



CHECKLIST

Gear up for your strategic business review.

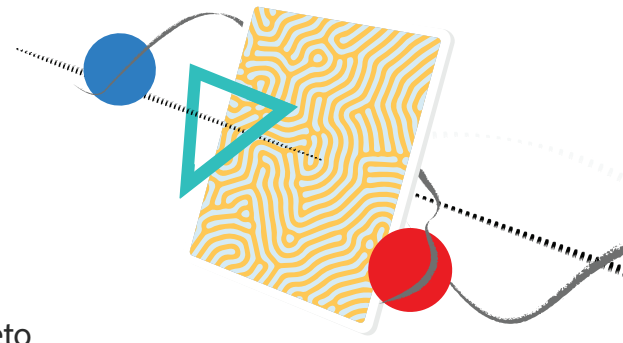
Use this checklist to prepare for and guide the conversation with your Adobe SAM about winning with Adobe Marketo Engage.



A strategic business review (SBR) is available on an annual basis to all Adobe Marketo Engage customers. Led by your Adobe success account manager (SAM), the SBR is a guided evaluation of your marketing automation goals and progress toward attaining them. It also includes helpful recommendations from Adobe for addressing any trouble spots and building on already-impressive results.



Step 1: Review last year's goals and results.



Review what you hoped to accomplish with Adobe Marketo Engage over the last 12 months. These can be process-oriented goals, such as “launch more campaigns,” or results-oriented goals, such as “increase customer engagement” or “boost sales volume.”

For each goal, you'll want to answer the following questions:

- What did we want to accomplish and why?
- Which metrics did we track?
- Where did we start last year?
- Where are we today?

For example, if your goal was “launch more campaigns,” your answers might look like this:

- We wanted to launch more campaigns to grow our pipeline.
- We looked at how many campaigns we could launch in a quarter and how many marketing qualified leads (MQLs) we generated.
- In Q2 2020, we launched 8 campaigns and generated 20 MQLs.

Step 2: Identify goals for the future.

Think about what goals you would like to achieve with Adobe Marketo Engage over the next year or so.

For each goal, you'll want to consider:

- What do we want to accomplish and why?
- How will we measure our success?
- Where are we today?
- Do we understand how Adobe Marketo Engage can help us achieve these goals?
 - If not, what kind of help do we need?

Step 3: Make a list of questions for your Adobe SAM.

Your SBR is an opportunity to get answers from Adobe on your organization's top priorities. Now is the time to pull together your team's questions about Adobe Marketo Engage and how the solution can do more for your business.

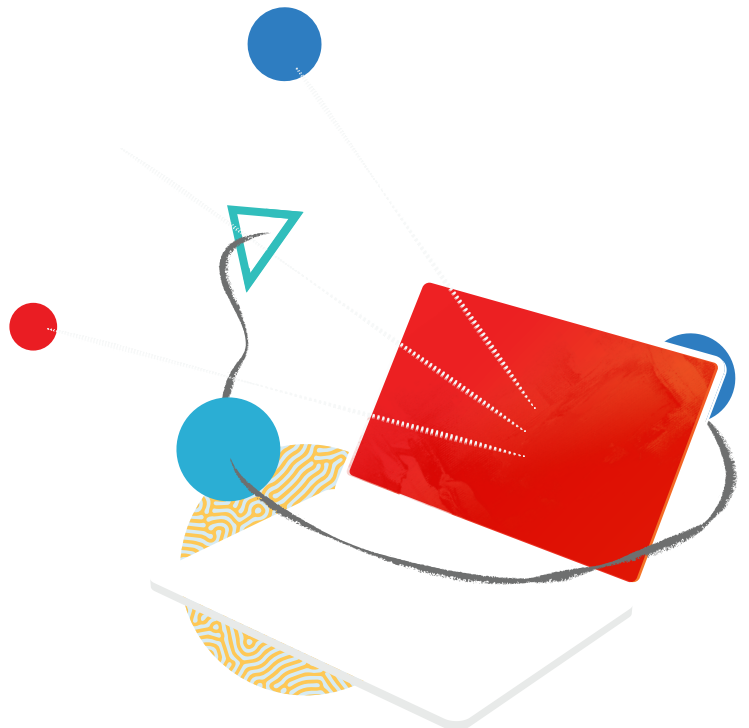
While every organization has its own unique concerns, some commonly asked questions are:

- How can we improve the ROI of our Adobe Marketo Engage platform?
- Are there features that could help that we aren't using?
- How can we take advantage of new AI-powered features like predictive content and predictive audiences?
- Are there strategies that other companies like ours are succeeding with?
- Are there other Adobe products that can help us meet our goals?

Step 4: If you haven't already, book your SBR session.

We suggest scheduling your SBR roughly six to nine months before the end of your current license, as this will give you a meaningful window of progress and data to consider.

To get your next SBR on the calendar, simply reach out to your Adobe SAM. If you're not sure who your contact is, get in touch with customer support at support@marketo.com.



About Adobe Marketo Engage

Adobe Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Adobe Marketo Engage.



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