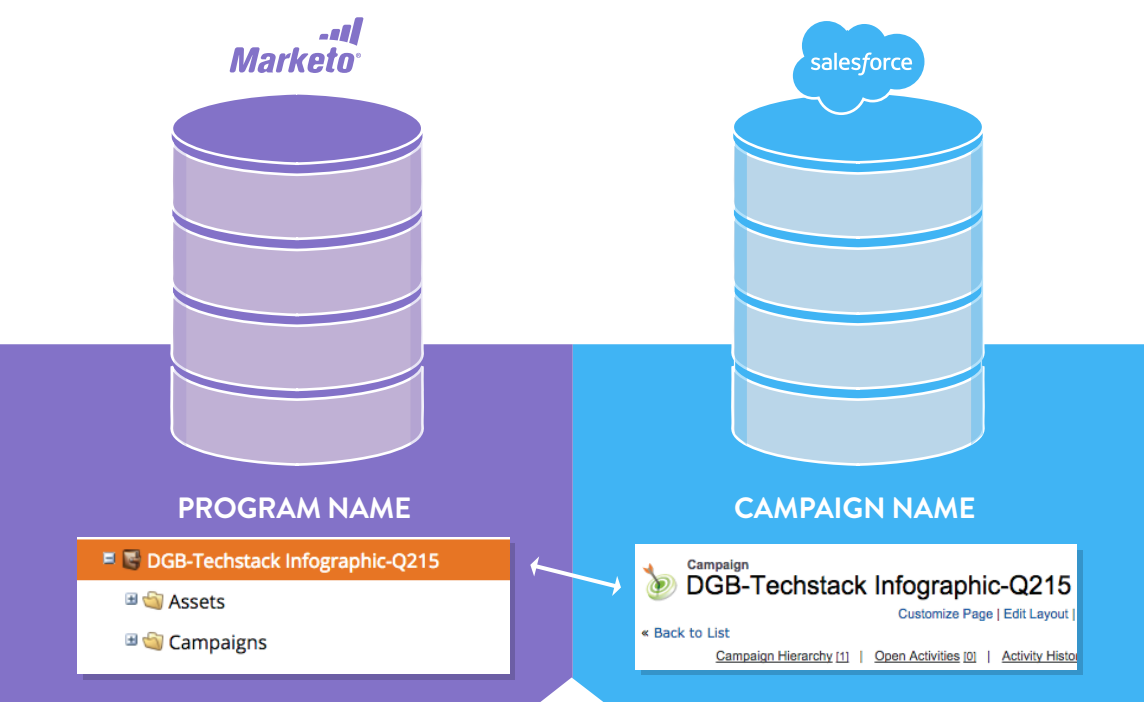# LeadMD

How a Marketo Program Syncs & Communicates With a Salesforce Campaign

Ever wonder how Marketo and SFDC sync up? Well, wonder no more! Here's the scoop on how data from a Marketo Program syncs directly to its SFDC Campaign counterpart.
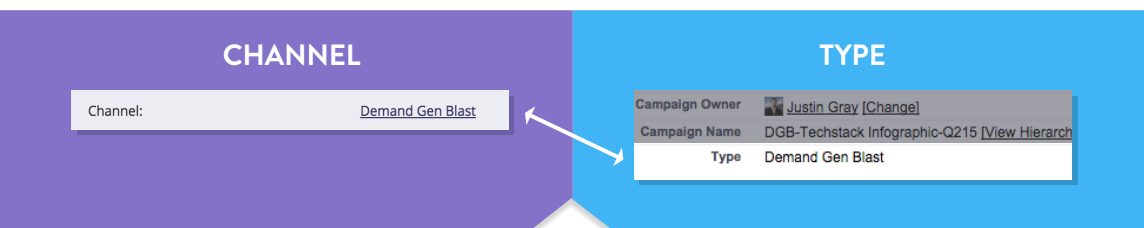
Marketo

salesforce

PROGRAM NAME

- DGB-Techstack Infographic-Q215
  - Assets
  - Campaigns

CAMPAIGN NAME

Campaign
DGB-Techstack Infographic-Q215
Customize Page | Edit Layout |
« Back to List
Campaign Hierarchy [1] | Open Activities | Activity Histo

Programs to **Campaigns**

Every marketing initiative starts somewhere. Where better to start than with a name? Ensure your naming convention maintains consistency across both Marketo and SFDC.
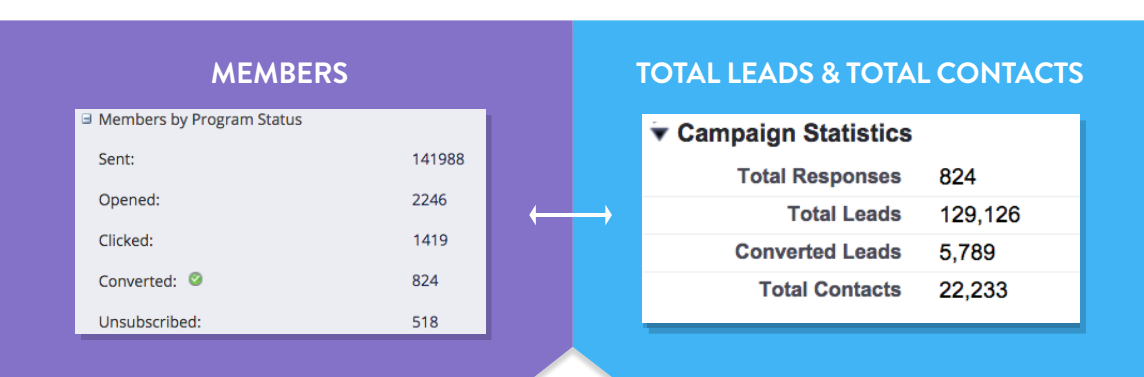
⚠ **Best practices alert!** Create the Marketo program first; then create the SFDC campaign directly from Marketo using the "Campaign Sync" functionality. If an SFDC campaign already exists, you can still sync them (just be sure the statuses and type are exactly the same).

CHANNEL

Channel: Demand Gen Blast

TYPE

Campaign Owner   Justin Gray [Change]
Campaign Name   DGB-Techstack Infographic-Q215 [View Hierarch
Type   Demand Gen Blast

Channel to **Type**

The "Channel" in Marketo and "Type" in SFDC defines the category that best describes your campaign. In our example, it's a demand gen blast. The names in the "Channel" and "Type" fields must be exactly the same for everything to properly sync.

MEMBERS

Members by Program Status
Sent:	141988
Opened:	2246
Clicked:	1419
Converted: ✓	824
Unsubscribed:	518

TOTAL LEADS & TOTAL CONTACTS

▼ Campaign Statistics
Total Responses	824
Total Leads	129,126
Converted Leads	5,789
Total Contacts	22,233

Members to **Leads/Contacts**

This area shows the individual leads that are part of your campaign. If you see a lower number of leads in SFDC than Marketo, don't freak out! It happens. Here are a few reasons why:

- Marketo campaign members don't have all the required fields required for creation in SFDC (typically company or last name)
- Marketo can't see leads/contacts in SFDC
- Oops! Some SFDC leads/contacts or Marketo members may have been deleted!
- If you're using a record type that's changed to a different type that Marketo can't see, a sync back to the specified ID won't be possible.
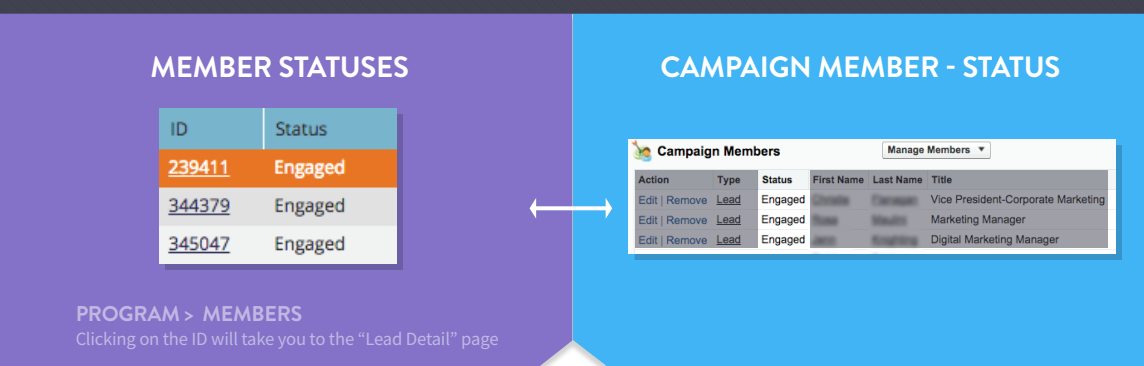
⚠ **Issues likes these happen sporadically.**

To stay in the loop, make sure you've signed up for error notifications.
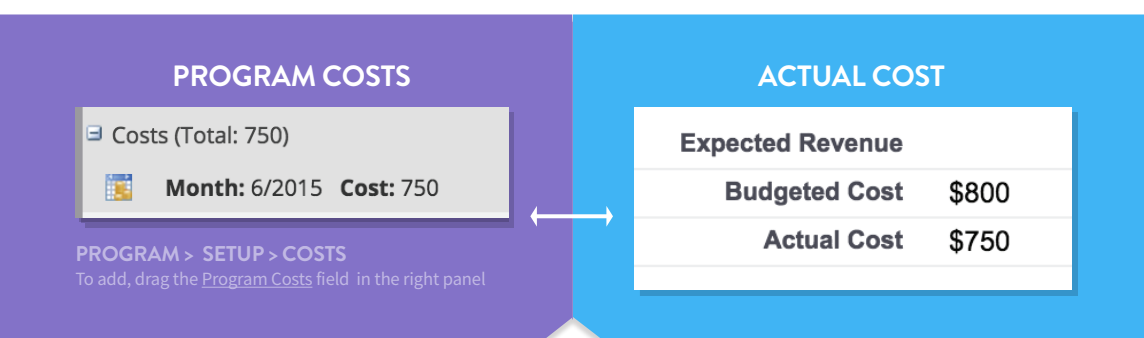
👍 PRO TIP

You can adjust Marketo to include defaults for certain fields in the "Admin" section. Just be smart about what you use for your defaults. For example, some day you may want to include "Last Name" & "Company" as Marketo tokens. You definitely don't want a situation where you send an email to Joe "No Last Name" at "Unknown" Company. That would be whack.

MEMBER STATUSES

ID	Status
239411	Engaged
344379	Engaged
345047	Engaged

PROGRAM > MEMBERS
Clicking on the ID will take you to the "Lead Detail" page

CAMPAIGN MEMBER - STATUS

Campaign Members   Manage Members ▼
Action	Type	Status	First Name	Last Name	Title
Edit	Remove	Lead	Engaged		Vice President-Corporate Marketing
Edit	Remove	Lead	Engaged		Marketing Manager
Edit	Remove	Lead	Engaged		Digital Marketing Manager

Member Status to **Campaign Member - Status**

While members won't appear in the exact same order, the actual list of members from a program/campaign will be the same, with the exception of the match-up issues we talked about in the last section.

PROGRAM COSTS

- Costs (Total: 750)
  - Month: 6/2015 Cost: 750

PROGRAM > SETUP > COSTS
To add, drag the Program Costs field in the right panel

ACTUAL COST

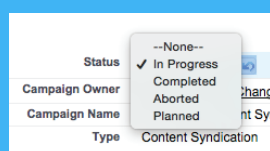|	
Expected Revenue	
Budgeted Cost	$800
Actual Cost	$750

Program Costs to **Actual Costs**

Finally, an easy one! Costs (the amount of money spent on your campaign) will always be the same in both SFDC and Marketo.

Whoa there buddy, not *everything* syncs!

There are several instances where Marketo Programs and Salesforce Campaigns don't share similar field information. Here are a few to be aware of:

"Schedule" event actions & **"Start/End Date"** inputs are only available within Marketo and do not sync to SFDC.

SFDC's **"Campaign Status"** is absent as a concept in Marketo.

---None---
✓ In Progress
Completed
Aborted
Planned
Content Syndication

Status
Campaign Owner
Campaign Name
Type

Active ✓   The **"Active"** checkbox also only exists in SFDC.

In SFDC, campaigns have definable **start** and **end** dates. These fields are used for campaign planning and are not found in Marketo.

▼ Planning
Start Date 10/19/2015
End Date   12/31/2015

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