

An aerial photograph of a complex multi-level highway interchange with several overpasses and ramps. A semi-transparent purple rectangular overlay covers the upper portion of the image, containing the title and logo. The background shows a cityscape and hills under a clear sky.

ROADMAP TO SUCCESS: Driving Results with Marketo





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Welcome to the Marketing Nation!

You're joining a community of more than 60,000 innovative marketers and digital marketing leaders who are taking charge of their marketing funnel, from attracting and engaging the right buyers to closing deals and creating advocates.

At Marketo, we are committed to your success. This quickstart guide will provide a solid framework of the tasks you'll need to complete to build effective, scalable campaigns that deliver measurable business impact. Keep in mind that this is an *ideal* framework. Managing all of these activities may not be feasible for every organization. The priority is to determine which of these activities are the most critical for your company.

With any new tool, there's a lot of information to learn—with that in mind, we've broken this guide into easy-to-navigate sections that will give you an overview of the core concepts that are essential to your success in the first few months and beyond.

Note: This guide includes a comprehensive list of different features; not all features may be applicable to your subscription or business needs. For more information about any of our products or services, please reach out to your Customer Account Manager for assistance.



Onboarding Requirements and Recommendations

Before you get the ball rolling, take a look at the steps below to make sure your Marketo instance is ready to go. If you've decided to have Marketo help with your implementation, your Marketo Consultant will guide you through each of these steps and ensure you stay on track.

Here are a few steps that you will complete over the next few months:



REQUIRED TASKS

Introduction Calls

- Welcome call with your Customer Account Manager, who is your main point of contact for your account needs.
- Kickoff call for your *Launch Pack* implementation service (if purchased). You'll meet your Marketo Consultant, who will help you with the initial onboarding of Marketo and be available to you for additional questions about services.

User Education

- Complete quick win exercises from the **"Getting Started"** section in Marketo Docs.
- Watch setup, configuration, and CRM integration on-demand videos (if applicable).
- Complete *Marketo Core Concepts Training* (previously called *Foundation Training*).

Marketo Production Setup

- Create production users.
- Configure authorized support contacts.
- Submit an email template request (for all *Launch Pack* users).
- Install a *Munchkin* code, Marketo's custom JavaScript tracking code, on your website.

Technical Setup to Ensure Email Deliverability and Consistent Branding

There are some technical aspects to onboarding with Marketo that will ensure you are set up for success. Here are the elements you need to have in place prior to launch:

- Configure *Sender Policy Framework (SPF)*, an email validation system, and *Domain Keys Identified Mail (DKIM)*, an authentication protocol used by email receivers to determine who an email was sent from and if it is authorized.
- Configure *CNAMEs* for both landing pages and emails. Choose a word to go at the beginning of the URL for your email URL links and landing pages. It should be just one word and relatively short, and will look something like this:
info.YourCompany.com/NameOfPage.html
- Enable IP Restrictions and enter IP addresses of Marketo domains that you want to whitelist, or allow access to.

CRM Sync (if applicable)

- Sync Marketo to your CRM. The very first sync in your subscription takes hours or even days because Marketo is copying the entire database from your CRM. After that, each sync typically takes seconds or minutes and only syncs data that has changed.



RECOMMENDED TASKS

Instance Organization

- Navigate Marketo applications and folder structures, and explore Marketo assets and features.
- Organize your programs with folders and use the proper naming schemes. [See our best practice recommendations.](#)
- Document your set-up in a playbook. As you build your playbook, make sure to include:
 1. Admin setup: workspaces, partitions, channels and tags, user roles, technical setup
 2. Governance: naming and folder structure, data management, subscription management
 3. Program and asset templates and the process for their creation
 4. Lead lifecycle and routing
 5. Program setup requirements
 6. Ongoing nurture streams or other programs
 7. Testing and reporting
 8. Integrations
 9. Resources
 10. Internal processes

Marketo Marketing Calendar

- Use *Marketing Calendar* to plan, organize, and communicate marketing plans across your organization in a single, unified view. Learn more in the recorded webinar, [Introducing Marketing Calendar from Marketo.](#)
- Issue or revoke a *Marketing Calendar* license.
- Navigate the *Marketing Calendar*: change between modes, use the agenda view, and navigate through time.

Marketo Moments

- Download *Marketo Moments* from the App Store or Google Play and learn how to use it to track campaign progress, make changes, and track results. Check out the [Understanding Marketo Moments](#) document for details.

Drive Results Down the Funnel

The ability to create a seamless, continuous experience across channels, and throughout the customer lifecycle, is marketing's responsibility—and you can deliver on it with the help of technology like Marketo.

Your marketing funnel represents your company's revenue model. It's essentially the internal version of the customer lifecycle, starting from when qualified buyers, or leads, first become aware of your business, to when they engage with your campaigns, to after they become a customer and beyond.

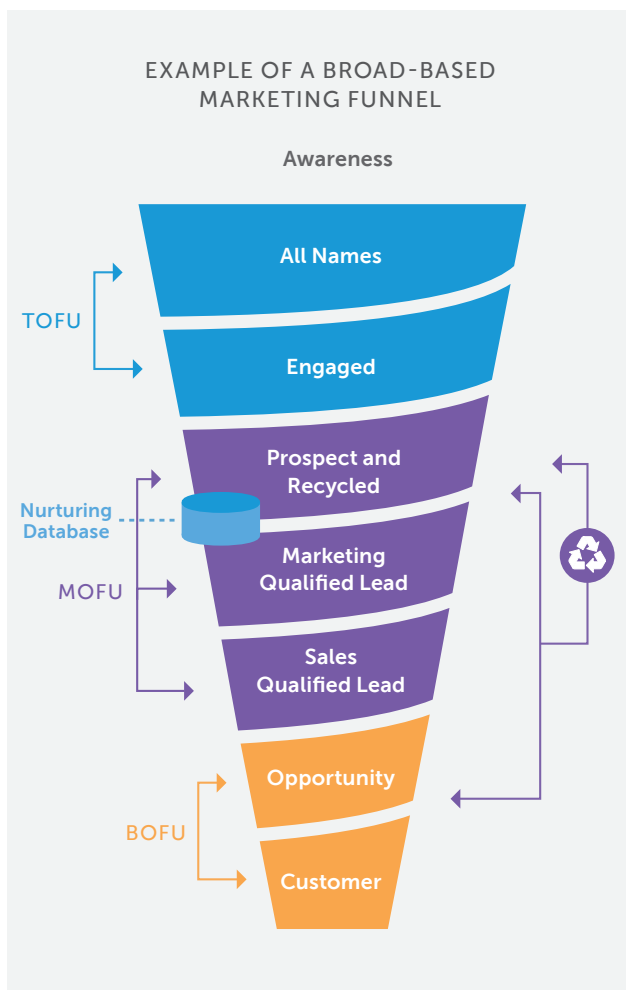
To attract the right people, nurture them until they're ready to purchase, and then deliver win-ready leads to sales, you need to understand how to optimize your campaigns for each stage of the funnel, which for most B2B organizations includes **top-of-funnel (TOFU)**, **middle-of-funnel (MOFU)**, and **bottom-of-funnel (BOFU)**.



Drive Results Down the Funnel

If your marketing strategy includes targeting specific accounts via account-based marketing (ABM), your revenue model may look different. Rather than applying a broad-based marketing approach as outlined below to engage your target accounts, you may use technology like Marketo ABM to identify key accounts that have strategic importance and focus your efforts on identifying and engaging with the right people within those accounts. With this targeted approach, you may find that your funnel is smaller on the top, but it will yield more qualified leads in the long run.

In either case, Marketo's robust marketing automation platform allows you to run, measure, and optimize your campaigns for your unique goals at each of these stages—with a focus on either leads (broad-based marketing), target accounts (account-based marketing), or both.



Funnel Management

To optimize marketing activities at each stage of the funnel, you will need to do the following things:

- Work with key stakeholders** in marketing and sales to define your revenue model with agreed upon stages, definitions, and handoff touchpoints.
- Establish common goals** with the sales team. Both marketing and sales should think about the funnel in terms of one process rather than different processes.
- Map the revenue model** in Marketo's *Revenue Modeler* to direct the rules in your marketing automation system for where a buyer is in their journey at any given time—based on their behavior across channels, engagement with campaigns, lead score, and data changes in your CRM.
- Understand how to use *Success Path Analyzer*** to visualize the movement of people through each funnel stage to see where leads may get stuck to focus your efforts on nudging them to the next stage.

WHAT TYPES OF GOALS SHOULD YOU FOCUS ON THROUGHOUT THE FUNNEL?

- Top-of-funnel goals** to drive awareness and acquisition
- Middle-of-funnel goals** to increase conversions and determine sales-readiness
- Bottom-of-funnel goals** to drive adoption, retention, and growth
- Compensation goals:** consider structuring compensation in a similar way for both marketing and sales to increase accountability
- Driving attendance at joint activities**, such as roadshows and luncheons

Top-of-Funnel (TOFU) Activities

Prospects in this buying stage are just entering your marketing and sales funnel. They are aware of your product or service, but may not be ready to buy. Your main objectives at this point should include attracting the right people (leads or target accounts), acquiring their names into your database, and educating them to build interest.



CHECK OUT THESE HELPFUL RESOURCES FOR MORE INFORMATION ON HOW TO GET STARTED WITH TOFU ACTIVITIES

Downloadable resources:

- ↓ [A Multi-Channel Marketing Workbook](#)
- ↓ [The 5 Principles of Engagement Marketing](#)
- ↓ [Email Deliverability](#)
- ↓ [The Power of A/B Testing](#)
- ↓ [The Definitive Guide to Lead Generation](#)
- ↓ [The Definitive Guide to Lead Nurturing](#)

Additionally, you can visit [Marketo University](#) for courses covering everything from marketing best practices to how-to instruction and tailored Learning Paths. And then you can review our [Product Docs](#), which include easy-to-follow documentation with step-by-step instructions and screenshots about Marketo's product features.

Attract New Business

Attract and generate demand with inbound and digital programs across different channels. Discuss how to set up campaigns for your current channels with your Marketo consultant. Looking to expand to new channels in the near-future? Your Marketo consultant can help you to map out a plan for that too.

Use this checklist to identify your current channels and plan for new channels:

| CURRENT MARKETING CHANNELS | FUTURE MARKETING CHANNELS |
|--|--|
| <input type="checkbox"/> Website | <input type="checkbox"/> Website |
| <input type="checkbox"/> Email | <input type="checkbox"/> Email |
| <input type="checkbox"/> Mobile | <input type="checkbox"/> Mobile |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Social Media |
| <input type="checkbox"/> Search Engines | <input type="checkbox"/> Search Engines |
| <input type="checkbox"/> Digital Advertising | <input type="checkbox"/> Digital Advertising |
| <input type="checkbox"/> Landing Pages | <input type="checkbox"/> Landing Pages |
| <input type="checkbox"/> Direct Mail | <input type="checkbox"/> Direct Mail |
| <input type="checkbox"/> Call Center | <input type="checkbox"/> Call Center |
| <input type="checkbox"/> Retail Store | <input type="checkbox"/> Retail Store |
| <input type="checkbox"/> Print | <input type="checkbox"/> Print |
| <input type="checkbox"/> TV | <input type="checkbox"/> TV |
| <input type="checkbox"/> Radio | <input type="checkbox"/> Radio |
| <input type="checkbox"/> Outdoor Advertising | <input type="checkbox"/> Outdoor Advertising |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

Acquire Names into Your Database

Convert traffic into marketable leads in your database. Drive conversions with customized landing pages and forms (including text, images, calls-to-action, and more) based on any criteria you need—location, industry, job title, etc.

Website/Web Forms

- Understand the different ways to integrate Marketo forms onto your website and their use cases:
 1. Marketo form on a landing page
 2. Marketo form embedded into iFrame
 3. Marketo form embedded using an embed code
 4. Non-Marketo forms using Marketo APIs
 5. Non-Marketo forms
- Create and use a form on a landing page to generate new names
- Learn how to dynamically toggle visibility of a form field and configure form progressive profiling
- Enable *Social Form Fill* to allow leads to fill out a form using their social network information

Webinars

- Consider connecting Marketo to a *LaunchPoint Event Partner* to automate your online events and learn how to create an event that integrates with the solution. These are a few commonly used event partners:
 1. Adobe Connect
 2. BrightTALK
 3. GoToWebinar
 4. InExpo
 5. On24
 6. ReadyTALK
 7. WebEx

Engage and Personalize Campaigns

Marketo is a comprehensive engagement marketing platform that allows you to understand buyer behaviors, affinity, and context across channels in a single data repository. Our platform enables you to engage buyers in a highly personalized way, build broader, more meaningful relationships, and manage, coordinate, and plan marketing activities across your team.

Email and Landing Page Templates

- Create emails and landing pages, including managing images, adding forms to landing pages, and personalizing emails with Marketo tokens. For information, visit the Marketo University and register for the *Building Creative Assets* course.

There are four options for building email and landing page templates in Marketo:

1. Work with your Enablement Consultant to get the initial starter templates included with your Marketo Launch Pack (if purchased)
 2. Download an email or landing page template from Marketo's template library ([templates.marketo.com](https://www.marketo.com)) or the Email Template Picker (see an [Overview of the Template Picker](#)).
 3. Upload your own custom template
 4. Engage Marketo Creative Services to build custom templates
- Understand the difference between free-form and guided landing pages.

Email Marketing

- Create and use *Smart Lists*, a mechanism throughout Marketo used to define which people to include from a report, list, or smart campaign, to target select audiences.
- Create a segmentation, define segment rules, group email reports by segmentations, and group lead reports by segments.
- Create an *Email Performance Report* to see how well your emails are performing with stats like delivered, opened, clicked, and more.
- Create an *Email Link Performance Report* to see how well the links in your emails are performing.

Content Personalization

- Understand how to use dynamic content to automate customization of emails and landing pages based on your desired audience.
- Create and edit snippets within dynamic content.

Email Deliverability

- Understand different types of unsubscribes in Marketo (some of these need to be configured): unsubscribed, marketing suspended, email suspended, blacklisted.
- Know the difference between a hard bounce and soft bounce and how to use the *Email Performance Report* to track them.
- Learn how to use Marketo's *Email Deliverability* tool to evaluate an email's deliverability before you send it. (Not all instances have the Email Deliverability Tool. Contact your sales rep for more information.)

A/B Testing

- Understand the different email testing options in Marketo and how to add them: *A/B Testing* is for one-time emails and *Email Champion/Challenger Testing* is for ongoing emails.
- Use *Landing Page Test Groups* to pick the most compelling option.

Nurture TOFU Leads

- Understand the basics of nurturing leads with Marketo's engagement engine, which allows you to boost lead quality by building trust and educating leads with consistent marketing communications across channels and throughout the sales cycle.
- Create nurture streams, set engagement cadence, edit and archive content, and understand how to find leads who have exhausted content or, in other words, received every piece of content in a stream.
- Create an engagement program to run email nurturing campaigns. Content sent to top-of-funnel prospects should be fun, entertaining, and educational to build interest in your brand.
- Track nurture campaign results in the *Engagement Dashboard*, which includes the *Engagement Score*. See how your content is performing in the *Engagement Stream Performance Report*

Other applications you might have added on to your Marketo solution to power Lead Management include:

Web Personalization (requires the Web Personalization application)

- Learn the basics of *Web Personalization* and how to create a campaign.
- Identify different use cases:
 1. Product interest
 2. Buying history
 3. Vertical/market segment
 4. Targeted name accounts
 5. Sales cycle stage/score

Mobile Marketing (requires the Mobile Marketing application)

- Create and send in-app messages to engage with your audience while they're using the app.
- Create, edit, configure, and send push notifications to mobile devices.



Middle-of-Funnel (MOFU) Activities

Prospects in this buying stage have the right demographics and behavior, have engaged with your content or offers, have displayed buying intent, and are potentially sales opportunities. Your goals at this point should include accurately scoring leads based on interest and fit and routing them to the sales team when appropriate.

Prioritize Leads, Customers, and Accounts

By scoring leads based on the interest they show in your business, their current place in the buying cycle, and their demographic fit, you can help make sure that your sales reps are talking to the right people at the right time.

- Work with sales to agree on the scoring model for leads and accounts (e.g. MQL score, SQL score) based on fit, demographics, interest, behavior, strategic importance, etc. At what score does a prospect get routed to sales?
- Work with the sales team to determine whether any other indicators should be factored into the scoring criteria.
- Validate your scoring model. Are all your campaigns running? What does your scoring footprint look like? What are high value attributes and activities most closely associated with buying behavior? Check your values to see if they align.



CHECK OUT THESE HELPFUL RESOURCES FOR MORE INFORMATION ON HOW TO KICKSTART YOUR MOFU ACTIVITIES

Downloadable resources:

-  [Jumpstart Revenue Growth with Sales and Marketing Alignment](#)
-  [The Definitive Guide to Lead Scoring](#)
-  [The Definitive Guide to Lead Nurturing](#)

Additionally, you can visit [Marketo University](#) for courses covering everything from marketing best practices to how-to instruction and tailored Learning Paths. And then you can review our [Product Docs](#), which include easy-to-follow documentation with step-by-step instructions and screenshots about Marketo's product features.

Align with Sales

As your marketing efforts begin bringing in more leads, you'll want to be sure that you're aligned with sales so that both teams know exactly when the handover between marketing and sales will occur. You'll be responsible for preparing the sales team with the necessary information and content to continue to add value to existing relationships with leads.

Sales Insight

- Install the *Marketo Sales Insight* app to Salesforce/Microsoft Dynamics.
- Learn how to issue a *Marketo Email Outlook Add-In* license.
- Install *Marketo Insights* for Google Chrome.
- Marketo Sales Insight* picks your best leads and contacts based on their priority. Both marketing and sales should understand the two components of a lead or contact's priority—urgency and relative score.
- Understand how to use *Interesting Moments* to give your sales team visibility into your leads' actions.

Nurture MOFU Leads

- Create an engagement program to run email nurturing campaigns. Content sent to middle-of-funnel prospects should be educational, engaging, and drive toward a goal to build interest in your product or service.
- Track nurture campaign results in the *Engagement Dashboard*, which includes the *Engagement Score*. See how your content is performing in the *Engagement Stream Performance Report*.

Bottom-of-Funnel (BOFU) Activities

Prospects in this buying stage are in the process of evaluating their purchasing decisions. At this point, your sales team will primarily be in charge of creating and closing new opportunities. You'll now want to focus your efforts on customer onboarding, retention, and growth. You'll still be responsible for providing sales with the right content, such as case studies.



Nurture BOFU Leads

- Create an engagement program to run email nurturing campaigns. Content sent to bottom-of-funnel prospects should be educational, informative, and be very specific to your product or service area to support the buyer during the purchase process, such as case studies or success stories.
- Track nurture campaign results in the *Engagement Dashboard*, which includes the *Engagement Score*. See how your content is performing in the *Engagement Stream Performance Report*.



CHECK OUT THESE HELPFUL RESOURCES FOR MORE INFORMATION ON BOFU MARKETING

Downloadable resources:

-  [Customer Base Marketing: How to Keep Your Customers Coming Back For More](#)
-  [The Definitive Guide to Lead Nurturing](#)

Additionally, you can visit [Marketo University](#) for courses covering everything from marketing best practices to how-to instruction and tailored Learning Paths. And then you can review our [Product Docs](#), which include easy-to-follow documentation with step-by-step instructions and screenshots about Marketo's product features.

Retain and Grow Your Customer Base

- Establish goals for customer base marketing: adoption, retention, cross-sell, upsell, growth, lifetime value, etc.
- Segment and prioritize customers by interest and behavior to identify those who are close to churning as well as to identify cross-sell and upsell opportunities.
- Map products and services to relevant customer segments.
- Prioritize and segment your best customers by automatically qualifying them and measuring the level of interest in products and services.
- Listen to customer behaviors to determine their interest in specific products or services to predict customer needs so sales can easily prioritize conversations and focus on closing business.



Reporting: Measure and Prove ROI

There's a lot that goes on behind the scenes to generate sales pipeline and ultimately revenue. And with Marketo's robust reporting capabilities, you can demonstrate your impact on both.

Track your campaign progress to course-correct in real-time, prove results, optimize your campaigns, and report on your results. Start measuring at the beginning of your campaigns for a baseline to benchmark and optimize your future campaigns against. It may take some time to see immediate results depending on your business model and average sales cycle, so you'll need to continue to measure your campaigns long after they first launch.



CHECK OUT THESE HELPFUL RESOURCES FOR MORE INFORMATION ON HOW TO MEASURE AND PROVE YOUR RESULTS

Downloadable resources:



[The B2B Marketer's Guide to Decoding Metrics](#)



[The Definitive Guide to Marketing Metrics](#)

Additionally, you can visit [Marketo University](#) for courses covering everything from marketing best practices to how-to instruction and tailored Learning Paths. And then you can review our [Product Docs](#), which include easy-to-follow documentation with step-by-step instructions and screenshots about Marketo's product features.

ROI Analysis

It's critical for you to track the appropriate metrics for each stage of your buyer's journey.

Early-stage: Early-stage analysis is a great place to start when you're launching a new campaign. Opportunities take a while to develop, but there are other important metrics you can track during this stage.

- Investment:** budget dollars invested
- Investment per new name:** measures how much you're spending to acquire each new name, which indicates buyers who have entered your database but have not engaged yet (e.g. name acquired through a business card at a tradeshow)
- % new name:** indicates how many names are new to your database out of all the leads your campaign is generating
- Investment per lead:** measures how much you're spending to acquire each new lead, which indicates a potentially qualified buyer who is opted-in to your marketing communications
- Investment per success:** measures how much you're spending to acquire each new success, which indicates people who take the desired action of your campaign (e.g. registering for and attending an event vs. just registering for it)

Mid- to late-stage: Once the leads in your campaigns start to convert, you can start measuring ROI and determine whether your campaigns are worth the continued investment by analyzing later-stage metrics.

- First-touch (FT) opportunities:** indicates the number of opportunities created by the sales team (interested, have budget, have authority, have the need, have the time, etc.) calculated using first-touch (FT) attribution, which means that the original acquisition campaign gets 100% of the revenue credit
- Multi-touch (MT) opportunities:** indicates the number of opportunities created by the sales team (interested, have budget, have authority, have the need, have the time, etc.) calculated using multi-touch (MT) attribution, which credits the revenue to every successful marketing interaction with a lead
- First-touch (FT) pipeline:** measures which campaigns are the most efficient at acquiring new leads
- Multi-touch (MT) pipeline:** measures which campaigns are the most efficient at pushing leads through the funnel
- First-touch (FT) ratio:** indicates your investment vs. FT pipeline generated
- Multi-touch (MT) ratio:** indicates your investment vs. MT pipeline generated
- Revenue won:** amount of money generated from a closed deal

Marketo Reports

Here's a list of reports that you can set up in Marketo to measure and optimize your ROI. While many of these come with standard licenses, some are available with our Advanced Report Builder application.

Prospects

Leads by Revenue Stage →

Reports on which stage of your revenue model your leads are in, which map directly to your organization's marketing and sales funnel.

| Lead Revenue Stage ▲ | Total Leads |
|----------------------|-------------|
| Won | 1 |
| Sales Lead | 6 |
| Opportunity | 3 |
| Lead | 30 |
| Known | 20 |
| Total | 60 |

Leads by Status →

Automatically reports based on the Lead Status field, which indicates a lead's value specific to your marketing and sales process. This may include the lifecycle stage, but also allows you to be more specific (e.g. in progress, recycled, unqualified, etc.).

| Lead Status | Leads Cre... |
|----------------------|--------------|
| 2010-01 | |
| Ex-Pending | 2320 |
| Prospect | 759 |
| Recycled | 677 |
| Inquiry | 550 |
| Customer | 267 |
| Pending | 192 |
| Disqualified (Mktg) | 121 |
| Ex-Customer | 35 |
| Disqualified (Sales) | 29 |
| Marketing Contacts | 27 |
| Lead | 4 |
| Partner | 4 |

Lead Performance →

Groups leads by any attribute (e.g. demographics, behaviors, date created, etc.) and whether there are any opportunities associated with the lead.

Lead Performance 2 Report Smart List Setup Subscriptions

New Report Actions Drill-Down

Lead Created At: Jan 1, 2010 - May 1, 2010 PDT

| Created At | Total Leads |
|------------------------------|---------------|
| Leads by Created At / Months | |
| May 2010 | 21 |
| Apr 2010 | 5,706 |
| Mar 2010 | 7,614 |
| Feb 2010 | 15,297 |
| Jan 2010 | 4,991 |
| Total: | 33,629 |

Campaigns and Channels

Program Performance →

Includes new names brought in by your programs and the cost-effectiveness of each one.

Program Performance Report Setup Subscriptions

New Report Actions

All Time

| Program | Channel | Cost per New Na... | New N... | New N... |
|---------------------------------|--------------------|--------------------|----------|----------|
| Webinar Example | Webinar | | 0 | 0 |
| User Group San Francisco Ev... | Roadshow | | 0 | 0 |
| User Group Landing Page | User Group Meeting | | 0 | 0 |
| San Francisco User Group Mt... | User Group Meeting | | 0 | 0 |
| San Francisco User Group - S... | User Group Meeting | | 1 | 0.2 |
| San Diego User Group Events | Roadshow | | 1 | 7.69 |
| San Diego Group Events | Roadshow | | 0 | 0 |
| Phoenix User Group - Septe... | Roadshow | | 0 | 0 |

Engagement Stream Performance Report →

Reveals how well nurture programs are working in terms of email KPIs such as opens, clicks, and sends.

Engagement Stream Performance Report Smart List Setup Subscriptions

Report Actions

Date of Activity: Last 30 Days (May 25, 2014 - Jun 23, 2014 PDT)

| Email Name | Enga... | Sent | Delivered | % Deliv... | Hard B... | Soft Bo... | Pen... |
|--------------------------------|---------|-------------|-------------|--------------|-----------|------------|----------|
| My Nurture Program.Early Stage | | | | | | | |
| My Nurture Program.My Em... | -- | 2565 | 2533 | 98.7 | 15 | 0 | 0 |
| Total: | | 2565 | 2533 | 98.8% | 15 | 0 | 0 |

Email Link Performance →

Reveals how often individual links in your emails are clicked on.

| Link | Clicks | % Clicks | Leads | % Leads |
|--|-----------|----------|----------|---------|
| Ran's Bday Brunch Invite Invitation http://go.commadot.com/Rans-Bday-BrunchInvite_rsvp.html | 14 | 100.0% | 9 | 100.0% |
| Total | 14 | | 9 | |

Email Performance →

Reports on interactions with your emails, whether it was delivered or bounced, opened and clicked on by your subscribers, and if anyone unsubscribed.

| Email Name | Sent | Delivered | % Deliv... | Hard B... | Soft Bo... | Pen... | Open... | % Op... |
|------------------------------|----------|-----------|---------------|-----------|------------|----------|----------|--------------|
| Champion Challenger.My Ch... | 4 | 4 | 100.0% | 0 | 0 | 0 | 1 | 25.0% |
| Total: | 4 | 4 | 100.0% | 0 | 0 | 0 | 1 | 25.0% |

Landing Page Performance →

Reveals how many people filled out the forms in your landing pages, and how many of them were new leads.

| T... | Name | Total Views | Conversio... | Conversio... | New Names |
|------|----------------------------------|-------------|--------------|--------------|-----------|
| | Revenue Rockstar Fall 2011 - ... | 1391 | 256 | 18.4 | 51 |
| | Revenue Customer Fall 2011 ... | 325 | 56 | 17.23 | 1 |
| | Revenue Rockstar Fall 2011 - ... | 108 | 24 | 22.22 | 1 |
| | Chicago Cloudforce Dinner Ja... | 16 | 9 | 56.25 | 0 |
| | Chicago Cloudforce Dinner In... | 11 | 0 | 0 | 0 |
| | Revenue Rockstar Fall 2011 - ... | 150 | 0 | 0 | 0 |
| | Revenue Rockstar Fall 2011 - ... | 53 | 0 | 0 | 0 |

Web Page Activity →

Reports on web activity to your landing pages and public website, such as specific pages viewed, where they were referred from, and who they were viewed by (if a Munchkin code is associated with the lead).

| Lead | First Visit (PDT) | Page Views | HTTP Referrer | Entry |
|--|----------------------|------------|-------------------------|--------|
| James Meyer Marketing Manager | Sep 26, 2008 10:... | 138 | Google: lead nurturi... | /blog, |
| Jeff Hughes Director of Sales | Apr 9, 2009 10:5... | 17 | | /real- |
| Dominick Doyle Website and eMarketing Admin | Feb 8, 2010 2:45 ... | 1 | http://www.marketo... | /you- |

Company Web Activity →

Reports on web activity to your landing pages and public website, grouped by specific companies.

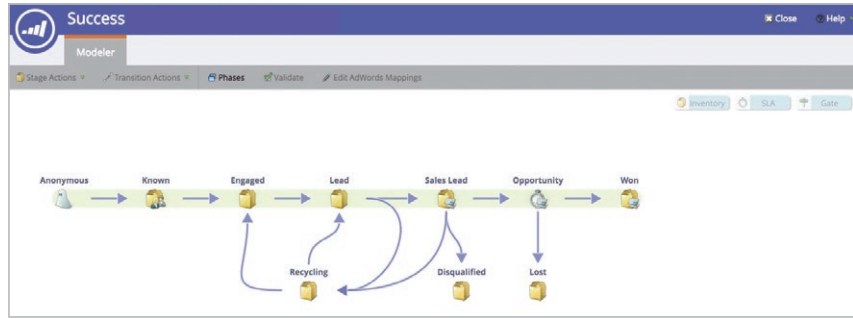
| Company | Inferred Company ... | Pag... | Leads | Country | State/Region |
|---------|----------------------|--------|-------|----------------|-----------------|
| | | 471 | 1 | Sweden | Skane |
| | | 116 | 1 | Mexico | Distrito Fed... |
| | | 65 | 1 | United King... | |
| | | 51 | 1 | United King... | |

Revenue Model

While these aren't reports, they are important applications to be aware of:

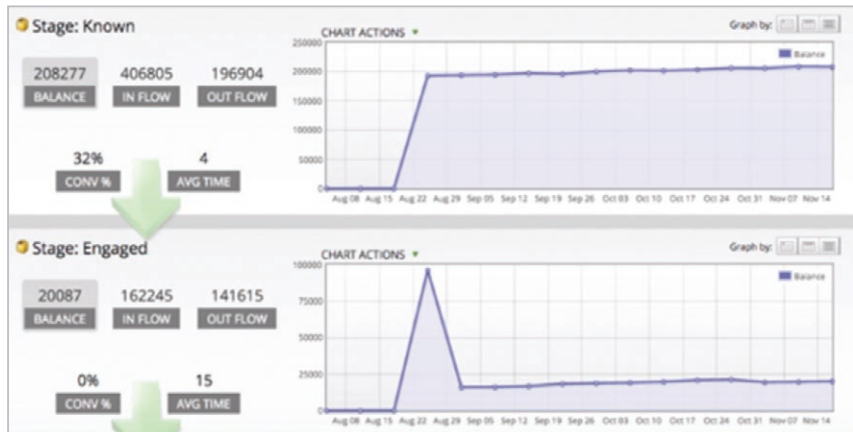
Lifecycle Modeler

Models your revenue model to direct the rules in Marketo for how each lead will be passed from one revenue stage to the next.



Success Path Analyzer

Visualizes how your leads are moving through your *Lifecycle Modeler*. It includes specific details that reflect both flow (amount) and velocity (speed, in terms of days) of people through the stages of your Revenue Cycle Model.



Sales and Marketing Alignment

Sales Insight Email Performance

Reveals interactions with emails sent to prospects and customers through Marketo Sales Insight in Salesforce, Microsoft Dynamics, and the Outlook and Gmail plug-in.

The screenshot shows the 'Sales Insight Email Performance' report. It includes a 'Report' button and tabs for 'Smart List', 'Setup', and 'Subscriptions'. The main table displays email activity data for the period 'Last 30 Days (Nov 10, 2014 - Dec 9, 2014 PST)'.


| Email Name | Sent | Opened | % Opened | Clicked Email | % Clicked Email |
|---|--------|--------|----------|---------------|-----------------|
| Sales Email Activity | | | | | |
| No Template | 25,794 | 16,473 | 63.9% | 1,093 | 4.2% |
| GLOBAL LOCAL ASSETS.EMEA - F/U Interest in M.A - AE Email Te... | 86 | 36 | 41.9% | 0 | |
| SI - RPM Benchmark | 1 | 0 | | 0 | |
| SI - Weekly Demo Accelerator Invite | 0 | 2 | | 0 | |
| Trial | 9 | 4 | 44.4% | 0 | |
| No Phone Number | 5 | 5 | 100.0% | 0 | |
| Intro Email - Target Accounts | 201 | 76 | 37.8% | 3 | 1.5% |
| Intro Email - Target Accounts - Past Interest | 1 | 0 | | 0 | |
| Generic/No Answer | 76 | 37 | 48.7% | 0 | |
| Free Trial Request | 4 | 3 | 75.0% | 0 | |
| Phone Call | 161 | 67 | 41.6% | 4 | 2.5% |
| Your Recent Interest | 2,553 | 1,110 | 43.5% | 24 | 0.9% |

Marketo Resources


With Marketo, you never have to go it alone. There are a variety of resources available to you to help you achieve your marketing and business goals.

Marketo University

Whether you're looking to learn and apply industry best practices, gain hands-on skills, or develop a global Marketo training program, the Marketo University team is available to help you every step of the way.

 **Marketo Training:** Marketo University offers a broad range of training courses covering everything from marketing best practices to how-to instructions and tailored Learning Tracks, all aimed at helping you focus your marketing efforts to achieve maximum business impact. Access on-demand courses in our University, where you'll find a library of learning content on a variety of topics.

Be sure to visit the Marketo University at www.learn.marketo.com and register for the Getting Started learning path. This hand-picked set of on-demand courses is the ideal way to begin learning the basics.


 **Learning Passport:** With a Learning Passport subscription, you'll have the freedom to choose any of our classroom or public instructor-led virtual training courses, and you'll also get on-demand access to our growing library of premium learning content. Contact us at services@marketo.com for more information or to purchase a Marketo Learning Passport.


The resources in Marketo University will prepare you for the Marketo Certification Program, which provides a highly respected technical marketing credential that demonstrate your knowledge, ability, and experience. Visit the Marketo Certification Page to learn more about the Marketo Certification program and how to prepare for the certification exams.





Services

Marketo's professional services and enablement teams have helped thousands of marketers accelerate time to value, and get the most from their Marketo investment. Services available for purchase are listed below. Refer to your contract or reach out to your Customer Account Manager to see what's included on your order:

 **Launch Pack:** Unless you're already familiar with the Marketo platform or are working with a partner or external consultant, we recommend getting started with a Marketo Launch Pack implementation service which include setup and configuration assistance, hands-on training, initial templates, best practice coaching, and one-on-one consulting—all in one convenient package. Your assigned Enablement Consultant will guide you through setup steps, tailor a success plan focused on your goals, and help you build your initial campaigns.

 **Office Hours:** Over the duration of your Launch Pack, you can participate in Marketo Office Hours, our daily group GoToTraining sessions where you can ask questions, get how-to advice, and discuss best practices with a Marketo expert. For more information, please contact us at services@marketo.com.


 **Creative Services:** Need more templates than those provided with your Launch Pack? Marketo's Creative Services team can develop visually attractive emails, landing pages, and mobile templates to help you elevate your brand and drive improved engagement and conversion.


 **Expert Consulting:** After launch, you can engage our Professional Services team for strategic and hands-on consulting to help you transform your marketing practice. Our team of digital marketing experts can help you turn your marketing vision into real-world results.





Support


Marketo's industry-recognized Customer Support organization is committed to your success and satisfaction. All Marketo subscriptions include a level of support that provides easy access to our highly skilled technical resources for fast answers and technical assistance. Here's how you can reach us:

 **Support Portal:** Visit our **Support Portal** by logging into your Marketo account and selecting Customer Support from the Help menu. In the portal, you can search our growing Marketo Support Knowledgebase or submit a case to our Support team. Please note that the number of users who can open support cases is limited by your subscription—and your Marketo Admin can add members of your team as authorized contacts.

 **Web Support:** Go to the My Cases section of the Support Portal to open a web case, and it will automatically be routed to our experts for resolution.

 **Live Chat:** Start a live chat session with Marketo experts and we'll answer your questions, point you to detailed support resources, or open a support case. To start a chat session, please visit the Marketo Support Portal and click on the Live Chat button.

 **Twitter:** We're always happy to respond to you via Twitter. Reach us at our handle, [@MarketoCares](https://twitter.com/MarketoCares).

 **Call:** If your subscription includes it, you can submit a phone case for your support request. Or, for any P1 (production down) issues, please call us. Visit the support portal to find contact information for your region.

For those with more extensive support requirements, we also offer premium support services that include access to named support professionals, unlimited telephone case submissions, accelerated service-level response, and sessions for proactive mentoring and business reviews. For more information on purchasing an upgraded support level, please contact your Customer Account Manager.

Customer Community

Engage with other members of the Marketing Nation® in our **Customer Community**. Get answers to your questions, share your best practices and lessons learned, and—together—help each other get the most out of the Marketo platform.

Product Docs

Access easy-to-follow documentation with step-by-step instructions and screenshots about Marketo's product features on our **Product Docs** site. Visit **Getting Started** for an overview of how to get started and score some quick wins with our core features.

Resources Center

Visit our **Resources Center** to access informative ebooks, Definitive Guides, webinars, cheat sheets, worksheets, and more on a diverse set of marketing topics including content marketing, digital marketing, email marketing, sales and marketing alignment, lead management, and more.

Marketo Blog

Check out the **Marketo Blog**, which features thought leadership pieces for b2b and consumer marketers that highlight tips, tricks, best practices, emerging trends, and more. New blogs are posted every weekday, except for select holidays.

User Groups

Join a User Group in one of 50+ cities globally to hear from experts and peers. Or, find a virtual group in your language or one that shares your industry or topic interests.





Marketo provides the leading engagement marketing software and solutions designed to help marketers develop long-term relationships with their customers—from acquisition to advocacy. Marketo is built for marketers, by marketers, and is setting the innovation agenda for marketing technology. Marketo puts Marketing First. Headquartered in San Mateo, CA, with offices around the world, Marketo serves as a strategic partner to large enterprise and fast-growing small companies across a wide variety of industries.

To learn more about Marketo's Engagement Marketing Platform, LaunchPoint® partner ecosystem, and the vast community that is the Marketo Marketing Nation®, visit www.marketo.com.