



May 2021 Release

Adobe Marketo Engage



May 2021 Release Highlights

MARKETO ENGAGE



Account Smart Lists



Next-Generation
Experience Updates



Execute Campaign
Flow Steps



Forms Enhancements



New and Enhanced APIs



Bizible Innovations

Account Smart Lists

ABM automation powered by Account Smart Lists

Target Account Management



Activate your ABM strategy in Marketo Engage

- Account Smart List offers marketers an **Account Segmentation** tool that has dynamic, intuitive and nuanced querying capabilities
- Identify accounts that meet your ICP, have lead engagement, have complete buying circles, and more
- Leverage new Account Attribute and Matched Person filters to identify specific target accounts
- Orchestrate cross-channel engagements for target accounts that meet certain criteria



Account Smart Lists

Account Smart List

The screenshot displays the Marketo Engage interface for managing Target Accounts. The left sidebar shows a navigation menu with categories like Default, ABM, ABM Qualified Accounts, Email Promo, Email Promotion 1, Target Accounts (selected), Max Promos, Summit Promos for ICP, Active Marketing Programs, ASL Automation Folder, ASL Filters, bchan, Keith, M, Nathan, Operational, Shilpa, Sri, and _Archive. The main content area is titled 'Target Accounts' and shows a list of accounts. A filter rule is applied, consisting of two conditions connected by an AND operator: 'Account Score' greater than 70, and 'Account Has Matched Person' with a sub-condition 'Clicked Link in Email' where the email is 'is any' and the date of activity is 'in past' within 30 days. The interface includes a top navigation bar with links to Marketo Engage, My Marketo, Marketing Activities, Design Studio, Database, Analytics, Admin, and a 'Give Feedback' button. The bottom of the screen shows a workspace with a 'WorkspaceB' tab and a '20' icon.

Account Smart List – ABM Segmentation and Activation

Segment Accounts that have...

Attributes of your Ideal Account Profile

- Annual Revenue
- Employee Size

Lead engagement

- Lead opened email
- Lead Interesting Moment

Complete Buying Circles

- Leads with Job Titles VP Marketing, etc

Activate Accounts to...

Activate ad campaigns

- LinkedIn Account Audience Match

Nurture leads who belong to Accounts

- Email, Event, Nurture Programs
- Smart Campaigns

Export Account List

- Activate across all marketing channels

Ultimately enabling marketers to adopt ABM strategies by easily identifying target accounts to incorporate across their marketing efforts.

Account Smart List Use Cases

Competitive Marketing Campaigns

- **Triggered** by using Account Profiling to identify if Account is using competitor product
- **Launch** ad campaigns for look-alike accounts across ad channels showcasing competitive content
- **Generates** product interest to qualify opportunity for sales

Buying Circle Gaps for Net-New Account

- **Triggered** by gaps in buying circles/personas or lack of contacts/people on Account
- **Launch** ad campaigns for look-alike accounts across ad channels
- **Generates** new people in AEP associated to Account

Account Nurturing Campaigns

- **Triggered** by Account person web browsing activity (e.g. pricing page) OR Account matches ICP
- **Launch** email campaigns for known people, in addition to web personalization for unknown people
- **Generates** more product interest to qualify opportunity for sales

Sales Alignment and Handoffs

- **Triggered** by Account Score reaching optimal level
- **Launch** notification to sales teams
- **Generates** timely alignment with sales teams

Cross-Sell/Up-Sell Campaigns

- **Triggered** by opportunity from CRM or Account purchase history
- **Launch** web personalization for known and anonymous visitors from Account for new opportunity
- **Generates** product interest to qualify opportunity for sales

Account Smart Lists – Who qualifies?



On May 7th, 2021, Account Smart Lists is available to all qualified customers



Only customers with a Target Account Management (TAM) license and access to the next-generation user experience qualify

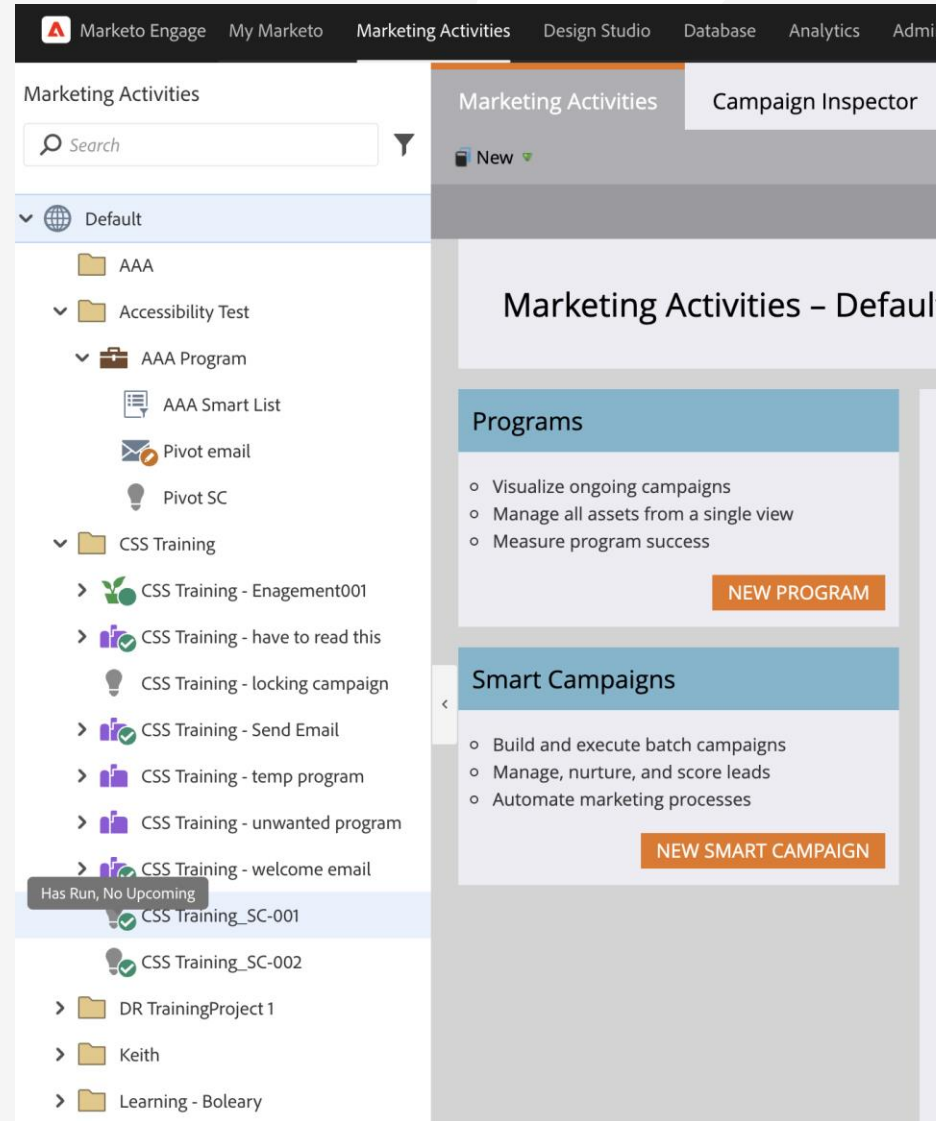
Next-Gen User Experience

Iconography Updates



Newly Updated Icons

- New Icons and state badges have been made larger, more colorful, and more varied in shape to make them visually more accessible.
- The updates will help users tell the icons apart more easily, especially users with visual disabilities such as colorblindness.
- Status badges were also relocated and modified to make them easier to interpret.



Application-
wide

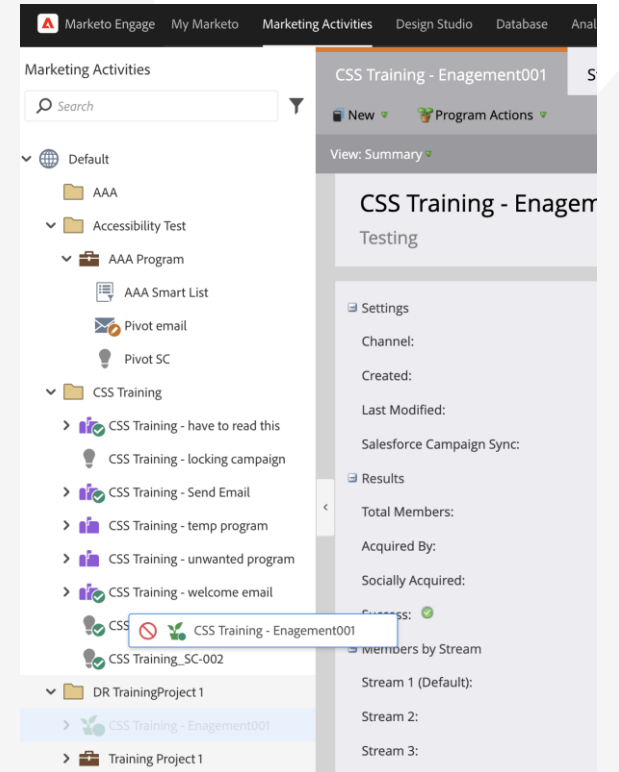
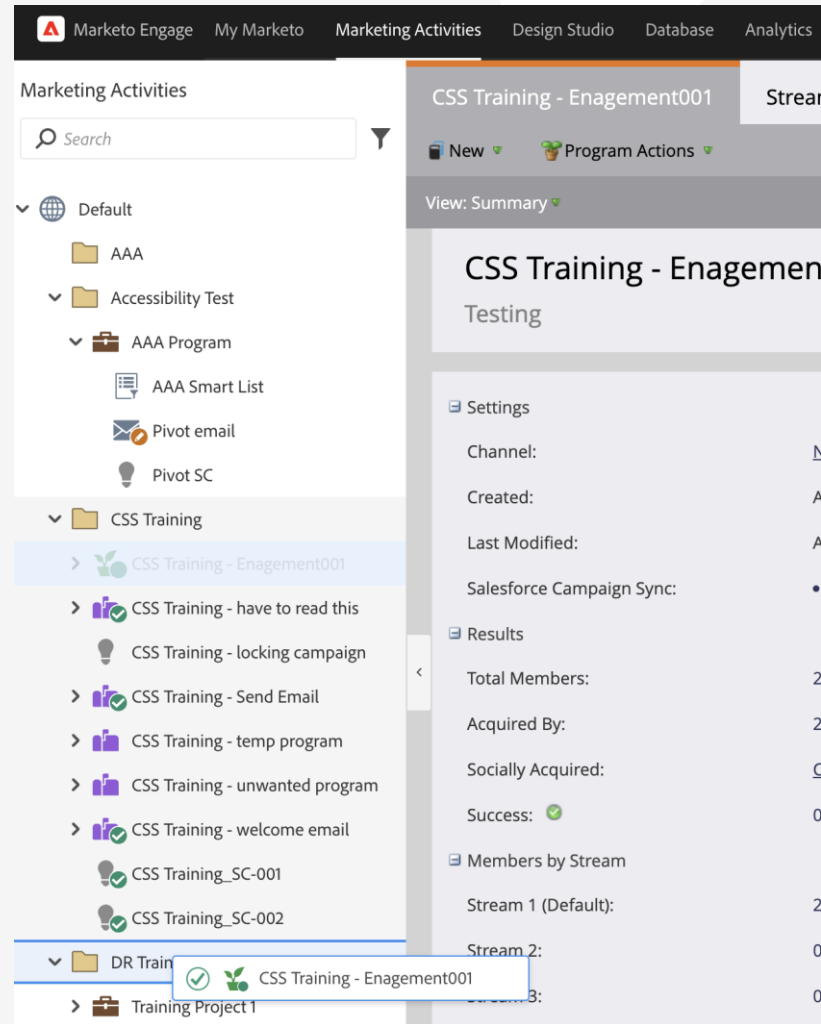
Next-Gen User Experience

Drag-and-Drop



Drag-and-Drop in the Tree

- Restored the ability to move assets and folders within the Tree.
- Newly updated visual indicators while dragging and dropping help users quickly understand the drag and drop actions.



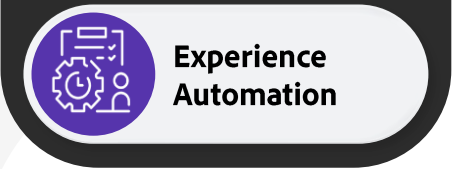
Application-wide

Executable Campaigns

New Flow Step & Campaign Type
for Campaign Orchestration



- Like Requested Campaigns, but executed in series with parent campaign
- Use the results of Executed Campaigns in subsequent flow choices (no wait step needed!)
- Consolidate operational tasks like lead routing, scoring, and data normalization and manage each process in one place
- Optionally pass token context from the parent campaign and get values from its Trigger, Program, Campaign, My, and Member tokens



2 - Execute Campaign

Executed Campaign: ExecFlow Demo 2.Executable - Form Tagging Use Parent Campaign Token Context: true



1 - Interesting Moment

Type: Milestone Description: Form: {{trigger.Name}}
Page: {{trigger.Web page}}

2 - Interesting Moment

Type: Entry Program Description: Program Name: {{program.name}}
Notes:{{my.Entry Program Notes}}

3 - Change Score

Score Name: Person Score Change: {{my.Entry Program Score}}

4 - Change Data Value

Choice 1

If: Country is Canada
Attribute: Billing Country New Value: CA

Choice 2

If: Country is (2) United States; United States of America
Attribute: Billing Country New Value: US

Default Choice

Attribute: -- Do Nothing -- New Value: Select...

Note: Only the first matching choice applies

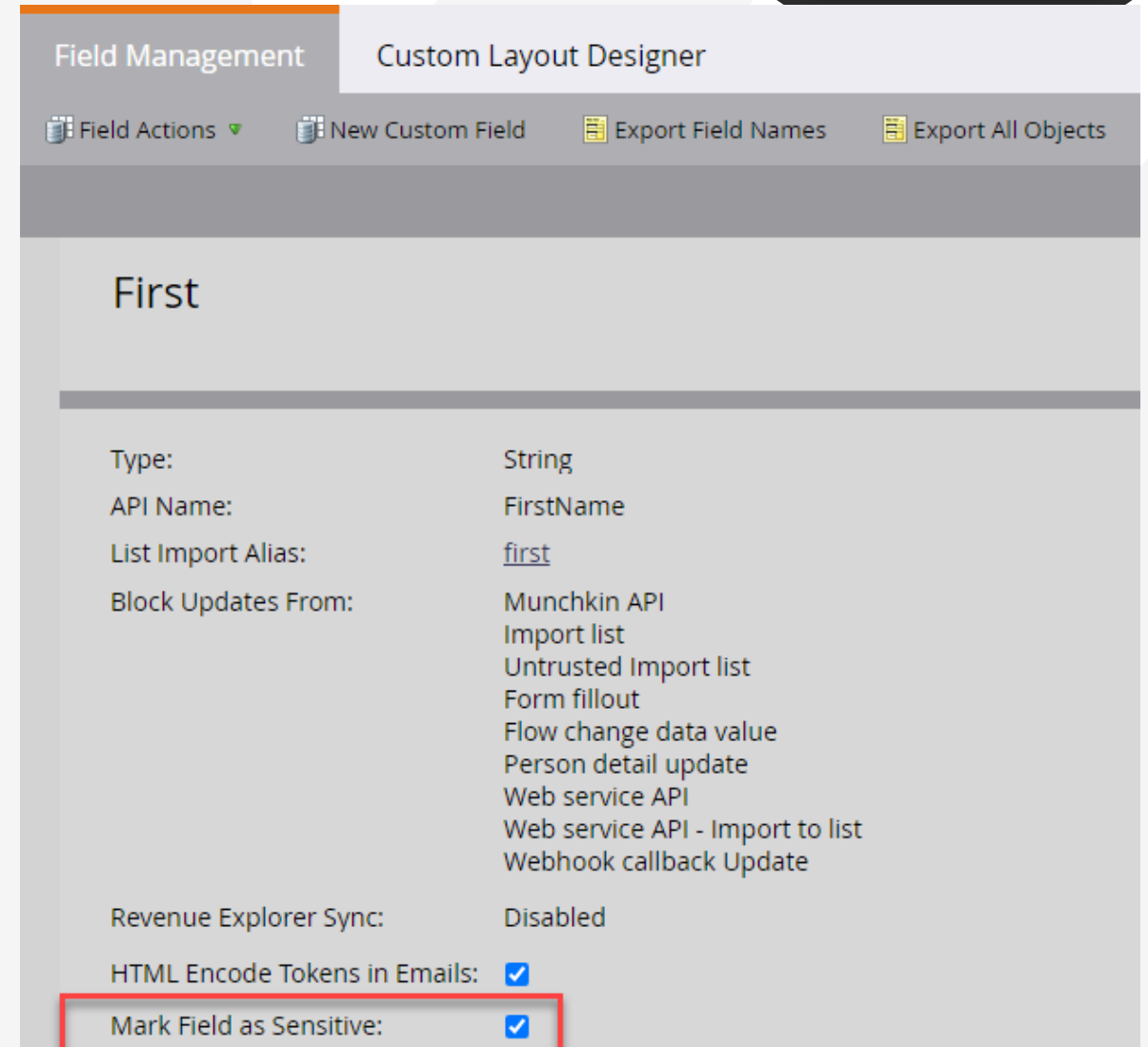
Sensitive Data Fields in Forms

Website Marketing



Flag fields containing PII or other vulnerable data as "Sensitive"

- Admins control at the field level in Field Management
- Sensitive fields automatically have pre-fill disabled on all forms and ability to enable pre-fill is locked.
- Continue offering convenience of pre-fill for other fields without risk of your customer's sensitive data leaking



The screenshot displays the 'Field Management' interface within the 'Custom Layout Designer'. The top navigation bar includes 'Field Management' and 'Custom Layout Designer'. Below this, a toolbar contains 'Field Actions', 'New Custom Field', 'Export Field Names', and 'Export All Objects'. The main content area shows the configuration for a field named 'First'. The configuration details are as follows:

Type:	String
API Name:	FirstName
List Import Alias:	<u>first</u>
Block Updates From:	Munchkin API Import list Untrusted Import list Form fillout Flow change data value Person detail update Web service API Web service API - Import to list Webhook callback Update
Revenue Explorer Sync:	Disabled
HTML Encode Tokens in Emails:	<input checked="" type="checkbox"/>
Mark Field as Sensitive:	<input checked="" type="checkbox"/>

Block Spam Form Submissions

Website Marketing




Enable validation to stop form submissions from programmatic sources

- Server-side checksum validation rejects submissions made by methods commonly used by spam bots
- Administrators can toggle validation on and off in the Treasure Chest section of Admin



Cross-Channel
Engagement

 Person Capture - Reject Invalid Checksum Values

EDIT

Status: Enabled

If enabled, submissions to Marketo Engage Forms with a checksum value that fails server-side validation will be rejected

Developed by weiland

Filtering Email Bot Activity

Prevent unintended sales alerts and inaccurate email reporting through email bot activity filtering



Identify and filter out open and click activity that can be associated with email filters



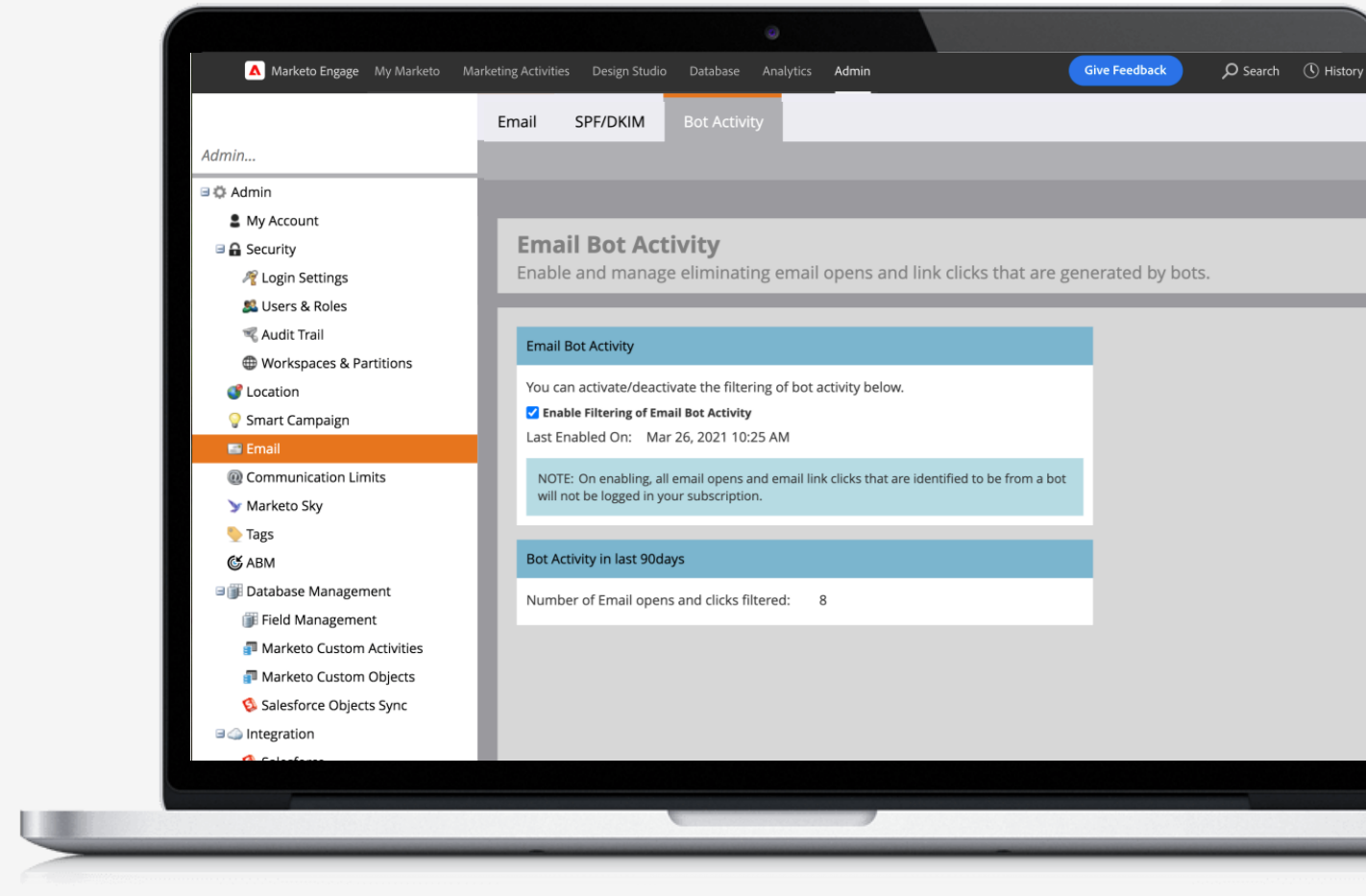
Establish and maintain confidence in your alerts and reporting by filtering out unwanted bot open and click activity data



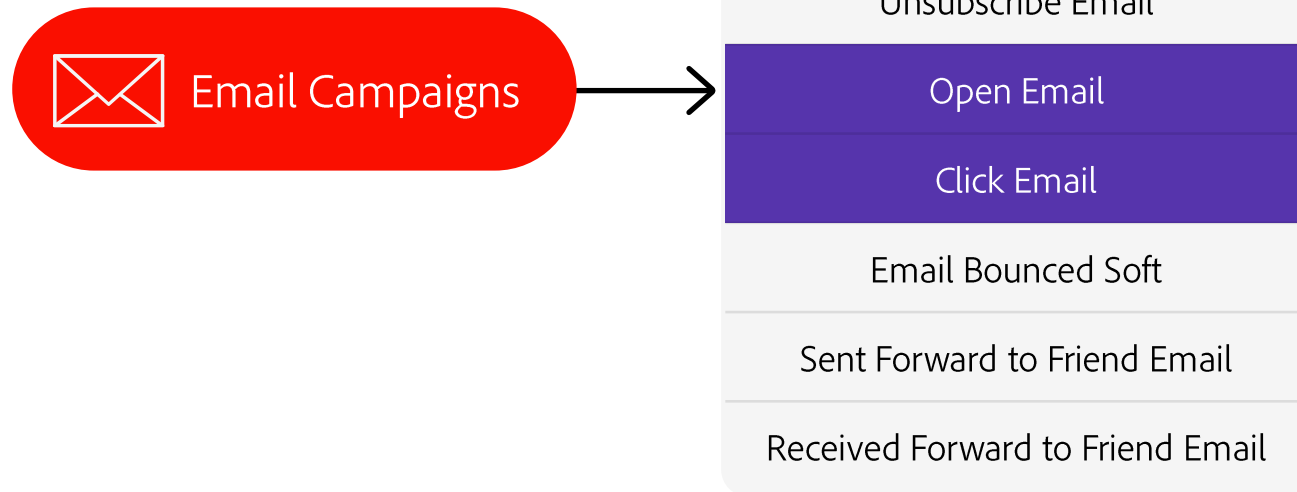
Know total number of activities filtered out in the last 90 days



Marketing Data Environment



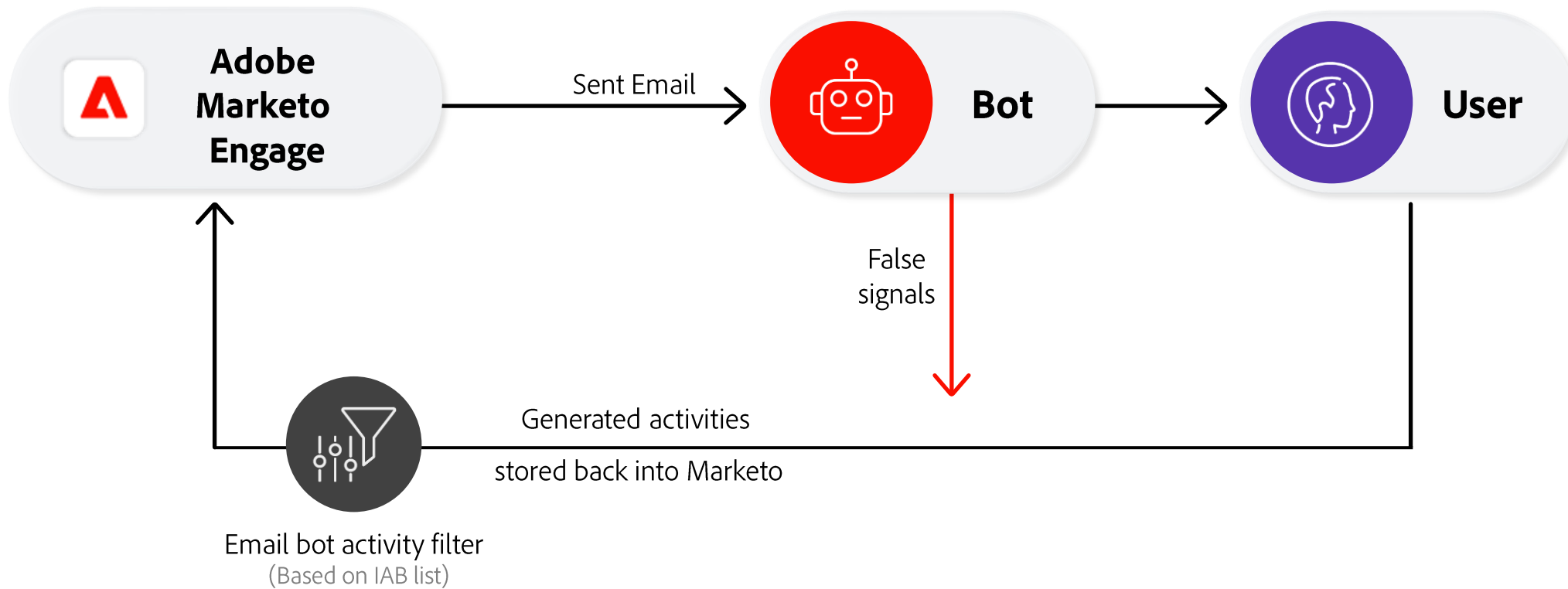
Email Activities



Top Use cases for Opens and Clicks:

- ✓ Lead scoring and qualification
- ✓ Personalize email campaigns
- ✓ Create Performance Reports

Filtering Bot Activity



Search by Person ID



Search by Person ID simplifies ID-based search on the People's list



Easy referencing of unique records if you have IDs from one of the reports or exports



Available on Default Workspace for Leads Database and Static Lists



Marketing Data Environment

app-sjge.marketo.com/#SL1003B2

sfdcjan2

Notifications: 0 Ajita SFDC History Admin Community Help

All People People Smart List

New List Actions Person Actions Delete Person Select All

Database... View: Sample view Does not include anonymous people Smart List: no rules

Full Name	SFDC Type	Company	Industry
Jack Rogers	Lead	Burlington T...	Apparel
Pat Stumuller	Lead	Pyramid Co...	
Bill Dadio Jr	Lead	Zenith Indu...	
Bertha Boxer	Contact	Farmers Co...	Agriculture
Andy Young	Lead	Dickenson plc	
David Mona...	Lead	Blues Entert...	
Kristen Akin	Lead	Aethna Ho...	
Rahul M Mo...	Lead	rahuibb.com	
Kathy Snyder	Contact	TNR Corp.	
Nige Clark	Lead	Numismatics	
Carolyn Cre...	Lead	Ace Iron an...	
Eugena Luce	Lead	Pacific Retail...	
Phyllis Cotton	Lead	Abbott Insu...	
hello lyengar	Contact	Limca WRs	
Violet Maccl...	Lead	Emerson Tr...	
Tom James	Lead	Delphi Che...	
Patricia Fea...	Lead	Internation...	
Betty Bair	Lead	American B...	
Nigel Clark	Lead	Numismatics	
Vidyaan D...	Lead	Aryan Inc.	Banking
Edna Frank	Contact	GenePoint	Biotechnol...
Tom Ripley	Contact	United Oil &...	Energy
Sean Forbes	Contact	Edge Comm...	Electronics
Jack Rogers	Contact	Burlington T...	Apparel
Siddhartha N...	Contact	sForce	
Andy Young	Contact	Dickenson plc	Consulting
John Bond	Contact	Grand Hotel...	Hospitality
Babara Levy	Contact	Express Log...	Transportat...
Jane Grey	Contact	University o...	Education

Page 1 of 2

ID

Search: Name, Email, Job Title
Account Search: [company] Acme Inc.
Id Search: [id] 342

1:50 of 76

MS Dynamics Web API-Based Connection



You can choose to connect Marketo Engage with MS Dynamics using Web APIs with full feature parity for Online versions of MS Dynamics



Web API is on REST Protocol and Microsoft is promoting this over SOAP for new implementations



Web API would need Admins to configure Marketo Engage as an Application on Azure AD and generate Client Credentials as a pre-requisite



Marketing Data Environment

The screenshot displays the 'Microsoft Dynamics' synchronization interface. The main window has tabs for 'Sync Status', 'Dynamics Entities Sync', and 'Sync Errors'. Below these are links for 'Disable Sync', 'Edit Credentials', 'Edit Sync Options', 'Download Marketo Solution', and 'Validate Sync Setup'. The 'Edit Credentials' dialog box is open, showing fields for Username, Password, URL, Client Id, and Client Secret. The background interface includes sections for 'Credentials', 'Field Sync Details', and 'Sync Options'.

Credentials	
Username:	sync1@msdcrm1
Password:	set
URL:	https://msdcrm1n
Clientid:	78892256-5e04-4
ClientSecret:	set

Field Sync Details	
Available fields:	641
Standard fields synced:	95
Custom fields synced:	12

Sync Options	
Enable Microsoft Dynamics Campaign Sync:	true
Default Topic:	[Not Provided]
Default Last Name:	[Not Provided]
Default Person Company:	[Not Provided]

New APIs



APIs



Bulk Custom Object Extract API

- Support for first level custom objects that are associated with leads
- Retrieve custom object records using smart list or static list as filters



Program Membership API

- Full CRUD support for program membership records
- Retrieve records using filter criteria such as program member status, or program member custom field



Custom Fields Metadata API

- Create/update custom fields on lead records
- Retrieve custom field metadata



API Enhancements



APIs



Bulk Lead Import API

- Associate company to lead during import process



Bulk Activity Extract API

- Filter certain high value activities using primary attribute id or value



Lead API

- Retrieve Adobe ECID value associated with lead



Nest Event Programs

- Automate ability to create, clone, move an event program underneath another program type



Enhanced Delete Program

- Improved program deletion capability



LinkedIn Lead Gen Forms Integration (Beta)

Bizible

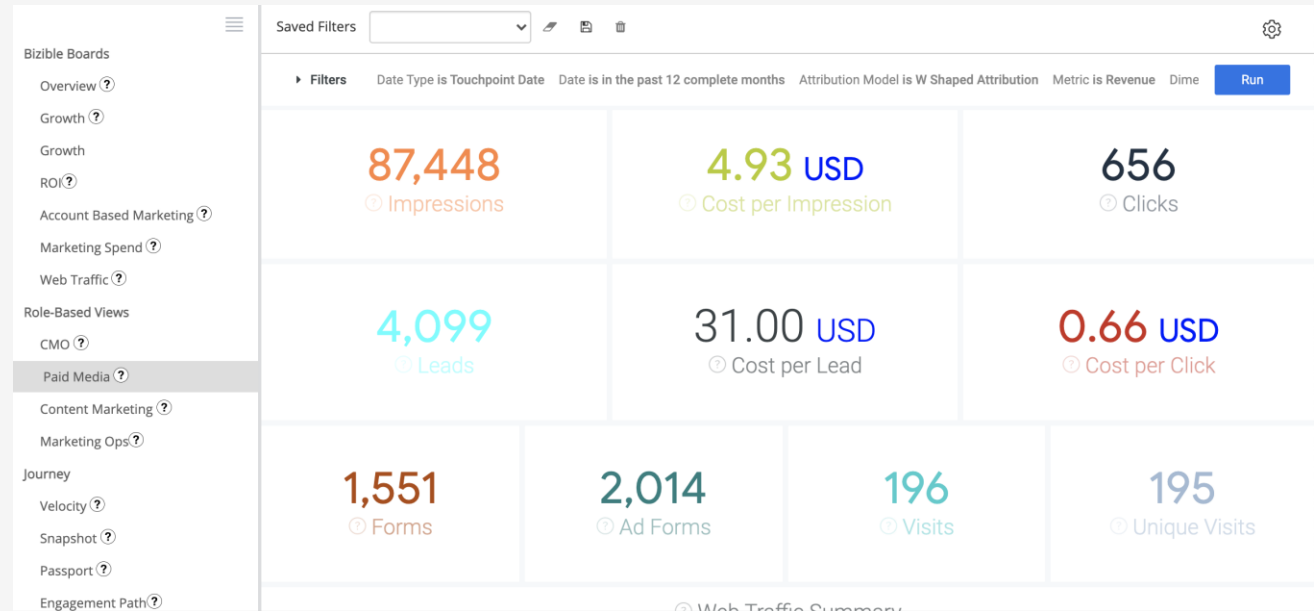


Gain deep visibility into LinkedIn channel spend and ROI

- Automatically retrieves your Ad Form Responses from LinkedIn, enabled by a single click
- Form fills are matched against existing CRM or Marketo Engage leads database to measure against other marketing engagements
- Leverage Bizible's Paid Media and Engagement Path dashboard to dive into the form fills and customer journeys



Marketing
Impact Analysis



Resource Library

ADOBE MARKETO ENGAGE

[Adobe Marketo Engage May 2021 Release Notes](#)

[Summit Session: ABM Is Good B2B Marketing, So Let's Automate It!](#)

[All Summit B2B and ABM Sessions](#)

[Adobe Marketo Engage Product Documentation on Adobe Experience League](#)

[Bizible Product Documentation](#)

[Watch Adobe Summit on Demand](#)

[Marketo Engage Innovations Summit Session](#)

