Marketing Rockstar's Guide to Automation

Chapter 1. Appendix III – Checklists

At a Glance

Overview

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 though, 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.

Marketing Automation Setup Checklist

Here is a checklist for those of you considering installing automation at your firm. It's a fun project, but prepare in advance to save time and money. It is better to sign the contract closer to your intended launch date assuming you are ready for each of these setup tasks.

Done?	Action to Take	Notes
	Decide on a lead management process.	The entire lead funnel, including types of metrics you want.
	Conduct a lead scoring survey with Sales	See the lead scoring chapter.
	Implement changes in Salesforce	Use the sandboxes if you can
	Setup an Automation User in SFDC	
	Determine who will have access to what inside the system.	Setup Users & Roles
	CNAME Choice and Setup	Required.
	Add Munchkin code to your website.	
	Email CNAME Choice and Setup	
	SPF and DKIM Setup on DNS Record	Required
	Webinar Integration	
	Data.com Integration	
	SFDC Sync Setup	Turn it on!
	Verify data is flowing.	
	Install Sales Insight from AppExchange	

	Decide on a naming and organizing structure	
	Setup Lead Scoring flows	

Campaign Checklist

Before sending out that email blast to 100,000 people worldwide, you might take a moment to verify your campaign will send or react accordingly.

Done?	Action to Take	Notes
	Create Campaign with correct naming scheme	Like `20121203 Big Birthday Blast`
	Are the smart list filters correct?	
	If you are using a Trigger, did you verify other constraints are Any, All, or Advanced?	Any trigger will turn on the campaign, unless the green filters disagree.
	Review the flow actions.	
	Is the correct email or page listed?	Verify with the preview button.
	Did you test the email several times?	Watch out for misspellings or token issues.
	Is the subject line correct?	
	Is the registration link correct?	
	Is the Page Approved and Live?	
	If there's a form, is there a listen campaign to do something with that form?	
	Schedule: is this sent once, many times to each lead?	
	Schedule: is this going out at the right time?	I recommend postponing even immediate campaigns by 10 minutes to avoid last minute problems.
	Does the count seem correct to you?	You can click on the number to review.
	Listen/Active Campaigns: did you press Activate?	

Email Creation Checklist

Marketo provides a detailed email creation checklist for all elements of the email. Let's summarize the key things to look for when creating an email, especially *cloned* emails.

Done?	Action to Take	Notes
	New or Clone Email	Design Studio or Program
	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	

Other Resources

Email Design Checklist

Email Design Checklist [PDF]

Landing Page Checklist

Landing Pages are a bit different and have their own checklist.

Done?	Action to Take	Notes
	New or Clone LP	Design Studio or Program
	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 how to run webinars in an earlier chapter. Most automation providers and webinar providers also have great checklists for running a stellar event.

Done?	Action to Take	Notes
	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

Additional Checklist Ideas

Running a Webinar [Spear Marketing]

Webinar Invitation Ideas [Spear Marketing]

7 Mistakes to Avoid in Your Webinar Invitation [Spear Marketing]

Science of Webinars [HubSpot]

Marketo Webinar Instructions [Marketo]

Webinar Event Examples

Program Event Instructions

Event Video

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 to Take	Notes
	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	Optional

Other Resources

IPad Event Instructions

Live (offline) Event Tutorial

Whitepaper 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 to Take	Notes
	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	You may want a Whitepaper or Asset Download Program Channel: -Sent -Opened -Viewed Page -Form Fill Out -Downloaded
	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	

Importing a List

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

Done?	Action to Take	Notes
	Prepare Your Spreadsheet – Save a Copy First as "Working"	
	Delete unnecessary columns	
	Rename columns to the correct Automation System names	Exact match required
	Update values to match database	Make sure values like Source or Role match pick list 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

To create this list for your own system, take the following steps:

Step 1: Go to Lead Database

Step 2: Search for a single lead

Step 3: Press Export > All Columns

Here is a list of typical field names, which you can use as headers in your import spreadsheets. Please use this list carefully as it may not match your system.

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	