



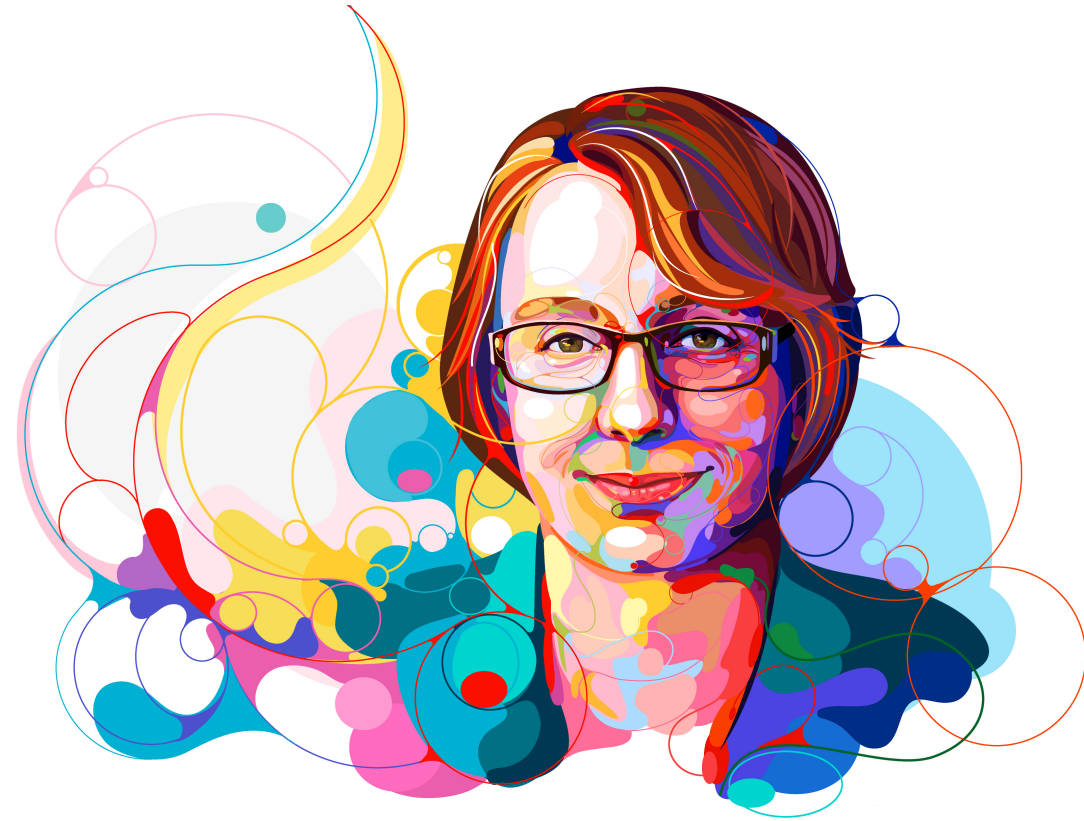
Learn to Leverage Your (Program) Status

Julz James | July 2020

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Jon Noorlander

Introduction

- 7yrs+ Marketo Experience
- 20yrs Marketing Experience
- 6 x Marketo Champion
- MCE since 2015
- Marketo Training



Agenda

- Overview
- Setting up and using Program Statuses
- SFDC Campaign Sync
- Reporting
- Questions

What are Program Statuses?

- **Program statuses** are the steps people go through in a program (e.g. Invited, Registered, Attended, No Show). These steps are defined by the Marketo Engage Channel.
 - **Determined by Channel:**
 - Add statuses to channels in Marketo Engage
 - Statuses used to track success (or not) of a campaign
 - **Associated with a Step Number:**
 - Determine correct flow of lead through statuses
 - Prevent people going backwards through statuses
 - **Identify Success Statuses**
 - Specific success statuses define when person has achieved success in a campaign
- **Note:** Only people with a **Mobile Check-in Status** of **Registered** and **Attended** will be visible in the **Mobile Check-in Apps**.

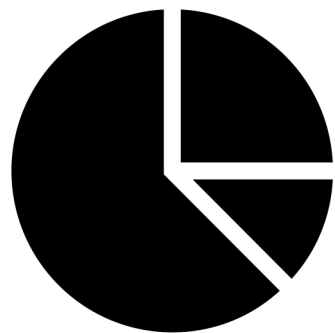
What does it look like?

- Members broken out by Program Status on Program Summary tab
- Success Statuses marked with a green checkmark

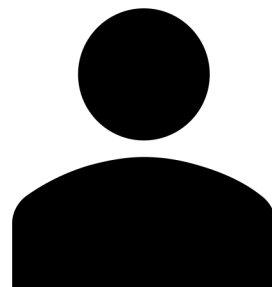
Results	
Total Members:	217
Acquired By:	0
Socially Acquired:	Calculate
Success: ✓	124
Members by Program Status	
Invited:	0
Pending Approval:	0
Rejected:	0
Wait Listed:	0
Registered:	0
Waitlisted:	0
Canceled:	0
No Show:	93
Downloaded: ✓	0
Attended: ✓	30
Attended On-demand: ✓	94

Why is it important?

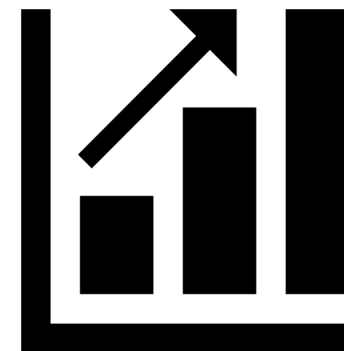
Tracking, tracking, tracking!



Effectiveness of Marketing Campaigns



Lead Behaviors



Marketing Influence



Setting up and using Program Statuses

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How to set up statuses

Admin

My Account

Security

Login Settings

Users & Roles

Audit Trail

Location

Smart Campaign

Email

Communication Limits

Marketo Sky

Tags

Tag Type

Channel

Advertising

Content

Content Syndication

Customer Reference

Digital

Direct Mail

Email

Email Send - Multiple

Event

Lead Lifecycle

List Acquisition

Mobile In-App

Nested Nurture

Nurture

Nurture Email

Operational

Partner Referral

How to set up statuses

Edit Channel

Channel: * Email

Applies to: Email

Analytics Behavior: Inclusive (regardless of period cc ▾)

Program

To reorder, change the step number

Status	Step	Success	Hide	Delete
Sent	10	<input type="checkbox"/>	—	
Opened	20	<input type="checkbox"/>	—	
Clicked	30	<input type="checkbox"/>	—	
Engaged	40	<input checked="" type="checkbox"/>	—	
Engaged Accelerat	50	<input checked="" type="checkbox"/>	—	

ADD STEP

What Program Statuses should I use?

Marketo Channel	Channel Statuses	Marketo Channel	Channel Statuses	Marketo Channel	Channel Statuses
Online Advertising	Clicked - Response; Viewed - Response; Responded - Response	Internal Comms - Employees	Member; Engaged - Response	Email Blast	Added; Sent; Opened; Clicked - Response; Converted - Response; Unsubscribed
Blog	Viewed - Response;	Lead Generation	Added; Outreach Started; Contacted - Response; Not Interested - Response; Exhausted; Wrong point of Contact	Email Send (Email Send Program Type ONLY)	Added; Sent; Opened; Clicked - Response; Converted - Response; Unsubscribed
Channel Events	Added; Sent Invite; Invite Bounced; Opened; Clicked; Interested - Cannot Attend - Response; Registered - Response; Declined - Response Meaningful Conversation - Response; Attended - Response Did Not Attend - Response; Wrong Person	Nurture	Sent; Opened; Clicked - Response; Downloaded - Response; Responded - Response; Added; Engaged - Response; Exhausted; Removed	Field Events	Added; Invite Bounced; Sent Invite; Clicked; Opened; Attended - Response; Declined; Did not attend - Response; Interested - Cannot Attend - Response; Meaningful Conversation - Response; Pending; Registered - Response; Wrong Person

How to change statuses

New Program ✕

Campaign Folder: * Julz Test

Name: * Form Fill Test

Program Type: * Default

Channel: * Content

Region: * Global

Description:

CANCEL CREATE

Settings	
Channel:	<u>Content</u>
Created:	July 14, 2020 1:18 PM CDT by Juli James
Last Modified:	July 14, 2020 1:18 PM CDT
Salesforce Campaign Sync:	• <u>not set</u>
Results	
Total Members:	0
Acquired By:	0
Socially Acquired:	<u>Calculate</u>
Success: ✓	0
Members by Program Status	
Visited:	0
Engaged: ✓	0

How to change statuses

Smart Campaign Smart List

Fills Out Form 🔄 ✕

➤ Add Constraint ▼

Form Name: is 📄 ▼ Asset Download + ▼

Web Page: is ▼ Template - Clone This.01 Entry Page + ▼ 📄 ✕

Smart Campaign Flow Step

1 - Change Program Status 🔄 ✕

➤ Add Choice

Program: Form Fill Test ▼ New Status: Content > Engaged ▼

Set Success Status [important!]

- Don't forget that you must have **at least one status** that is your measure of success.
- Think about what that status will be - changing it can be time consuming and affects past reporting
- Success in Marketo Engage = Responded in SFDC
- Used for Reporting





SFDC Campaign Sync

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Why should I use the SFDC Campaign sync?

- Great way to ensure statuses are correct in SFDC Campaigns
- Update Program and Period Costs directly from Marketo Engage
- Saves time
- No extra flow steps in Smart Campaigns

When should I NOT use SFDC Campaign Sync?

- If you don't have all your leads/contacts sync'd to SFDC
 - **1:1 sync will push all records into SFDC**
- If you have large amounts of data
 - **1:1 sync can cause delays**
- If you only have LEADS in Marketo Engage and not in SFDC and want to only sync CONTACTS across using Custom Sync Rules
- In these cases use the "Change Status in SFDC Campaign" flow step instead

How do I do it?

- Make sure your Salesforce campaign sync is enabled first
 - <https://docs.marketo.com/pages/releaseview.action?pageId=4719289>

Salesforce Campaign Sync:

• [not set](#)

Salesforce Campaign Sync

Campaign:

Salesforce Campaign Sync

Campaign:

Name:

Description:

How do I do it?

- This is what it will look like when set up and complete

Form Fill Test

Settings

Channel: [Content](#)

Created: July 14, 2020 1:18 PM CDT by Juli James

Last Modified: July 20, 2020 7:22 PM CDT

Salesforce Campaign Sync: [Form Fill Test](#)

Results

Total Members: 0

Acquired By: 0

Socially Acquired: [Calculate](#)

Success: 0

Members by Program Status

Visited: 0

Engaged: 0

Campaign Member Status Form Fill Test

Current Campaign: [Form Fill Test](#) Status: **Planned**

Type: Content Active:

Member Status Values

[Edit](#) [Replace](#)

Status	Responded	Default
Visited	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Engaged	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Reporting

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Where should I do my reporting?

- Business Driven
- But... Marketo does some nice 'at a glance' reporting to look at program or channel success
 - **Program Performance Report**
 - Program Analyzer
 - In-Depth Reporting using Advanced Report Builder
- SFDC Reporting
 - Marketing Influence using Campaign Responses

Program Performance report

The image displays a grid of 18 program performance report icons, each consisting of a circular icon and a text label below it. The icons are arranged in three rows of six. The 'Program Performance' icon, located in the second row, third column, is circled in black. The background of the grid is a blue sky with a scenic view of a town built on a hillside overlooking a body of water.

Email Performance	People Performance	Web Page Activity	Opportunity Influence Analyzer	Program Analyzer	Success Path Analyzer
Email Insights	Engagement Stream Performance	Program Performance	Email Link Performance	Social Influence	People By Revenue Stage
Landing Page Performance	People By Status	Company Web Activity	Sales Insight Email Performance		

Program Performance report

Program Performance		
Report		Setup
New Report Actions Edit Delete		
Ty...	Name	Value
Settings		
	Export Rows Available	5,000
Filters		
	Programs	Selected Programs

Program Filter ✕

Search...

- Default
- 2019 Marketing Activities
- 2020 Marketing Activities
 - 2020 Customer Marketing
 - 2020 New Logo (Demand Generati
 - 2020 Partner Marketing
- Ongoing Marketing Activities
 - Content
 - Global Website
 - Nurture (Engagement)

CANCEL APPLY

Search...

- Settings
 - Export Rows Available
- Filters
- Tags
 - Channel
 - Offer Type
 - Region
 - Social Channel
 - Tactic
 - Tactic Email
 - Tactic Engagement
 - Tactic Event
- Archived Programs
- Period Cost
- Programs

Program Performance report

Program	Channel	Total Members	New Names	New Names %	Success	Success %...
	Webinar	299	240	80.27%	297	99.33%
	Webinar	211	95	45.02%	200	94.79%
	Webinar	740	46	6.22%	67	9.05%
	Email Send - Multiple	243	0	0%	21	8.64%
	Advertising	81	73	90.12%	63	77.78%
	Event	28	0	0%	2	7.14%
	Event	784	332	42.35%	396	50.51%
	Event	1832	57	3.11%	98	5.35%
	Webinar	469	199	42.43%	218	46.48%
	Advertising	239	198	82.85%	100	41.84%

SFDC Reporting

SFDC Report	Report Insights
Campaign Leads or Campaign Contacts Reports	List the leads or contacts associated with your campaigns
Campaign Member Report	View campaign members by campaign
Campaign Member Analysis	Summarize information about who has responded to campaigns
Campaign Revenue Report	Analyze which opportunities have resulted from your campaigns
Campaign ROI Analysis Report	Calculate the return on investment (ROI) and average costs for your campaigns
Campaigns with Influenced Opportunities	View opportunities that have been influenced by multiple campaigns

SFDC Reporting

- Campaign Statistics

▼ Results - This Campaign

Num Sent in Campaign	0	Opportunities in Campaign	877
Responses in Campaign	3,273	Value Opportunities in Campaign	USD 9,###.04
Response	0.00%	Won Opportunities in Campaign	110
Contacts in Campaign	1,493	Value Won Opportunities in Campaign	USD 2,###.16
Leads in Campaign	3,165		
Converted Leads in Campaign	1,412		

▼ Results - All Campaigns in Hierarchy

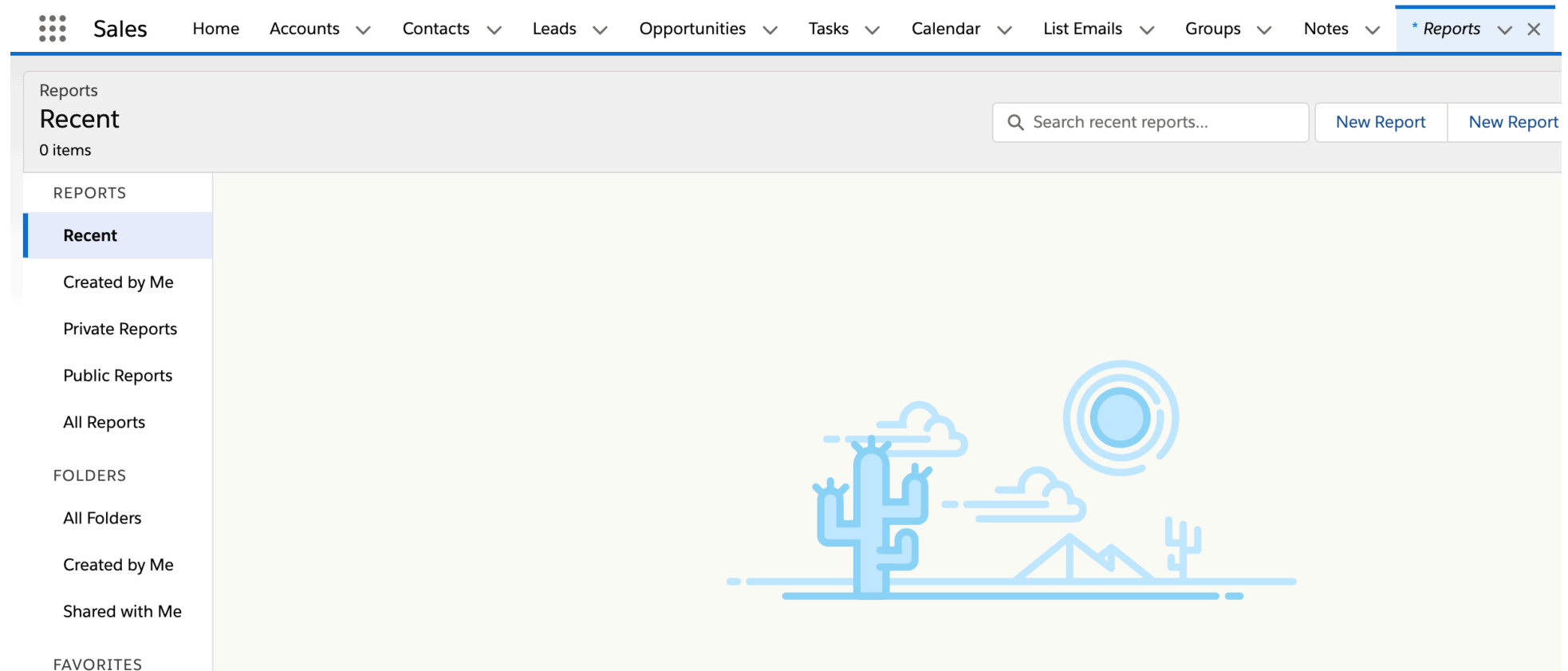
Actual Cost in Hierarchy	USD 10,000.00	Opportunities in Hierarchy	1,135
Budgeted Cost in Hierarchy	USD 10,000.00	Value Opportunities in Hierarchy	USD 11,###.54
Expected Revenue in Hierarchy	USD 0.00	Won Opportunities in Hierarchy	138
Num Sent in Hierarchy	0	Value Won Opportunities in Hierarchy	USD 3,###.52
Responses in Hierarchy	4,470		
Contacts in Hierarchy	2,027		
Leads in Hierarchy	4,489		
Converted Leads in Hierarchy	1,915		

SFDC Reporting

- Campaigns with Marketing Influence
 - Ways to show Marketing Influence
 - A Campaign is associated to a Contact Role on the Opportunity. This means that the Contact that is assigned to a Contact Role on an Opportunity is a member of a Campaign.
 - Use of the **Add to Campaign** button on the Campaign Influence related list on the Opportunity record (Campaign Influence 1.0 only).
 - Enter a Campaign in the **Primary Campaign Source** field on the Opportunity record.

SFDC Reporting

- Campaigns with Marketing Influence



The screenshot displays the Salesforce Reports interface. At the top, a navigation bar includes 'Sales' and various object tabs: Home, Accounts, Contacts, Leads, Opportunities, Tasks, Calendar, List Emails, Groups, Notes, and Reports. The 'Reports' tab is active, indicated by a blue highlight and a close button. Below the navigation bar, the 'Reports' section is titled 'Recent' and shows '0 items'. A search bar with the placeholder text 'Search recent reports...' and two 'New Report' buttons are present. On the left, a sidebar menu lists navigation options: REPORTS (with 'Recent' selected), Created by Me, Private Reports, Public Reports, All Reports, FOLDERS (with 'All Folders', 'Created by Me', and 'Shared with Me'), and FAVORITES. The main content area features a light blue illustration of a desert landscape with a cactus, mountains, and a sun.

SFDC Reporting

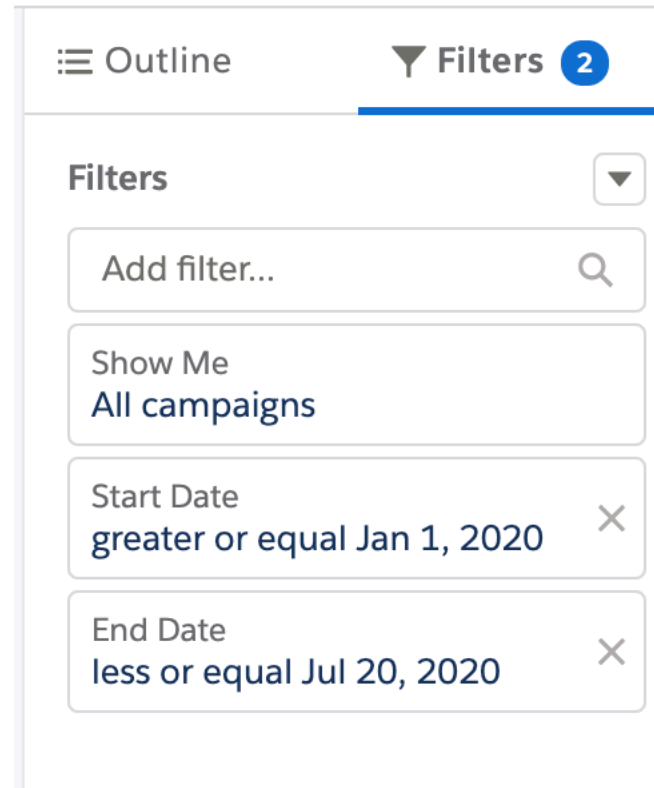
- Campaigns with Marketing Influence

The screenshot shows a 'Choose Report Type' dialog box. On the left is a sidebar with categories: All, Accounts & Contacts, Opportunities, Forecasts, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. On the right is a list of report types with a search bar at the top. The report type 'Campaigns with Influenced Opportunities' is selected and highlighted in blue. At the bottom right are 'Cancel' and 'Continue' buttons.

Choose Report Type	
	<input type="text" value="Search Report Types..."/>
	Campaigns with Opportunities and Trip Report
	Campaigns with Marketing Touches and Opportunities
	Campaigns with Temporary Marketing Touches and Opportunities
	Campaigns with Campaign Members
	Campaigns with Leads and Converted Lead Information
	Campaigns with Influenced Opportunities
	Campaign with Campaign Members (UTMs)
	Campaign Opportunity Report
	Contacts w Campaign History

SFDC Reporting


- Campaigns with Marketing Influence





The screenshot shows a reporting interface with two tabs: 'Outline' and 'Filters'. The 'Filters' tab is active, indicated by a blue underline and a blue circle with the number '2'. Below the tabs, there is a 'Filters' section with a dropdown arrow. Underneath, there is an 'Add filter...' input field with a search icon. Below that is a button labeled 'Show Me All campaigns'. At the bottom, there are two filter conditions: 'Start Date greater or equal Jan 1, 2020' and 'End Date less or equal Jul 20, 2020', each with a close icon (X).


SFDC Reporting


- Campaigns with Marketing Influence


Groups 


 GROUP ROWS


Add group... 


Opportunity Name 


Opportunity: Created Date 


 GROUP COLUMNS


Add group... 


Columns 


Add column... 


Responded 

Primary Campaign Source 

Contact Name 

Role 

Opportunity Amount 

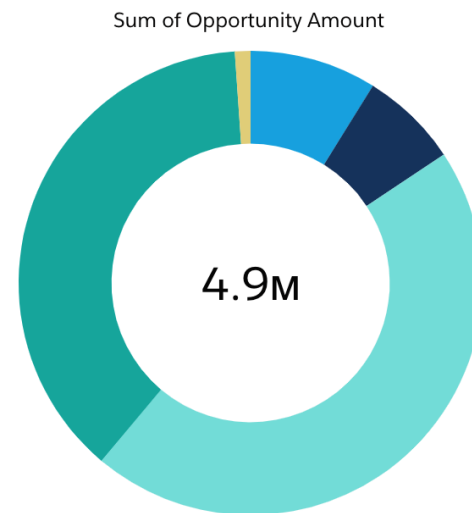
Stage 

SFDC Reporting

- Campaigns with Marketing Influence

Total Records
1,286

Total Opportunity Amount
USD 4,



Opportunity: Created Date

- Q3 CY2019 ●
- Q4 CY2019 ●
- Q1 CY2020 ●
- Q2 CY2020 ●
- Other ●

Takeaways/Wrap Up

- Take time to think through all the statuses that each channel could use
 - What is your true measure of success?
 - How granular do you want your reporting to be?
- Do you need to use a 1:1 Campaign Sync
 - Think about business use cases for when it should and shouldn't be used.
- Decide where is best for reporting
 - Make use of Marketo Analytics for at-a-glance reports
 - For more in-depth reports look at Advanced Report Builder
 - Use SFDC Campaign Reports to show Marketing Influence



Thank You!

Questions?

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