



Boost Email Deliverability with Marketo Engage

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Introductions



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Deliverability Factors

POLL: How often do you think your email reaches its intended recipient?

100%

We apply all **best practices** so it must all be delivered!

95%

We address **factors under our control**, but some delivery issues are inevitable.

75%

It's a **moving target**; it's hard to keep delivery rate high.

50%

Eh... It's a **toss-up**.

25%

We **aren't confident** at all.

???

No idea. How can we monitor this?

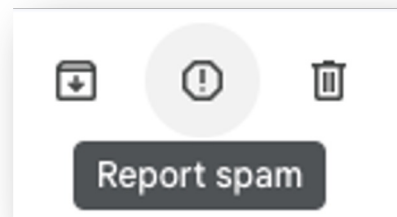
Deliverability 101

- Ability to reach the intended recipient
- Email providers evaluate and “score” sender IPs and domains - each has its own criteria
- They can choose to not allow incoming emails to be delivered if they perceive the sender to have risk factors
- May start routing to junk/spam folder, or eventually, reject/block entirely



Deliverability Factors

- Database quality
 - Sending to invalid/lapsed/spam trap email addresses
- Recipient engagement (or lack thereof)
 - Positive: Opens and clicks
 - Negative: Ignoring/deleting without opening (low open rate), unsubscribing
- Spam complaints
- Email scanners/quarantine tools





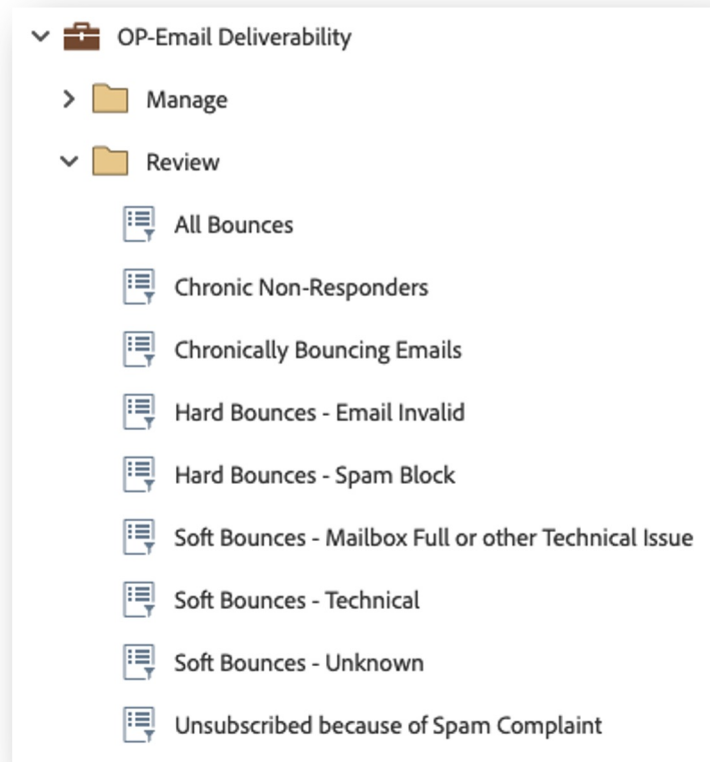
Reports for Deliverability

Instance Analysis - Organizing & Saving Your Work

- Admins/Marketing Operations: Create a Default operational program in Marketing Activities to house reports, smart lists, and more
 - Can import “OP-Email Deliverability” from the Marketo Program Library as a starting point
- Marketers: can create some of the following reports within the marketing programs you manage
- Alternatively, Admins can create dedicated folders in Analytics for reports and in Database for smart lists



Champion Tip: To report across Workspaces, you must build the report in Analytics and set “Global Reporting” to “enabled”, otherwise it will be limited to the Workspace in which the program lives.



Monitor Delivery Trends/Anomalies

- Use to identify significant changes in delivery over time or with specific sends
- Create Email Performance Report; look at % Delivered column
- Focus on larger sends (e.g. 100s or 1000s sent) as stats for small sends will be greatly impacted by actions of one recipient
- Compare to benchmarks; in general <90% is concerning
- Identify any outlier sends with a significantly different %
- Compare over time - is there a steady or sudden decline?
 - Use Setup > Sent Date to specify date ranges
 - Save monthly/quarterly reports elsewhere to compare beyond the 90-day data retention policy

	Sent	Delivered	% Deliv...
WEB ...	5	5	100.0%
Webs...	5	2	40.0%
Webs...	1	0	
Webs...	10	10	100.0%
Webs...	4	4	100.0%
Webs...	49	44	89.8%
Webs...	106	102	96.2%
Nurtu...	1,460	1,179	80.8%
Nurtu...	154	154	100.0%
Nurtu...	1,174	1,142	97.3%
Nurtu...	114	114	100.0%
Nurtu...	1,176	1,145	97.4%
Nurtu...	1,190	1,144	96.1%
Nurtu...	99	99	100.0%

Investigating Delivery Anomalies

- Was there anything different about the low-delivery email compared to the usual?
 - Audience: newly acquired list, list you haven't sent to in a while, a lot of people from a specific company/domain...
 - Content: keywords, quirky subject line...
 - Sending domain: newly acquired brand that may not be verified in Marketo Engage admin yet...
- Smart lists can help identify audience traits - more on that soon!



POLL: Do you think it's spammy?

free

The most notorious keyword



Extraneous emoji and symbols

now!

Urgency

click here

Tip: be more specific in your calls to action

100%

Offers and numbers

CAPS

Unnecessary formatting and fonts

Monitor Complaints

- Use to note volume of recipients who have taken the time to formally complain that they were sent spam (not just unsubscribe)
- Some, but not all, ISPs provide this data to Adobe via feedback loops
- Direct abuse reports to Adobe - people actively seek out where to make a complaint



The screenshot shows a data table with a header row and two data rows. The header row has two columns: 'Unsubscribed Reason' and 'Total People'. The first data row is 'Complaint to mktabuse@adobe.com' with a value of 1. The second data row is 'Direct complaint to abuse@marketo.com' with a value of 1.

Unsubscribed Reason	Total People
Complaint to mktabuse@adobe.com	1
Direct complaint to abuse@marketo.com	1

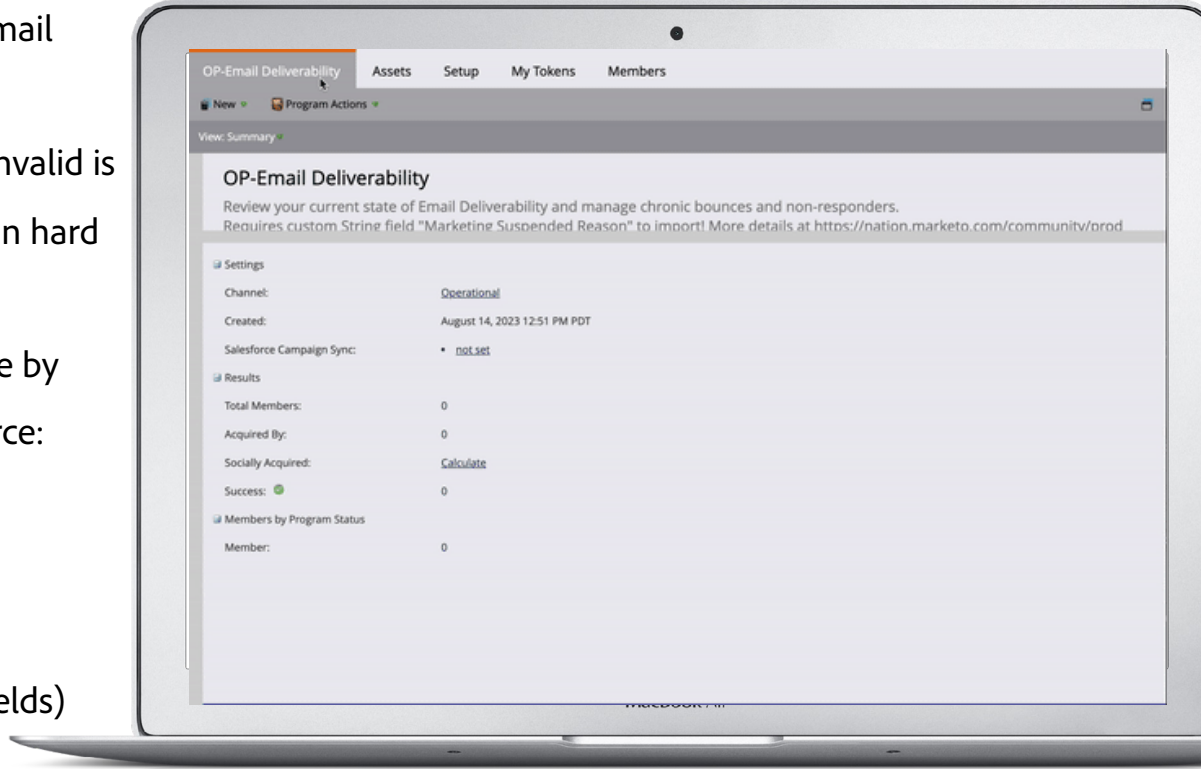
1. Create 'People Performance Report'
2. In Setup tab, Group People by "Unsubscribed Reason"
3. In Smart List tab, can narrow down further with filter "Unsubscribed Reason" contains "complain"

Monitor Database Quality

- Use to identify sources that have higher numbers or rates of non-marketable records - these may not be quality sources for data!
 - Spoiler alert: list imports are notoriously a culprit
 - Check your Adobe Marketo Engage contract for language around list purchases
- The goal isn't to have 0% non-marketable records; it will naturally happen over time as people change roles or make purchases. But you don't want to have it happen in big batches
- This is best done by Admins/Marketing Operations to evaluate across the instance

Monitor Database Quality cont'd.

1. Create People Performance Report 'Email Invalid by Source'
2. In the Smart List tab, add filter Email Invalid is true: automatically set based on certain hard bounce types
3. In the report's Setup tab, Group People by field you consistently use to track source:
 - a. Person Source
 - b. Acquisition Program
 - c. Original Source Info or Original Source Type (system fields)
4. You can also change the timeframe to all time, if desired



Monitor Database Quality cont'd.

- Clone the report and swap out the filter for additional marketability/quality factors:
 - Email Bounced activity: can be broader than email invalid as it includes additional types of bounces
 - Unsubscribed = true: may indicate mismatch between expectations/permissions
 - Blocklisted = true: identified as prohibited by organization; may not want to retain in database
- Why not create for Email Suspended = true?
 - This field is set to true based on certain hard bounces and never resets
 - The record is simply emailable again after 24 hours have passed



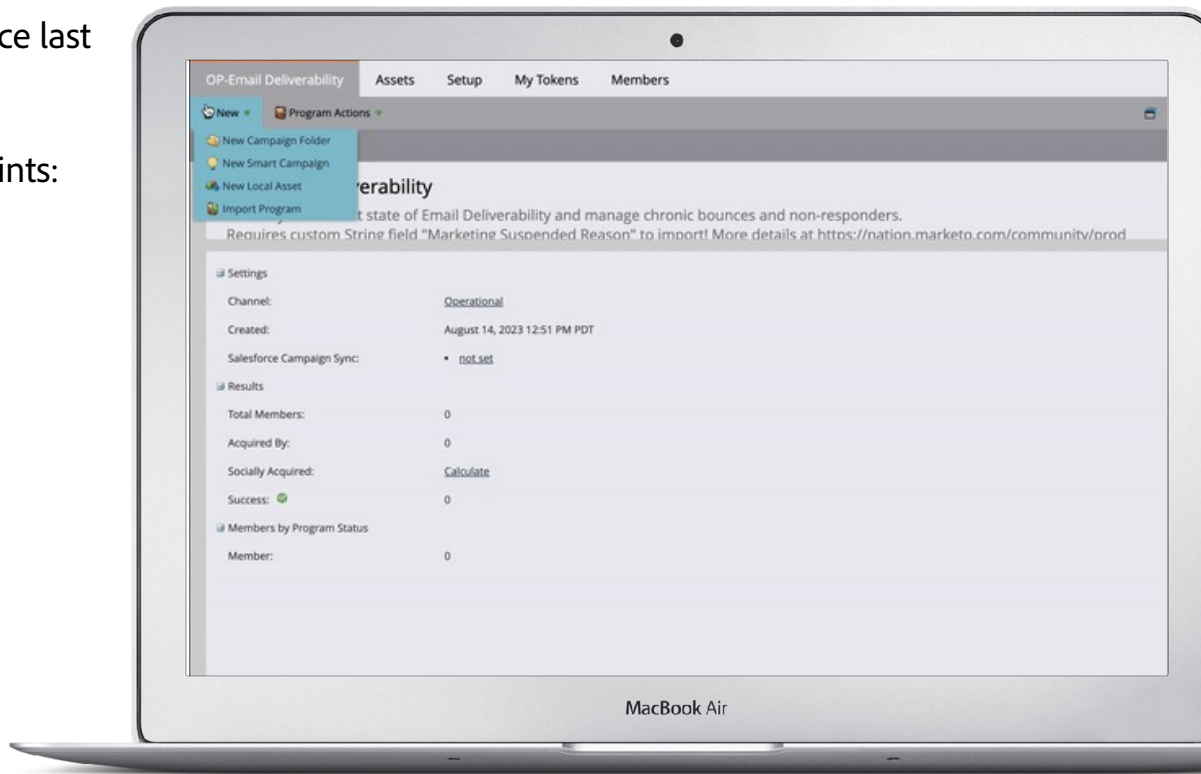
Smart Lists for Deliverability

Monitor Trends Over 30-60-90 Days

- Use to monitor rolling trends month over month
- Takes the “monitoring database quality” reports a step further by surfacing the individual records
- Create sets of 3 smart lists to monitor changes in past 30, 60 and 90 days (this fits within the data retention policy)
- Compare the counts in each to see if there is a change month over month
- You can export these lists for further analysis of commonalities that may not be directly available as “Group by” option in report
 - Certain companies/email domains
- This is best done by Admins/Marketing Operations to evaluate across the instance
- Marketers can create within a marketing program they manage

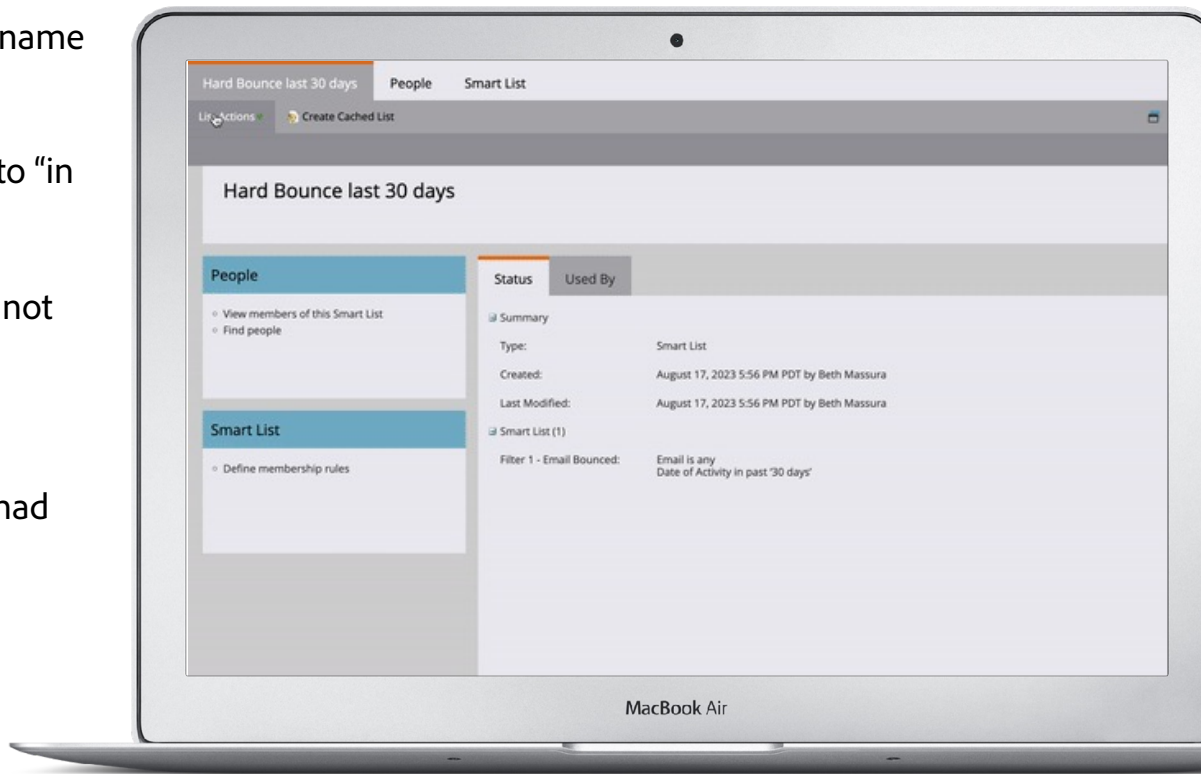
Monitor Trends Over 30-60-90 Days

1. Create a smart list named “Hard Bounce last 30 days”
2. Add Email Bounced filter with constraints:
 - a. Email is any
 - b. Date of Activity in past 30 days



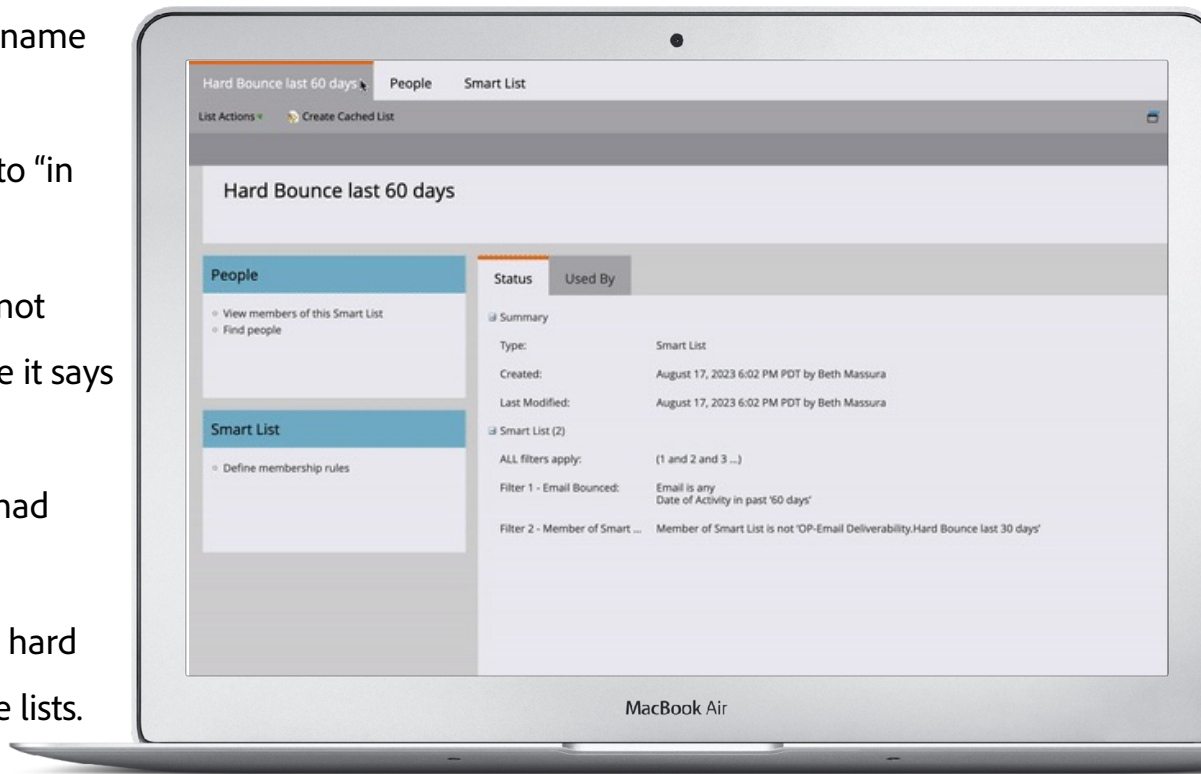
Monitor Trends Over 30-60-90 Days cont'd.

3. Clone “Hard Bounce last 30 days” and name “Hard Bounce last 60 days”
 4. Update the Date of Activity constraint to “in past 60 days”
 5. Add 2nd filter Member of Smart List is not “Hard Bounce last 30 days”
- This will produce a list of people who had hard bounces between 30-60 days.



Monitor Trends Over 30-60-90 Days cont'd.

6. Clone "Hard Bounce last 60 days" and name "Hard Bounce last 90 days"
 7. Update the Date of Activity constraint to "in past 90 days"
 8. Add 3rd filter Member of Smart List is not "Hard Bounce last 60 days" - make sure it says "Use ALL filters"
- This will produce a list of people who had hard bounces between 60-90 days.
 - Now we can monitor a rolling trend in hard bounces, using the count from all three lists.



Monitor Trends Over 30-60-90 Days cont'd.

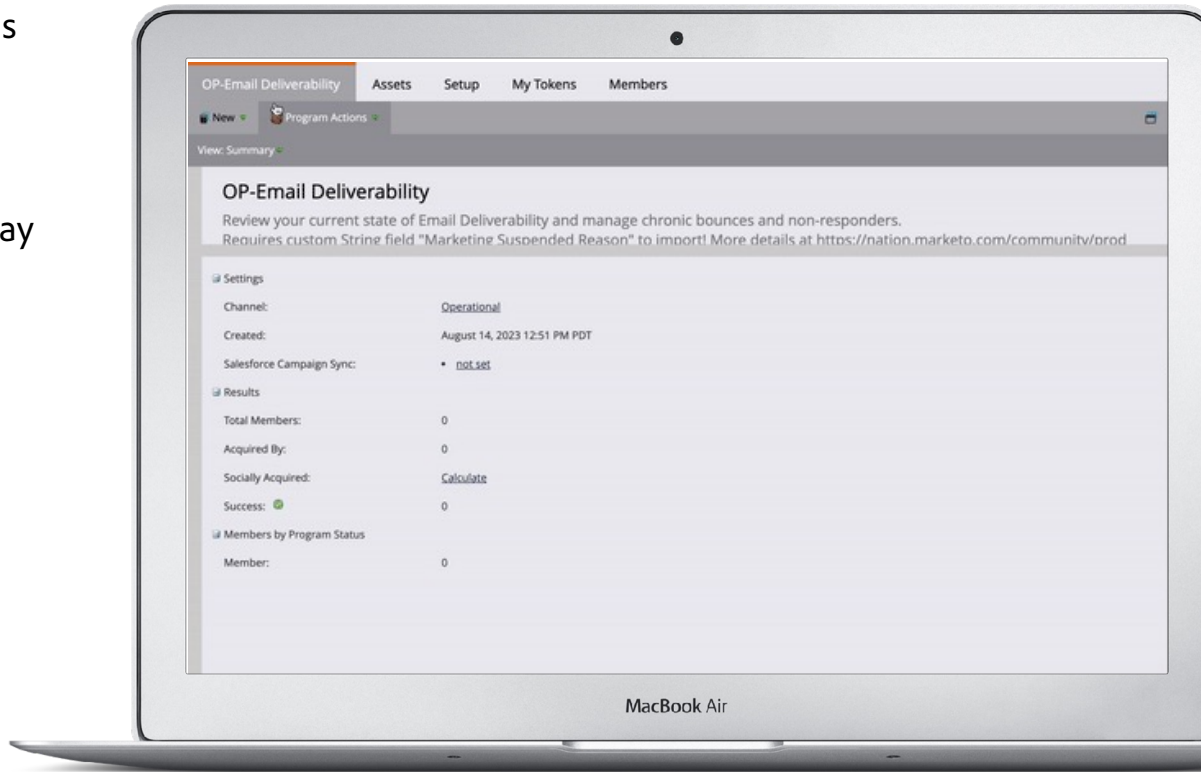
9. Repeat the 3-smart-list process for Email Bounce Soft
10. Add constraint Min. Number of Times = 3
 - a. Or whatever number is appropriate based on email frequency - if you only send ~1/month to an individual, you won't have 3 soft bounces in 30 days
11. Optional filter "Not Was Delivered Email" with same Date of Activity constraint; apply to each list
 - a. But this means that recent newly bouncing records will be omitted

Monitor Trends Over 30-60-90 Days cont'd.

12. Now repeat the 3-smart-list process for the following attributes:
 - a. Email Invalid
 - b. Block listed
 - c. Unsubscribed
13. Swap out the Email Bounced filters for Data Value Changed filters with the constraints
 - a. Attribute is [attribute]
 - b. New Value is true
 - c. Date of Activity is in past [30, 60 or 90] days
14. Plus add a filter for [attribute] = true
15. Be sure to update the Member of Smart List references

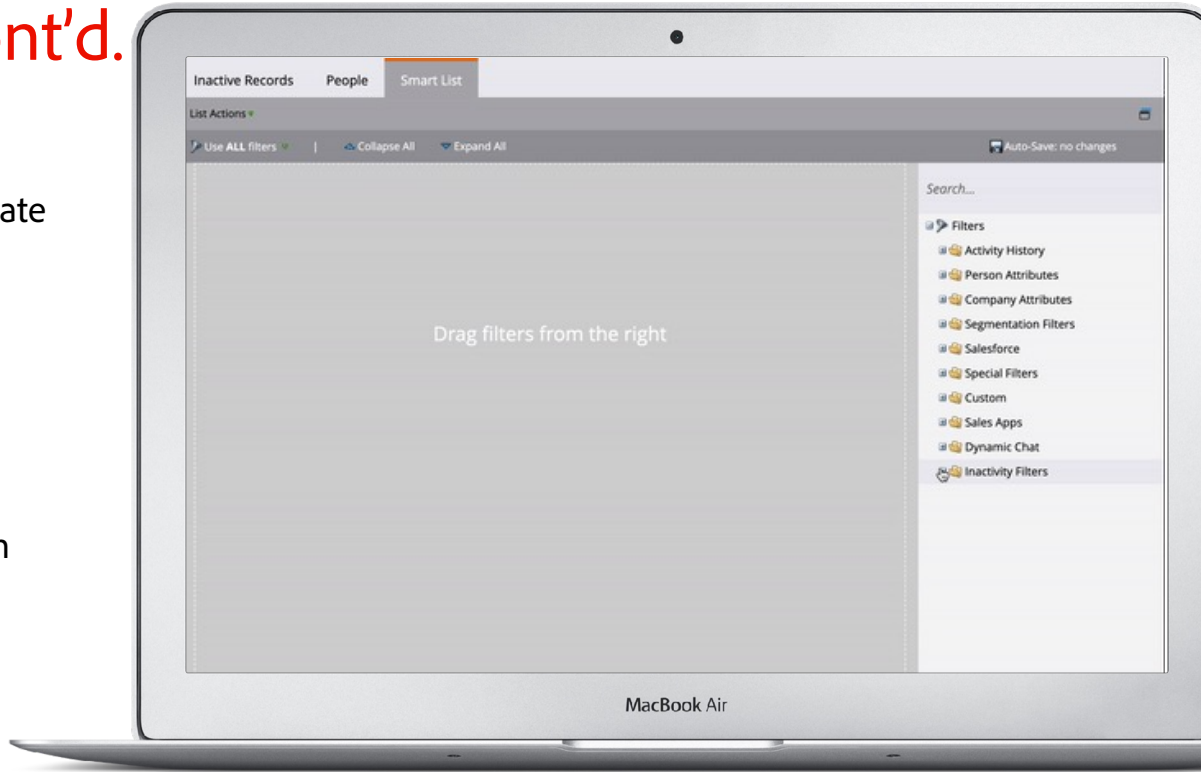
Divide the Database


- Use to consistently target active records and/or exclude inactive records from email sends.
 - Most effective at the instance level - may want to have the admin/marketing operations team create.
1. Create Smart list "Inactive Records"



Divide the Database cont'd.

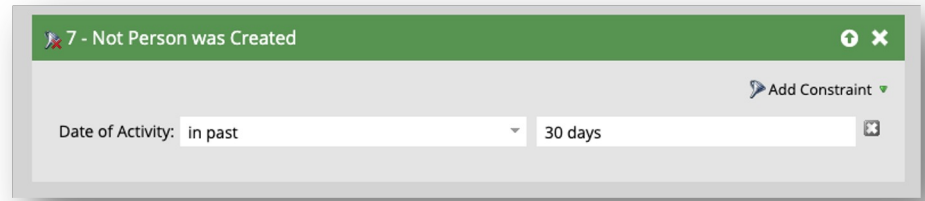
2. Add inactivity filters (i.e. “Not...”) for all person-driven activities for an appropriate timeframe. Examples:
 - Not Clicked Link in Email
 - Not Opened Email
 - Not Engaged with a Dialogue
 - Not Interacted with Document in Dialogue
 - Not Filled Out Form
 - Not Visited Web Page
3. Set filter constraints to “is any” so we don’t have specify which assets



 **Champion Tip:** Be mindful of the 90-day data retention policy for many activity types. You may want to stamp a field with the date of last activity via smart campaigns, since field values are always retained. You can also use fields in segmentations, unlike activity filters!

Divide the Database cont'd.

4. Also, add a Not Person Was Created filter with same timeframe to avoid catching new records who haven't had a chance to engage.
5. Create a Smart list of "Active Records" with positive person-driven activity filters (e.g. Filled out form") and Use ANY filters
6. Include "Active Records" (or exclude "Inactive Records") in your program templates by default
7. Be very selective of when you send to "Inactive Records". But don't send to a whole bunch of them all at once!



Champion Tip: Which activity filters you see depends on what features and integrations your instance has. For example, you may see different activities for other chat tools.



Steps For Admins To Take

SPF/DKIM Settings

Verify Marketo Engage as a legitimate sender for your domain - Requires admin access

1. In the 'Admin' section, select 'Email'
2. Navigate to the SPF/DKIM tab
3. Select Add Domain
4. Enter the URL of your sending domain and click "Add" (Repeat for each domain)
5. Share DKIM Details with IT team to update DNS records
6. Your IT team also adds a line in the DNS entry for SPF
7. DNS records typically propagate within 24 hours.



Champion Tip: Check with your IT team whether a new selector (e.g. m2, m3) will need to be assigned for DKIM with Marketo Engage. If so, work with Support to update this on the back end.

The screenshot shows the configuration interface for example.com. It includes a 'Public Key' field with a long alphanumeric string. Below it, a 'Host Record' field is highlighted with a blue box and contains the value 'm1._domainkey.example.com'. Underneath, a 'TXT Value' field is also highlighted with a blue box and contains a DKIM record string starting with 'v=DKIM1;k=rsa;'. A note at the bottom states: 'NOTE: Once added, verify your domain to enable signing.' A 'CLOSE' button is visible in the bottom right corner.

```
example.com
```

Public Key: MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCgDSIJFodeWteAljyTYckr5ej/waRhXegtqT7y09e/0CHDcjgo3gp/MH12JgFxinVP3c5YupdHdZKMZD1rfpYWf3/dAExPYLNzDUlvqVFFw7jsZyoF7kMZQs9EpxcrWjkZBMPsWzBR5sVYnynJBEJL6M4qGHkc66+FoTLoolRTEQIDAQAB

Host Record: m1._domainkey.example.com

TXT Value: v=DKIM1;k=rsa;
p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCgDSIJFodeWteAljyTYckr5ej/waRhXegtqT7y09e/0CHDcjgo3gp/MH12JgFxinVP3c5YupdHdZKMZD1rfpYWf3/dAExPYLNzDUlvqVFFw7jsZyoF7kMZQs9EpxcrWjkZBMPsWzBR5sVYnynJBEJL6M4qGHkc66+FoTLoolRTEQIDAQAB

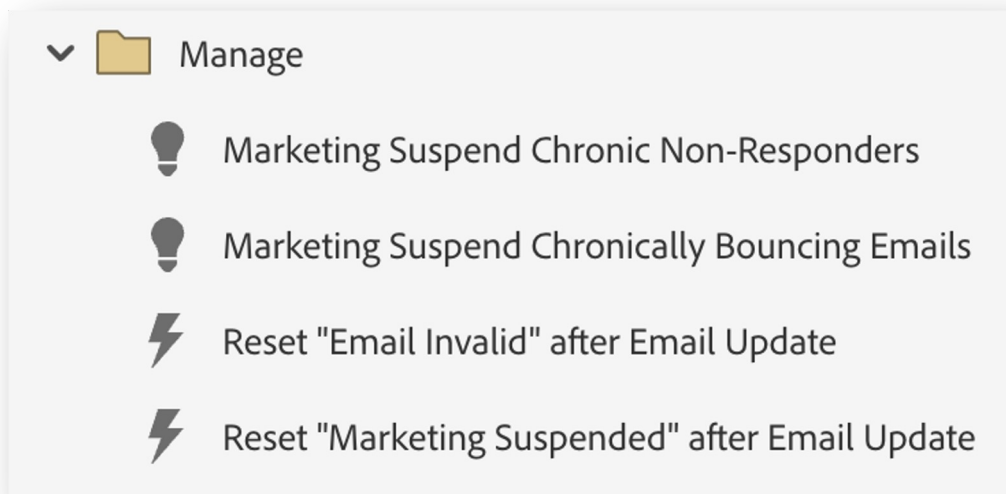
NOTE: Once added, verify your domain to enable signing.

CLOSE

Managing Database Quality with Smart Campaigns

- Batch and trigger campaigns to set and reset marketability fields
- This will enforce via built-in Marketo Engage functionality to prevent emails from being sent to the records
- Build in your Default operational program
- Examples in the OP-Email Deliverability importable program
- Or build a more comprehensive marketability management operational program

 **Champion Tip:** Your organization will need to define the criteria that best fits your database, email frequency, etc.

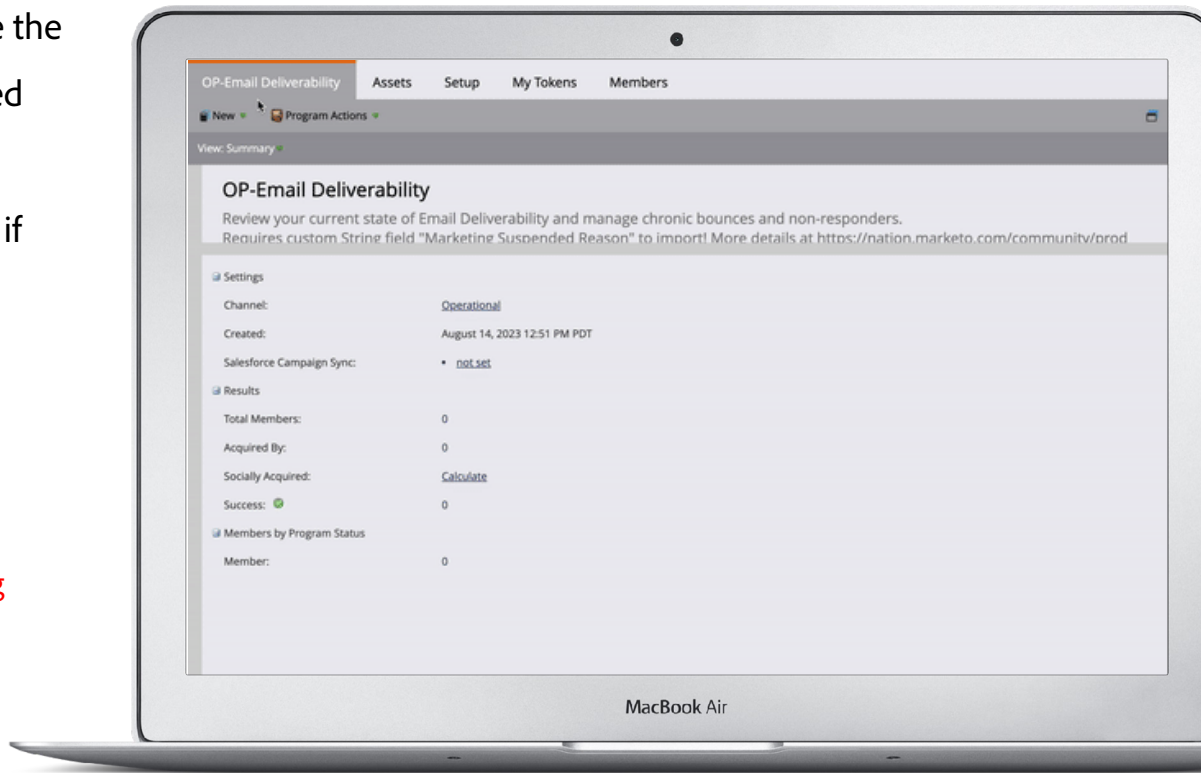


Manage Marketability for Inactive Records

- Use recurring batch campaign to make the “Inactive Records” marketing suspended
- Can unsuspend via a trigger campaign if person re-engages (e.g. form fill)



Champion Tip: Think of all the reasons your organization might want to hold off on marketing to a particular person. You don't want to prematurely unsuspend!

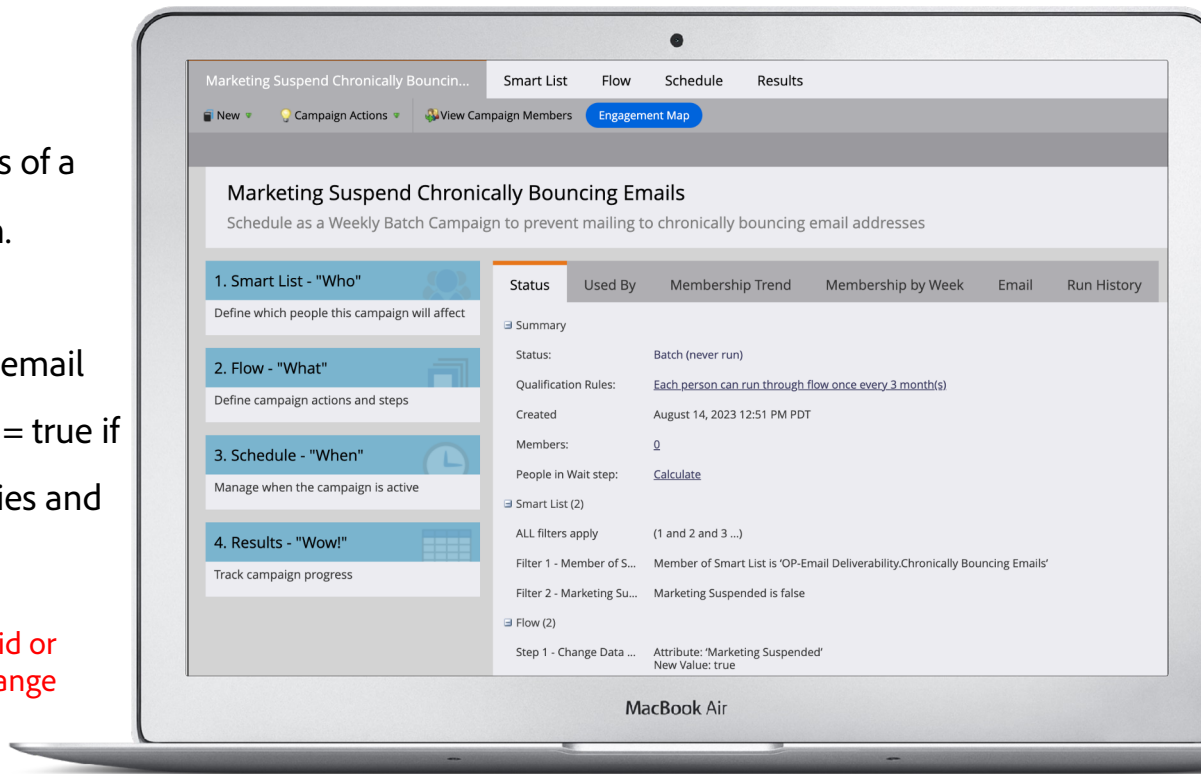


Manage Marketability for Chronic Bounces

- Marketo Engage leaves it up to the organizations to decide what to do for multiple soft bounces (or hard bounces of a certain category) - no automatic action.
- Use batch campaigns to set records to email invalid = true or marketing suspended = true if the record has multiple of these activities and no successful delivery in past 90 days.



Champion Tip: Consider resetting email invalid or marketing suspended based on email address change (would typically only come from the CRM).



Manage Marketability for Chronic Bounces cont'd.

Here's an example of the criteria in the smart list that's part of OP-Email-Deliverability from the program library.

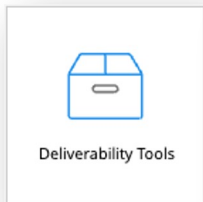
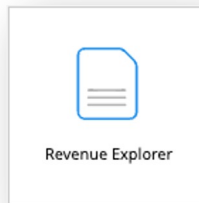
The screenshot shows a smart list configuration interface for 'Chronically Bouncing Emails'. The interface has three tabs: 'Chronically Bouncing Emails', 'People', and 'Smart List'. Below the tabs, there are controls for 'List Actions' including 'Use ALL filters', 'Collapse All', and 'Expand All'. The smart list contains three criteria:

- 1 - Email Bounced Soft**: Includes filters for 'Email: is any', 'Date of Activity: in past' (3 months), and 'Min. Number of Times: 3'.
- 2 - Not Was Delivered Email**: Includes filters for 'Email: is any' and 'Date of Activity: in past' (3 months).
- 3 - Not Person was Created**: Includes filter for 'Date of Activity: in past' (3 months).

Each criterion has an 'Add Constraint' button and a close icon.

Additional Options

- Deliverability pack: new provider this year
 - Additional insights into inbox placement, sends per hour, and more deliverability factors
- Revenue Explorer (advanced reporting)
 - % Complaints and # Complaints available as measures



Sent (Quarter)	Complaints	% Complaints
2018 Q2	0	0.00%
2018 Q4	0	0.00%
2019 Q1	1	0.01%
2019 Q2	2	0.01%
2019 Q3	2	0.01%
2019 Q4	0	0.00%
2020 Q1	0	0.00%
2020 Q2	0	0.00%
2020 Q3	4	0.01%
2020 Q4	3	0.01%
2021 Q1	3	0.01%
2021 Q2	1	0.00%
2021 Q3	0	0.00%
2021 Q4	0	0.00%
2022 Q1	1	0.00%
2022 Q2	0	0.00%
2022 Q3	1	0.00%
2022 Q4	0	0.00%
2023 Q1	0	0.00%
2023 Q2	0	0.00%
2023 Q3	0	0.00%



Wrapping Up

Key Takeaways



Monitor changes in your deliverability to address issues as soon as possible



Admins, keep the database tidy to make it easy for marketers to target quality records



Marketers, make email content relevant to your audience to encourage engagement



Remember that everyone has a part to play in sustaining good deliverability for an organization's instance

Take the next steps today.



Import the 'OP-Email Deliverability' program



Create an 'Email Performance Report'



Create a 'People Performance Report' for Email Invalid



Create a Smart List containing an 'Email Bounced' filter



Admins: use a Smart Campaign with a change data value flow step to marketing suspend inactive records

Appendix

- [How to manage your Marketo database for deliverability](#)
- [Create a revenue explorer report](#)
- [Set up SPF and DKIM for your email deliverability](#)
- [Maintaining a directory of leads bouncing emails](#)

