



EXPERIENCE MAKERS^{LIVE}





CREATING A SINGLE SOURCE OF TRUTH

Brooke Bartos, Senior Marketing Operations Manager, Walker Sands | **Andy Caron**, Senior Marketo Consultant, Revenue Pulse

ABOUT US



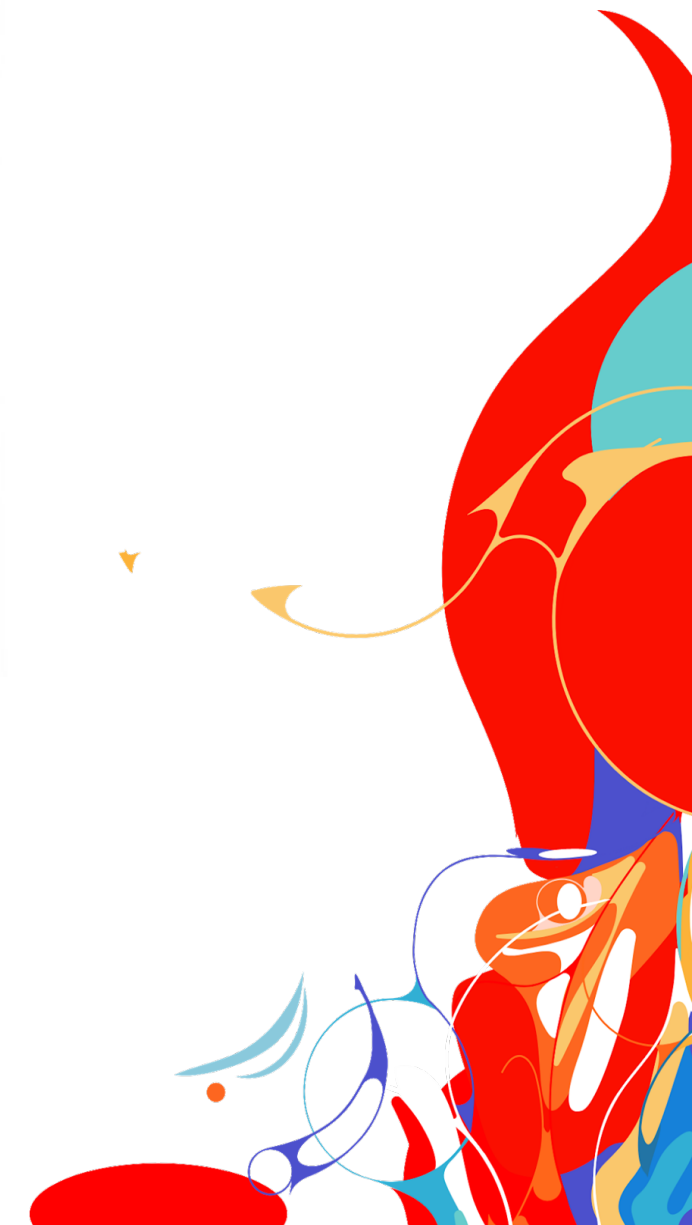
Brooke Bartos

Senior Marketing Ops Manager
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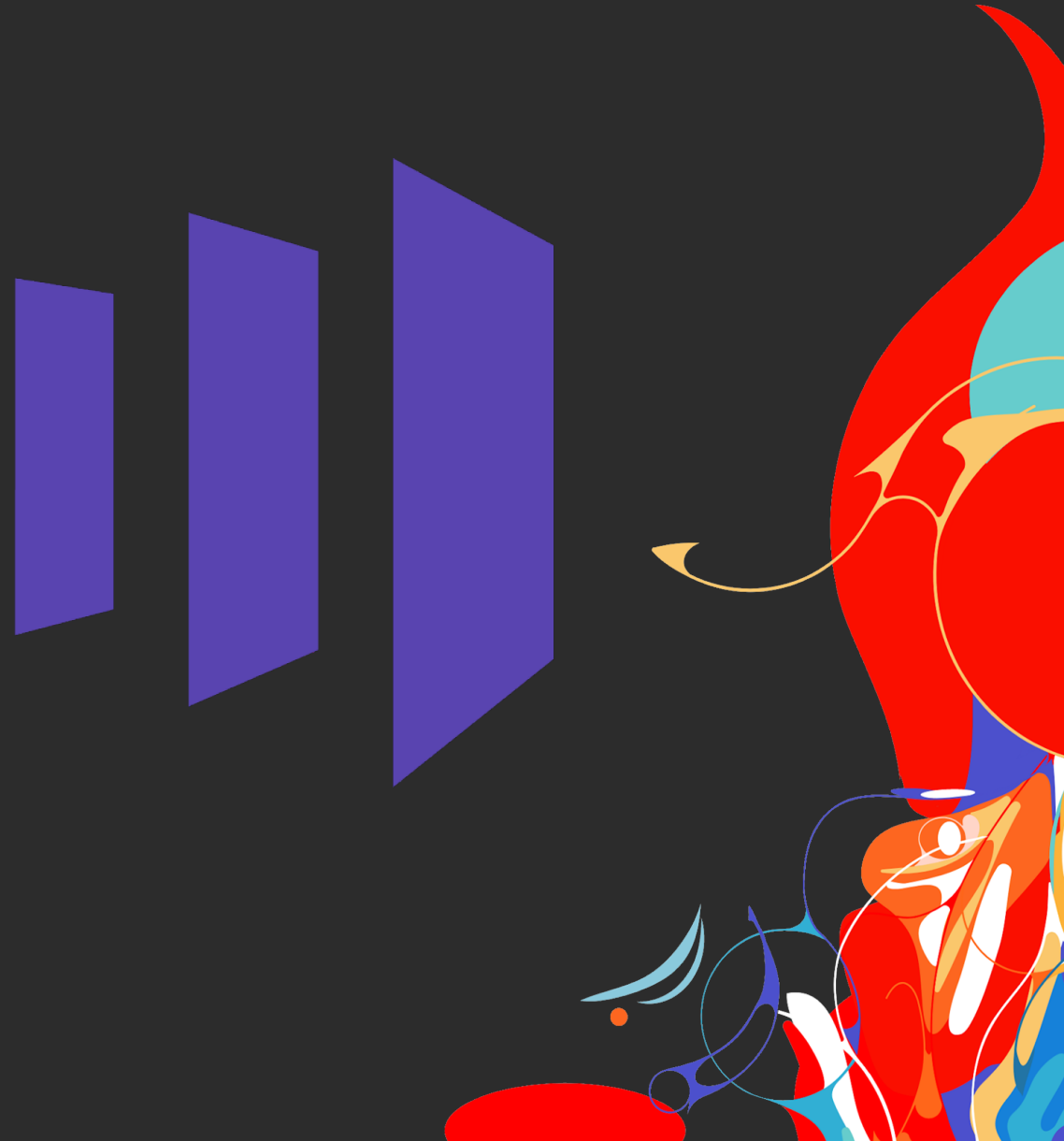


Andy Caron

Senior Marketo Consultant
Revenue Pulse



- Find the Data
- Use the Data
- Up-Level the Data



The use of elements like Source, Channel, UTMs, Acquisition Programs, etc.

Help provide us with the data we need as marketers to go from making decisions based on intuitions or gut feelings...

To data driven decision making.

FIND THE DATA



WHAT'S THE BIG DIFFERENCE?

Person Source

A distilled, scalable data point of the earliest tracked moment that brought someone to your website or into your database.

Broad.

Search	Event
Referral	Purchased
Social	Sales
Display	Partner

UTMs

Drilled down tracking codes used to indicate the inbound origin for each website visit.

Broad to Specific.

SOURCE:

Google, Bing, LinkedIn, etc.

MEDIUM:

Organic, CPC, Referral, etc.

CAMPAIGN:

Unique to each asset, campaign or program

<https://www.optimizesmart.com/understanding-channels-in-google-analytics/>

Acquisition Programs

The first program that got the person/lead to give us their email address.

Very Specific.

HOW HAVE WE SEEN THIS FIELD USED/MIS-USED HISTORICALLY IN SYSTEMS?

Scenario 1

Website	Other
Web Lead	Email
Form	BLANK
Purchased	
List Upload	
Sales	

Scenario 2

ZoomInfo	Twitter
Prospecting	Instagram
Outbrain	Tradeshow
DoubleClick	Conference
Google	Event
Bing	Webinar
Yahoo	Other
Linkedin	BLANK
Facebook	

Scenario 3

2015 GT Whitepaper	i-expo 2017
Customer Webinar 3/7/17	2016_webinar_TTLWH
Infographic – TA_Analysis-2016	2018 OBJ Whitepaper
2016 A/B eBook	Prospect Webinar 7/7/18
Webinar HTBABMT_2015	PB_Infographic-2018
i-expo 2018	2017 eBook_TGT
TS-2015_X-ia Long Beach-Booth	BLANK
LeadIQ_List 2/21/15	

PERSON SOURCE BEST PRACTICE

Person Source

- Organic Search
- Paid Search
- Organic Social
- Paid Social
- Purchased
- Sales Generated
- Tradeshaw
- Partner Referral

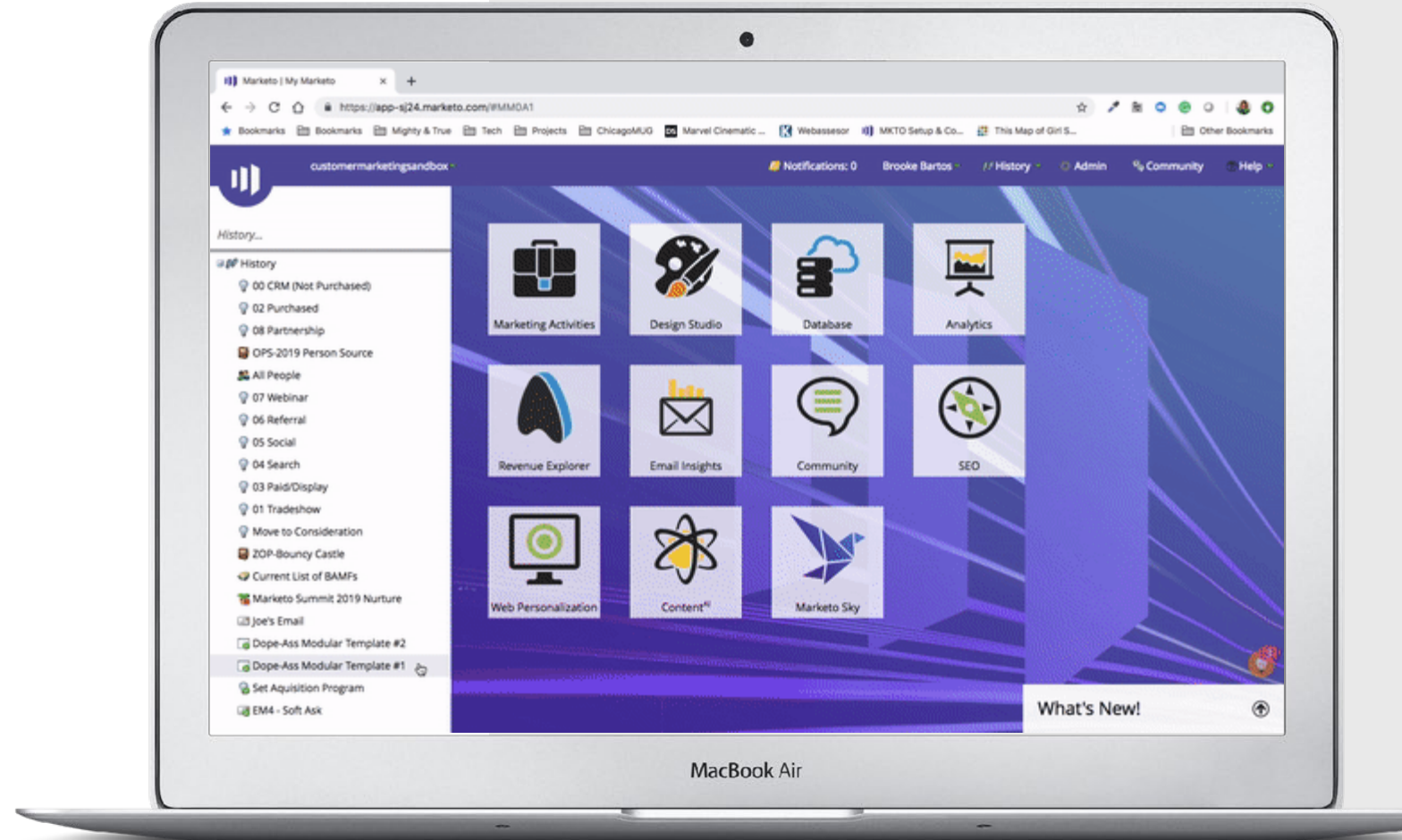
Person Source Detail

- Google
- Bing
- Twitter
- LinkedIn
- Facebook

YOUR STARTING POINT FOR SOURCE

Detail where to find source info

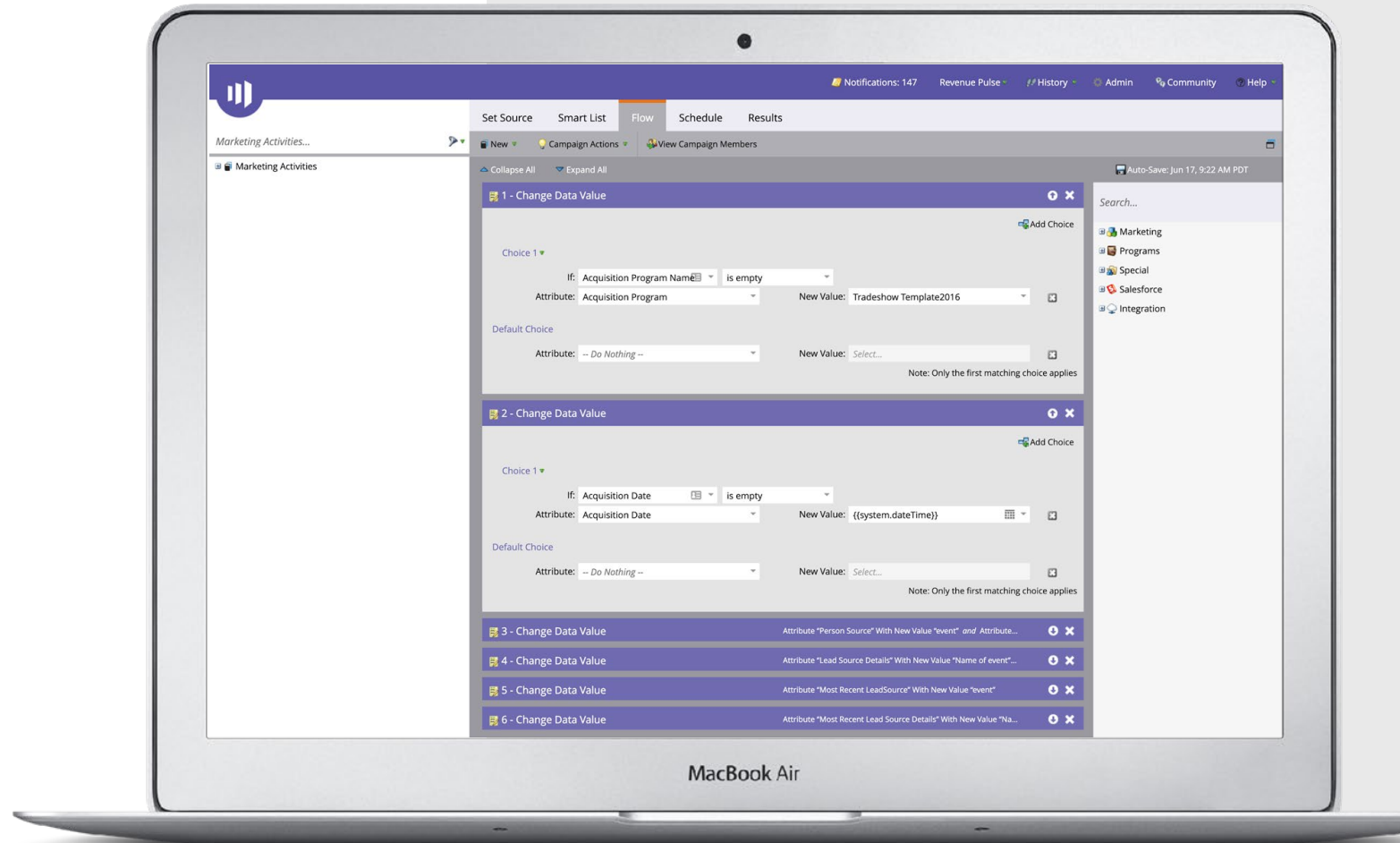
- Database
- Quick snapshot of sample there
- Navigate to 'All People'
- Add all Person Source fields to your view
- Use export functionality at bottom of view



DEFINING ACQUISITION PROGRAMS IN MARKETO ENGAGE

What is an Acquisition Program

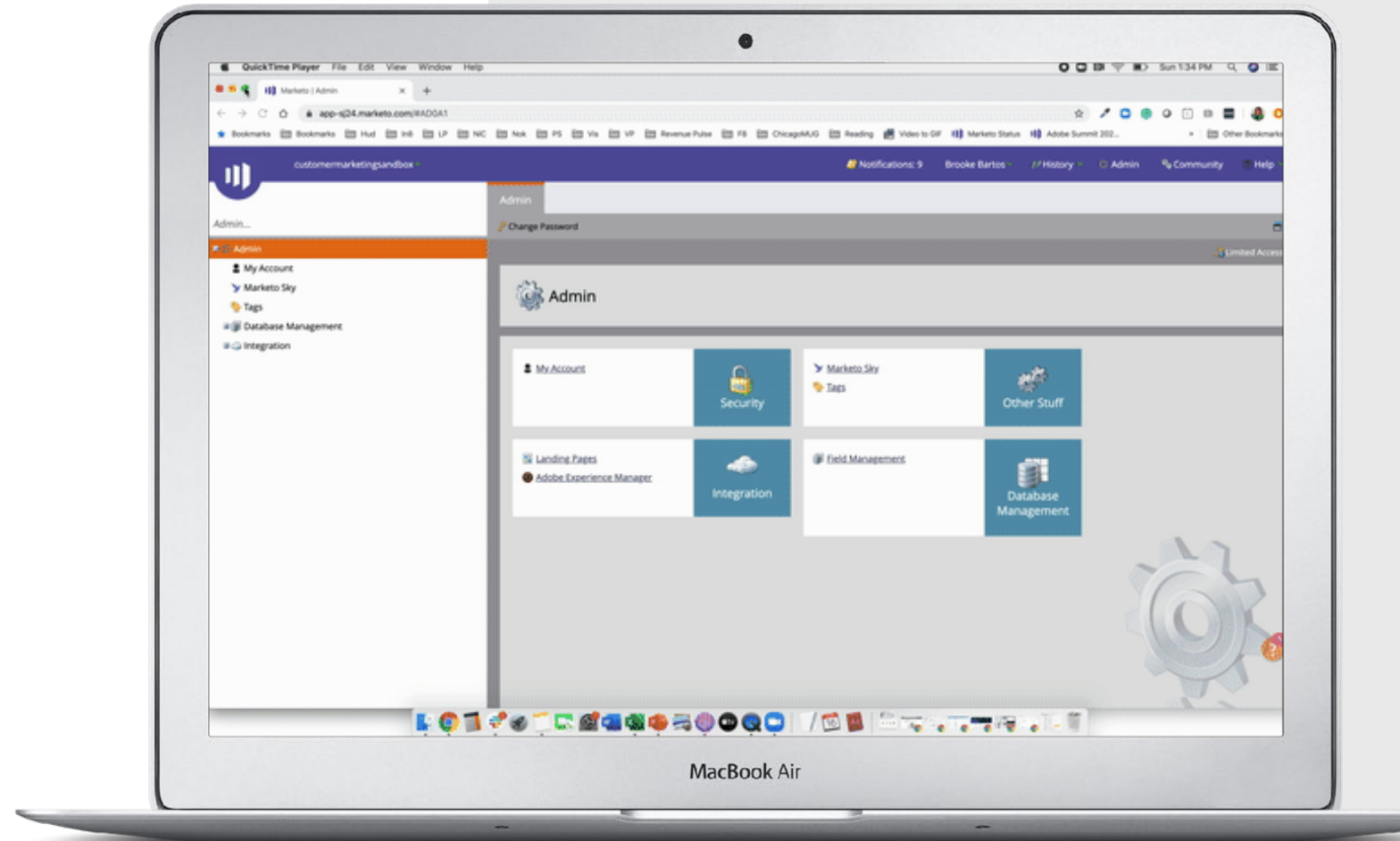
- Marketo Engage Form on Local Landing Page Asset
- CSV Upload directly to Program
- CSV Upload to Static List
 - Select Acquisition Program
 - Set Program Status via Smart Campaign
- Use Smart Campaign to Set:
 - Acquisition Program (if empty)
 - Acquisition Date (if empty)



STARTING WITH YOUR MARKETO ENGAGE PROGRAMS

Starting off on the right foot

- Choose the right Program Channel with the right Statuses



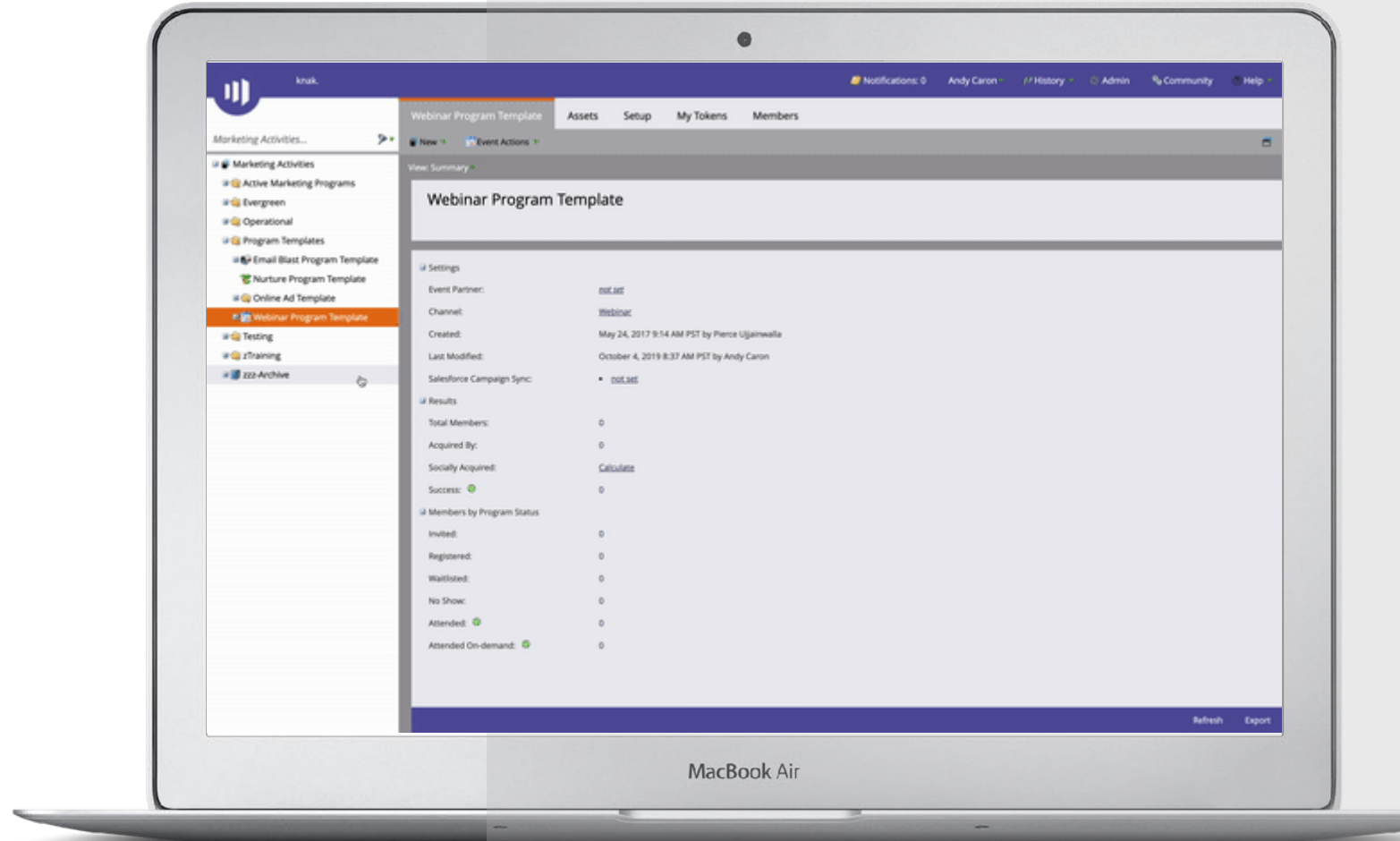
*Champion Tip: Clearly define what is “Success” for every channel – not just for Marketing Ops, but cross-organizationally

STARTING WITH YOUR MARKETO ENGAGE PROGRAMS

Providing Program Data to Attribution Tools

- Sync to CRM (Salesforce Campaign)
 - Can be disconnected and then synced directly from a Smart Campaign flow step
- Create SFDC Campaigns via Marketo Engage to ensure Status alignment

*Champion Tip: If you create your SFDC Campaigns via Marketo Engage, the statuses in the Campaign will automatically match your Marketo Engage Program Statuses

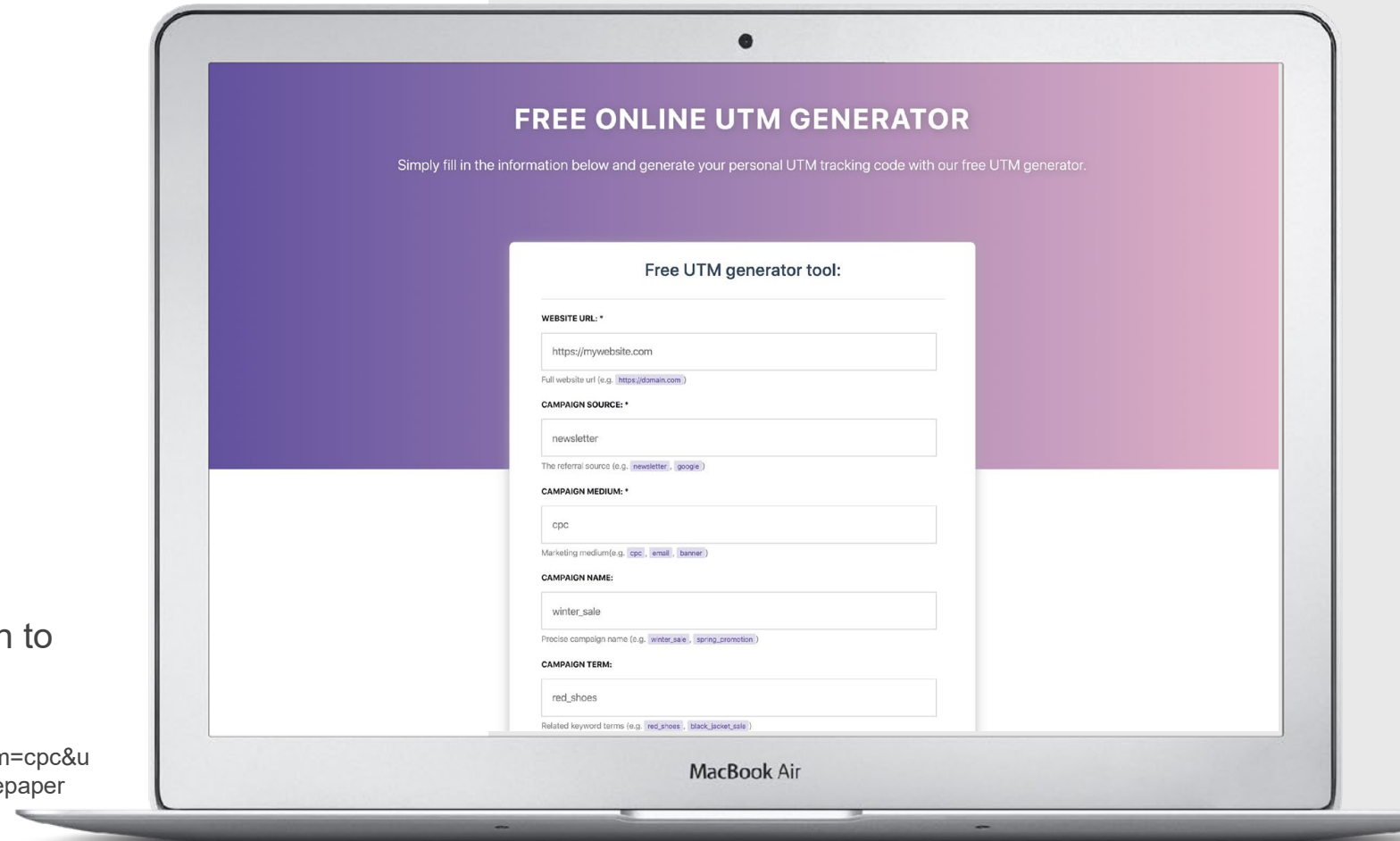


GENERATE UTMS

How to create UTM data

- Use a UTM Generator tool to note:
 - Source (mkto, linkedin, google, etc.)
 - Medium (email, cpc, etc.)
 - Campaign (campaign audience)
 - Content (campaign content name)
 - Any custom parameters you may wish to use for tracking
- Example
`https://www.yourdomain.com/?utm_source=google&utm_medium=cpc&utm_campaign=na-martech-it&utm_content=findings-in-tech-whitepaper`

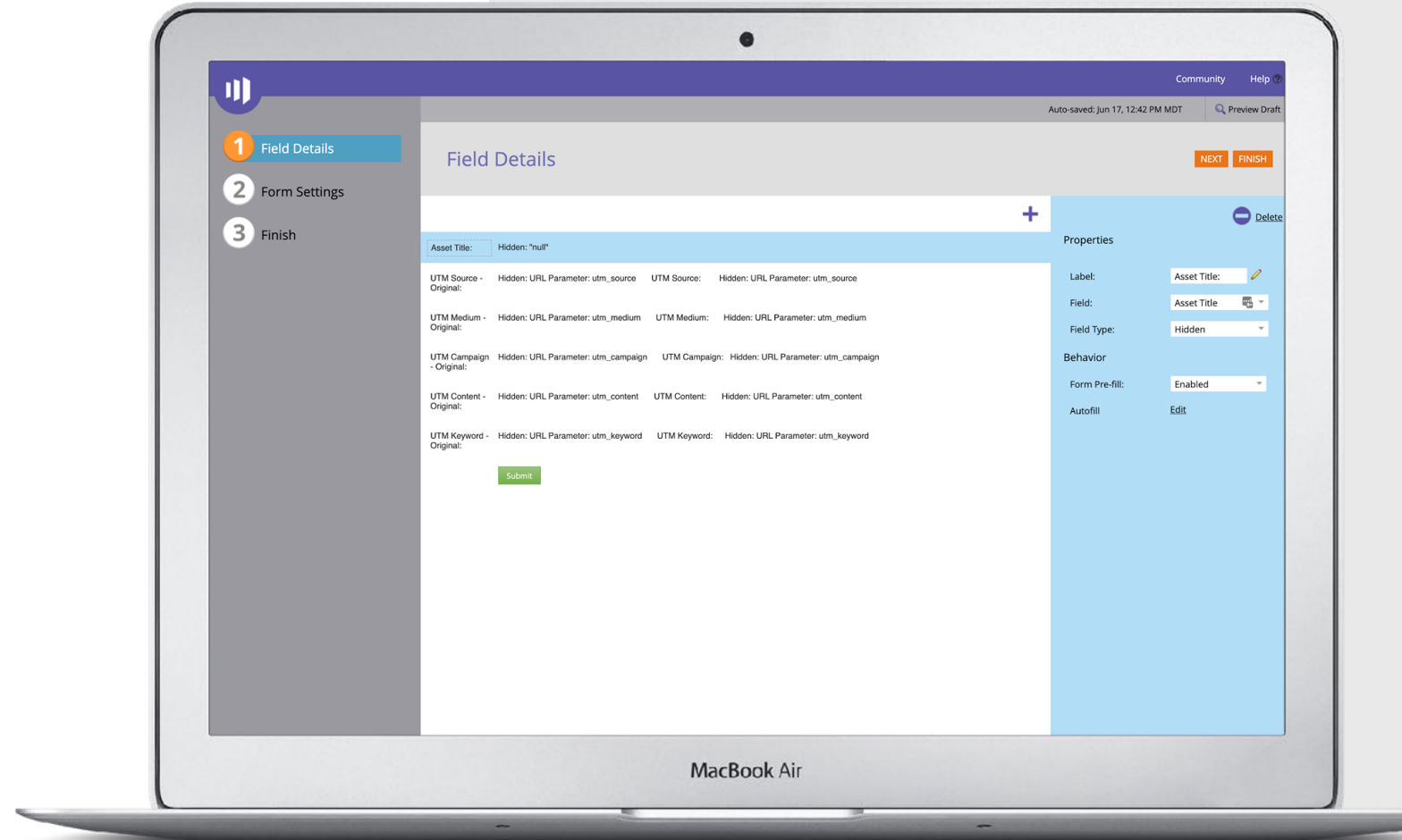
*Champion Tip: You can create a master google sheet for UTM creation.



GATHER UTMs

How to capture UTM data

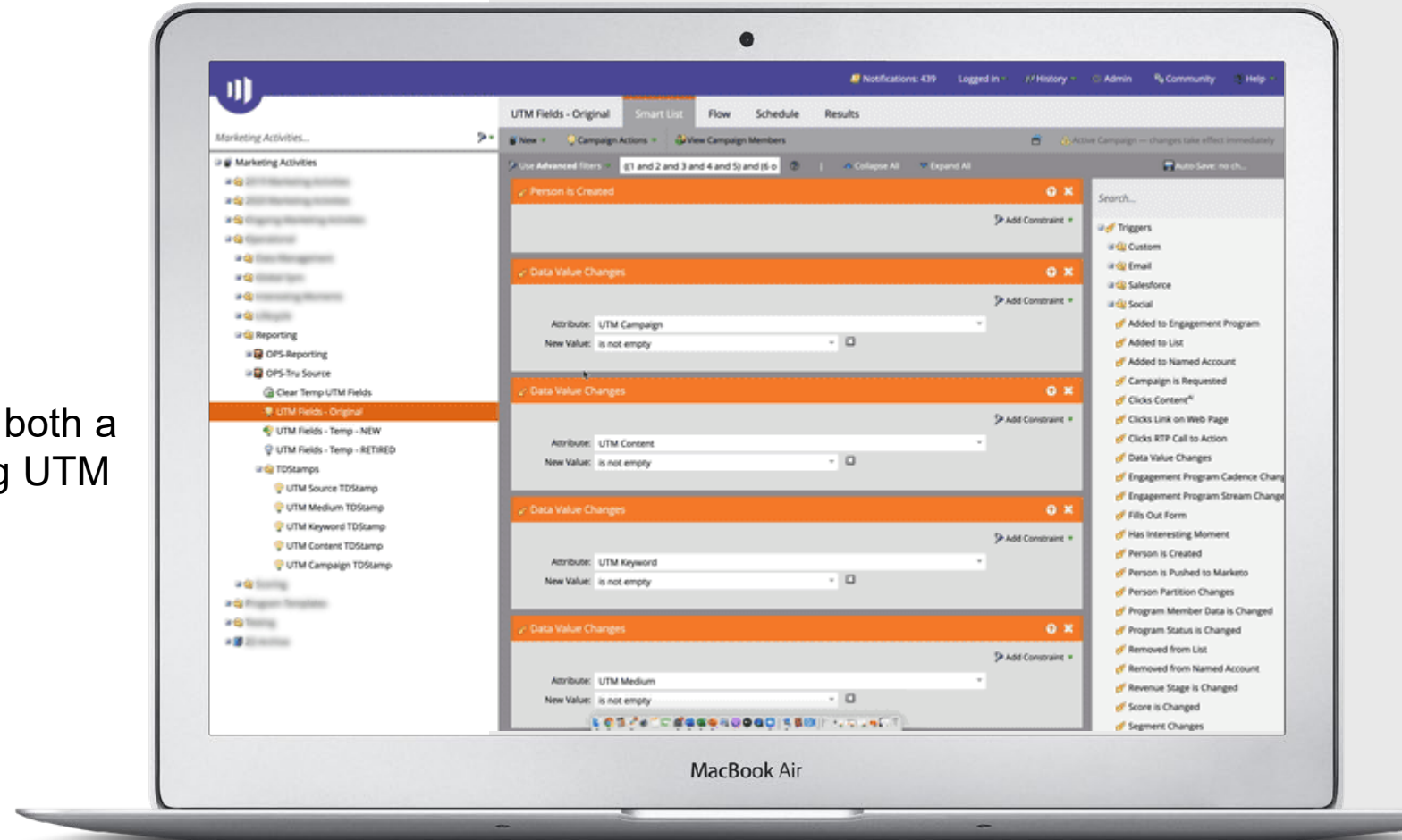
- Marketers can gather UTM fields via:
 - A custom cookie
 - Parameters on the form's page URL



SYNTHESIZE UTMS

How to leverage UTM data

- Savvy Marketers can manage UTMs at both a Program and System level by managing UTM fields Operationally.



USE THE DATA

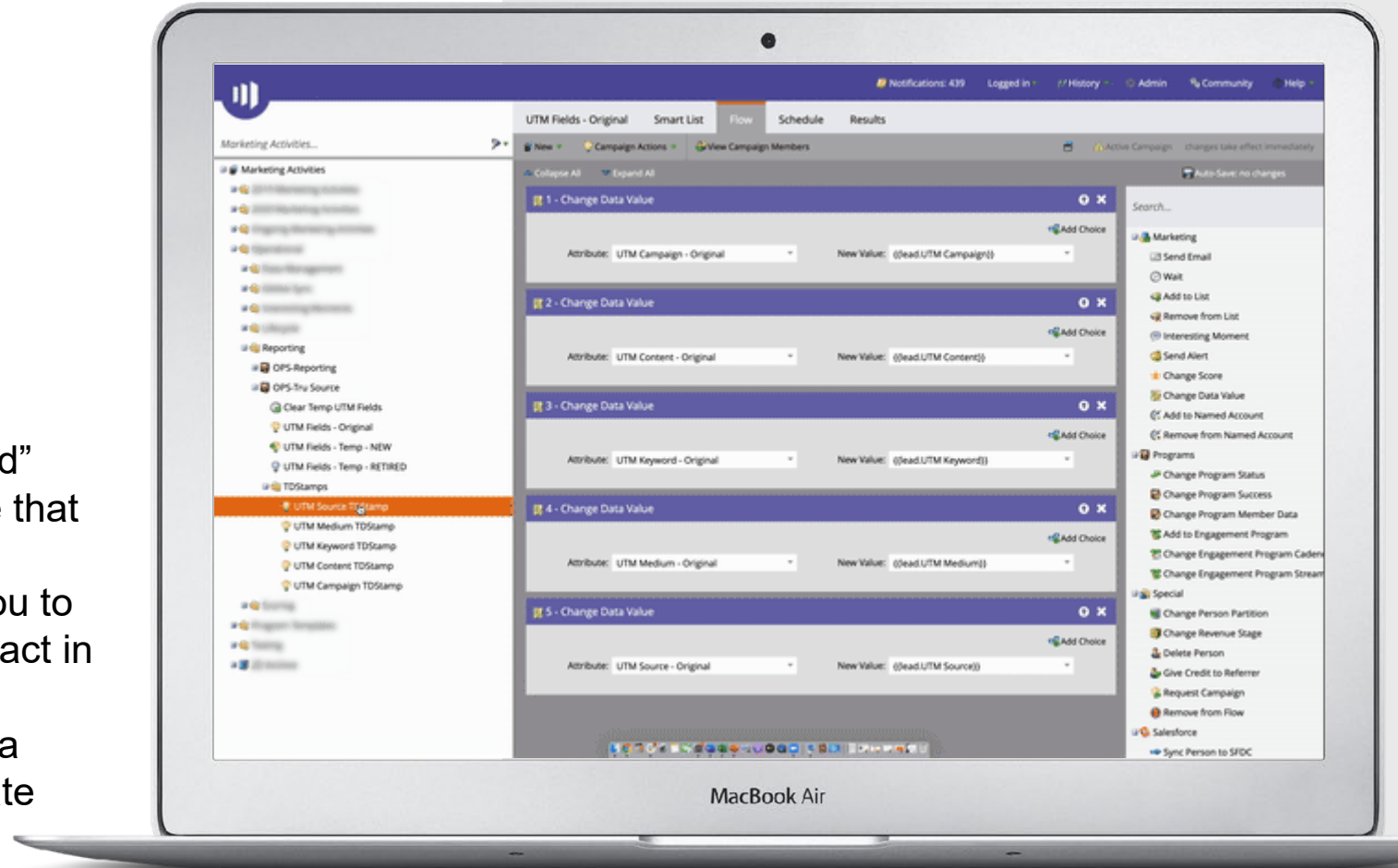


PROGRAM/CAMPAIGN LEVEL UTMS

Synthesize UTMs for different purposes post-collection

- New Marketo Engage fields “Program Field” allow you to log values in Marketo Engage that are specific to that campaign.
- Leveraging TEMP UTM fields can allow you to pass information forward to the Lead/Contact in SFDC
- Write UTMs into SFDC Task/Activities for a searchable object with an inherent time/date stamp

*Champion Tip: If you use SFDC generated fields on the Lead/Contact you can use SFDC Apex/Workflow to write UTM data to the Campaign Member.



PERSON SOURCE MOST RECENT OPS SETUP

One Operational Program

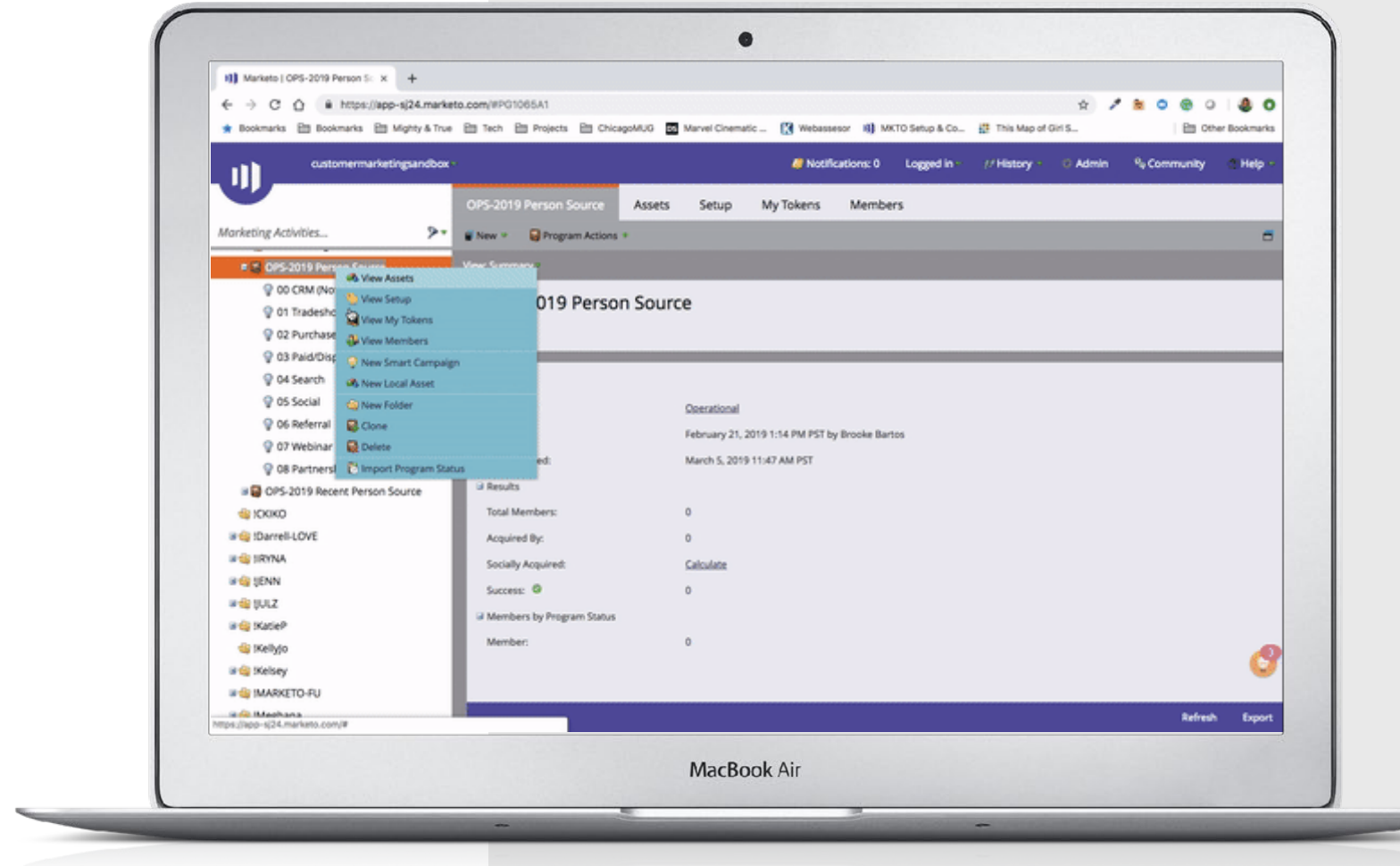
- Controlling Smart Campaign
- Smart Campaign for each Source

Smart List

- UTMs
- Original Fields

Flow

- Add to Campaign
- Change Data Values
 - Most Recent Person Source
 - Most Recent Person Source Detail



MOST RECENT PROGRAM OPS SETUP

One Operational Program

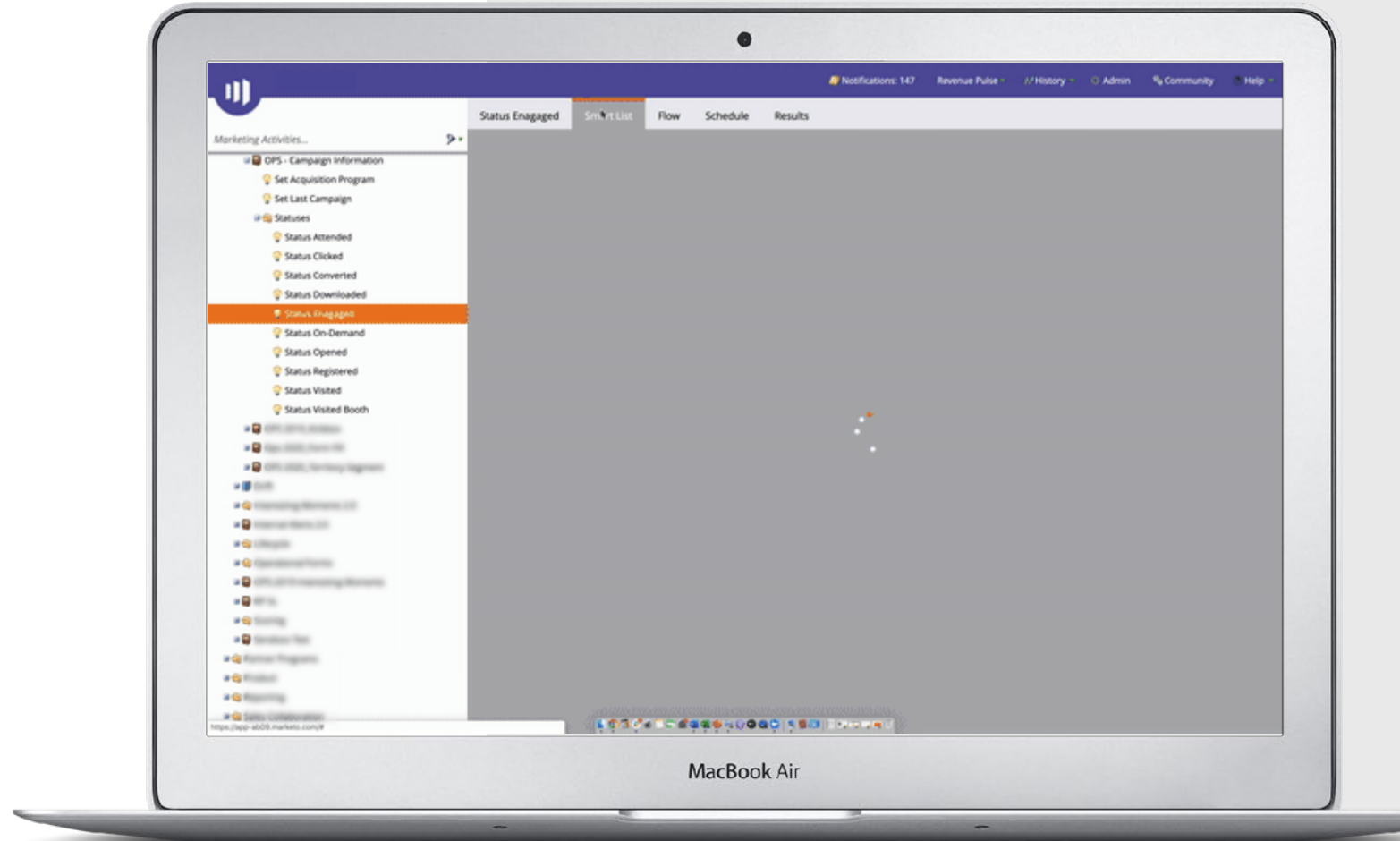
- Most Recent Marketing Campaign
- Campaign Status Smart Campaigns

Smart List

- Program Status is Changed (Status is Not Operational)

Flow

- Use tokens to copy Most Recent Campaign Status (TEMP) and Trigger Name into a single field
- Standardize Statuses based on success into a Temp field



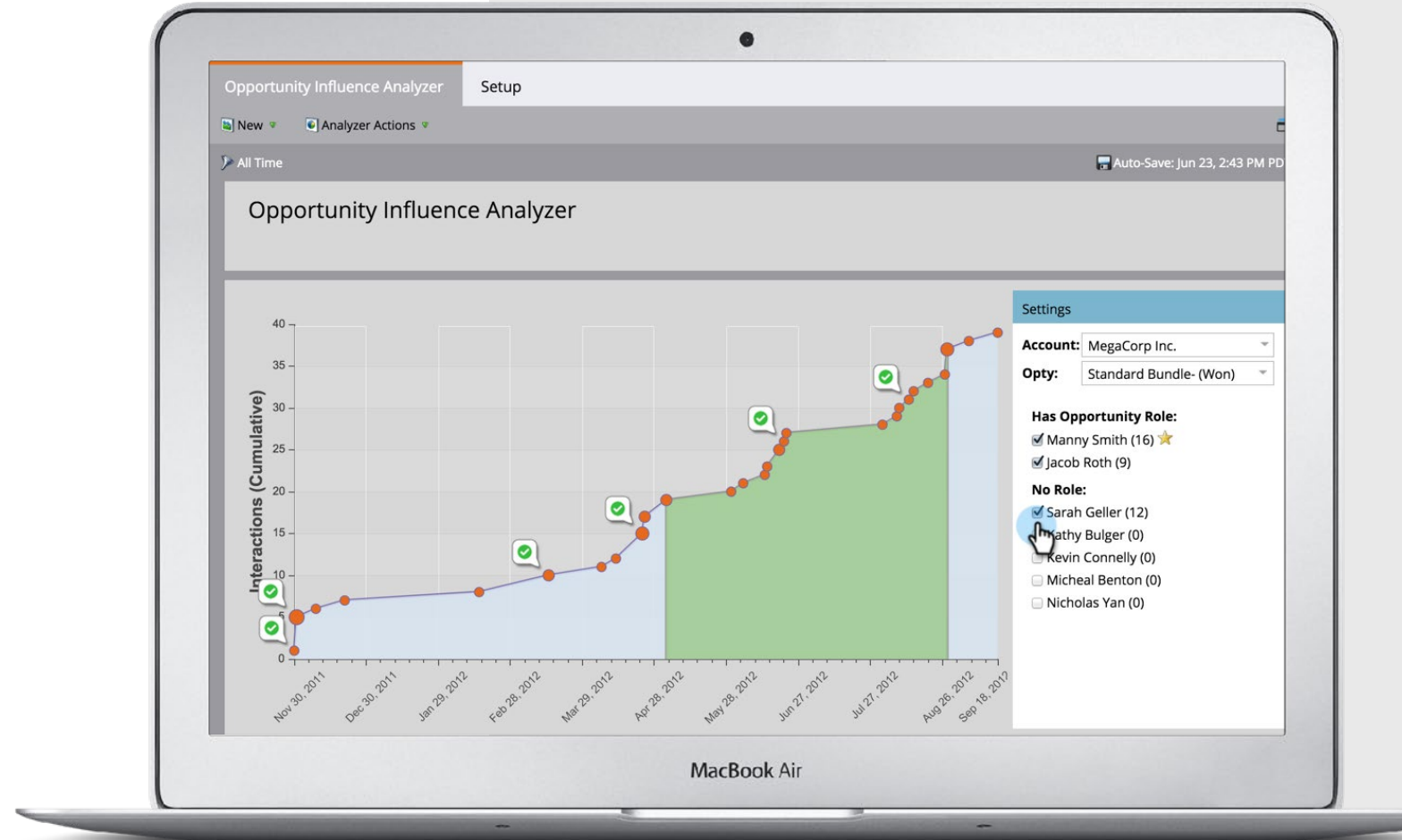
NATIVE REPORTING

Basic

- Program Performance Report
- Lead by Source with Opportunity
- Lead by Revenue Stage

Analyzers

- Program Analyzer
- Opportunity Influence Analyzer



UP-LEVEL THE DATA



PIPELINE REPORTING

Medium and Source Data

- Identify the Medium and Source that have been impacted the highest volume of opportunities and opportunity amounts
- What are your star performers?

Pipeline by UTM					
Year of Opp Crea..	UTM Medium	UTM Source	Total Attribution Amount	Opps Influenced	Avg Opp Size
Grand Total			\$49,922,404	2,625	\$27,084
FY 2020	banner	gdn	\$1,292,746	157	\$9,203
		google	\$0	3	\$0
		idg	\$2,828	5	\$581
		...	\$7,131	2	\$6,459
		...	\$13,821	18	\$850
		...	\$0	6	\$1,172
		...	\$109,008	8	\$28,361
	direct	ae	\$0	1	\$18,079
		facebook	\$7,128	6	\$1,175
		linkedin	\$37,241	3	\$21,602
		organic	\$1,636,860	206	\$8,505
	ppc	google	\$7,634,076	426	\$18,899
	social-paid	facebook	\$548,414	25	\$16,748
		linkedin	\$183,138	13	\$11,890
	social	email	\$0	10	\$0
		facebook	\$14,560	6	\$2,123
		li	\$5,371	12	\$8,275
		linkedin	\$602,204	196	\$3,842
		linkedin?es_p	\$23,446	2	\$10,597
		...	\$50,775	1	\$50,775
		twitter	\$240,073	28	\$9,794

PIPELINE REPORTING

Campaign Reporting

- UTM Medium data on Campaign Member reporting enables you to see which mediums used in that campaign are driving the strongest results

Pipeline by UTM					
Campaign Name	UTM Medium	Total Attribution Amount	Opps Influenced	Avg Opp Size	
Grand Total		\$7,434,418	669	\$13,237	
2018-01-01 to 2018-12-31 Web	banner	\$14,449	5	\$2,243	
	cpc	\$1,981,407	18	\$97,322	
	direct	\$17,098	18	\$1,693	
	email	\$243,874	11	\$28,841	
	ppc	\$34,034	17	\$16,747	
	seo	\$155,982	25	\$18,008	
	social	\$18,185	4	\$4,674	
2018-01-01 to 2018-12-31 Triple Crown	direct	\$37,241	3	\$22,676	
	email	\$686,406	165	\$4,375	
	seo	\$0	3	\$131,550	
2019-01-01 to 2019-12-31 GLOBAL-ALL White Paper	banner	\$0	1	\$3,977	
	cpc	\$0	2	\$0	
	direct	\$166,781	32	\$4,095	
	ppc	\$648,261	53	\$8,362	
	social	\$449	10	\$45	
	social-paid	\$0	1	\$5,867	



*Champion Tip: 129 G2 results for “Attribution” with the list growing every day. New tools are constantly emerging, so do your research. Not all Attribution Platforms are created equal.

IN REVIEW...



Key Takeaways

1

Locate the data and create a strategy for managing it across your whole system.

2

Identify the data that is missing and build processes for generating it moving forward.

3

Set regular reporting intervals on the data and move toward data driven decision making.

Q & A

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THANK YOU



