

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 [alternative method](#) which Marketo suggested at one point.

Opt In Methods

As described in Marketo's "[Don't Let them Unsubscribe Webinar](#)", 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 [double opt-in method](#) 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.

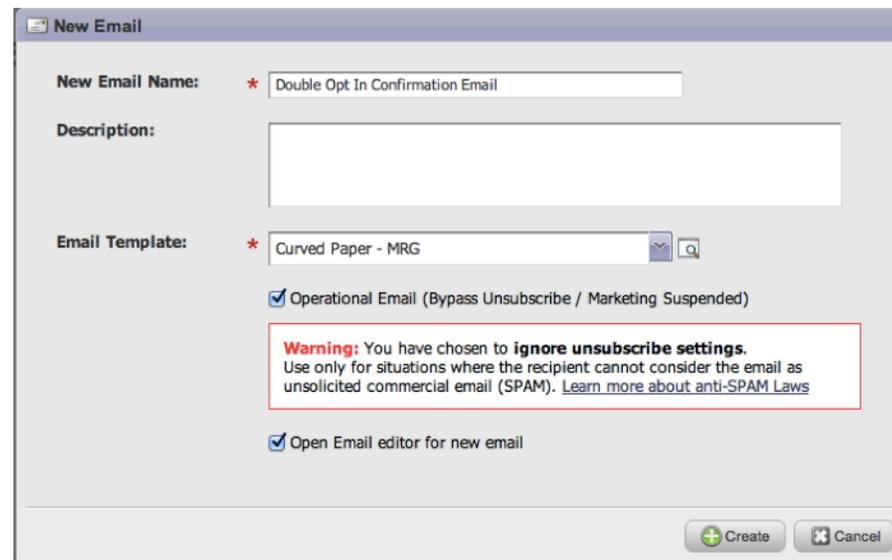
Step 2: Create a Confirmation Email

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.



The screenshot shows the 'New Email' configuration interface in Marketo. The form includes the following fields and options:

- New Email Name:** * Double Opt In Confirmation Email
- Description:** (Empty text area)
- 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

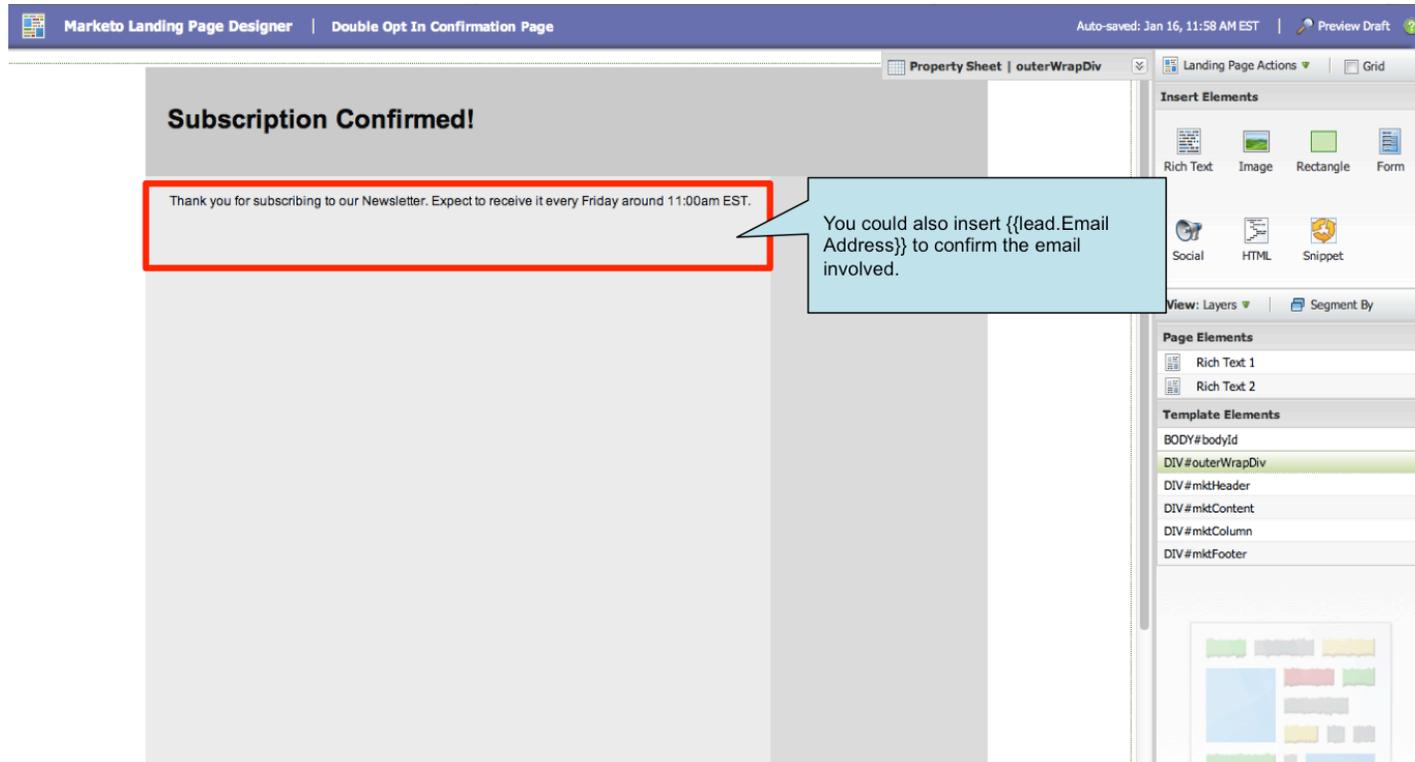
At the bottom right, there are two buttons: '+ Create' and 'X Cancel'.

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

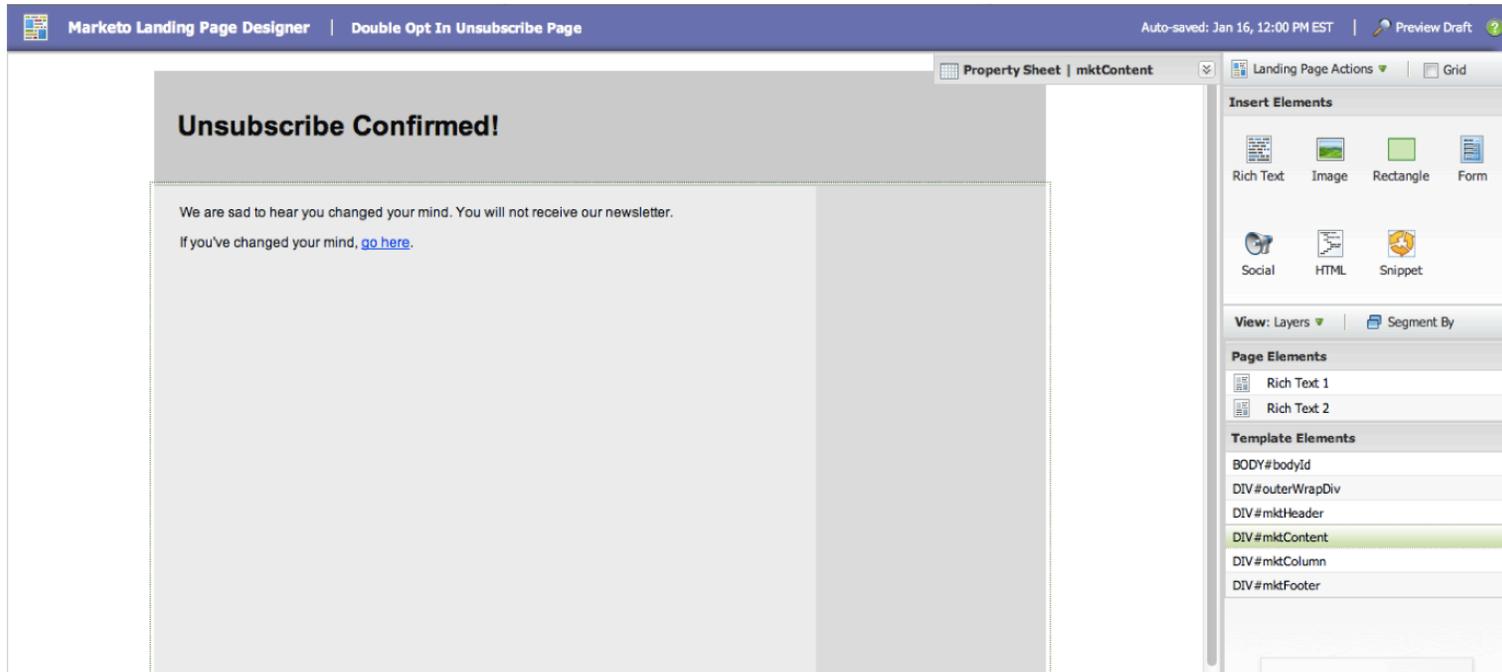


Step 4: Create an Unsubscribed Landing Page

This will be a second link in the email.

Call this in Marketo: Double Opt In Unsubscribe Page

URL Slug: unsubscribe-from-email

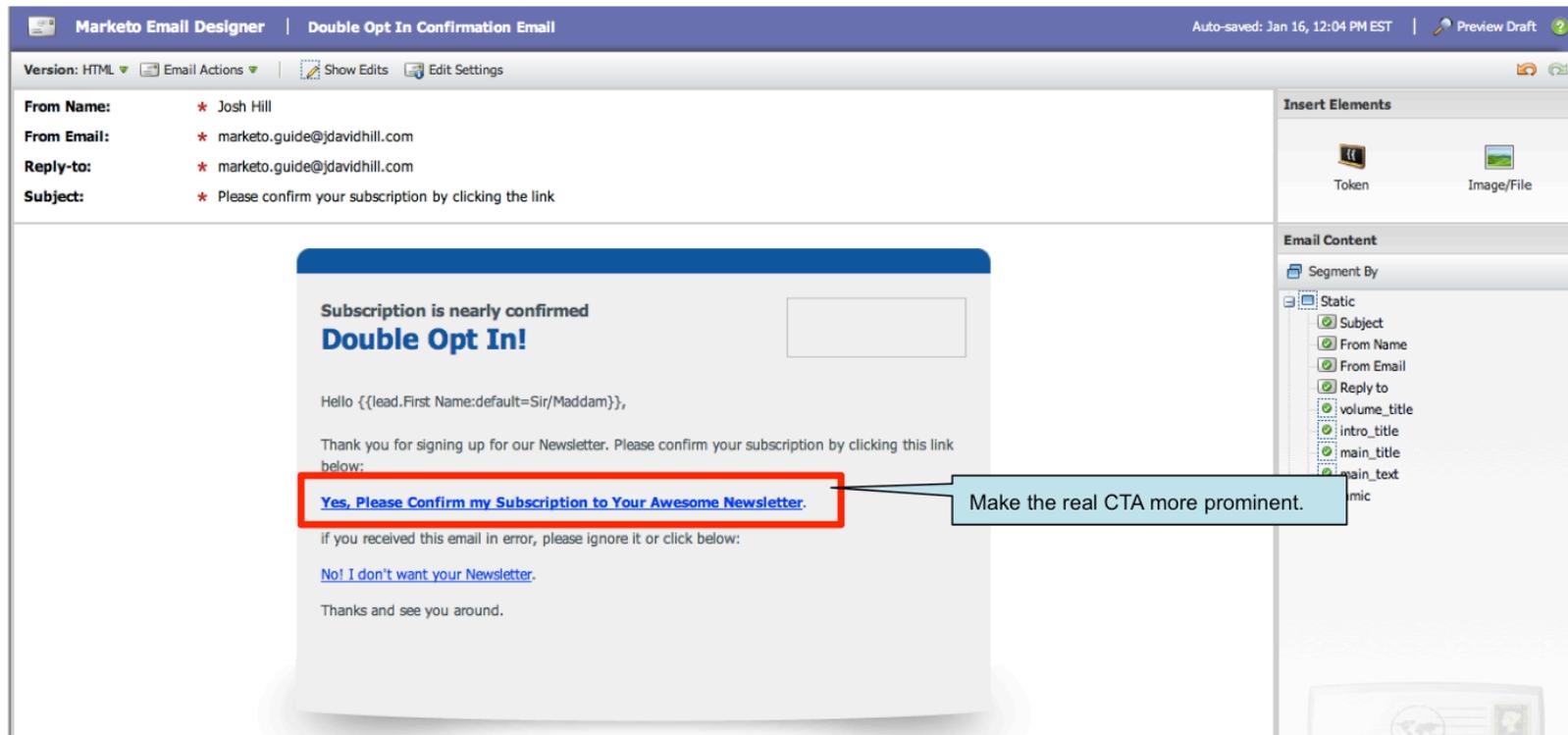


Step 5: Update the email with the appropriate links.

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

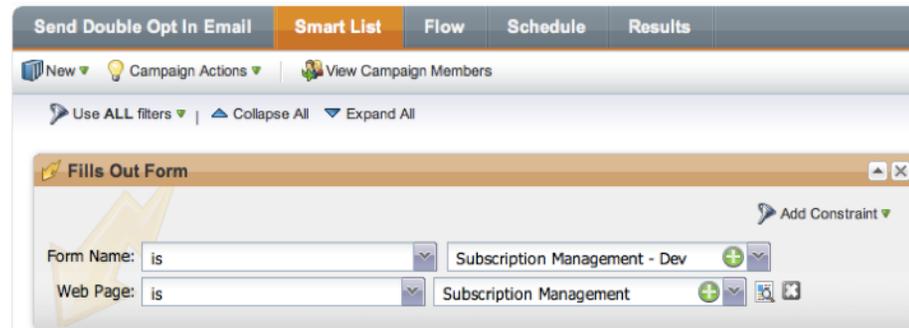
From Name: My Company

From Address: donotreply-confirmations@mycompany.com

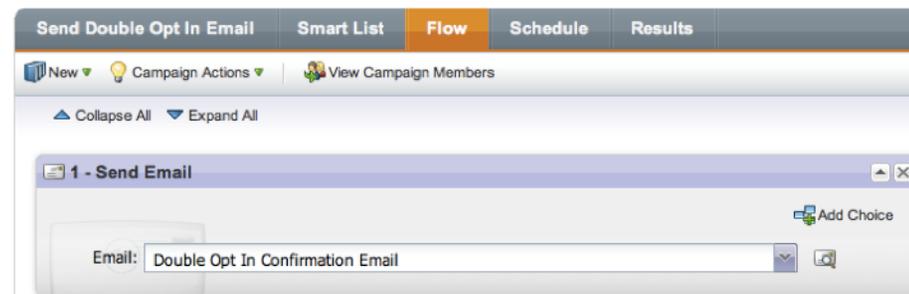


Step 6: Create a New Campaign to Send the Confirmation Email
Call this Send Double Opt In Email

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



Flow: Send Email "Double Opt in Confirmation Email"



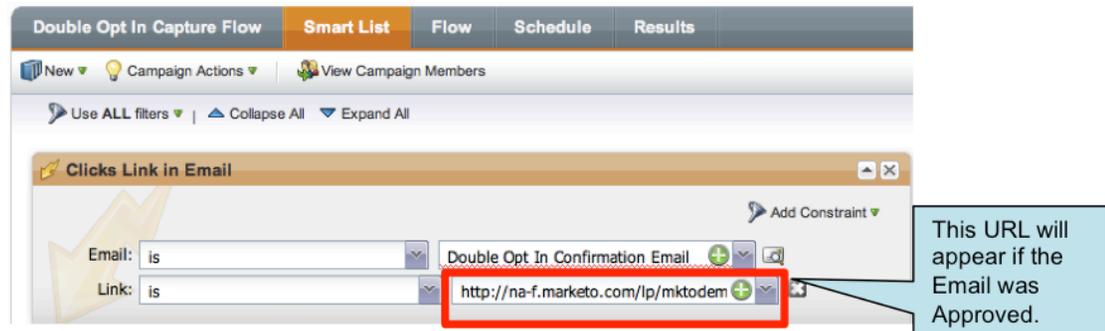
Schedule: Trigger Activate Every Time

Step 7: Create a New Campaign to Capture Confirmations

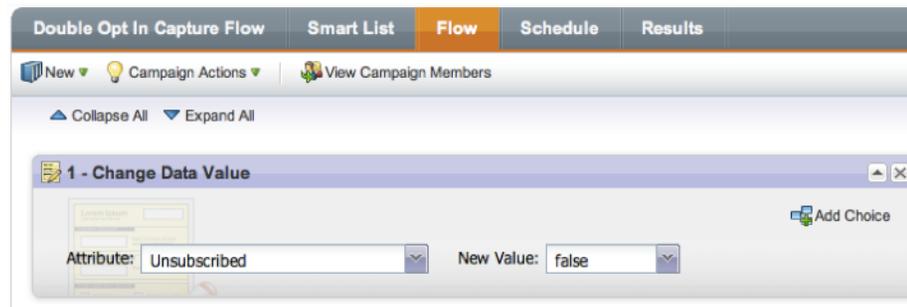
This campaign will listen for the Clicks Link in Email activity so Marketo knows the Lead has confirmed their subscription.

Call it Double Opt In Capture Flow

Smart List: Clicks in Link Email



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



Schedule: Triggered Activate: Run Every Time.

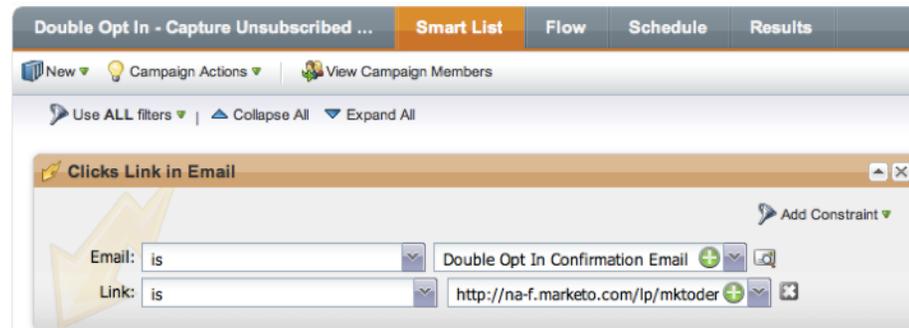
Step 8: Create a New Campaign to Capture Unsubscribers

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

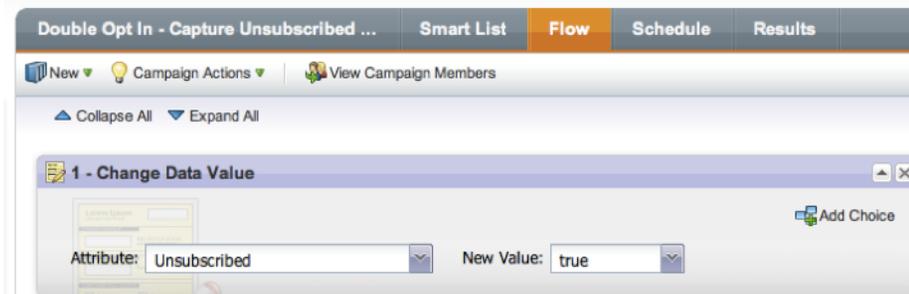
Call it Double Opt In – Capture Unsubscribed Link Flow

Smart List: Fills Out Form

Be sure to select the *unsubscribe link!*



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



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: