5 Proactive Pointers to Stay Ahead of Instance Issues

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Housekeeping Notes

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About the Speaker - Beth Massura

- Associate Platform Operations Consultant at Etumos
- 3x Marketo Engage Champion
- 2x certified expert

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What We'll Cover

- How to be proactive about identifying issues
- How to use Marketo Engage features to your advantage
  - System notification emails
  - Alert emails
  - Smart list and report subscriptions
- How to establish a preventative maintenance routine

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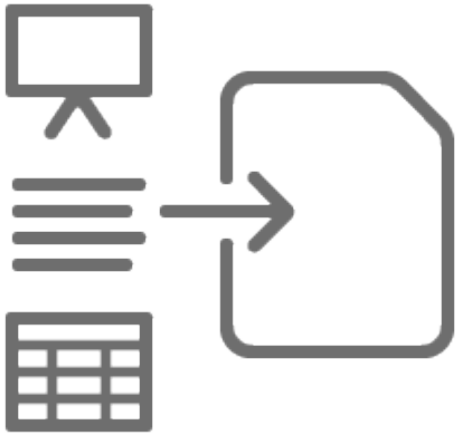
1. Anticipate and Prioritize Potential Issues

Why Being Proactive Is Important



Marketo Engage handles a lot of important data and processes

Issues are inevitable

Human error, poorly defined business processes, technical glitches

Prevent bigger issues by monitoring and acting early before they get out of control

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What Could Go Wrong?

Issue	Impacts
People created without email addresses in the CRM	• Takes up space in database without being usable • If they fill out a form, a separate record is created
Non-standard country values from manual list import	• May target people outside of serviceable areas • May not be following regional privacy policy
CRM sync fails due to a new picklist on a field	• Latest record data will not pass to CRM • Older CRM data may overwrite newer Marketo Engage data
No acquisition program due to lack of smart campaign setting it	• Unable to measure impact of marketing efforts
Person source isn't processed due to an uncategorized parameter	• Unable to measure impact of marketing efforts
People not in a lifecycle stage due to a faulty flow step	• Inaccurate picture of funnel volume • Records not routing
Scoring not firing because trigger campaign was automatically deactivated	• Records not qualifying and passing to Sales

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Where to Start - How to Prioritize

What is most critical?

MQLs not sent to Sales due to a sync error

What will be harder to resolve the more time passes?

Activity data may not be available to backfill program statuses

What will impact other processes?

Non-standard country prevents person from correct consent processing and targeted regional marketing

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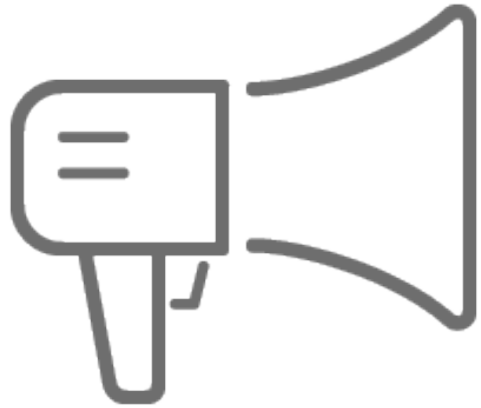
2. System Notification Emails

System Notification Emails Overview

"Notifications" in top nav shares important information about errors affecting your instance

Campaign failures, sync issues

Subscribe by email to specified notification types built into your instance



Subscription adds more protective layer

More noticeable than notification counter, don't have to log in before seeing it

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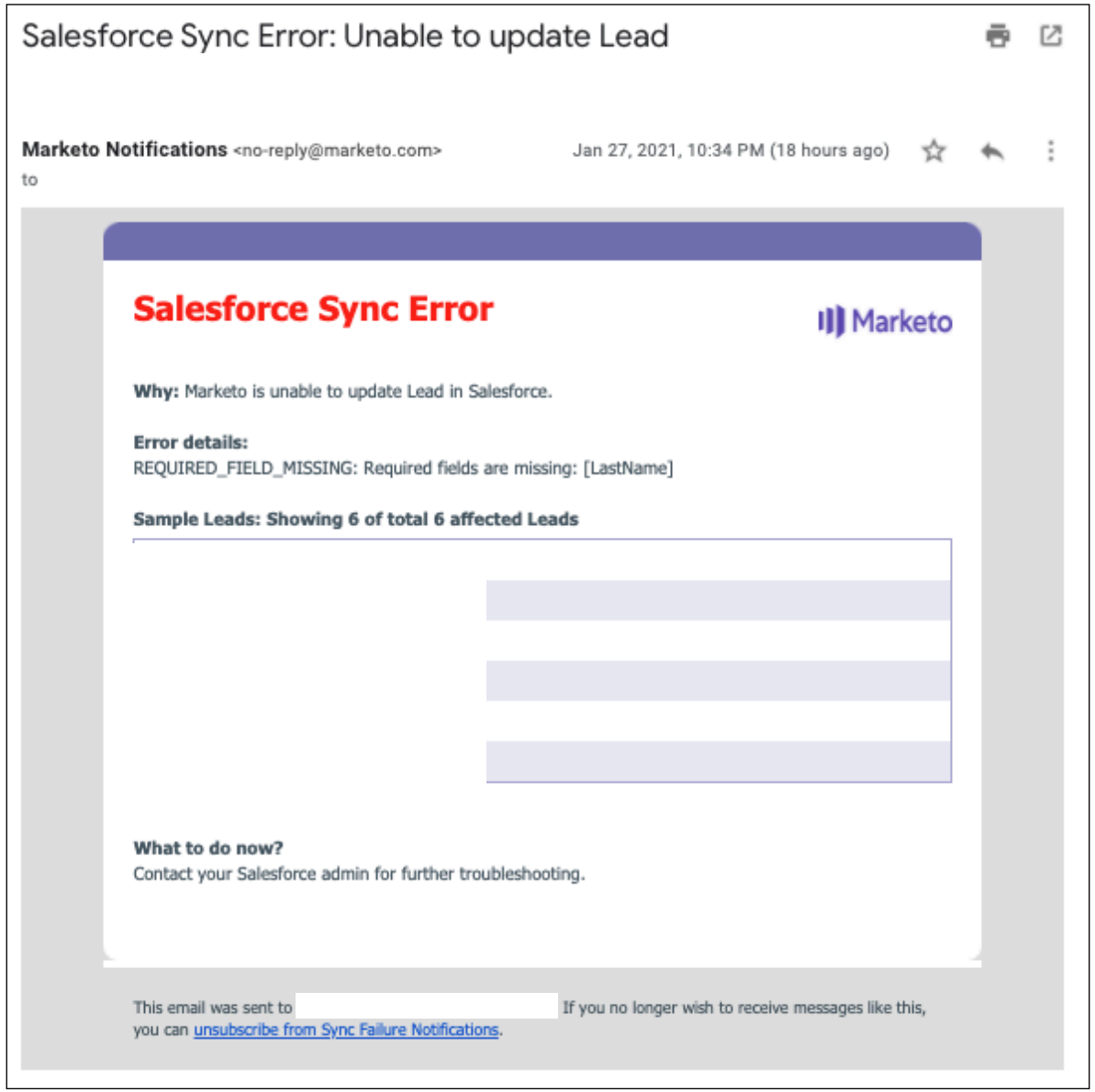
System Notification Email Example



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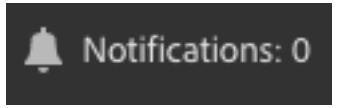
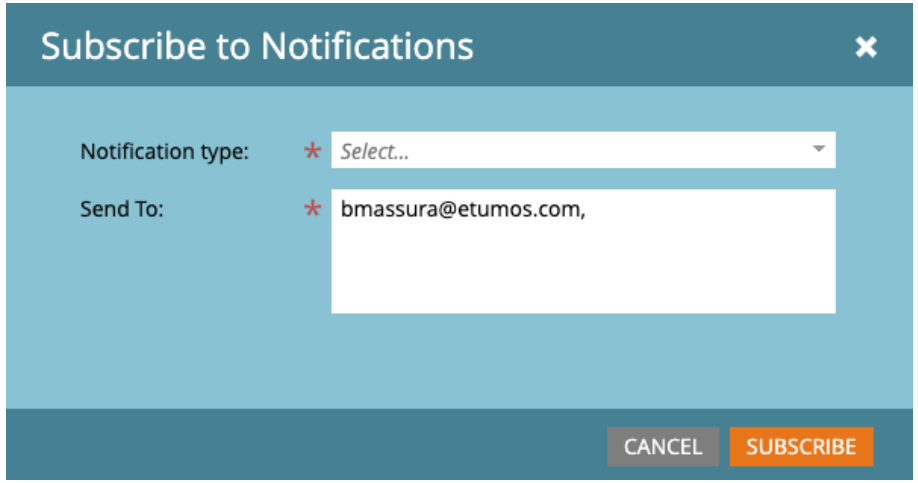
How to Set Up System Notification Emails

1. Click “Notifications” in upper right in top navigation



2. Click “Subscribe” in top gray bar

3. Fill out the dialog box
    1. Notification type
    2. Send To:
    3. If you have Workspaces in your instance, you will be prompted to select 1 or more



Note: You have to set up each notification type separately

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System Notification Types

- What options you see depends on what you have configured for your instance
- Resource: https://docs.marketo.com/display/public/DOCS/Notification+Types
- Examples (the bold purple ones are those I find the most important/frequent):
  - Campaign Failure
  - Idle Trigger Campaign Cleanup
  - Engagement
  - CRM Sync
  - Announcements
  - Web Services
  - Facebook Ads
  - Google AdWords
  - LinkedIn Matched Audiences
  - No Draft
  - DNS Configuration Error
  - Push Notification
  - SSL Certificate Expiration
  - SMIME Certificate Expiration
  - Asset Expiration Failure
  - Mass Action Failure
  - Webinar Service Expiration

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Who to Include on Notifications

- Think of what team(s) would be needed to troubleshoot and resolve
  - **Marketing Operations:** Campaign Failure, Idle Trigger Campaign Cleanup…
  - **IT/Web Dev:** Web Services, DNS Configuration Error, SSL Certificate Expiration, SMIME Certificate Expiration…
  - **Sales:** CRM Sync…
  - **Digital Marketing:** Facebook Ads, Google AdWords, LinkedIn Matched Audiences…
- Use shared email addresses when possible so notifications aren't missed when people are out of office or leave the organization

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What to Do When You Get a System Notification Email

1. Note the notification type
2. Review the error details
    - What system(s) are involved?
    - Look up technical error codes online
        - Web service error codes: https://developers.marketo.com/rest-api/error-codes/
        - SFDC errors: https://docs.marketo.com/display/public/DOCS/Salesforce+Diagnostics
3. View affected lead(s) and/or campaign(s)
    - Where did the bad data come from? (e.g. list import)
    - Do you need to run a batch campaign to resolve the issue?

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System Notification Walkthrough: Campaign Failure

- Exact campaign and flow step pinpointed
- If still don't see an issue with it, try removing and re-adding flow step
- Last edited info provides user to ask questions or educate

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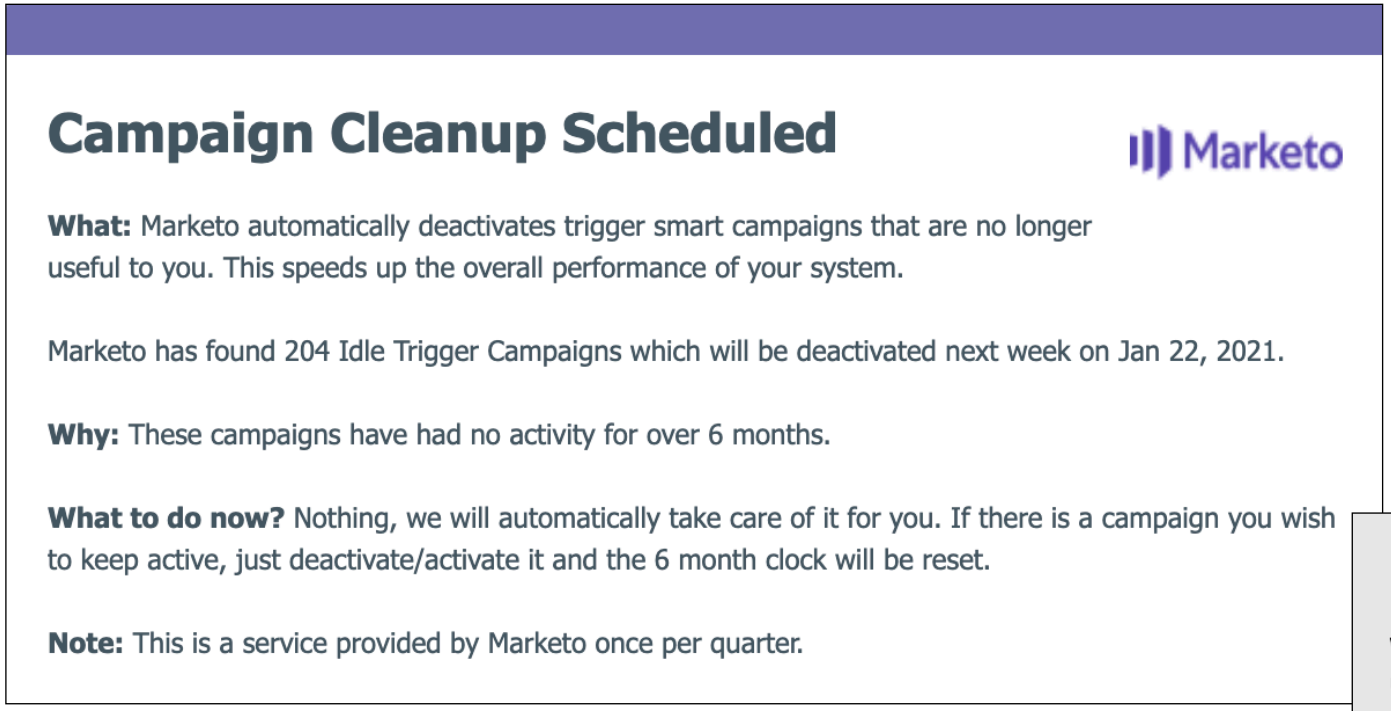
System Notification Walkthrough: Idle Trigger Campaign Cleanup



- View notification in Marketo Engage to access list of affected campaigns
- Identify evergreen/operational campaigns that should stay active -> deactivate and immediately reactivate to reset the clock
- If infrequently triggered, consider shifting to batch instead of trigger

Campaign Cleanup Scheduled

What: Marketo automatically deactivates trigger smart campaigns that are no longer useful to you. This speeds up the overall performance of your system.

These Idle Trigger Campaigns will be deactivated next week on **Jan 22, 2021**

Why: These campaigns have had no activity for over 6 months.

What to do now? Nothing, we will automatically take care of it for you. If there is a campaign you wish to keep active, just deactivate/activate it and the 6 month clock will be reset.

Note: This is a service provided by Marketo once per quarter.

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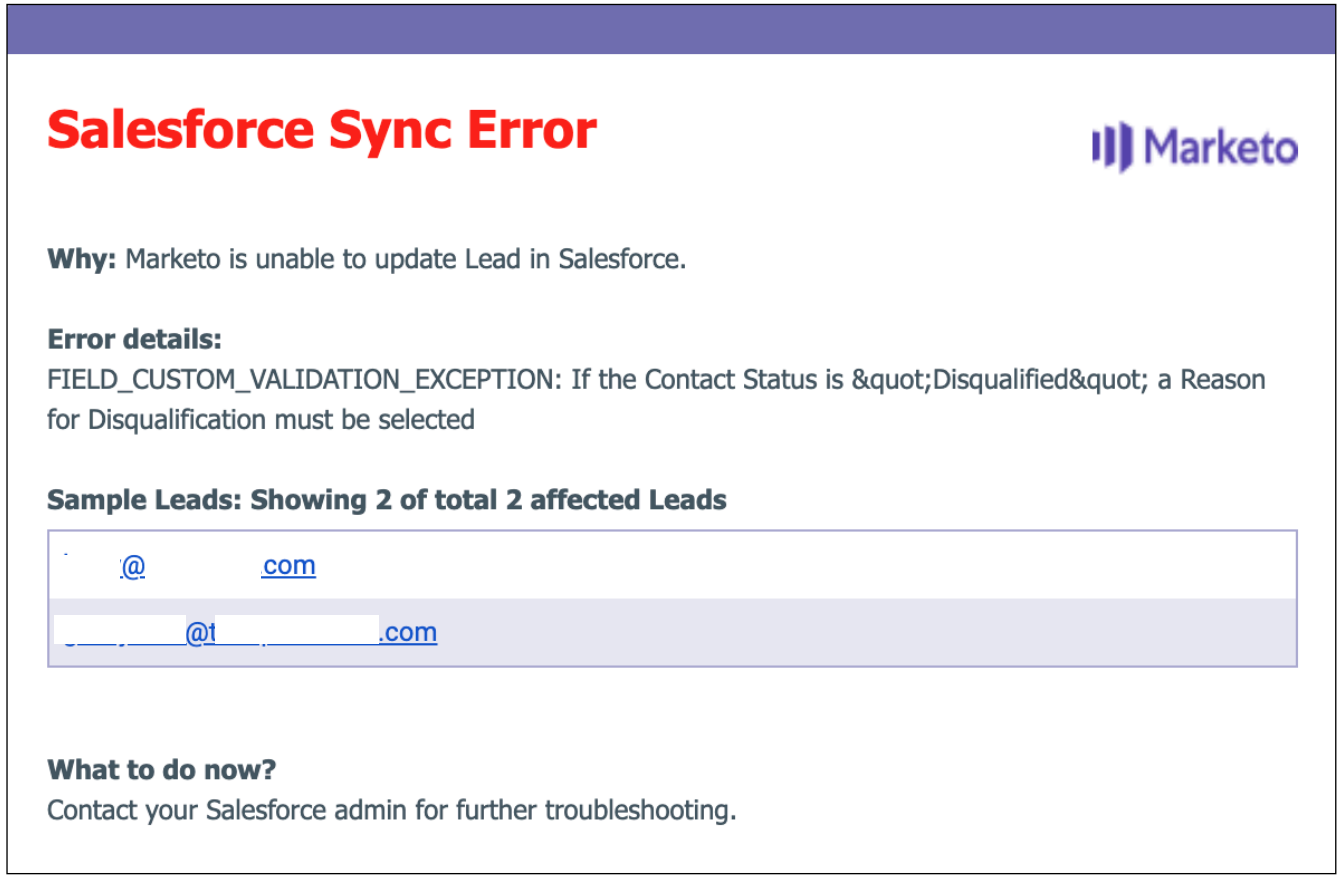
System Notification Walkthrough: CRM Sync

- Error details may be technical, but typical scenarios include:
  - Marketo Engage sync user doesn't have access to the object -> CRM admin update permissions
  - New field validation rule or picklist -> build Marketo Engage process to support requirements
  - Error with CRM processes triggered by record sync -> CRM admin fix process
- May identify overall need to be better aligned with CRM admin



Salesforce Sync Error

Marketo

Why: Marketo is unable to update Lead in Salesforce.

Error details:
FIELD_CUSTOM_VALIDATION_EXCEPTION: If the Contact Status is "Disqualified" a Reason for Disqualification must be selected

Sample Leads: Showing 2 of total 2 affected Leads

@ com

@t .com

What to do now?
Contact your Salesforce admin for further troubleshooting.

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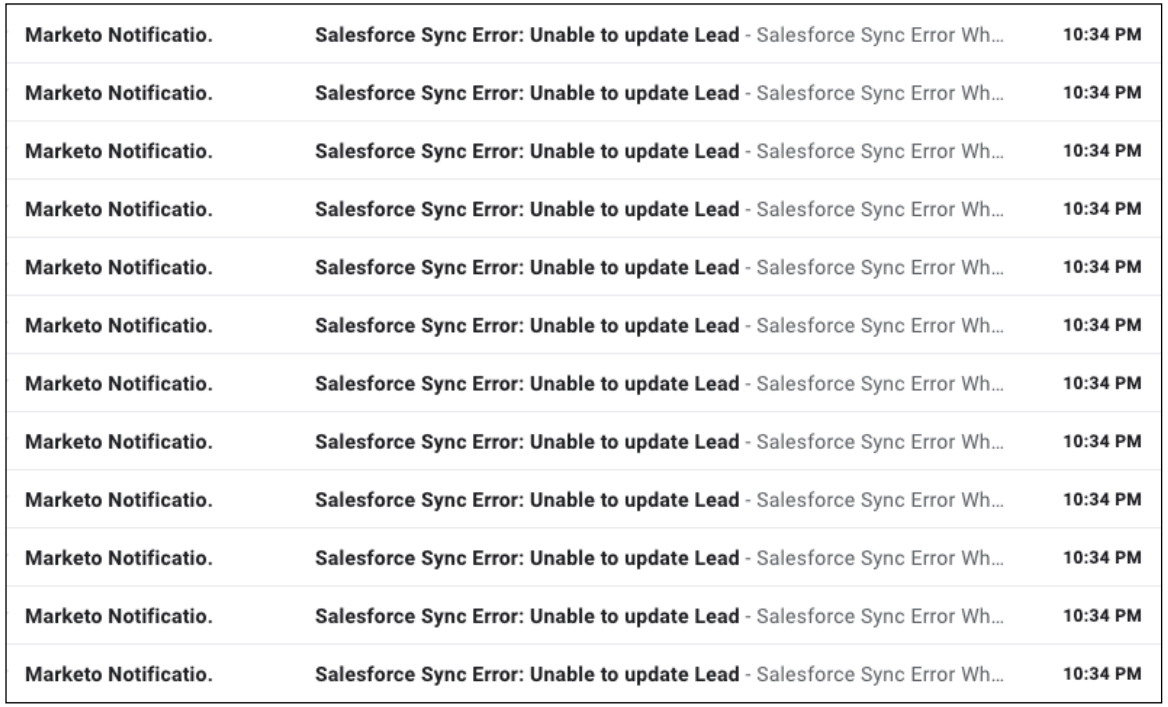
Potential Downside: Notification Overload

- One main issue, like a CRM Sync error due to a process failure could result in a large volume of (and/or recurring) notification emails
- You may want to temporarily unsubscribe from the notification type until the issue is resolved to avoid a crowded inbox
  - Click the unsubscribe link in one of the emails
  - You can set up the subscription again after the issue is resolved
  - You'll still be able to see all notifications within Marketo Engage



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System Notification Emails Summary

Ease of setup	✓	Very easy
Flexibility	⚠	Low - specific issues only; no customization
Timeliness	✓	Within a day
Ease of Interpretation	⚠	Medium - some may be technical and require looking up an error code
Scalability	∅	n/a
Best for	🔔	Rare, specific issues that fit the options available

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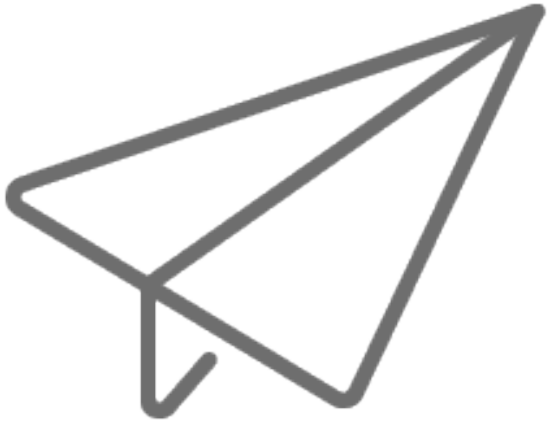
3. Alert Emails

Alert Emails Overview



Uses Send Alert flow step

Triggered when person does/doesn't go through operational process or have certain value

Send alert to person who can troubleshoot & resolve instead of sales owner

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Alert Email Example

ERROR: OP - Permissions Processing Inbox ×

Marketo Engage Alerts
to me

Hello,

The following record could not be processed by OP - Permissions Processing. Please review and resolve.

Marketo Alert Information
Lead: Mark Eto (SFDC Detail)
Campaign: OP - Permissions Processing.ZZ - ERROR
Time: Jan 10, 2021 9:30 am PST

This record could not be sorted due to the Country value. Make sure the Country value is standardized and accounted for in the flow step choices.

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How to Set Up Alert Emails: The Right Kind of Situation

- Where you wouldn't anticipate regular issues, and it would affect individuals rather than general groups of people
- Exhaustive flow step choices
    - Example: Permissions processing (aka privacy compliance) - All countries should be accounted for. If a country is missing from the flow step choices, you'll want to know so you can add it
- Webhook or Launchpoint integration errors
- Egregious data values
    - Example: If you already have a standardization program in place, you may want to know what isn't successfully standardized

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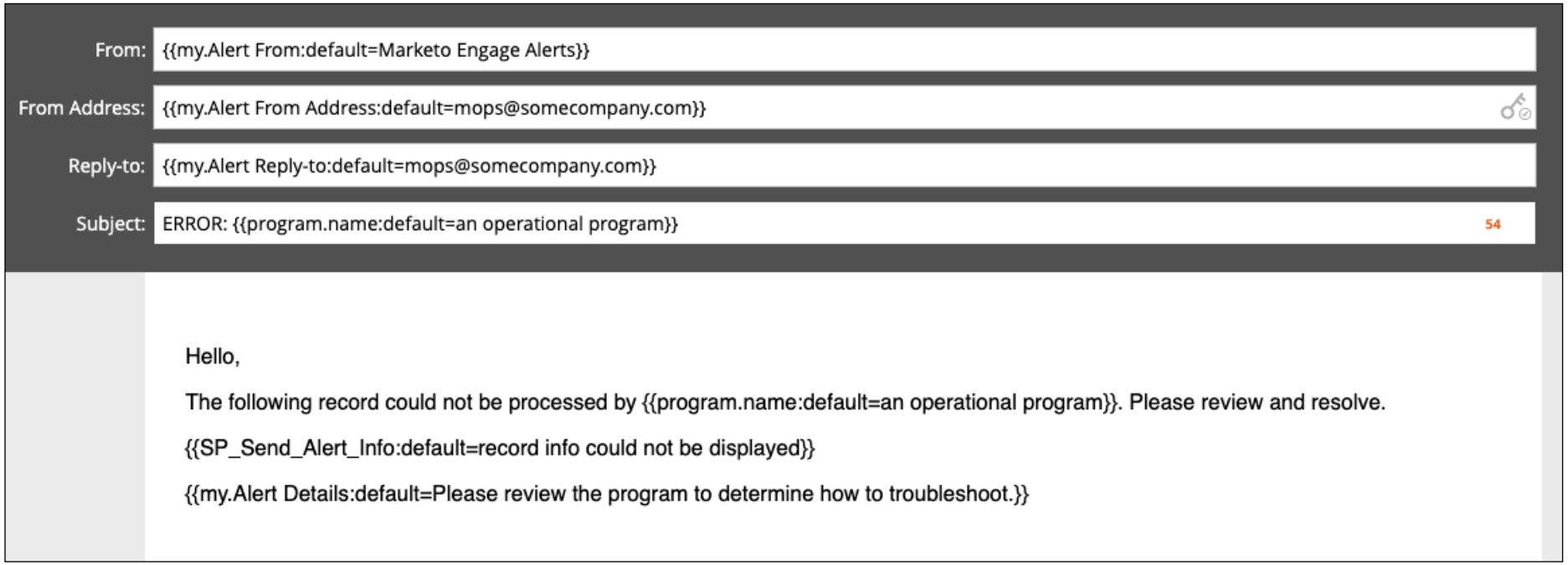
How to Set Up Alert Emails: The Email Asset

- Create an email asset using a basic email template
- Add in the subject and body any information useful to give context as to what the issue is. Tip: use tokens!



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How to Set Up Alert Emails: The Email Asset, cont'd.

- **System program tokens** to automatically populate the specific program information
  - {{program.name}} for the program name in the subject and/or body
- **Custom program tokens** (aka "my" tokens)
  - Description and tips for troubleshooting
- **{{SP_Send_Alert_Info}}**, a special alert-only token, to populate important info in the body:
  - First & last name linked to the Marketo Engage record of the affected person
  - Link to the person's SFDC record
  - Campaign name that sent the alert
  - Time alert was sent
  - Resource: https://docs.marketo.com/pages/releaseview.action?pageId=2952678

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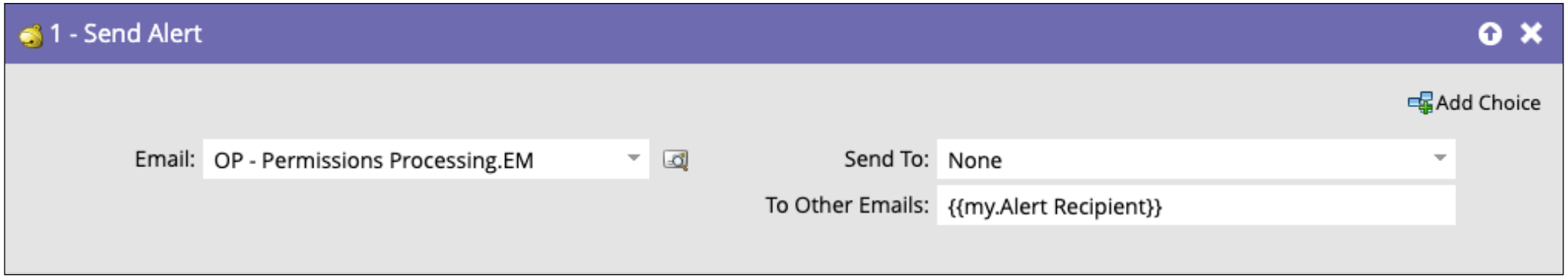
How to Set Up Alert Emails: The Error Campaign

- Create a triggered smart campaign with a send alert flow step using this email asset
  - Send To: Select "None"
  - To Other Emails: set to the people who should be alerted
    - Same recommendations apply
    - Tip: use a custom program token - or inherited global token - for the recipient email address
  - Resource: https://docs.marketo.com/display/public/DOCS/Send+Alert



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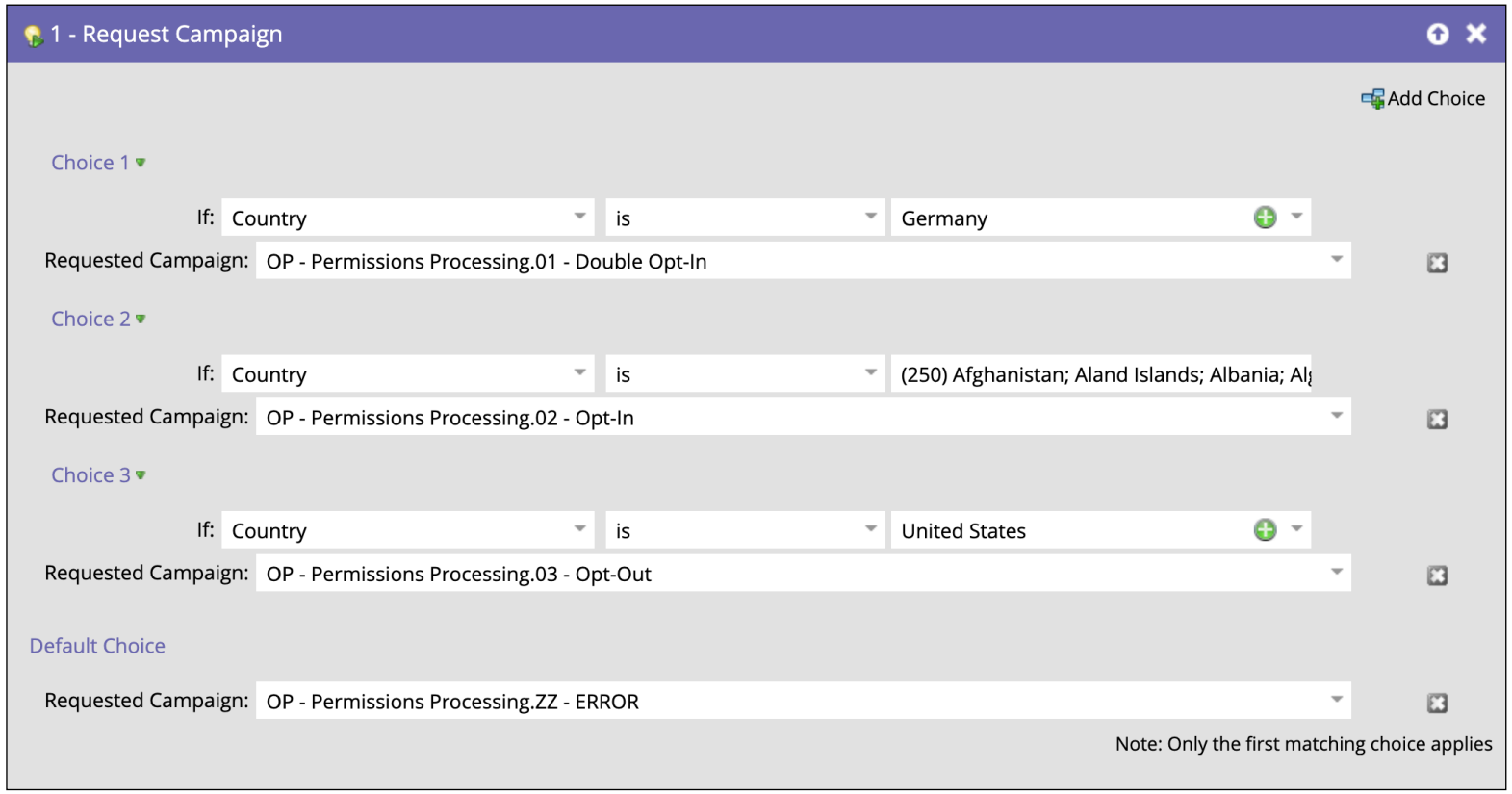
How to Set Up Alert Emails: Requesting The Error Campaign

- Add the smart campaign as a default choice on a process where everyone should qualify for one of the other choices (i.e. make it exhaustive)
- Could also trigger the error campaign directly with a data value change for egregious values, or based on a webhook response for a webhook failure



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What to Do When You Get an Alert Email

1. Review the contextual information provided in the subject and body of the email
2. Click through to view the person's record in Marketo Engage and/or the CRM
3. Determine whether the processing program needs to be updated
4. Update the person's record manually and/or rerun the process as needed

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Alert Emails Summary

Ease of setup	More involved - may require reconfiguration of operational program
Flexibility	High - control over criteria and content
Timeliness	Immediate
Ease of Interpretation	High - with appropriate content to guide the recipient
Scalability	High - with program templates and/or centralized error program
Best for	Catching rare, unexpected exceptions/values

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4. Smart List/Report Subscriptions

Smart List/Report Subscription Overview

Sends email on specified cadence with link to smart list or report

Smart list subscription includes link to download list of people

Report subscription options for attachment and/or the first several rows of data in email body

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Smart List Subscription Example

Duplicates by Email to Review

DOWNLOAD REPORT

Smart List: Duplicates by Email to Review

Smart List definition:
Smart List: Duplicates by Email to Review
(ID 56575)
rule logic: ALL filters
#1: Member of Smart List is 'Duplicates by Email'
Smart List: Duplicates by Email
(ID 56574)
rule logic: ALL filters
#1: Duplicate Fields is 'Email Address'

Note: Reports are limited to one-hundred thousand records.

If you no longer wish to receive this message, you can unsubscribe from this report.

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Report Subscription Example

People by Lifecycle Status

Report: People by Lifecycle Status

Generated: Feb 28, 2021 10:50 PM PST

Time Frame: All Time

Smart List: 1 rule

4 (all)

Lifecycle Status ⇓	Total People
9 - Disqualified	177
7 - MRL	1
2 - MQL	1
1 - MAL	6
Total (4):	**185**

If you no longer wish to receive this message, you can unsubscribe from this report.

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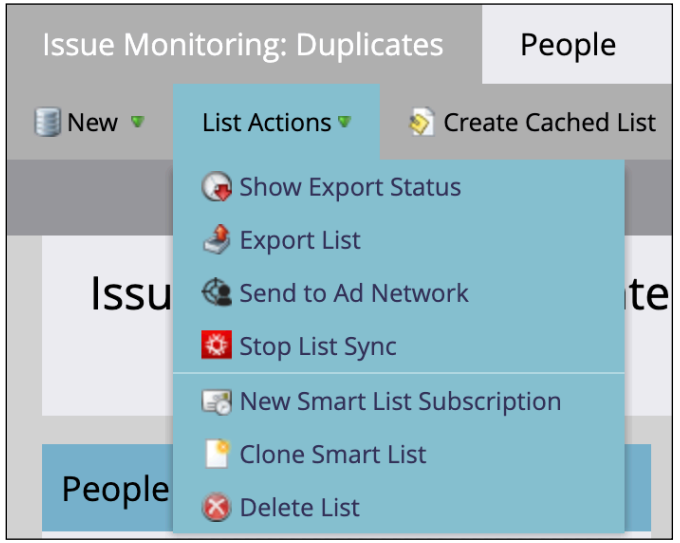
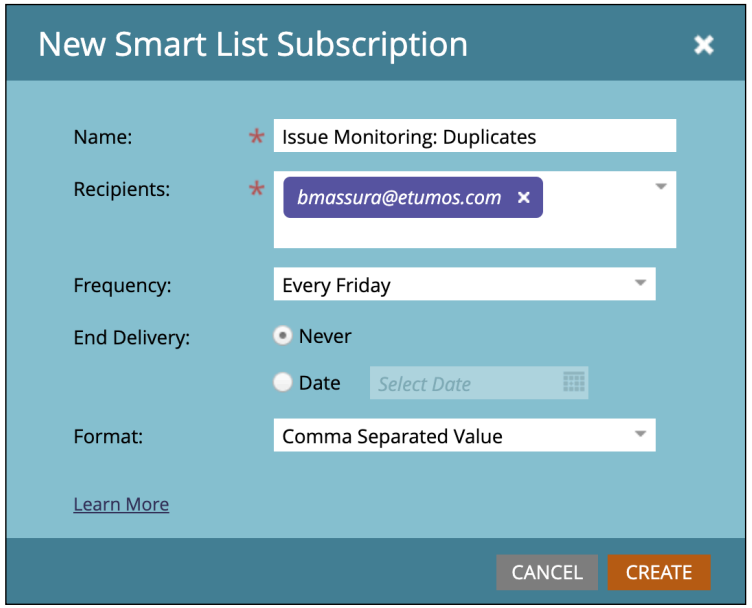
How to Set Up a Smart List Subscription

- Create a smart list to capture problematic records, such as duplicates, missing acquisition program, etc.
  - Be clear in the smart list name and include a description to provide context
  - Not available on system smart lists like “Possible Duplicates” (You’ll have to recreate)
  - Limit of 100 subscriptions across instance; be mindful of what other users may need
- From the smart list, go to List Actions > New Smart List Subscription in the gray navigation bar
- Give it a name to reflect what it captures





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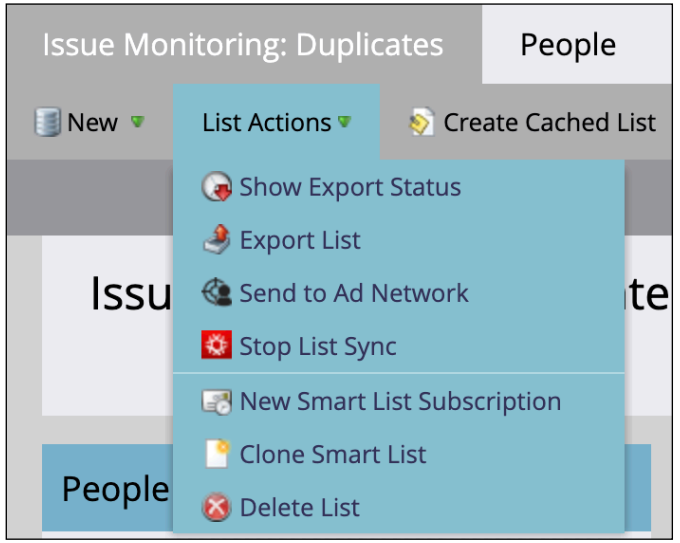
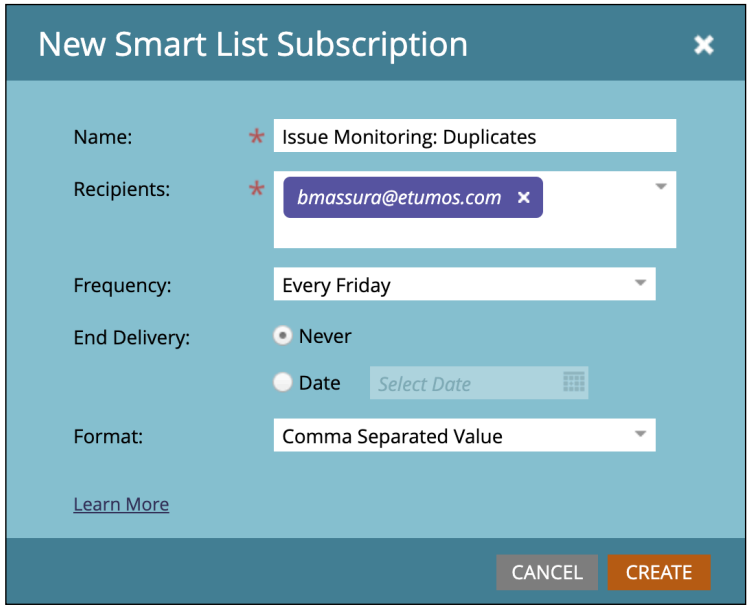
How to Set Up a Smart List Subscription, cont'd.

- Enter one or more email addresses to receive the email
  - Same recommendations apply
  - Admin setting for whether or not a person has to log in to download
- Select a frequency: Daily, Every [Day of Week] or First of the Month, and end date, if applicable
  - Note: will get email even if there are no people in the smart list
- Select format of downloaded results (Comma Separated Value is most common)
  - Consider data privacy/security if sharing with people who don't have a Marketo Engage login
- Resource: https://docs.marketo.com/display/public/DOCS/Subscribe+to+a+Smart+List





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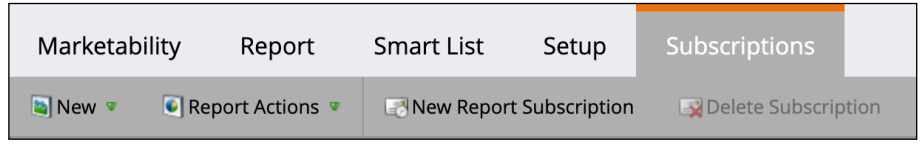
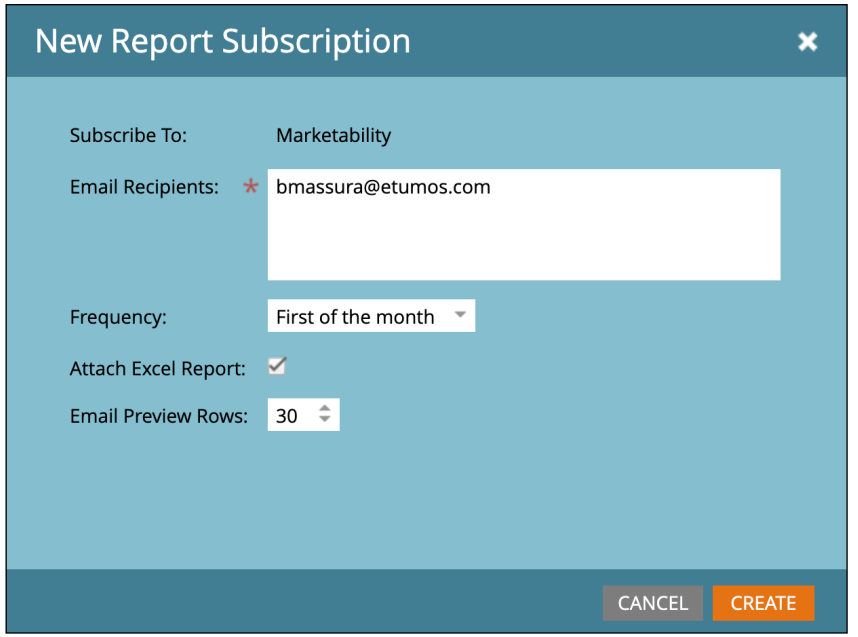
How to Set Up a Report Subscription

- Create a report to monitor the health of your database
  - Be clear in the report name and include a description to provide context
- From the report, go to the Subscriptions tab > New Report Subscription in the gray navigation bar
- Enter one or more email addresses to receive the email
  - Same recommendations apply





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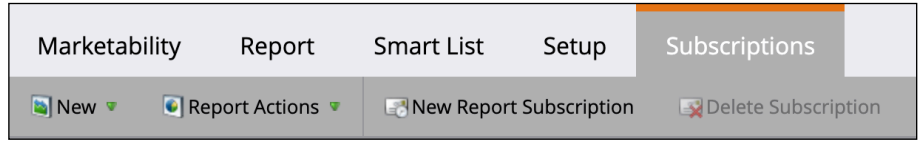
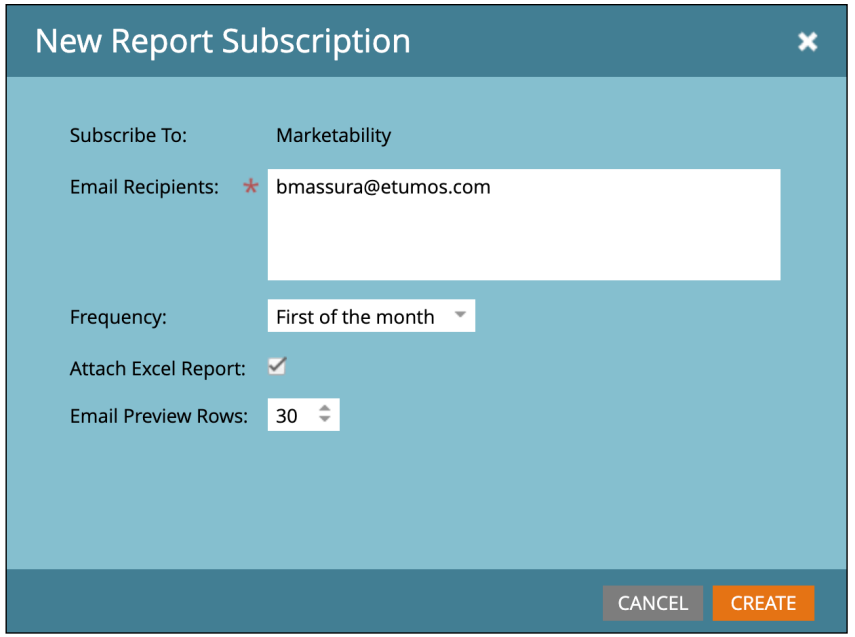
How to Set Up a Report Subscription, cont'd.

- Select a frequency
- Select to Attach Excel Report and include preview rows to give quick access to the information
    - Consider data privacy/security if sharing with people who don't have a Marketo Engage login
- Resource: https://docs.marketo.com/display/public/DOCS/Subscribe+to+a+Basic+Report





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What to Do When You Get a Smart List Subscription

1. Note smart list name and filters included in the body of the email
2. Click through to see smart list description for more information
3. Use downloaded report to manipulate/filter data to help review
    - Doesn't need to be done by someone with a login
4. Click through to the smart list to access the people profiles quickly or to see all people
    - Note: Marketo Engage will send only the first 100k people in the subscription

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What to Do When You Get a Report Subscription

1. Note report name included in the body of the email
2. Click through to see report description and review settings for more information
3. Use attached report to manipulate/filter data to help review
    - Doesn't need to be done by someone with a login
4. Compare results over time
5. Identify data gaps
6. Create smart lists to investigate further on the people meeting certain criteria

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Smart List/Report Subscriptions Summary

Ease of setup		Medium
Flexibility		Medium
Timeliness		Limited
Ease of Interpretation		Medium - can’t add contextual information directly
Scalability		Medium
Best for		Higher-volume, medium-impact issues General instance monitoring

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5. Admin Routines

Be Clear About Who's Responsible

- **Define who is monitoring the shared address** that's getting all these emails
  - Primary admin unless on PTO
  - Multiple admins taking shifts
  - One person handles system notifications, another alerts, etc.
- If not using shared email addresses, be sure to **update recipient email** upon role changes or exit from the organization

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Establish Service Level Agreements (SLAs)

- Establish how quickly the issues must be investigated and resolved
- Different issues may have different base SLAs
- Establish SLAs with IT, CRM admin, etc., for them to help resolve relevant issues
- Don’t keep this info a secret from stakeholders - if priorities have to shift due to an issue, you don’t want it to be a surprise

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Budgeting Time for General Maintenance and Issue Resolution

- If you allocate all your time to new projects, you will feel you have to drop everything, or you push off issues to “someday”
- Budget a certain amount of your work week towards this ongoing effort
  - The first 30 min of every weekday
  - A couple hours every Friday
  - Align smart list/report subscriptions accordingly

- Mark anticipated action dates on your calendar
  - Your instance’s quarterly idle trigger campaign cleanup
  - Any integration connection that has to be reauthorized periodically, such as LinkedIn

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Wrap Up

Key Takeaways

1. Identify and prioritize potential issues
2. Subscribe the right people to system notification alert emails
3. Use alert flow steps for low-volume, high impact exceptions
4. Use smart list/report subscriptions for higher volume, medium-impact exceptions
5. Budget time and set a cadence for monitoring and addressing issues

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