

LEADOUS



MARKETO TIPS AND TRICKS

Helping organizations grow their pipeline
by improving marketing automation strategies



Strategy



Audit



Marketo
Services



Database
Analysis



Reports &
Analytics



Design

“LEADOUS changed the way we market. Their strategic insight helped our team truly maximize our use of marketing automation with Marketo to meet our sales targets.”

- CMO, Sport Ngin

Marketo Tips and Tricks

Take it from the experts, the right tips and tricks will take you from Marketo novice to pro in no time. Here is the list of most popular tips we share with our clients:

- Turn on the Campaign Inspector to see what campaigns are active in your Marketo instance
- If your Smart Lists are moving slowly try reordering the criteria so Marketo is working more efficiently
- Use Smart Campaigns to automate database cleaning
- For personalization, create Tokens at the folder level to be used in any program within that folder
- Use Wait Steps to automate the time lapse in between your email sends. Use advanced Wait Steps to select a specific date or time for the next send
- Progressive Profiling in forms allows you to gradually get information from your customers
- Set up any desired custom fields in your CRM, then sync your CRM to Marketo. These updates will instantly flow into the Marketo lead record
- Type “NULL” into the Change Data Value flow step to completely remove any value
- To track operational campaigns, do not check the box when the email is created
- Set Communications Limits so your leads are not getting too many emails within a certain amount of time. Remember - operational emails will be sent regardless of Communication Limits
- Double and triple check your Smart Campaign flow steps. Flow steps can be modified after the campaign is activated ONLY if the leads have not yet reached that step
- You can clone individual assets or entire programs to save time on set up
- Use folders to stay organized - organize by date, program type, etc. - whatever makes sense for your company. Archive completed programs
- Sending plain text emails can increase deliverability
- When creating a behavior scoring campaign make sure leads can react to the campaign more than once in the Qualification Rules
- For Salesforce.com users be sure to choose the sync option at your program level