here are some ways that we suggest you enable your team:

1. Include the right stakeholders and work with them to define user stories.
2. Ensure you have a solid understanding of where data is stored and what systems are being used today
3. Documentation on how data is shared across business units
4. And of course, the right talent to guide you in your decision making and then to maintain what you've built once the implementation is done. When it comes to architecture, you want someone who intimately understands Marketo's architecture, as well as some of its flexibility and limitations.

Marketo has a slew of information about how to setup your instance. We aren't attempting to reinvent these areas, and their live information will be far better to reference long term. For those details of Marketo settings, see here: *https://docs.marketo.com/display/public/DOCS/Settings*

Instead of all the nitty gritty, we're focusing on the areas where we see enterprises struggle the most.



Center of Excellence is a big portion of the setup, but before we explore this, we want to go through data and asset migration elements. So, for more on Center of Excellence, see *page 39*.

Flat Database Structure

Marketo is a relatively flat database with one main object – the person. Meaning that the database is structured around people and the attributes related to that person. Imagine an excel worksheet where each row represented a person and each column represents an attribute related to that person, as in Figure 1 below.

Relational Database Structure

By contrast, a relational database (like Salesforce) uses many tables of information that relate to each other through special key fields. For example, in Salesforce, there are objects that contain information about people and different objects that contain information about accounts. Information about the person and the account are stored in two separate tables, linked together through a key ID. In the Figure 2 example below, the key ID is Account ID.

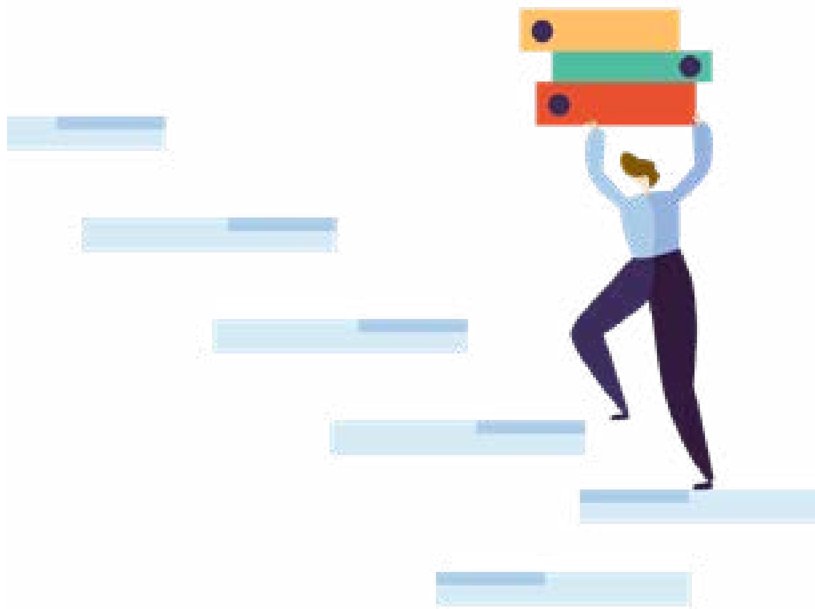


Figure 1: Flat contact table contains information about the person

First Name	Last Name	Email Address	Job Title	Company
John	Smith	jsmith@example.com	CMO	Example LLC
Jane	Williams	jwilliams@example.com	Marketing	Example S-Corp

Figure 2: Contact and account tables contains information about the contact, which links to the account table via an ID

First Name	Last Name	Email Address	Job Title	Account
John	Smith	jsmith@example.com	CMO	123
Jane	Williams	jwilliams@example.com	Marketing	546

Account ID	Account Name	Account Owner	Revenue	No. Employees
123	Example LLC	Sally Johnson	$14,500,100	65,000

In relational databases, like most CRMs, we know that John is a contact at account ID 123. If we go to our account table and look up account ID 123, we see the account is “Example LLC,” Sally Johnson is the account owner and other demographics about the organization.

Because Marketo is flat (natively its just the person table), the information from the account would be flatted onto the same record as the person’s attributes.

In our experience, the majority of use cases aren’t affected by this limitation. However, often times enterprise organizations have situations where they want to build a one to many relationship inside of Marketo. This happens a lot when the enterprise has consumer information in Marketo, but it’s also common in B2B.

For Example

Let’s imagine a higher ED scenario. One student could register for multiple classes. In a relational database, a student could have multiple classes associated with his record. In Marketo’s standard environment, we would have to flatten each course onto the student’s record. This simply isn’t scalable as the number of classes and attributes related to those classes continue to grow. By the time the student graduates, there would be more than 40 classes with attributes describing the class.

In the below example, you can see how unruly such a methodology would become. It is also extremely taxing on the database. Say you change data values in the future for the classes. For example, "History" becomes more granular and the data changes to "American History" and "European History". These data values would need to be updated across all records, which would be a tax on the database to update. If the value only changes on a single record for the class, and all the records associated it to "inherit" that change, it's far more scalable.

First Name	Last Name	Student ID	Class 1	Class 1 Status	Class 2	Class 2 Status
John	Smith	123456789	History	Registered	English	Complete

Custom Objects

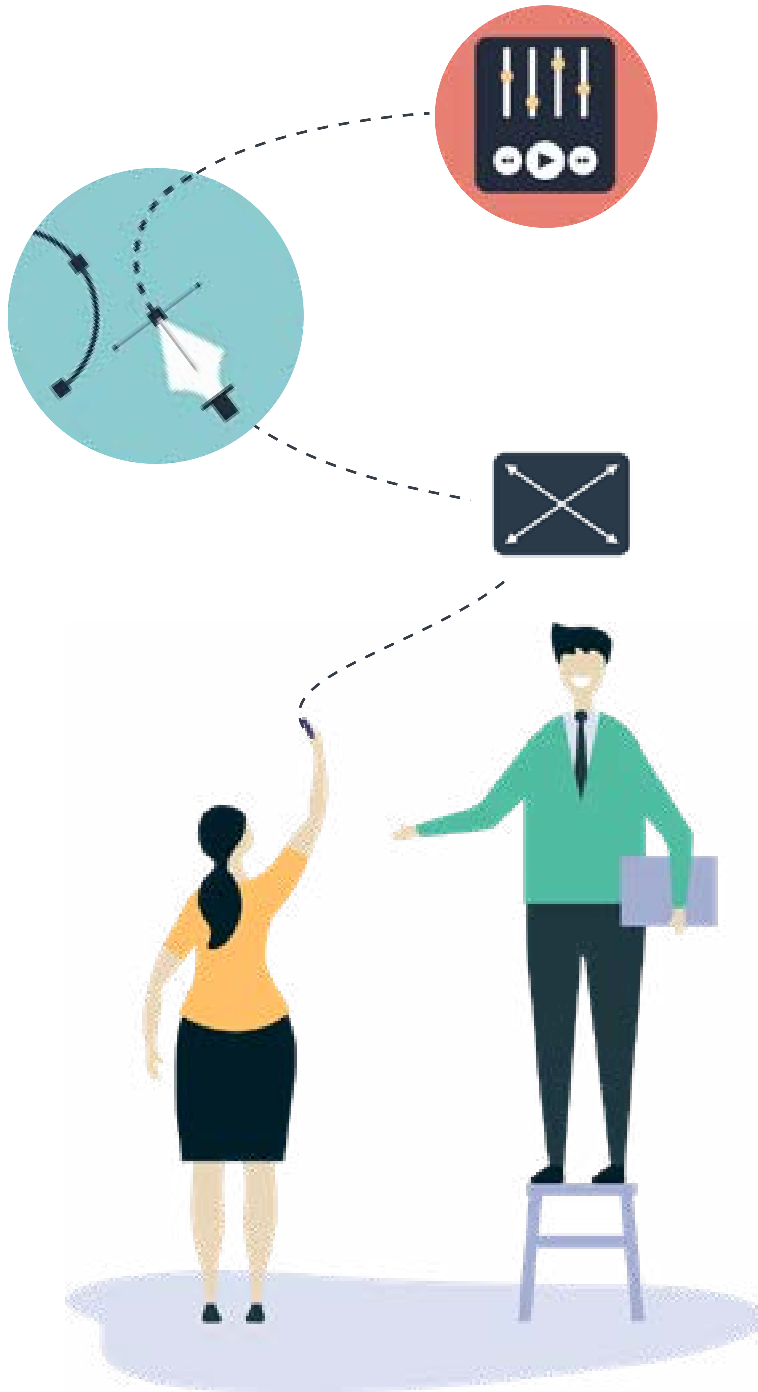
To help end users with the use case above, Marketo offers custom objects. Marketo's custom objects allow for the creation of one to many relationships between your Marketo person records and the custom object records. When a Marketo custom object is successfully provisioned, you can:

1. Create/read/update/delete records in the custom object via Marketo SOAP API
2. Use Smart List triggers when new records are added to the custom object
3. Use the custom object data as a filter in smart lists
4. Use the custom object data in email using Marketo email scripting

If you integrate your Marketo instance with Salesforce, Marketo allows you to sync your SFDC custom objects that are associated to a lead, contact or account object in Salesforce. There are benefits and limitations of syncing a SFDC custom object or creating a Marketo custom object, so make sure to use your use cases as a guide as you make decisions on how to expand Marketo's native database architecture.

The People Component of Custom Objects

Once you introduce a custom object to the mix, you will require someone with more technical skills. Someone must be able to keep the custom object data up-to-date using the API and if you wish to use information housed on the custom object in your emails (for example, you want to send Carl an email with his classes and their status) you would have to use velocity scripting in your email, a skill most Marketo admins do not have.



Choosing a Deduplication Field + CRM Integration Overview

Like most MAPs, Marketo uses the email address as its primary de-dupe field.

Email Address Makes Sense for a Number of Reasons

- The end user knows their email address. Simply put, if you de-duped on another field like user ID, that isn't as obvious to an end user. This is important when users fill out forms. If they don't know the value of the field you're using to de-dupe, they will either abort the form (if you ask for the dedupe value, like user ID) or they'll be a duplicate record in your database (if you're not asking for dedupe field on forms)

- In B2B scenarios, when someone changes their email address because of a job change, you probably want to create a new record for that person. That way, important historic information (like opportunity data) can remain with the person while they were working at a specific company. All new information can then relate to the new email address and the new company.

That said, you may have the need to change the primary de-dupe field in Marketo to something other than email address.

For Example

We worked with an enterprise credit union to implement Marketo. One person with the same email address could be both a consumer customer (checking account, mortgage, auto) and a business lead (small business loans). The teams focusing on those product lines acted independently of one another. It would have been a significant investment and change management process to merge B2C and B2B records into one person record with multiple accounts. Instead, they opted to mirror their proprietary database's structure and use the account ID as the deduplication field. That way, the B2B team could work B2B records and the B2C team could work B2C records, even though the "person" they were marketing to might be the same. Obviously, this is a decision that must be treated with care during your planning process. In the above scenario, a multi-year plan to create a 360-degree view of the customer was established.

In SFDC

If you are using the native SFDC connector, the SFDC ID trumps email address. Meaning, if you have one person with the same email address represented by two different SFDC IDs, there will be two records in Marketo, each represented by SFDC ID, even though each record has the same email address.

In Marketo

Marketo is able to "see" each of the records in the SFDC. Which brings up another topic – if you're connecting Marketo and SFDC, what records do you want to bring into Marketo? You have two options:

- Create mirrored databases – every record that exists in SFDC exists in Marketo.

- Allow a subset into Marketo – only some of the records in SFDC will come into Marketo, enforced via a global sync filter.

We recommend creating mirrored databases whenever possible but also recognize it may not be possible. In addition to your requirements, this decision can also come down to cost, as Marketo's pricing structure is based on the number of records you have in your Marketo database. Keep in mind, a mirrored structure goes both ways – syncing all records from SFDC and also syncing new records in Marketo to SFDC immediately. For a full breakdown of all the pros and cons of mirrored databases, see the *Appendix*.

We like to think about the relationship between Salesforce and Marketo as one big integrated system. It's not "Marketo and Salesforce" it's your lead to revenue management system.

STEP 3
BUILD

STAGE 2
Data & Asset Migration

3 | BUILD

1 | SETUP

2 | DATA & ASSET MIGRATION

3 | TEST & OPTIMIZE

Introduction

Once you have everything configured in Marketo, you will likely need to invest a considerable amount of time into the migration of data and assets. Let's talk about each separately.

Data Migration

In previous steps, we've outlined requirements, proposed the solution, created buy-in from the our stakeholders and committed to our rollout plan. Now, the work of actually migrating data must begin, per the plan.

If you're connecting Marketo to your CRM, a good portion of the data that will power Marketo will likely come from the CRM. Once you open the flood gates of data from CRM, you'll want to QA and monitor everything throughout the migration process. We have more details on this in the next section, but it's so important, it's worth calling out here as well.

If you're plan also dictates a migration of non-CRM data, for example lead lists or campaign performance in separate marketing databases, you'll want to import them to the appropriate systems as well. Given the flat nature of Marketo's database architecture, that type of data is often better migrated to CRM to "trickle down" to Marketo, versus importing directly into Marketo.

Asset Migration

Enterprise marketing teams rarely implement Marketo as a first foray into marketing motions like email, landing pages and forms. If you're moving from another marketing automation system, like Eloqua, or an ESP, like MailChimp, you'll first need to decide what assets you want to transition.

Catalogue Your Current Assets

To help in that decision, create a catalogue of what you currently have.

LeadMD has a template available here to help: *https://www.leadmd.com/products/#/product/be21v5td28camcjtnh30*

Define Your Email Template Needs

The most important piece of this process is assessing what templates you need. Try to stay focused on the conceptual elements of a template. Take a look at this example to see what we mean.

Instead of plotting out each need, focus on the types of blocks you'll need. Marketo's advanced editor allows incredible flexibility to add and remove sections vertically, so focus on what horizontal blocks you'll need. For example, in the above example, you'll see a horizontal band for a single banner, dual banners or four in one line. On the right-hand side, you can see how those translate on mobile.

Create Templates

Although it might be tempting to simply take the code (HTML) from your current templates and push it into a Marketo template, we advise against this ... strongly. As we mentioned, Marketo's templates are extremely flexible, but only when they are coded as such. That coding does not translate from one marketing automation system to another.

To that end, we recommend starting from the templates built for you as part of your Marketo implementation package, or of course, purchasing something that fits your needs from our content library: *https://www.leadmd.com/products/#/home?filter=emailtemplates*

If you're working with a designer or developer who lacks experience in creating email templates, our best practices here are worth sharing: *https://talk.leadmd.com/53deefb7-449a-4540-b431-6464e411f3f4*

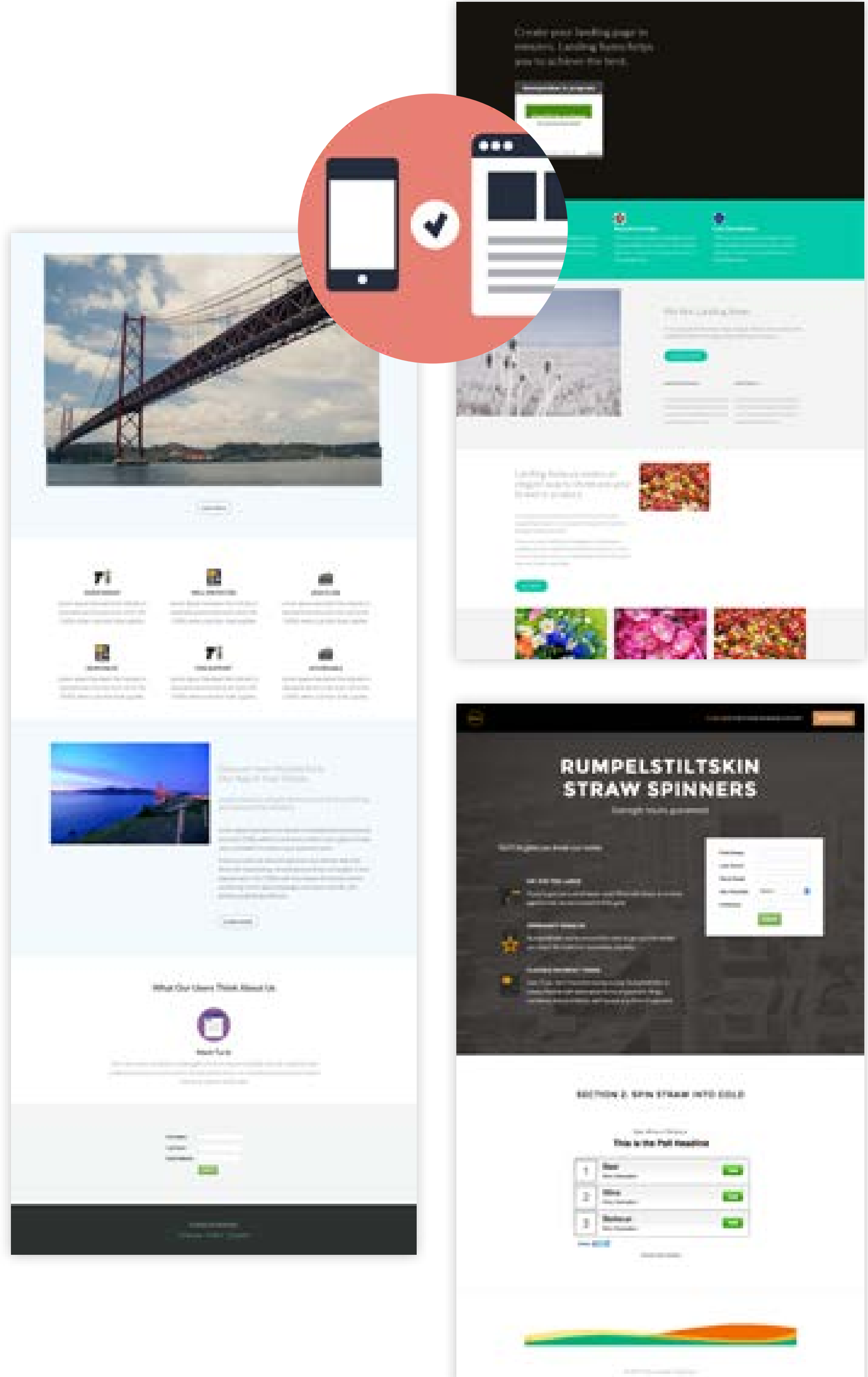
Things like gradients, background images and custom fonts are detrimental to email templates that perform well (in click-throughs) and should be avoided, but a lot of people just don't know the nitty gritty of best practices for email design and development. Help them learn!

Define Your Landing Page Template Needs

Again, reference your asset catalogue and look for trends of major concepts you need to take into account. Take the time to also document the forms you use and the fields on those forms. As you likely already know, the major function of landing pages is to convert the viewers into a known lead.

Whether you use Marketo's landing pages will likely be a function of many organization-wide technical considerations. If you haven't taken these into account in all the planning stages, now is the time to assess how your current website forms perform and if they can successfully be converted to Marketo forms. For the most part, Marketo forms act as a suitable replacement, but there are some use cases where it doesn't make sense:

1. Currently active API integrations. Example: You have a free demo form which creates a user profile in your app.
2. Comments on your blog. Leverage other third party tools like Disquis or your native CMS comment function.
3. Payment Information. If you have an ecommerce element to your site, do not push that data to Marketo, as it does not allow for encryption.
4. Secure storage of any data like username or password or PII data, as, again, nothing can be encrypted in Marketo or hidden from users in the org.
5. 1-to-Many data relationships. Any need to put data into a location besides the persons object like a custom activity or custom object. Example: Product feedback or surveys where there is a 1:N relationship each time the form gets submitted



Create Templates

Again, resist the temptation to simply upload code (HTML) from your website or current templates in another marketing automation system. Marketo's landing page templates are also extremely flexible, but, again, only when they are coded as such.

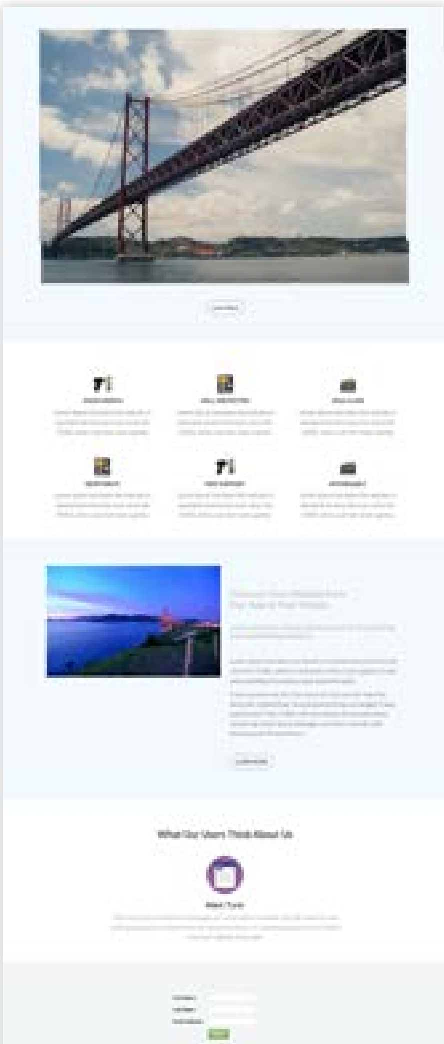
To that end, we recommend starting from the templates built for you as part of your Marketo implementation package, or purchasing something that fits your needs from our content library: *https://www.leadmd.com/products/#/home?filter=landingpage*

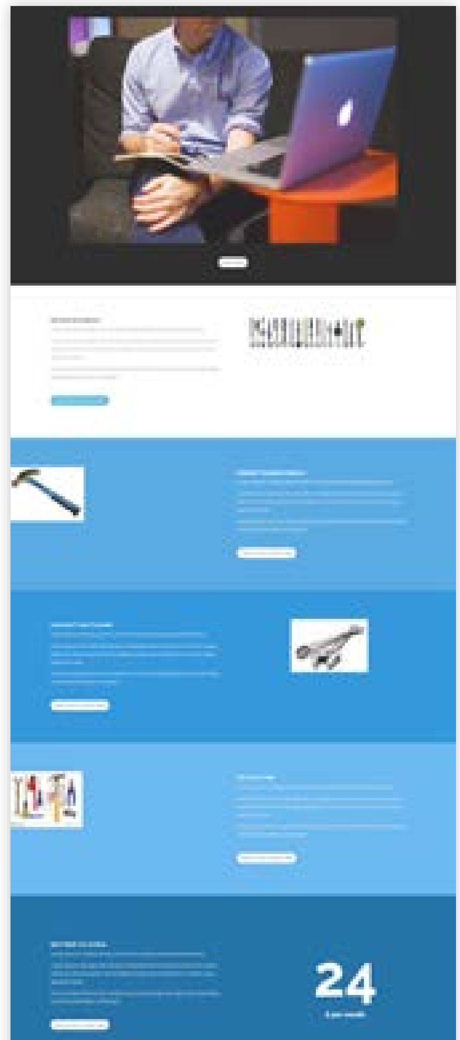
Fill in Email and Landing Page Content

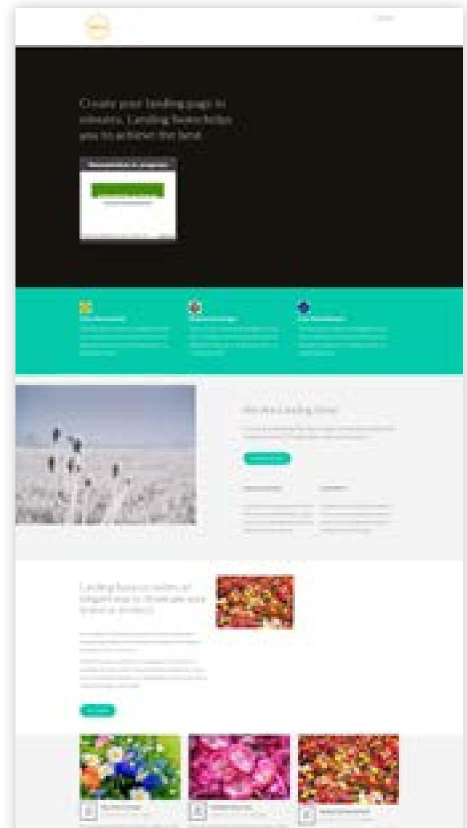
After all that work, it may seem strange that you still don't yet have a completed email in your Marketo instance! But, once the templates are finished, it's time to plugin your copy, set up your subject line, add forms to webpages, create meta data and all the rest.

NOTE

Creating emails and landing pages should always coincide with program creation! And even *more* ideally, the program you create should be a part of your Center of Excellence.







Center of Excellence

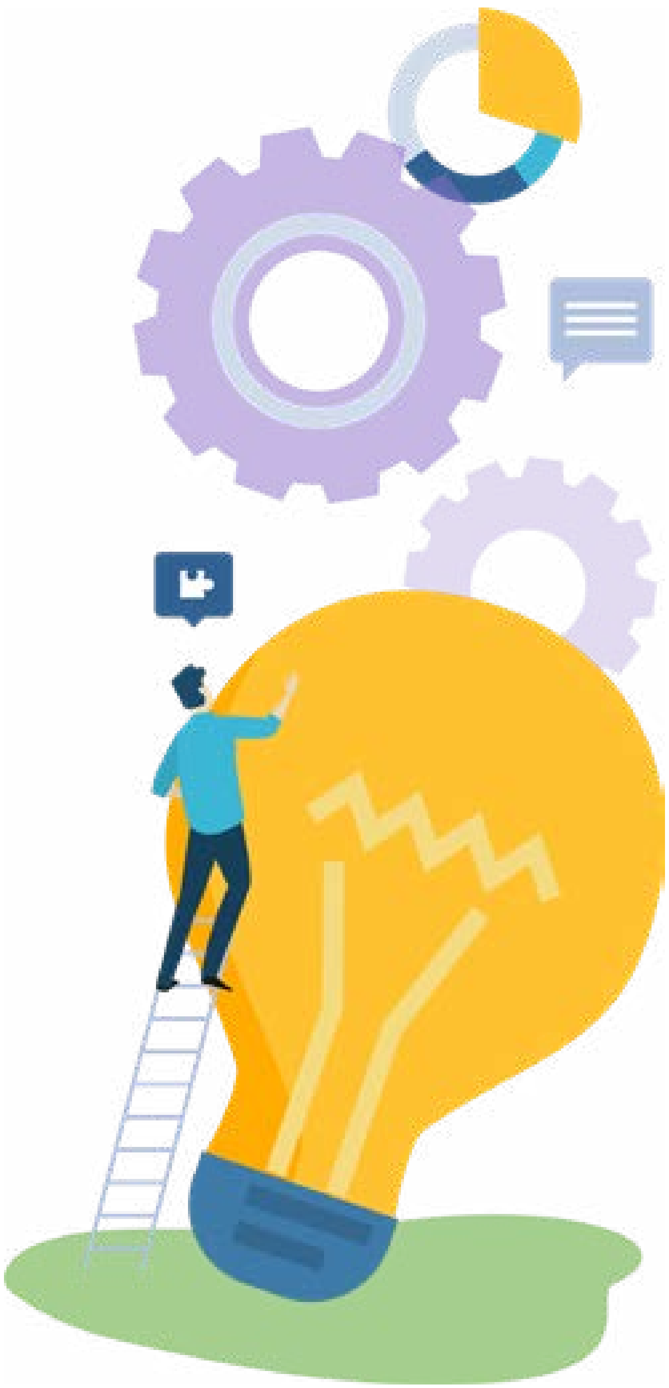
Center of excellence (COE) Definition: a physical or virtual center of knowledge concentrating existing expertise and resources in a discipline or capability to attain and sustain world-class performance and value *[Gartner]*.

A marketing campaign COE consists of the tools, such as landing pages, emails, and smart campaigns, to launch your campaigns in Marketo easily, but leaving room for customization. However, it doesn't have to be limited to just Marketo program templates! It can include sales scripts, sales enablement strategy, reporting frameworks, and more.

Many enterprise CMOs struggle with how to communicate the key initiatives and business impact of marketing internally to cross-functional teams, leadership, and to the Board of Directors. To solve for this, JT Bricker, LeadMD's Chief Strategy Officer, shares that a key factor most commonly missing is definitions and process agreement across cross-functional teams.

> *Aligning on those areas is precisely what Centers of Excellence accomplish and why the best CMOs we've seen and worked with use them.*

JT Bricker
LeadMD's Chief Strategy Officer



Build a program for each marketing channel

Your campaigns should be built in Marketo with one goal in mind = reporting! Think about it...in order to track attribution, pipeline, and revenue, your Marketo programs need to be set up in a way that tracks that attribution appropriately and assigns new people to the right program so that you can report on which channels are performing the best when it comes to generating new names, generating the most opportunities and pipeline, and ultimately which ones are driving the most revenue and return-on-investment.

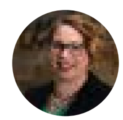
Without that, your organization will never truly be able to optimize and make intelligent marketing decisions about future campaigning efforts.

To get the most out of your reporting, start with setting up a program for every marketing channel your teams leverage. Don't forget offline channels. Although they tend to be more difficult to track, you can and should set up programs for them in Marketo.

For example, let's say you've got a quiz you're promoting to ultimately drive new leads to the database. You're promoting through third-party websites, direct mail campaigns, fax (hey, you've got to go where you're audience is!), Facebook and retargeting ads, and at tradeshows. Once a person takes the quiz and gets in the database, they will enter an email nurture and be passed to your BDR team for follow-up. That's an easy and intuitive digital experience. In addition, sales reps may visit the prospects in person and need a way for them to take the quiz without entering the nurture after. Your setup will need to accommodate these separate goals.

The bottom line? Every single channel should be represented in Marketo so that you can report on its performance.

> *We helped a client create something like the example to the left and above and ended up with 12 paid advertising programs, three direct mail programs, one offline advertising program (fax), one email program, one engagement/nurture program, one website resource program, and one sales generated program, for a grand total of 20 programs in Marketo for one multi-channel campaign! Whew! The key to tracking all of these properly also included a UTM parameter strategy.*



Joy Martinez
LeadMD's Engagement Manager

Integrate third-party tools

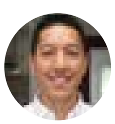
Marketo offers many out-of-the-box integrations through their partner portal LaunchPoint. There are partners in pretty much any category you can think of – from campaign management, analytics, consent management, data enrichment, data science, content, social media, ABM, webinars, etc.

Connecting your tech stack together can help you increase visibility to performance and activity to things that reside outside of Marketo or your CRM and can help with better storytelling of your marketing data/performance.

First, look at your marketing tech stack and map out any current integrations. Next, identify any gaps where there isn't an integration. Finally, if there is a native connector to Marketo, set up that connector through LaunchPoint. Or, if there isn't a native connector, explore if an integration through a webhook or API may make sense.

For example, let's say you use Oktopost to manage and schedule social media. You're in luck! Oktopost has a native integration with Marketo where you can see activity behavior on people clicking social links, mentioning your company in social, and more. Or maybe you're running a live webinar through GoToWebinar or WebEx...they, too, have a native integration with Marketo. These native connectors help provide greater visibility, increased automation, and thus a better picture into the overall customer experience journey.

> *Use LaunchPoint partners that offer a native integration. It will make your life/job a lot easier to manage from a platform perspective.*



Charlie Kim

Sr. Marketing Automation Manager at Becton Dickinson

At the bare minimum, all enterprise orgs should be integrating relevant tools in these areas:

- ☐ Social media tool (like Oktopost or Hootsuite)
- ☐ Webinar tool (like GoToWebinar or Zoom or On24)
- ☐ Event registration tool (like Cvent or Splash)
- ☐ Content tool (like Uberflip)
- ☐ Blog management tool (like Digesto)
- ☐ Video management tool (like Vidyard or Brightcove or Wistia)
- ☐ Attribution tool (like Bizible)
- ☐ ABM tool, if applicable (like Madison Logic or Engagio)
- ☐ Advertising campaign management (like AdRoll, LinkedIn Lead Gen, Facebook Lead Ads)
- ☐ Online chat tool (like Drift)
- ☐ Sales enablement platform (like Showpad)

Integrations can allow for enhanced segmentation and lead scoring within Marketo, which help move someone along in the sales funnel as well as create more targeted campaigns and nurture programs.

A Tip from 3x Marketo Champion

Kim Allen

Senior Marketing Consultant

COE program templates should be detailed but remember, we want to be able to reference and even clone these best practices. Including too much detail relative to a certain event or email send may be detrimental, leading to confusion and errors.

Here are some items to keep generic

Assets

Emails and Landing pages should be formatted to fit the program channel but don't need specific copy. Leave placeholder copy in there so you can easily spot what you need to edit.

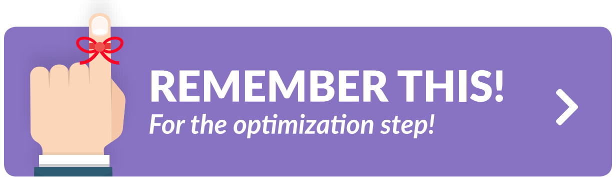
Lists & Membership

Don't include person records or specific smart list filters in these templates, just don't.

Tokens

If you're utilizing program tokens that have values that shouldn't be reused each time that type of campaign is run, insert placeholder values.

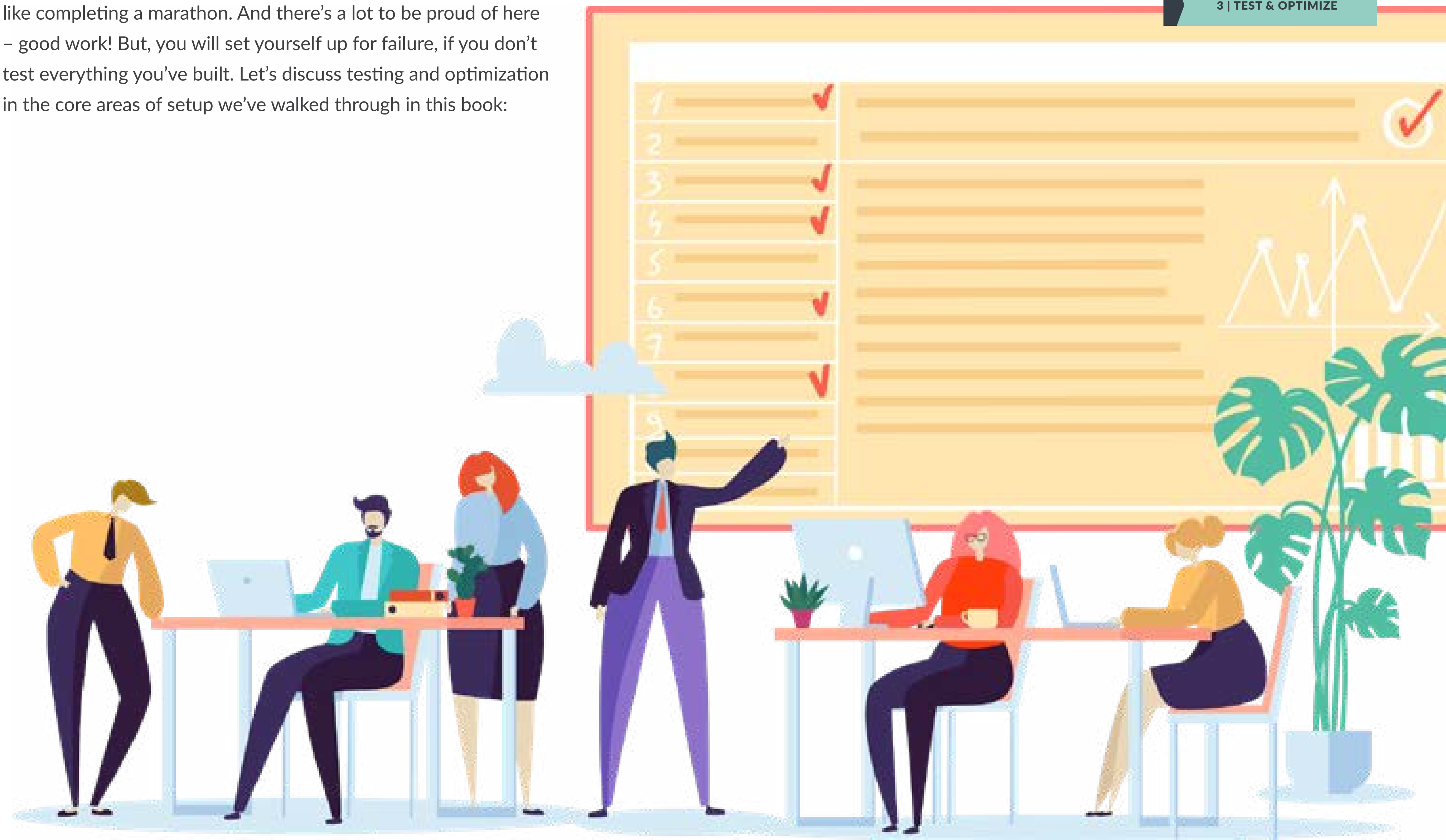
Start with less, and through use work to fine-tune if you need more. Don't forget to get input from the rest of the team!



3 | BUILD
1 | SETUP
2 | DATA & ASSET MIGRATION
3 | TEST & OPTIMIZE

Test & Optimize

When you've finally finished setup and migration, it will likely feel like completing a marathon. And there's a lot to be proud of here – good work! But, you will set yourself up for failure, if you don't test everything you've built. Let's discuss testing and optimization in the core areas of setup we've walked through in this book:



What You Can Test on Your Own

For some testing you'll need to involve other members of your team, especially for user permissions and roles, but start with all the areas you can test solo.

Revisit the Requirements Document

Align testing scenarios to each requirement to test. Depending on the level of detail for each requirement, you may require more than a single test to accurately determine "Done" status.

Example

Requirement 0001 states, "As a sales rep, I must know immediately when one of my named accounts has qualified as MQL."

Testing Protocol 001: *Submit automatic qualifying form fill, Contact Us*
Testing Protocol 002: *Lead qualifies through a series of email opens, click-throughs and website visits via lead scoring*
Testing Protocol 003: *A decision maker in a named account attended a webinar, which is an automatically qualifying activity*

NOTE Testing Protocol 002 will require deploying emails (a test in itself), click through CTAs (another test of emails), and visits to webpages (Munchkin tracking testing). Then further, you'll be testing your lead scoring program and lead lifecycle and routing flows when you qualify.

So, you can see how with one simple requirement you're testing various functionality. The brilliant thing about starting from your requirements doc is that it keeps you focused on the business outcomes that will make your Marketo implementation a success.

NOTE Per a quick note from earlier, the optimization stage and the rest of the stages will be repeated as your users get into Marketo and actually perform their daily tasks. Set the expectation that optimization will be a consistent focus and expected.

What You Can Test with a Friend

For user permissions, you can use another email address and test for yourself, but we recommend getting someone who is very excited about Marketo to test user permissions. In addition to testing, this strategy also gives you an early advocate within the organization who will aid you in championing best practices. Find yourself a buddy!

Optimization

During your pre-launch testing, you will likely find areas of the implementation where things didn't happen according to plan or once you see it working "to plan" realize there's a better way. That's the point of the testing!

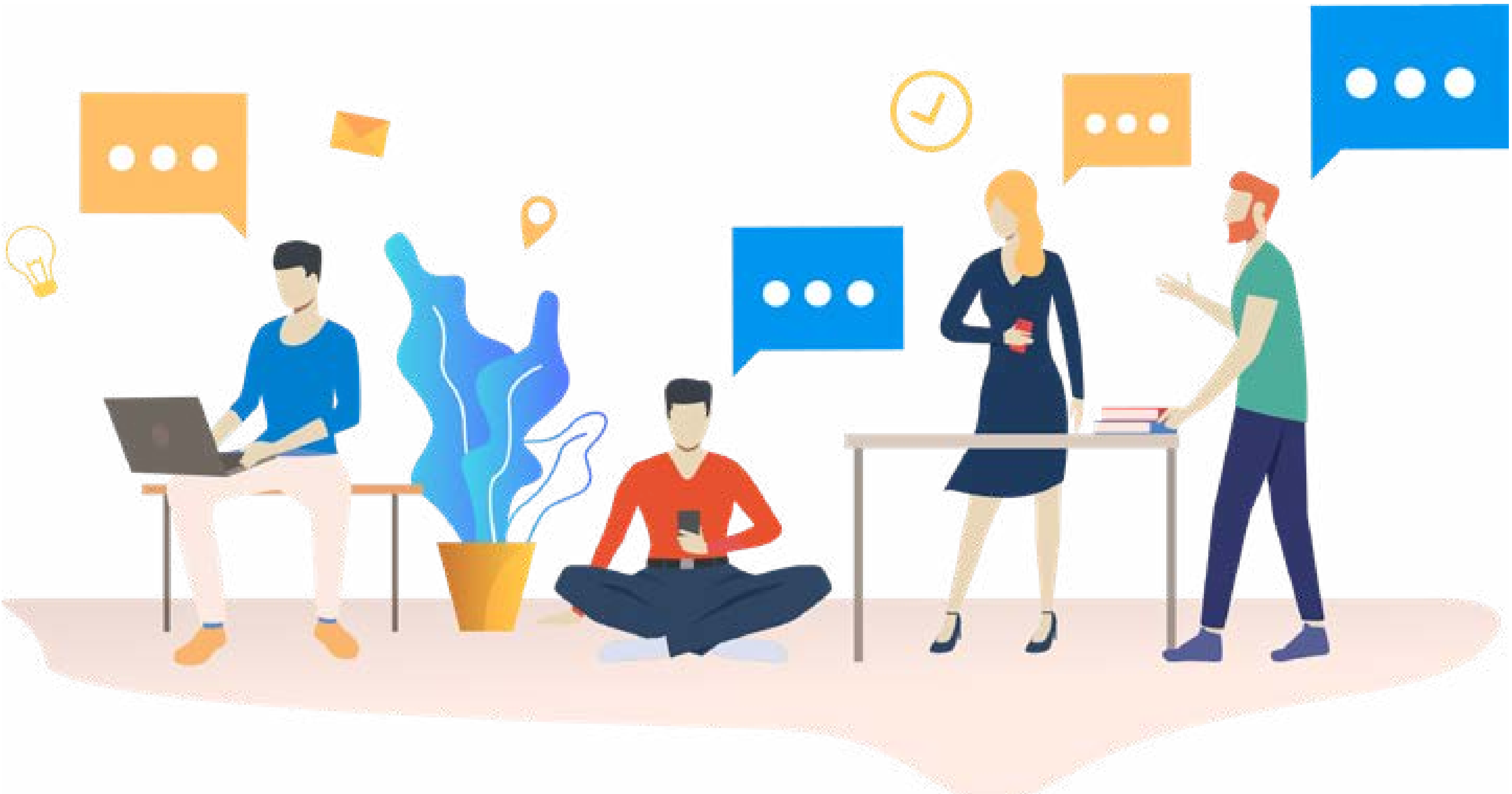
So, optimize those areas. Take the time to go back to your Catalyst Committee and keep them updated and bought in on your optimization.

STEP 4 | STAGE 1

ENABLE | *Documentation*

Enable

You've done it. Marketo is setup and tested and everything looks great! Before you break out the champagne, you have a few more things to do. Namely, you need to setup the people, who will use Marketo day-to-day or those who will engage with the data coming from it, for success.



Documentation

Documentation. It's a word that strikes fear in the hearts of many, but don't be scared! You already have all the elements you need to create great documentation. Let's breakdown the documentation in the following categories:

1. Technical Requirements
2. Marketo User Job Aid
3. Data Consumer Job Aids (by Role)

Technical Requirements

This is a document that details all the technical elements you've build. From the CRM integration (including the nitty gritty of the field-level data governance) to the lead flows and partition management. If you ever leave the organization, the decisions you made and the technical implementation of Marketo will take a long time to uncover. Trust us: We've had to document setups after someone leaves and it's painful!

Most of the technical elements are likely already documented in all the steps you performed to create requirements. Hopefully, this won't require too much additional time and effort.

Marketo User Job Aid

Hopefully you've decided to create a Center of Excellence, which means that the job aid will have the specific scope of walking your users through how to clone and adjust only those specific programs. We recommend the format of this be dual consumption methods: video recordings and help articles.

We also recommend housing these job aids in your learning management system or intranet wiki. Make it easy for your users to find the details on just the question they have. Implement a campaign playbook for enterprise-worthy campaigns.

PRO TIP

And it always comes back to documentation! Your COE doc should include:

- Build details, including links and screenshots
- Processes to Follow
- Naming conventions
- Defining "successes"
- All necessary steps to execute (Including costs, when to activate triggered campaigns, etc.)
- Notes such as ideas for future improvements

Campaign Playbook

Just like you would use a cookbook (or...Pinterest) to make your favorite recipe, enterprise organizations should be using a campaign playbook when it comes to running marketing campaigns. A campaign playbook is your guide to creating repeatable, go-to-market campaigns. *[See what's included in a campaign playbook]*

At a high-level, a campaign playbook helps you ideate, strategize, plan, develop, launch, and optimize your integrated campaigns. It goes deep into the who, what, where, when, why, and how of marketing campaigns!

Because large enterprise organizations often have multiple roles, departments, business units, and sometimes global divisions, having a centralized playbook that everyone follows will help create consistent campaigns organization-wide, which will help drive consistent reporting if campaigns are executed in the same way across the org.

A playbook will also help get your marketing campaigns up and running with greater speed and agility, which means more time for campaigning in general throughout the year. Greater speed to market = quick impact on the bottom line *[See what's included]*

Data Consumer Job Aids (by Role)

This is one of the most important elements that determines if people see jaw dropping success with Marketo. Creating buy-in is good, but when you create documentation and training for those who will consume data from Marketo, it maintains the momentum and excitement about not just the implementation of a technology, but truly the transformational nature of what it allows businesses to do. This documentation tends to focus on the follow roles: executives (CMO, CRO, CEO), sales people and even customer success or product people (depending on the data you're collecting in customer email and website touchpoints). Customize this information per role for the best effectiveness. As an example, your BDR job aid will likely differ from your AE job aid.

Again, you should be able to leverage things like user stories and the other documentation to create this. So, although it feels like "another thing" it should come together fairly quickly!

STEP 4

ENABLE

STAGE 2

Training & Enablement

Training and Enablement

Marketo, like most tech, is only as good as the people who work in it.

Here are some ways that we suggest you enable your team:

1. Create a workspace/partition combo dedicated to learning. Before new Marketo users can graduate to a production workspace that has access to real leads, they must show they are capable of running programs in the learning environment.
2. Host weekly office hours with the divisions – one with a shared topic (like how to create a lead scoring program or a nurture program) and one that is an open forum for questions. Record, tag, and stick them someplace that is findable.
3. Invest in Marketo training (check out LeadMD's Six Bricks platform, which is an interactive learning experience)
4. Ask for headcount: Depending on your scenario, you may need to invest in new players with the right skills or to fill capacity gaps
5. Don't be shy to work with a partner who can understand what you're trying to accomplish as a business and can translate that into the system. It helps to work with one partner who understands the intricacies of your system at a global view (and maybe even helped you implement it) who can support the divisions.

> *Before providing Marketo access to someone, I set up a demonstration of the platform for approximately two 1-hour sessions. Heavy Marketo users are required to take a minimum of five 1-hour sessions. During the first session is when I provide them with Marketo access which helps to make sure they aren't navigating through the platform without knowing where everything is.*

Regan Curry
S&P's Global Marketing Manager

Optimize

As you probably noticed, we're using optimize here and optimization earlier. That's on purpose. The optimization, documentation, training and measurement will be a cyclical process… forever. Being a great marketer is all about action, learning, revisiting and continuing to learn. So, embrace it!

Measurement

Do you remember the little “Remember this” call out for reporting? Well, it’s finally time to bring those to life here. Be sure you’re focusing on the reporting requirements outlined at the very beginning. As you start to build the reports that the Catalyst Committee planned to use to understand the success of a Marketo implementation, we have a unique approach to maintaining order and alignment. Take it from our Reporting Guru:

> *When you save your reports, don't just give them a regular name. Explicitly list the question(s) that each report answers.*

Drew Smith
LeadMD's Engagement Manager

PRO TIP Always listen to Drew. But also, if you follow his advice, you'll be able to quickly cross the reports off your list as you build them.

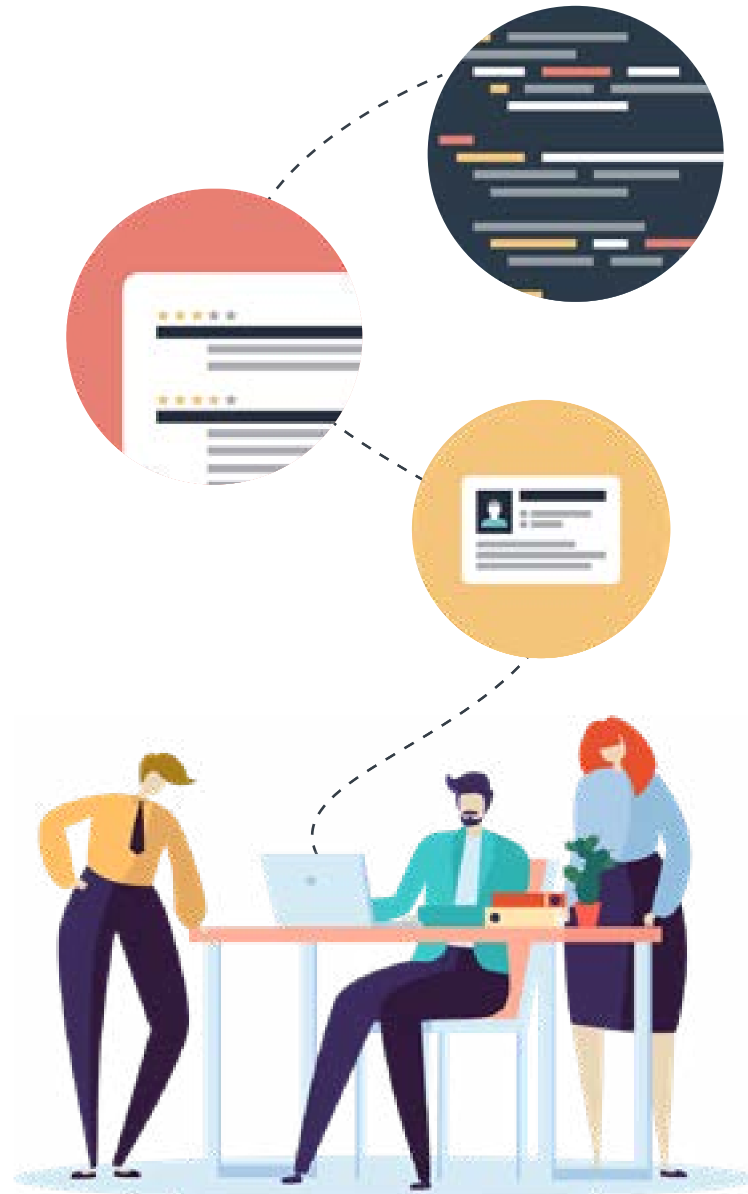
In addition to the key above, there are two big pitfalls here.

Reporting Pitfall 1: Too many questions

Don’t try to answer too many questions in one report. Keep it simple. If you try to answer too many questions in one report, your report will become very confusing and difficult to interpret.

Reporting Pitfall 2: Reports for reporting sake

Do not build reports that don’t answer specific questions. If your question starts with, “It would be nice to know…”, it’s not a valid question. If your report doesn’t tell a story, or answer a question, it’s likely too broad. You know the type of



report I'm talking about. They're the reports that you look at and go, "I have no idea what I'm supposed to take away from this report."

Quality Assurance

All the reports in the world won't matter if the data is inaccurate. As a matter of fact, it's worse than not having reports at all. So, make sure you QA your reports. This process is going to be completely different for each report you build, so we can't really give you too many tips here... other than, do your due diligence. It's well worth it. And, of course, if you have an analyst, they will be well-positioned to troubleshoot and assess any discrepancies.

Dashboards

Once you have a suite of reports built, it's time to combine those into dashboards. Just like reports, dashboards need to have a specific purpose and answer specific questions. If they're too broad, you won't know what to take away from the dashboard.

> *I like to group key topics and areas together. So, I'll create a dashboard for Paid Search that consists of a suite of reports all answering the various questions I might ask about Paid Search. I'll create another dashboard for Social Media that consists of a suite of reports focused on answering questions about Social Media. This keeps my dashboards focused and prevents me from trying to do too much with one dashboard.*

Drew Smith
LeadMD's Engagement Manager

Add Context

Reports are great and help us answer a whole host of questions about how we're performing. But, without context, reports can lead us to conclusions that aren't exactly... accurate. Let's say you have a report that tells you that Paid Search influenced the creation of 500 leads in Q1. Is that good? Sounds like it could be. But what if we told you that in Q4-18 Paid Search influenced the creation of 600 leads. Is that 500 still good? Not anymore. And what if we told you that in Q1-18 Paid Search influenced the creation of 300 leads. Is that 500 good? Now, it looks good again. Context changed all of that.

As we progress, we need to create versions of our reports and dashboards that add that context. Context means both quarter-over-quarter and year-over-year. Year-over-year is super important because it helps filter out any potential seasonality that may exist in your business... whether that seasonality is known or unknown.

Create a Template

Reports and dashboards provide you with data. Data is useless if it isn't analyzed. A template provides us with guardrails that show us exactly how we're going to present not only the data, but the key takeaways from that data.

When you enter the boardroom to present, you're not going to show them raw data. You're going to show them a series of conclusions, that are supported by data. So, create the PPT template that has placeholders for your conclusions or takeaways, along with placeholders for the raw data that supports these conclusions.

This template is then used repeatedly on a monthly/quarterly/annual basis... whatever your reporting cadence is.

Be prepared to say, "I don't have that answer... but I can get it."

See, we can predict what the top-level questions are going to be each week/month/quarter/year. But we can't predict the questions that are going to be generated by the answers to those top-level questions. These questions are things like, "Why did Paid Search influence fewer opportunities this year over last year?", or, "Why did our marketing stop influencing pipeline for Business Unit X in Q1?" Those "why" questions are the second and third level questions that should come from great reporting. And quite frankly, those "why" questions can take three, four, or 15 different reports to answer. So, leave those out. We'll create them when we need them.

The Final Product

This has been a long and arduous process, but the reward is well worth it. Your enterprise should have a full 360-degree view of every record in your database. You should have no data gaps or silos. And, you should have reporting which provides baseline analysis of that data and periodic reporting of the analysis.

STAGE 2

Maintenance & Support

We're Done Now, Right?

Well, kind of. If you've taken the time to implement Marketo with strategic business objectives in mind and train and enable everyone, your maintenance should be pretty hands-off. If you've had to rush or skip some steps, you may need to commit more time and energy to maintaining the database.

One big element of maintenance that no amount of planning can remedy is data. People and company data changes every minute of every day. Automation through data providers, like DiscoverOrg can help maintain this, but expect to need to consistently delete, merge and update records. When you begin receiving bouncebacks from your email sends for people who are no longer with their organization or have a new email address, be sure you have process to update the database. That can be as simple as having one person manning the Reply To email address and updating manually, or as technology-enabled as purchasing Siftrock, now a Drift company, to update automatically.

Support

Marketo has various options for technical support, which we typically see people invest in early in their Marketo purchase, but phase down over time. And, of course, one last selfish plug for LeadMD ... we have the largest bench of Marketo Certified Consultants on the planet. Whether you need extra hands to help get things implemented, training and enablement, data analysis, strategic business case development, or any combination thereof, we can help!

Thank You

Thank you to all the LeadMD customers who entrusted their Marketo implementation and strategy to us over the years. It's because of your belief in the power of Marketo that we've all been able to learn and grow with this incredible technology.

A special thank you to the contributors of content for this ebook:

Jamie Kirmess
Principal

Joy Martinez
Engagement Manager

Stacy Smith
Senior Project Manager

Kim Allen
Senior Marketing Consultant

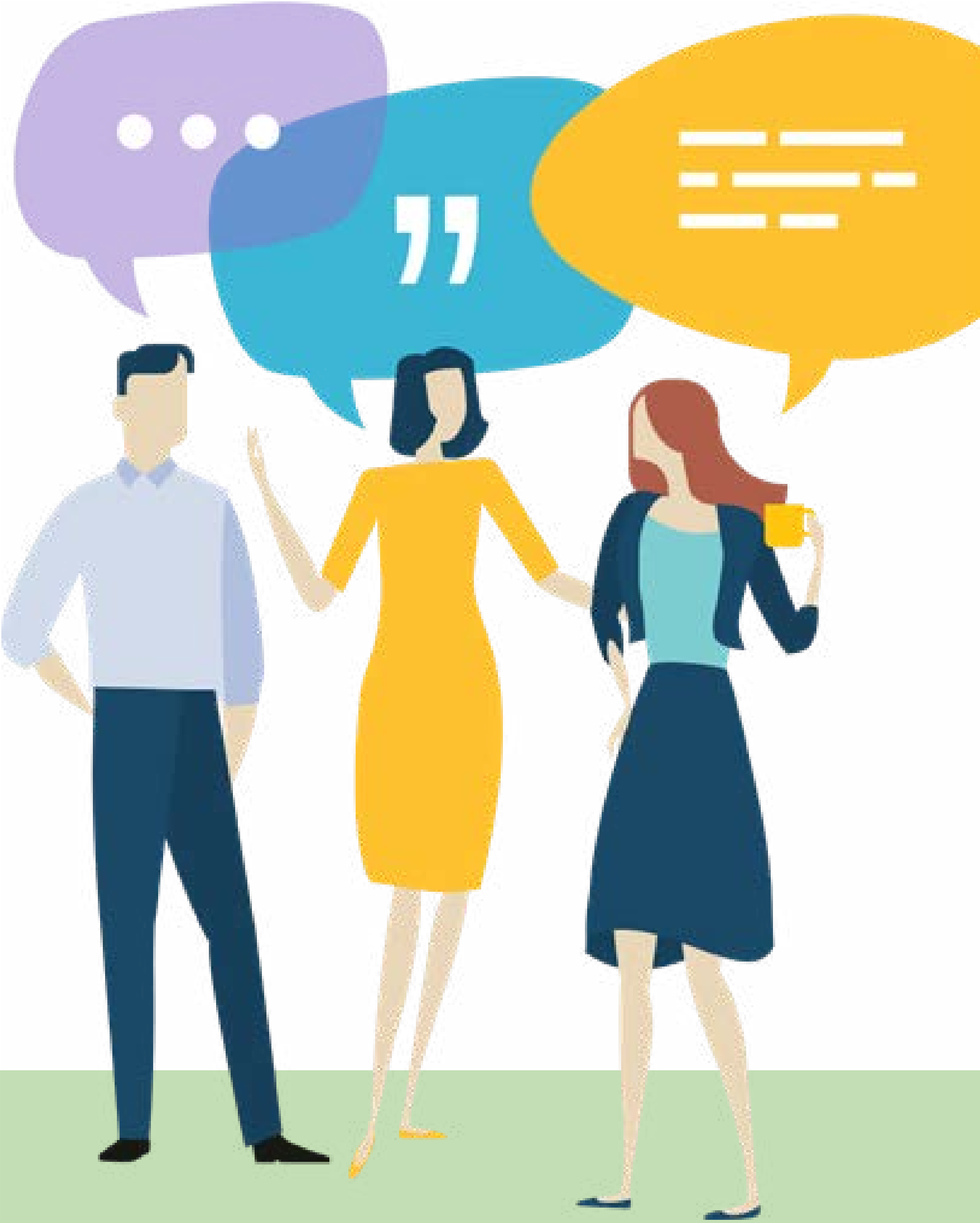
JT Bricker
Chief Strategy Officer

Drew Smith
Engagement Manager

Cassie Coke
Engagement Manager

Natasha Ness
Principal

Andrea Lechner-Becker
Chief Marketing Officer



Appendix

Division of Assets: Separate Marketo Instances vs. Workspaces and Lead Partitions

Enterprise organizations with multiple divisions often require strict division between the people the divisions can market to or the assets (emails, landing pages, reports) they use. In some situations, an organization is able to keep all divisions under one Marketo instance; however, in many enterprise organizations, multiple instances of Marketo are required.

What is a workspace and a person partition?

Marketo's documentation does a good job of describing a workspace: Workspaces are separate areas in Marketo that hold marketing assets like programs, landing pages, emails and more. They can be used by multiple people. Each user has access to one or more workspaces. Think of workspaces as separate Marketo instances within a larger instance, minus the lead database. Person partitions are those "separate" databases within one global instance of Marketo. Each partition has its own people that do not de-dupe or mix with other partitions.

You can assign person partitions to workspaces in the following configurations:

- One workspace to one person partition (1:1)
- One workspace to many person
- Many workspaces to one person partition (x:1)

Given there is only one instance of SFDC, that eliminates the benefit of each division having its own Marketo instance. So, let's move on to how we could structure separate divisions within one Marketo instance.

Examples

Company: Ice Cream and Donuts

Division 1: Sells ice cream to businesses

Division 2: Sells donuts to businesses

Division 3: Sells ice cream machines

Division 4: Sells donut machines

Company: Ice Cream and Donuts

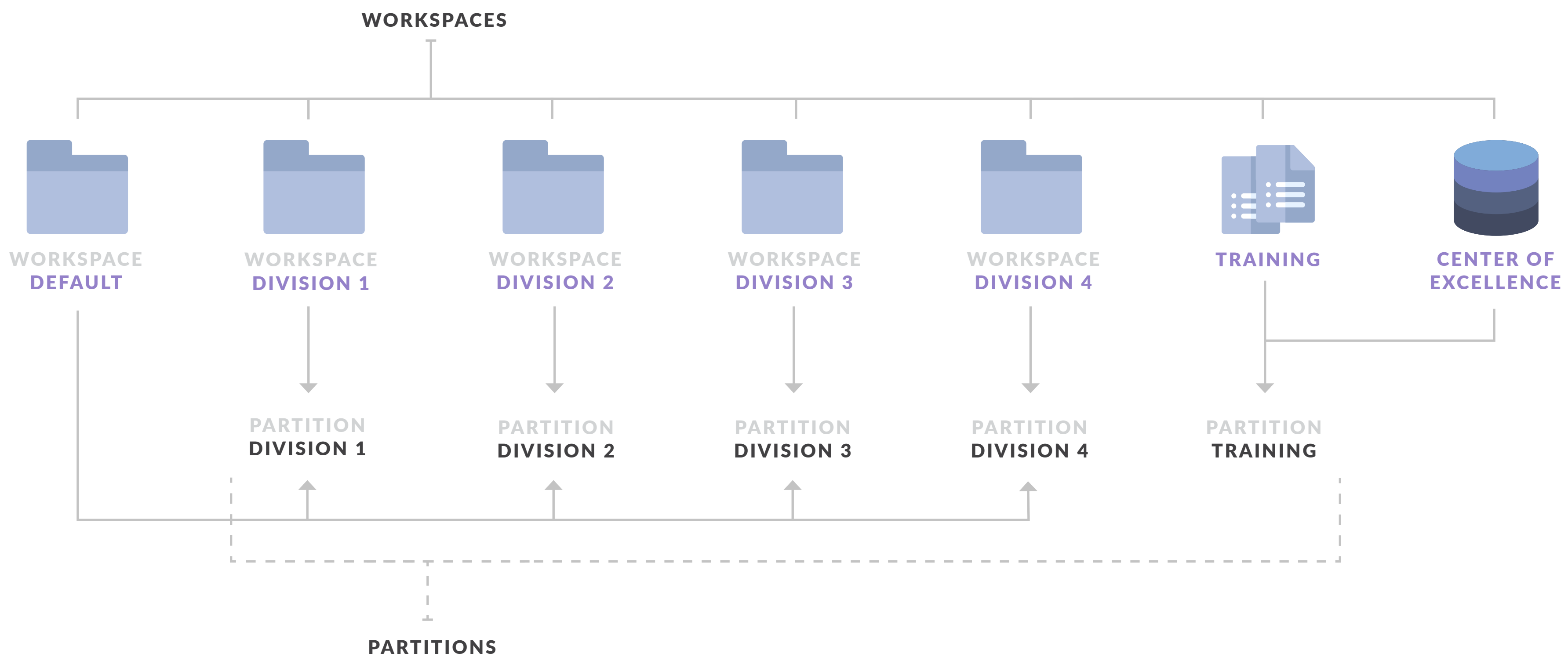
- *Although each division has its own marketing team, each division operates under the same global brand, so email templates and landing pages could be shared.*
- *They share one SFDC instance*
- *There in some audience overlap*
    - *Division one and two generally sell direct to retail stores and restaurants, plus to distributors. Some accounts only buy ice cream, some buy only donuts and some buy both.*
    - *Division two and three sell to other ice cream and donut manufacturers. Some buy ice cream machines, some buy donut machines and some buy both.*

Option One: One workspace to one person partition (1:1)

Each division has its own workspace (mini Marketo instance) with its own database of contacts. This configuration is the closest to each division having its own Marketo instance. Admins can restrict access beyond each user's division so that when division one users log in, they only see their division's marketing assets and can only run campaigns against the people in the division one lead partition. An important factor in the way that partitions work is that a person cannot be in more than one partition. Because divisions one and two share leads and divisions three and four share leads, this option would not work.

NOTE We always recommend creating a default workspace with access to all partitions so that Marketo admins can run global, operational programs that affect all people in the database.

EXAMPLE *(1:1) Workspace to Partition Flow Chart*



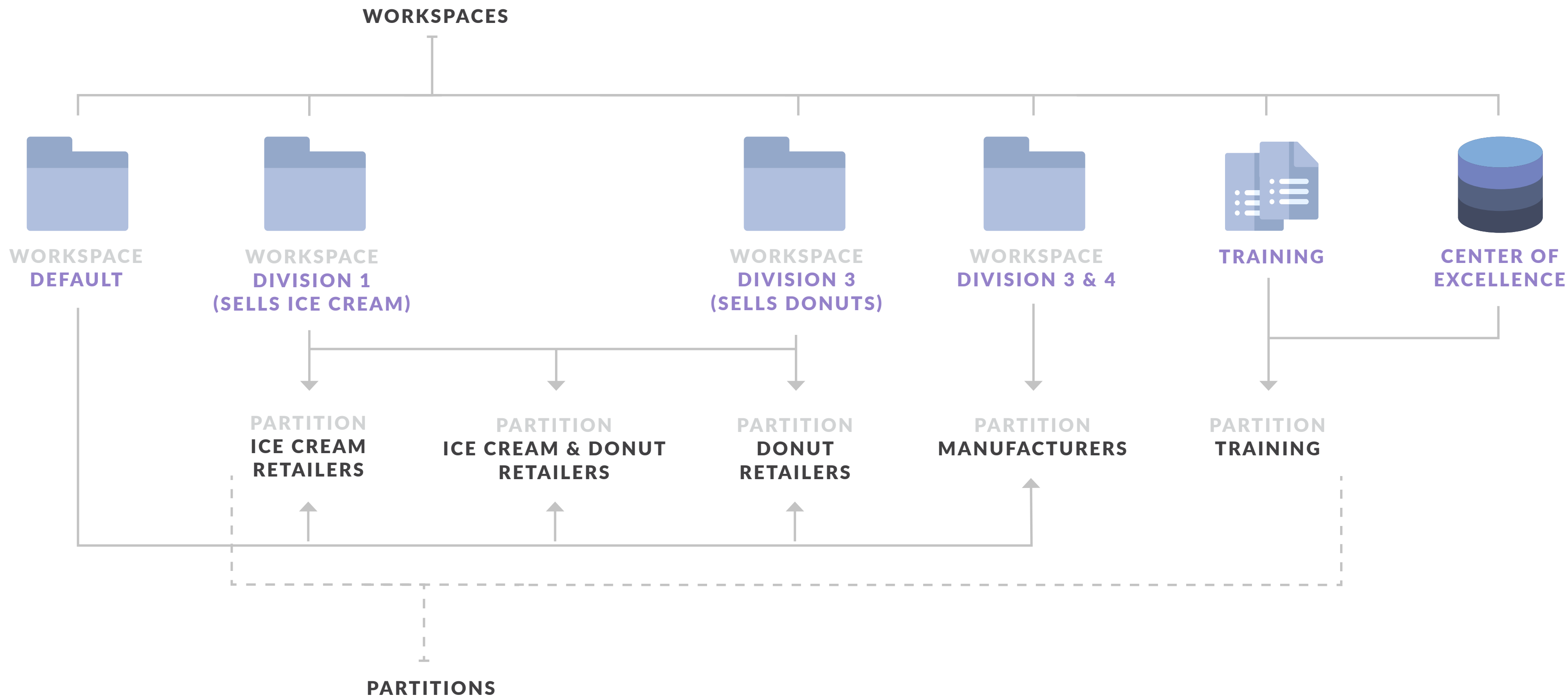
Option Two: One workspace to many partitions (1:x)

Since division one and division two share some people, but also have accounts that only buy ice cream or donuts, each division could have access to its own workspace and partition, along with access to another "shared partition" housing the accounts that buy both ice cream and donuts. The same configuration could be replicated for divisions three and four, or as shown below, divisions three and four could share a partition. This configuration could work; however, keeping all of these partitions accurate (a global routing program will need to be established) can become quite complex. In addition, from a business perspective, there is a high likelihood that some of the accounts in the "just ice cream" or "just donuts" partition could eventually move to a shared partition.

NOTE

The Default workspace should always have access to all partitions, minus the training partition. This allows global operational programs to be run. Depending on the configuration, your organization may want to create a "holding" partition where leads can be put initially and then routed to the correct partition.

EXAMPLE *(1:x) Workspace to Partition Flow Chart*

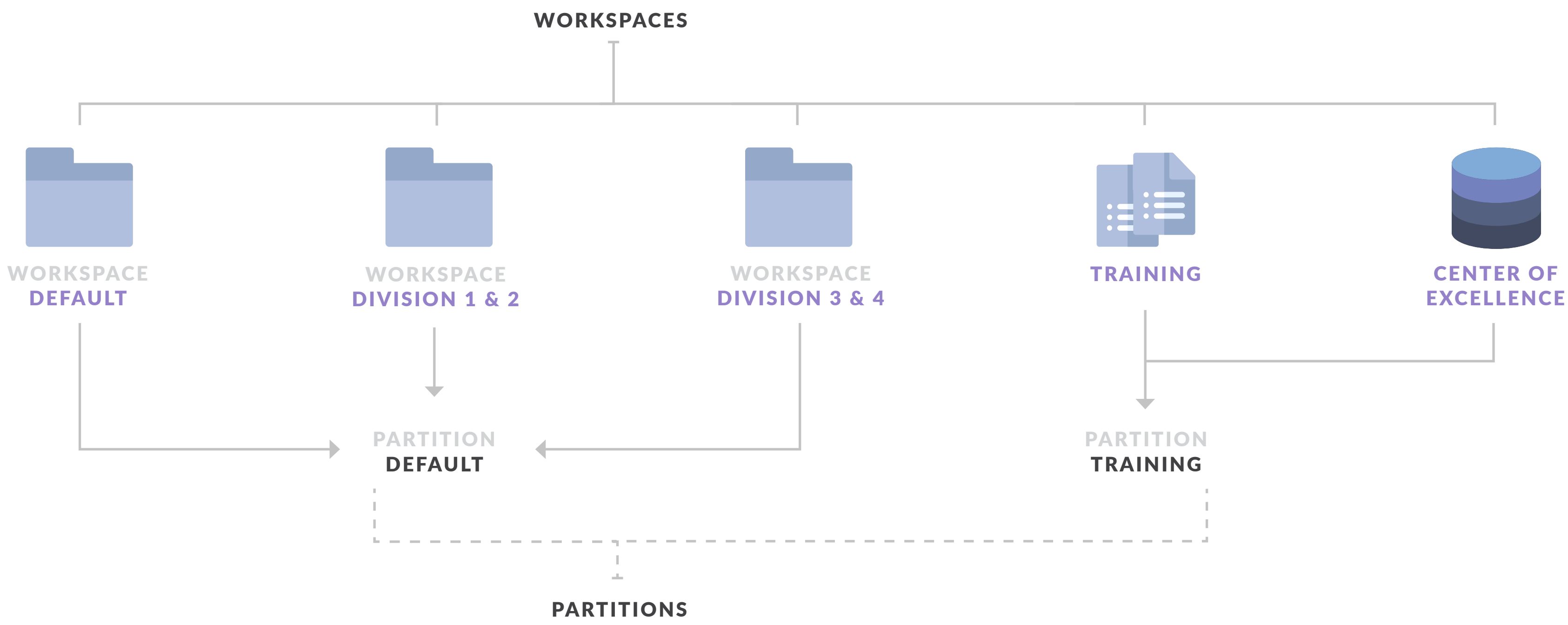


Option Three: Many workspaces to one person partition (x:1)

In this example, each division combination (divisions one and two share a workspace and divisions three and four share a workspace) would share one default partition. You could also separate divisions one and two and three and four into their own workspace that share one person partition. Or you could divide the one default partition into two partitions – one for division one and two and another for division three and four. The upside is that there is far less to manage in terms of routing leads into the correct partition.

The risk is that each division would be able to access the same leads, so all marketers would have to have intimate knowledge of how to build lists so that only the right records are actioned upon. There are lots of options for configuring access to different marketing assets and people in Marketo. Going through a complete assessment of database inputs, shared leads, brand identity, process and skillset will help ensure you make the best decision possible.

EXAMPLE	*(1:1) Workspace to Partition Flow Chart*



Reasons to Mirror Your Databases

1 **Prevent Duplicates**

How can we expect sales to be great at keeping their data up-to-date when they can't even see all of their leads? Sequestering leads in Marketo is one of the primary reasons duplicate records happen.

For Example

Let's say you and sales go to a tradeshow. You collect a lead, Harry Smart, via your badge scanner. The badge scanner automatically syncs the lead to Marketo, but you do not sync that lead to Salesforce because you want to further qualify the lead before handing it off to sales.

Your sales rep, Jim Bob, also talks to Harry Smart at the tradeshow. Jim Bob gets Harry's business card. A couple days after the tradeshow, Jim Bob enters Harry's basic information into Salesforce because he sees that Harry Smart does not exist as a record. The lead comes from Salesforce to Marketo and, even though the Harry Smart that Jim Bob entered into Salesforce has the same email address as the Harry Smart we collected via our badge scan, Marketo treats this as a new record because it has a Salesforce ID.

Now you've got duplicate records for Harry Smart.

2 **Improve Marketing Communication**

Let's keep going with our Harry Smart example. Jim Bob calls up Harry and learns that Harry fits our BANT criteria. Jim Bob opens up a $100k opportunity with Harry. They set up a meeting with other stakeholders to demo your company's product. Things are looking great for Jim Bob.

Meanwhile, your marketing team has put a strategy in place around how you're are going to communicate with the leads you collected from the tradeshow. You decide to send an email that looks like it is coming from a sales rep. Since Jim Bob went to the tradeshow, you put Jim Bob's name on it. You send an email to leads asking them if they want to set up an intro meeting. Now Harry is getting emails from Jim Bob asking to set up a meeting when they've already gone through that step.

3 **Increase Accuracy in Marketing Attribution**

About a month later, Jim Bob wins the opportunity with Harry. Great for Jim Bob, not so great for marketing. Unfortunately, Jim Bob didn't put a lead source in when he entered Harry's information, so he was marked as "sales generated." Marketing – despite being the brains behind the tradeshow – will not be able to join in the celebration, because the data doesn't let them know the true source. Had you synced the lead right away, Jim Bob never would have entered a duplicate in the first place and you'd have $100k in first touch attribution to show for your tradeshow efforts.

4 **Streamline Lead Routing**

If you do not have a consistent way to sync leads to Salesforce immediately, you're probably inadvertently creating leads through implied Marketo flow steps.

The following Marketo flow steps will create a new lead if one does not already exist:

- Add to SFDC Campaign
- Change Status in SFDC Campaign
- Change Owner
- Convert Lead
- Create Task

Using these flow steps will sync people over in a manner that you do not want, probably accidentally.

Let's say that in your follow-up email from the tradeshow, you change Harry's status to "delivered" once your email successfully reaches Harry's inbox. You accomplish this via the “Change SFDC Campaign Status” flow step. If a lead does not already exist, Marketo will first create a lead and then change the SFDC Campaign Status.

What you forgot is that you have auto-assignment rules set up. Plus, you send alerts to your sales reps whenever a new lead is created. That simple flow step of changing the lead’s status has now created a bunch of leads in Salesforce and also fired off hundreds of alerts.

How’s that for helping your sales team prioritize their leads?

5 Display Timely Campaign Data

Let’s pretend that Jim Bob never met Harry and no duplicate records exist. Marketing captured Harry’s contact information at the tradeshow and is nurturing him to be ready for sales.

The week after the tradeshow, Harry opened a few emails and had a surge in web activity. It was almost enough to push him over our scoring threshold, but not quite. Two months later, he starts engaging with our brand again. So much so, that he is deemed “marketing qualified” and is pushed to Salesforce.

Jim Bob looks at his new lead’s web activity, but because we didn’t sync it in real time, it looks like all of the activity happened at once, rather than over two months. A page visit looks like it occurred today, but really it was two months ago. Jim Bob prioritizes Harry over other leads who are expressing active buying behavior and even mentions that he saw Harry was inquiring about pricing. Harry likely doesn’t remember visiting the pricing page and now Jim Bob looks like an out of touch sales rep.

By the way, when you mirror Salesforce and Marketo, it allows you to use the SFDC campaign to Marketo program sync as well, which has a lot of advantages.

Not having a 1:1 sync adds complexity to this system that ultimately hurts your entire process. Just like in a relationship between people, open lines of communication are always best.