**Appendix III – Checklists**

If you run a lot of campaigns like I do, you probably think you have your process down. Or do you?

Every now and then a campaign goes out with a typo or worse—a wrong registration link! In this Guide we’ve discussed ways to handle those mistakes. The best way thought is to not make the mistake in the first place. Use a checklist to ensure you have all the components of the campaign ready.

These are outlines only and I encourage you to modify them to suit your own business needs. You can download my template here. [LINK TO FILE]

Campaign Checklist

|  |  |  |  |
| --- | --- | --- | --- |
| **Done?** | **Action** | **Comments or Additions** | **Where** |
|  | Goal of Campaign | Lead gen, nurture, download? | Offline |
|  | Target Audience |  | Offline |
|  | Copy Finalized |  | Offline |
|  | Intended Send Date |  | Offline |
|  | Create an SFDC Campaign (cloned or New) for your Program. | W2L Code | Salesforce.com |
|  | Create a Program or Smart Campaign | Program Channel | Marketing Activities |
|  | Smart List Selection | Lead Database Smart List or on the fly. Verify counts. | Marketing Activities or Lead Database |
|  | New or Clone Email | Is this the right template?  Right Naming Scheme? | Program or Design Studio |
|  | Update Tokens | If using a Program Template, update your tokens. |  |
|  | Landing Page Content | If needed |  |
|  | Email Content | If needed, verify tokens work. |  |
|  | Registration or Tracking Flows | For Programs | Will vary by goal. |
|  | Invitation Send Flow | For Programs |  |
|  | Review Flow |  |  |
|  | Schedule Panel | Verify Counts appear correct |  |
|  | Run Once/Recurring |  | Press RUN! |

Email Creation Checklist

Marketo provides a [detailed email creation checklist](http://docs.cdn.marketo.com/email_checklist.pdf) for all elements of the email. Let’s summarize the key things to look for when creating an email, especially *cloned* emails.

|  |  |  |
| --- | --- | --- |
| **Done?** | **Action** | **Comments or Additions** |
|  | New or Clone Email |  |
|  | Is this the right template? |  |
|  | Named correctly? |  |
|  | Subject Line | Can be a token |
|  | From Email Address | Can be a token |
|  | Reply To Email Address | Can be a token |
|  | Email Settings: View as Web Page |  |
|  | Email Settings: Publish to Sales Insight | Be careful with this. |
|  | Email Settings: Operational Email | Almost always = False |
|  | Text Version on Each Editable Area? | Usually better to format text offline first. Be sure to press Copy to HTML after any link changes. |
|  | Is the Slug/Salutation Correct? | Watch out for wrong tokens. |
|  | Signature Correct? | Can be token, be careful. |
|  | Footer Correct for this Region? |  |
|  | Is Auto Saved showing after each change? |  |
|  | Copy correct and spell checked? |  |
|  | Send Test (HTML and Text) | Verify links work in each version. |
|  | Links Work? | Do they open as intended? In New Window is best. |
|  | Turn off tracking on MailTo or other links? | Sometimes you need to remove tracking using Class=mktNoTrack on URLs |
|  | Approve Email |  |

Landing Page Checklist

Landing pages have a different set of things to finish.

|  |  |  |
| --- | --- | --- |
| Done? | Action | Comments or Additions |
|  | New or Clone LP |  |
|  | Right Template? | This is ok to change when cloning |
|  | Right Naming Scheme? |  |
|  | URL Slug is SEO | Change this now to use dashes and SEO because Marketo will just use the Program Name+LP Name here. |
|  | Edit Text Elements |  |
|  | Form | Is this the right form? |
|  | Form Thank You Page | Did you insert the correct post registration Page or URL? |
|  | Form Formatting | This can be controlled by STYLE or other scripts. Does it look correct on Preview or Approved? Sometimes Approved pages are better indicators. |
|  | Other Page Elements | Tokens, text, images, etc. |
|  | Do Links work? |  |
|  | Head/Meta Tags | Did you insert the Meta tags as appropriate for SEO purposes and for a clean look to the user? |
|  | Preview |  |
|  | Approve Page | View this page and test it. |
|  | Add Approved Page to appropriate trigger flow. | Remember to add this page as a Fills Out Form Constraint or as appropriate. |

Webinar Checklist

We discussed building a webinar earlier. Marketo and webinar providers also have great checklists for running a stellar event.

|  |  |  |
| --- | --- | --- |
| **Done?** | **Action** | **Comments or Additions** |
|  | Set Webinar Credentials | Should only need to do this once. |
|  | Create Webinar in Webinar Provider | Make sure dates, times, organizers are correct. |
|  | Create/Clone SFDC Campaign | Be sure this is a similar webinar or a new one to avoid progression errors. |
|  | Program Clone/Create | Use a Program Template for repeatable events.  Channel=Event🡪Webinar |
|  | Assign Webinar |  |
|  | Connect to SFDC Campaign |  |
|  | Edit My Tokens | As appropriate |
|  | Update Emails | Invitation, Confirmation if used, others if needed. |
|  | Verify Flows |  |
|  | Verify Smart Lists |  |
|  | Update Landing Page | Verify tokens or change content including Meta Tags |
|  | Approve Landing Page |  |
|  | Update Email and My Tokens with URL |  |
|  | Add Page to Registration Flow |  |
|  | Turn on Registration Flow |  |
|  | Test Registration |  |
|  | Set Invitation Send Schedule | Verify Count appears correctly. |
|  | Watch Registration Counts for errors |  |
|  | Run Webinar, Enjoy! |  |
|  | Wait for Attended refresh data. |  |
|  | Update Thank You Attended & Missed Emails | Text, links to recording, etc. |
|  | Send Thank You Emails | You can use a single Choice Flow Step |
|  | Turn on Attended On Demand Option | optional |

White Paper Download System

With the advent of Programs, setting up a simple download campaign system is easy. I recommend setting up a Program Template for the entire Promotion through Reporting process.

|  |  |  |
| --- | --- | --- |
| Done? | Action | Comments or Additions |
|  | Create Asset | Upload to Images or another site |
|  | Create/Clone SFDC Campaign | Be sure this is a similar webinar or a new one to avoid progression errors. |
|  | Program Clone/Create | Use a Program Template for repeatable events.  Channel=Default🡪Email Blast  (I’d recommend creating a Channel) |
|  | Connect to SFDC Campaign |  |
|  | Edit My Tokens | As appropriate |
|  | Update Emails | Promotion emails and follow ups |
|  | Verify Flows |  |
|  | Verify Smart Lists |  |
|  | Update Landing Page | Verify tokens or change content including Meta Tags |
|  | Approve Landing Page |  |
|  | Update Email and My Tokens with URL |  |
|  | Add Page to Download Flow | This Flow may just Change Progression or it may also send a follow up email with the link. |
|  | Turn on Download Flow |  |
|  | Test Downloads |  |
|  | Set Email Send Schedule | Verify Count appears correctly. |
|  | Watch Registration Counts for errors |  |
|  | Watch counts roll in. |  |
|  | Update Thank You Attended & Missed Emails | Text, links to recording, etc. |
|  | Send Thank You Emails | You can use a single Choice Flow Step |
|  | Reporting |  |

Live Events: Trade Shows and Roadshows

We discussed running these earlier, so here’s a quick and dirty checklist for you. These are the basic components of any good live event. Save the breakfast buffet for me!

Remember: to use the iPad app registration system, you **must** use the Roadshow Channel.

|  |  |  |
| --- | --- | --- |
| **Done?** | **Action** | **Comments or Additions** |
|  | Decide on Event and Date | Work backwards to determine when you need to begin sending invitations. Usually 4 weeks or more is required. |
|  | Confirm Speakers | Do this before you invite anyone. Have backups. |
|  | Confirm Venue, Dates, Locations, Directions | Prepare materials before building any collateral. |
|  | Confirm Topics and Content | Confirm with speakers. |
|  | Decide which items can be tokenized (common elements) | Save time with copy and paste. |
|  | Write Copy |  |
|  | Create/Clone SFDC Campaign | Be sure this is a similar webinar or a new one to avoid progression errors. |
|  | Program Clone/Create | Use a Program Template [LINK] for repeatable events.  Channel=Event🡪Trade Show  Channel=Event🡪Roadshow (iPad) |
|  | Connect to SFDC Campaign |  |
|  | Set Date and Location | This is ***critical***. Registration data will appear in iPad app 7 days before event. |
|  | Edit My Tokens | As appropriate |
|  | Update Emails | Invitation, Confirmation if used, others if needed. |
|  | Verify Flows |  |
|  | Verify Smart Lists |  |
|  | Update Landing Page | Verify tokens or change content including Meta Tags |
|  | Approve Landing Page |  |
|  | Update Email and My Tokens with URL |  |
|  | Add Page to Registration Flow |  |
|  | Activate Registration Flow |  |
|  | Test Registration |  |
|  | Set Invitation Send Schedule | Verify Count appears correctly. |
|  | Watch Registration Counts for errors |  |
|  | Enjoy Your Event! |  |
|  | Wait for Attended refresh data. |  |
|  | Update Thank You Attended & Missed Emails | Text, links to recording, etc. |
|  | Send Thank You Emails | You can use a single Choice Flow Step |
|  | Turn on Attended On Demand Option | *optional* |

Importing a List

Please refer to the Importing a List section for further details, or the Marketo documentation.

|  |  |  |
| --- | --- | --- |
| **Done?** | **Action** | **Comments or Additions** |
|  | Prepare Your Spreadsheet – Save a Copy First as “Working” |  |
|  | Delete unnecessary columns |  |
|  | Rename columns to Marketo names | Exact match required |
|  | Update values to match database | Make sure values like Source or Role match picklist values in your CRM otherwise you end up with junk later. |
|  | Save As CSV file. | This may mean breaking up one file into several csv files. |
|  | Create a List in a Program or Lead Database | Use the right names |
|  | Import List |  |
|  | Step 1: File, CSV, Trusted, Normal | Other options if you know them. |
|  | Step 2: Preview | Map columns correctly or IGNORE some fields. |
|  | Step 3: Import Options | List Name  Revenue Stage (RCM only)  Acquisition Program (for Programs and New Leads only) |
|  | After import, be sure to verify data or update fields as needed. |  |
|  | Run a campaign to Add to SFDC Campaign or update other data. |  |
|  |  |  |

Common Field Names in Marketo

The best way to do this is to download a lead with All Columns and create your own list.

|  |  |  |  |
| --- | --- | --- | --- |
| **Common Column Header Names** | | | |
| Black Listed Cause | Inferred Country | Lead Status | SFDC Account Type |
| City | Inferred Metropolitan Area | Main Phone | SFDC Campaigns |
| Company Name | Inferred Phone Area Code | Marketing Suspended | SFDC Type |
| Company Notes | Inferred Postal Code | Marketing Suspended Cause | SIC Code |
| Country | Inferred State Region | Middle Name | Sales Created Date |
| Created At | Is Anonymous | Mobile Phone Number | Salutation |
| Date of Birth | Is Customer | Number Of Employees | Site |
| Deleted In Sales | Is Partner | Number of Opportunities | State |
| Do Not Call | Job Title | Original Referrer | Total Opportunity Amount |
| Do Not Call Cause | Last Name | Original Search Engine | Total Opportunity Expected Revenue |
| Do Not Call Reason | Lead Notes | Original Search Phrase | Unsubscribed |
| Email Address | Lead Owner Email Address | Original Source Info | Unsubscribed Cause |
| Email Invalid | Lead Owner First Name | Original Source Type | Unsubscribed Reason |
| Email Invalid Cause | Lead Owner Job Title | Parent Company Name | Updated At |
| Fax Number | Lead Owner Last Name | Person Notes | Website |
| First Name | Lead Owner Phone Number | Phone Number |  |

Recommended Resources

Email Design Checklist

https://community.marketo.com/MarketoArticle?id=kA050000000KzRG

http://docs.cdn.marketo.com/email\_checklist.pdf

Live (offline) Event Tutorial

https://community.marketo.com/MarketoTutorial?id=kA250000000Kyqc

iPad Event Instructions

https://community.marketo.com/MarketoArticle?id=kA050000000L5ii

Webinar Event Examples

https://community.marketo.com/MarketoTutorial?id=kA250000000KyrV

Program Event Instructions

https://community.marketo.com/MarketoTutorial?id=kA250000000Kyp5

Event Video

http://micro.marketo.com/demo/university/marketo-creating-events-and-programs/39\_Creating\_Events\_and\_Programs.swf