Marketo GoToWebinar Adapter

User Guide Version 3.5

CONTENTS

EVENT INTEGRATION OVERVIEW

Connect Marketo to GoToWebinar and automate your events with our Event adapter. This adapter will allow you to manage your events, push registration information captured on a Marketo landing page to GoToWebinar, and pull attendance information automatically into a Marketo Event (which is a type of Marketo Program). This event capability allows you to capture the status of the leads as members of the event.

This guide assumes you are familiar with the building blocks and the recommended sequence for creating Events in Marketo. If you are unfamiliar with Marketo Events, please review the Event Overview in the Create & Manage an Event tutorial. This is a great place to start learning about Marketo Events.

The sections in this guide will step you through the process of creating a webinar in GoToWebinar, creating an event in Marketo, and associating them together. The graphic below depicts the integration process.
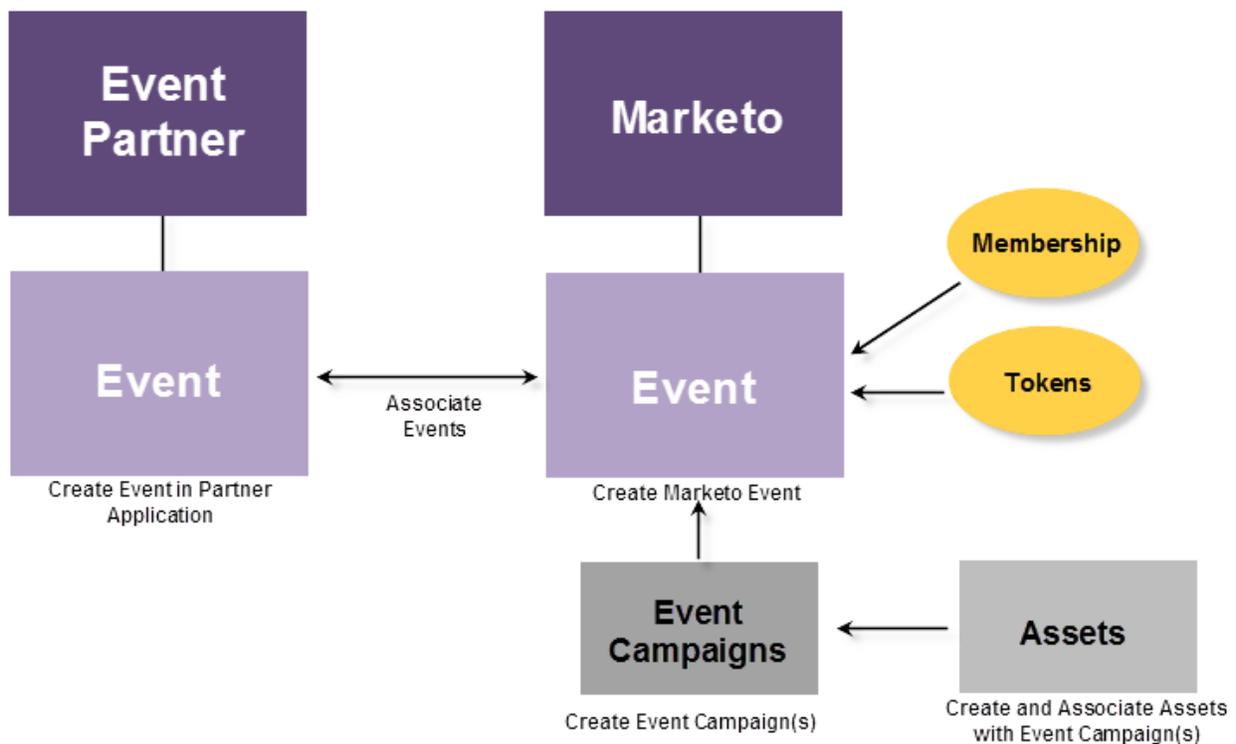
BEFORE YOU BEGIN

Before you connect Marketo to your Event Partner using our event adapter, you *must* have working knowledge of the following concepts in Marketo:

- Marketo [Programs](#) & [Events](#)
- [Channels](#)
- [Local Assets](#)
- [Child Campaigns & Progression Statuses](#)

NOTE: This document also refers to Marketo APIs; for more information, please refer to the [Marketo API documentation](#) in our community.

REQUIREMENTS

The following are requirements to take advantage of the Marketo GoToWebinar integration:

- **Subscription to GoToWebinar** – If you do not have a current subscription to Citrix GoToWebinar, please contact Citrix directly. Marketo is not a reseller of GoToWebinar. *NOTE: GoToMeeting and GoToTraining are not supported.*
- **GoToWebinar Connection Settings** – You will be required to enter the following information into Marketo to enable the integration:
  - **Email Address** – enter your GoToWebinar email address.
  - **Password** – enter the password that corresponds to your email address.
- **Registration Form** – Use of a **Marketo form** or use of a **non-Marketo form along with the proper [API](#)** to ensure registration data and lead information is passed to Marketo.
- A Registration Child campaign in your Marketo Event must be created and configured properly for your Event Partner integration to work.

HOW TO CREATE AN EVENT IN MARKETO WITH A GOTOWEBINAR INTEGRATION

There are a number of steps that must be followed to successfully connect your GoToWebinar with a Marketo Event. This guide assumes that you have working knowledge of Marketo Events, including how to create an Event, Child campaigns, and local assets. Here is the recommended sequence for building an Event using the GoToWebinar event adapter in Marketo:

- **Step 1:** Enter Your GoToWebinar Credentials in Marketo
- **Step 2:** Create an Event in GoToWebinar
- **Step 3:** Create Your Marketo Event
- **Step 4:** Configure Event Settings & Sync Marketo with Your GoToWebinar
  This is where you connect your Marketo Event with your GoToWebinar.
- **Step 5:** Create Your Child Campaigns and Local Assets
- **Step 6:** Test, Test, Test!

STEP 1: ENTER YOUR GOTOWEBINAR CREDENTIALS IN MARKETO

ENTER CREDENTIALS

Enter your GoToWebinar credentials.

1. Log into Marketo and navigate to the Admin area.
2. Click **Event Partners** in the tree, or from the canvas.
3. Under **Event Partner Actions**, click **New Event Partner**. The New Event Partner dialog box displays.
    a. **Display Name** – enter a display name for use in Marketo. For example, this could be your name or the name of your group if you share credentials.
    b. **Event Partner** – select GoToWebinar from the drop down box.

4. Click **Login to GoToWebinar** to launch the Authenticate with GoToWebinar dialog box.
    a. **Email Address** – enter the email address you use to log into GoToWebinar.
    b. **Password** – enter the password you use to log into GoToWebinar.
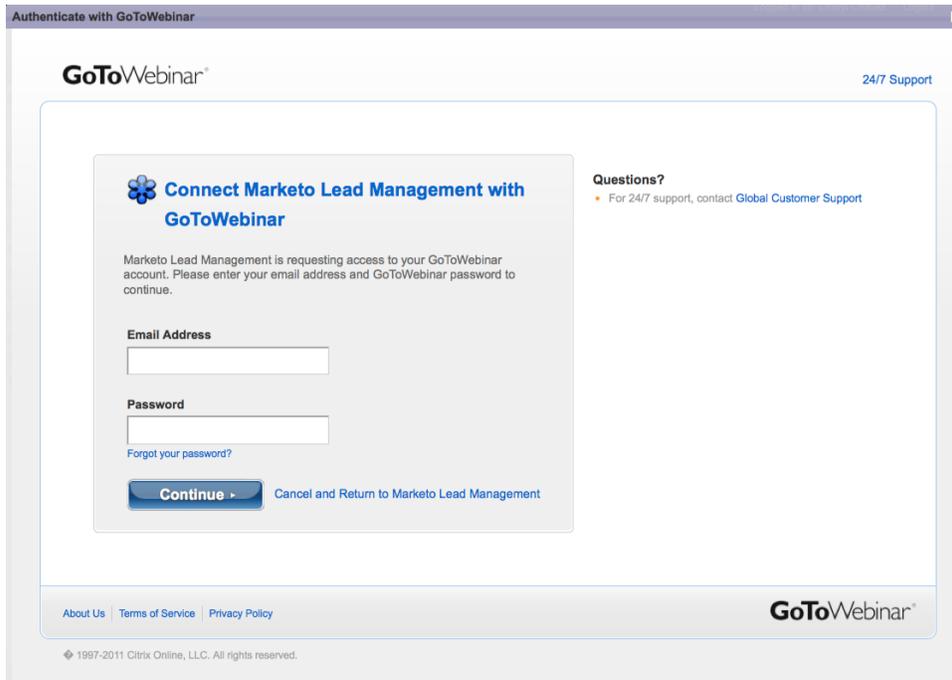
5. Click **Continue** to move to the next step in the authentication process, or click **Cancel and Return to "Event Name"** to close the dialog box and return to Marketo without authenticating your credentials.
6. Click **Allow** to confirm that Marketo may connect with your GoToWebinar account and return to the Marketo New Event Partner dialog box.
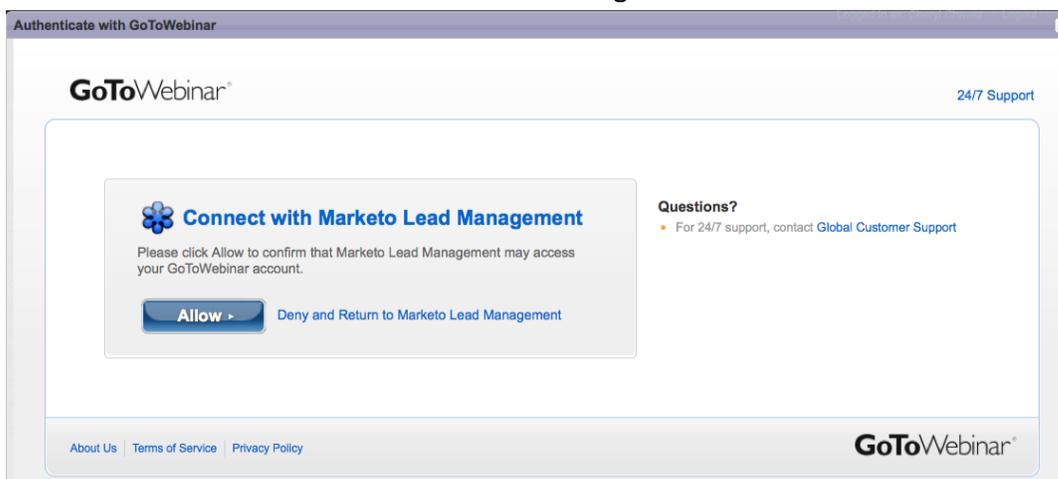
7. Click **Create** in order for Marketo to validate the credentials and save these Event Partner settings.

8. If the credentials are successfully validated, they will be added to the grid. If there is an error, you will not be able to save the credentials. The below figure is pointing to the icon that shows successfully added credentials

CAUTION: If you update your password in GoToWebinar, **YOU MUST** update your password in Marketo as well. If you do not, the integration will fail and you will see an error message in Event Partners.

EDIT A CREDENTIAL

If your password expires or you need to make a change to an existing credential, follow these steps:

1. Select the credential you wish to edit from the grid.
2. Under **Event Partner Actions**, select **Edit Event Partner**.
3. Update the information on the Edit Event Partner dialog.
4. Click **Save** to update the information, or click **Cancel** to close the window without saving the changes.

DELETE A CREDENTIAL

To remove a set of credentials from use within Marketo, follow these steps:

1. Select the credential you wish to delete from the grid.
2. Under **Event Partner Actions**, select **Delete Event Partner**.
3. Click **Delete** to remove the credentials, or click **Cancel** to cancel the request.

STEP 2: CREATE AN EVENT IN GOTOWEBINAR

First, create the webinar in GoToWebinar. Next, you will create a Marketo Event and associate the GoToWebinar with the Marketo Event, allowing the systems to pass registration and attendance information.

There are certain settings in the creation of your GoToWebinar used by Marketo and some that are only used by GoToWebinar. The following sections describe those settings.

SETTING USED BY MARKETO

The following is a list of settings that will be used by Marketo.

Title & Description:

- **Webinar Name** – enter the name for the webinar. This name will be viewable in Marketo.
- **Description (optional)** – enter the description for the webinar. The description will be viewable in Marketo.

Date & Time:

Enter the following information for your webinar and it will be pulled into Marketo via the adapter. If you make any changes to this information, you must click the link "Refresh from Webinar Provider" under Event Actions, in order for Marketo to see the changes.

- **Start date** – enter your start date. This will be viewable in Marketo.
- **Start time** – enter your start time. This will be viewable in Marketo.
- **End Time** – enter your end time. This will be viewable in Marketo.
- **Time Zone** – select the applicable time zone. It will be viewable in Marketo.
- **Recurs:** set to does not recur.

  NOTE: Marketo does not currently support recurring webinars. You must set up a one to one relationship between each Marketo Event and GoToWebinar webinar.

The following settings will reside in GoToWebinar only. They are not used by or viewable in Marketo, but they may be important for your Webinar.

- **Audio**
- **Co-Organizers & Panelists**
- **Branding and Theme**
- **Registration**

There are additional fields that you will configure in GoToWebinar that will NOT affect the integration. Please refer to your GoToWebinar User Guide for additional information on those fields, as they will not be covered in this guide.

STEP 3: CREATE YOUR MARKETO EVENT

CREATE AN EVENT IN MARKETO

A Marketo Event is a program that allows you to track the progression of your leads through the program. It will push registration information and pull attendance information using the GoToWebinar adapter. The Event will capture the status of your leads as they progress through the Event.
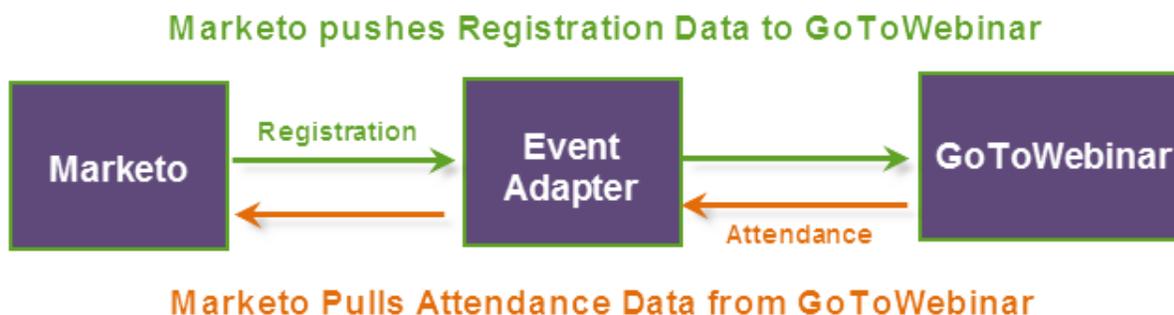
This guide does not discuss the details of creating an Event in Marketo but assumes you have working knowledge of the process. It does highlight specific requirements for a Marketo Event integrated with an Event Partner. For complete details on creating a Marketo Event, refer to the Create & Manage an Event tutorial in the Marketo Community.

When you create the Marketo Event, select "Webinar" as the Channel type. You can edit this channel in Admin, as well as create a new channel that can be used. If you choose to create a

new channel, it must be of the type "Event with Webinar" for the integration to work. For Marketo Admins who wish to know more about creating and managing channel types, refer to the Marketo Admin tutorial, Create Custom Channels & Tags.

STEP 4: CONFIGURE EVENT SETTINGS & SYNC MARKETO WITH YOUR GOTOWEBINAR

NOTE: It may take up to 15 minutes to sync your GoToWebinar with Marketo.

1. From the Marketing Activities tree, select the Event you wish to associate to a GoToWebinar webinar.
2. From the sub-menu, select **Event Actions** and then select **Event Settings** to launch the Event Setting dialog box.
   a. Select the Event Partner (e.g. GoToWebinar).
   b. Select the login account (e.g. the display name).
   c. Select the GoToWebinar webinar that you wish to associate with this Marketo Event.
      NOTE: Once you select the login account, we will pull in all webinars created under that account, however, it can take up to 15 minutes for the webinar to appear if it was just created in GoToWebinar.
3. Once the Event is selected, the start and end date/time, time zone and description (optional) will be displayed in Marketo.
4. Click **Save** to save the Event settings, click **Cancel** to go back.
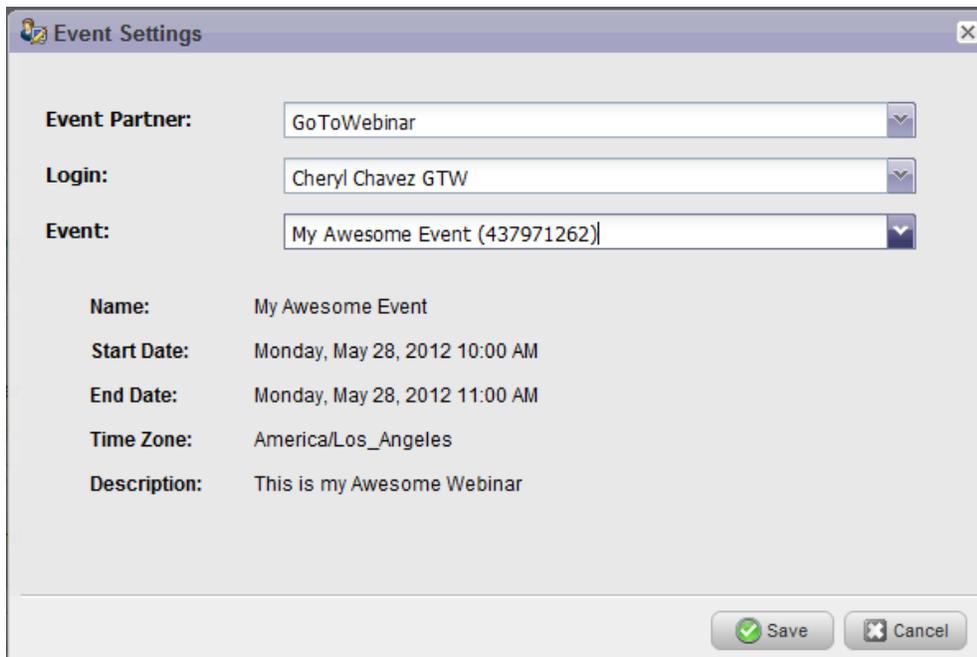
SETTING THE SCHEDULE

When setting up an Event that is associated with a GoToWebinar webinar, the Event schedule will populate with data from GoToWebinar.
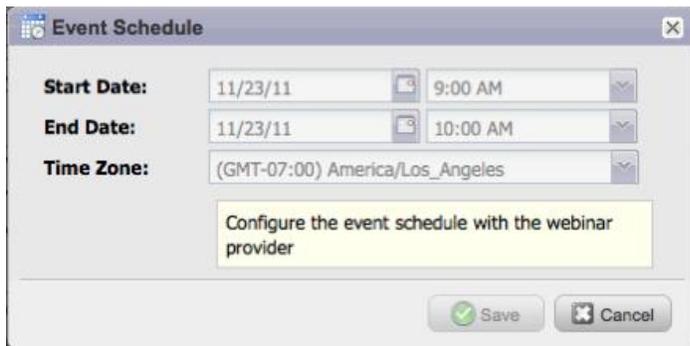
To access the Event Schedule dialog box:

1. From the Marketing Activities tree, select the Event.
2. From the sub-menu, select **Event Actions** and then select **Schedule** to launch the Event Schedule dialog box.

NOTE: If you update any Event information in GoToWebinar, you must click "Refresh from Webinar Provider" in the Event Actions menu to see the new data populate.

EVENT SUMMARY TAB

The Events summary tab is a read only tab that contains information about the Event, including a summary of the settings, the schedule, results, and members by progression status.

Settings

- **Event Partner** – will be set to GoToWebinar. You can update the Event settings by clicking the link.
- **Event Status** – information about the status of the Event. The following statuses will display:
  - *Scheduled Event* – Event is scheduled for a future date.
  - *Waiting for Attendee List* – Event end date has passed, but attendee list is not yet available.
  - *Event Complete* – Event has concluded and attendee list has been received.
  - *Attendee List Unavailable* – Event end date has passed and no attendee list is available.
- **Event Name** – name given to the Event when created in GoToWebinar.

- **Event Description** – description entered for the Event when created in GoToWebinar.
- **Event Number** – number given to the webinar when created in GoToWebinar.
- **Channel** – the channel specified when the Marketo Event was created.

☐ Settings

Event Partner:	GoToWebinar
Event Status:	Scheduled Event
Event Name:	Marketo Go To Webinar Integration
Event Description:	This is the customer webinar for the go to webinar integration.
Event Number:	798211822
Channel:	Webinar

Schedule

- **Start Date –** start date for the GoToWebinar webinar. Edit this date in GoToWebinar.
- **End Date -** end date for the GoToWebinar webinar. Edit this date in GoToWebinar.
- **Time Zone –** time zone selected when the GoToWebinar webinar was created. This is meant for display purposes only and can be edited in GoToWebinar.

☐ Schedule

Start Date:	Wednesday, Nov 16, 2011 10:00 am
End Date:	Wednesday, Nov 16, 2011 11:00 am
Time Zone:	America/Los_Angeles

Results

- **Total Members –** the number of leads who are members of the Event.
- **Acquired By –** the number of leads who were new or acquired by the Event.
- **Success –** the number of leads who reached the success criteria defined for the Event. This manual assumes you are using the pre-defined channel "Webinar." The success statuses are "attended" and "downloaded".

☐ Results

Total Members	100
Acquired By	0
Success ✅	4

Members by Progression Status

Leads actively listed in the membership grid of the Event are noted by their current progression status.

Members by Progression Status

Invited	87
Pending Approval	0
Wait Listed	0
Rejected	0
Registered	8
Attended ✅	4
No Show	1
Downloaded ✅	0

STEP 5: CREATE YOUR CHILD CAMPAIGNS AND LOCAL ASSETS

LOCAL ASSETS FOR YOUR EVENT

You will create the assets needed for your Event as either local assets or in the Design Studio as global assets.

For example, you may create a Marketo form, landing page, and email(s) for your Event. You have the option of using a Marketo or non-Marketo landing page for your Event, but the Registration form on the landing page *must* use a Marketo form to register your leads for the Event or a non-Marketo form with the proper API integration to push lead registration data to Marketo.

Please see articles on Local Assets for more information.

LANDING PAGE & FORM

To ensure that leads are properly registered with GoToWebinar, the following fields *must* be included in your Marketo form:

- First Name
- Last Name
- Email Address

With the proper flow action added to the registration campaign, the leads will get pushed to GoToWebinar and registered. You can add other fields to the form and the information will get captured in Marketo as part of the lead detail record.

CAUTION: You must use a Marketo form to register your leads for the Event or a non-Marketo form with the proper API integration to push lead registration data to Marketo. This is critical to the success of your Event Partner integration.

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EMAILS

You will create the emails to send for invitations, confirmation, follow-up and thank you using Marketo.

CONFIRMATION EMAIL

You can use Marketo to send out the confirmation email for your Event. When the lead registers, they receive a unique URL that they use to enter the Event.

TIP! To populate your confirmation email with this unique URL, use the following token in your email: **{{member.webinar url}}**

When the confirmation URL is sent out, this token automatically resolves to the lead's unique confirmation URL.

Reminder: Set the type of your confirmation email to Operational to ensure that people who register, even if they are unsubscribed, receive their confirmation information.

GOTOWEBINAR CONFIRMATION EMAIL

GoToWebinar can be configured to send out confirmation emails, if you prefer this option to sending the confirmation email out of Marketo.

Follow these steps in GoToWebinar:

1. Login in to GoToWebinar as an Organizer.
2. Click **My Webinars**.
3. Select **Email Notifications** for the webinar you would like to edit.
4. To send the confirmation email out of Marketo, uncheck the **auto-send confirmation email**.
5. To send the confirmation email out of GoToWebinar, leave **auto-send confirmation email** checked.
6. Click **Save Changes**.

CHILD CAMPAIGNS REQUIREMENTS

This guide assumes you have basic knowledge of Marketo Events and are familiar with creating Child campaigns.

Events contain one or more Child campaigns. These Child campaigns all work together to move leads through the progression statuses and enable you to track the performance of your Event.

Examples of Child campaigns you might create in your Event are an invite campaign, registration campaign, and follow-up campaigns.

CAUTION: The only "Required" Child campaign that must be created for your Event Partner integration to work is the **Registration** campaign. See the following section for complete details.

REGISTRATION CHILD CAMPAIGN REQUIREMENTS

You must use a Registration Child campaign in your Marketo Event in order for your Event Partner integration to work properly. The requirements when configuring the Child campaign are as follows:
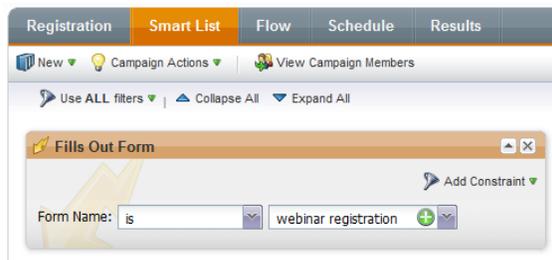
- **Registration/Confirmation (Trigger Campaign)**
  - **Smart List**
    - Trigger based on **Fills Out Form**. Be sure to include the landing page that the form lives on, by using Add Constraint, especially if the form is used on multiple landing pages.
      CAUTION: You must use a Marketo form to register your leads for the Event or a non-Marketo form with the proper API integration to push lead registration data to Marketo. This is critical to the success of your Event Partner integration.
      NOTE: If you are using a Marketo form on a non-Marketo landing page, your trigger will be Fills out Form with the Form Name


  - **Flow**

    - **Change Status in Progression** – set to Webinar -> Registered.
      CAUTION: This flow action is required when setting up your Child campaign. When a lead's progression status changes to registered, Marketo pushes the registration information to GoToWebinar.

    - **Send Email** – Confirmation Email (set to Operational so that unsubscribed leads that have registered receive it).
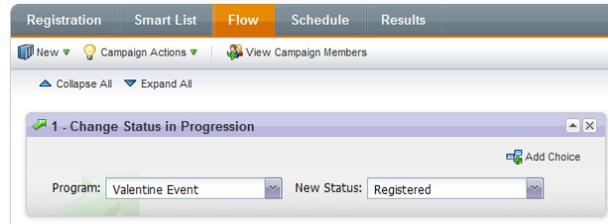
NOTE: If the lead is returned with a registration error, then they will not receive the email confirmation.

ADDITIONAL RESOURCES

- For a configured Marketo Event example, refer to Appendix A in this guide. Be sure to read the steps in this guide before you refer to the example.

- For tips on understanding Webinar Progressions, refer to Appendix B in this guide.

STEP 6: TEST, TEST, TEST!

RECOMMENDED TEST SEQUENCE BEFORE RUNNING YOUR FIRST CAMPAIGN

1. Fill out the Marketo Registration Form and use a valid email address to test.
2. Confirm the test name shows with a Registered status in the Membership grid of your Marketo Event.
3. Confirm the test name also shows as registered in GoToWebinar.
4. Confirm the valid email address you used to register the test name received a confirmation email to the Event and that the unique URL is resolved in the email.
   NOTE: You must use the **{{member.webinar url}}** in your confirmation email in order for the unique URL to show in each registrant's email.

PRACTICE SESSION

It is recommended that practice sessions (or starting and stopping the session) be run the day before, or at minimum, 8 hours before the actual session. This is to prevent inaccurate attendance information in Marketo.

AFTER THE EVENT

Here's how data is updated after the event takes place:

- It takes anywhere from 2 hours up to 2 days for Marketo to receive the attendance data from GoToWebinar.
- Once the attendance data syncs between Marketo and GoToWebinar, Marketo updates the membership grid with a status of Attended or Not Attended, and the Summary tab for the Event displays a status of Event Complete.
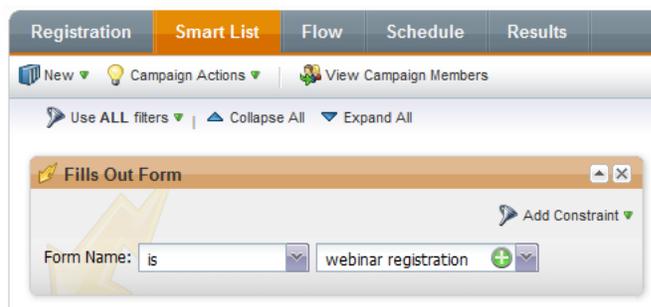
Here is a sample Event, including the campaigns for a GoToWebinar webinar. When you build your Event, be sure to test your campaigns before running them.

- **Create a new Event in Marketing Activities**.
    - Select **New** > **New Program.**
    - Select a **Campaign Folder** where the Event will live.
    - Enter a **Name** for the Event.
    - Select **Event** as the **Program Type.**
    - Select a **Webinar** as the **Channel** for the Event.
    - Click **Create.**

- **Invite (Batch Campaign)**
    - o Smart List – define whom you will invite to the Event.
    - o Flow
        - ▪ Send Email – if this is a local asset email, it will have the following naming convention – EventName.EmailName. Global emails can also be used.
        - ▪ Change Status in Progression – set to Webinar -> Invited
    - o Schedule – set the date for the invitation to be sent.

- **Registration/Confirmation (Trigger Campaign)**
    - o **Smart List**
        - ▪ Trigger based on **Fills Out Form**. Be sure to include the landing page that the form lives on, by using Add Constraint, especially if the form is used on multiple landing pages.
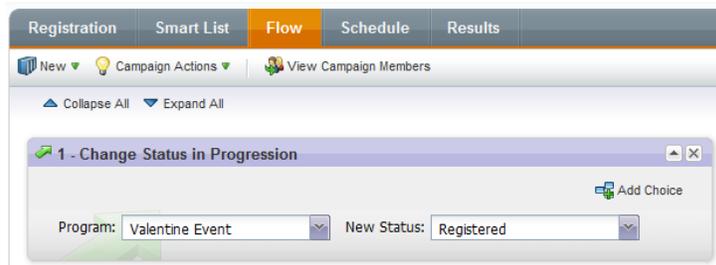
          CAUTION: You must use a Marketo form to register your leads for the Event or a non-Marketo form with the proper API integration to push lead registration data to Marketo. This is critical to the success of your Event Partner integration.

          NOTE: If you are using a Marketo form on a non-Marketo landing page, your trigger will be Fills out Form with the Form Name

- o **Flow**

    - ▪ **Change Status in Progression** – set to Webinar -> Registered.
      CAUTION: This flow action is required when setting up your Child campaign. When a lead's progression status changes to registered, Marketo pushes the registration information to GoToWebinar.

    - ▪ **Send Email** – Confirmation Email (set to Operational so that unsubscribed leads that have registered receive it).


      NOTE: If the lead is returned with a registration error, then they will not receive the email confirmation.

- **Reminder (Batch Campaign)**
    - o Smart List –filter using Member of Program and set the status to Registered.
    - o Flow – Send Email (Reminder Email).

    NOTE: You could have a similar campaign to send a different follow up email to those people who were invited but who have yet to register.

- **Follow-Up Campaign (Batch or Trigger Campaign)**

    - o Smart List – Trigger off change status in progression in the program
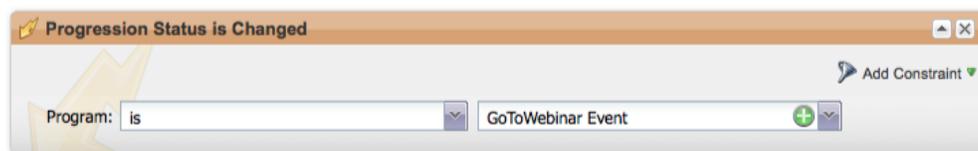

    - o Flow – Send Email
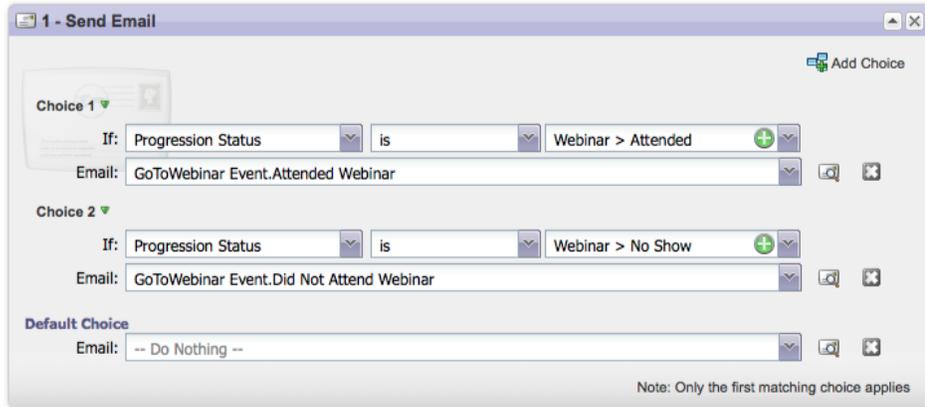
APPENDIX B: UNDERSTAND WEBINAR PROGRESSIONS

Progressions represent the different Event statuses that a lead will progress through as a member of the Event. See the article on Progressions for more information.   Progressions are associated to a Channel Type. Marketo has a built in Channel Type called Webinar. Statuses can be used in both batch and trigger campaigns.

Leads will move through progressions in a linear fashion and will not go back in status. For example, you won't have a lead that "attended" but then moved back to "registered".

Progression Status
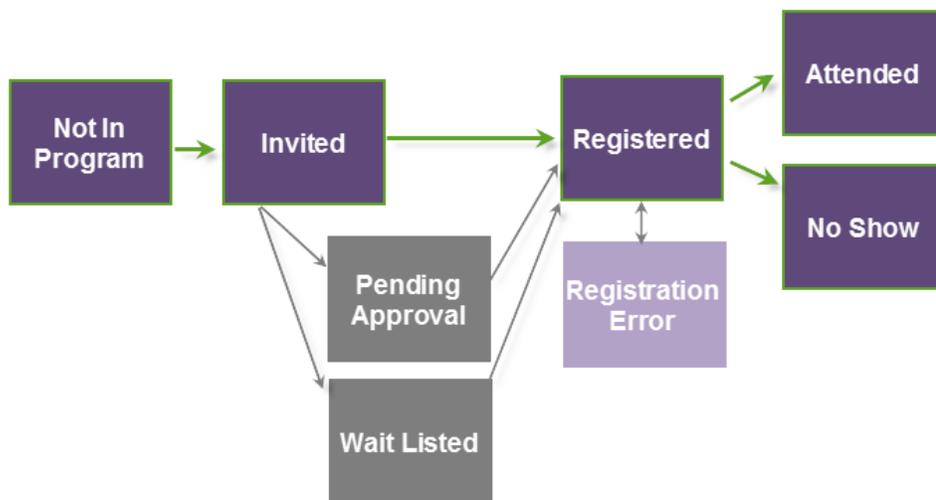
Here is a brief description of the progression statuses associated to the Webinar Channel.

- **Not in Program** – use this progression status to remove leads from the Event.
- **Invited** – use this progression status to add leads to the Event.
- **Pending Approval** – use this status if you wish to hold off on sending your leads a confirmation email. See "Manual approval of Registrants" for more information.
- **Wait Listed** – if you wish to keep some leads in a wait listed status until additional seats become available, use this status.
- **Rejected** – use this status when you wish to reject the registration of a lead to your Event.
- **Registered** – this progression status will push leads to GoToWebinar when you are using the GoToWebinar integration. The lead's status will be updated when we get a response back from GoToWebinar that the lead was successfully registered.
- **Registration Error** – the progression status reflects that the user encountered an error when trying to register for the Event.
  NOTE: If a Registration Error occurs, you can get additional information by looking at the activity log for that lead. Once the error is fixed, you can manually change the user's progression status to "Registered" within Marketo.
- **Attended** –at the conclusion of the webinar, GoToWebinar will return a list of leads who attended. This status will be pulled into Marketo automatically.

  NOTE: To manually update the statuses, please click "Refresh from Webinar Provider" under Event Actions.
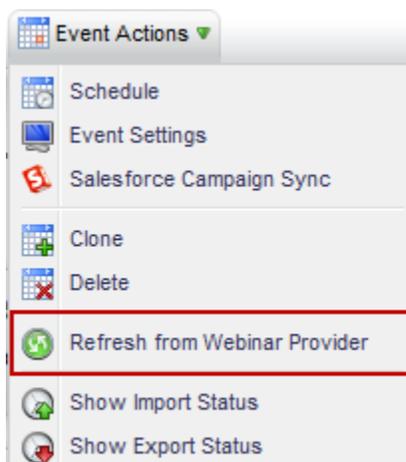
- **No Show** – at the conclusion of the webinar, and once attendance data is pulled in from GoToWebinar, the status of leads that registered but did not attend will be updated to No Show.

Note: It can take anywhere from 2 hours to 2 days for GoToWebinar to prepare the final attendance information and make it available in Marketo. To manually update the statuses, please click "Refresh from Webinar Provider" under Event Actions. Once the attendance is updated in Marketo, the Summary tab for the Event displays a status of Event Complete.

APPENDIX C: REGISTRATION UPDATES

MANUALLY APPROVING REGISTRANTS

It is possible to manually approve your registrants before sending them a confirmation email. To do so, you will need to configure your campaigns to handle this additional step:

- Registration Trigger Campaign
    - Smart List – Trigger off of Fills Out Form.
    - Flow – Change Status in Progression – set to Pending Approval.
- Go to the Event and click on the tab called "Members."
- From this tab you can see all the leads who have filled out the form, and their status should be set to Pending Approval.
- Use the filter at the top of the grid to view only the leads with status "Pending Approval."
- Select the leads that you wish to register (Shift, control, or Select All).
- From the menu, click Change Status and select either Registered or Rejected (or any other applicable status).

HANDLING LEADS WITH A REGISTRATION ERROR

If a lead ends up not being registered but rather set to the status "registration error," it is not too late to recover. From the Members tab, filter the list of leads with the status "registration error." Before continuing, make sure you have determined and fixed the issue with integration (check to make sure there are no errors under Event Partners in Admin).

Once the issue is resolved, select all the leads with the Registration Error status and change their status to Registered. This will try to register them again with GoToWebinar.

UPDATING MEMBER STATUS FROM GOTOWEBINAR

Marketo will automatically pull in the attendance information from GoToWebinar, at the conclusion of the Event. To manually update attendance information, please click "Refresh from Webinar Provider" under Event Actions.

For the latest and more information, visit the [Marketo Customer Community](). To give feedback on this User Guide, please send comments to [education@marketo.com]().