Marketo Lead Management Fundamentals

V. 2.0

Exercise Guide for Marketo's Introductory Training Course

Contents

Marketo Fundamentals 5

Get Started 5

Please Read: Prepare your Workspace BEFORE Class 5

Import a Test List of Leads 6

The Big Launch Webinar Training 6

Big Launch Webinar: Prepare Your Event 9

Leads, Smart Lists, Events, Digital Assets 9

Identify Audience 9

1. System Smart Lists 9

1.1. All Leads: Create a New Lead 9
1.2. All Leads: Lead Search 10
1.3. Unsubscribe a Lead 10
1.4. Marketing Suspended Leads 11
1.5. Bounced Email Addresses 11
1.6. Possible Duplicates 11
1.7. Blacklist 12

2. My Smart Lists 13

2.1: My Domain 13
2.2: Website Visits to Key Page 13
2.3: Key Industries 13
2.4: Competitors 14

3. My Smart Lists (Using Salesforce) 15

3.1 Salesforce Leads 15
3.2 Salesforce Contacts 15
3.3 Leads with an Opportunity Stage Open 15

4. Static Lists 16

4.1. Big Launch Webinar Invitees 16

© 2011 Marketo Proprietary and Confidential

4.2 Export a List to Create Your Own Template 17
5. Delete a Lead 17
6. Anonymous Leads 17
6.1 Anonymous Leads Smart List 17
6.2 Anonymous Leads Web Activity 18

Set Up Event 19

7. Create an Event 19
8. Assign Tags to the Event 21
9. Assign Costs to the Event 23

Create Assets 24

10. Add Images 25
11. Create Form 26
12. Create Landing Pages 28
13. Create Emails 31
13.1 Marketing Email 31
13.2 Auto-Response Email 32

Big Launch Webinar: Event Lifecycle 34

Outbound Marketing, Event Processing 34

Send Invite (Batch Filter Campaign) 34

14. Create Invitation Campaign 34

Thank-you (Trigger Campaign) 37

15. Create Trigger Auto-Response Campaign 37

Event Registration 38

16. Registration: Update Member Progression Status 38

Lead Lifecycle 40

17. Lead Scoring Campaigns 40
17.1. Visits Any Web Page 40
17.2. Clicks Link Any Email 42
17.3. Attends Webinar 42
18. Sync Lead Back to Sales 43

Re-invite and Reminder Campaigns 44

19. Re-invitation Campaign 44

© 2011 Marketo Proprietary and Confidential

20. Reminder Campaign 45

Big Launch Webinar: Event Launch & Review 46

Follow-ups, Reporting 46

Follow-up Campaigns 46

21. Thanks for Attending 46
22. Sorry We Missed You 47
23. Record Success: Downloaded 48
24. EXAMPLE: Nurturing Track 49

Reporting on the Webinar 50

25. Reports: Leads by Source 50
26. Reports: Program Performance Overview 50

Revenue Cycle Modeler: Visualize & Measure Lead Stage 51

Report on Lead Status 51

Build a Simple Revenue Model 51

27. Clone a Revenue Model: Success with Detours 52

Sample Revenue Models 52

Model 1: Leads Leap to Sales Accepted 52
Model 2: Filter out Rejects; Recycle and Re-Engage Lost Prospects and Customers 53

Resources 54

Marketo Customer Community 54

Resources Section on Marketo.com 54

© 2011 Marketo Proprietary and Confidential

Marketo Fundamentals

GET STARTED

Welcome to Marketo Lead Management! In this Fundamentals course you will learn how to use Marketo's many features to manage your marketing initiatives and generate quality sales leads.

The training theme is the ***Big Launch Webinar*.** Using this theme, the Fundamentals training program covers the Marketo activities and skills required to launch an event. Skills you learn in this training program will apply to many of the other activities that marketers commonly do, such as:

- segmenting and targeting your lead database
- building digital assets capture interest, respond to inquiries and follow-up
- setting up and managing event registrations
- creating a multi-stage outbound email marketing programs
- scoring lead actions and attributes then measuring results with analytics

This Lab Guide accompanies the Marketo Lead Management Fundamentals Course. Register to take the Live Fundamentals Course or view it on-demand in our Customer Community.

PLEASE READ: PREPARE YOUR WORKSPACE BEFORE CLASS

To get the most of this training, complete the following PRIOR to starting the Fundamentals course:

1. Be sure to use only the following **Internet Browsers**: Firefox 4, or Internet Explorer 9
2. Obtain a login to Marketo
3. Complete the setup steps for your Marketo App Install/Data synchronization, installation of Munchkin tracking code and CNAME. Log in to our Customer Community Knowledge Base for detailed instructions
4. Log in to Marketo and import the *MKTO Seed List.csv* (instructions below). We will use these fictitious lead records in our exercises.

© 2011 Marketo Proprietary and Confidential

IMPORT A TEST LIST OF LEADS

1. Save the file to your desktop; do not change the file name or alter the records
2. Log in to Marketo at https://app.marketo.com/
3. Navigate to the **Lead Database** section
4. **Click New > Import List**
    a. Browse and select *MKTO Seed List.csv*
    b. Format is "Comma Separated Values"
    c. If other settings are displayed, leave their settings as is
    d. Click Next
5. Marketo previews the file, and will alert you of any column headers that do not match by highlighting in red. Your file should be clear of discrepancies; click Next
6. On the next screen:
    a. For List Name enter: "MKTO Seed List"
    b. Revenue Stage: None
    c. Acquisition Program: None
    d. Click Import
7. A job status window will appear in the upper right-hand corner. While this list is processing, you may be asked to refresh your browser. Please refresh!
8. Upon completion, "MKTO Seed List" will now appear in the left-side Explorer tree under My Lists; click on the list name to view the leads.

NOTE: Please do not use this template for your future list imports of actual leads; you will instead use a custom template based on your own Marketo instance.

THE BIG LAUNCH WEBINAR TRAINING

The Marketo Fundamentals training follows the flow depicted in the **Big Launch Webinar** ribbon. You will work through the tasks required to build a complete, webinar for a big product launch, starting with identifying your audience, working through building the creative, event communications, managing registration, and doing follow-up and reporting-- all in Marketo.

The following exercises, along with the live or on-demand Marketo Lead Management Fundamentals course, will show you the entire Marketo application. This Big Launch Webinar story is intended to help you remember the details. There are three main phases, noted by the color changes in the ribbon:

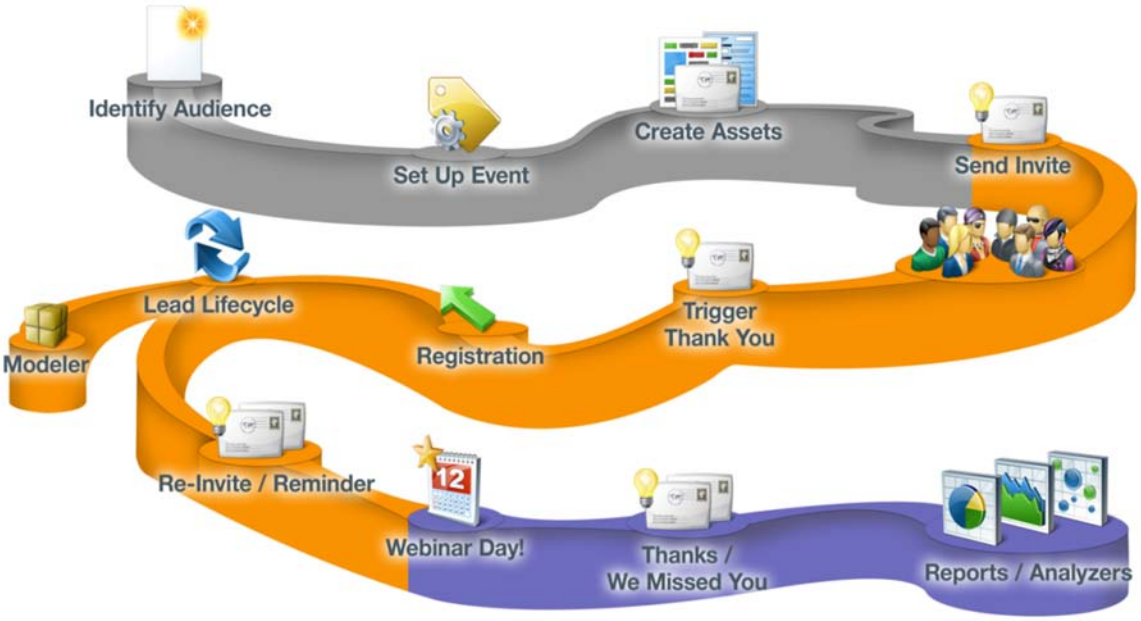
Gray: Prepare Your Event

Orange: Event Lifecycle

Purple: Event Launch and Review

© 2011 Marketo Proprietary and Confidential

Big Launch Webinar



Prepare Your Event	
1. Identify Audience: Who to Invite?	• Target and segment leads • Manage data and duplication
2. Set Up the Event:	• Events and a programs are very similar in Marketo: this section teaches fundamentals you can apply across all marketing initiatives • Create an Event; add Costs and Tags for reporting purposes
3. Build and Manage Creative Assets:	• Images • Forms • Landing pages • Emails

© 2011 Marketo Proprietary and Confidential

Event Lifecycle	
4. Send an Invite	• Learn to use Marketo Smart Campaigns: the building blocks for all Marketo functions. • Filter Campaigns – what are they, when to use them
5. Trigger a Thank You	• Use Marketo to react automatically to lead activity with a Trigger Smart Campaign.
6. Register Attendees: Status & Reporting	• Manage registration status • Create detailed reports
7. Lead Lifecycle	• When is a lead marketing qualified or Sales ready? Use Marketo to deliver leads to the sales team using scoring and lead status
8. Revenue Modeler	• Visualize your lead lifecycle and your entire business process with Revenue Cycle Modeler.
9. Reminders	• Schedule and launch a reminder to registrants, and re-invite those who have not yet registered.

Event Launch and Review	
10. Day of Webinar	• Work with webinar partner to update attendance status for the event.
11. Thank you Follow-up	• Send a post-event follow-up to attendees and no-shows • Place attendees into a drip nurturing program.
12. Reports & Analysis	• Analyze and report on lead actions, including anonymous web activity • Do lead drill-down and create charts to see the results of marketing activities.

© 2011 Marketo Proprietary and Confidential

Big Launch Webinar: Prepare Your Event

LEADS, SMART LISTS, EVENTS, DIGITAL ASSETS

In this section, you will learn to select and segment leads, build smart lists, and build forms, landing pages and emails.

Get Started: Navigate to the Lead Database section of Marketo.

IDENTIFY AUDIENCE

1. SYSTEM SMART LISTS

1.1. All Leads: Create a New Lead

An email address is all that is required to create a new known lead in Marketo. Create the following new lead record:

1. **New Menu > New Lead**
2. Enter in your own Name and Email information
3. Click Enter.

Your lead record is now in Marketo.

Repeat these steps to create any additional lead records for colleagues you wish to include as recipients for your later email exercises.

© 2011 Marketo Proprietary and Confidential

1.2. All Leads: Lead Search

You can search for lead(s) by name, email, title, or company using the dedicated Lead Search box

1. Click on Lead Database to return to the starting page
2. In the search box, enter any of the values you provided for your own lead record
3. Click Enter.

Your lead record should appear.

1.3. Unsubscribe a Lead

Leads have the option to unsubscribe from any of your marketing communications, and will appear in your Unsubscribed System Smart List. If you are a new Marketo customer you may already have leads in this list from if they were unsubscribed in your Sales CRM.

You can add or remove any lead to the unsubscribed list using Single Flow action.

We will add a test record to the Unsubscribed List:

1. **New > New Lead**
2. Create a new lead, this time with test information
    a. First Name = Marketo
    b. Last Name = Training
    c. Email = MarketoTraining@test.com
3. Locate this lead using Lead Search
4. Click on the lead to highlight the record
5. **Lead Actions > Flow Actions > Change Data Value**
    a. Select Unsubscribed
    b. Change Value to be “True”
    c. Click Run Now
6. When the Flow Step is complete an indicator will appear
7. Click on the Unsubscribed Leads list to see the Test record.

We’ll use this Test record for several more exercises below.

© 2011 Marketo Proprietary and Confidential

1.4. Marketing Suspended Leads

You can set any Lead to be Marketing Suspended, and they will not receive your marketing emails. This is an ideal setting for leads entering in negotiations with your Sales team so that your communications do not pose any conflict.

1. Click on your Test lead record to highlight
2. **Lead Actions > Flow Actions > Change Data Value**
    a. Select Suspended
    b. Change Value to be "True"
    c. Click Run Now
3. When the Flow Step is complete an indicator will appear
4. Click on the Marketing Suspended list to see the Test record.

1.5. Bounced Email Addresses

Email Addresses that experience a hard bounce are automatically set in Marketo with an Email Invalid status. They are usually 'junk' leads that you may want to consider deleting.

1. Click on your Test lead record to highlight
2. **Lead Actions > Flow Actions > Change Data Value**
    a. Select Email Invalid
    b. Change Value to be "1"
    c. Click Run Now
3. When the Flow Step is complete an indicator will appear
4. Click on the Bounced Email Addresses list to see the Test record.

1.6. Possible Duplicates

Duplicates are identified by matching email addresses. You can easily merge multiple records for a Lead in Marketo; you will be prompted to reconcile any fields with conflicting information.

1. Create another lead record for MarketoTraining@test.com
2. Navigate to Possible Duplicates List
3. Click on both records to highlight using the Shift key
4. Click on Merge Leads
5. Click on Merge
6. Leads will disappear from this list.

© 2011 Marketo Proprietary and Confidential

1.7. Blacklist

You can set any Lead to be blacklisted from all communications. This is an ideal setting for your competitors.

1. Locate your Test lead using Lead Search
2. Click on the lead to highlight the record
3. **Lead Actions > Flow Actions > Change Data Value**
    a. Select Black Listed
    b. Change Value to be “True”
    c. Click Run Now
4. When the Flow Step is complete an indicator will appear
5. Click on the Blacklisted Leads list to see the Test record.

© 2011 Marketo Proprietary and Confidential

2. MY SMART LISTS

You can create your own tailored Smart Lists to contain 1 or more filters, arranged with the logic you need to achieve desired results. Use any data field or lead activity in your Marketo instance as a Filter.

To create ANY Smart List in Marketo:

1. **New > New Smart List** OR right-click on **My Smart Lists > New Smart List**
    a. You may also right-click on any existing Smart List to clone it as a starting point
2. Drag in Filter(s) from the Palette to the Canvas; use the Filter Search box to find Filters by keyword
3. Click on the name of Smart List to view the results.

2.1: My Domain

See which colleagues are in your database.

1. Drag in **Email Address**
    a. set operator to "contains"
    b. type in your domain with the @ sign, such as "@marketo.com"

2.2: Website Visits to Key Page

See which Leads have been active on one of the pages where you have placed your Munchkin code.

1. Drag in **Visited Web Page**
    a. Click on Add Constraint
    b. select Web Page constraint
2. Select one of your tracked pages from the drop list.

2.3: Key Industries

A Key Industry Smart List lets you target key leads for your marketing efforts. Below are sample industries; select your own key industries if desired.

1. Drag in **Industry** Filter (under Lead Attributes)
2. Click the "+" sign to add multiple values; a popup will appear
    a. Select Healthcare from the drop list and move to the right window by clicking Add; or type it into the right-side box
    b. Select Technology from the drop list and move to the right window; or type it into the right-side box
    c. Click OK.

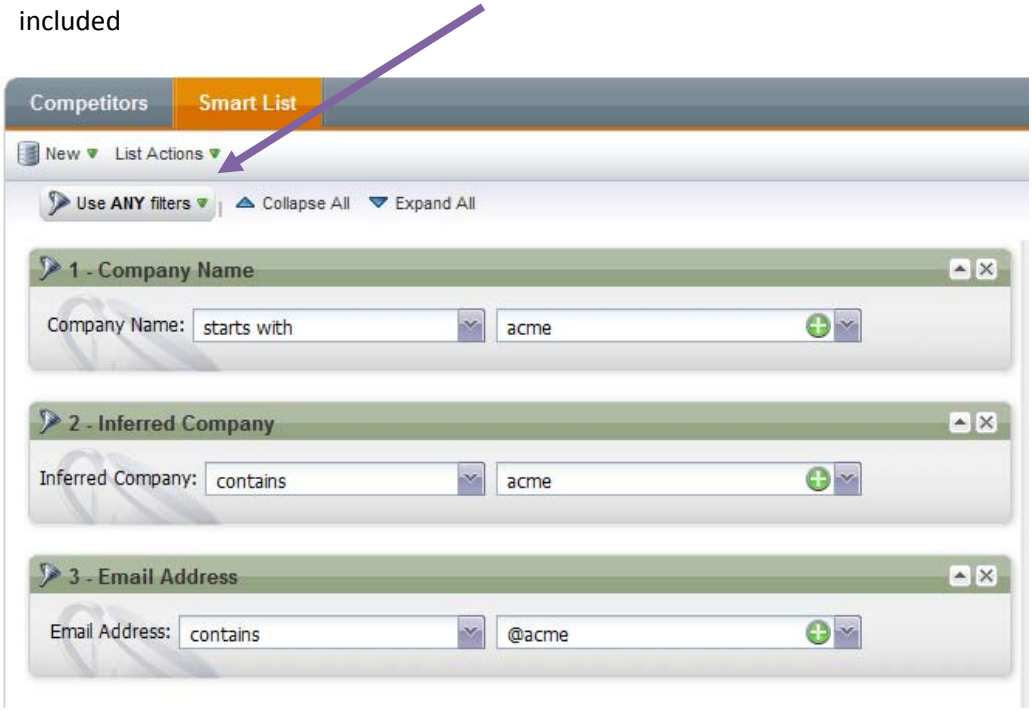
© 2011 Marketo Proprietary and Confidential

2.4: Competitors

Identify potential competitors so that you can add them to the Blacklist if necessary. Often they will have entered their corporate information to enter your database!

For this exercise, we are searching for the competitor named ***Acme Corp;*** your Smart List can include multiple competitors:

1. Drag in 3 Filters: **Company Name, Inferred Company**, and **Email Address**
2. For the Company-related Filters, search for exact Company names by leaving the operator to "is"; expand the search by changing the operator to "starts with" or "contains"
3. For the Email Address, select operator "contains" and write in "@acme.com". This will pick up any corporate email address
4. Change the filtering to **Use Any Filter** so that a lead only needs to meet one Filter criteria to be included



BEST PRACTICE

- If creating a Competitor list for the purposes of sending to the Blacklists, do NOT include Inferred Company as a Filter.

© 2011 Marketo Proprietary and Confidential

3. MY SMART LISTS (USING SALESFORCE)

You can create your own tailored Smart Lists to contain 1 or more filters, arranged with the logic you need to achieve desired results. Use any data field or lead activity in your Marketo instance as a Filter.

To create ANY Smart List:

1. **New > New Smart List** OR right-click on **My Smart Lists > New Smart List**
    a. You may also right-click on any existing Smart List to clone it as a starting point
2. Drag in Filter(s) from the Palette to the Canvas; use the Filter Search box to find Filters by keyword
3. Click on the name of Smart List to view the results.

3.1 Salesforce Leads

1. Search for "SFDC"
2. Drag **SFDC Type** into the Canvas; set the value to = Lead

3.2 Salesforce Contacts

1. Right-click on the Salesforce Leads to clone
2. Change **SFDC Type** to = Contact

3.3 Leads with an Opportunity Stage Open

1. Right-click to clone the Salesforce Leads Smart List
2. Add a second Filter, **Has Opportunity**
    a. Set Value to be "true" or "is any"
    b. Click to add a Constraint, Stage
    c. Set Stage value to "Open"

© 2011 Marketo Proprietary and Confidential

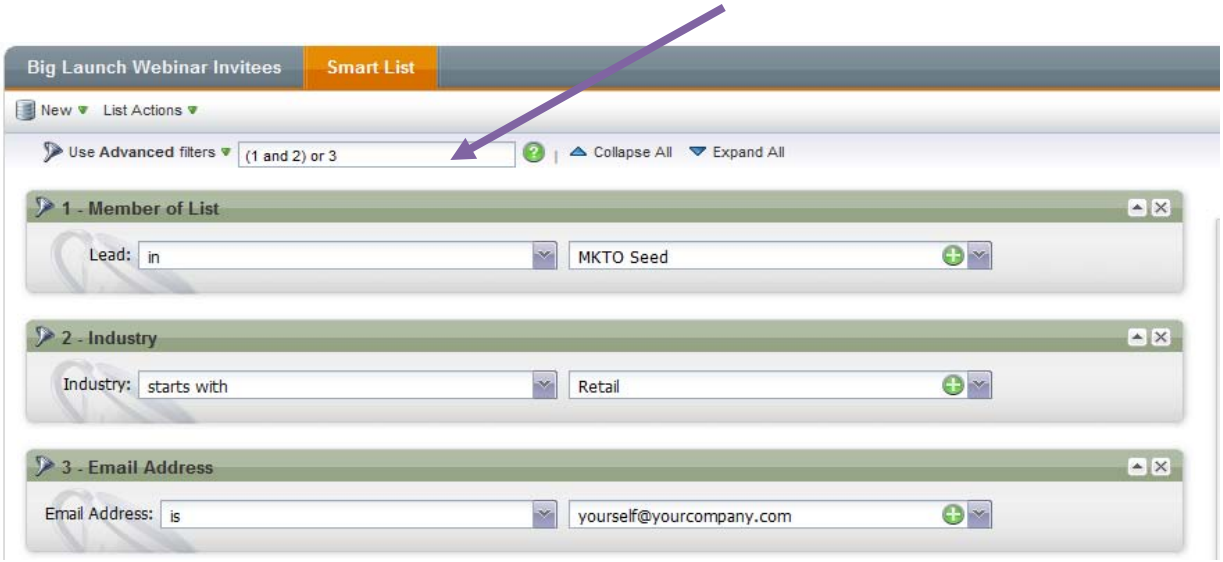
4. STATIC LISTS

Static Lists differ from Smart Lists in that they do NOT contain filters. You create a Static List every time you import a list of leads into Marketo. You can segment your Static Lists by placing it into a Smart List and adding Filter(s).

4.1. Big Launch Webinar Invitees

You're going to invite leads from your list import who are also in the Retail Industry. You'll then add yourself to the filters so you'll also be part of the Smart List.

1. Create a new Smart List, "Big Launch Webinar Invitees"
2. Drag in **Member of List** (NOT Member of Smart List)
    a. Select the MKTO Seed List
3. Search for Industry in the Palette: drag in **Industry** (found under Company Attributes)
    a. Select the operator to read "starts with"
    b. Type in "Retail"
4. Drag in **Email Address**
    a. Set to "is" and type in the email address you entered for your own record—if you see a red line, that indicates your email address is NOT recognized in the Lead Database
5. Set Filters to Use Advanced Filters; a box will appear with numbers for the Filters
    a. Set the box to read: **(1 and 2) or 3**



You should have a result of 304 leads in the Smart List. You've now identified your Audience for the Big Launch Webinar!

© 2011 Marketo Proprietary and Confidential

4.2 Export a List to Create Your Own Template

When it comes time to import any of your actual leads into Marketo, you'll need to work off a template of all the fields in your Marketo instance. The easiest way to create a Template is by exporting a list from the Lead Database that will include ALL the Columns.

1. Click to select a small Smart List, such as "My Domain"
2. Click on List **Actions > Export List**, or click on the small Excel icon at the bottom of the list
3. Select to export "All Columns"
4. Save to your desktop.

5. DELETE A LEAD

Deleting a known lead in Marketo always gives you the option to save or delete the lead from Salesforce.com if it exists there.

1. Find your Test lead record
2. Highlight the record and click Delete Lead
3. SFDC option will appear; "True" setting will also remove the lead from SFDC
4. Click Run now

Once complete, the Lead no longer exists in Marketo.

6. ANONYMOUS LEADS

Marketo tracks Anonymous lead behavior taking place on all your website pages where you place the Munchkin tracking code, providing you with insight and lead history that remains on file when they do become a Known lead.

6.1 Anonymous Leads Smart List

In the Lead Database section:

1. Create new Smart List, "Anonymous";
    a. Filter: Is Anonymous = True
2. Clicking on Smart List name will display records with no name

© 2011 Marketo Proprietary and Confidential

6.2 Anonymous Leads Web Activity

In the Analytics section:

1. Click on Web Activity report
2. On the Smart List tab, drag in Filter: Member of Smart List
3. Select the Anonymous List
4. Click on Report to see the results
5. Click on Smart List tab and remove Filter.

© 2011 Marketo Proprietary and Confidential

SET UP EVENT

Marketo Events are like Marketo Programs, but are defined by occurring on a scheduled date and time. If it is an online event such as a Webinar, you may also integrate a Marketo Event with your WebEx Events. ***WebEx Event customers: please be sure to review our guide on integrating and using WebEx with your Marketo Webinar Events*.**

Get Started: Navigate to the Marketing Activities section of Marketo.

You need to place all your Programs and Events into Folders.

7. CREATE AN EVENT

Create a Folder and two sub- Folders now to use for the remainder of the Fundamentals Course exercises:

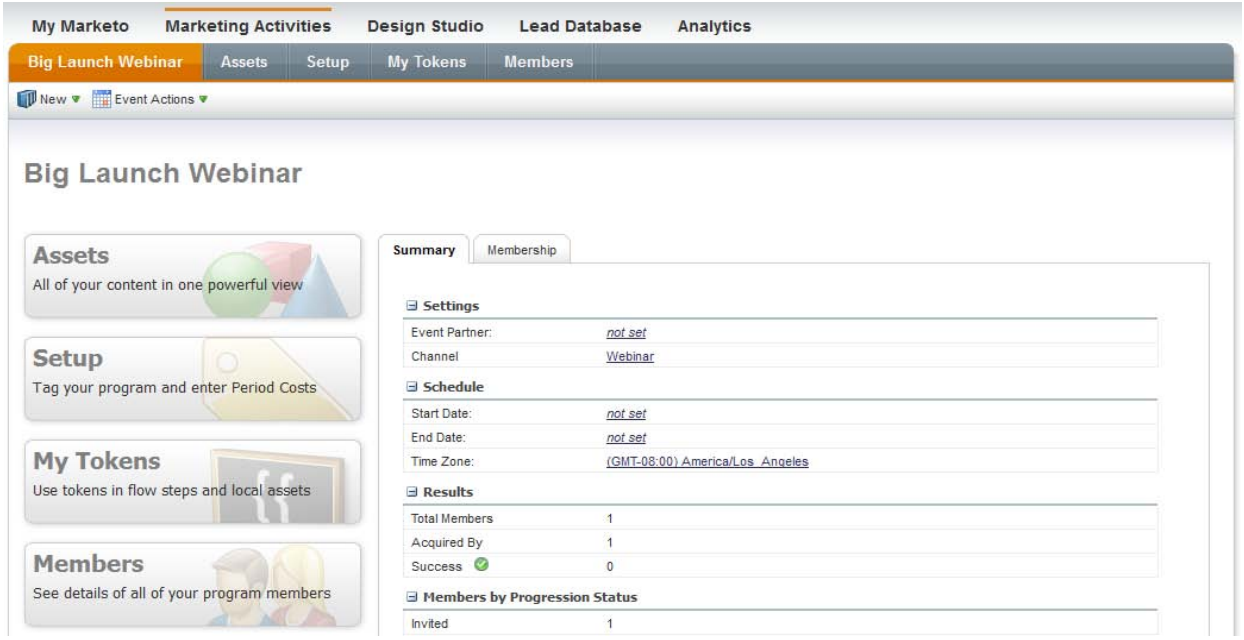
1. Right-click on Marketing Activities, or click **New > New Campaign Folder**
    a. Call it "MKTO Training"
2. Right-click on MKTO Training and select New Campaign Folder
    a. Call it "MKTO Events"

These Folders should appear in the Explorer tree.

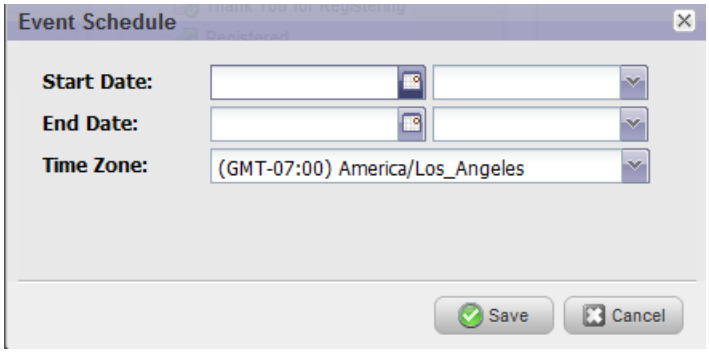
Create a new Event for the Big Launch Webinar:

1. Select either **New > New Event**, or right-click on the Events folder in the Tree to select a New Event (this will place it automatically in the folder)
1. In the pop-up window, enter the initial Event information:
    a. Name of Webinar: Big Launch Webinar
    b. Channel: Webinar
    c. Click Create
2. You'll now see the Event Summary in the Canvas:

© 2011 Marketo Proprietary and Confidential



3. Select **Event Actions > Schedule** to set the date/time of the webinar to take place next month



Move on to the Event's Setup tab to assign Tags and Costs for the Webinar.

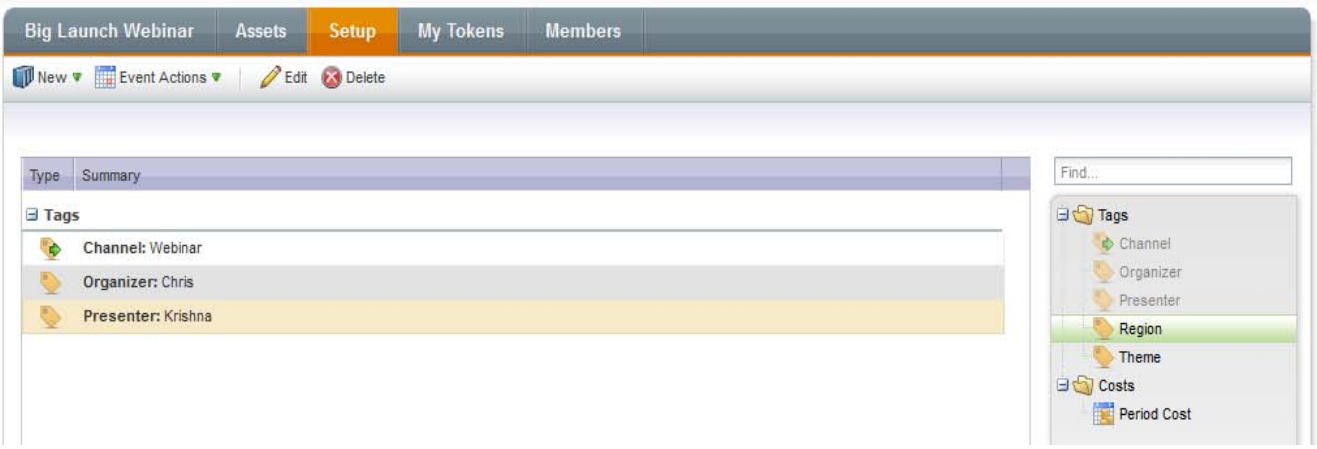
© 2011 Marketo Proprietary and Confidential

8. ASSIGN TAGS TO THE EVENT

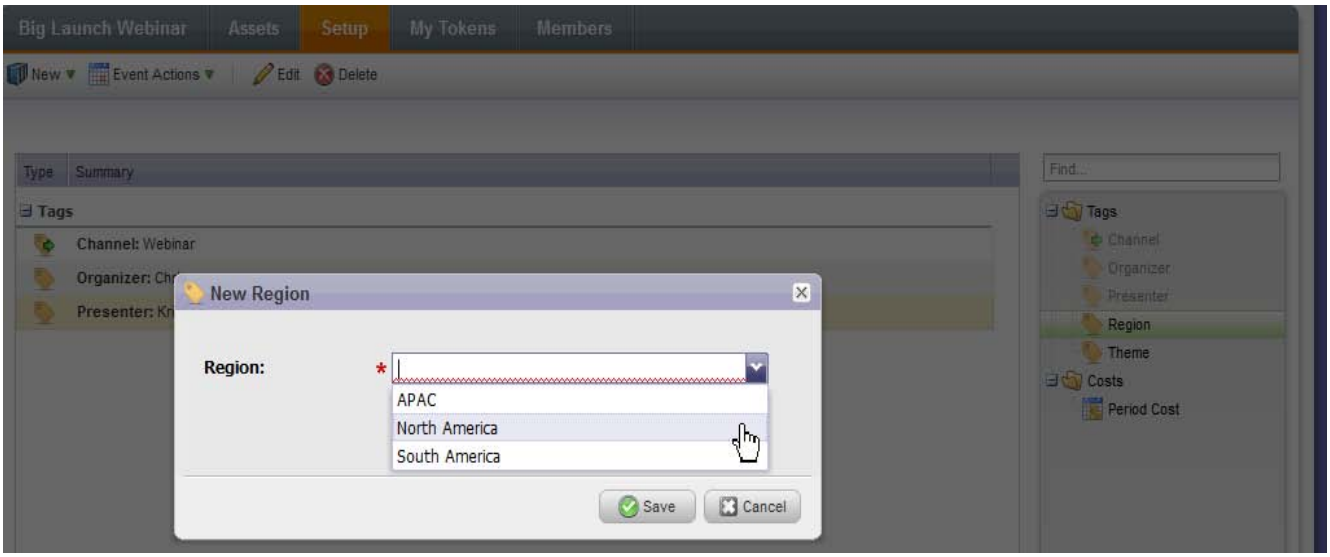
Each Program or Event can have Tags (descriptors) associated with it. These Tags are important to your reporting efforts. All Programs and Events have a Channel Tag Type you must assign when you first create it; for the Big Launch Webinar, we assigned the Channel Tag Value to be "Webinar. "

Your Marketo account has been seeded with the Channel Tag Type and ten Channel values. Your Marketo Administrator can create additional Tag Types and values in the Admin section of your instance; create as needed for your marketing initiatives. These can be set as optional or required to associate with your Programs and Events.

EXAMPLE ONLY: Here we have several tags created for use; we will add the Region Tag Type from the palette to identify the marketing region for our Big Launch Webinar. This exercise is for informational purposes only.

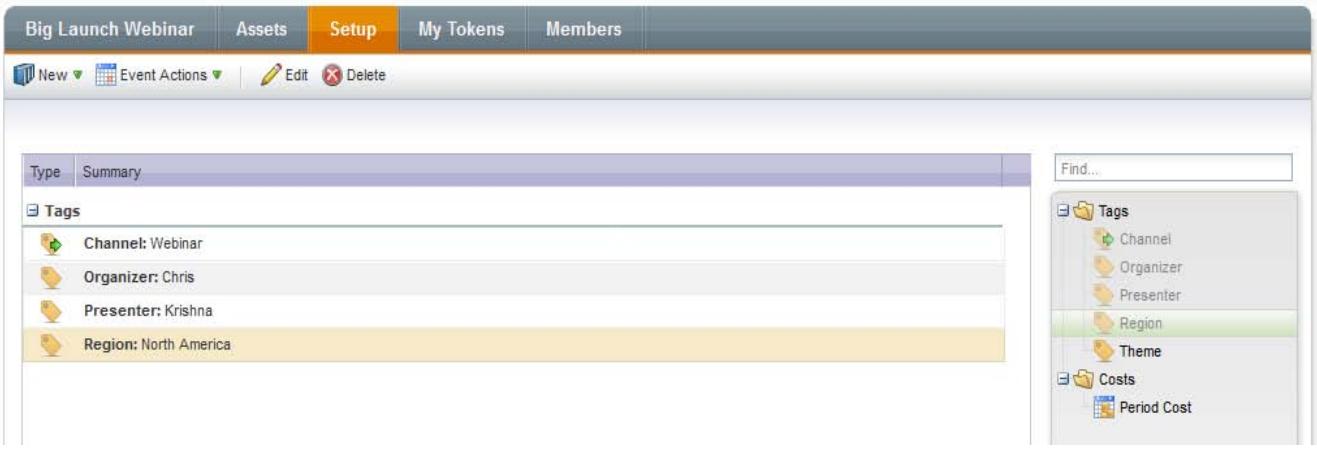


1. Click on Region Tag and drag to the Canvas
2. In the pop-up window, select the desired value for the Tag; click Save



© 2011 Marketo Proprietary and Confidential

3. The Region Tag is now associated with the Event, and it is grayed out on the palette.



4. Right-click on any Tag to edit or delete from the canvas.

© 2011 Marketo Proprietary and Confidential

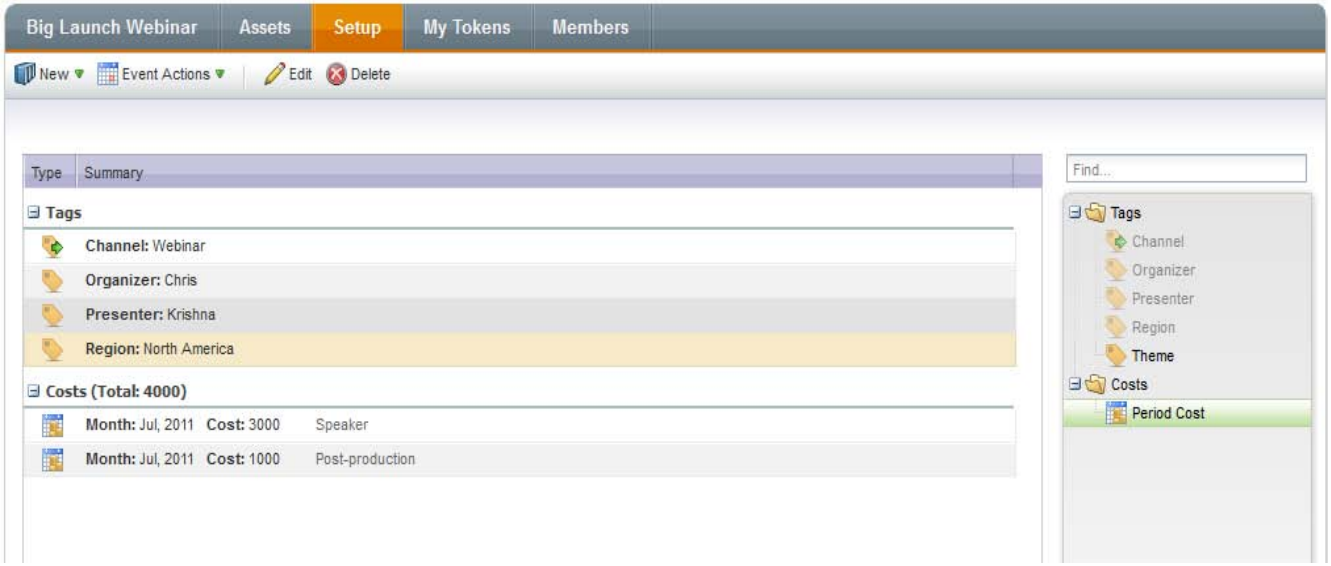
9. ASSIGN COSTS TO THE EVENT

Assigning costs will also serve you in analyzing your Program and Event success. Track any costs you choose; you can enter costs running over several months, and also itemize multiple costs for a single month. The currency denomination is set by your Marketo administrator.

When preparing your reporting, any new names acquired by the Program or Event are associated with the nearest Program Cost month you have entered.

Add two costs for the Big Launch Webinar for the current month: $3000 for the speaker, and $1000 for the post-production of the Webinar recording.

1. In the Event Setup Tab, drag the Period Cost into the canvas
2. In the pop-up window, enter the amount and description for the webinar speaker, and click Save
3. Repeat steps 1 and 2 to add the cost of post-production
4. The Canvas will now display both costs, below the Tag section



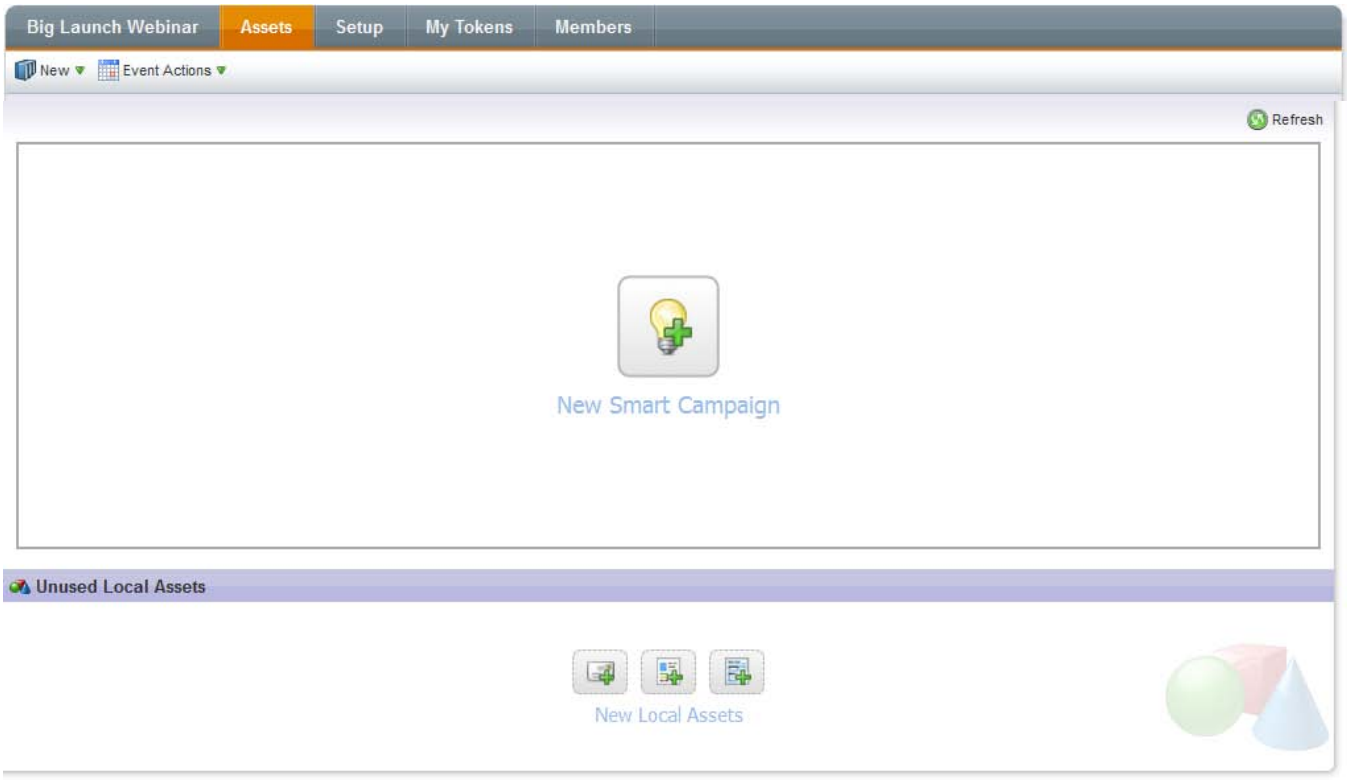
© 2011 Marketo Proprietary and Confidential

CREATE ASSETS

The following exercises are conducted in the Marketing Activities section of Marketo.

The Canvas is your workspace to create the desired Local Assets of a Program or Event. When you create a new Program or Event the Assets tab will be blank, allowing you to create the digital components of your Event:

- Forms
- Landing Pages
- Emails



The only exception is the images/files you would like to include in your Event; you'll need to navigate outside the Event, to the Design Studio section, to upload them into Marketo.

© 2011 Marketo Proprietary and Confidential

10. ADD IMAGES

For this exercise only: please navigate to Marketo's Design Studio.

You can store any image or file assets in Marketo. Images and files of any format can be uploaded, with a size limit of 40 MB per item. You can upload one image/file asset at a time, or grab all the images from a single web page. All these items are stored in the Design Studio section of Marketo.

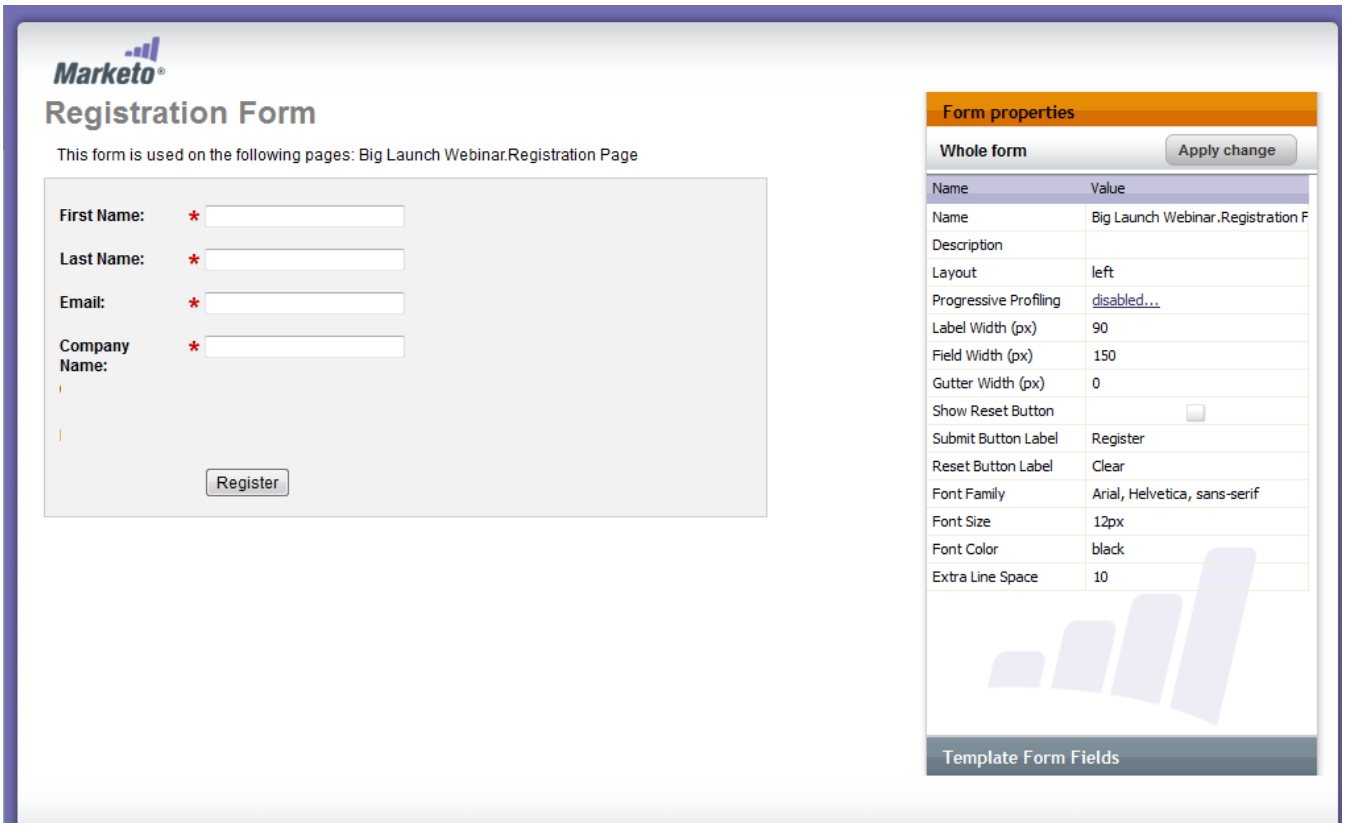
Grab the images from one of the pages of your company's website:

1. Navigate to the Design Studio section
2. New > Grab images from Web page
3. Enter the URL of web page desired; click Next
4. Marketo will display all the images of that page, allowing you to pick and choose exactly which images you wish to import
5. Click the checkbox next to each desired image; click Next
6. Your images are now imported, and can be organized into folders as desired.

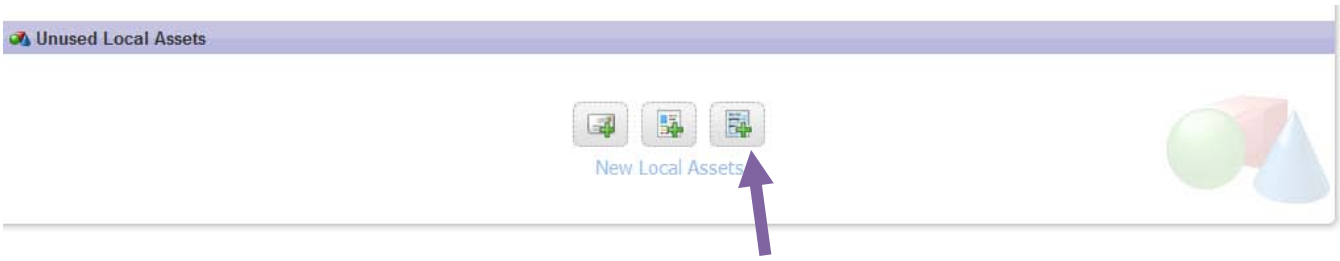
© 2011 Marketo Proprietary and Confidential

11. CREATE FORM

With Marketo, you can create a registration form to use for all your Events. It takes only a few minutes! When finished, you form will look like this:



To create a Form for the Big Launch Webinar registration:



© 2011 Marketo Proprietary and Confidential

1. On the Unused Local Assets section, click on the Form icon, or select **New > New Local Asset > Form**
    a. Call it “Registration Form”
    b. Click Create, and the Form Editor will open
2. From the Palette, click on **Template Form fields** to open the list of potential Fields
3. Drag in the following fields:
    - First Name
    - Last Name
    - Email Address
    - Company Name
4. Click on **Form Properties** to close this section
5. Under **Whole Form** properties
    a. Remove the Clear button from the form by de-selecting “Show Reset Button” checkbox
    b. Click on Submit button label to change the Submit button to read “Register”
6. Double-click on each field to bring up Field Specific settings; for each, click the checkbox “Is Required”
7. Email Address: change the Label to read “Email”

Close Form to save; it will now appear in the Unused Local Assets section.

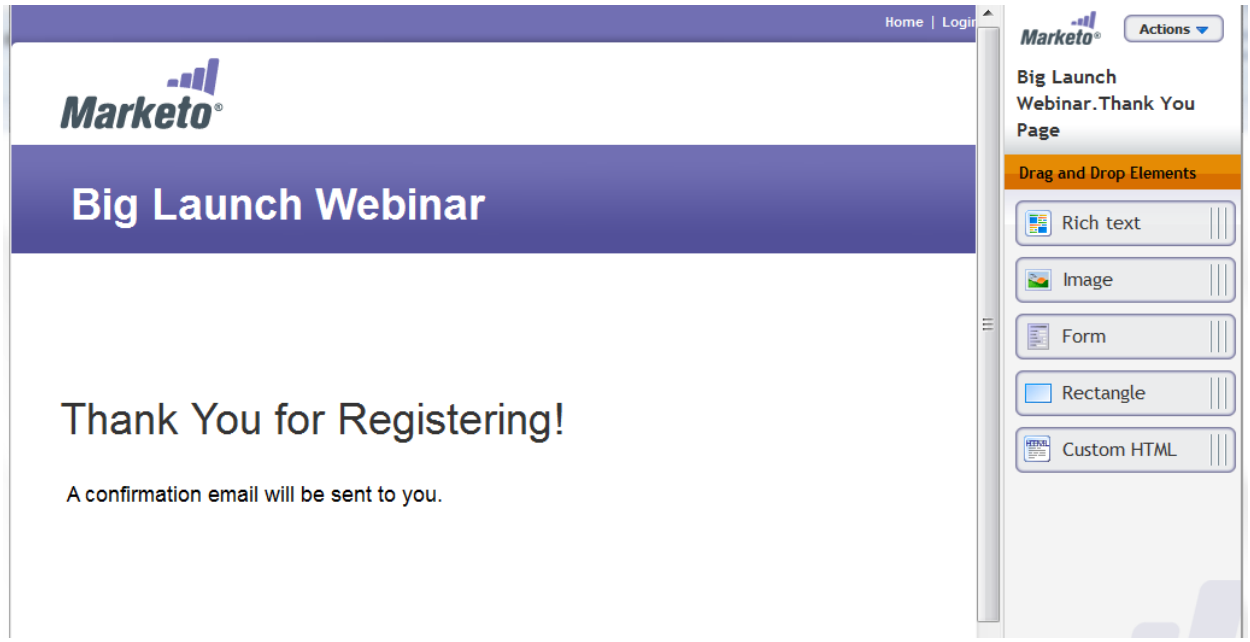
© 2011 Marketo Proprietary and Confidential

12. CREATE LANDING PAGES

For our Big Launch Webinar, we want to place our Form on a Landing Page; after a lead submits the Form, we want them to see a follow-up page as confirmation. It's easier in Marketo to *create the follow-up page first*, so can link them together.

To create the Follow-up Landing Page:

1. **New > New Local Asset > New Landing Page**
2. Name this page "Thank-You"; Marketo will build the remainder of the URL. Use dashes between words for SEO optimization
3. Select a Landing Page Template
4. Click Create, and the Landing Page Editor will open
5. Drag in Text and Image elements (if desired).
6. Double-click on the text element to add 'thank-you' type of information; you can resize the element and format the text with the HTML toolbar

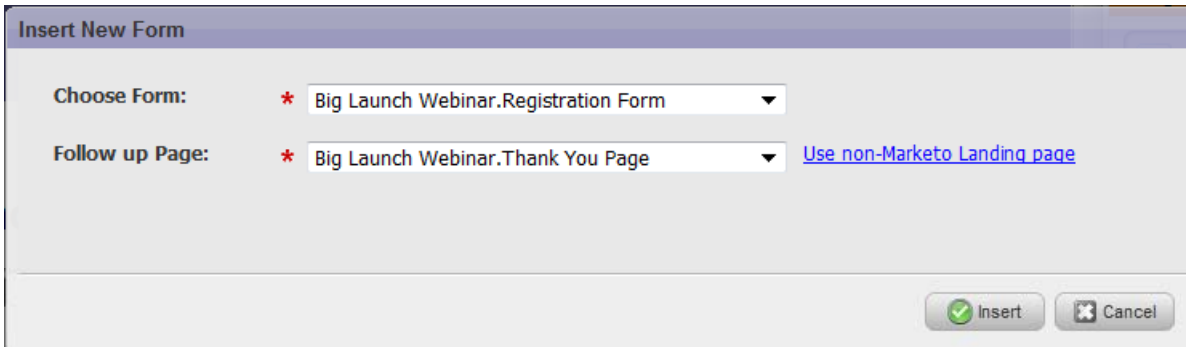


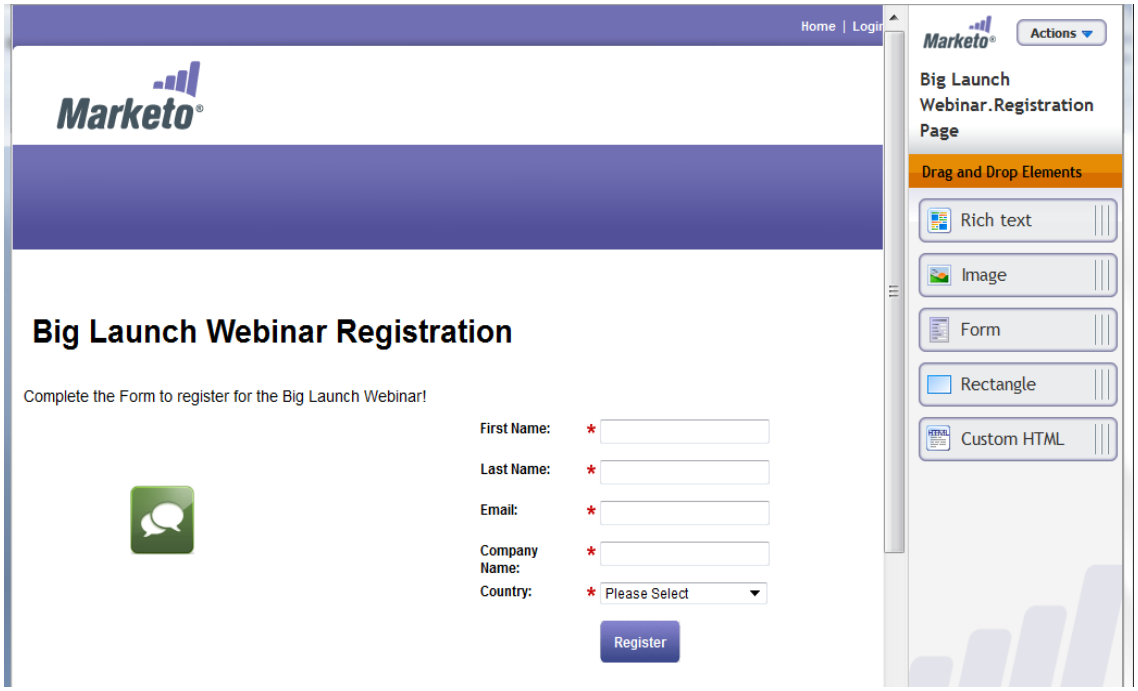
1. Close to save
2. **Landing Page Actions > Approve Draft**

© 2011 Marketo Proprietary and Confidential

From this same page, create the Registration Landing Page:

1. **Landing Page Actions > Clone**
2. Name the new page “Registration”
3. Update the text accordingly
4. Drag in the Form element
    a. Select your Registration form, and select your Thank-you page to follow; click Insert.

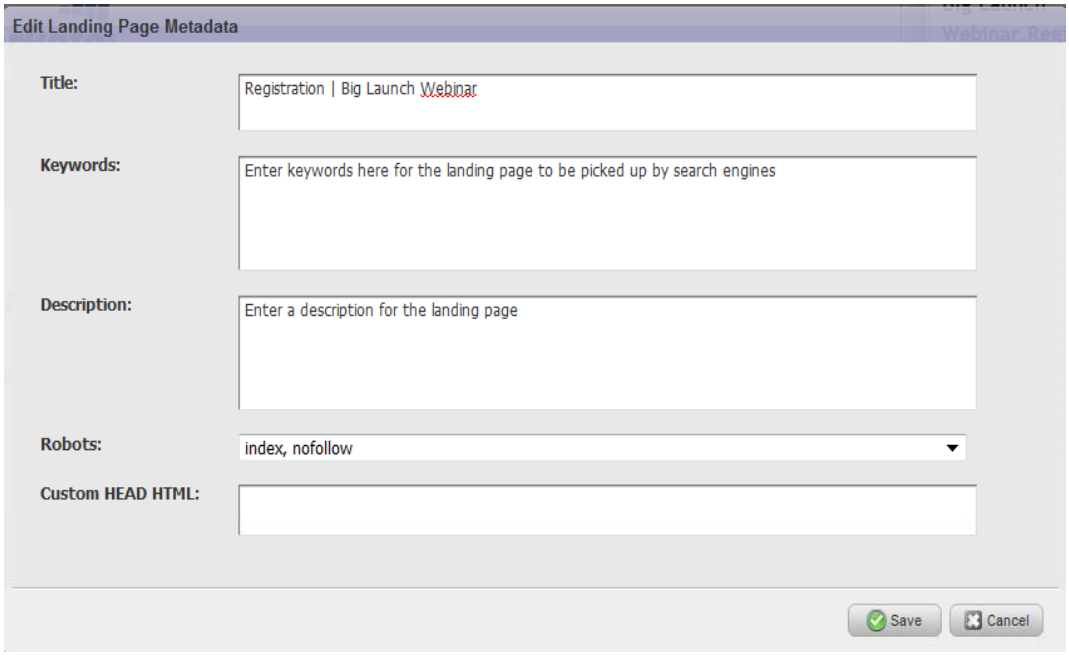




5. Click on **Actions > Edit Page Meta tags** to enter key data for this page to be found via search engines.

© 2011 Marketo Proprietary and Confidential

6. Be sure to leave the Robot settings to “Index, no follow” so your Thank-you page does not appear in search engine results:



7. Close the editor
8. **Landing Page Actions > Approve Draft**

Both Landing Pages will appear in the Tree, and in the Unused Local Assets section, along with the Form. You can actually test out the pages and form: copy and paste the URL of the Registration Landing page into another tab of your browser; fill out the form to see the resulting thank-you page.

Right-click and copy the URL of the Registration Landing page, and paste into your computer’s notepad for use in the next exercise.

© 2011 Marketo Proprietary and Confidential

13. CREATE EMAILS

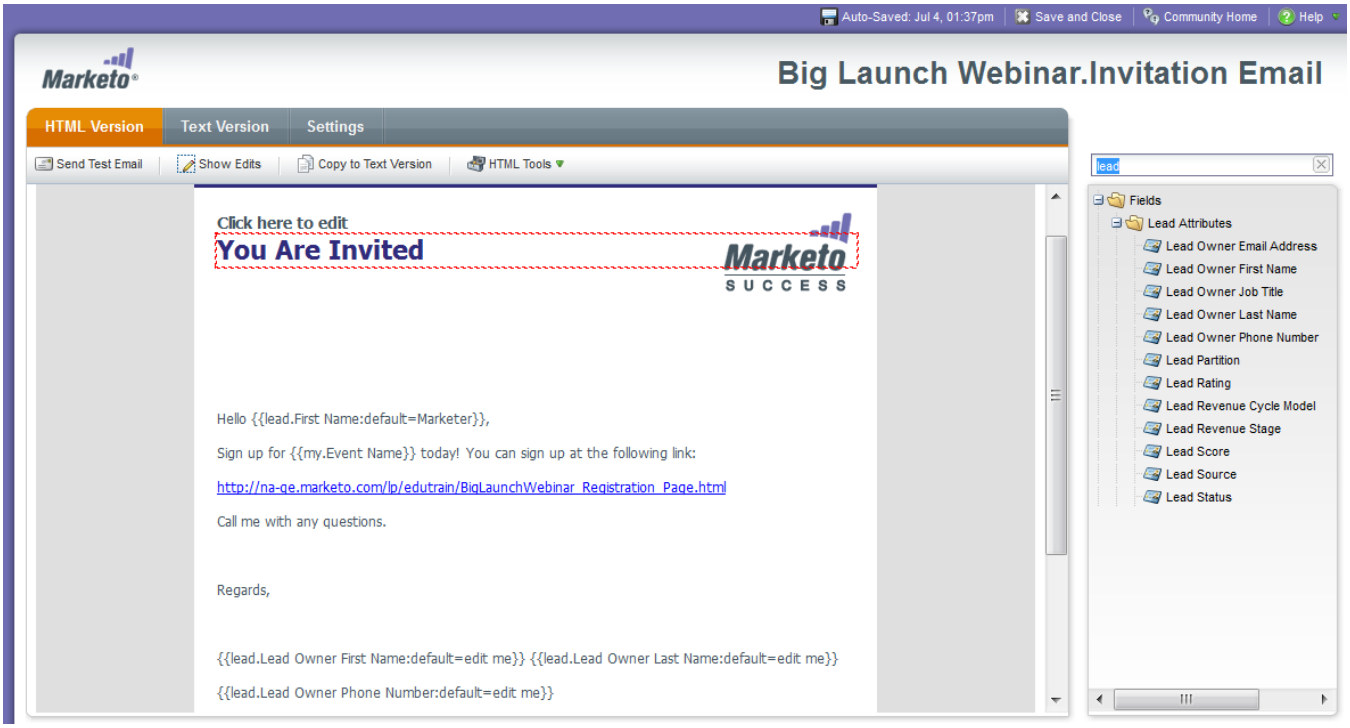
You'll need emails to promote your Big Launch Webinar. We'll create a promotional email inviting leads to register, and a follow-up email the confirm registration should they fill out the form.

Just as you used tokens to personalize the event, you can use Lead Tokens to personalize your email messages with known lead information. They will take the format of **{{Lead.token name}}.**

13.1 Marketing Email

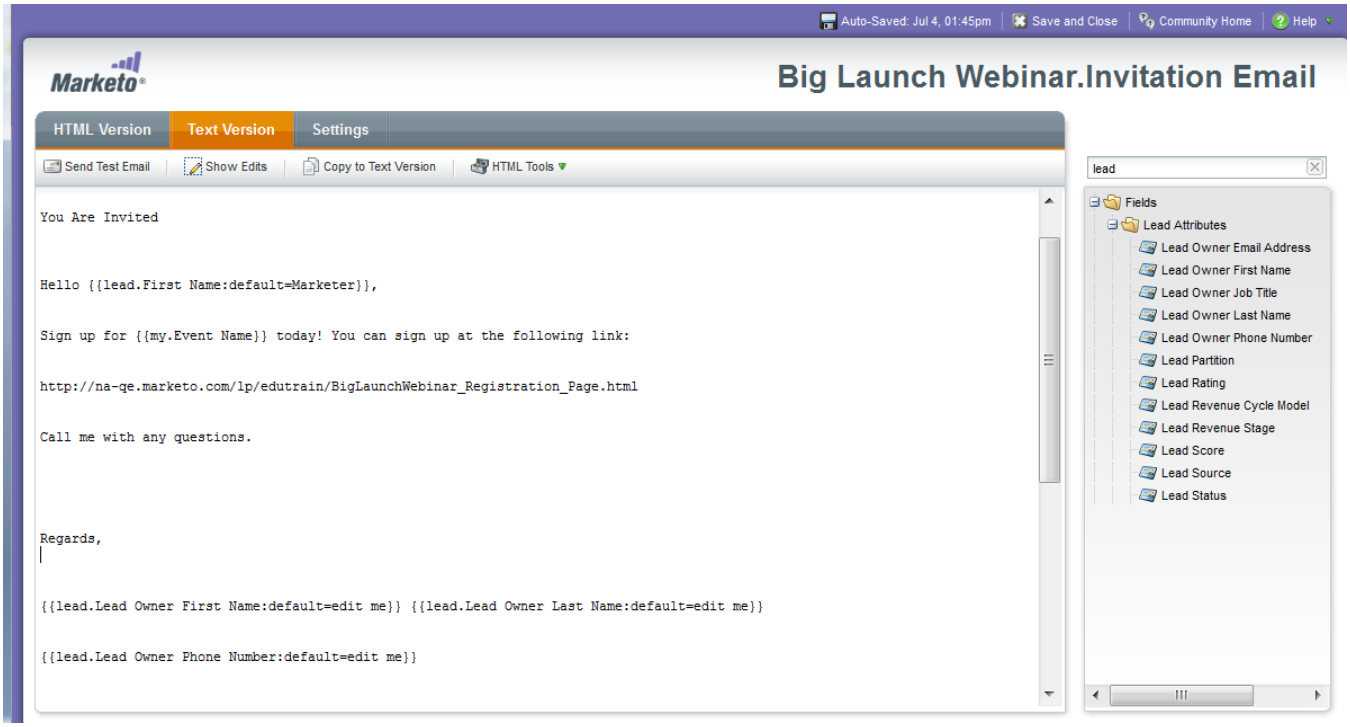
To create the Invitation Email:

1. **New > New Local Asset > New Email**
2. Call this "Invite"
3. Select your Standard Template
4. In the email editor:
    a. Click on the text field to modify and turn this into an invitation.
    b. Paste in the URL to the Registration Landing Page, or highlight text and use the HTML editor to hyperlink
    c. Drag in Lead tokens: First Name, Lead Owner First Name, Lead Owner Last Name, and Lead Owner Phone. Update the "edit me" information so that it will populate whenever this information is blank in Marketo!



© 2011 Marketo Proprietary and Confidential

5. When complete, click Copy to Text version; this will take you to the next tab
    a. Clean up text formatting and **re-insert** Registration Landing Page URL



6. Click on Settings to update Subject line
7. Click **Save and Close**
8. **Email Actions > Approve Draft.**

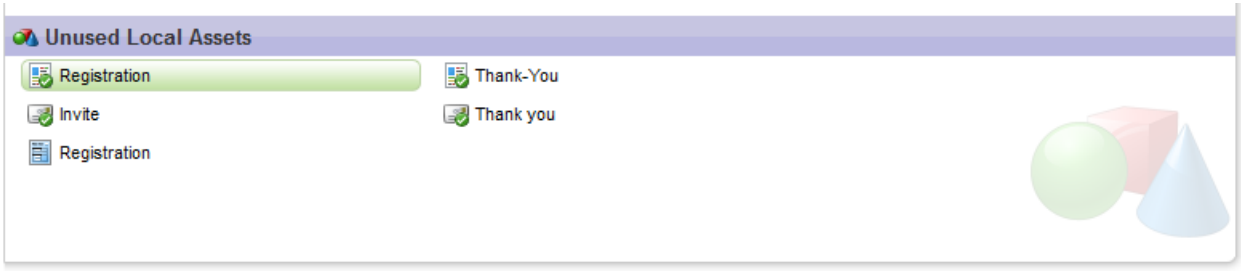
13.2 Auto-Response Email

From here, create the Auto-Response Email:

1. **Email Actions > Clone**
2. Name this Email “Thank You for Registering”
3. Check the **Operational Email** checkbox in the popup; click Create
4. Update the text accordingly, and remove the registration page information
5. Copy to Text, and repeat Step 3
6. In Settings, be sure to update the Subject Line!
7. Save and Close
8. **Email Actions > Approve Draft.**

© 2011 Marketo Proprietary and Confidential

The Local Assets for your first two Campaigns in the Big Launch Webinar are now ready!



© 2011 Marketo Proprietary and Confidential

Big Launch Webinar: Event Lifecycle

OUTBOUND MARKETING, EVENT PROCESSING

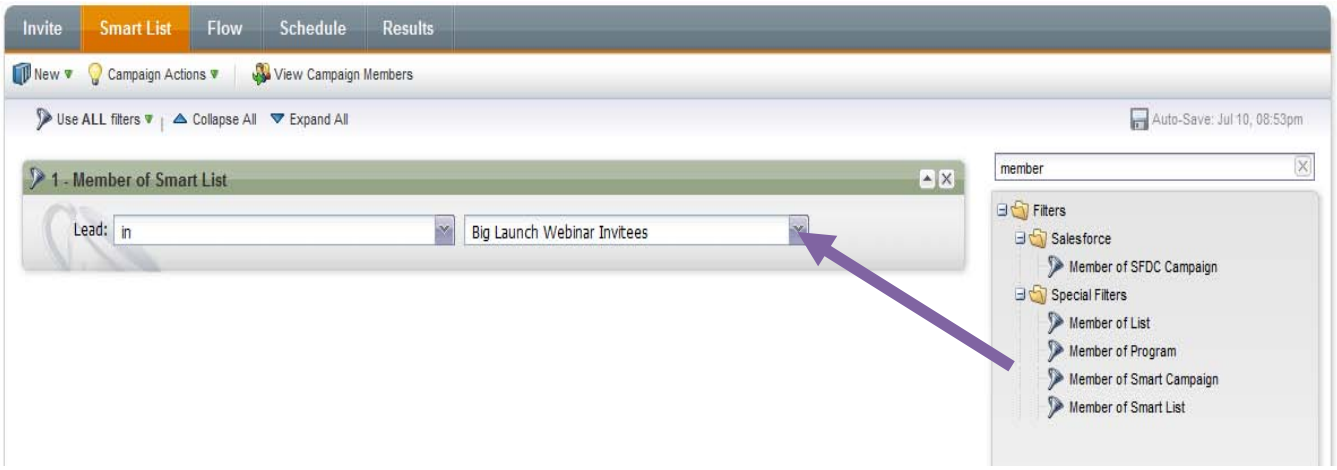
Get Started: Navigate to the Marketing Activities section of Marketo. Select the Big Webinar Event, the Assets Tab.

SEND INVITE (BATCH FILTER CAMPAIGN)

Let's send out the invitation! This is a Batch Filter Campaign that you'll schedule to send at a specific date and time.

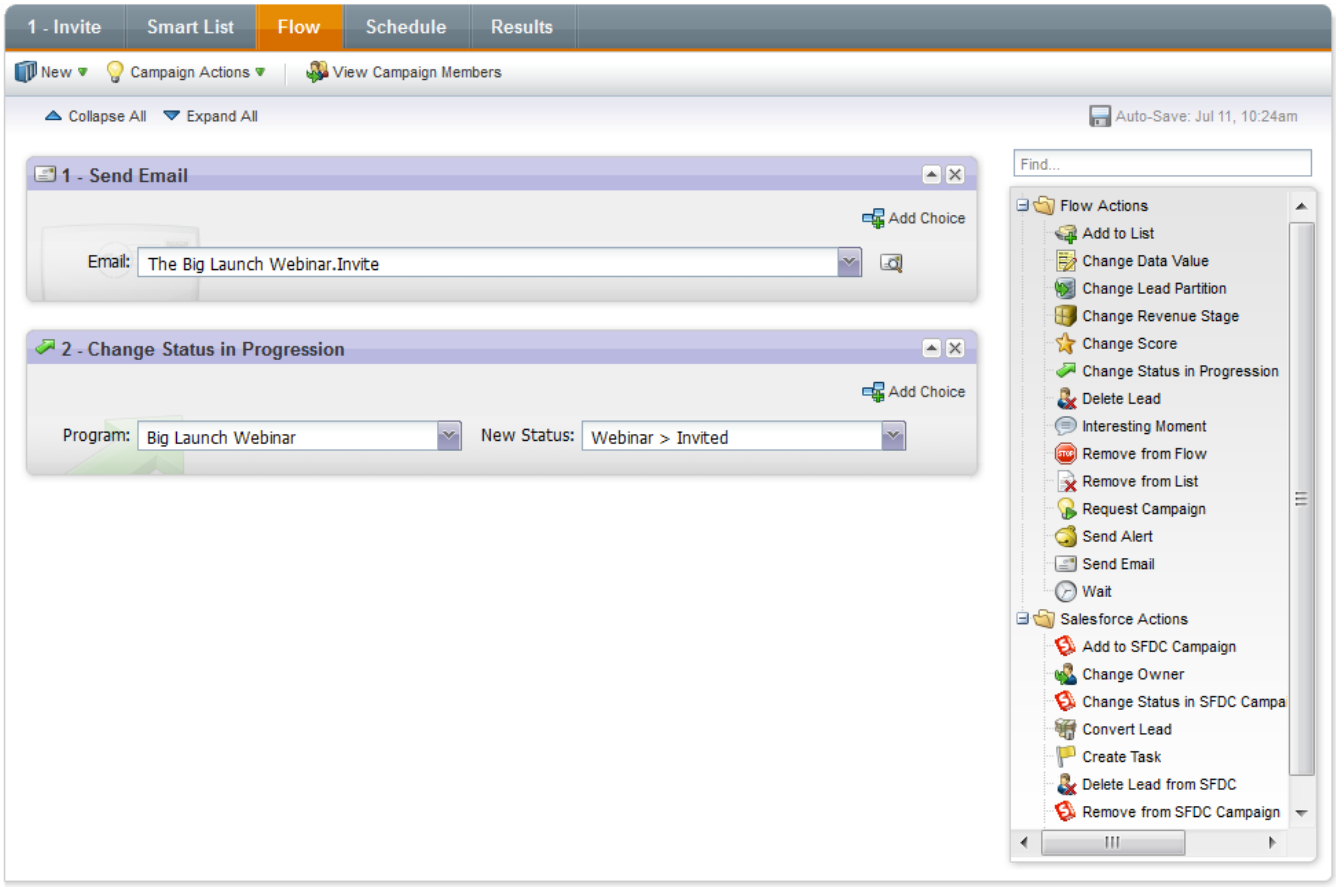
14. CREATE INVITATION CAMPAIGN

1. **New > New Smart Campaign**
2. Call this "Invite"
3. Smart List—drag in **Member of Smart List**
    a. Select Big Launch Webinar Invitees Smart List



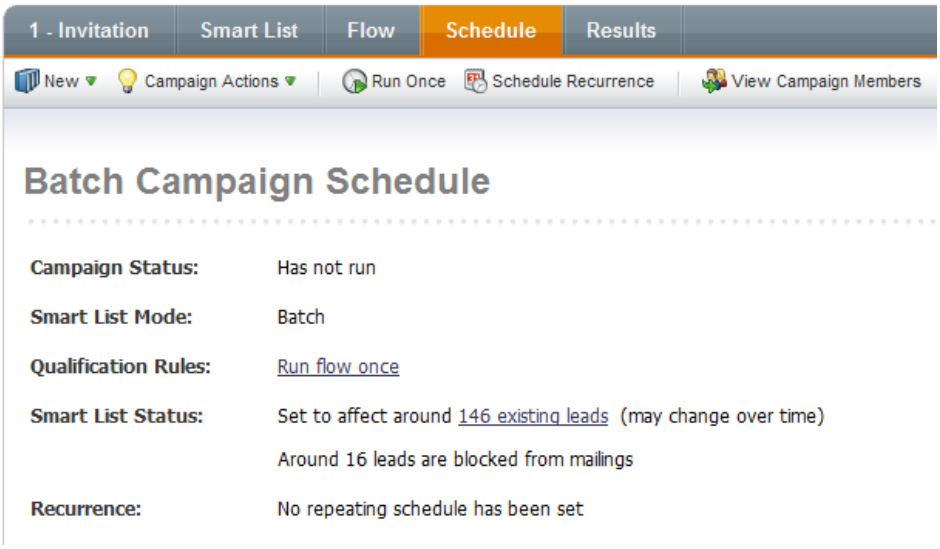
© 2011 Marketo Proprietary and Confidential

4. Flow:
    a. Drag in **Send Email**, and select your Invite email
    b. Drag in **Change Status in Progression**, and select “Invited”

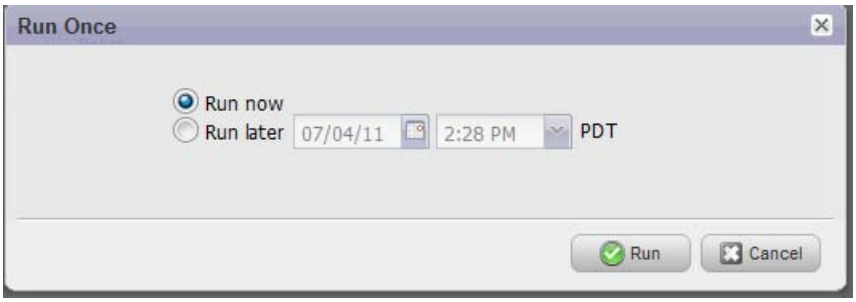


© 2011 Marketo Proprietary and Confidential

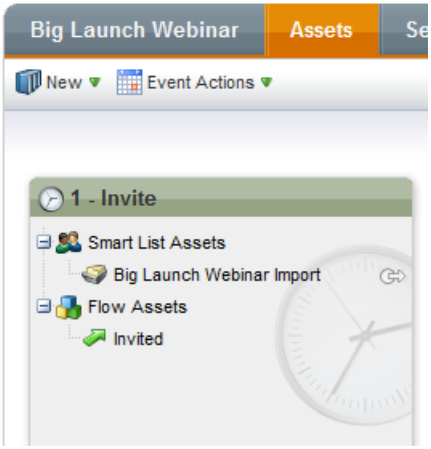
5. Schedule:
    a. Keep the Qualifications as "Run Flow Once" so leads will only ever qualify for the Flow once, even if you decide to send out this invitation multiple times



    b. On the toolbar, click **Run Once**: either send the Campaign right now, or schedule a date/time



The Clock icon confirms that your Campaign has now been created and scheduled to run in advance:



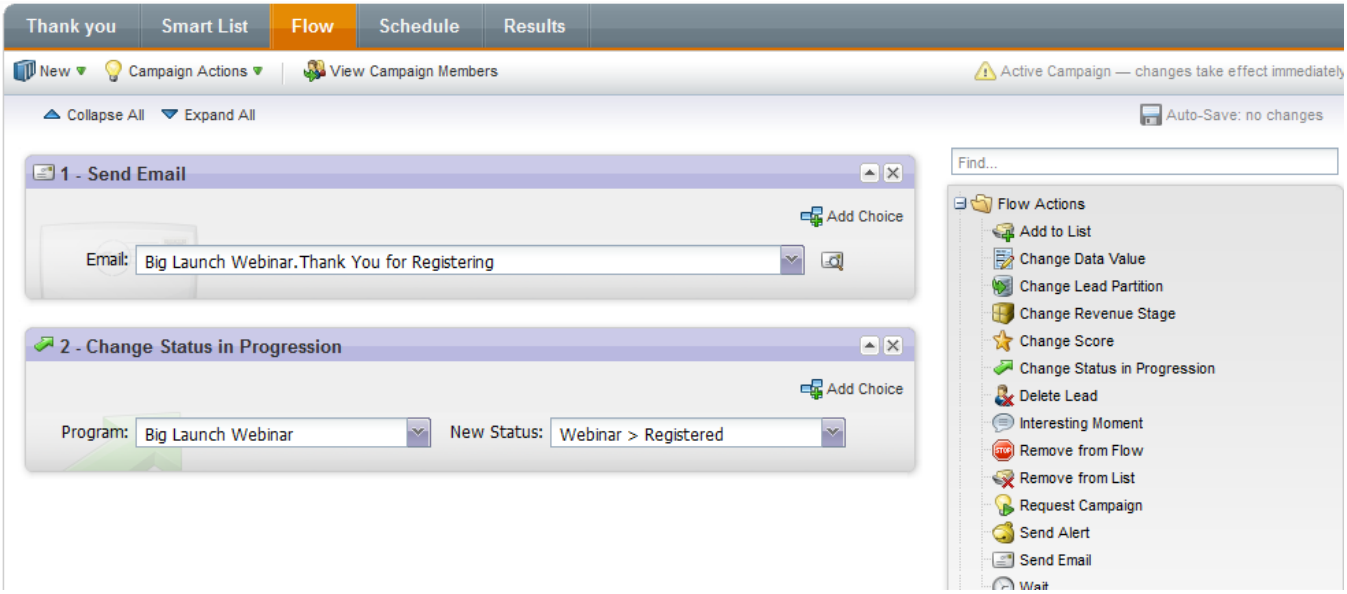
© 2011 Marketo Proprietary and Confidential

THANK-YOU (TRIGGER CAMPAIGN)

Make sure your Trigger Campaign is in place as soon as possible so leads receive their confirmation after submitting their registration!

15. CREATE TRIGGER AUTO-RESPONSE CAMPAIGN

1. **New > New Smart Campaign**
2. Call this "Thank You"
3. Smart List: **Fills out Form**—select "Big Launch Webinar.Registration."
4. Flow—
    a. Send Email—select "Big Launch Webinar.Thank You for Registering"
    b. Change Status in Progression, set to "Webinar > Registered"



5. Schedule—Set the Qualification to be Run Flow Every Time, in case leads register more than once. No date/time is set for a Trigger Campaign, as it will run each time a lead takes the desired Trigger action
6. Click Activate.

Your Trigger Campaign is now "listening" for your invitees to take the desired behavior. Your first two Campaigns have now been created and activated!

© 2011 Marketo Proprietary and Confidential

EVENT REGISTRATION

With any Program or Event, there are defined **Progression Statuses** that a Member can take in the progress of participating. You can use some or all of these steps provided by Marketo, or modify the steps in the Admin section.

Marketo provides these Progression Steps for a Webinar Event, culminating with the Success steps of attending the webinar or downloading its content later:

- Invited
- Pending Approval
- Waitlisted
- Registered
- Rejected
- No Show
- Attended
- Downloaded

16. REGISTRATION: UPDATE MEMBER PROGRESSION STATUS

As leads register for the Webinar, you can automatically update their Progression status as part of your existing Campaign: in the previous exercised, you added this as a Flow step in your Campaign: Change Status in Progression—set to Webinar > Registered.

You can also update their Status in the Member Grid via Change Status, and/or by importing a list of updated status information for your Members:

Change Status:

1. Click on Member(s) to be updated
2. Click on **Change Status**
    a. Set to Registered
3. The single flow action will run automatically
4. When complete, the Member grid will show the new Status

© 2011 Marketo Proprietary and Confidential

Member Import

1. Prepare a .csv file of those members you wish to update to Registered
    a. include only one column of data, their email address; make sure the column header reads "Email Address"
2. Click **Import Members**
3. Select your file, leave other settings as is.
4. Click Next
5. Click Next again
6. Marketo will ask you to indicate the Member Status
    a. Select Registered
    b. Click Import.

© 2011 Marketo Proprietary and Confidential

Lead Lifecycle Campaigns should live in Programs SEPARATE from Programs and Events you create for other marketing initiatives. Lead Lifecycle Program Campaigns operate on all your Leads across your Marketo instance; separating them also makes it easier to find and update as your lead lifecycle processes evolve.

17. LEAD SCORING CAMPAIGNS

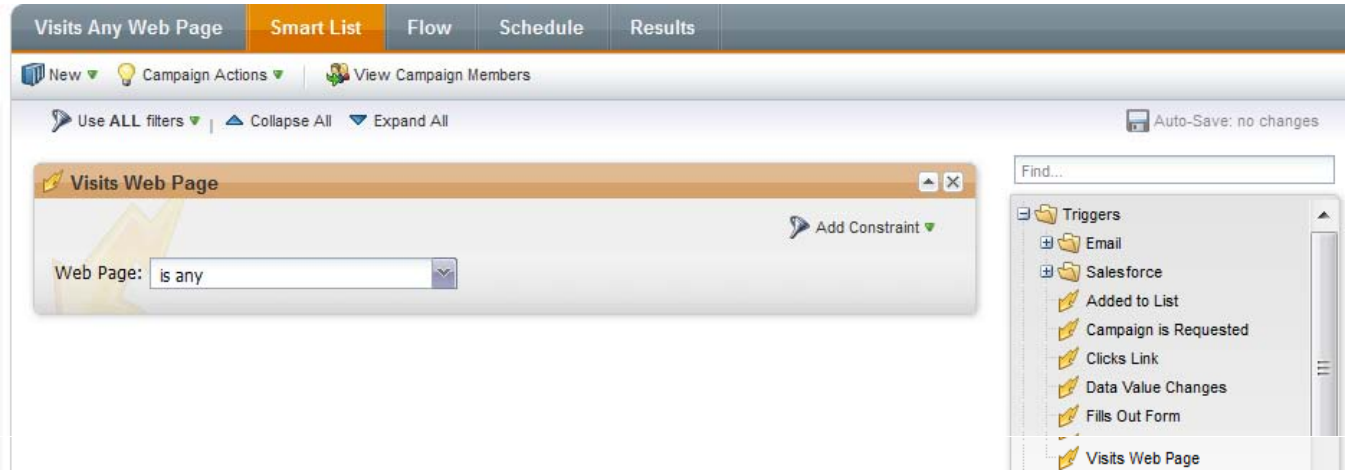
Lead Scoring Campaigns reward your leads with Lead Score points for their interest in your company, helping you prioritize which leads are "hotter". The following Smart Campaigns will reward leads who take desired behaviors, including desired behaviors for the Big Launch Webinar.

These exercises are examples; DO NOT activate these Campaigns.

17.1. Visits Any Web Page

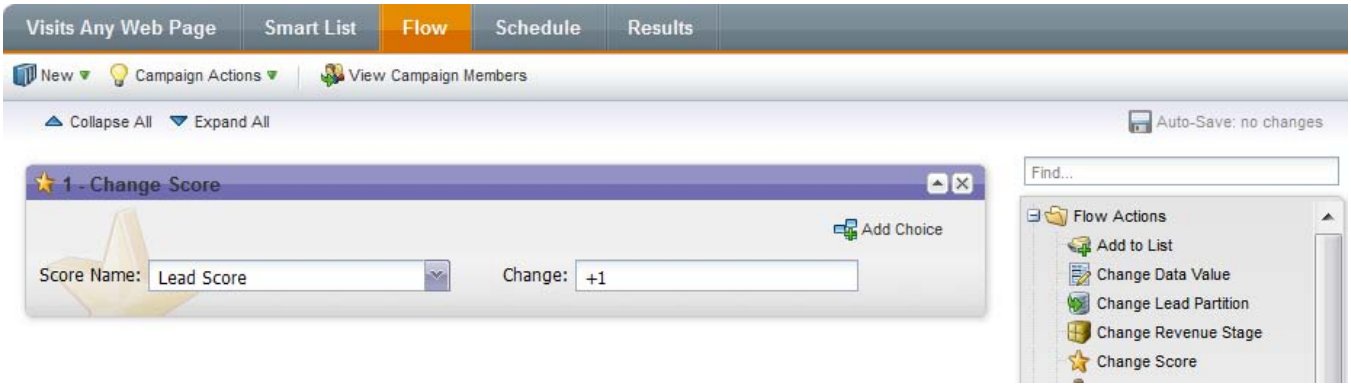
Give leads a point for every page they visit on your website.

1. Right-click on MKTO Training Folder and select New Campaign Folder
   a. Call it "MKTO Lead Lifecycle"
2. Right-click on this folder and create a new Program, "Lead Scoring" for the next 3 Smart Campaigns. *For the Channel, select any value for the time being; you will want to create a custom Channel in the Admin section to tag your actual Lead Lifecycle Programs*
3. Right-click the Lead Scoring Program and select New Smart Campaign
4. Call it "Visits Any Web Page"
5. Smart List—Trigger **Visits Web Page**, set operator to "is any"

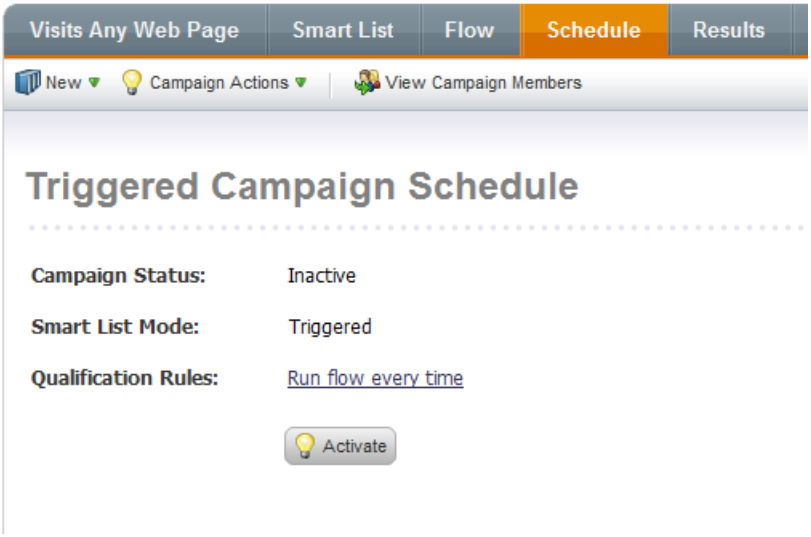


© 2011 Marketo Proprietary and Confidential

6. Flow—**Change Score**, Lead Score. In the Change Field, type in "+1"



7. Schedule—Click on Qualification and Set to Run Flow Every Time. **This ensures they will qualify for this Flow step EVERY time they visit a page.**



8. DO NOT ACTIVATE.

© 2011 Marketo Proprietary and Confidential

17.2. Clicks Link Any Email

Give leads credit for responding to any of your marketing emails. This Smart Campaign will NOT give credit if they should happen to click on the Unsubscribe Link.

1. Right-click on the Lead Scoring Program and select New Smart Campaign
2. Call it “Clicks Link Any Email”
3. Smart List—Trigger **Clicks Link in Email**, operator set to “is any”
4. Flow—**Change Score**, Lead Score +3
5. Schedule—set Qualification to be Run Flow Every Time
6. DO NOT ACTIVATE.

17.3. Attends Webinar

Add points to a Lead Score for every Webinar they attend.

1. Right-click on the Lead Scoring Program and select New Smart Campaign
2. Call it “Attends Webinar”
3. Smart List—Trigger **Progression Status is Changed**
    a. Set to “is any” Program
    b. Add Constraint: New Status is Webinar > Attended
4. Flow—**Change Score**, Lead Score +10
5. Schedule—set Qualification to be Run Flow Every Time
6. DO NOT ACTIVATE.

© 2011 Marketo Proprietary and Confidential

18. SYNC LEAD BACK TO SALES

With Smart Campaigns you can create multiple scenarios to send sales-ready leads to your sales team by syncing to Salesforce, and/or sending a Sales Alert email. This sample Campaign would automatically sync and update Sales when you update lead attendance at a webinar Event. Leads attending the Big Launch Webinar would qualify for this Campaign.

New Marketo customers: Regardless of which CRM you use, or if you are using Marketo Lead Management as a stand-alone application, review your sync options in further detail with your Customer Enablement Manager before activating any Sync Campaigns.

The below is a sample of lead sync Campaign should you wish to practice this activity; do NOT activate this Campaign. This exercise involves the creation of an Email in the Design Studio directed to your sales rep to serve as an internal Alert, and includes text that the lead has attended an Event. It also includes email tokens for the lead's contact information.

1. In the Lead Lifecycle Folder, create a New Program, "Send Leads to Sales"
2. Right-click on the Program to create a New Smart Campaign: Sync Webinar Attendees
3. Smart List—Trigger **Progression Status is Changed**: any Program
    a. Add Constraint: New Status is Webinar > Attended
4. Flow—**Send Alert**: insert your Sales Email. If using Salesforce, you can also use the Sync and Task Steps
5. Schedule—Run Flow Every Time
6. DO NOT Activate.

© 2011 Marketo Proprietary and Confidential

RE-INVITE AND REMINDER CAMPAIGNS

Are there members who have been invited but not yet registered? Send them a re-invitation. And don't forget to send your registrants a reminder to attend! Both tasks involve Batch Filter Campaigns. Take advantage of existing local assets whenever possible and clone them as a starting point.

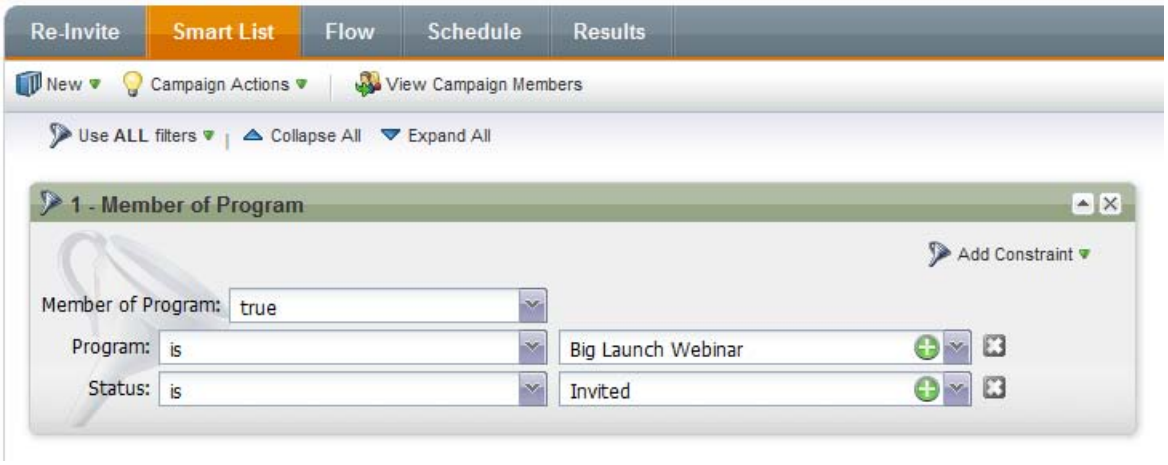
BEST PRACTICE

- Avoid cloning an Operational Email so that you do not copy this setting into your new email.

19. RE-INVITATION CAMPAIGN

Return to your Big Launch Webinar Event, the Assets tab

1. **R**ight-click on the Invite email to Clone
2. Call it "Re-Invite"
3. Modify the email
    a. Be sure to update the Subject line in your real emails!
    b. Close
    c. Right-click to approve
4. **New > New Smart Campaign:** Call it **"**Re-Invite"
5. Smart List—Filter, **Member of Program**
    a. Set Member of Program to "true"
    b. Add Constraint for Program, set to is "Big Launch Webinar"
    c. Add Constraint for Status, set to is "Invited"



6. Flow—**Send Email**, select your Re-invite email
7. Schedule—Run Flow Once. Set date and time.

© 2011 Marketo Proprietary and Confidential

20. REMINDER CAMPAIGN

1. Right-click on the Invite email to Clone
2. Call it “Reminder” email
3. Modify the email
    a. Be sure to update the Subject line in your real emails!
    b. Close
    c. Right-click to approve
4. **New > New Smart Campaign:** Call it “Reminder”
5. Smart List—Filter, **Member of Program**
    a. Set Member of Program to “true”
    b. Add Constraint for Program, set to is “Big Launch Webinar”
    c. Add Constraint for Status, set to is “Registered”
6. Flow—**Send Email**, select your Reminder email
7. Schedule—Run Flow Once. Set date and time.

© 2011 Marketo Proprietary and Confidential

Big Launch Webinar: Event Launch & Review

FOLLOW-UPS, REPORTING

Get Started: Navigate to the Marketing Activities and Analytics section of Marketo.

FOLLOW-UP CAMPAIGNS

Make sure you schedule your follow-ups to take place after you've had time to update Member status, and any content you wish to share is complete and ready to go. Follow-up communications should be Batch Filter Campaigns, so they can be scheduled to be sent after your post-event work is completed.

21. THANKS FOR ATTENDING

1. **R**ight-click the "Reminder" email to Clone
2. Call it "Thanks for Attending"
3. Modify the email
    a. Be sure to update the Subject line in your real emails!
    b. Close
    c. Right-click to approve
4. **New > New Smart Campaign**: "Thanks for Attending"
5. Smart List—Filter, **Member of Program**
    a. Set Member of Program to "true"
    b. Add Constraint for Program, set to is "Big Launch Webinar"
    c. Add Constraint for Status, set to is "Attended"
6. Flow—**Send Email**, select your Thank-you email
7. Schedule—Run Flow Once. Set date and time.

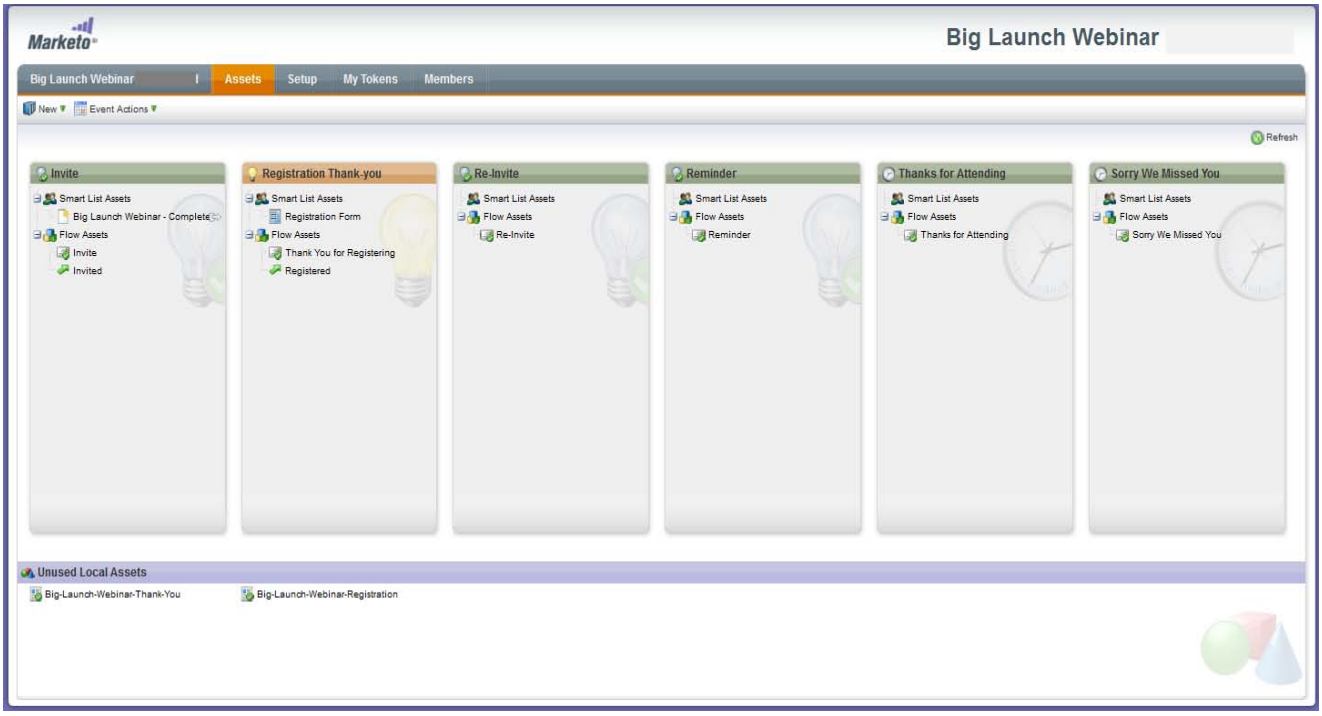
© 2011 Marketo Proprietary and Confidential

22. SORRY WE MISSED YOU

Make sure all you first update the Progression Status for all who registered for an Event, but did not attend, to "No Show".

1. Right-click your Invite email to Clone
2. Call it "Sorry We Missed You"
3. Modify the email
    a. Be sure to update the Subject line in your real emails!
    b. Close
    c. Right-click to approve
4. **New > New Smart Campaign**: "Sorry We Missed You"
5. Smart List—Filter, **Member of Program**
    a. Set Member of Program to "true"
    b. Add Constraint for Program, set to is "Big Launch Webinar"
    c. Add Constraint for Status, set to is "No Show"
6. Flow—**Send Email**, select your Sorry email
7. Schedule—Run Flow Once. Set date and time.

The Assets Tab now looks like this:



© 2011 Marketo Proprietary and Confidential

23. RECORD SUCCESS: DOWNLOADED

You've now sent out your Webinar content to your attendees and no-show registrants. Those "no-shows" can graduate to being a Successful Member if they download the content!

1. **New > New Smart Campaign**: "Downloaded"
2. Trigger—**Clicks Link in Email**, Email is Sorry We Missed You
3. Flow—**Change Status in Progression**, Status is now Webinar > Downloaded
4. Schedule—Run Flow Once.

The Campaigns for your Big Launch Webinar Event are now complete!
Keep your MKTO Training Folder and contents for reference as you continue to use Marketo Lead Management.

© 2011 Marketo Proprietary and Confidential

24. EXAMPLE: NURTURING TRACK

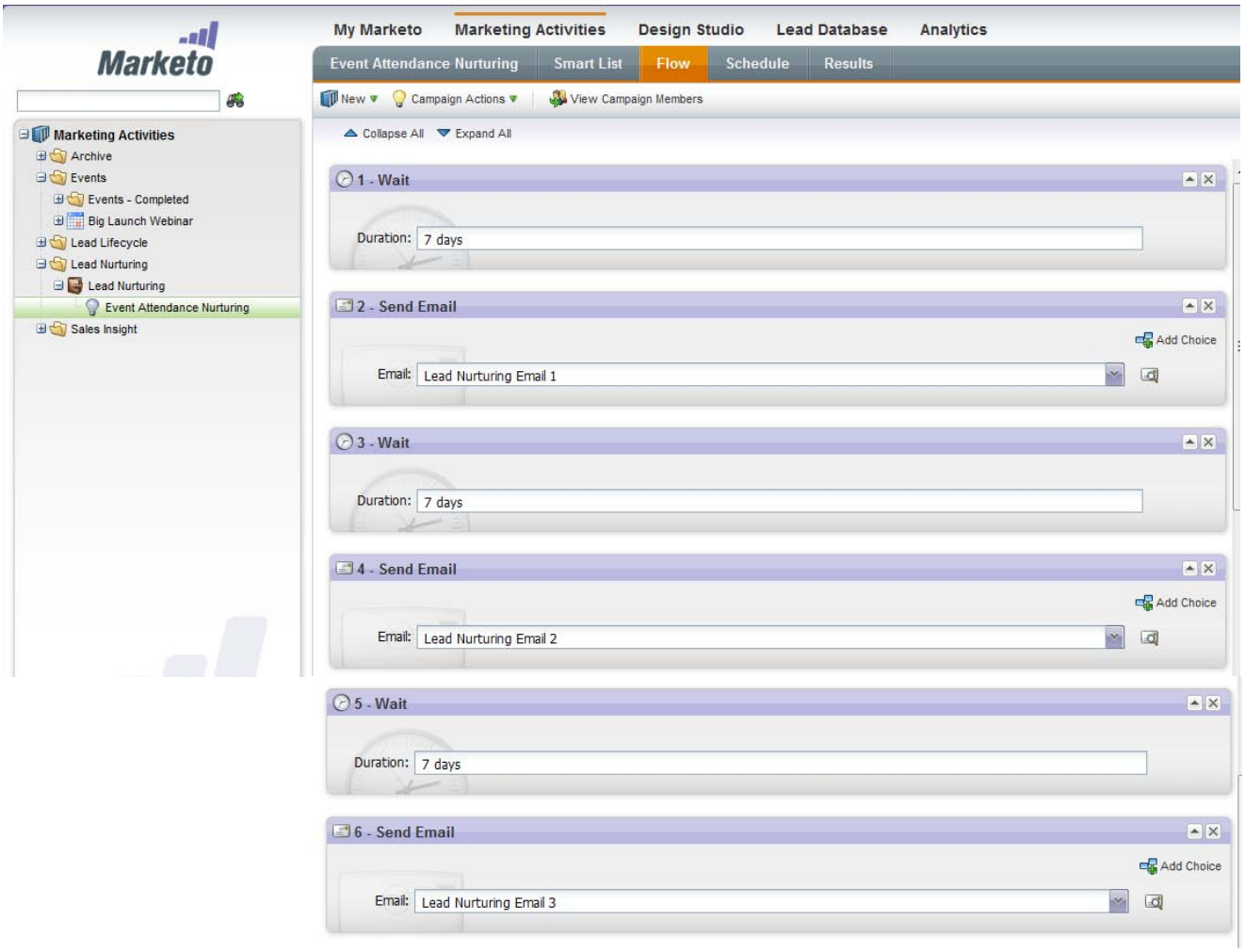
With Marketo you can place any leads in a nurturing track to receive multiple emails in a sequence. Start thinking about and sketching out the answers to the following questions:

- ❖ What audience would you want to place in a nurturing Campaign?
- ❖ What types of content would you send?

BEST PRACTICES:

- Create a Program to contain your lead nurturing Campaigns, Channel = Content
- For each nurturing Campaign, make sure your **Send Email** steps in the Flow step are separated by **Wait Steps.** This way leads won't receive the multiple emails at once!
- You can even begin the Flow with a Wait step if you wish to let leads "breathe".

The below is a sample Flow for a Nurturing Campaign:



© 2011 Marketo Proprietary and Confidential

REPORTING ON THE WEBINAR

Be sure to use the existing reports as a TEMPLATE: clone and create your own versions of the reports so you can freely edit, and place them in a Folder.

GET STARTED: Navigate to the Analytics Section of Marketo.

25. REPORTS: LEADS BY SOURCE

See the source of your new leads in your Marketo instance; if you have Salesforce, you'll also be able to see their associated Opportunity information:

1. **Program Reports > Leads by Source**
    a. Right-click to clone and create your own Report
2. **Report Actions > Report Settings**
    a. Change the time frame
3. **Subscriptions > New Report Subscription** to set a weekly schedule to receive/distribute this report to others

26. REPORTS: PROGRAM PERFORMANCE OVERVIEW

Review the quantitative performance of your Programs and Events:

1. **Program Reports > Program Performance**
    a. Right-click to clone and create your own Report
    b. Click on Report to see the summary by Program or Event
2. **Subscriptions > New Report Subscription** to set a monthly schedule to receive/distribute this report to others

© 2011 Marketo Proprietary and Confidential

Revenue Cycle Modeler: Visualize & Measure Lead Stage

REPORT ON LEAD STATUS

Get Started: Navigate to the Analytics Tab and click on the Revenue Modeler.

BUILD A SIMPLE REVENUE MODEL

The Marketo Lead Management Revenue Model is a reporting tool that helps visualize how leads come in to your organization and shows how they progress through the sales cycle. Building a Revenue Model is an exercise that Sales and Marketing should do together. Marketo Revenue Modeler brings:

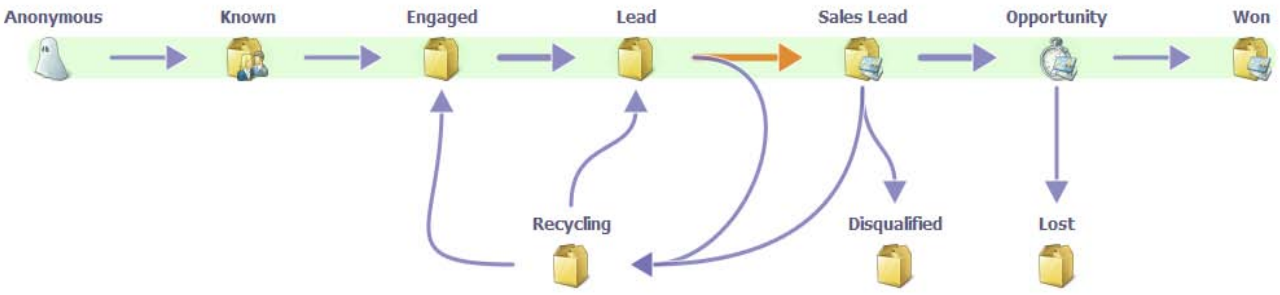
- Alignment—facilitates the conversation between Marketing to Sales on how leads pass from new to closed-won
- Metrics—it shows how leads move through stages and permits waterfall reporting on lead stage and phase

© 2011 Marketo Proprietary and Confidential

27. CLONE A REVENUE MODEL: SUCCESS WITH DETOURS

NOTE: The Modeler is covered in detail in your Quick start sessions; these exercises are intended as an introduction to Modeler concepts.

1. **Navigate** to the Analytics Tab
2. **Clone** the *Success with Detours Model*, as shown here:
3. **Modify** this model to map to your success path using the Inventory, SLA and Gate tools to create buckets for lead stages: what's the best case scenario for your leads? Use this as a discussion point between Marketing and Sales Management.

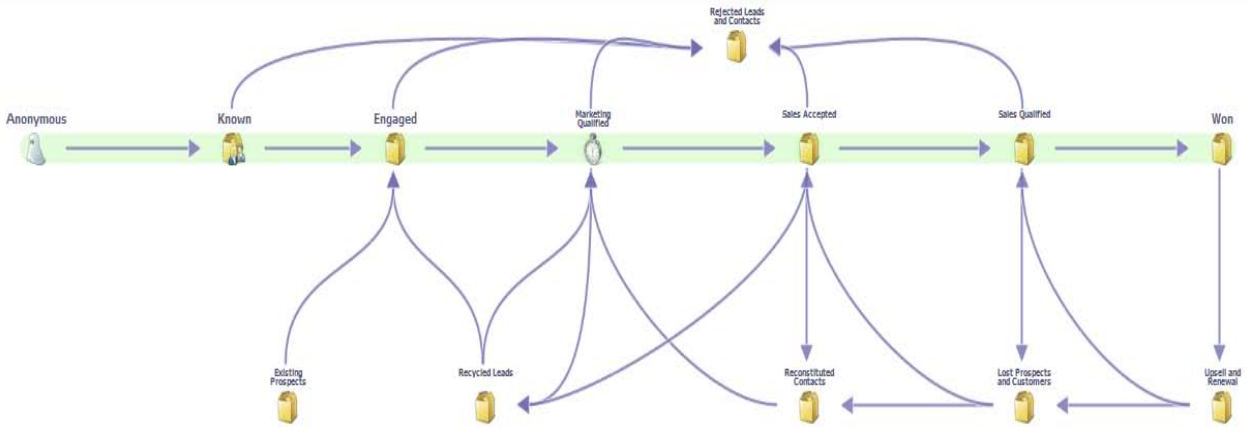


SAMPLE REVENUE MODELS

Take inspiration from these models, which move from simple to complex. Remember to think about how to recapture leads that are marked as closed lost or disqualified. Significant time and budget were spent to nurture those leads; can you bring them back them to opportunities with the appropriate re-nurture campaign?

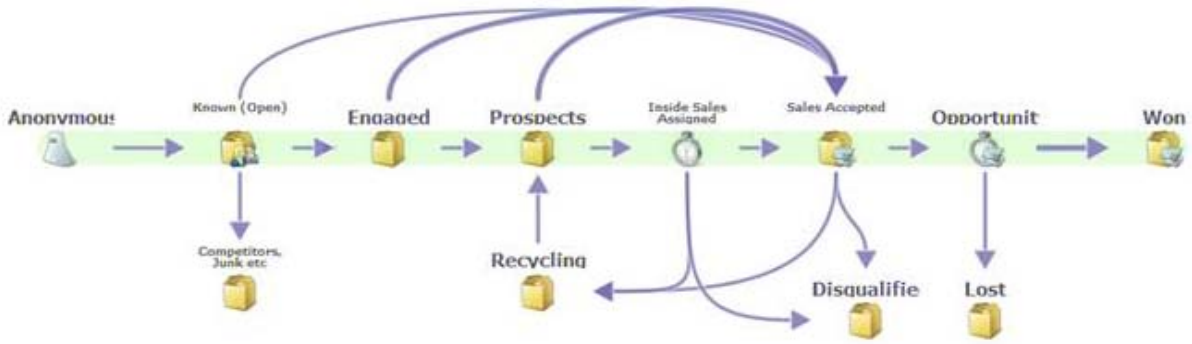
Model 1: Leads Leap to Sales Accepted

Consider whether this is not too optimistic; think about where leads fall out in each stage and create a plan to re-capture them.



© 2011 Marketo Proprietary and Confidential

Model 2: Filter out Rejects; Recycle and Re-Engage Lost Prospects and Customers



© 2011 Marketo Proprietary and Confidential

Resources

MARKETO CUSTOMER COMMUNITY

Our Customer Community is available 24/7 to help you reach Marketo stardom!

Take advantage of all our help content, and interact with other Marketo users, partners, and employees around the world.

- **Knowledge Base**: articles, videos, and tutorials
- **Technical Support**: create and track technical support tickets
- **Tutorials** on many topics
- **Ideas**: share and vote on product ideas
- **Discussion**: post questions and answers
- **Marketo University**: access information on our entire curriculum
- ***Marketo Masters Webinar Series*:** recorded sessions and subscription

RESOURCES SECTION ON MARKETO.COM

Visit our Resources section for all of our best practices and tools to maximize your B2B marketing and sales effectiveness!

To give feedback on this Exercise Guide, please send comments to education@marketo.com.

© 2011 Marketo Proprietary and Confidential