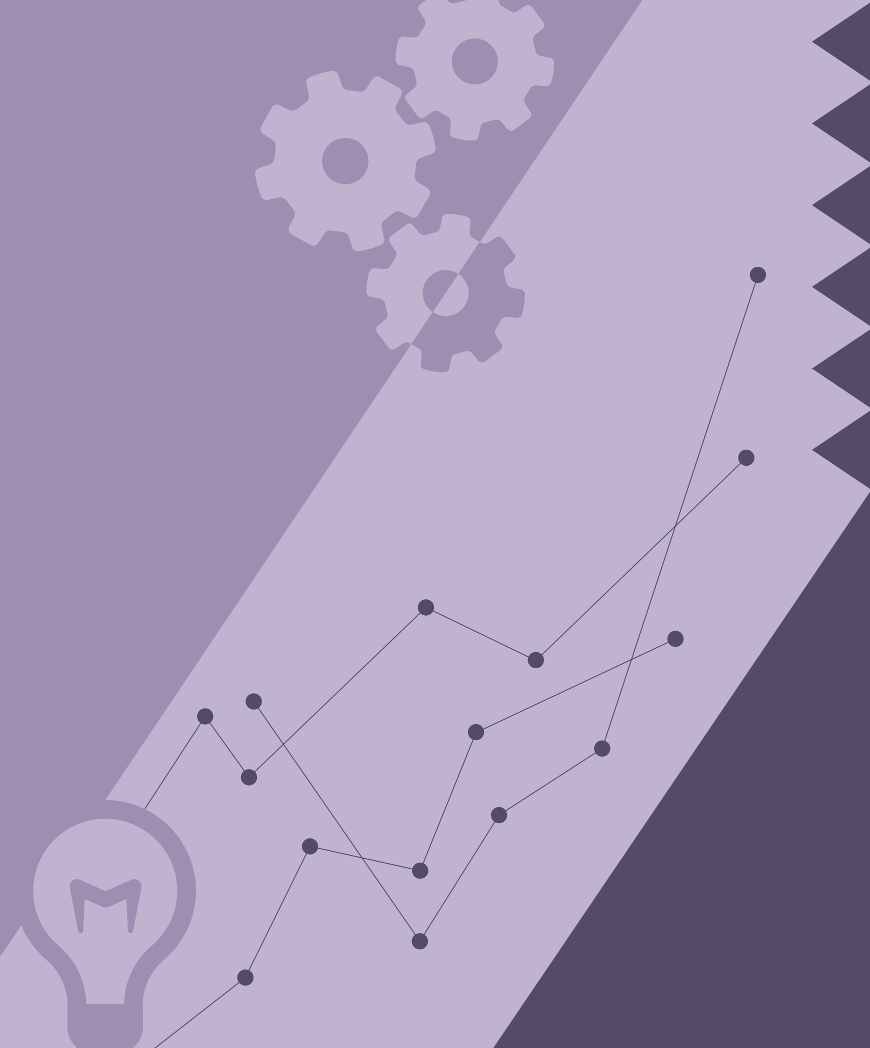
MARKETING ROCKSTAR'S

Guide to Marketo

Learn How to Use Marketo Effectively from *Day 1*

JOSH HILL



Sales Insight Training for Sales

Note: this section is for Salespeople. You may purchase additional copies for your MSI Training Day.

How Do I Make Money from this?

Sales reps will ask this question before they tune MSI out. Salespeople want to focus on sales and not spend time on new systems. Great sales reps, however, will spend time preparing for calls using the best intelligence they can. Sales Insight is their intelligence tool.

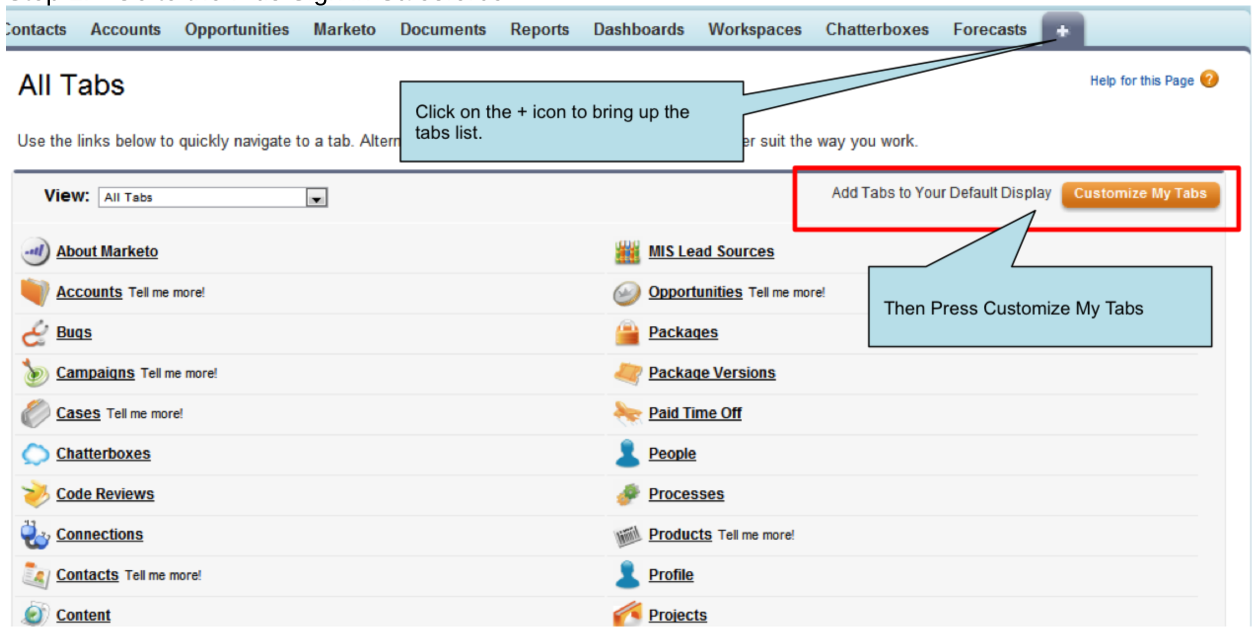
Sales Insight provides more visibility into the behaviors of people on your Site, your Emails, and your Events. Certain behaviors indicate the Lead is starting, engaging, or closing the Buying Process. Use the information MSI provides to help prepare for Sales calls:

- Ask better questions.
- Ask relevant questions earlier to demonstrate understanding of their needs.
- Know when to call.
- Know when not to call.
- Spot potential RFP activity early using Activity, Anonymous Web Activity.
- Use Anonymous Web Activity to prospect and call Leads before our competitors.

Adding the Sales Insight Tab

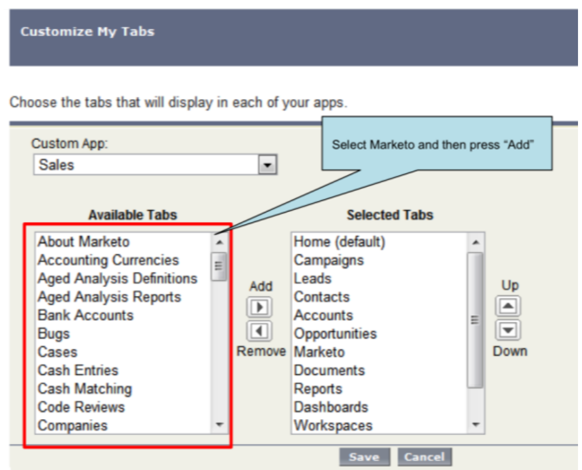
If you don't see it already, you will need to add the Marketo Tab to your Salesforce tabs at the top of the screen. You must do this to see all the great tools Marketo Sales Insight (MSI) offers.

Step 1: Go to the Plus Sign in Salesforce



Step 2: Select the "Marketo" tab to the Selected Tabs box

Watch out! There are sometimes 3 Marketo tab options. You want the one that just says Marketo.

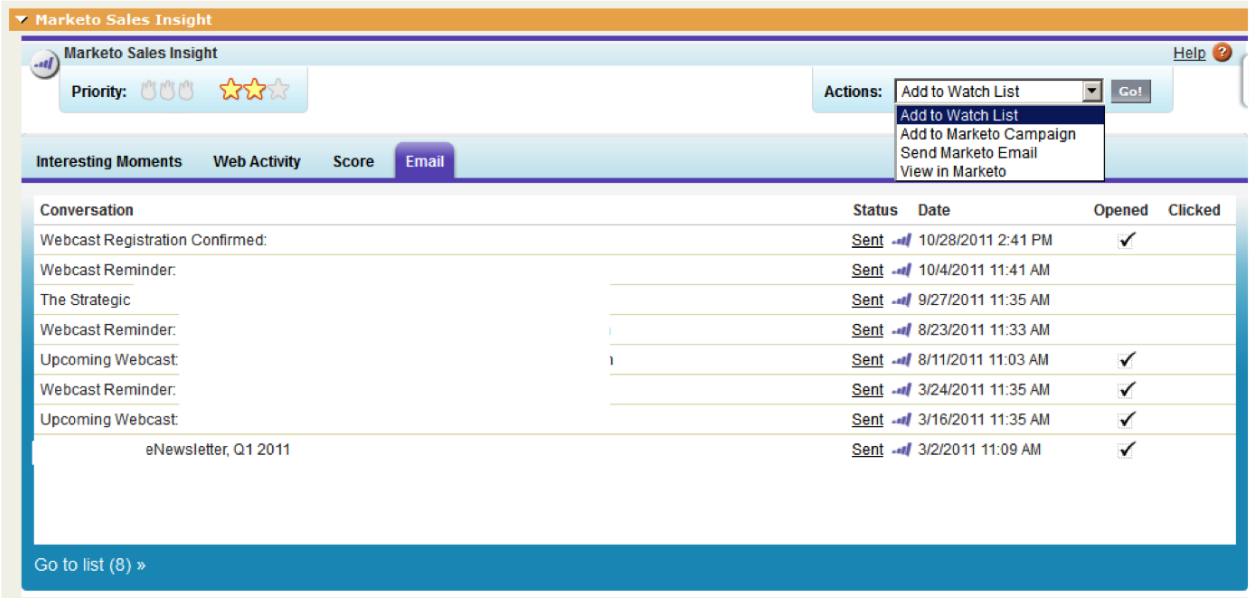


Sales Insight on Lead Records: Knowledge is Revenue

Marketo and MSI add tremendous detail about a Lead's activity and show this data directly on the Salesforce record. The data is shown for Leads and for Contacts. Sometimes this data also appears on Account and Opportunity records depending on your system's setup. This is valuable data on how your Lead is engaging with your firm and your firm's website.

For instance, you can see which pages a Lead is visiting. Is it a product page? A webinar? The Career page? Did they already see a demo or have they been missing for the last 6 months? With Marketo you know *before* you call so you can focus the discussion quickly.

Marketo Sales Insight record section has four tabs:



Tab	What is this?	What it Means for Sales
Interesting Moments	Key events in the person's marketing history like watching a demo.	These details tell you what Forms, White Papers, Webinars, and Special Web Pages the Lead visited. Know why you're calling.

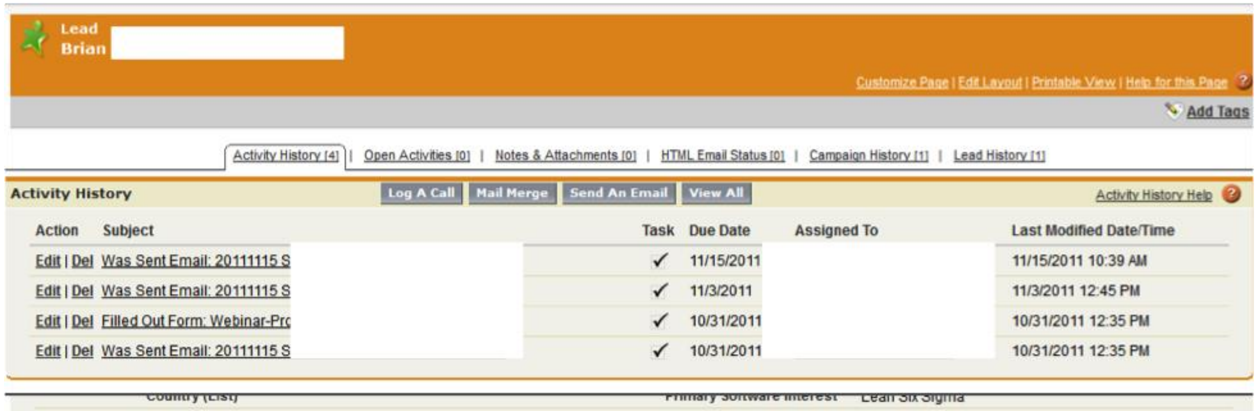
Tab	What is this?	What it Means for Sales
Web Activity	Web pages visited with timestamp and search terms used.	What is the lead searching for? Can you add to the conversation?
Score	The complete scoring history for this person.	Scoring helps you prioritize Leads for Contact. The tab shows why and how the Score changed.
Email	Opens and clicks for all emails sent through Marketo.	Marketing and Marketo email history shows how the Lead reacted to our emails. Sent-nothing. Opened: we know they may have read it. Clicked: they were motivated to come to our site.

Best Practice: Interesting Moments provide the most detail on actions taken by the Lead.

Activity History

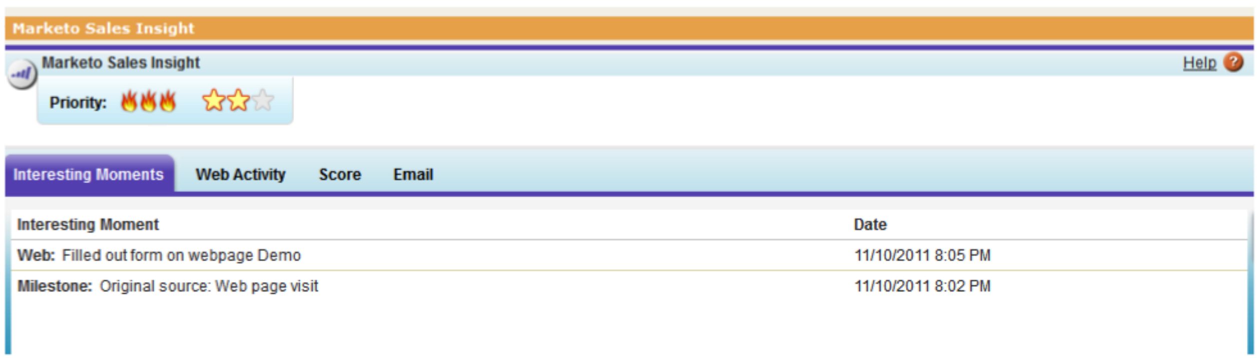
You may already be familiar with the Activity and Tasks in Salesforce. Marketo may also attach Activities here as well. If your Marketo is setup to do so, you may find Activity History helps you track the kinds of emails Marketing has been sending out.

Activity Name	What is this?	What it Means for Sales
Sent Email	System or Person sent an email.	A reminder of the kinds of emails being sent by Marketing
Opened Email	Lead Opened an Email	Not all email clients will report this.
Clicked Link	Lead clicked on a link	High engagement.
Sent Sales Email	Lead was Sent an email via Sales Insight.	An automatic note of what you sent the Lead.
Opened Sales Email	The Lead opened your Sales Email	Success! They've paid attention to you. Now what?



Interesting Moments

These are setup by Marketo to automatically inform you of specific actions indicative of a possible buyer. Your team will tell you more about your firm's specific Interesting Moments. In the meantime, here are a few common scenarios.

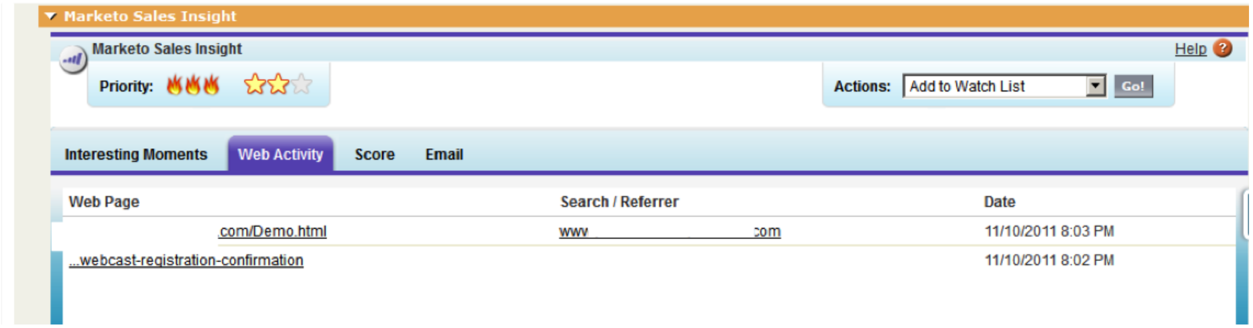


Interesting Moments	What is this?	What it Means for Sales
Fills Out Form	The lead filled out any form on our site.	The lead is engaging to learn more about something. The Form Name and Web Page will be included for you.

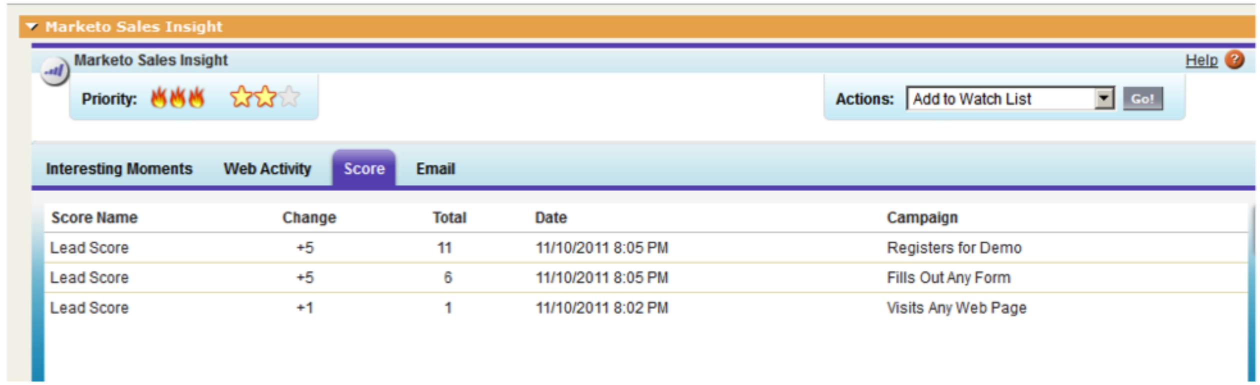
Interesting Moments	What is this?	What it Means for Sales
Viewed IT Recorded Demo	Lead filled out the Demo request form and viewed the Demo page.	Lead is looking at our solution and may be more engaged.
Heavy recent Web Activity	If the Lead was on 7 or more pages in a 7 day period, this will appear.	Perhaps the lead is actively reviewing our content and products. A list should appear under Web Activity.
Opened Sales Email	The Lead Opened an Email we sent them.	The Lead may be engaged.
Submitted Web Contact Inquiry	Lead sent an inquiry via the main Contact Us page.	Usually a more engaged lead looking for an RFP. Leads posted via Marketing.
Unsubscribed	Lead has opted out of all emails.	This is a negative engagement where we can no longer email them.

Web Activity

This is a list of web pages, which the Lead visited, including the Date and the previous Page or Search Terms used. Displays important web pages visited by the Lead. Usually these are Demo, Pricing, or Trial pages.



Lead Score



Sales and Marketing likely worked together to create a ranking system to help you focus on the Leads most ready to buy. Lead Scores appear in a number of places on a record in Salesforce. You may see a Lead Score field with a number like 83, Stars, Flames, and more. The Lead Score tab in the Marketo section is a bit different because it shows you more.

- **Lead Scoring** history: what caused the change in score? This information can help too.
- **Flames**: this lead is HOT if their score went up rapidly.
- **Stars**: this lead is in your target market vs. other leads.

Take a look at the Priority field, at the top of the Marketo Sales Insight section. Priority of a lead is based on Lead Score – a measure of the person's interest in our offers; the higher the lead score, the more likely this person is interested in our products.

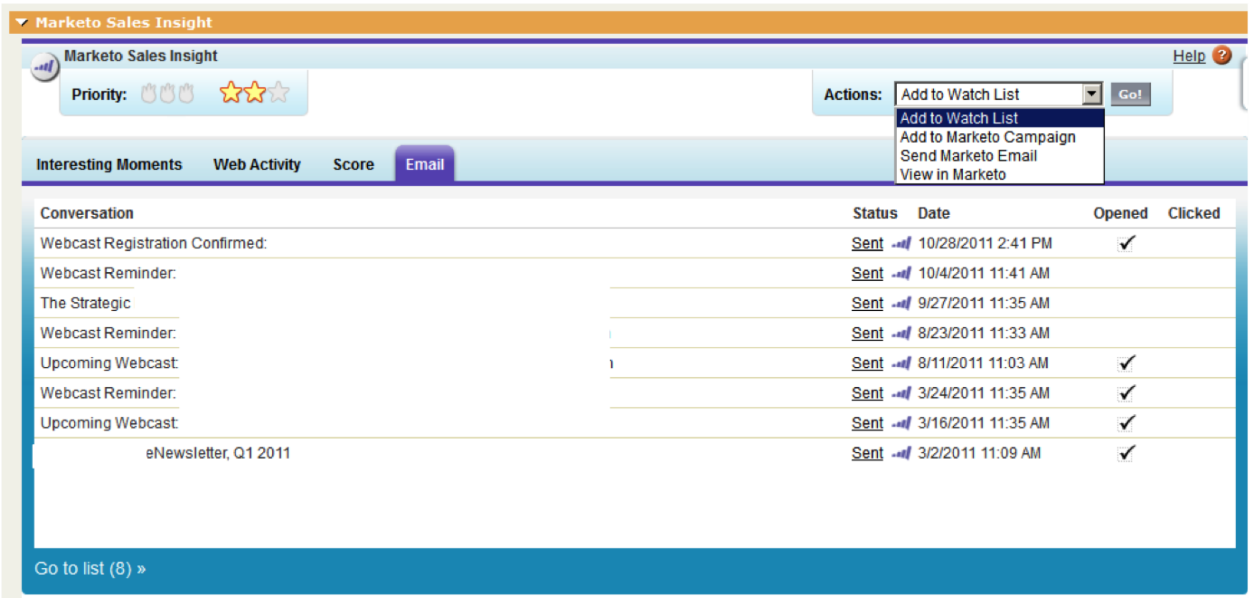
Priority is represented by a combination of flames and can be viewed for each lead or contact. This information can help you size up and prioritize leads and contacts. Here's how it works:

-  **Flames represent urgency** – big, recent jumps in score. Multiple flames mean that this lead is hot; you should call this contact right away. Fewer flames represent that this lead has shown a lower level of interest lately.
-  **Stars** represent relative score – how this individual's lead score compares to other leads. Three stars represents that this lead has shown a higher level of interest in our services compared to a lead with one star.

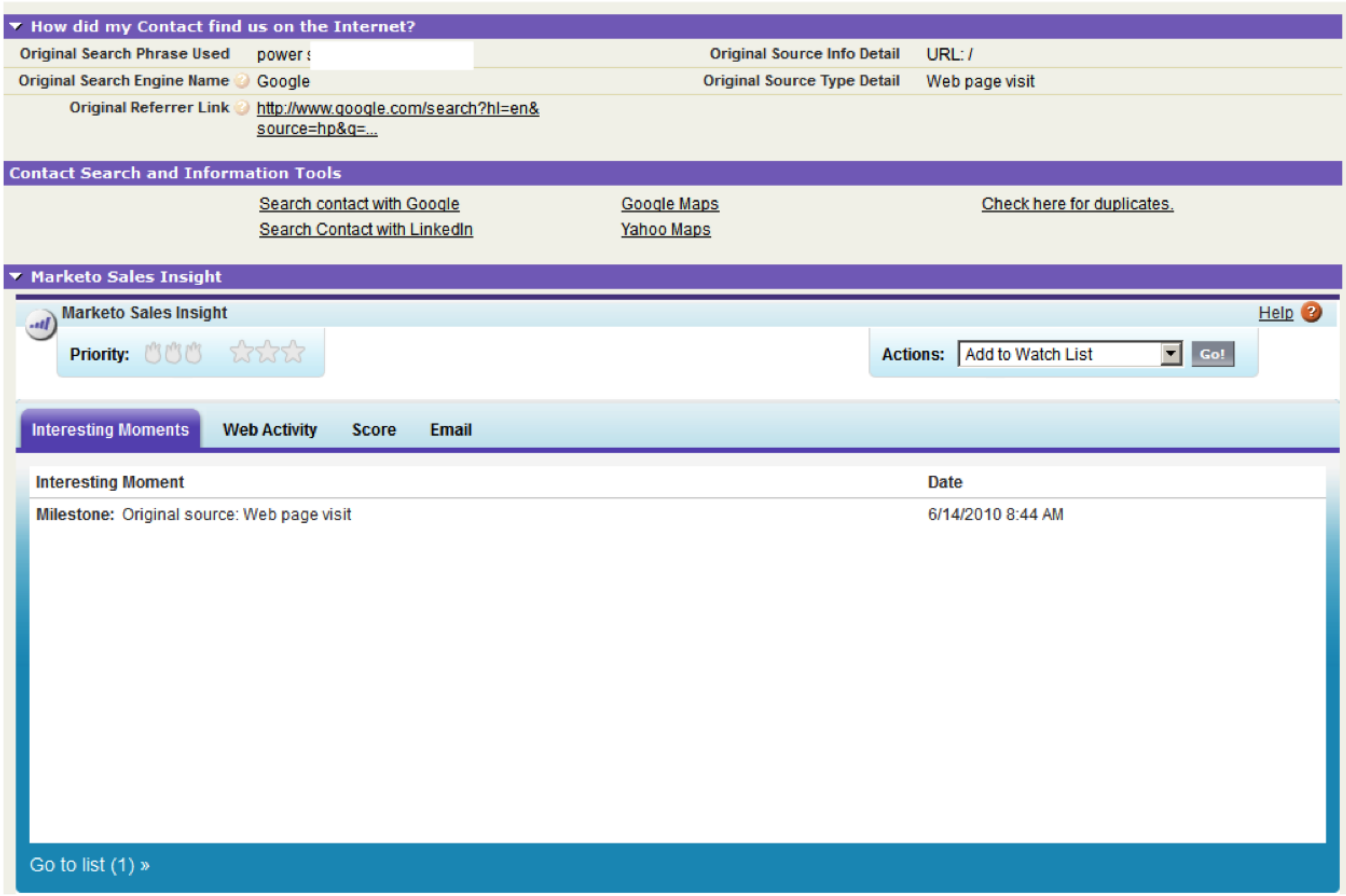
The two scores combine to make a Priority, and you'll see this field on all leads and contacts. Use it to quickly size up leads and contacts so you can pick whom to target.

Email

What sort of communications have we sent? If the Lead Opened or Clicked on an email, that indicates a higher level of engagement for that topic. Be sure to note the emails or topics that appear to be relevant. Craft your call, email, or conversation to discuss those topics.



Sales Insight also resides within each main record type to provide details to help you sell, including Leads, Contacts, Accounts, and Opportunities. Sales Insight looks similar on each record.



The Marketo Tab

This is the Salesperson's dream dashboard – all the lead information in one place, prioritized, and easily monitored. This tab covers *your* territory or owned leads in one spot, rather than having to look at lead after lead.

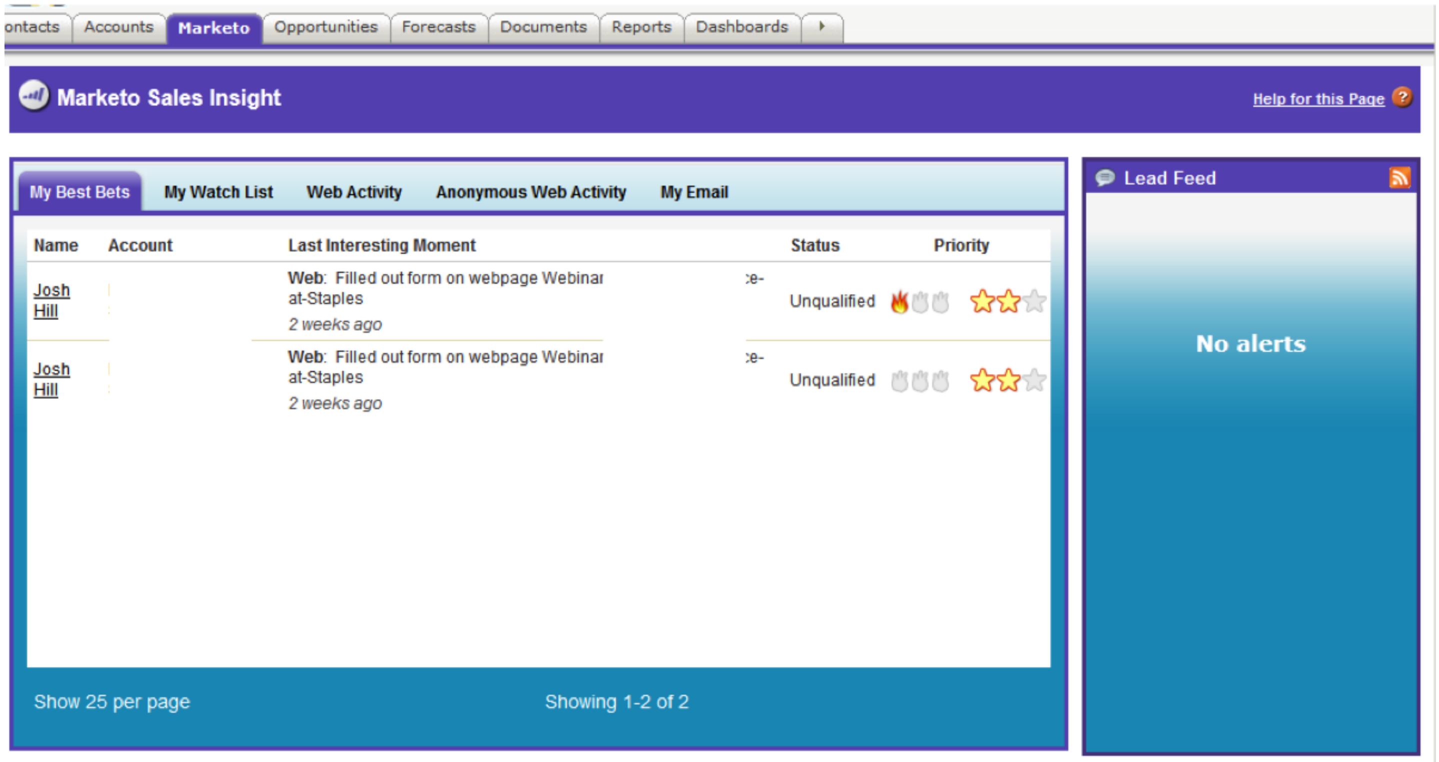
Marketo Dash	What is this?	What it Means for Sales
My Best Bets	Your top priority leads sorted by relative score and urgency.	**RECOMMENDED**! Marketo flags high scoring and urgent leads based on their activity and engagement with us.
My Watch List	Leads you've bookmarked for quick viewing.	Show the last interesting moments and scores for Leads you are monitoring. For instance, call a Lead right after they download a key whitepaper you know is an indicator to buy.
Web Activity	Best Bets and Watch List people who visited your company's website.	See a list of recent activity for Leads you own.
Anonymous Web Activity	People who visited your website but didn't provide contact information.	Monitor activity of companies on our site. Use this to call stale leads at that company if there is a change in their visits to our site.
My Email	Track Marketo emails sent to your leads and contacts.	See if a Lead Opened or Clicked on an Email you sent via Marketo. Then call or follow up appropriately.
Lead Feed (RSS) (if enabled)	The most recent Interesting Moments done by your leads and contacts.	Updated feed of your owned Leads. You can subscribe to a specific Lead's feed or the whole Feed and have it on Google Reader when on the go. Use it to monitor targets and make a call at the right moment.

To get to the Marketo dashboard, click on the Marketo tab in Salesforce.

My Best Bets

Using the Best Bets section on a daily basis will help you prioritize and monitor leads that are more engaged than others. Engaged leads are more likely to go through the sales process, which leads to Won Opportunities, which leads to closed sales.

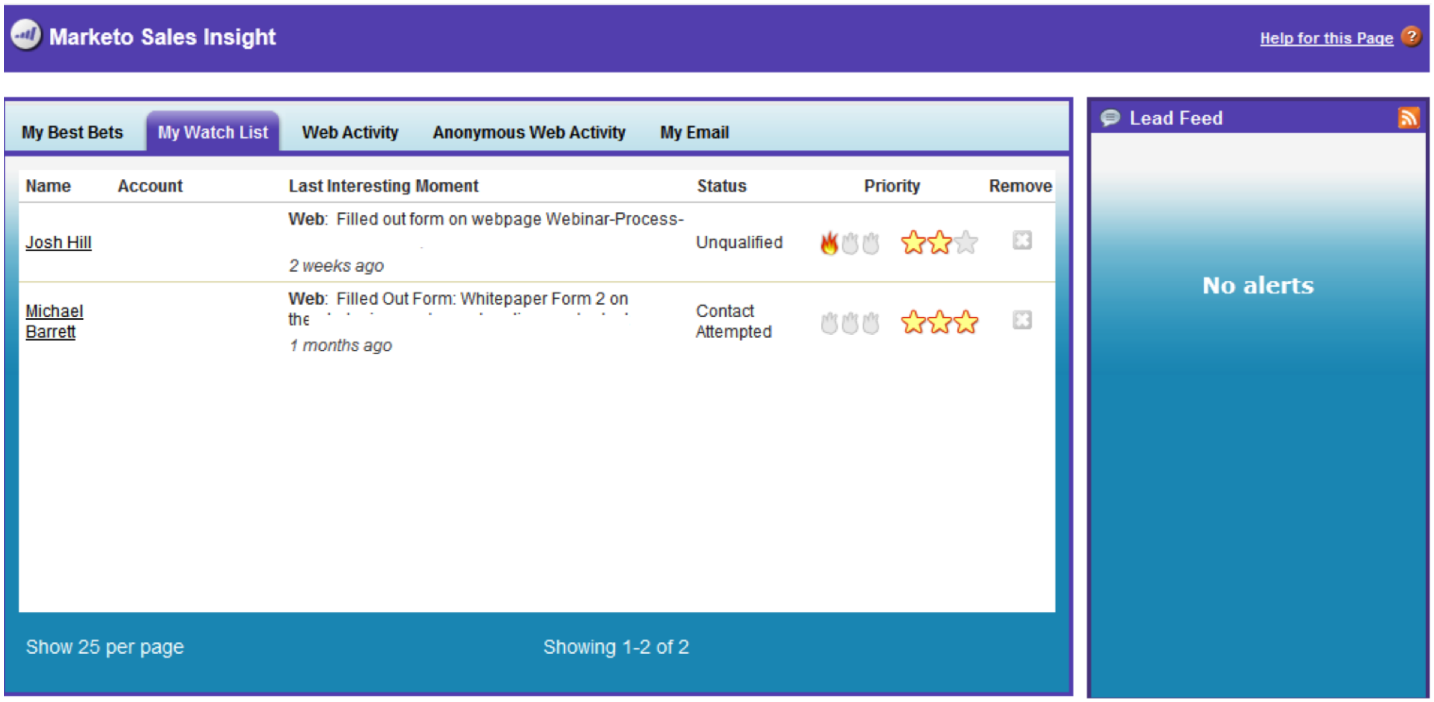
This is a Lead View using Marketo information to help you prioritize high scoring, urgent leads. Marketo will sort these automatically by Priority and Urgency.



My Watch List

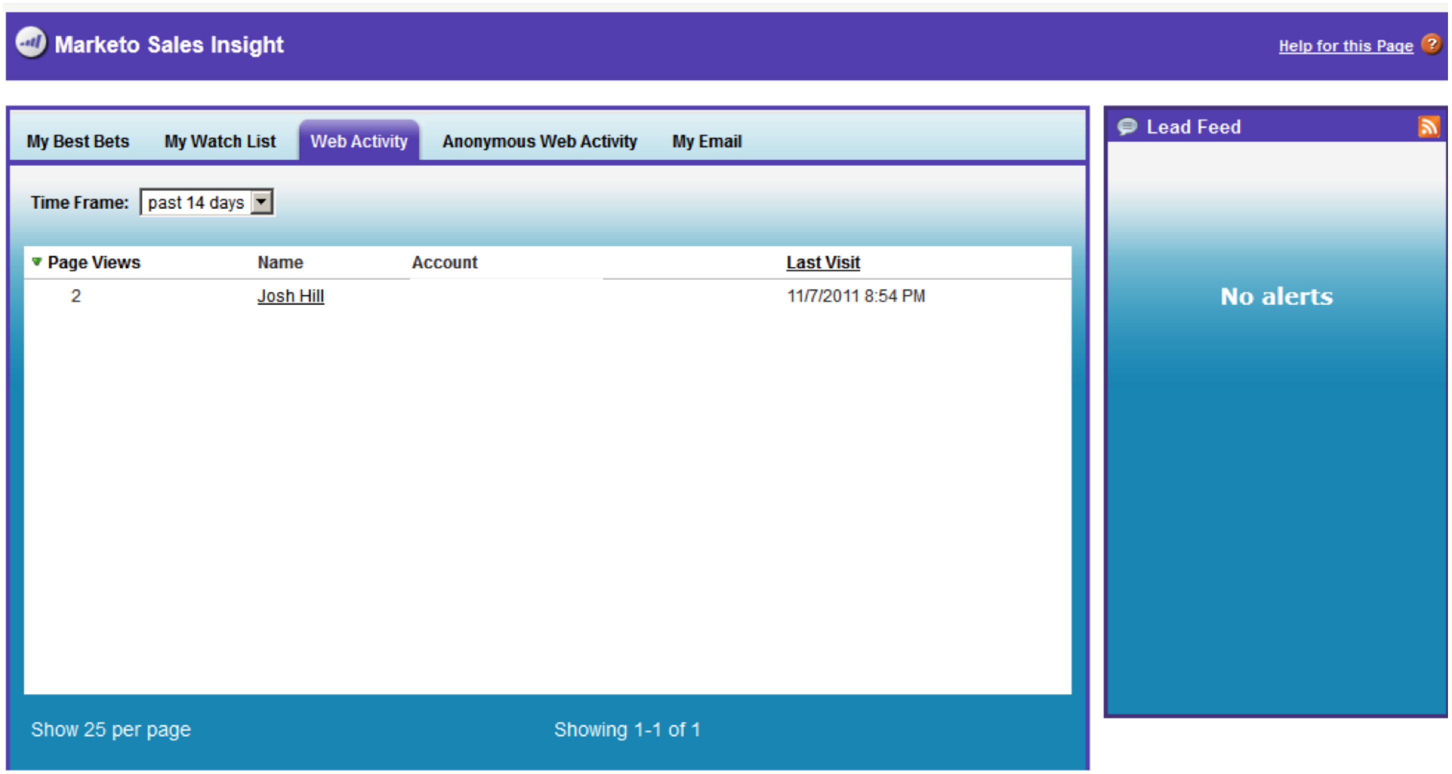
This is your personal lead watch list that you created by adding Leads to Watch. Use it to monitor Leads for certain kinds of activity. E.g.:

- If they are heavy website users, call them to help.
- If they download certain papers or attend a webinar, follow up.



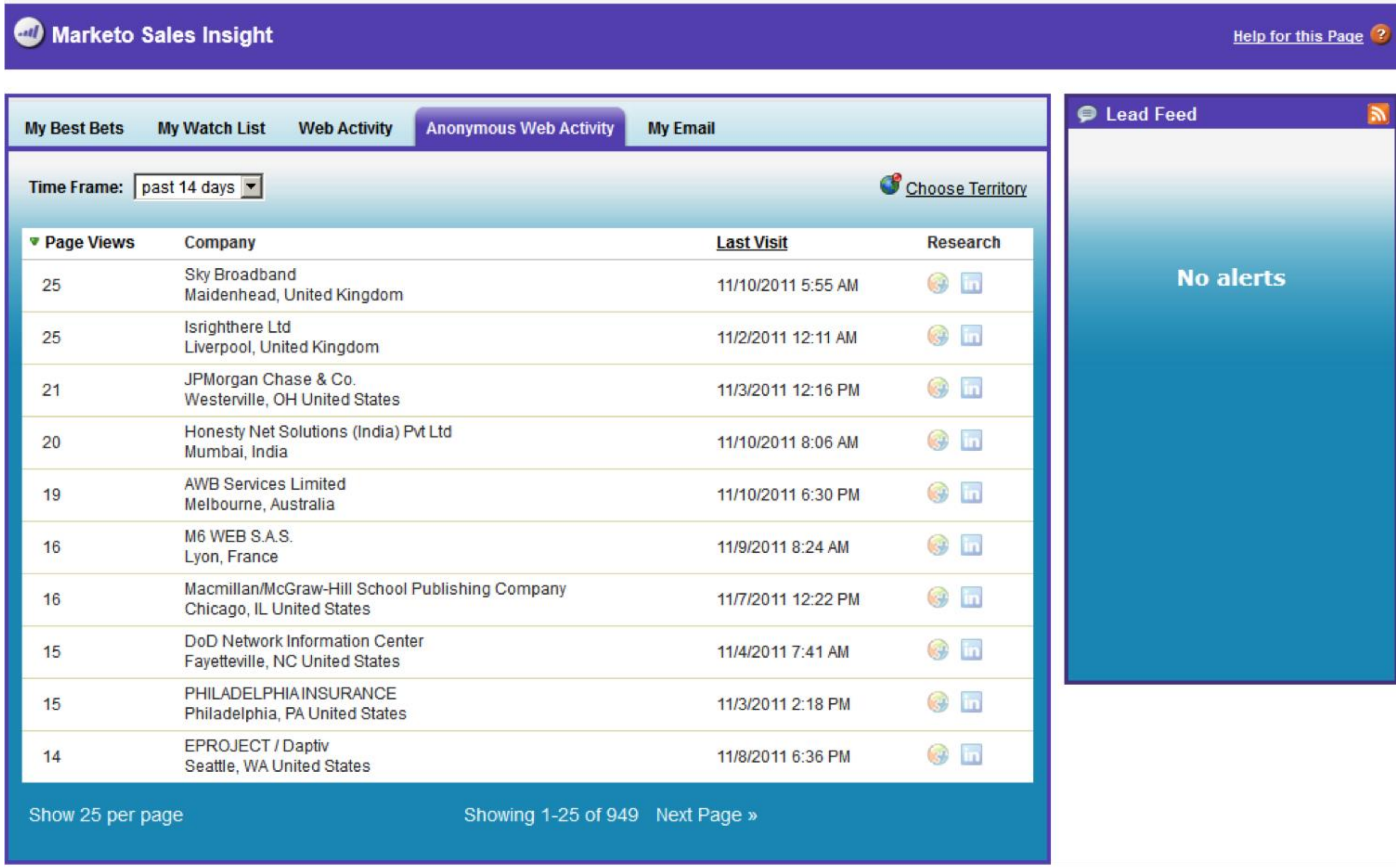
Web Activity

Monitor the pages and visits of Leads so you know what they are thinking about.



Anonymous Web Activity

This tab shows you which firms in your territory are visiting our website. It tells you the Page Views, Company Name, Last Visit.



For each firm, you can then click on the Jigsaw or LinkedIn button to do more research.

How is this helpful?

Anonymous web activity means that Marketo does not know about a specific person visiting the site. For instance, if you are working with Purina, and you see a lot of anonymous activity, you can infer that your contact's colleagues are curious about the project.

For firms you want to target, but have stale (or no) leads, renewed activity on our site may indicate an upcoming change in vendor or people. Call anyone you know there to learn what's going on.

Be careful: this is not perfect and you may see internet providers listed if the firm's servers do not allow reverse DNS lookup. If you have questions, please ask Marketing.

My Email

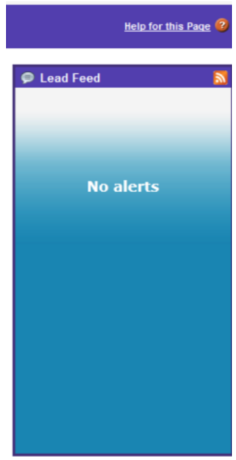
This tab shows you all of the email you sent under your name. It can be a useful record of what you've already sent people or to find certain kinds of email.

Your email history will also show you the level of engagement for types of email as well as specific Leads. If certain people are opening and clicking on your emails, that's great! Try to replicate that across other Leads.

Avoid re-sending emails or using emails which do not seem to be opened or clicked in.

Lead Feed

The Lead Feed column on the right side of your screen is a list of recent Interesting Moments or changes to your lead. This is useful for monitoring changes to leads you own. You can Subscribe to this entire feed using RSS and attach it to Google Reader. This can be a fast way to monitor events when on the road.



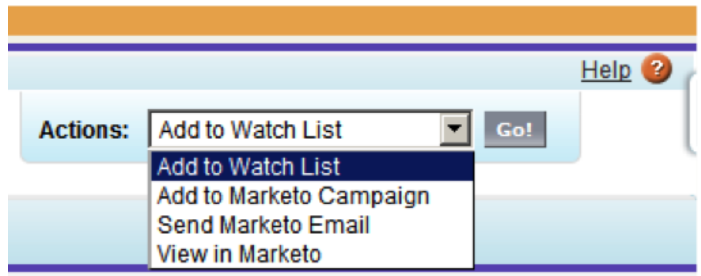
You can also subscribe to Email Alerts for a Single lead using the "Subscribe" link under the lead name. When you subscribe to email alerts, a dialog box asks you if this is the right kind of alert. Be sure to select an email address that you check.

Actions You Can Take

Sales Insight can help you take action immediately when you see what's going on.

Actions	What is this?	What it Means for Sales
Add/Remove to Watch List	Watch or un-watch this lead in your Sales Insight dashboard.	**RECOMMENDED**! Watch a key lead via RSS on the Marketo Dashboard (Marketo Tab).
Send Marketo Email	Send a personalized, marketing-provided email to this lead.	Send them a template email directly from your email address. You can modify as needed.
View in Marketo	See this lead as it appears in Marketo (read-only).	See their complete history from both SFDC and Marketo.

Actions	What is this?	What it Means for Sales
Add to Marketo Campaign	Add a Lead to a pre-set series of emails or ask Marketing to suspend emails to this person.	If Marketing has enabled it, they will tell you about pre-set nurturing emails or actions you can take.



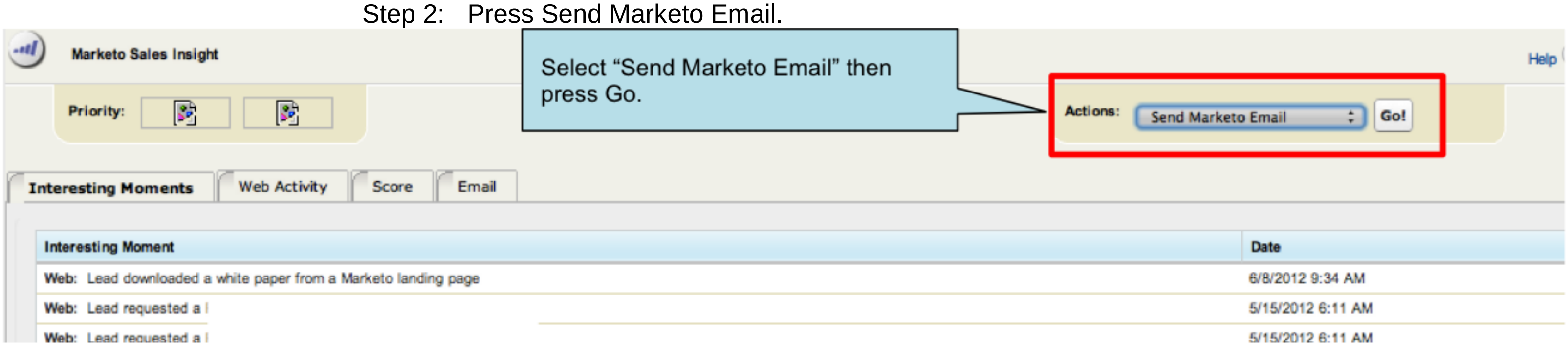
Send Marketo Email

The best way to send a single email to a Lead or Contact is via Marketo. If you send emails via Marketo, then you can track whether or not someone Opened or Clicked in the email. That way you will know if your email was successful in helping you get to the next sales stage.

It's easy to send your Lead or Contact an email directly from Salesforce.

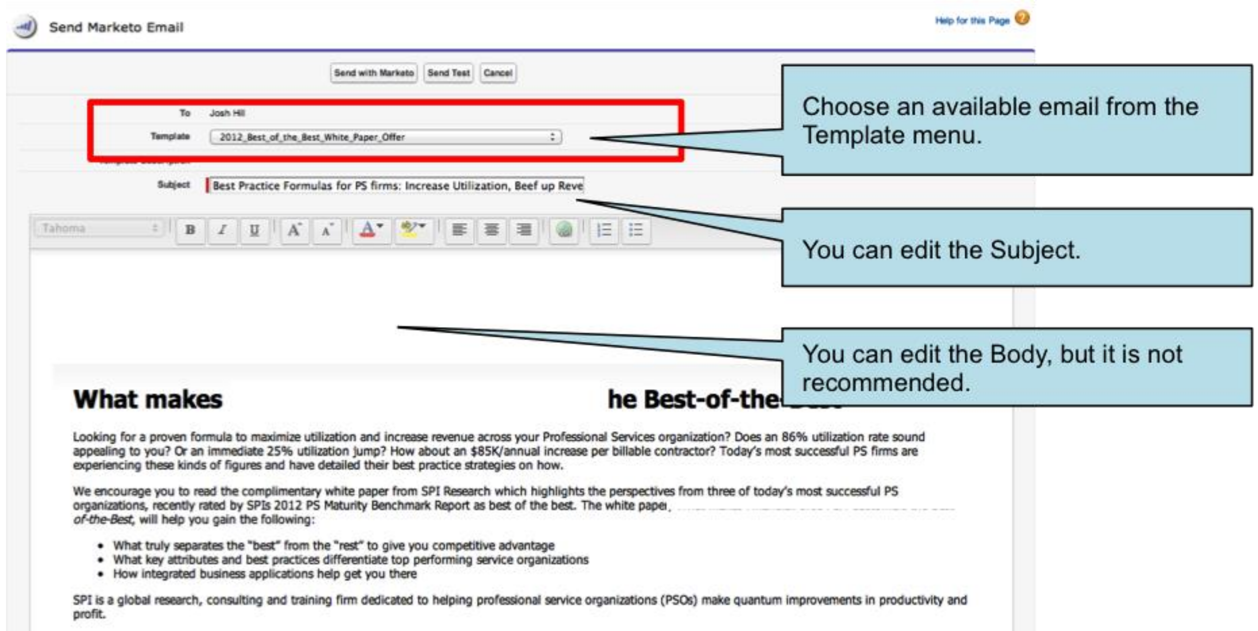
Step 1: Go to a Lead or Contact

Step 2: Press Send Marketo Email.



Step 3: Select a Template to Send

Marketing will make certain emails available to you. Feel free to edit them to create a more personal message.



Add to Watch List

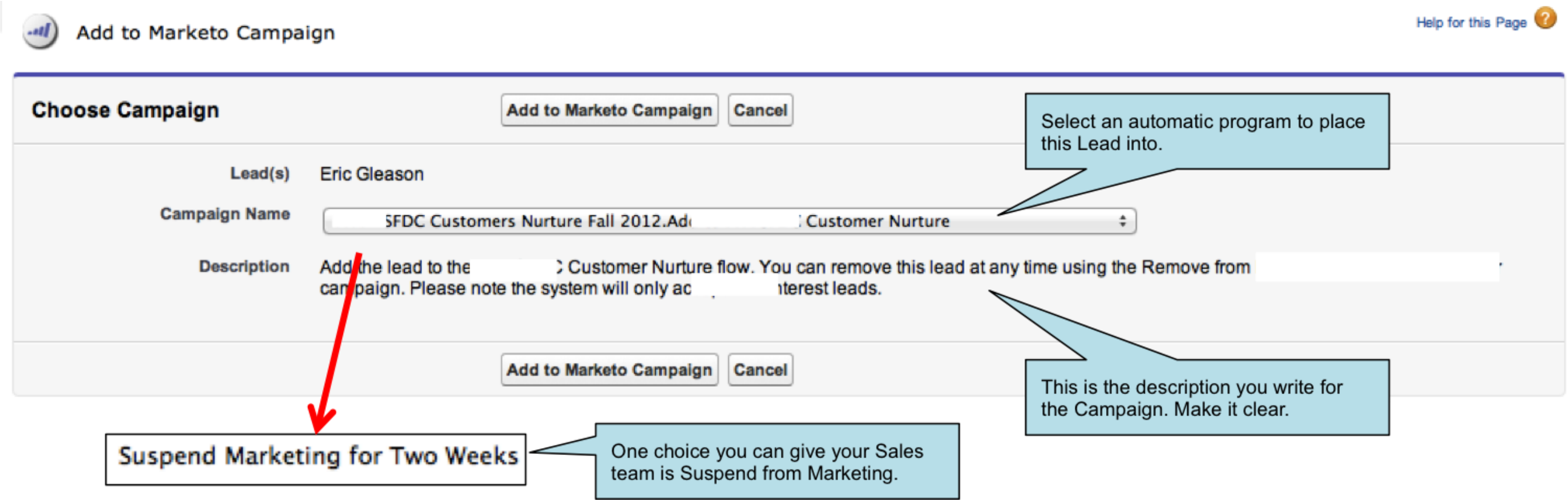
Add someone to your Watch List and it will appear in your Marketo Tab feed. The Watch List is a great way to sort and prioritize leads you want to monitor for key indicators of their buying interest.

Add to Marketo Campaign

Allows you to send this lead to an automatic program. The programs are setup by Marketing. Common programs include:

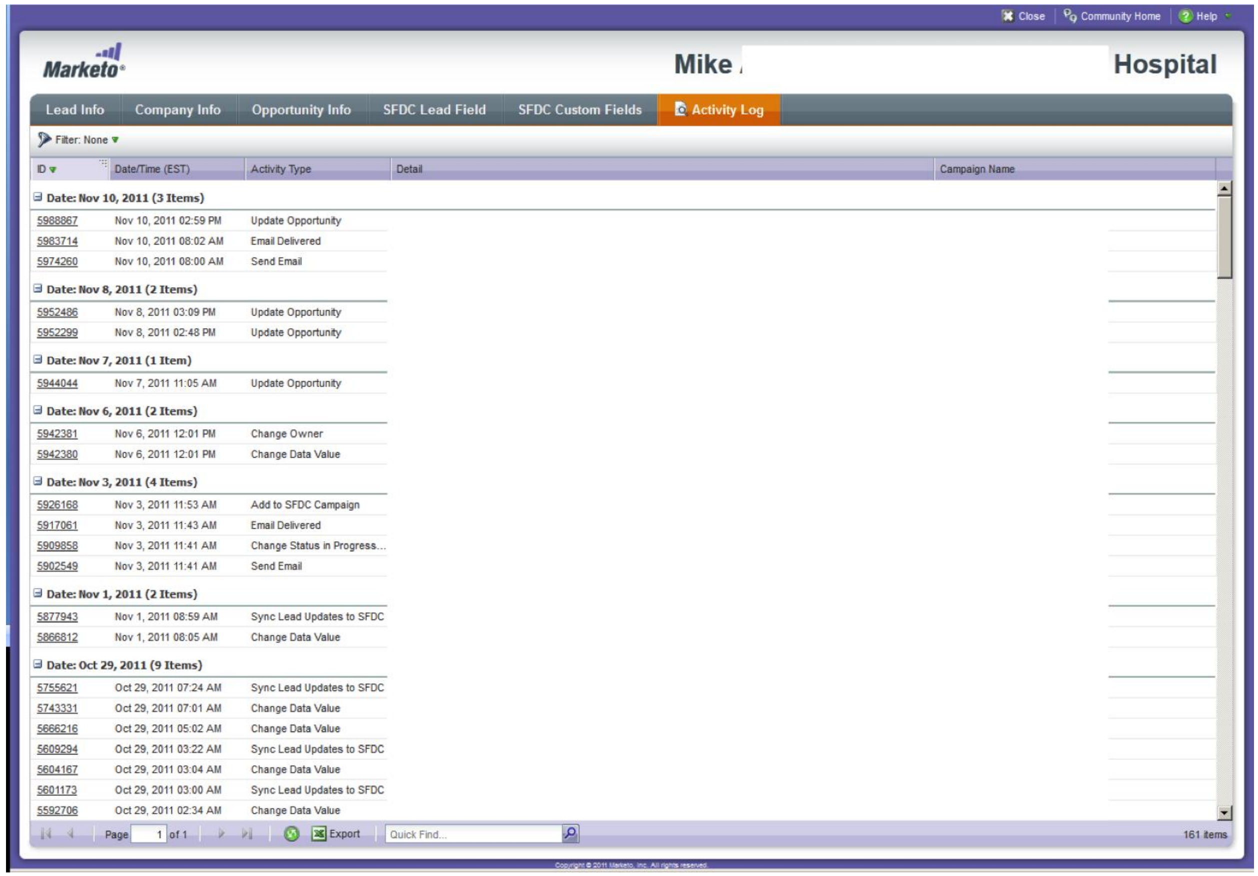
- **Marketing Suspend for 2 Weeks**: is that deal on the cusp of closing? Tell Marketing to stop sending those emails out while you handle things. It's automatic, hidden, and polite.
- **Add** to Nurturing Campaign for Product A: maybe you met the Lead at a show and want them to start receiving a series of emails about their interest in Product A.

- **Remove** from Nurturing Campaign fro Product B: tell Marketing to stop sending them Product B emails.



View in Marketo

This action shows you the Lead Detail View from Marketo – including all the juicy details from both SFDC and Marketo. (Sales Insight users can only view the details—they cannot change a record this way).



Sending Out Mass Emails

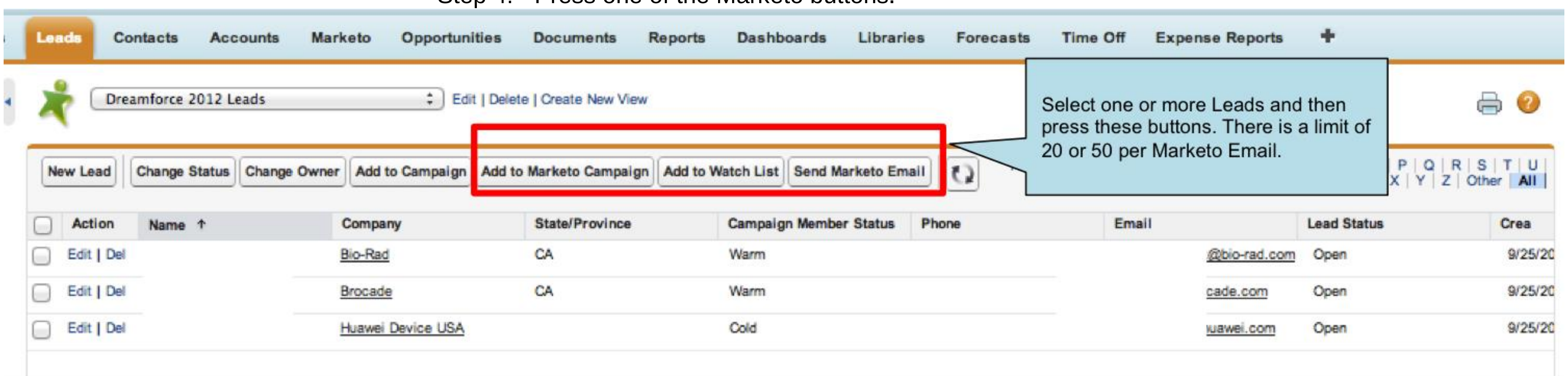
A common question is "How do I send out a great Marketo Email to a bunch of people?" The answer is easy! You can do this in a similar way to how you used to do this with Salesforce.

Step 1: In Salesforce, click on the Lead or Contact tab.
This will bring up the Lead View.

Step 2: Choose a Lead View

Step 3: Select on or more records to Send an Email to

Step 4: Press one of the Marketo buttons.



Step 5: Choose the Email or Campaign to Send
You can Send to 1 person or up to 200 (may depend on browser).

Some of the emails that will be available to you include

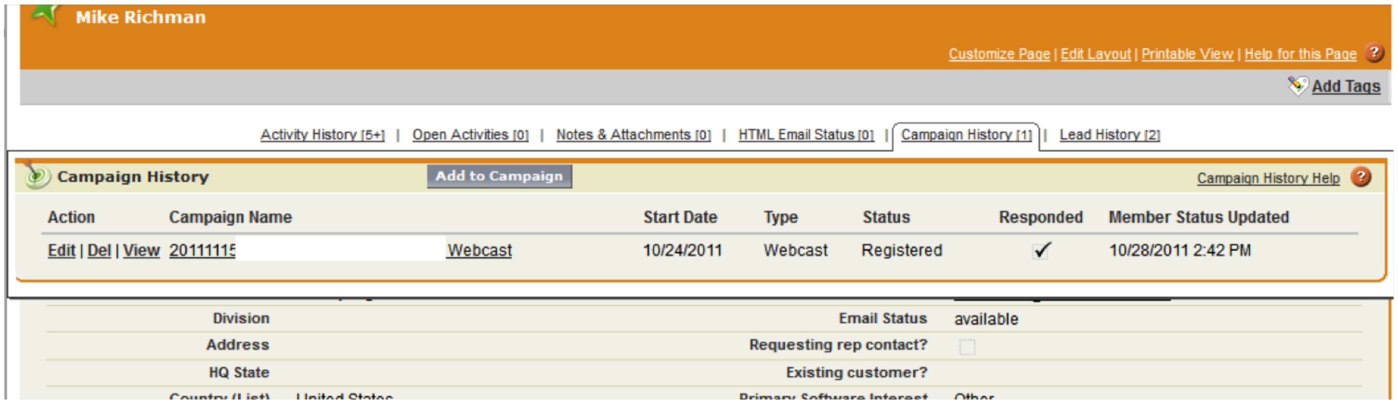
- Whitepapers
- Upcoming webinars
- On-demand webinars
- Review the campaign timelines doc
- Look for chatter updates

Other Helpful Information in Salesforce

In addition to the behavioral details that Marketo provides, similar data is also directly in Salesforce. Each Contact and Lead record can show you these details at the bottom of the page or by placing your mouse over the links at the top of the record.

Campaign History & Member Status

This area provides details on Events, Webinars, Trade Shows, and certain email campaigns, which we use to engage our target audience. You can use this detail as part of your follow up or to know their original sources. Marketing relies heavily on this data to manage campaigns, report on successes, etc. Sales people can use it to better understand how the firm is communicating with the Lead.

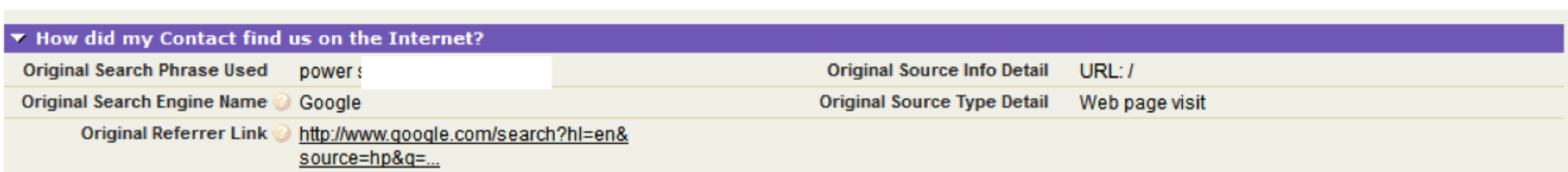


Activity History

These Activities may be Meetings, Tasks, or Automatic activities. They provide insight into who has engaged the Lead previously and what other emails they may have been Sent.

Internet Sources

While more often used by Marketing and reports, the original internet details of a lead can be interesting. You can use this detail to understand what pages, web forms, or activities the Lead came in from originally. Using this detail can help you decide how to approach your call.



Lead Source

Shows the origin of the Lead: was it from a Trade Show? Roadshow? Inbound Call? Cold Call Out? This information may help Sales understand the first contact you had.

Lead Status

Where is the Lead right now? Has someone already called? Did it just come in? Is it Junk?

Original Source Info

This may tell you about the search engine used or the referring website before the lead found your firm. Sometimes Marketing will place helpful detail here about their promotions.

Original Search Phrase

If the Lead found you via a search engine, then you may be able to see the keywords they used to find you. Sometimes those keywords will be helpful in focusing the conversation to what the Lead actually wants.

Lead History

The bottom of each page contains Activity History, Open Activities, Notes, HTML Emails (from Salesforce), Campaign History, and the Lead History.

Lead History tracks specific actions taken on the Record. You can see who created it and who has moved it around. This information is occasionally useful for internal discussions.

Happy Selling!

Marketing Rockstar's Guide to Marketo

The Marketing Rockstar's Guide to Marketo is the marketer's guide for a highly successful Marketo marketing automation system. Marketo is a fun system for a serious purpose: to help marketers bring money to the table. This Guide leads new Marketo users on the journey from old ways of interruption marketing to new inbound and demand generation techniques.

Marketo Certified Expert and Champion, Josh Hill, wrote the Marketing Rockstar's Guide to Marketo to answer critical questions for everyday marketing situations such as, "How do I use Marketo to do…" or "How can I track…" Inside, Josh details Marketo secrets, organizes useful documentation, and brings in other experts from the Marketo world to help you bring in leads with Marketo on your very first day.

ABOUT THE AUTHOR

Josh Hill is a Marketo Certified Expert and Marketo Champion since 2012 and a user since October 2010. He is an experienced sales and marketing professional with 17 years of service in technology, customer service, website development, business-to-business sales, and marketing. Josh guides marketers through the new Revenue Performance Management world.

Josh is Vice President of Marketing at Alacra, a financial information provider, where he is responsible for demand generation, marketing automation, branding, and e-commerce.

You can find Josh on the Marketo Community or his marketing blog.

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