



The Nitty Gritty of Next Level Nurtures

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Housekeeping Notes



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Introduction



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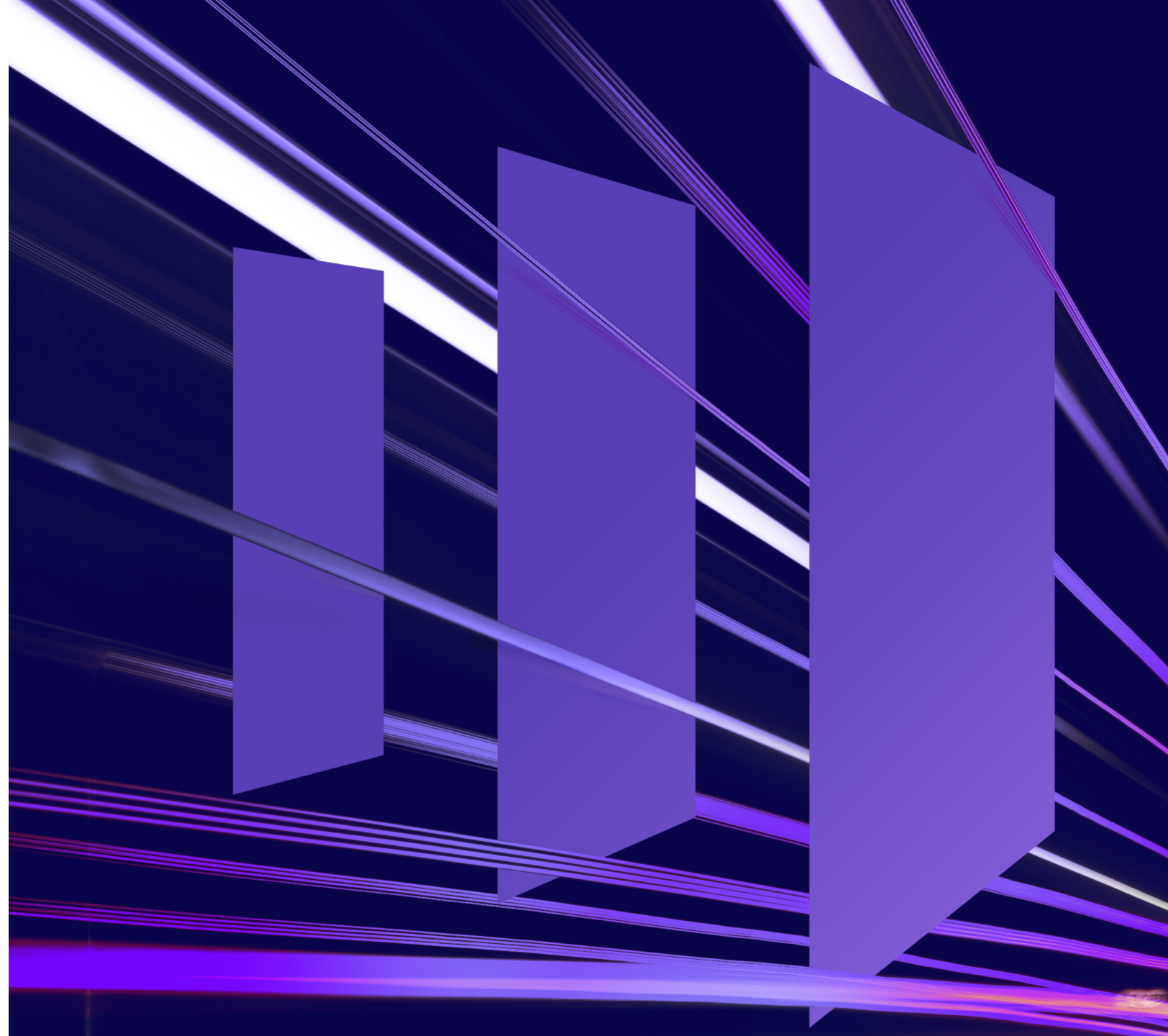
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OVERVIEW

Nurture Programs in Marketo

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- Q & A



Nurture Basics



What is a Marketo Engagement Program?

NURTURE VS ALL OTHER ACTIVITIES IN MARKETO



Marketo's Engagement Programs allow the marketer to create personalized nurture journeys for leads at scale.

By providing a variety of content and different options for frequency of communication, the marketer can nurture large groups of leads without having to build massive logic programs or rely on batch and blast campaigns that serve the same content to all leads disregarding their current progress.

Upside: Automated

Downside: Black Box



Nurture vs. Drip

DECIDING WHEN TO USE A DRIP PROGRAM AND WHEN TO USE NURTURE

Scenario	Use Drip	Use Nurture
Need to send 1 - X emails when lead takes a specific action. Order and timing will never change. You want everyone to get every email.	X	
Want to communicate with leads in mass or as they are added to the database with content specific to their interests/progress. You want to be able to stop communications or change the messaging based on specific behaviors.		X



Glossary

DEFINITIONS FOR COMMON TERMS IN MARKETO ENGAGEMENT PROGRAMS

Terms	Definitions
Audience	Member of Engagement Program.
Engagement	Interaction with a local email in the nurture program.
Stream	A list of assets (content) to be shared with program members (limit 25 per program).
Cast	A send scheduled by the nurture program. Anyone qualifying to get an email at that time will receive one.
Cadence	The day, time and frequency of a cast for a specific stream.
Transition Rules	The laws that govern movement from one stream to another
Program Status	Separate from streams, subgroups of your program based on behavior or responses (set in Admin for all Engagement Programs).
Pause / Normal	Refers to the cadence, determines if program members can qualify for the next cast or not
Exhausted	Program member has currently received all available content in their current stream.



Nurture Setup



Before You Start

ENSURING YOU ARE ARMED WITH ALL THE ITEMS YOU WILL NEED TO NURTURE

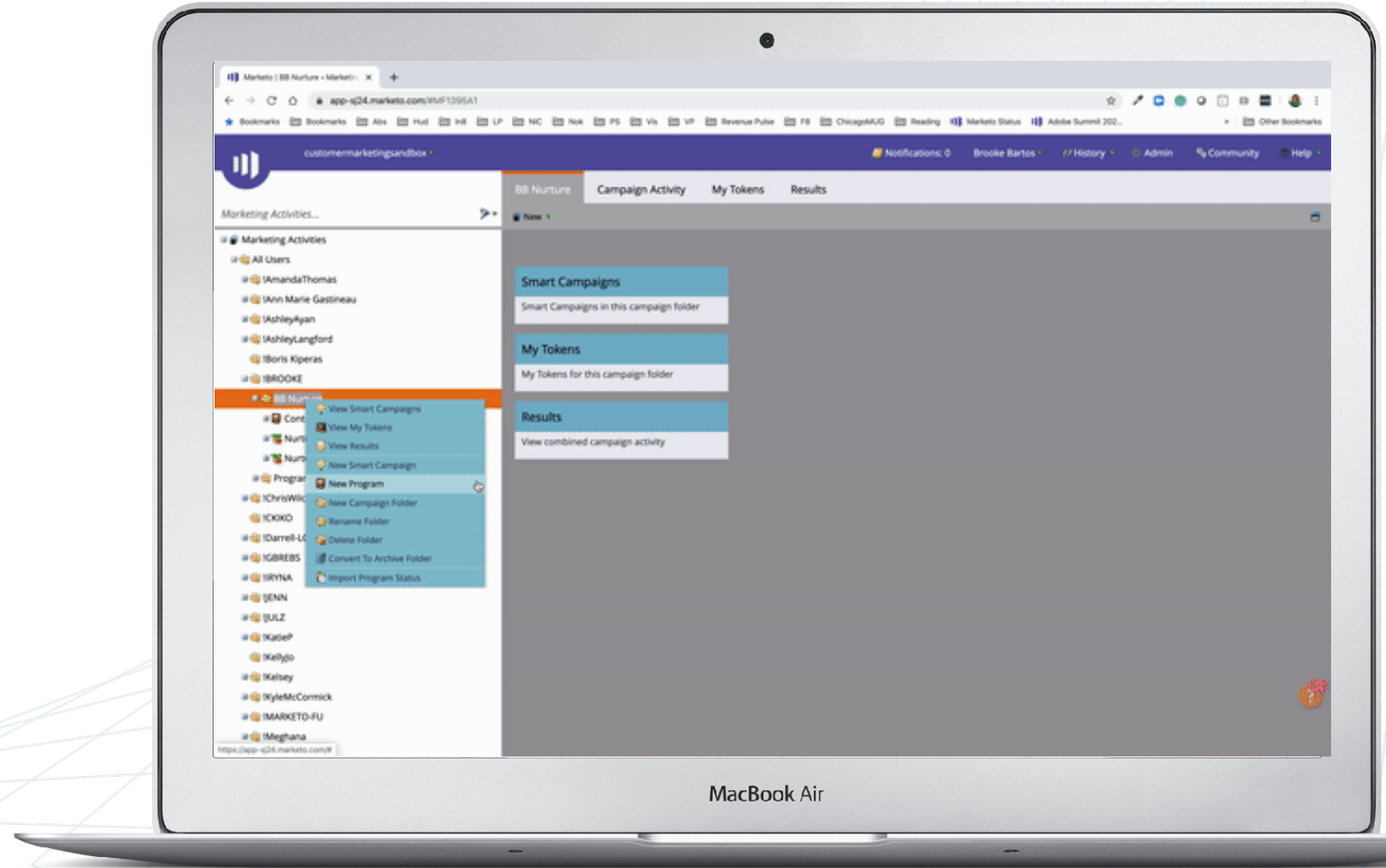
- Create a content inventory
- Determine who your audience will be and how they will progress through the content
- Define your KPIs for Nurture Success



Creating an Engagement Program

BASICS FOR PROGRAM CREATION

- Create Program
- Sync to/create SFDC Program
- Turn Program Off
- Notifications Y/N?



Streams

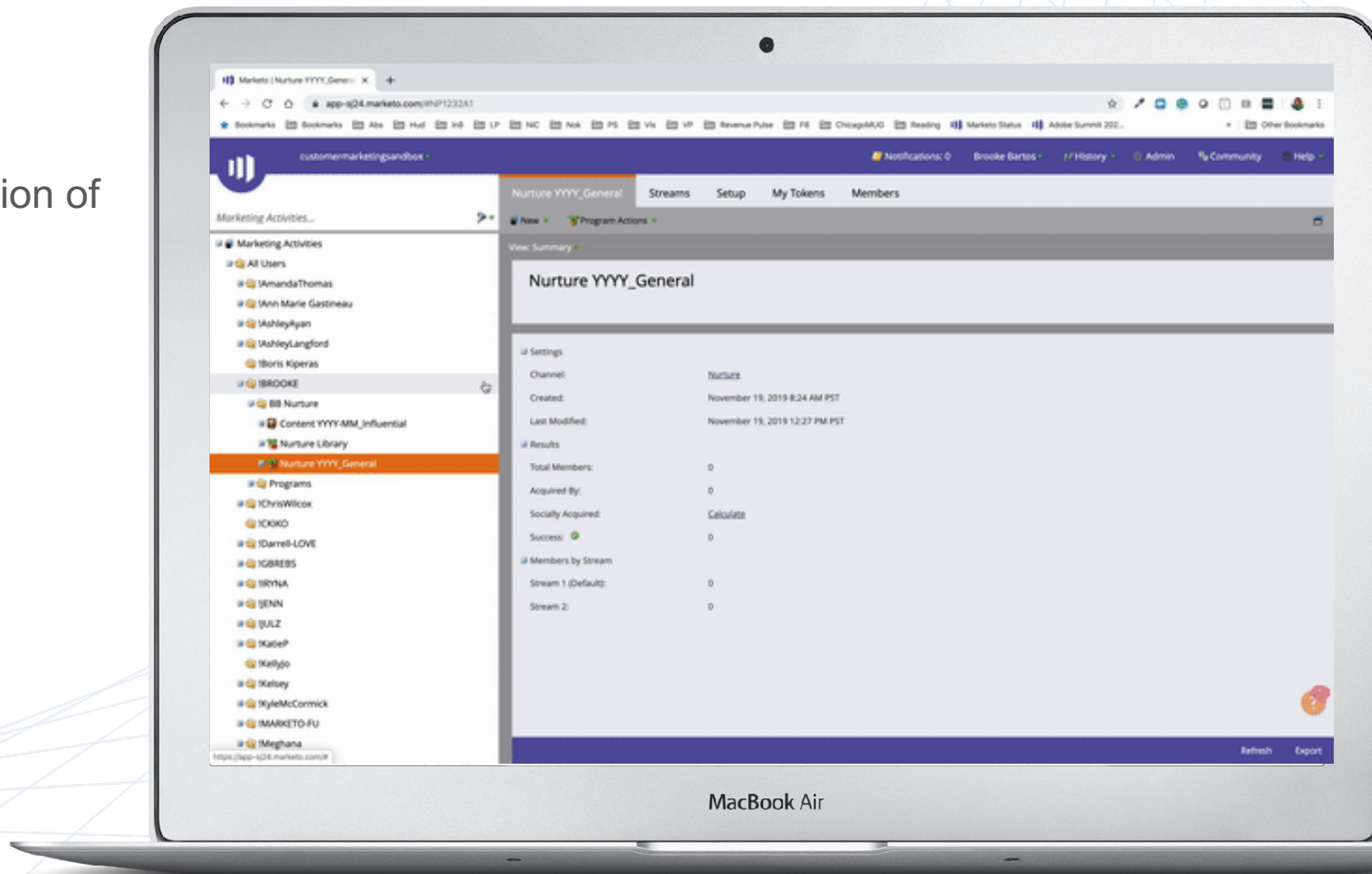
CREATING AND MANAGING

Create a Stream for each subdivision of your audience or journey.

Streams can be created via:

- Add Stream
- Cloned

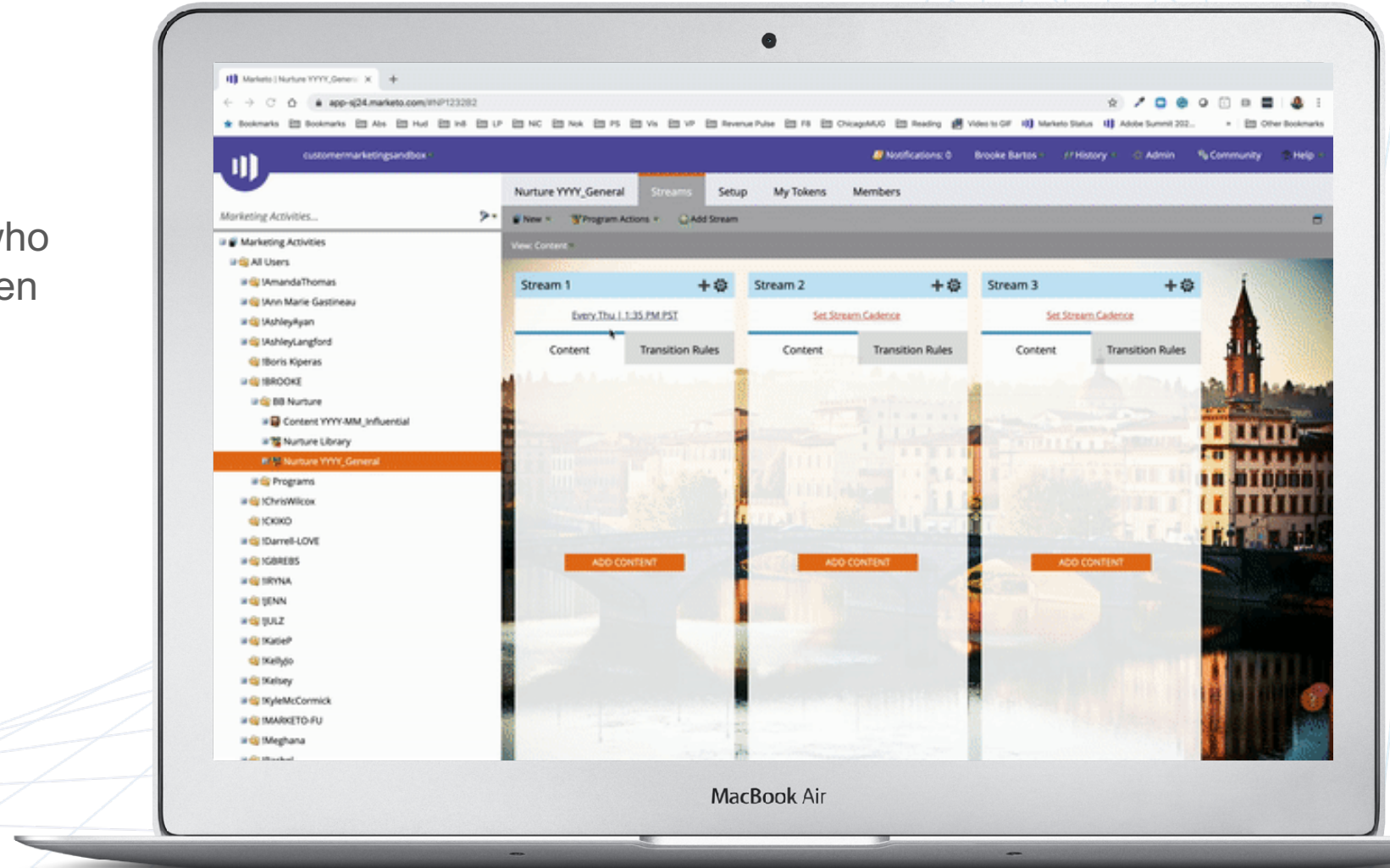
Rename as desired.



Cadences

CREATING AND MANAGING

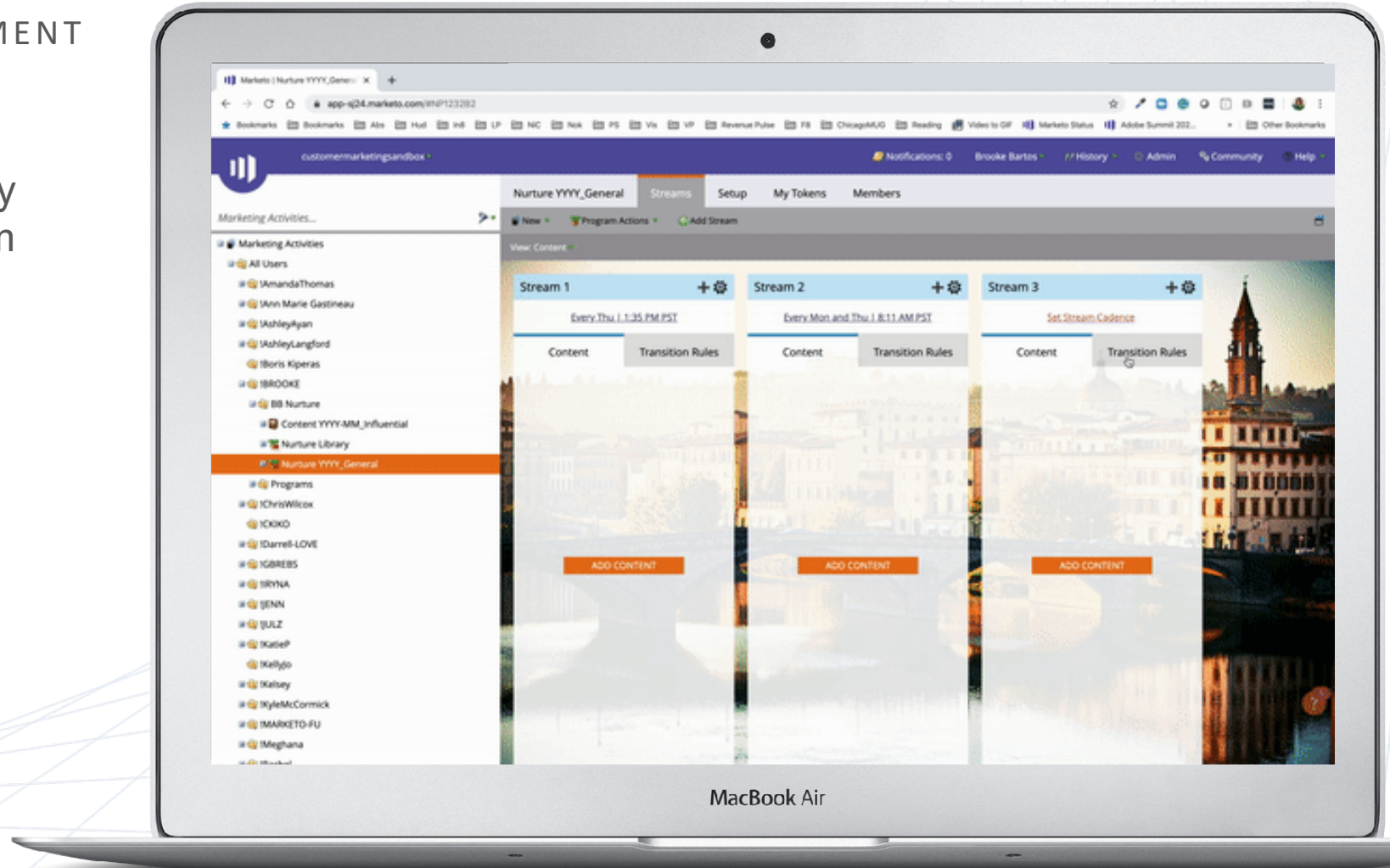
Consider how varying timing on cadence might impact someone who moves between streams in between casts.



Transition Rules

DEFINING LATER STREAM MOVEMENT

Transition rules are needed for any stream that leads will move to from another stream.



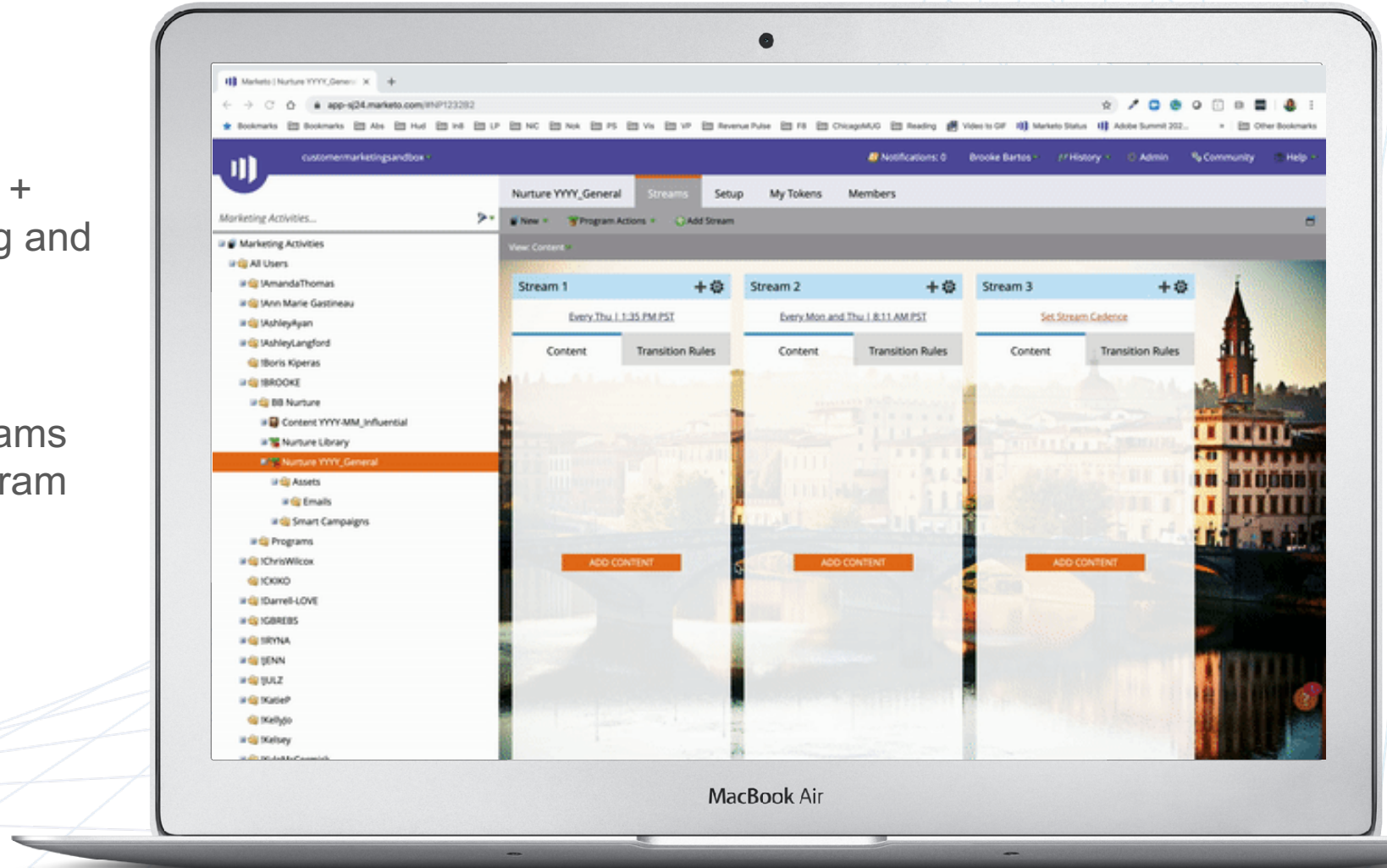
Assets

ADDING A LOCAL EMAIL

Assets can be added by using the + symbol on a stream or by dragging and dropping emails into the desired stream(s).

Content used across multiple streams will only be received once by program members.

If a member received an email in Stream 1, the same email will be skipped in Stream 2.

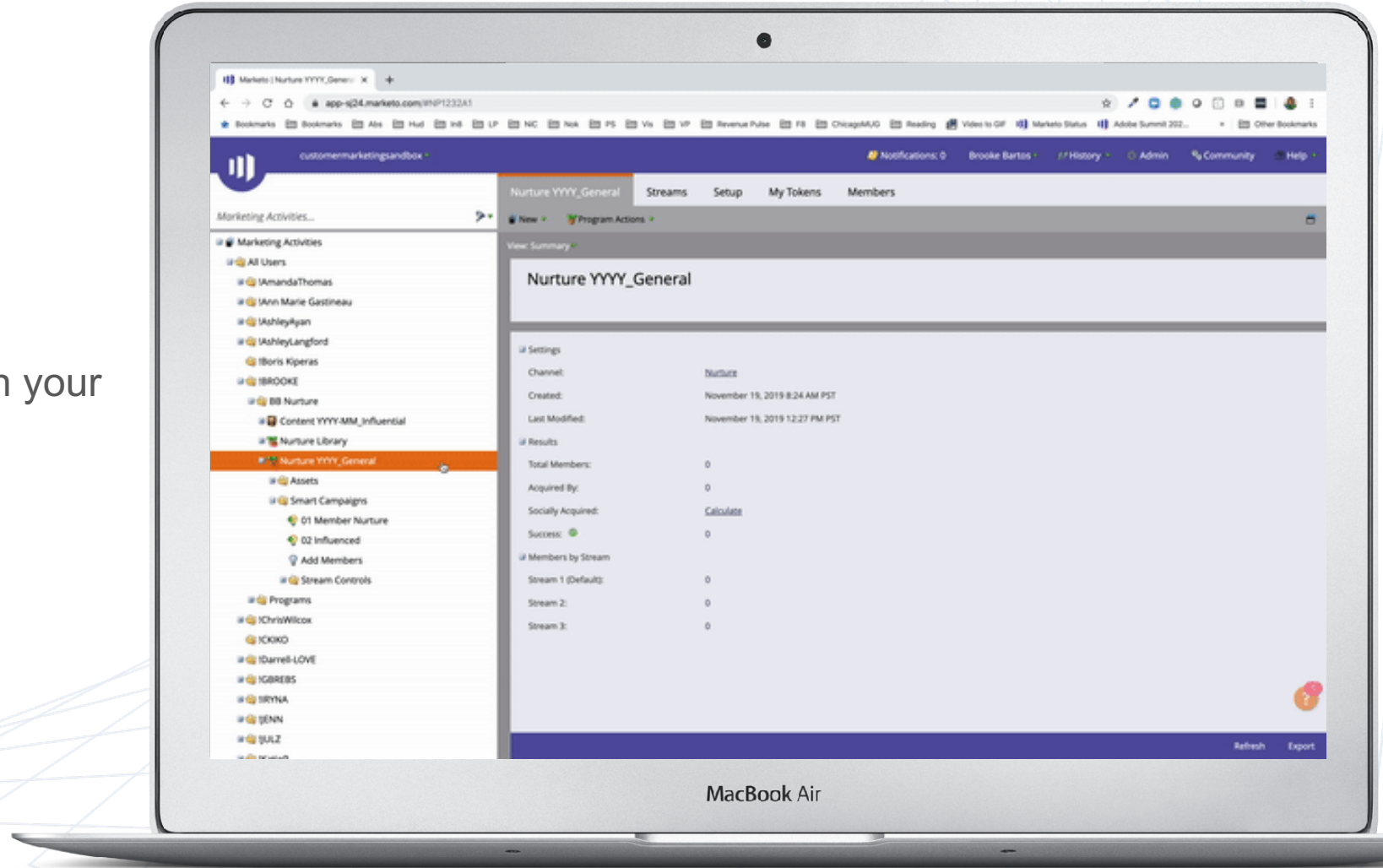


Smart Campaigns

AUTOMATION

Create Smart Campaigns to add members and change program statuses for members.

Your campaigns will vary based on your particular system statuses.

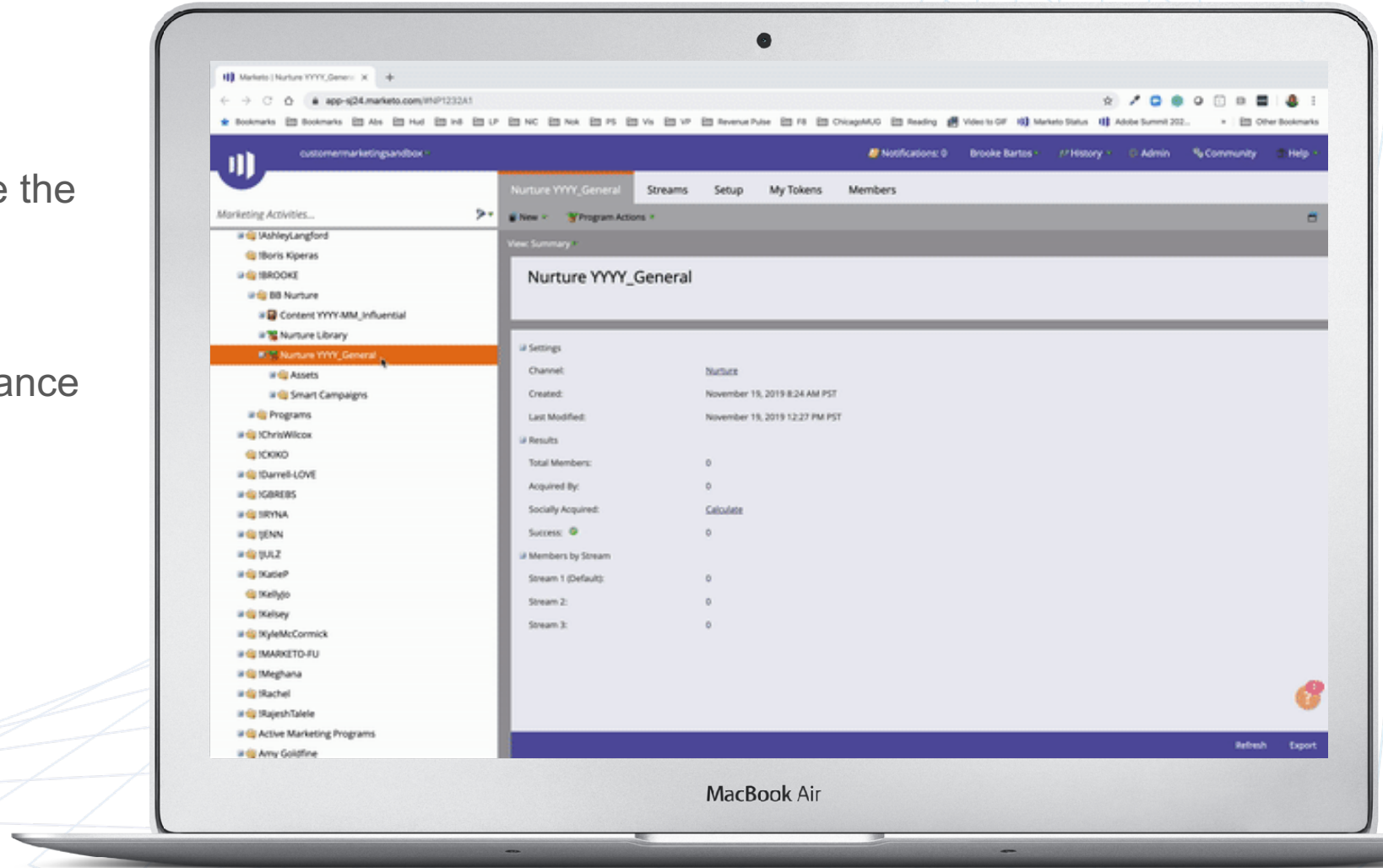


Creating Reports

PROGRAM PERFORMANCE

Create a folder for reports and use the Local Assets drop down to create reports.

- Engagement Program Performance
- Email Performance
- Email Link Performance

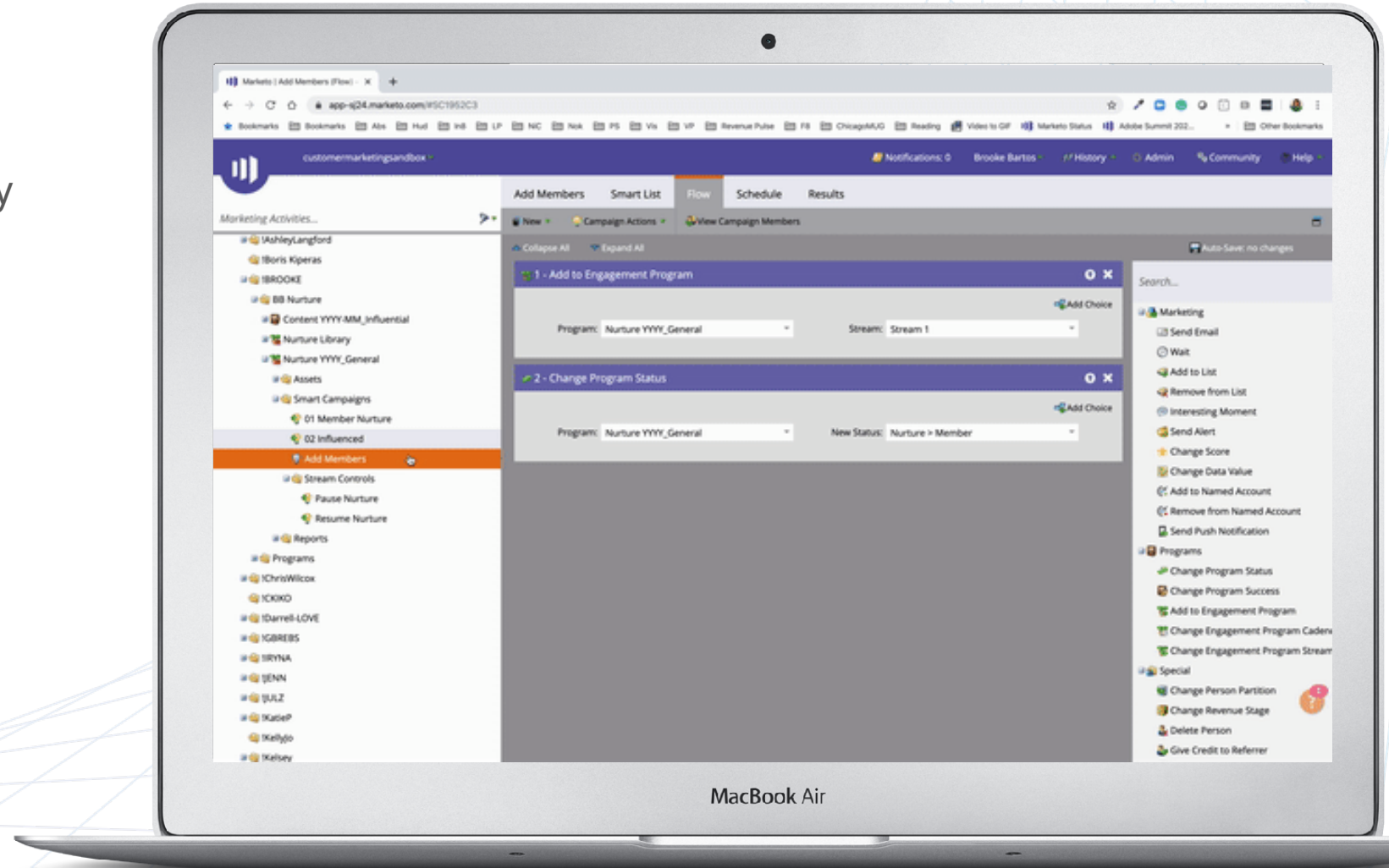


Launching Nurture

ROLL IT LIVE

Engagement programs need 4 key things to roll live:

- Audience
- Approved Content
- Live Cadence
- Active Program Status



Engagement Program Tips

TIPS FOR SUCCESS

- An instance can have up to 100 active engagement programs running at a time.
- Engagement Programs can be set to send with local time delivery.
- Nested default programs can provide additional flexibility for your email sends.
- Variable cadence nurtures can be achieved used Pause/Normal cadence adjustments .
- Best practice: add Exhausted Content leads to a static list, which can be used for future email campaigns or nurtures elsewhere in your instance.



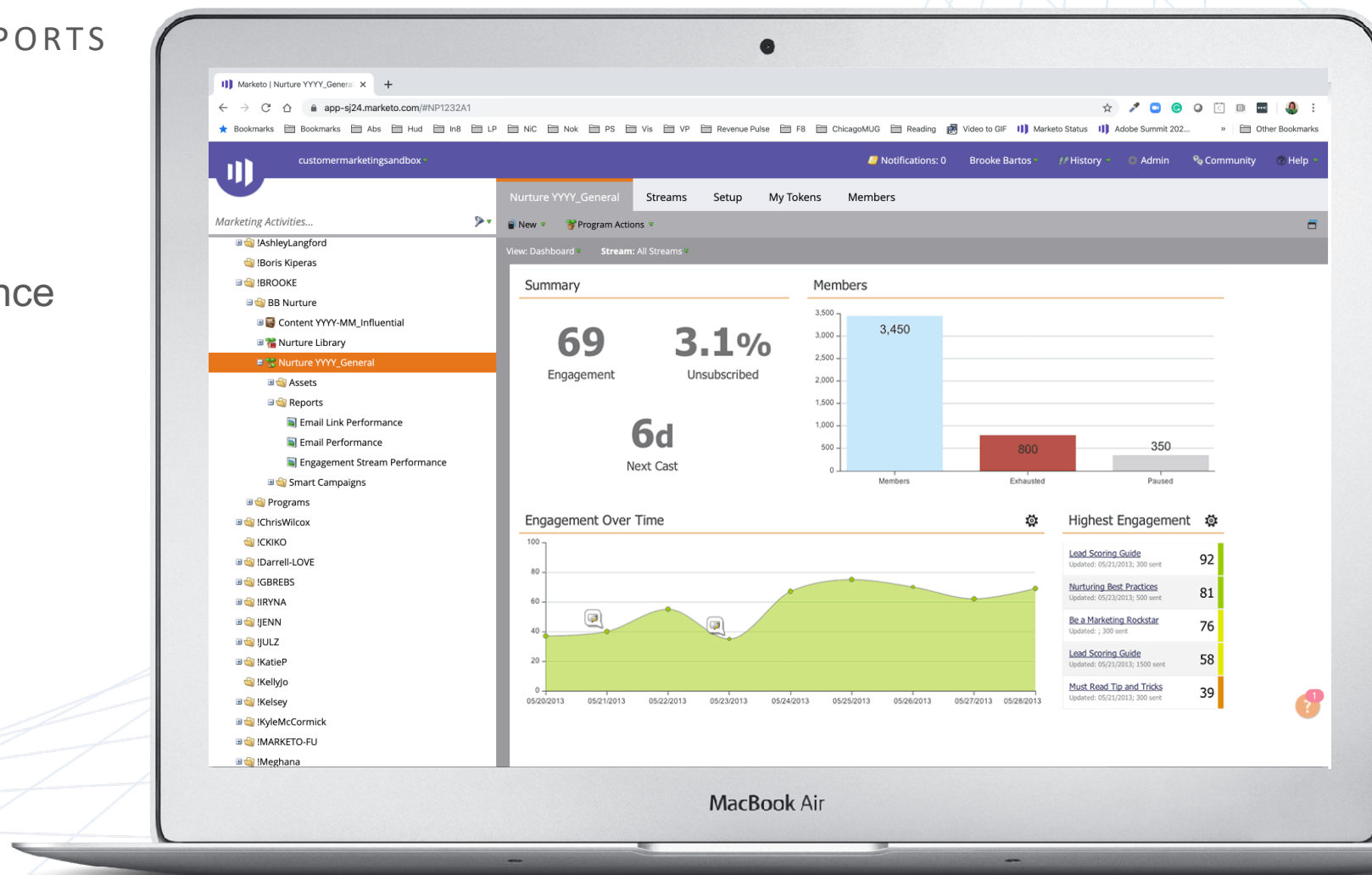
Nurture Reporting



Reporting

DASHBOARDS AND PROGRAM REPORTS

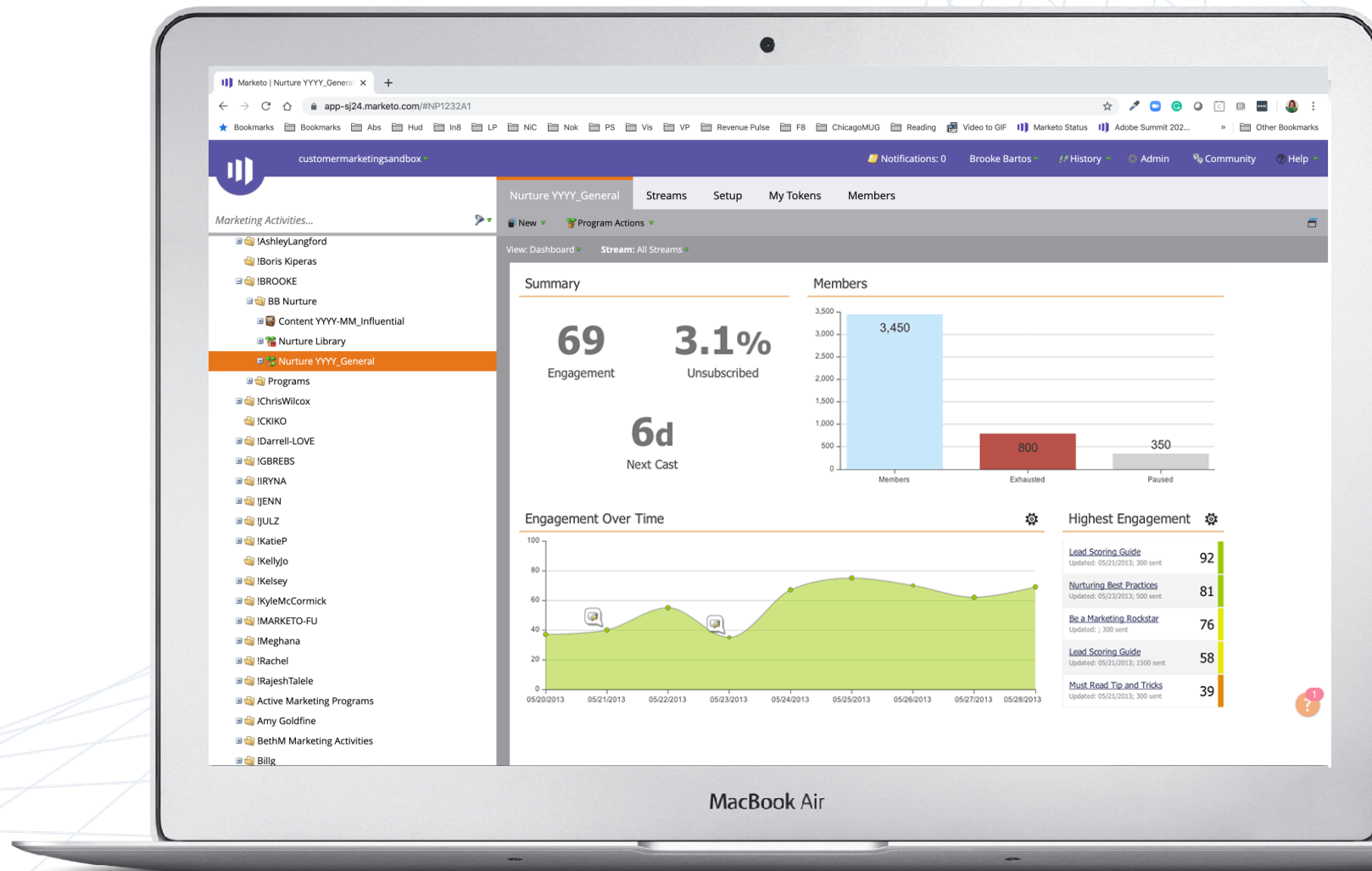
- Email Link Performance
- Email Performance
- Engagement Stream Performance



Reporting

TRANSLATING THE METRICS

- Engagement
- Unsubscribed
- Next Cast
- Members
- Exhausted
- Paused
- Engagement Over Time
- Highest Engagement



Advanced Nurture Setup

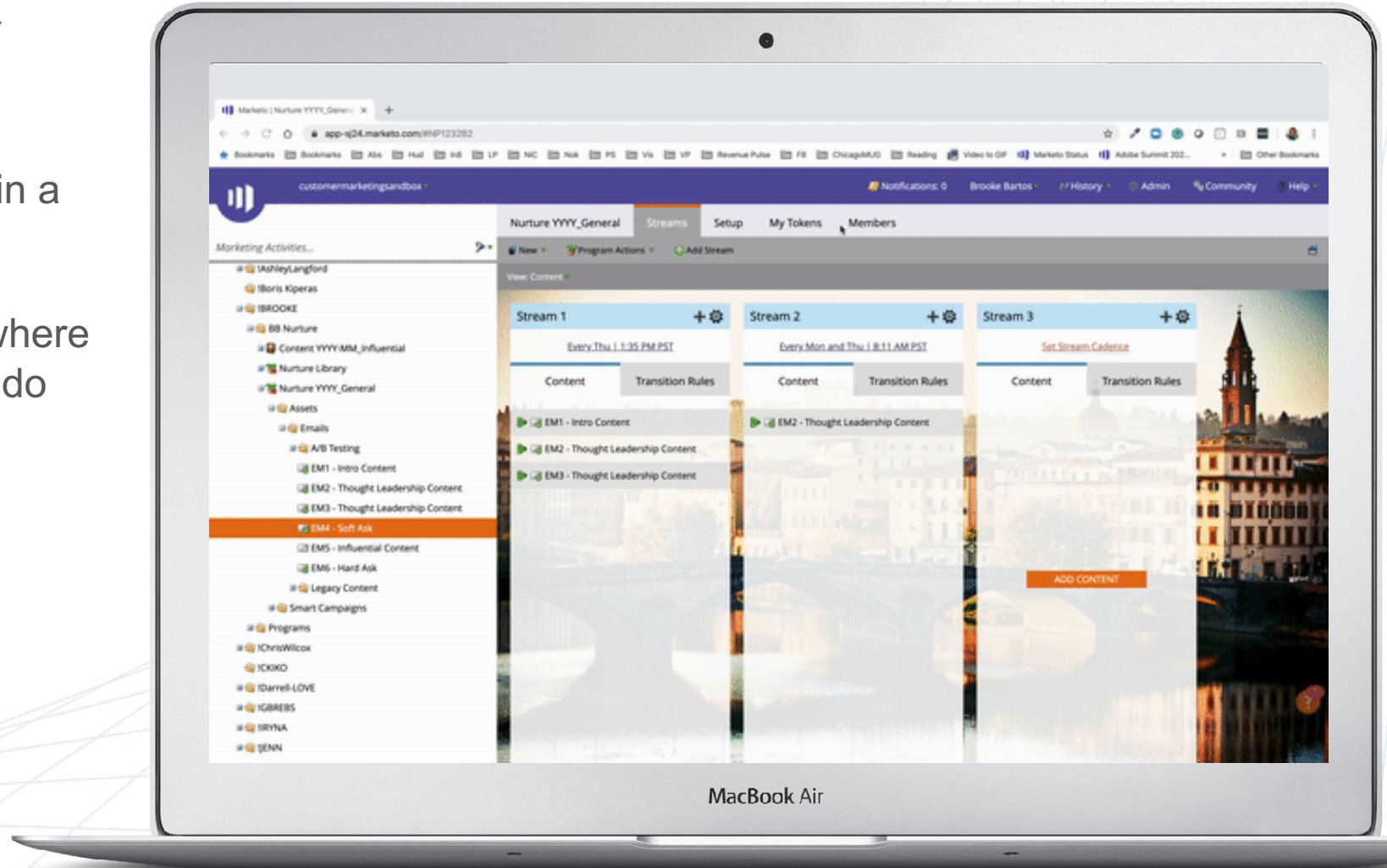


Scheduling Availability

LIMITING CONTENT AVAILABILITY

Evergreen content can be placed in a stream without limitations.

For short-term content or events where you wish to ensure that recipients do not get emails post a certain date, availability can be set at time of activation to automatically expire

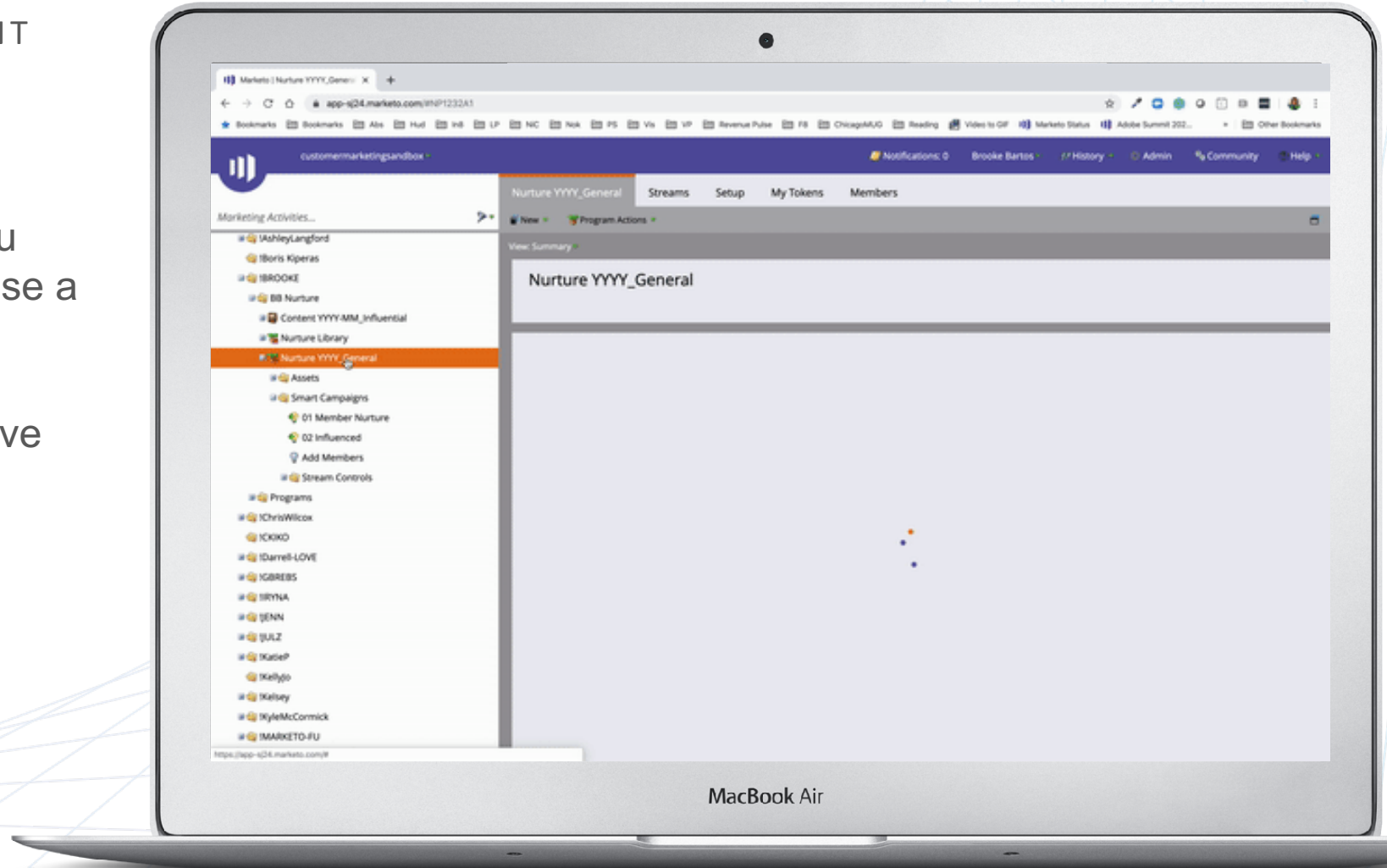


Controlling Advanced Cadences

CONTROL WHEN LEADS GET CONTENT

Using the Pause functionality in Marketo engagement programs, you can temporarily or permanently pause a lead in any stream.

While paused the lead will not receive emails from the nurture program.



Using Dynamic Content

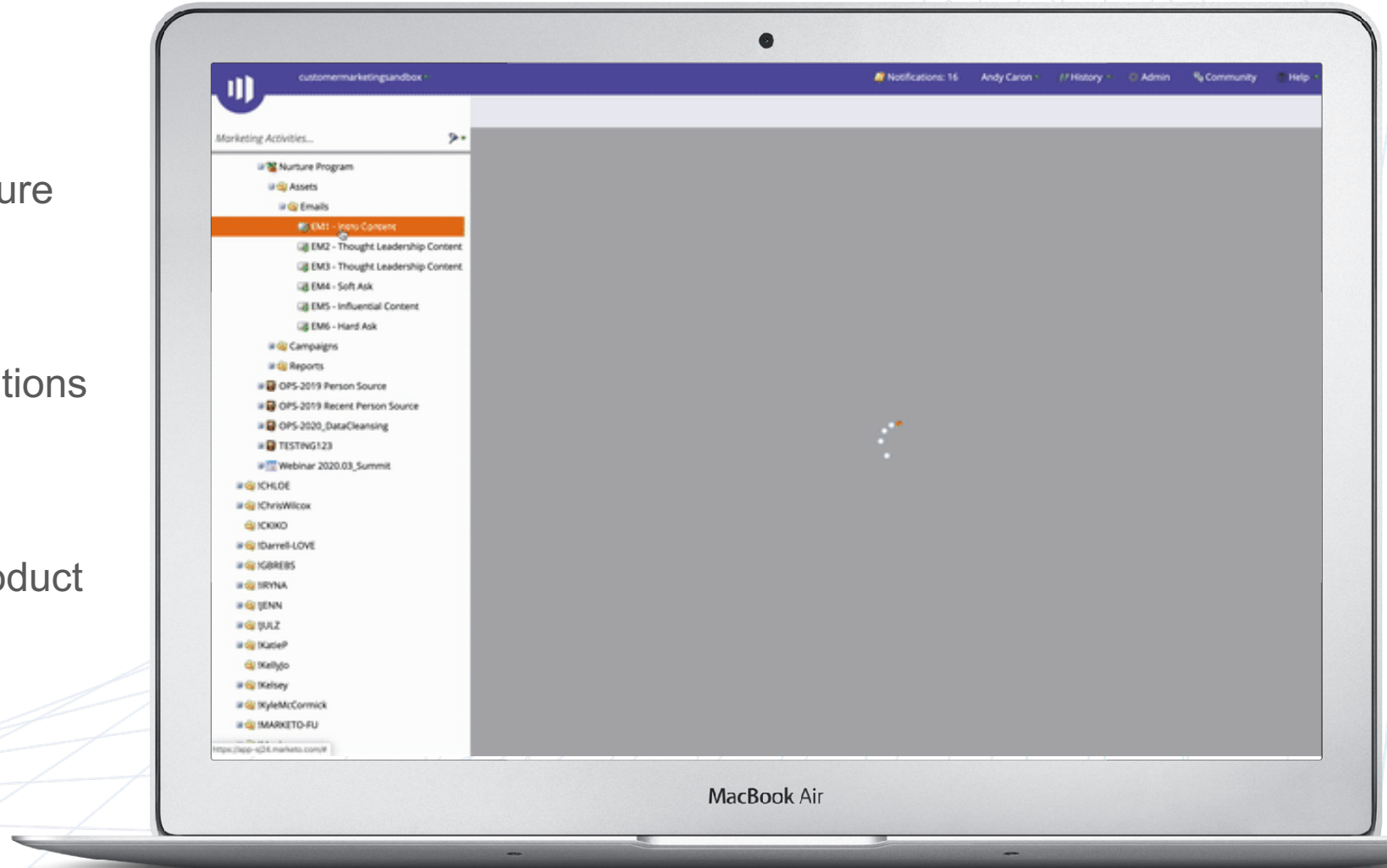
MAKE YOUR NURTURE DO MORE

Instead of creating numerous nurture programs, look for use cases for dynamic content.

This process leverages Segmentations to create differentiated messaging based on a person's segment.

Examples: Language, Region, Product Focus, etc.

*Segmentation lives under the Database in Marketo.

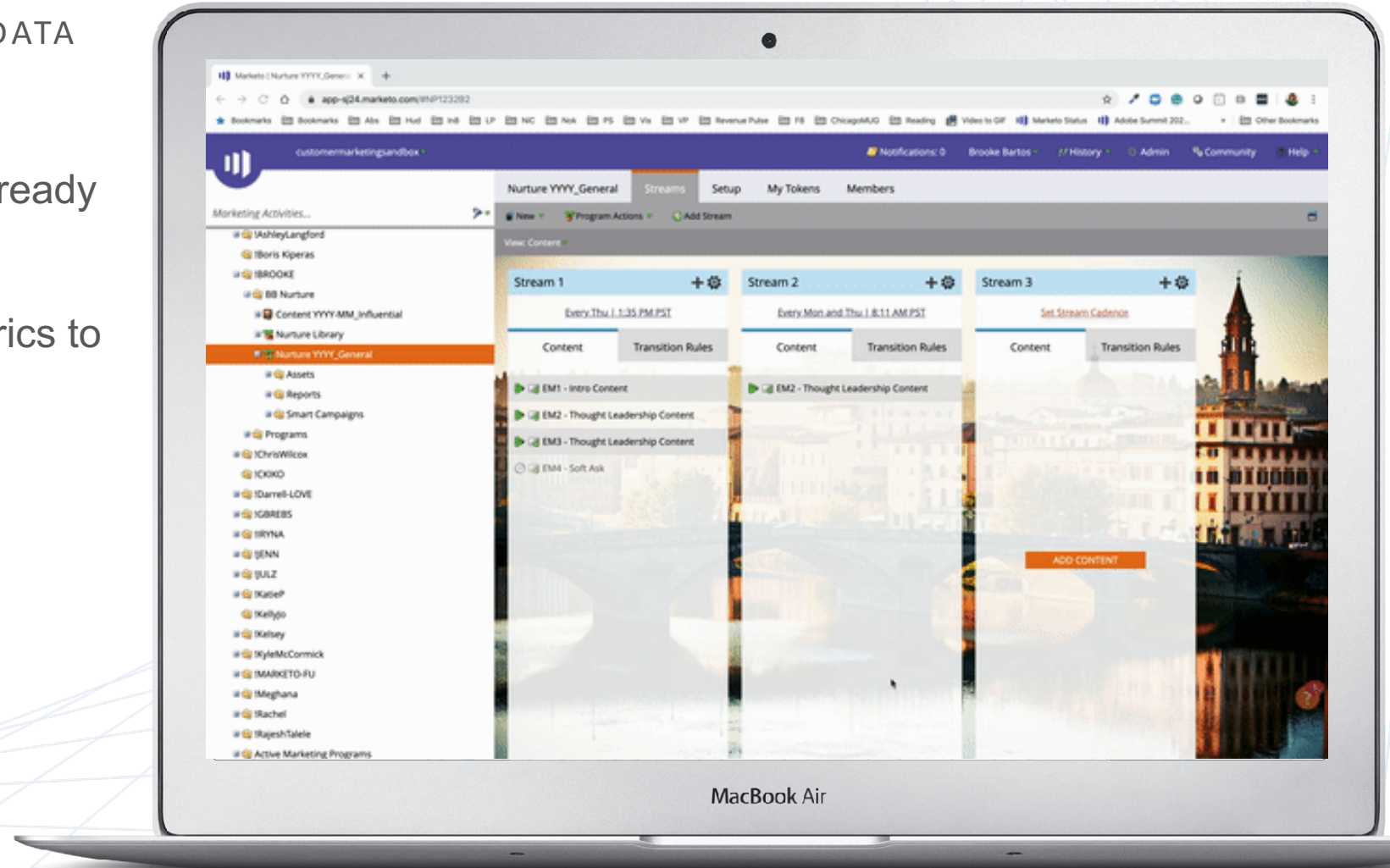


Retiring Content

REMOVE CONTENT AND RETAIN DATA

Never remove emails that have already been sent.

Archive any emails with send metrics to remove them from active status.



Using Dynamic Content

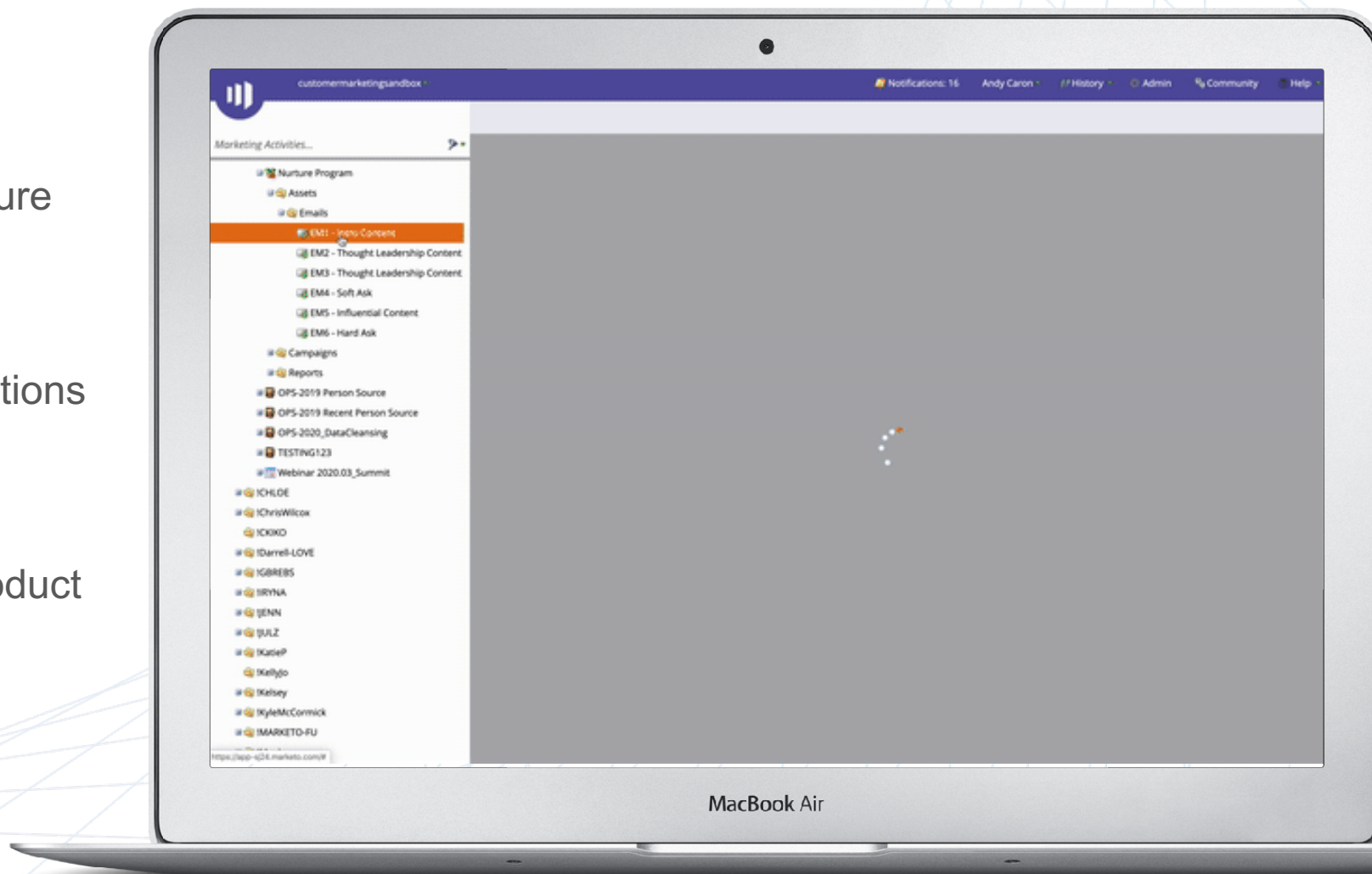
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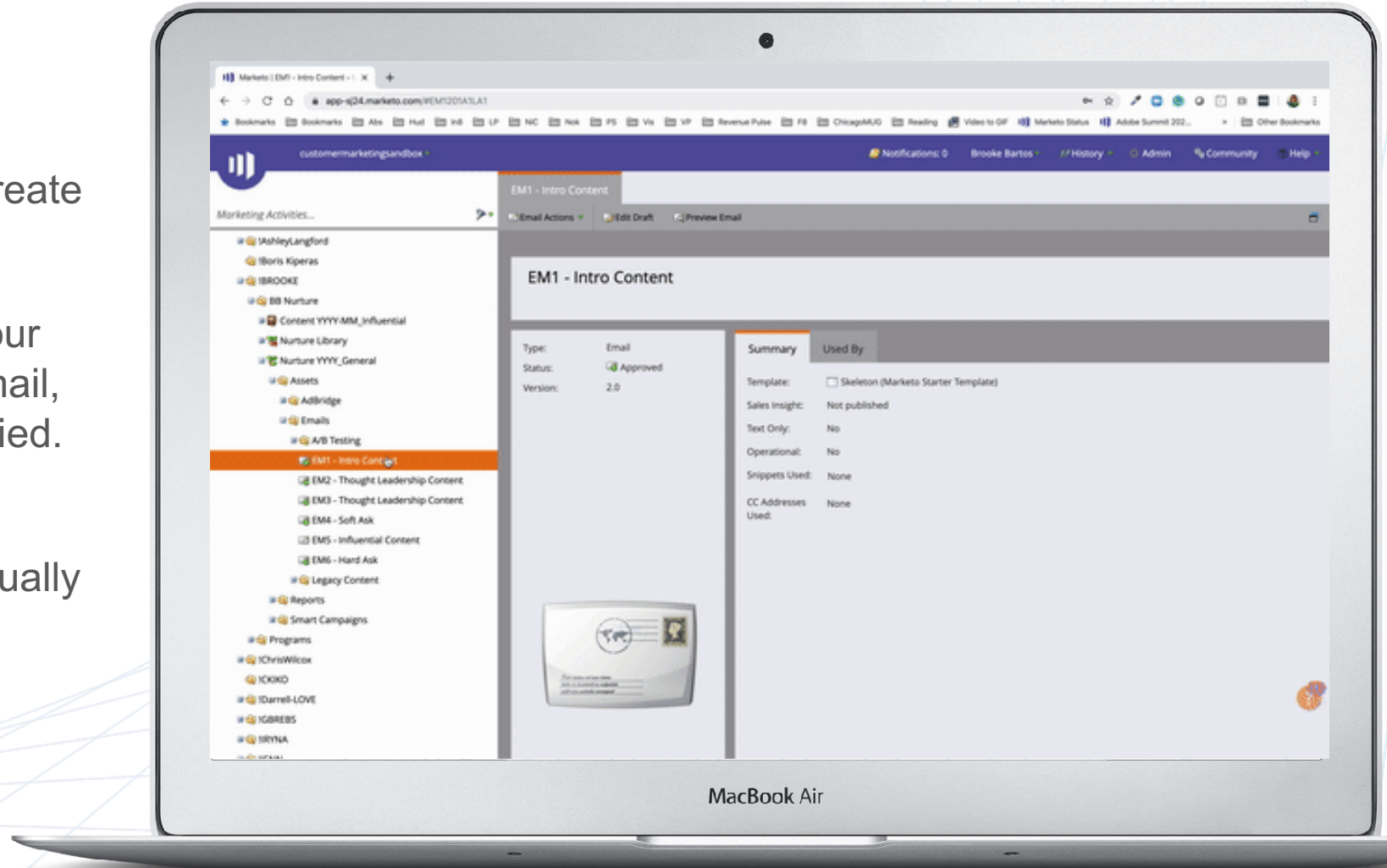
Champion/Challenger Testing

SUBJECT LINE OR WHOLE EMAIL

Use the A/B Test functionality to create a champion/challenger test.

Select the type of test, the % of your audience that will receive each email, and how the winner will be quantified.

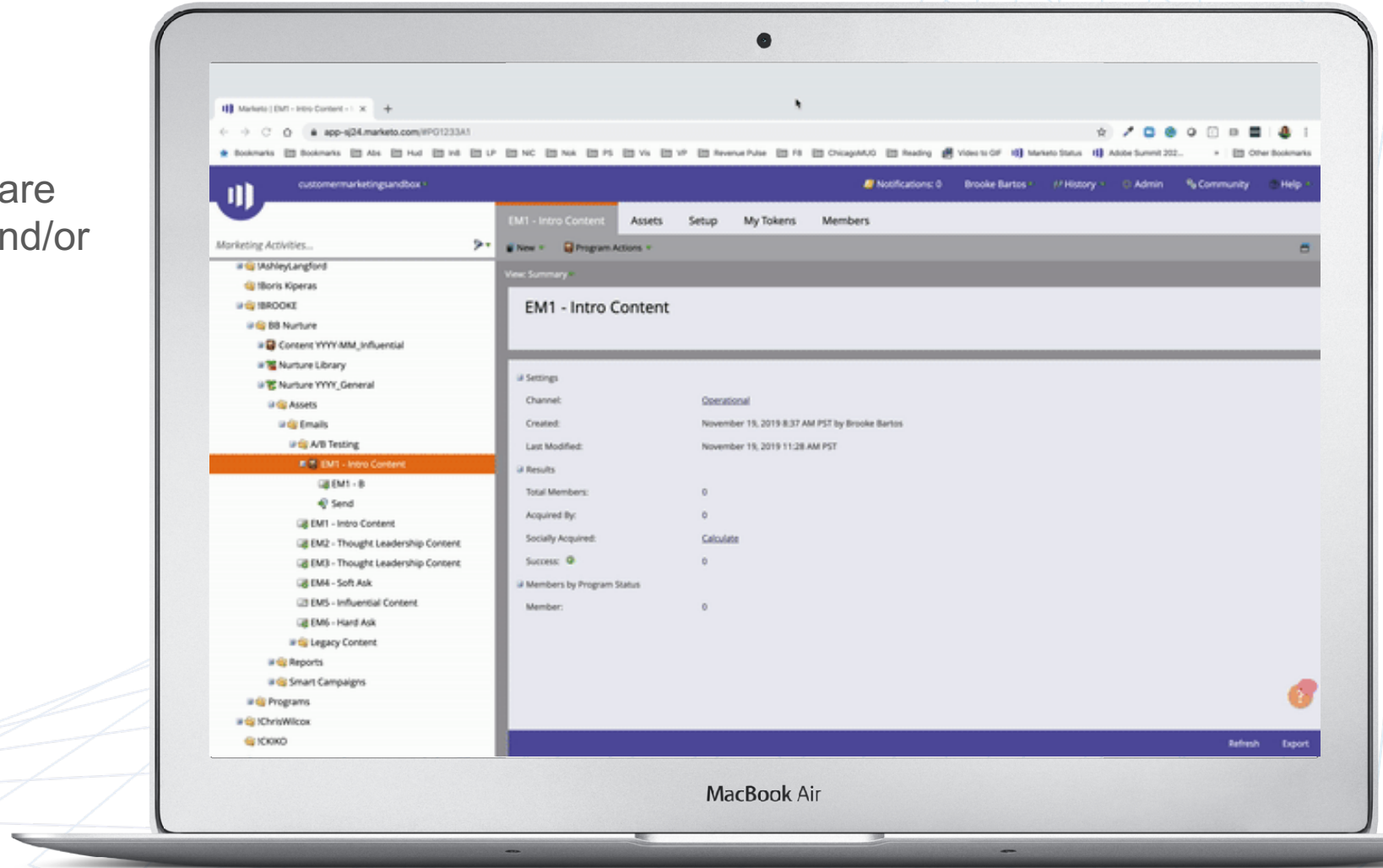
Unlike send programs or other triggered A/B tests, you must manually declare the winner.



A/B Testing

EMAILS WITH SEND RULES

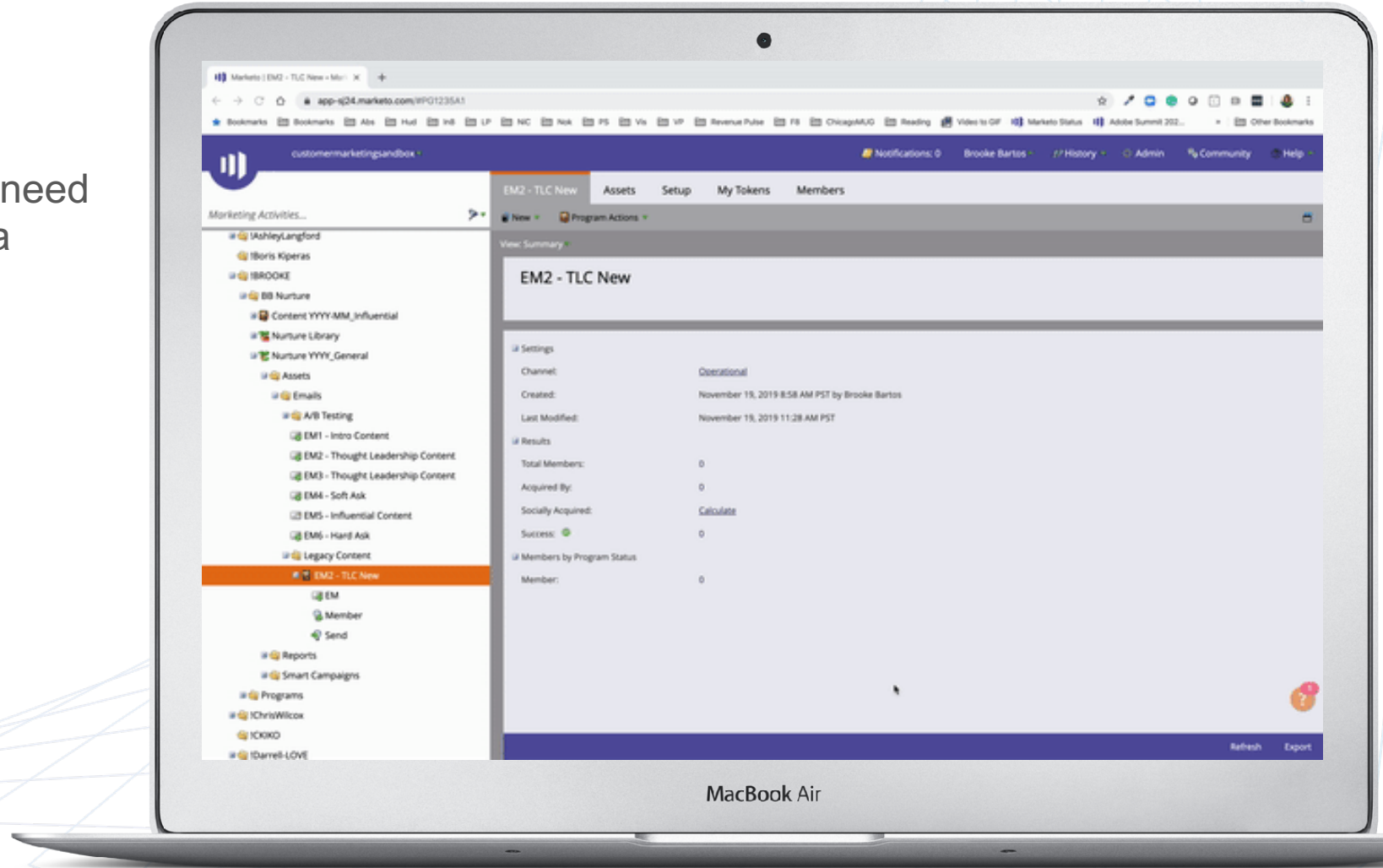
For a more robust test where you are able to compare multiple criteria and/or modify your test over time, use a nested A/B testing program.



Switching Templates or Forced Duplicates

PROVIDING GREATER CONTROL

If you have changed templates or need to force a duplicate/replacement, a nested program will provide the functionality needed to exclude previous recipients.

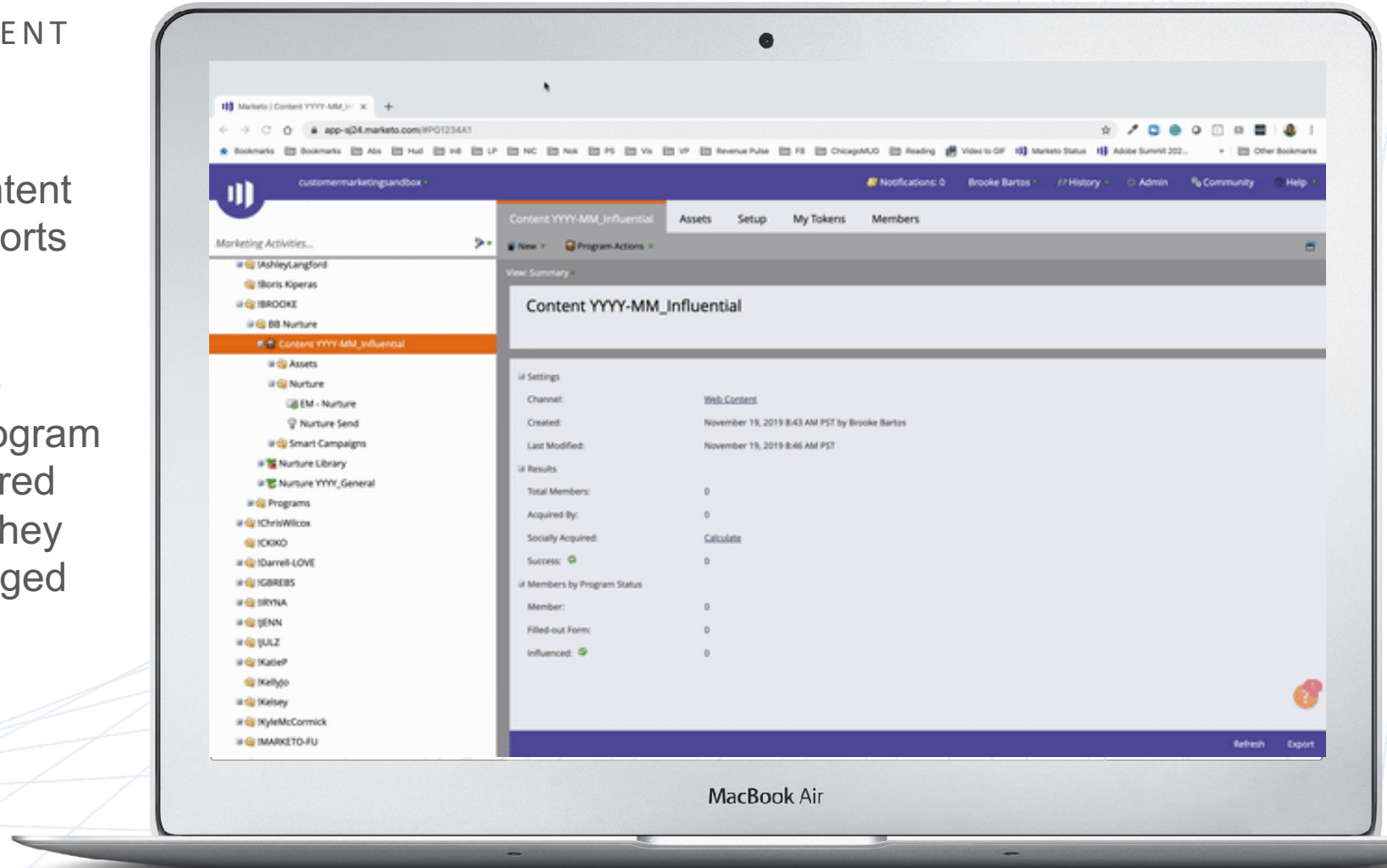


Nested Content Program

KEEPING ASSETS LOCAL TO CONTENT

Some marketers want to keep content localized to the program that supports web downloads, etc.

By placing the nurture email in the content program and using the program as a whole, you can prevent nurtured leads from receiving content that they have already downloaded or engaged with elsewhere in the system.



Engagement Program Review

WRAPPING UP

- Take time to map out the journey your leads will take before building your engagement program.
- Not every engagement program in your instance needs to follow the same structure – BUT – templatize the ones you see yourself using repeatedly!
- Programs can be as simple or complex as they need to be to get the job done.
- Document, document, document! Make sure others can translate and operate the program if needed.



Q & A



THANK YOU



