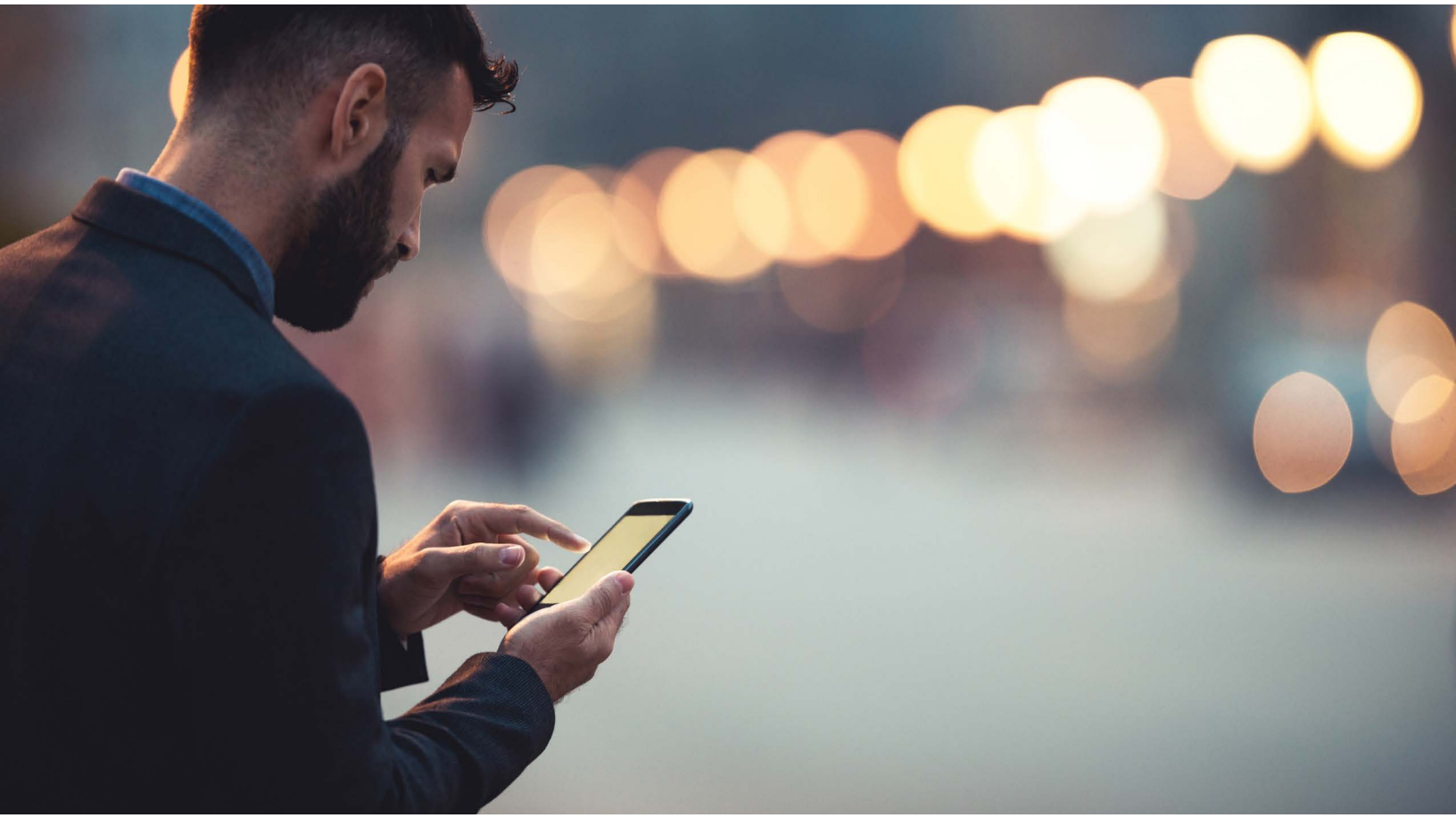


MOVING TO MARKETO

ACCELERATE YOUR ROI WITH A SEAMLESS MIGRATION



Why the Time is Right

If you're reading this, it's likely that you've run into challenges with your current marketing automation platform. Perhaps outdated or complex functionality makes the simplest workflows cumbersome to create and edit. Maybe your marketing team needs to rely heavily on technical users to get campaigns or even an email out the door. It's also possible you are frustrated with the pace of product innovation on increasingly-critical enterprise marketing capabilities like account-based marketing or artificial intelligence applications. Or, it may simply come down to the quality of support you receive from your marketing technology partner.

The fact is, marketers have no time to lose, so if you don't have time-saving capabilities that come along with ease-of-use, ability to master complexity without the need for technical support, or a partner who is in tune with your product needs and the market today, you simply won't achieve the best results. Worse, you may be putting your organization at a disadvantage. If you don't make the move to a platform that empowers your team, you're in real danger of falling behind your peers and competitors.

Why Your Industry Peers Agree

Marketo's industry-leading marketing automation platform (MAP) offers the perfect combination of scale, speed, and ease of use to even the largest enterprise organizations. It is the choice platform of marketing and technology executives in thousands of companies around the world; these companies rely on Marketo to make billions of marketing touches each year. In fact, Marketo was named a leader based on completeness of vision and the ability to execute in the Gartner Magic Quadrant for Digital Marketing Hubs and is steadily outpacing competitive solutions in innovation. Our customers have spoken as well, rating Marketo as the #1 solution for enterprise companies in the TrustRadius report.



"Its ease of use/user experience coupled with performance and capabilities that make Marketo the clear-cut winner. A true differentiator is that Marketo was built for marketers. Other tools out there were built for developers. With Marketo, I spend my time marketing, but other tools on the market require you to know javascipt, table scructure, and other technical skills. All you need to master Marketo is a willingness to learn it, and the time do so, which makes it easiest to get results from."

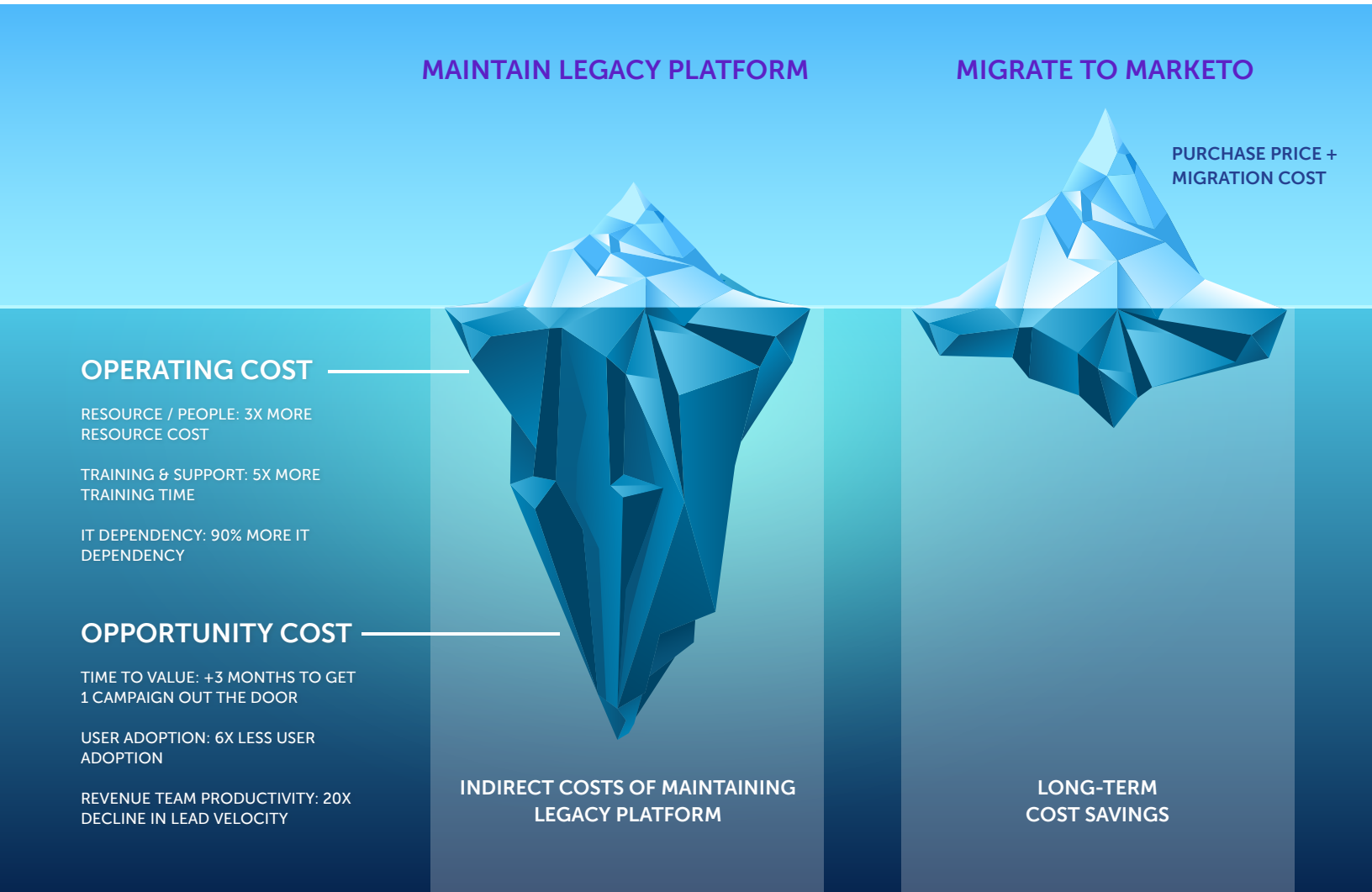
– GARTNER PEER INSIGHTS CUSTOMER REVIEW

Justify Your Migration with Financial Proof

Your decision to migrate to a new MAP is an important one. However, in some cases the benefits and efficiency gains, no matter how great they are, may sometimes not be enough on their own to justify buy in from extended stakeholders.

Your MAP is central to your business and will determine how successful your enterprise will be at driving long-term revenue and growth. The financial impact your decision will have should be carefully considered with longevity top of mind. The most comprehensive way to analyze and justify your migration is to compare the cost of continued operation with your legacy platform to the costs and benefits of migration to a new platform–or the total cost of ownership (TCO) for each. This calculation should encompass all relevant financial factors including purchase price, operating costs and opportunity costs associated with each option.

Here you can see a real-life example of data gathered from previous customers migrating to Marketo. While the decision to maintain your legacy platform may appear as the better option upfront, there are imbedded operating and opportunity costs that should be considered.



If you're considering a move from your legacy platform to Marketo's Engagement Marketing Platform, you've got many things to look forward to

SUPPORT ENTERPRISE GROWTH

Now, more than ever, companies are looking to marketing to scale customer acquisition and fuel revenue growth and prove marketing's impact on revenue. With the right marketing automation platform, access to open APIs, and freedom to integrate with over 600 best in class partner apps, you'll have the freedom to choose the right ecosystem to most effectively engage your customer and empower your team. Marketo serves as the growth engine and platform of choice for about two-thirds of the companies on the JMP Securities–100 Best Privately Held Software Companies list, enabling them to maximize the value of each customer and prospect relationship.

INCREASE TIME TO VALUE

Marketo's unique combination of ease-of-use, power, and sophistication helps marketers ramp quickly and drive immediate value. Built with time-saving functionality and user experience in mind, Marketo enables marketers up the ante on productivity and remove the need of technical support. Rich features like cloning and tokens, drag-and-drop filters, and editable templates make it easy to create, modify, and replicate even the most complex, multi-channel campaigns–an activity that often takes hours of manual work and expensive development resources to complete on other automation platforms. A unified user experience across all functions allows your team to work in one place versus having to jump around different areas of the application. And efficiencies from an improved marketing automation solution extend well beyond your marketing team: real-time, deep integration with other key business systems like your CRM platform can provide timely, prioritized, and actionable insights for your sales or acquisition team to maximize their output, too.

"We needed a powerful marketing automation system that could drive higher return on investment, support our expansion into new markets and enable our marketing team to do more with less. We selected Marketo not just because of all the things the platform can do, but because Marketo has a very deep sector expertise in marketing as a discipline. They understand marketing and marketers' needs. They're not just an IT application vendor. In addition, we wanted a Marketing automation tool that was easy enough for an average marketing manager to understand and use. We did not want to have to demand the support of the IT department."

– STEPHEN YEO

MARKETING DIRECTOR, PANASONIC SYSTEM COMMUNICATIONS EUROPE

MASTER COMPLEXITY WITH EASE

Customer journeys are not linear and marketing campaigns must adapt to the many different paths a customer can and wants to take. Over time, as your campaigns scale for longer life cycles and overlapping complexity, flows can quickly become challenging to manage and easy to break. Marketo's Customer Engagement Engine (CEE) is closely tuned to the way marketers engage customers today. With Marketo, non-technical users can quickly create sophisticated nurture campaigns with ease. More importantly, instead of being restrictive to linear, predefined campaigns that fail to adapt to changing customer journeys, CEE adapts to the customer-controlled journey in real time.

PRACTICAL ARTIFICIAL INTELLIGENCE (AI) AT YOUR FINGERTIPS

Today's customer is most effectively engaged when their experience is as personalized and valuable as possible. In fact, it's increasingly the only way successful companies break through the noise (think: Amazon or Netflix.) For marketers, that means driving meaningful personalization with thousands—or even millions—of prospective buyers across all channels. There's a clear challenge for most teams to scale to those expectations; hand-tuning campaigns to that extent isn't possible. Marketo's ongoing investment in adaptive campaigns—that is, personalized ad campaigns driven by the marketer and AI working together—helps marketers rise to meet the challenge today. While most legacy platforms offer no concrete AI investment strategy or vision, Marketo customers can currently adopt Content[AI] as a tangible step toward using AI to optimize the content they offer prospects through email and web.

MAXIMIZE YOUR ROI WITH CLOSED LOOP REPORTING

Migrating to a new MAP provides a terrific opportunity to assess what is working, what is underperforming, and where you can improve–whether it's optimizing spend or increasing return from your marketing efforts. Just like when you're moving to a new house, moving platforms offers a chance to figure out what is valuable, purge what you don't need, and design your future with an eye toward doubling down on what really works. Even more, the combined product strength of Marketo and Bizible provides marketers enhanced visibility into full funnel analytics, from campaign planning through to execution and revenue, enabling teams to more intelligently spend their budgets and only invest in things that offer them the greatest marketing returns.

JOIN A PASSIONATE COMMUNITY

Marketo provides a dedicated, in-house technical account manager as a partner focused on your success. Save yourself unnecessary headache and don't be a number in a queue waiting on support to give you the answers you need. The Marketing Nation, our community of more than 60,000 like-minded marketers and digital marketing thought leaders, is a great place to get new ideas and share best practices. And, with a platform like Marketo, you've got an ecosystem of LaunchPoint partners that offer hundreds of applications to help you extend the capabilities of your system and the value of your platform so that you're poised for future growth. Even better, you don't have to go it alone or lose any momentum as you make the switch. Marketo provides all the tools and guidance you need to put you on the fast track to better marketing results.

QUANTIFY THE UPSIDE: HOW MUCH TIME WILL YOUR TEAM GAIN?

Use the worksheet below to time yourself or your team on how long it takes to compete these every-day marketing tasks with your current platform—then compare it to the time it took us to complete with Marketo.

Activity	Do It with Marketo	Our Time	Your Time
Build a landing page with a 5-field form Example: a registration landing page for an upcoming webinar	Robust, fully-responsive landing page capabilities that leverage drag-and-drop design with WYSIWYG editing make it easy to create effective landing pages that look great on any device–without need of technical assistance!	5 Minutes	
Create an invite email and reminder email Link this to the registration landing page	Drag and drop modular layout makes it easy to navigate and quick to customize all aspects of our ready-to-use templates including color, style, imagery, dynamic content etc.	3 Minutes	
Segment your invite email based on 3 criteria Example: Executive Role, lives in Virginia, Downloaded your ROI whitepaper	With easy to use drag and drop filters, Marketo smart lists allow you to quickly define exactly who you want to target based on role, geography, and behavior. Avoid extra clicks, new windows, and redundant steps that come along with the everyday task of creating new segments.	30 Seconds	
Select different emails for multiple groups Example: Send 3 different emails to registrants depending on their job title	Adding campaign constraints that go beyond a simple yes/no is a core task for most marketers. Marketo makes it quick and easy to drag and drop these constraints without having to do yes/no decisions for each piece, wait step, etc.	1 Minute	

Pull together the above assets into a campaign	Marketo's campaign flow set up provides a clear line of sight making it possible to master complexity without losing ability to scale as campaigns grow over time. This set up provides flexibility needed to deliver non-linear engagements by listening for and responding to new customer behavior.	**10-15 Minutes**	
Replicate the campaign for 3 other uses Example: Clone the same program for 3 separate webinars	Program level cloning is unique to Marketo and allows you to avoid unnecessary days of re-creating work. In a matter of seconds, replicate even the most complex programs (including tags, tokens, and content) while using tokens to customize individual assets.	**8-10 Minutes**	
Create a trigger to notify sales of leads who fill out the registration form	Interesting moment flow steps give your sales team visibility into the cool things your leads are doing. Instantly define the activity and set the trigger to notify your sales team in just two steps.	**1 Minute**	
Add a third email to the middle of your stream	Add, remove, or reorder any content pieces in an engagement stream and Marketo will automatically make sure everyone in the stream gets the most recent content then resumes back to where they were. Do this without the need of re-white boarding the process, disconnecting existing campaigns, or having to worry about sending duplicate content.	**5 Seconds**	
Create a lead score rule: + 5 points for all leads who registered	Creating a new scoring model in Marketo takes just a few clicks. With drag and drop fields quickly build scoring rules based on behavior, demographic and firmographic data. Multiple scoring models are a snap with cloning for global organizations, multiple business units, or product lines.	**5 Seconds**	
Determine the total revenue contributed by webinar programs last year Or choose a similar program such as tradeshows or digital advertising	Save time number crunching with Marketo's Program Analyzer and get quick insights into pipeline, revenue, and ROI first-touch and multi-touch attribution.	**3 Minutes**	

How much time did you get back? What could you do with this extra time on your hands?

Ready to make your move? Here's what to do next.

You wouldn't consider moving from one home to the next without a game plan. In your professional life, this move is just as momentous. With that in mind, here are some tried-and-true steps for a fail-safe marketing automation platform (MAP) migration:

1. **Treat it like a project.** With so much riding on a successful migration, it's unwise to approach it as an off-the-cuff exercise. Instead, assign a project manager and identify stakeholders across your IT, marketing, and sales organizations (if applicable). By engaging the right team members from the get-go, you'll move more rapidly through the migration steps and be better aligned throughout the process. Plus, a project manager overseeing the migration will help coordinate steps and keep it on track.

2. **Outline your future goals.** Because most migrations are focused on enabling a better future, now is the time to document your vision and the related goals. To that end, meet with your team and stakeholders to ensure you consider everyone's perspectives on how you want to evolve your marketing capabilities, including priorities versus nice-to-haves. That way, you can align the move with your needs and focus on your goals—for today and tomorrow.

3. **Plan the migration.** Map out a workable plan and timeline for migrating the essentials so you can carry on day-to-day activities without interruption. Then, you can think about what to add and when to fuel new programs and campaigns. Hand in hand with this, consider how to take advantage of Marketo's best practice program templates.

4. **Get a holistic view of your MarTech stack.** If your organization is like many, it has made marketing automation the heart of it's marketing technology stack. That's why it's essential to take an inventory of your systems–such as webinar platforms, web analytics, customer relationship management (CRM), and content management systems (CMS)–that integrate with your MAP (or that you'd like to integrate). With an accurate map of your current tech stack, you can develop an integration project plan. For businesses with a CRM system, remember to audit the objects and fields in your current marketing tool and CRM system and plan your data migration strategy for both CRM and non-CRM data. This will help you plan your data flows, understand your API call requirements, and avoid running into any surprises when you make the switch.

5. **Clean up your assets.** Figure out which elements of your existing platform and tools you need to see reflected in Marketo and which you can and should leave behind. As part of that, inventory and prioritize the migration of your assets (e.g., forms, landing pages, and emails), campaigns, processes (e.g., demand generation, nurturing, and customer lifecycle), and data (e.g., audience segment lists and lead scoring). Then, evaluate their cleanliness–now's the time to clean them, if necessary.

6. **Choose migration services to help streamline and accelerate your efforts.** Marketo offers a guided migration service for basic advice and direction to help your team work through migration activities. For those who want additional help, we offer more extensive professional services that include roadmap development and hands-on migration activities.

KEY QUESTIONS TO ASK ABOUT MIGRATION SERVICES.

Changing platforms in the enterprise is a project, but proactive planning can make it a smooth one. Below is a list of questions and a worksheet that will help you prepare for a successful migration.

- Do you have a services organization or do you outsource client implementation?
- Based on our use case, do you think a third-party partner would be better for our implementation? If so, do you have recommendations?
- Can we use some of our own resources to assist with migration activities to control costs?
- Are there resources available to help us plan our migration and/or provide hands-on help?
- How many customers have you moved from (insert vendor's name) platform to Marketo?
  - Can you provide customer references we can speak to?
- Does your implementation package/service include migration consulting?
- How flexible is your migration service's scope?
- How will you support our particular use case?
- How do we manage migration across divisions /or product lines (workspaces & partitions)?
- How will we plan to keep the engine running through the migration?



3-STEP MIGRATION PLAN

Migration timeframes will vary depending on your specific use case and needs. However, there are certain steps you'll take along the way. Here is a typical migration plan with three tangible steps: content, data, and programs, and everything you might consider moving or building in each.

Step 1: Content

Create landing pages and validate built landing pages in Marketo

Build forms for web integration (iframe, embedded form, API)

Test forms to confirm data for all fields are inserted into Marketo

Import images into Marketo

Import PDFs into Marketo

Import HTML code of emails into new emails within Marketo

Test emails (send samples) to check links and display

Step 2: Data

Import unsubscribe list (CSV)

Import data (marketing ONLY data)

Create suppression lists

Build the following:

- Core and target segments
- Relevant product lists
- Relevant regional lists
- Relevant business unit lists
- Logic to add new leads to your lists

Step 3: Programs

Define: Lead partitions and workspaces

Channel & tag discussion

Define interesting moments

Discuss PPC/digital marketing plan

Review scoring program

CRM integration

Review flows and associated content to be migrated

HIT THE GROUND RUNNING WITH A BEST-IN-CLASS SUPPORT SYSTEM

We're sure you're excited to get going with Marketo and take your marketing to new heights. That's why we strongly recommend you observe the following best practices.

TAKE FULL ADVANTAGE OF AVAILABLE IMPLEMENTATION SERVICES

As you implement Marketo, we can modulate our coaching and build customized sessions so you get the most from our onboarding services. Though you may not need to start from scratch, questions will come up as you learn about new features and capabilities. Use your time with our consultants during your implementation for coaching and hands-on guidance.

GET TRAINED ON MARKETO

If you're migrating from another marketing automation platform to Marketo, you may be a more advanced user, but you'll still need to learn the ins and outs of the Marketo platform and get hands-on experience using it. Take advantage of Marketo training to get an overview of the basics. Even if you're an experienced user, it will introduce you to the terminology for features and concepts in Marketo. Next, you should visit the Marketo University to review on-demand training courses. Also, check out the resources section of our website for access to definitive guides, ebooks, recorded webinars, and other educational assets that can spark ideas about ways to use your new platform.

RACK UP SOME QUICK WINS

To gain quick momentum and support, consider starting with simpler campaigns, like one-off emails, and work up to more sophisticated programs. This will help you get up to speed with Marketo and its features. By the time you're ready for more elaborate campaigns, you should have a good feel for how Marketo works and ideas for streamlining or otherwise improving your complex campaigns.

PLAN AHEAD FOR A REVIEW AND OPTIMIZATION

At the 9-to-12-month mark, you may want to engage Marketo to review your MAP instance and campaigns for guidance on how to get the most from all your migrated programs. This is also a good time to check in on best practices and get recommendations for continuous optimization.

"We went from a two year long effort rolling out Eloqua that didn't go anywhere to signing with Marketo in one month and four months later rolled out globally to three regions and over 40 marketers"

– CHRIS ROECKL

VICE PRESIDENT OF WW FIELD MARKETING, PULSE SECURE

GET INSPIRED BY INDUSTRY PEERS WHO HAVE GONE BEFORE YOU

It's one thing to read about the best approach to a migration; it's another to see how it's gone for others.

VERSIONONE®
Agile Made Easier

A Smooth, Seamless Transition to Marketo

VersionOne's platform helps small, midsize, and large companies accelerate software delivery and increase business agility. When the Director of Marketing Operations, Kristen Wendel, made dramatic changes to VersionOne's digital marketing strategy for enhanced agility and scalability of marketing campaigns, it included replacing their legacy marketing automation tool with Marketo. VersionOne worked with Marketo to implement a platform that would enable broader transformation towards operational excellence and enterprise-focused marketing programs.

Kristen's major concern was how the migration would impact current processes, especially those involving VersionOne's free software trials, a key source of leads. Marketo suggested an approach that supported legacy processes while building and testing the infrastructure and updated processes underneath. This approach not only smoothed the transition but also enabled VersionOne to build a new freemium trial flow. The Marketo consultant configured a dynamic landing page with multiple forms for the trial validation process in less than an hour. This same functionality took months to develop with the previous solution. As Peter Herbert, Vice President of Marketing, put it, "Marketo turned months into minutes."

"Marketo partnered with us every step of the way, enabling us to seamlessly complete our migration in just three months. Marketo consultants led the full implementation, including database synchronization, programs setup, lifecycle and lead scoring models, channel definitions, lead source appending, modelers, and Revenue Cycle Explorer reporting."

– KRISTEN WENDEL

DIRECTOR OF MARKETING OPERATIONS FOR VERSIONONE

CONCLUSION:

DON'T WAIT TO GET ON THE PATH TO BETTER RESULTS

You'll be in good hands as you begin migrating from your marketing automation platform to Marketo. With over 4,000 deployments worldwide, our team has deep expertise with a wide variety of use cases and best practices. The organizations that have already made the switch have realized numerous benefits, including greater efficiency, ease-of-use, support and revenue impact, to name a few.

Remember: there's never a perfect time to roll out new software or start a new project. You'll always be busy. But the longer you wait to initiate a migration, the longer you'll have to wait to see your revenue move up and to the right. Now that you know you'll benefit from the switch, you can fully convey the opportunity cost of your current platform and communicate a plan to realize more value from a solution that fits your long-term needs. The sooner you get started, the sooner you'll begin incorporating the value of Marketo into all of your programs—so your team can do more and achieve better results.



Marketo®

Marketo, Inc., offers the leading Engagement Platform that empowers marketers to create lasting relationships and grow revenue. Consistently recognized as the industry's innovation pioneer, Marketo is the trusted platform for thousands of CMOs thanks to its scalability, reliability, and openness. Marketo is headquartered in San Mateo, CA, with offices around the world, and serves as a strategic partner to large enterprise and fast-growing organizations across a wide variety of industries. To learn more about the Marketo Engagement Platform, LaunchPoint® partner ecosystem, and the vast community that is the Marketing Nation®, visit **www.marketo.com**.