11 MARKETO BEST PRACTICES

All of our customers ask what are the best practices you recommend for Marketo?

The answer is not that simple. Understanding AND respecting that each Marketo implementaion instance is unique dictates best practices to differ. Having said this, there is a foundation and core practices that can be applied to all campaigns and assure reducion of time and increase of results. So let's dive in.

You've got Marketo and it is up and running but still the question that comes to your mind is "Does my Marketo instance have all the best practices implemented?" Because you are looking for more innovative ways to give your marketing campaign a fantastic start and deliver continued returns. Year-after-year, customers get surrounded by more information and choices, thus sending targeted offerings to existing customers and prospects will be your top priority and focus. For marketers and Marketo implementers, it is a good time to adopt marketing practices that can help in the long-run by starting with a strong framework your Marketo campaigns can stand up to from beginning to end against your competitors and continue to deliver.

This whitepaper highlights 11 key Marketo best practices for the year 2016 to help you make the most of your marketing investment. By bringing into practice these tactics you will create compelling marketing campaigns for your business.

1. Be Human – Get engaged with customers on a personal level

In 2015, if you were using just company email to contact your customers you may have been able to reach much of the market's attention. However, now is the time where you should start sending emails from a personal ID, not just a company, to maximize on your target audience with better precision. People love a more personalized experience, or an email from someone who looks like a more realistic message, rather than just a robotic noreply@xyz.com Customers tend to digest offers more easily when emails are sent in a personalized way with some human factor added..

Here are 4 quick tips to help add a personal touch to your email

- Make use of customers' name (for example, Hey John, here is your 10$ FREE . . . coupon for you!)

- Personalize your email according to the gender

- Customize your message based on customers' habits and interests

- Surprise your customers by sending wishes on their birthday and/or other relevant occasion

> *"Remember by staying personal, hiting the mark with this intimate detail will open the door to you staying ahead of the competition"*

Adopt these tips to help you enhance your email performance and make your email marketing more targeted and successful.

2. Lead Tracking through Munchkin tracking code

Keep a closer eye on your visitors. You can facilitate tracking with the help of Munchkin tracking code.

There are 4 different options to use Munchkin tracking codes on specific pages which include the following:

- Idenify pages that do NOT need tracking: If you think some web pages don't need tracking, then don't add Munchkin tracking code. This is a good practice for those pages that have low marketing value, and it will also improve page performance for the pages that you do assign Munchin tracking to. By staying laser focused on the pages and items of those pages in your Munchkin tracker, the performance and reporting will be more powerful to your campaign reporting over all. Keeping the simplicity in mind of skipping pages that hold low market value, remember, It is recommended to place Munchkin tracking code on all pages that may have even minor potential to generate leads.

- Improving Page Performance by Using Munchkin: The second option is adding Munchkin tracking code, but don't forget to use cookie anonymous leads. It enables you to track the visits for existing leads, and restricts a new cookie to be created if no cookie is present. It is also a good practice for those pages that have low-value leads, and also improves page performance.

- Get the most from your webforms (even those that are not created from Marketo): If you have web form pages which are not generated by Marketo, you can insert Munchkin tracking code there for tracking as well.

- Custom tracking and the power of Munchinkin tracking: If you need to perform custom tracking, it can be easily done with a Munchkin tracking code. It can be quite helpful in multimedia content, too. In addition, you can also use Munchkin API to create events in your Marketo instance for activities performed by visitors for future analysis and follow-up responses.

"Munchkin will augment your efforts through their robust tracking codes here's how"

3. Give your unsubscribe page a positive look

Keep your unsubscribe page more interactive for effective subscription management. It is recommended to use the out-of-the-box Marketo unsubscribe field, rather than letting customers opt-out completely from your list, you invite them to subscribe to the interest, needs and types of info they want. It can be done through:

- Unsubscribe from entire mailing List
- Unsubscribe from specific mailing Lists
- Do not want to receive any e-mails from our company in the future or better yet allow for a frequency of delivery, such as receive monthly emails versus weekly as an example

"Always take the high road and make the ending as enticing and the beginning BUT keeping it in the tone of diligently delivering their request... to end the relationship, however, also apply these principles for getting the most of this position and request by your lead or customer"

4. Track accurate lead sources

It is always a challenge to track and capture accurate lead sources. In fact, lead source is a very important piece of information to better analyze the value of your marketing campaigns. Plus, it also helps in proper lead management. In order to get better reporting on accurate lead sources, you need to perform some customization (such as custom javascript, new fields, or hidden fields) to capture lead sources effectively. Here are top lead source best practices:

- Remove all clutter from your lead source
- Keep the lead source uniform
- From time to time audit the lead source of closed opportunities
- Check the success rate of leads based on the lead sources
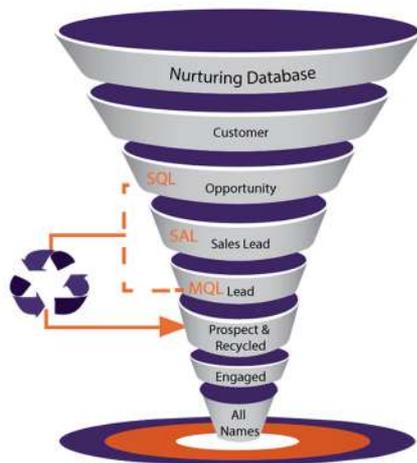
> "Staying accurate by and using these tools and methods properly will take the pain out of the campaign and provide you the extra time needed to focus on your sales end target of your funnel"

5. Leverage Marketo Lead Lifecycle Management to improve sales

Once you start building and improving your lead scoring, it is essential to keep a close eye on your overall revenue cycle. Make use of Marketo lead lifecycle management to boost sales and marketing alignment.

- Give your new lead scoring a proper position in your revenue cycle
- Make sure no lead is left behind
- Once a lead is received, determine whether to promote the lead or recycle it back into the fold
- Track sales as you follow-up with newly scored and prioritized leads
- Label lead scores to take better sales action

6. Use customized Marketo Forms 2.0

Getting a fuller understanding of Marketo's forms capabilities can help you get more exciting results. Marketo forms are amazingly flexible and can be customized to your company's exact needs and requirements. You can also build customized form behaviors to capture better insights through:

- Building dynamic fields
- Setting the length of individual fields
- Pre-populate fields based on lead answer
- Make check boxes mandatory, although use this option wisely. Remember, keep it simple to capture data, use your tools to generate smart fields and remember repeated fields so that they either are preloaded with their info or remove that repeated field all together so that the lead is not frustrated, discouraged and leaves
- Think about dymanic follow up pages
- Leverage Slider Field type for example for revenue of number of employees
- Pick what you want to auto populate
- Define field dependency so that you can follow up questions based on answers to the previous one
- Use consistent format validation for each form input

Use Marketo Forms intelligently

Plus remember, it is not a good idea to create Marketo forms for every activity. It is better to use them diligently for keeping things easy-to-manage. For example, whether you use basic form setup, progressive profile or advance forms, less number of forms is always better. Consolidate it to these areas for easy filtering and quick analysis.

7. Use Program Statuses for better reporting

Everyone wants to get good and accurate reporting, and program statuses (formerly known as progression statuses) In order to achieve accuracy they every program you create in Marketo should have 3 folders under it (Campaign Logic, Program Statuses and Local Assets). Also, don't forget to add your period costs when you setup your programs if you want to see them in RCE.

8. Lead generation through content marketing

Remember you are creating quality content to promote your service or product in the market, and engage more and more the right type of prospects. Thus, make sure you are directing your unique content to Marketo landing pages so that you trap more opportunities. The more wideness you create with your content among your audience, the more there will be the chances to create leads.

9. Lead scoring for driving more revenue

There are many leads that are sales-ready. Lead scoring facilitates marketing and sales teams recognize ready-to-buy opportunities, and also, those leads that require ongoing nurturing. With demographic targetting and engagement, companies can generate more productivity, and increase revenue quickly.

" B2B marketers who emphasize lead volume over lead quality reduce sales efficiency, increase campaign costs, and fuel the gap between sales and marketing.
To generate qualified demand, marketers need technology and processes that capture lead quality information; validate, score, and classify leads; develop programs to nurture leads that don't yet warrant sales attention; and define metrics that directly identify marketing's contribution to the sales pipeline and closed deals."

– Laura Ramos, Forrester Research, Improving B2B Lead Management

10. Filter out competitor list

To stay ahead of the competition curve, you need to keep a close eye on your rivalry. Dedicate time to analyze and know what the competition is doing. Hinder your competitors from seeing any of your email content. Black list and exclude them from your master email list. Plus, it will also help you get more accurate reporting and stats about the campaign in Marketo when you keep your lists groomed.

11. Save time with the Sales Insight plugin for Outlook or Gmail

Sales insight plug-in is designed to manage interactions with minimum effort. It helps you save time on creating new cases, quickly adds opportunities & leads into your CRM system, and manages your client relationships or any lead info with ease! Only Marketo has built tailor-made applicaions for Salesforce.com and Microsoft Dynamics CRM. Your sales team will have the information right in front of them and this enables them to take actions on important leads immediately. This sets you apart from your competitor. Time is important.

That's all for now! We believe these mentioned practices will give you some ideas to improve quality leads and increase sales volume with improved marketing practices. Marketo has great capabilities for multichannel marketing to drive revenue.

Marrina Decisions has a proven track record of helping clients execute multi-channel campaign execution utilizing their expertise and detailed processes, and we'd like to help you do the same. Contact us today to find out how we can bring winning results to your next marketing campaign.

LEARN MORE ABOUT MARRINA DECISIONS

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