CHAMPION WORKSHEET

Defining Lead Sources

Created by Jessica Kao, Marketo Champion

Use this worksheet to clearly define your lead sources before implementing your Lead Source operational program in your instance. Be sure to document what it means to have a lead originate from each source, identify the filters you would use in producing your smart list for that source, and consider which additional lead source details you would capture in the Lead Source Detail field.

LEAD SOURCE	DEFINITION	SMART LIST CRITERIA	LEAD SOURCE DETAIL
EX: Online Advertising	Peope whose initial visit to a web page is from an online paid source. This can be from paid social such as LinkedIn, Twitter, etc. or purchased promotion from other 3rd party online sites that drive traffic to your landing page. This is usually indicated by UTM values or Original Referrer.	Original referrer would indicate that they are from paid sources in combination with UTM values.	Name of source and campaign {{lead.utm_source}}: {{lead.utm_campaign}}
EX: Organic Search	People whose initial visit to a web page are from Google, Yahoo, or Bing, etc excluding anything from paid sources from the same search engines.	Original referrer would indicate that they are from a search engine. Use UTM fields to exclude paid traffic from these same sources.	"Original referrer: search phrase (if it exists) {{lead.Original Referrer}}: {{lead.Original Search Phrase}}"
EX: Sales Generated	People that originate by being created directly in your CRM.	Original Source type = Salesforce.com or your CRM	Sales rep's email
EX: Tradeshow	People originating from a tradeshow.	Member of Program is any. Add constraint on Program statuses relevant to the tradeshow channel, and constraint on acquired by = true	Name of Program/Event

Now try this in Marketo Engage!

Take the lead sources you've outlined here and build out your lead source operational program in Marketo Engage.
Check out this video to get started.