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# MOVING TO MARKETO

## ACCELERATE YOUR ROI WITH A SEAMLESS MIGRATION

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# Why the Time is Right

If you're reading this, you've likely run into challenges with your current marketing automation platform. Perhaps outdated or complex functionality makes the simplest workflows cumbersome to create and edit. Maybe your marketing team relies heavily on technical users to get campaigns or even an email out the door. It's possible you're frustrated with the pace of product innovation on increasingly-critical enterprise marketing capabilities, like account-based marketing or artificial intelligence applications. Or, it may simply come down to the quality of support you receive from your marketing technology partner.

Marketing is hard and marketers are busy. So, we buy marketing automation software to help. But, without a technology partner who knows the market, the marketer, and your product needs, and without time-saving capabilities built into a solution that's easy to use and doesn't require in-depth technical support, you won't achieve the best results. Worse, you may be putting your organization at a disadvantage. If you don't make the move to a solution that empowers your team, you risk falling behind your competitors and your peers.

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# Why Your Industry Peers Agree

Marketo's industry-leading marketing automation solution – Marketo Engage - offers the perfect combination of scale, speed, and ease of use to even the largest enterprise organizations. It is the choice platform of marketing and technology executives in thousands of companies around the world; these companies rely on Marketo to make billions of marketing touches each year. Marketo was named a leader based on completeness of vision and ability to execute in the Gartner Magic Quadrants for Multichannel Marketing Hubs (2019) and CRM Lead Management (2018) and is steadily outpacing competitive solutions in innovation. In the TrustRadius report, our customers rate Marketo as the #1 solution for enterprise companies.

*"Its ease of use/user experience coupled with performance and capabilities that make Marketo the clear-cut winner. A true differentiator is that Marketo was built for marketers. Other tools out there were built for developers. With Marketo, I spend my time marketing, but other tools on the market require you to know javascipt, table scructure, and other technical skills. All you need to master Marketo is a willingness to learn it, and the time do so, which makes it easiest to get results from."*
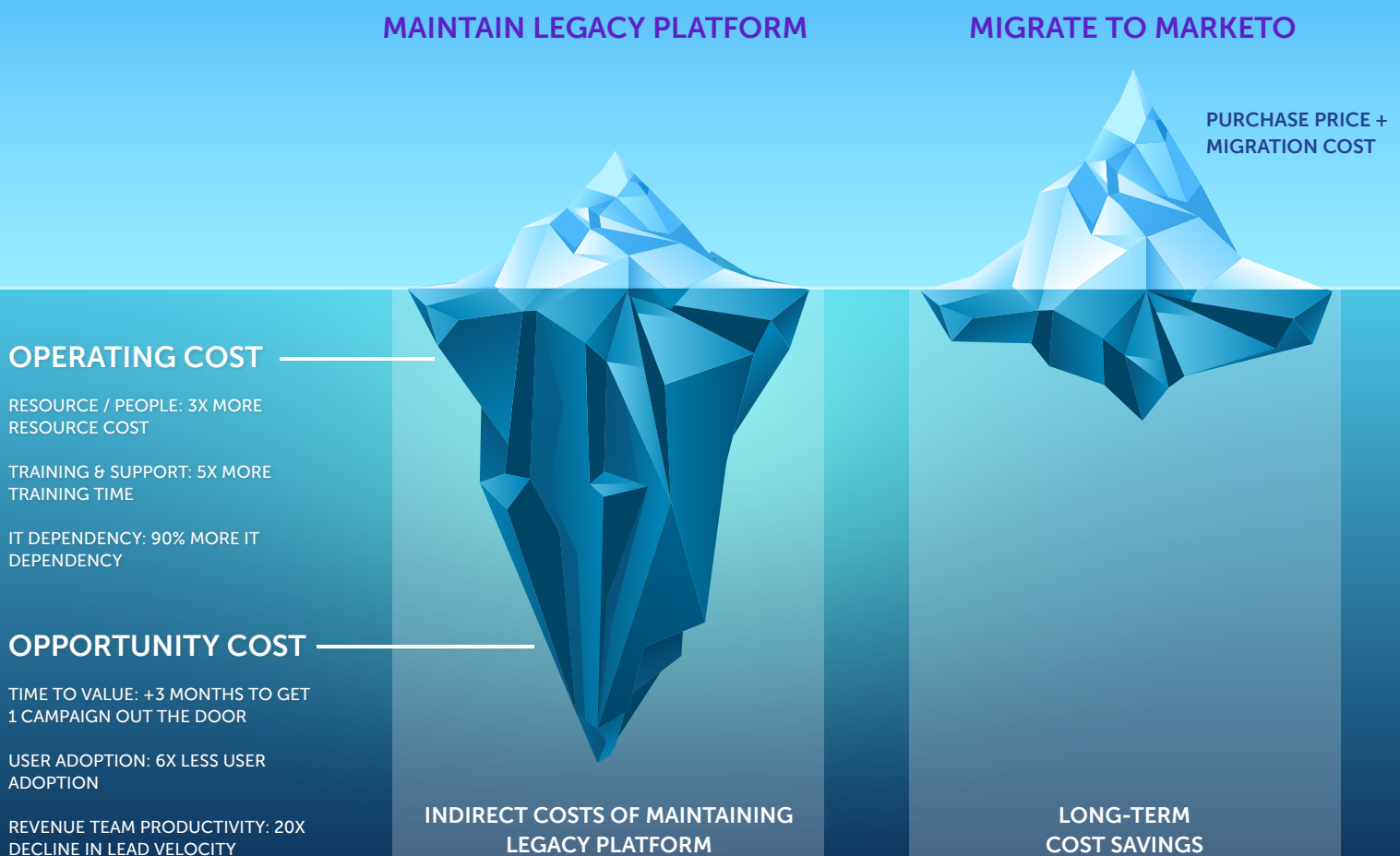
## — GARTNER PEER INSIGHTS CUSTOMER REVIEW

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# Justify Your Migration with Financial Proof

Your decision to migrate to a new marketing automation solution is an important one. However, in some cases the benefits and efficiency gains, no matter how great, may not be enough to justify buy in from extended stakeholders.

Your marketing automation solution is central to your business and will determine how successful your enterprise will be at driving long-term revenue and growth. The financial impact your decision will have should be carefully considered with longevity top of mind. The most comprehensive way to analyze and justify your migration is to compare the cost of continued operation of your legacy platform to the costs and benefits of migration to a new platform—or the total cost of ownership (TCO) for each. This calculation should encompass all relevant financial factors including purchase price, operating costs and opportunity costs associated with each option.

Here you can see a real-life example of data gathered from previous customers migrating to Marketo. While the decision to maintain your legacy platform may appear as the better option upfront, there are imbedded operating and opportunity costs that should be considered and are especially important over the long term.

## MAINTAIN LEGACY PLATFORM                    MIGRATE TO MARKETO

PURCHASE PRICE +
MIGRATION COST

### OPERATING COST

RESOURCE / PEOPLE: 3X MORE
RESOURCE COST

TRAINING & SUPPORT: 5X MORE
TRAINING TIME

IT DEPENDENCY: 90% MORE IT
DEPENDENCY

### OPPORTUNITY COST

TIME TO VALUE: +3 MONTHS TO GET
1 CAMPAIGN OUT THE DOOR

USER ADOPTION: 6X LESS USER
ADOPTION

REVENUE TEAM PRODUCTIVITY: 20X
DECLINE IN LEAD VELOCITY

**INDIRECT COSTS OF MAINTAINING
LEGACY PLATFORM**

**LONG-TERM
COST SAVINGS**

# If you're considering a move from your legacy platform to Marketo Engage, you've got many things to look forward to.

## SUPPORT ENTERPRISE GROWTH

Now, more than ever, companies are looking to marketing to scale customer acquisition and fuel revenue growth and prove marketing's impact on revenue. With the right marketing automation platform, access to open APIs, and freedom to integrate with over 500 best in class partner apps, you'll have the freedom to choose the right ecosystem to most effectively engage your customer and empower your team. Marketo serves as the growth engine and platform of choice for about two-thirds of the companies on the JMP Securities—100 Best Privately Held Software Companies list, enabling them to maximize the value of each customer and prospect relationship.

## INCREASE TIME TO VALUE

Marketo's unique combination of ease-of-use, power, and sophistication helps marketers drive immediate value. Built with time-saving functionality and user experience in mind, Marketo enables marketers to improve productivity and remove the need for internal technical support. Rich features like cloning and tokens, drag-and-drop filters, and editable templates make it easy to create, modify, and replicate even the most complex, multi-channel campaigns—an activity that often takes hours of manual work and expensive development resources to complete on other marketing platforms.

A unified user experience across all functions allows your team to work in one place versus having to jump around different areas of the application. And efficiencies extend well beyond your marketing team: real-time, deep integration with other key business systems like your CRM platform can provide timely, prioritized, and actionable insights for your sales or acquisition team to maximize their output, too.

*"We needed a powerful marketing automation system that could drive higher return on investment, support our expansion into new markets and enable our marketing team to do more with less. We selected Marketo not just because of all the things the platform can do, but because Marketo has a very deep sector expertise in marketing as a discipline. They understand marketing and marketers' needs. They're not just an IT application vendor. In addition, we wanted a Marketing automation tool that was easy enough for an average Marketing Manager to understand and use. We did not want to have to demand the support of the IT Department."*

### — STEPHEN YEO

MARKETING DIRECTOR FOR PANASONIC SYSTEM COMMUNICATIONS EUROPE

## MASTER COMPLEXITY WITH EASE

Customer journeys are not linear and marketing campaigns must adapt to the many different paths customers take. Over time, as your campaigns scale for longer life cycles and increasing complexity, flows can quickly become challenging to manage and easy to break. Marketo is closely tuned to the way marketers engage with customers today. With Marketo, non-technical users can quickly create sophisticated nurture campaigns with ease. More importantly, instead of being restricted to linear, predefined campaigns that fail to adapt to changing customer journeys, Marketo adapts to the customer-controlled journey in real time.

## PRACTICAL ARTIFICIAL INTELLIGENCE (AI) AT YOUR FINGERTIPS

Today's customer is most effectively engaged when their experience is as personalized and valuable as possible. In fact, it's increasingly the only way successful companies break through the noise. For marketers, that means driving personalization with thousands—or even millions—of prospective buyers across all channels. There's a clear challenge for most teams to scale to those expectations; hand-tuning campaigns to that extent isn't possible. Marketo's ongoing investment in adaptive campaigns—personalized ad campaigns driven by the marketer and AI working together—helps marketers rise to meet the challenge today. While most legacy platforms offer no concrete AI investment strategy or vision, Marketo customers can currently adopt Predictive Content as a tangible step toward using AI to optimize the content they offer prospects through email and web.

## MAXIMIZE YOUR ROI WITH CLOSED LOOP REPORTING

Migrating to a new Marketing Automation solution provides a terrific opportunity to assess what is working, what is underperforming, and where you can improve—whether it's optimizing spend or increasing return from your marketing efforts. Just like when you're moving to a new house, moving platforms offers a chance to figure out what is valuable, purge what you don't need, and design your future with an eye toward doubling down on what really works. Even more, the combined product strength of Marketo and Bizible provides marketers enhanced visibility into full funnel analytics, from campaign planning through to execution and revenue, enabling teams to more intelligently spend their budgets and only invest in things that offer them the greatest marketing returns.

## JOIN A PASSIONATE COMMUNITY

Marketo provides an account manager as a partner focused on your success. We also have an award-winning Customer Support organization committed to helping you succeed. Regardless of the tier of support you choose, you get easy access to our technical resources for fast answers and technical assistance.

The Marketing Nation, our community of more than 60,000 marketers and digital marketing thought leaders, is a great place to get new ideas and share best practices. And, with a solution like Marketo, you've got an ecosystem of LaunchPoint partners that offer hundreds of applications to help you extend the capabilities of your system so that you're poised for future growth. Even better, you don't have to go it alone or lose any momentum as you make the switch. Marketo provides all the tools and guidance you need to put you on the fast track to better marketing results.

# QUANTIFY THE UPSIDE:
# HOW MUCH TIME WILL YOUR TEAM GAIN?

**Use the worksheet below to time yourself or your team on how long it takes to compete these every-day marketing tasks with your current platform – then compare it to the time it took us to complete with Marketo.**

| Activity | Do it with Marketo | Our Time | Your Time |
|---|---|---|---|
| **Build a landing page with a 5-field form**<br><br>Example: a registration landing page for an upcoming webinar | Robust, fully-responsive landing page capabilities that leverage drag-and-drop design with WYSIWYG editing make it easy to create effective landing pages that look great on any device – without need of technical assistance! | **5 Minutes** | |
| **Create an invite email and reminder email**<br><br>Link this to the registration landing page | Drag and drop, modular layout makes it easy to navigate and quick to customize all aspects of our ready-to-use templates including color, style, imagery, dynamic content etc. | **3 Minutes** | |
| **Segment your invite email based on 3 criteria**<br><br>Example: Executive Role, lives in Virginia, Downloaded your ROI whitepaper | With easy to use drag-and-drop filters, Marketo smart lists allow you to quickly define exactly who you want to target based on role, geography, and behavior. Avoid extra clicks, new windows and redundant steps that come along with the everyday task of creating new segments. | **30 Seconds** | |
| **Select different emails for multiple groups**<br><br>Example: Send 3 different emails to registrants depending on their job title | Adding campaign constraints that go beyond a simple yes/no is a core task for most marketers. Marketo makes it quick and easy to drag and drop these constraints without having to do yes/no decisions for each piece, wait step, etc. | **1 Minute** | |

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| | | | |
|---|---|---|---|
| **Pull together the above assets into a campaign** | Marketo's campaign flow set up provides a clear line of sight making it possible to master complexity without losing ability to scale as campaigns grow over time. This set up provides flexibility needed to deliver non-linear engagements by listening for and responding to new customer behavior. | **10-15 Minutes** | |
| **Replicate the campaign for 3 other uses** <br><br> Example: Clone the same program for 3 separate webinars | Program level cloning is unique to Marketo and allows you to avoid unnecessary days of re-creating work. In a matter of seconds, replicate even the most complex programs (including tags, tokens, and content) while using tokens to customize individual assets. | **8-10 Minutes** | |
| **Create a trigger to notify sales of leads who fill out the registration form** | Interesting moment flow steps give your sales team visibility into the cool things your leads are doing. Instantly define the activity and set the trigger to notify your sales team in just 2 steps. | **1 Minute** | |
| **Add a third email to the middle of your stream** | Add, remove or re-order any content pieces in an engagement stream and Marketo will automatically make sure everyone in the stream gets the most recent content then resumes back to where they were. Do this without the need of re-white boarding the process, disconnecting existing campaigns or having to worry about sending duplicate content. | **5 Seconds** | |
| **Create a lead score rule: + 5 points for all leads who registered** | Creating a new scoring model in Marketo takes just a few clicks. With drag-and-drop fields quickly build scoring rules based on behavior, demographic and firmographic data. Multiple scoring models are a snap with cloning for global organizations, multiple business units, or product lines. | **5 Seconds** | |
| **Determine the total revenue contributed by webinar programs last year** <br><br> Or choose a similar program such as tradeshows or digital advertising | Save time number crunching with Marketo's Program Analyzer and get quick insights into pipeline, revenue and ROI first-touch and multi-touch attribution. | **3 Minutes** | |

How much time did you get back? What could you do with this extra time on your hands?

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# Ready to make your move? Here's what to do next.

**You wouldn't consider moving from one home to the next without a game plan. In your professional life, this move is just as momentous. With that in mind, here are some tried-and true steps for a fail-safe marketing automation solution migration:**

1. **Treat it like a project.** Assign a project manager and identify stakeholders across your IT, marketing, and sales organizations (if applicable). By engaging the right team members from the get-go, you'll move more rapidly through the migration steps and be better aligned throughout the process. Plus, a project manager overseeing the migration will help coordinate steps and keep it on track.

2. **Outline your future goals.** Because most migrations are focused on enabling a better future, now is the time to document your vision and the related goals. To that end, meet with your team and stakeholders to ensure you consider everyone's perspectives on how you want to evolve your marketing capabilities, including priorities versus nice-to-haves. That way, you can align the move with your needs and focus on your goals—for today and tomorrow.

3. **Plan the migration.** Map out a workable plan and timeline for migrating the essentials so you can carry on day-to-day activities without interruption. Then, you can think about what to add and when to fuel new programs and campaigns. Hand in hand with this, consider how to take advantage of Marketo's best practice program templates.

4. **Get a holistic view of your MarTech stack.** If your organization is like many, you've made marketing automation the heart of your marketing technology stack. That's why it's essential to take an inventory of your systems—such as webinar platforms, web analytics, customer relationship management (CRM), and content management systems (CMS)—that integrate with your marketing automation hub (or that you'd like to integrate). With an accurate map of your current tech stack, you can develop an integration project plan. For businesses with a CRM system, remember to audit the objects and fields in your current marketing tool and CRM system and plan your data migration strategy for both CRM and non-CRM data. This will help you plan your data flows, understand your API call requirements, and avoid running into any surprises when you make the switch.

5. **Clean up your assets.** Figure out which elements of your existing platform and tools you need to see reflected in Marketo and which you can and should leave behind. As part of that, inventory and prioritize the migration of your assets (e.g., forms, landing pages, and emails), campaigns, processes (e.g., demand generation, nurturing, and customer lifecycle), and data (e.g., audience segment lists and lead scoring). Then, evaluate their cleanliness—now's the time to clean them, if necessary.

6. **Choose migration services to help streamline and accelerate your efforts.** Marketo offers a guided migration service for basic advice and direction to help your team work through migration activities. For those who want additional help, we offer more extensive professional services that include roadmap development and hands-on migration activities.

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# KEY QUESTIONS TO ASK
# ABOUT MIGRATION SERVICES.

**Changing platforms in the enterprise is a project, but proactive planning can make it a smooth one. Below is a list of questions to ask your vendor about migrating and a worksheet that will help you prepare for a successful migration.**

- Do you have an internal services organization to help us, or do you outsource client migrations?

- Based on our use case, do you think a third-party partner would be better for our implementation? If so, do you have recommendations?

- Can we use some of our own resources to assist with migration activities to control costs?

- Are there resources available to help us plan our migration and/or provide hands-on help?

- How many customers have you moved from (insert vendor's name) platform to Marketo?

- Can you provide customer references we can speak to?

- Does your implementation package/service include migration consulting?

- How flexible is your migration service's scope?

- How will you support our particular use case?

- How do we manage migration across divisions /or product lines (workspaces & partitions)?

- Can you help us to keep the engine running through the migration?

# 3-STEP MIGRATION PLAN

**Migration timeframes will vary depending on your specific use case and needs. However, there are certain steps you'll take along the way. Here is a typical migration plan with three tangible steps: content, data, and programs, and everything you might consider moving or building in each.**

## Step 1: Content

Create landing pages and validate built landing pages in Marketo

Build forms for web integration (iframe, embedded form, API)

Test forms to confirm data for all fields are inserted into Marketo

Import images into Marketo

Import PDFs into Marketo

Import HTML code of emails into new emails within Marketo

Test emails (send samples) to check links and display

## Step 2: Data

Import unsubscribe list (CSV)

Import data (marketing ONLY data)

Create suppression lists

Build the following:

- Core and target segments
- Relevant product lists
- Relevant regional lists
- Relevant business unit lists
- Logic to add new leads to your lists

## Step 3: Programs

Define: Lead partitions & workspaces

Channel & tag discussion

Define interesting moments

Discuss PPC/ Digital Marketing plan

Review scoring program

CRM integration

Review flows and associated content to be migrated

# HIT THE GROUND RUNNING WITH A BEST-IN-CLASS SUPPORT SYSTEM

**We're sure you're excited to elevate your marketing with Marketo. To optimize your use of Marketo Engage and drive value, we strongly recommend you observe the following best practices.**

## TAKE FULL ADVANTAGE OF AVAILABLE IMPLEMENTATION SERVICES

As you implement Marketo Engage, our onboarding services help you develop your instance(s) in a way that makes the most sense for your organization.. Though you may not need to start from scratch, questions will come up as you learn about new features and capabilities. Use your time with our consultants during your implementation and onboarding for coaching and hands-on guidance from Marketo certified experts.

## GET TRAINED ON MARKETO ENGAGE

If you're migrating from another marketing automation platform you may be a more advanced user, but you'll still need to learn the ins and outs of Marketo Engage and get hands-on experience using it. Take advantage of our comprehensive training options to get an overview of the basics and terminology for features and concepts in Marketo Engage, or build upon skills you already have through our more specialized courses.. Visit Marketo University to review on-demand or in-person training courses or University Online for free training videos to get you started. Also, check out the resources section of our website for access to definitive guides, ebooks, recorded webinars, and other educational assets that can spark ideas about ways to use your new product.

## RACK UP SOME QUICK WINS

To quickly momentum and support, consider starting with simpler campaigns, like one-off emails, and work up to more sophisticated programs. This will help you get up to speed with Marketo and its features. By the time you're ready for more elaborate campaigns, you should have a good feel for how Marketo works and ideas for streamlining or otherwise improving your complex campaigns.

For help along the way, our Professional Services teams provide several solutions, from the more tactical Expert Services, to more strategic Deliverability Consulting and Strategic Engagement Services.

## PLAN AHEAD FOR A REVIEW AND OPTIMIZATION

At the 9-to-12-month mark, you may want to engage Marketo to review your MAP instance and campaigns for guidance on how to get the most from all your migrated programs. This is also a good time to check in on best practices and get recommendations for continuous optimization.

*"We went from a two year long effort rolling out Eloqua that didn't go anywhere to signing with Marketo in one month and four months later rolled out globally to three regions and over 40 marketers"*

**— CHRIS ROECKL**
VP OF WW FIELD MARKETING, PULSE SECURE

# GET INSPIRED BY INDUSTRY PEERS WHO HAVE GONE BEFORE YOU

It's one thing to read about the best approach to a migration; it's another to see how it's gone for others.



## A Smooth, Seamless Transition to Marketo

VersionOne's platform helps small, midsize, and large companies accelerate software delivery and increase business agility. The Director of Marketing Operations, Kristen Wendel, made dramatic changes to VersionOne's digital marketing strategy for enhanced agility and scalability of marketing campaigns, including replacing their legacy marketing automation tool with Marketo. VersionOne worked with Marketo to implement a platform that would enable broader transformation towards operational excellence and enterprise-focused marketing programs.

Kristen's major concern was how the migration would impact current processes, especially those involving VersionOne's free software trials, a key source of leads. Marketo suggested an approach that supported legacy processes while building and testing the infrastructure and updated processes underneath. This approach not only smoothed the transition but also enabled VersionOne to build a new freemium trial flow. The Marketo consultant configured a dynamic landing page with multiple forms for the trial validation process in less than an hour. This same functionality took months to develop with the previous solution. As Peter Herbert, Vice President of Marketing, put it,

*"Marketo turned months into minutes."*

*"Marketo partnered with us every step of the way, enabling us to seamlessly complete our migration in just three months. Marketo consultants led the full implementation, including database synchronization, programs setup, lifecycle and lead scoring models, channel definitions, lead source appending, modelers, and Revenue Cycle Explorer reporting."*

**— KRISTEN WENDEL**

DIRECTOR OF MARKETING OPERATIONS, VERSIONONE

**recall**™

# Going Global with Marketo in Just Over 3 Months

When Recall Holdings Limited—a global information management company— needed a technology platform to support its global requirements and digital marketing transformation, it chose Marketo. Working closely with Marketo, Recall developed a center of excellence that serves as a central hub for their marketing collaboration and resources. In addition, Marketo and Recall established a global training program to ensure rapid user adoption. In just over three months, Marketo helped Recall successfully onboard its marketing team through on-site trainings in each market, helping align teams across 25 countries to support the company's digital transformation.

*"Marketo was a real co-partner for us, approaching our planning, adoption, and implementation with a vested interest in Recall's success."*

## — RON MCMURTRIE
SENIOR VICE PRESIDENT AND GLOBAL CHIEF MARKETING OFFICER, RECALL

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# CONCLUSION:

## DON'T WAIT TO GET ON THE PATH TO BETTER RESULTS

You'll be in good hands as you begin migrating from your marketing automation platform to Marketo. With over 5,000 deployments worldwide, our team has deep expertise with a wide variety of use cases and best practices. The organizations that have already made the switch have realized numerous benefits, including greater efficiency, ease-of-use, support and revenue impact, to name a few.

Remember: there's never a perfect time to roll out new software or start a new project. You'll always be busy. But the longer you wait to initiate a migration, the longer you'll have to wait to see your revenue move up and to the right. Now that you know you'll benefit from the switch, you can fully convey the opportunity cost of your current platform and communicate a plan to realize more value from a solution that fits your long-term needs. The sooner you get started, the sooner you'll begin incorporating the value of Marketo into all of your programs—so your team can do more and achieve better results.

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Marketo, an Adobe company, offers the solution of choice for lead management and B2B marketing professionals seeking to transform customer experiences by engaging across every stage of complex buying journeys. Natively supporting both lead and account-based marketing strategies, Marketo Engage, as part of Adobe Experience Cloud, brings together marketing and sales in a comprehensive solution designed to orchestrate personalized experiences, optimize content, and measure business impact across every channel, from consideration to conversion and beyond. To learn more about Marketo Engage, the vast community of passionate marketers in the Marketing Nation, and Marketo's robust partner ecosystem, visit **www.marketo.com**.