IMO Marketo Training 3

Recap from Training 2

Smart campaigns are the automated logic that run your program. Smart campaigns define:

1. **WHO** will qualify for your initiative
2. **WHAT** actions Marketo will take
3. **WHEN** the campaign is active

Recap from Training 2

Types of Smart Campaigns:

- Batch campaigns
  - Search for people based on specific attributes using filters
  - Are scheduled to run on specific dates and times or at a recurrence
  - Are batched and affect a set of people all at once
- Trigger campaigns
  - Look for lead behavior using triggers and fire off when actions occur
  - Cannot be scheduled as they trigger automatically when the behavior occurs
  - Affect one person at a time based on a triggered event

List types

A **static list** is a container to identify and organize people in the database

Smart lists are dynamic lists that pull lead information in real time With a Smart List, you can find specific groups of people using

Recap from Training 2

List imports require:

- First Name, Last Name, Email Address, Company, State, Country, Job Title , EHR (Channel)

Creating new assets:

- Assets can be: Landing Pages, Emails, Smart Lists, Smart Campaigns, Reports, Forms, AB Tests
- To create a new asset, right click on the folder or program you wish to add it to and select the asset you need

Types of emails

- Operational – Transactional emails that will go to unsubscribed leads
- Non-operational –Marketing emails that must contain an unsubscribe link. Will not go to unsubscribe leads

Naming Conventions

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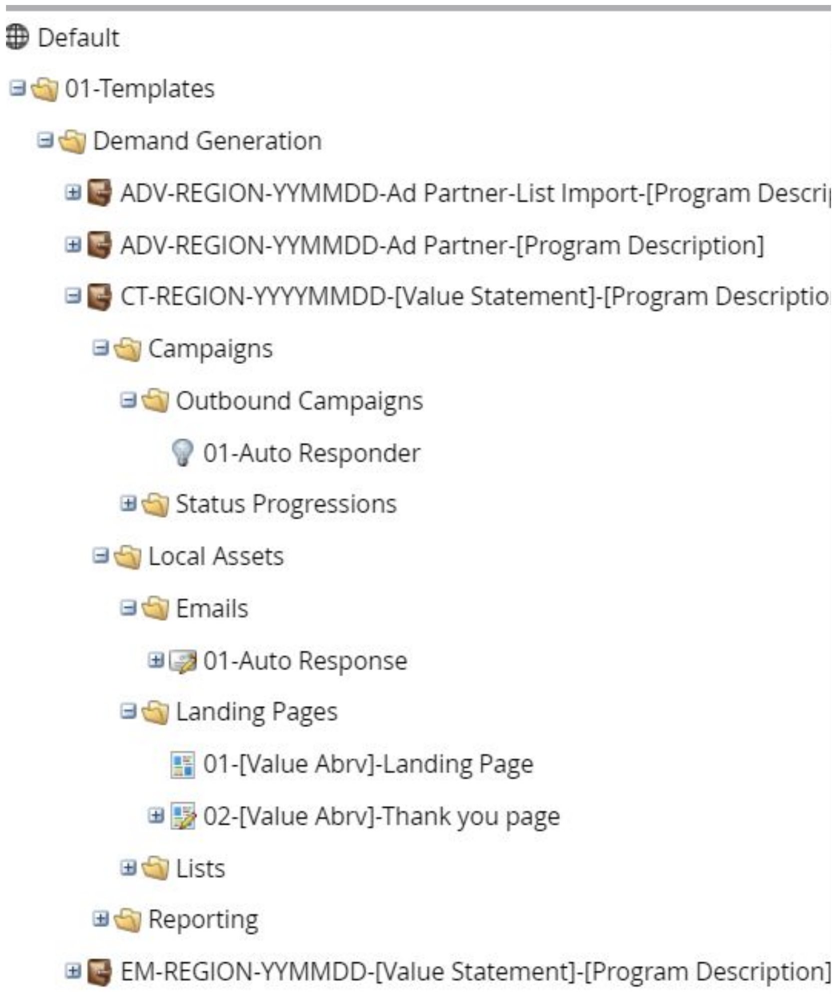
What are naming conventions

- Naming conventions help ensure our Marketo instance remains organized
- Ensure consistency which helps with reporting, searching for assets or programs
- Helps us know when to archive programs
- We use naming conventions on:
  - Emails
  - Landing pages
  - Folders
  - Programs
  - Images
  - Files (PDF)



Naming Conventions - COE

Program Name		Abbreviation	-	Region	-	Date of Launch	-	Program Description		Example
Content		CT		NA / EU		YYMMDD		Short description of program		CT-EU-190803-My new whitepaper
Events										
Tradeshow		TRD		NA / EU		YYMMDD		Short description of program		TRD-NA-200415-HIMMS 2020
Roadshow		RS		NA / EU		YYMMDD		Short description of program		RS-NA-201018-Denver EPIC Roadshow October
Webinar		WBN		NA / EU		YYMMDD		Short description of program		WBN-EU-191204-5 Tips for IMO Core Success
Email		EM		NA / EU		YYMMDD		Short description of program		EM-NA-190823-IMO Website Launch Announcement
Internal		IN		NA / EU		YYMMDD		Short description of program		IN-NA-191123-IMO Internal Newsletter November
Direct Mail		DM		NA / EU		YYMMDD		Short description of program		DM-NA-20191104-Ohio Mailer November Roadshow
Advertisement		ADV		NA / EU		YYMMDD				ADV-NA-191133-Facebook Ad Campaign November
Engagement Program		ENG		NA / EU		YYMMDD		Short description of program		ENG-200501-IMO New Users

Naming Conventions – Internal Programs

Program Name	Program Type	Abbreviation	Region	Date of Launch	Program Description
IN	Email Campaign	NL	YYMMDD	Short description of program	IN-EC-190803-August HR Update
IN	Recruiting	REC	YYMMDD	Short description of program	IN-REC-190803-New Positions August
IN	Event	EV	YYMMDD	Short description of program	IN-EV-190913-All Company Wide Meeting Q4
IN	Engagement	ENG	YYMMDD	Short description of program	IN-ENG-190903-New Employee Engagement Stream

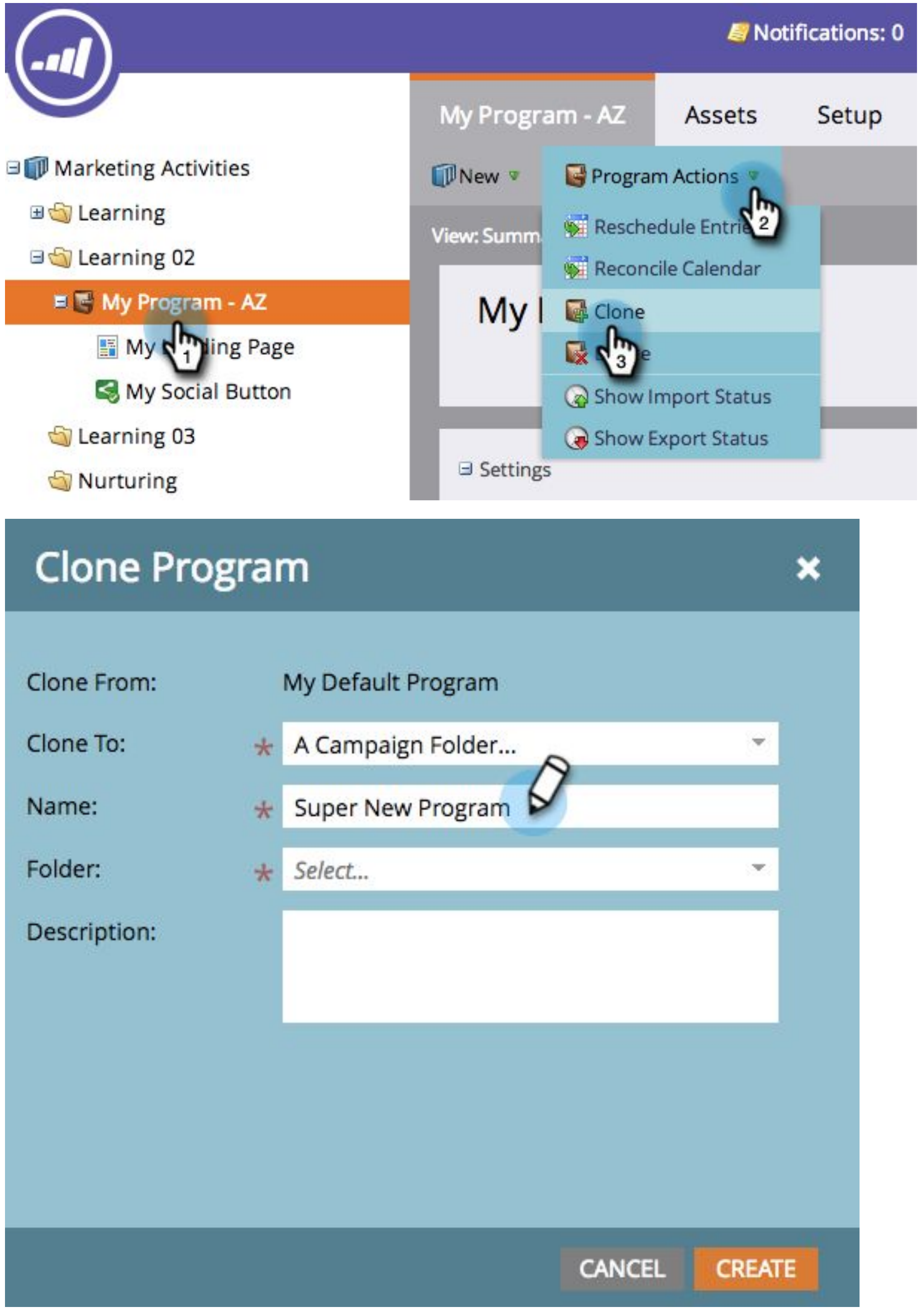
Naming Conventions - Assets

Email banner	EM-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PNG format
Landing page banner	LPB-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PNG format
Case Study	CS-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PDF format
Data Sheet	DS-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PDF format
Executive Summary	ES-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PDF format
Presentation	PRES-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PDF format
White Paper	WP-YYMMDD-[Asset name no spaces use - in-between words]A	Must be in PDF format
Thumbnail	THB-YYMMDD-[Asset name no spaces use - in-between words]	Must be in PNG format
Video	VD-YYMMDD-[Asset name no spaces use - in-between words]	
Headshot	firstname-lastname-year.png	Must be in PNG format
Landing page	LP-[Abbreviation of content type]-YYMMDD-[Use a hyphen '–' between words of asset name]	LP-CS-190808-Intro-to-IMO-Core
Thank you page	TY-[Abbreviation of content type]-YYMMDD	TY-WP-190909

Cloning

Cloning overview

- Cloning is making a copy of something in Marketo
- Once cloned, you can easily customize for a new initiative
- Marketo allows you to clone:
  - An individual asset (email, landing page, form)
  - A snippet (a content block in Marketo)
  - A presentation from the Marketing Calendar)
  - A report (local and global)
  - An entire program and all of its assets



Program setup

Period Cost

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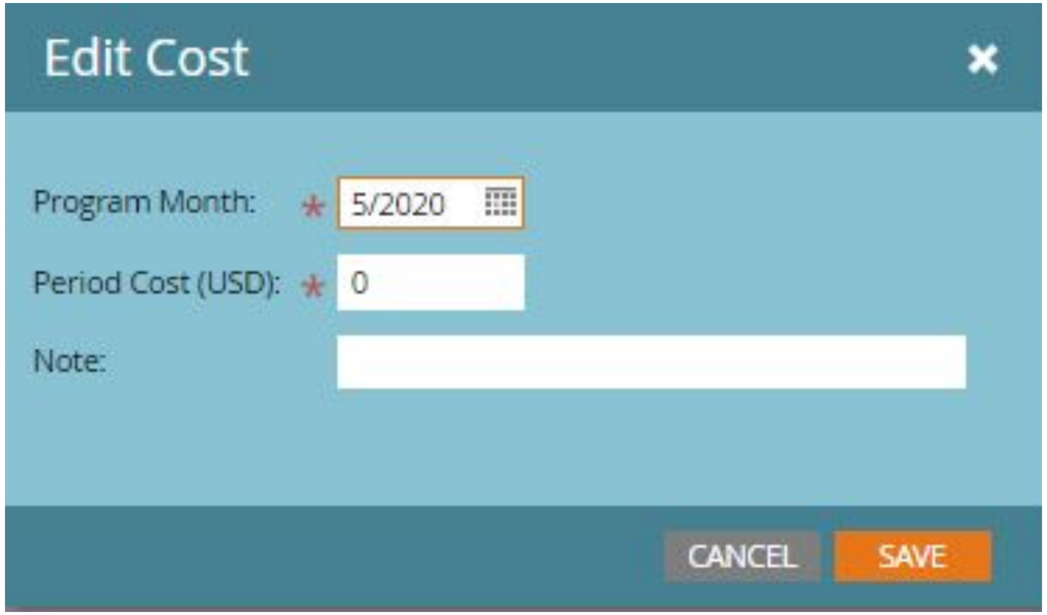
Period cost overview

Period costs refers to the amount spent on a program

- Period costs measure return on investment (ROI) for our programs
- The are added at the program level in the setup tab
- Period cost calculations
  - A period cost can cover one or more months
  - Currency is always in USD
  - Variable costs that you may want to include in your programs like agency fees, event costs and pay-per-click costs
  - Always always always add a period cost – even if it is 0
    - Some reports run on period cost so it is necessary we include it in all our programs



Tags

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Tags

Tags are used to describe programs.

You can make as many as you need, each with unique values.

Channels identify the delivery mechanism in a program, such as webinar, sponsorship, or online ad.

We use tags to help identify key attributes in a program when we report on program success.

Audience	Client
	Internal
	Prospect
Content Type	Blog Post
	Case Study
	Executive Summary
	Infographic
	Data Sheet
	White Paper
	Video
Region	North America
	Europe
Product	IMO Core
	IMO Core Periop
	IMO Core Procedure
	IMO Precision Acute Condition Sets
	IMO Precision Behavioral Health Sets
	IMO Precision Chronic Condition Sets
	IMO Precision Oncology Sets
	IMO Precision Periop Sets
	IMO Precision Reporting Sets

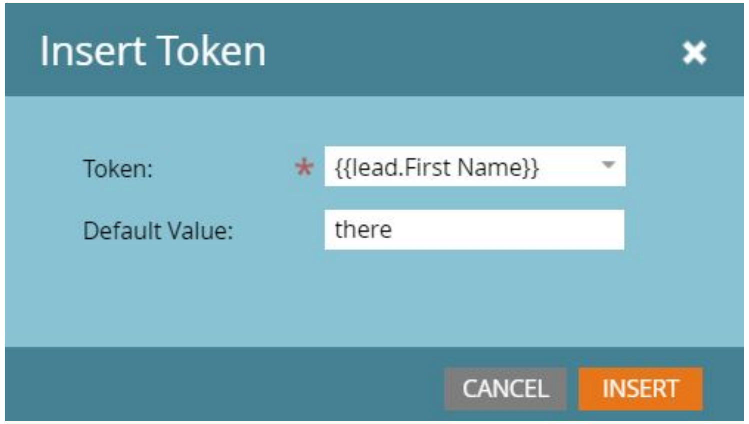
Activity: Add a period cost and tags

- Create a new email program and add in a period cost and tags
  - Content type: eBook
  - Region: North America
  - Product: IMO Core
  - Period Cost: $2000
  - Launch month: May

Tokens

What is a Token?

- A token is a variable which is available for use in Marketo automation smart campaign flow steps and creative assets (emails, landing pages, etc.)
- There are three types of tokens in Marketo
  - Lead Token – refers to values in the fields of person record (first name, title, city)
  - Company Token – refers to values in the company / account fields (industry, budget)
  - System – refer to system values (date, time, view as webpage)
- When you use a lead or company token, you also want to provide a default value to show if there is no value related to that token
  - Ex {{lead.First Name:default=there}}
    - Allows us to populate there if first name is empty – Hi {{lead.First Name:default=there}} ->
      - If empty – Hi there
      - If not empty – Hi John



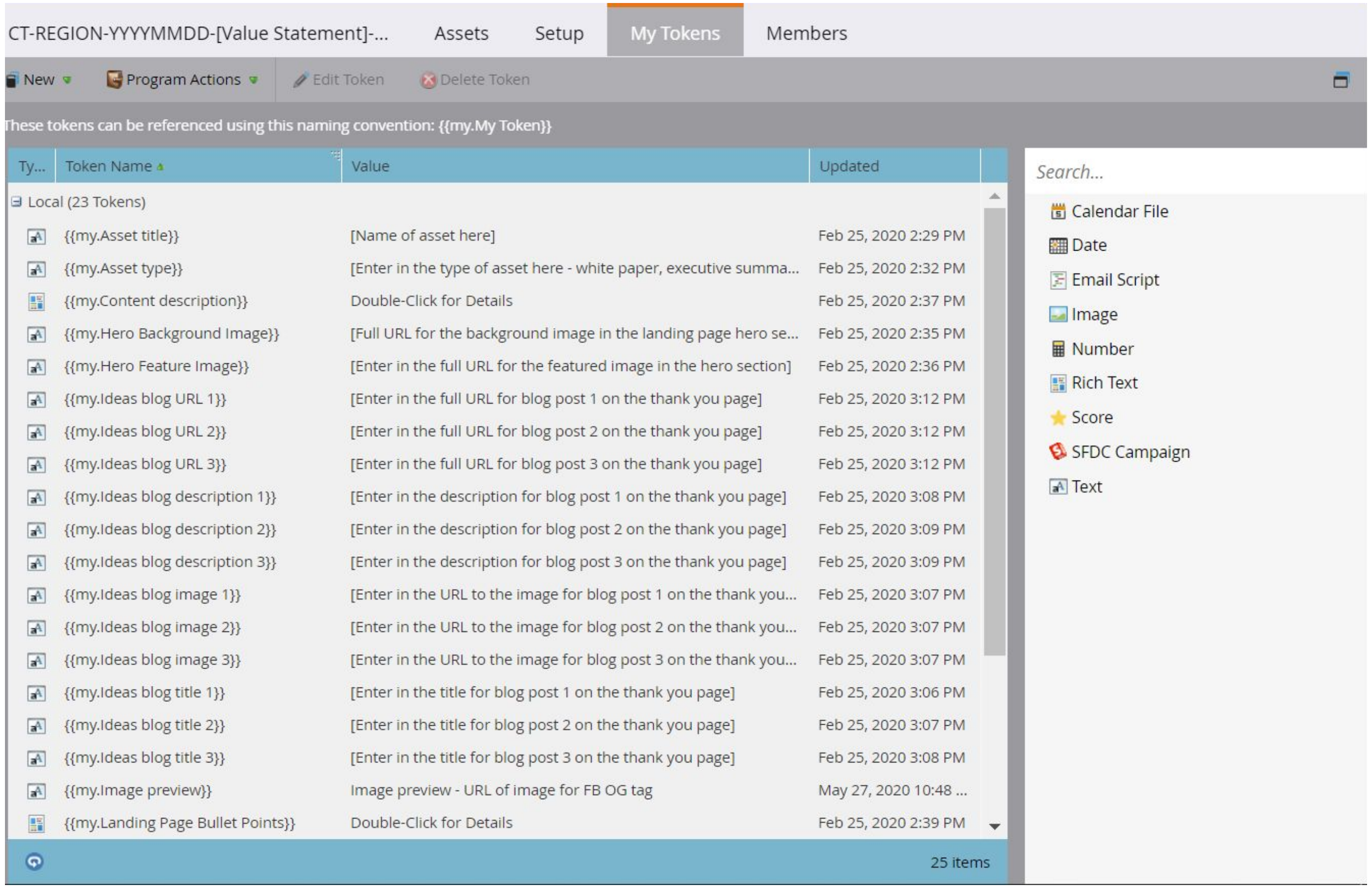
Understanding Tokens in Marketo

- My tokens help us simplify the process of launching a marketing program.
  - They are completely customizable and can essentially be placed anywhere on and landing page or email.
  - They pull information from the program level and allows us to auto-compete information within that program without having to open and edit any assets

- A lead token pulls a specific field value from a person's corresponding field in the database an inserts it into the designated space in an email or asset to create a personalized version

- A program token is specific only to the program you are operating in

- System token will pull a value at the system level of Marketo. These could be date or time related



AB Testing

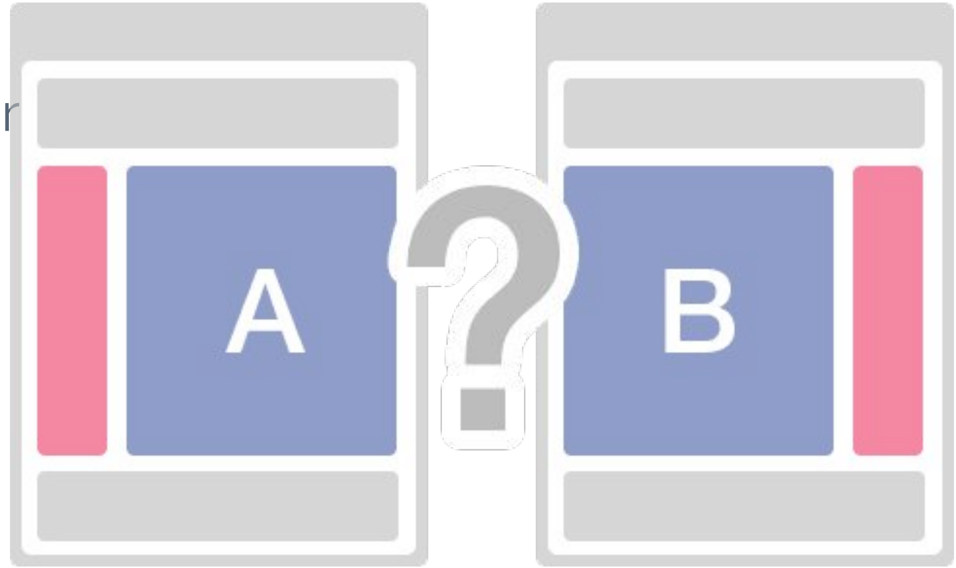
Activity

- **Clone the program template: Testing-EC-YYMMDD-[Progra Description] and:**

1. Create a new email and select the template
2. Enter an email subject line
3. Add a system token
4. Add a personalization Token
5. Replace the banner image
6. Remove modules
7. Add a preheader
8. Preview the email
9. Send yourself a sample
10. Approve the email content

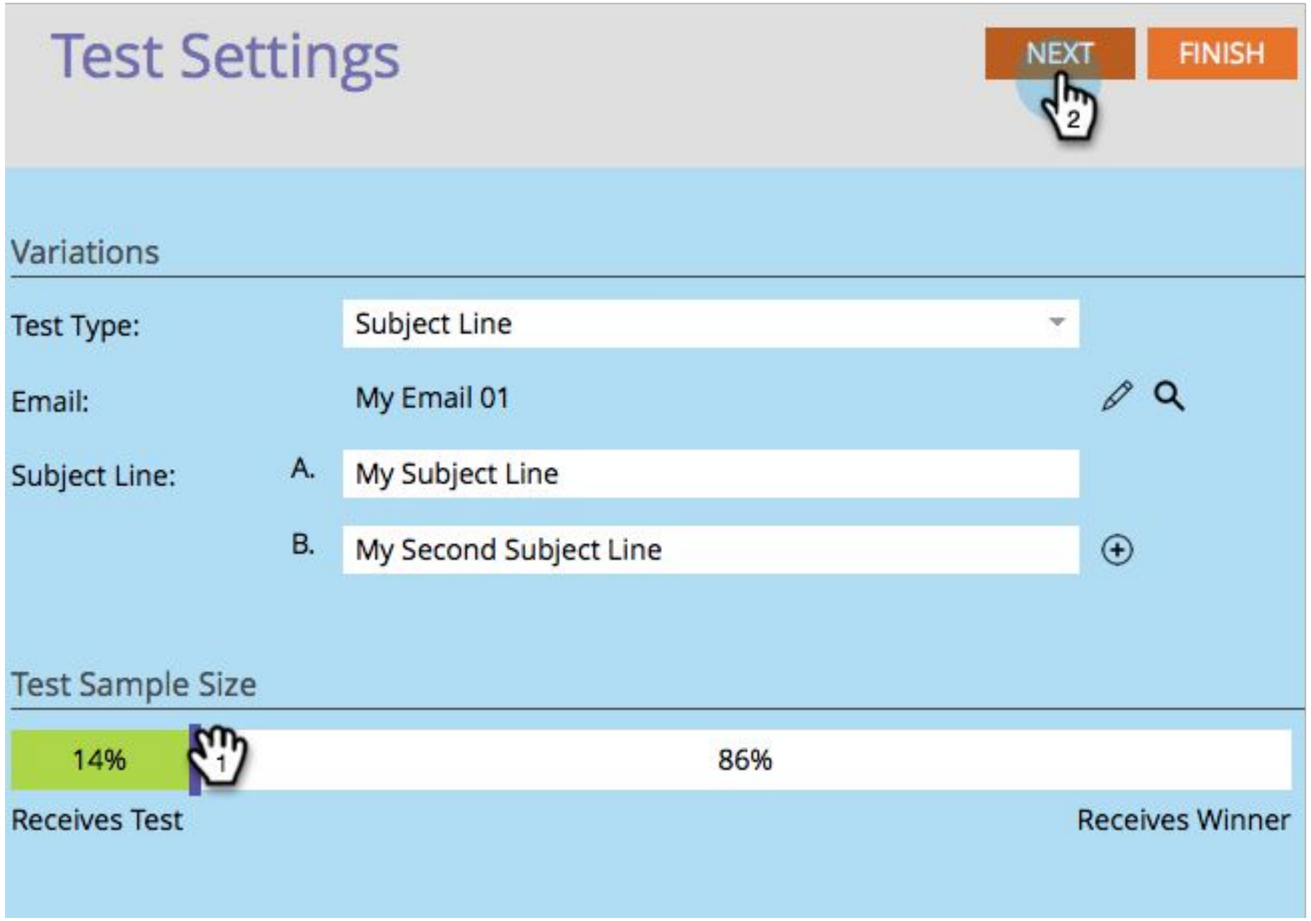
What is A/B testing?

- A process to identify which variable in an asset increase, or maximize, your desired outcome
  - Example: Two variations of an email are sent, and after a set amount of time has passed, the two emails are compared to see which performed better
- Common analytics used to determine a winner:
  - Open rate
  - Click rate
  - Click-to-open rate
  - Engagement score
  - Custom conversion



Activity: Create an AB test

- Use the email you just created to set up an AB test



End of lesson 3

- Assignment:
  - Complete CRM Sync and List and Data Maintenance in New to Marketo Learning Path in Marketo University
  - Complete email send assignment from lesson 1