

Additional Tips and Tricks

Multiple Brand Subscription Management

Generally you can do this using the steps above to create the appropriate brand or business unit fields in Marketo. If you use Segmentations and Snippets, you should be able to adjust an email's footer very easily.

There is an <u>alternative method</u> which Marketo suggested at one point.

Opt In Methods

As described in Marketo's "<u>Don't Let them Unsubscribe Webinar</u>", you have two Opt In methods: Single and Double. Marketo recommends using the Double, which many pro-bloggers do to ensure they have only the most engaged audience.

Single Opt In

The Single opt-in method is the easiest to implement and likely covers all legal requirements. If a lead submits your form with the opt-in checked to Yes, that is a single step opt in. The drawback is a lead may have mistyped the email, causing you to have higher bounces, or they may not personally have entered the form, leading them to unsubscribe or spam filter you later.

Double Opt-In

The <u>double opt-in method</u> sends a confirmation email and confirmation link step to the lead after the first step:

- 1. Lead submits preferences form (Single Opt In)
- 2. Marketo sends an email with a confirmation link to the address provided.
- 3. The lead clicks on the link, confirming they've received the email successfully and confirms their preferences.
- 4. You now know you have a confirmed and active email address.

The steps below assume you made a simple CTA to sign up for a newsletter, requiring a single field change. You could also do this with the multiple subscriptions, however, you will only confirm the change, rather than adjust fields.

This process assumes that new leads start out with Unsubscribed = True until they have taken an action to change their preference.

Step 2: Create a Confirmation Email

Call this Double Opt In Confirmation Email

You will place one or two links:

Link 1: Confirmation Link to Page in Step 2.

Link 2: Unsubscribe Link to the Unsubscribe Page.

🗈 New Email	
New Email Name:	* Double Opt In Confirmation Email
Description:	
Email Template:	* Curved Paper - MRG
	✓ Operational Email (Bypass Unsubscribe / Marketing Suspended) Warning: You have chosen to ignore unsubscribe settings. Use only for situations where the recipient cannot consider the email as unsolicited commercial email (SPAM). Learn more about anti-SPAM Laws
	☑ Open Email editor for new email
	Create Cancel

Because the person is expecting our confirmation email as part of the process, you should set this to Operational Email.

Step 3: Create a Confirmation Landing Page

Call this in Marketo: Double Opt In Confirmation Page

URL Slug: confirmation-of-subscription

Marketo La	nding Page Designer Double Opt In Confirmation Page		uto-saved:	Jan 16, 11:58 AM EST	🔎 Preview Draft (🧿
		Property Sheet outerWrap	Div 🛛 😵	Landing Page Actio	ns 🔻 📄 Grid
				Insert Elements	
	Subscription Confirmed!			Rich Text Image	Rectangle Form
	Thank you for subscribing to our Newsletter. Expect to receive it every Friday around 11:00am EST.	You could also insert {{lead.Er Address}} to confirm the email involved.	nail	Social HTML	Snippet
	_			Page Elements	
				Rich Text 2	
				Template Elements	
				BODY#bodyId	
				DIV#outerWrapDiv	
				DIV#mktHeader	
				DIV#mktColumn	
				DIV#mktFooter	

Step 4: Create an Unsubscribed Landing Page This will be a second link in the email.

Call this in Marketo: Double Opt In Unsubscribe Page

URL Slug: unsubscribe-from-email



Step 5: Update the email with the appropriate links.

The email is operational, so you could consider using a generic email address like

From Name: My Company

From Address: donotreply-confirmations@mycompany.com

I Marketo Email I	Designer	Double Opt In Confirmation Email Auto-saved	d: Jan 16, 12:04 PM EST 🛛 🎾 Preview Draft 📀
Version: HTML 🔻 📑 Email	Actions 🔻	Show Edits 📑 Edit Settings	1
From Name:	* Josh Hill		Insert Elements
From Email:	 marketo.guid 	de@jdavidhill.com	
Reply-to:	 marketo.guid 	de@jdavidhill.com	
Subject:	* Please confir	m your subscription by clicking the link	Token Image/File
			Email Content
			Segment By
		Subscription is nearly confirmed Double Opt In: Hello {{lead.First Name:default=Sir/Maddam}}, Thank you for signing up for our Newsletter. Please confirm your subscription by clicking this link below: Yes, Please Confirm my Subscription to Your Awesome Newsletter. If you received this email in error, please ignore it or click below: No! I don't want your Newsletter. Thanks and see you around.	Static Subject From Name From Come Email Reply to ovolume_title main_title main_title main_text mic

Step 6: Create a New Campaign to Send the Confirmation Email Call this Send Double Opt In Email

Smart List: Fills Out Form IS "Subscription Management Form" on Web Page "Subscription Management"

Send Double	Opt In Email	Smart List	Flow	Schedule	Results	
🗊 New 🔻 💡 Ca	ampaign Actions 🔻	🖓 View Camp	aign Member	5		
🎾 Use ALL f	ilters 🔻 📔 📥 Collar	ose All 🔻 Expand .	All			
🗭 Fills Out	Form					
						SAdd Constraint V
Form Name:	is		Y Sub	scription Manage	ement - Dev	⊖ ~
Web Page:	is		Subsc	ription Managem	nent 🤅) 📉 🔣 🔛

Flow: Send Email "Double Opt in Confirmation Email"

Send Double Opt In Email	Smart List	Flow	Schedule	Results	
🗊 New 🔻 💡 Campaign Actions 🔻	🖓 View Campa	aign Members	3		
▲ Collapse All 🗢 Expand All					
I - Send Email					▲ ×
					Add Choice
Email: Double Opt In Co	onfirmation Email				<u>~</u>

Schedule: Trigger Activate Every Time

Step 7: Create a New Campaign to Capture Confirmations

This campaign will listen for the Clicks Link in Email activity so Marketo knows the Lead has confirmed their subscription.

Call it Double Opt In Capture Flow

Smart List: Clicks in Link Email

Double Opt In Capture Flow	Smart List	Flow	Schedule	Results		
🗊 New 🔻 💡 Campaign Actions 🔻	🐉 View Campaig	n Members				
🎾 Use ALL filters 🔻 🔺 Collapse	All 🔻 Expand All					
💋 Clicks Link in Email						
					SAdd Constraint 🔻	This URL will
Email: is		Double	e Opt In Confirm	ation Email	<u>~ 3</u>	appear if the
Link: is		~ http:	://na-f.marketo.c	om/lp/mktodem		Email was Approved.

Flow: Change Data Value to the opted-in value. Choose the field(s) appropriate for your system.

Double Opt In Capture Flow	Smart List	Flow	Schedule	Results	
🗊 New 🔻 🂡 Campaign Actions 🔻	🦓 View Campaig	n Members			
△ Collapse All 🔻 Expand All					
1 - Change Data Value					
Lorent Joseph					- Add Choice
Attribute: Unsubscribed		New \	/alue: false	~	

Schedule: Triggered Activate: Run Every Time.

Step 8: Create a New Campaign to Capture Unsubscribers

You will also give people the option to actively unsubscribe from the Double Opt In Email. This campaign will capture that action as well.

Call it Double Opt In - Capture Unsubscribed Link Flow

Smart List: Fills Out Form

Be sure to select the *unsubscribe link!*

Double Opt In - Capture Unsubscribed	Smart List	Flow S	Schedule	Results	
🗊 New 🔻 💡 Campaign Actions 🔻 🛛 🦓 View Car	mpaign Members				
Dise ALL filters 🔻 🛆 Collapse All 🔍 Expan	nd All				
Clicks Link in Email					
				Ndd Con	straint 🔻
Email: is	M Double Opt	t In Confirmatio	n Email 🕒	- 4	
Link: is	Mttp://na	-f.marketo.com	/lp/mktoder 🄇) 🗠 🖸	

Flow: Change Data Value – since they unsubscribed or ignored our request, they get set to Opted Out.

Double Opt In - Capture Unsubscribed	Smart List	Flow	Schedule	Results	
🗊 New 🔻 💡 Campaign Actions 🔻 🛛 🦓 View Camp	baign Members				
△ Collapse All V Expand All					
1 - Change Data Value					
				n 🔤 🖂	d Choice
Attribute: Unsubscribed	✓ New Value	e: true	~		

Schedule: Triggered Activate: Run Every Time.

Customizing Your Email Footer

A common Marketo question is "How do I modify the unsubscribe footer?" There are three main ways to manage your footer options to comply with the law, your contract, and to help your leads. The options are: Admin>Email Settings; Snippets or Segmentations; or Multiple Templates.

Admin > Email Settings

This is easily done through Admin>Email. You, or a Marketo Admin, should be very careful with these modifications as they are immediate once you press Save. I recommend taking the following steps.

Step 1: Decide on the layout for the html and text

Type these in one file or have your designer help you with the html. Remember the text must say something like: