**PFL**

# YOUR GUIDE TO INTEGRATING
# **TACTILE MARKETING AUTOMATION®**
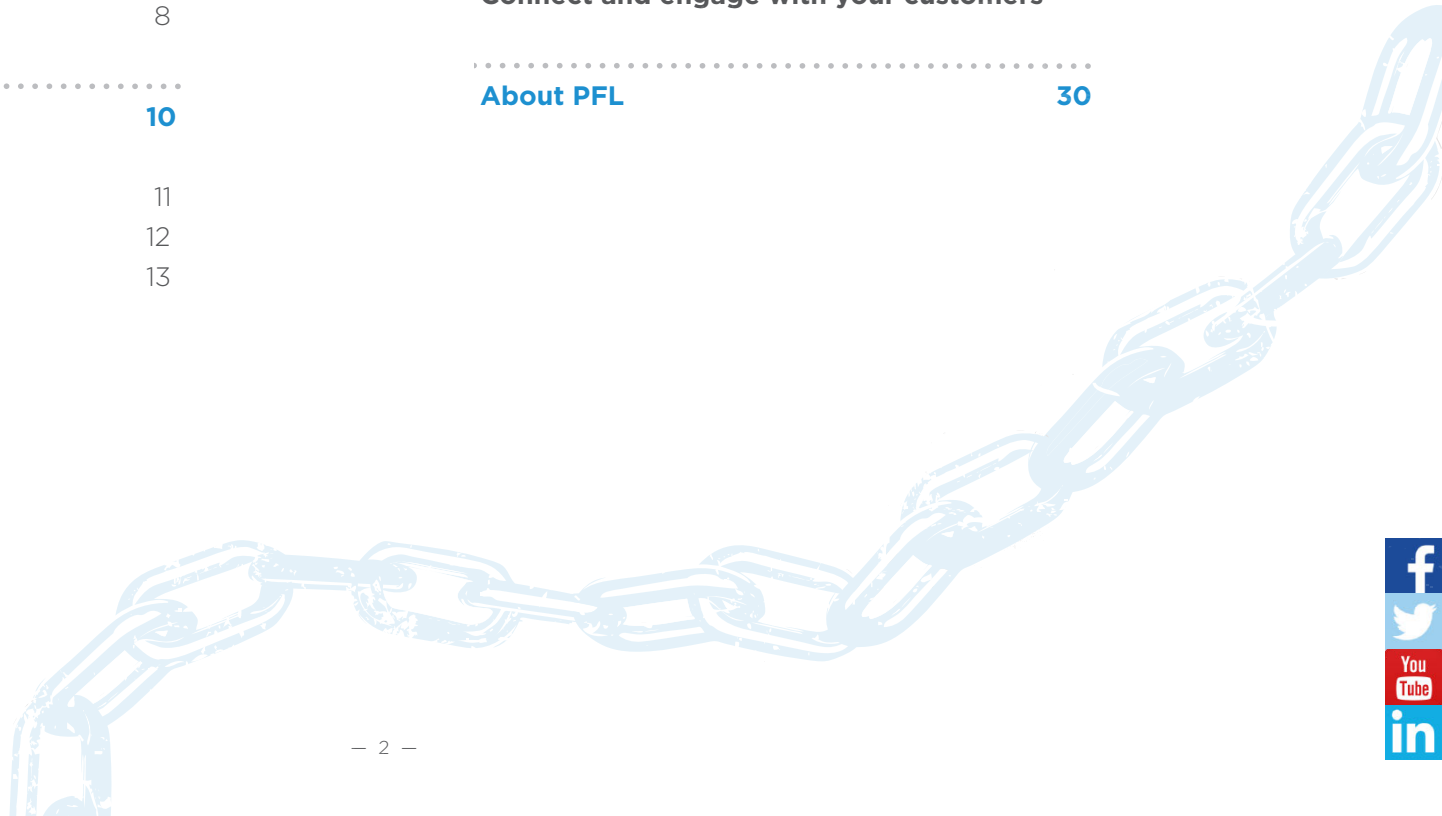# INTO MARKETO

**Create a successful Tactile Marketing Automation® campaign using Marketo**

# Contents

# Introduction

# Integrating Tactile Marketing Automation® into Marketo

**So you want to bring the power of direct and dimensional mail into your marketing mix. Good choice! This guide will walk you through the steps you need to set up a repeatable, successful campaign in Marketo.**

Before you start building those programs, though, you'll want to address a couple of things.

**1** **First, make sure you have your data as clean and prepared as possible.**

Check out our step-by-step guide on Data Planning for Direct Mail Success:

**2** **Second, be ready to measure your campaigns.**

Again, we have a complete guide for you here:

**TMA® defined**
The Tactile Marketing Automation (TMA) solution helps marketers drive results through the send of personalized, high-impact dimensional mail, directly from their marketing automation platform.

This guide focuses on the integration of TMA with Marketo.

# Introduction

Once you complete your data clean-up and management process, you'll have utter confidence in your lead database. You'll put the right metrics in place for measuring the success of your campaigns. You're ready to integrate Tactile Marketing Automation (TMA) into your marketing automation platform. You only need a map to execute your strategy.

**Look no further. We've taken the hard work of transferring that strategy right into Marketo and clearly explained it below. This step-by-step, straightforward guide will have you up and running quickly and easily.**

**Let's get started!**

Part I

# Set up a channel

PFL

# Part I

## Set up a channel

**In order to properly track success to your TMA investment, we recommend setting up a channel to keep track of assets and measure success.**

As with all programs in Marketo, progressions are set at a global setting. Because of this, we do not recommend varying the progressions on an individual program-by-program basis. This will allow you to maintain consistency from program to program and be able to compare results across the board.

Go to Marketo Admin section and add the progressions that make the most sense for your organization.

**New channel**

**General and direct response progressions**

**Three lifecycle progressions (optional)**

### Edit Channel

| | |
|---|---|
| Channel: | * Direct Mail |
| Applies to: | Default |
| Analytics Behavior: | Normal (requires period cost) ▼ |

Program

To reorder, change the step number

| Status | Step | Success | Hide | Delete |
|---|---|---|---|---|
| Registered | 5 | ☐ | ⊖ | |
| Direct Mail Queue | 10 | ☐ | ⊖ | ✕ |
| Sent Direct Mail | 15 | ☐ | ⊖ | ✕ |
| Received Direct M | 20 | ☐ | ⊖ | |
| Responded | 30 | ☑ | ⊖ | ✕ |
| MQL | 40 | ☑ | ⊖ | ✕ |
| SQL | 50 | ☑ | ⊖ | ✕ |
| Won | 60 | ☑ | ⊖ | ✕ |

# The TMA progression overview

PFL

## Part II

# The TMA progression overview

### The progression key

Feel free to adjust the terminology to meet your own preferences. You must set up trigger campaigns for each progression step to track individual progression values.

### Required progression steps:

- **Registered** – Set this step for anyone who fills out a form requesting the direct mail piece.

- **Direct mail queued** – Set this step to indicate when the order is sent to PFL. This will show that the mail is queued at our facility.

- **Sent direct mail** – Set this step to indicate when we ship your direct mail.

- **Received direct mail** – Set this step to indicate that the direct mail piece was received by the prospect/customer, based on tracking information.

- **Responded** – Set this step for anyone who responds to the direct mail call-to-action (i.e. filling out the appropriate form).

- **Called** – Set this step to indicate anyone who calls into the system. Note: only necessary if your company leverages a calling platform.

### Optional progression steps:

**Simple lifecycle measurements**
- **Lifecycle influence** – Set this step to indicate anyone who has lifecycle success after the direct mail piece is sent.

**Advanced lifecycle measurements**
- **MQL** – Set this step to indicate anyone who converts to an MQL after the direct mail piece is sent.

- **SQL** – Set this step to indicate anyone who was added to an opportunity after the direct mail piece is sent.

- **Won** – Set this step to indicate anyone who becomes a customer after the direct mail piece is sent.

# Part II: The TMA progression overview

As a general rule, you should only use program statuses that make sense to you. Feel free to mix and match statuses based on your success goals.

| Success type | Program statuses |
|---|---|
| **Direct action** | • Registered<br>• Direct mail queued<br>• Sent direct mail<br>• Received direct mail<br>• Responded<br>• Called (use if your instance is integrated with a third party telephony solution as described in Measuring the Success of Direct Mail) |
| **Funnel influence**<br>Add lifecycle listening campaigns to your TMA programs just like you would normal program progressions. If someone else hits one of those stages and the person has received the automated direct mail, the campaign will adjust the progression to show the funnel success. | **Simple lifecycle measurement**<br>• Lifecycle influence<br><br>**Advanced lifecycle measurement**<br>• Marketing qualified lead (MQL)<br>• Sales qualified lead (SQL)<br>• Won (new customer) |
| **Custom successes** | N/A. We recommend measuring this success via a CRM campaign or a Marketo list. |
| **Advanced successes** | N/A. Custom reporting can help provide insight into any custom progressions. |

Part III

# Your program model
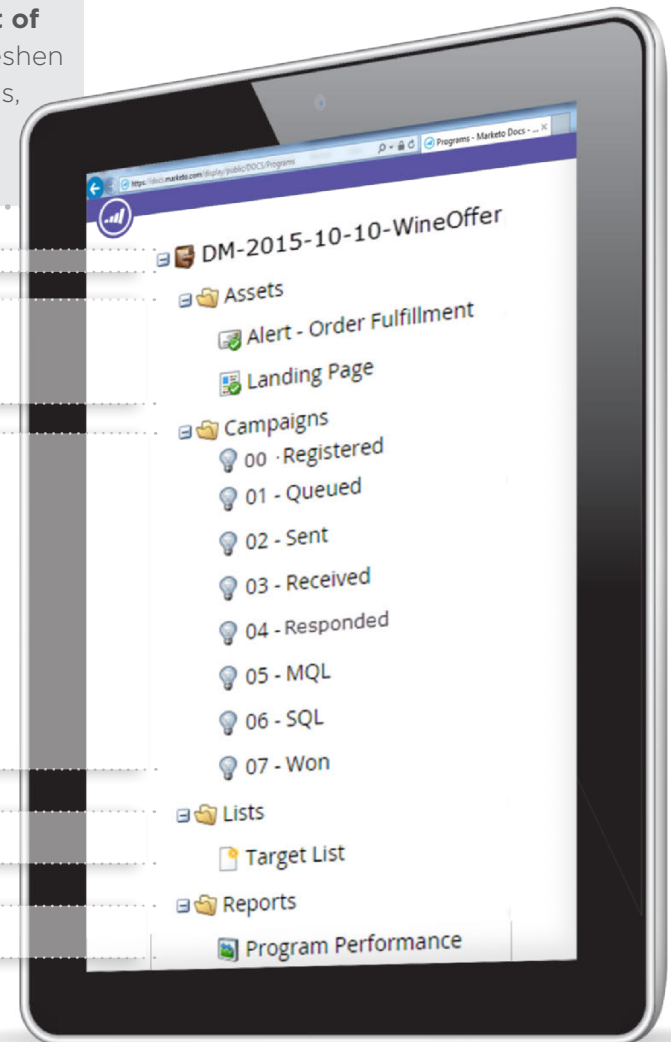
PFL

# Part III

## Your program model

**Once you have developed the foundation, you need to create a model program that you can refer to when creating new or cloned programs. Take the time to set up this initial program for long term success, and use this program as your template for future automated direct mail campaigns.**

We recommend that you create a program for each initiative so you can track them separately. Cloning your model program will keep each initiative consistent.

**This section assumes you are familiar with the concept of Marketo programs.** To freshen up on some key program concepts, visit the Marketo Community. https://docs.marketo.com

- **Program** – Where all of your direct mail assets are managed and tracked.

- **Assets** – Manage alerts and landing pages in the Assets folder.

- **Campaigns** – Set trigger campaigns to manage the progressions of your direct mail initiatives.

- **Lists** – Determine who should receive (and not receive) your direct mail.

- **Reports** – Gain insights into direct mail with various reports.



DM-2015-10-10-WineOffer
Assets
  Alert - Order Fulfillment
  Landing Page
Campaigns
  00 · Registered
  01 - Queued
  02 - Sent
  03 - Received
  04 - Responded
  05 - MQL
  06 - SQL
  07 - Won
Lists
  Target List
Reports
  Program Performance

# Part III: Your program model

## Types of campaigns

**Throughout the rest of this guide, we will discuss trigger campaigns. TMA supports trigger campaigns, although you can use Batch Target Lists as well. See page 18 for additional details.**

### Trigger programs
These campaigns provide a more relevant and engaging customer experience by delivering the right content to the right person at the right time.

# Part III: Your program model

## Evergreen Systematic Programs

An Evergreen Systematic Program (or triggered program) is based on triggered contact actions or events, and will allow you to get the most life from your TMA process. Setting up these campaigns is more initial work, but this program structure significantly reduces ongoing maintenance for your marketing team. A couple of examples:

**Trigger**
Engage one lead at a time, based on a triggered event.

- When a C-level lead's score rises to 50, automatically send the C-level lead a premium gift.

- When a new target account lead enters the system, send a postcard.

**Nurturing/Engagement**
The gift is scheduled automatically according to the nurture/engagement stream cadence.

- Deliver a gift as the fourth item in an engagement stream.

- Send a gift after three nurture emails go unclicked.

**For more information on Marketo batch and trigger campaigns,** please refer to this article in the Marketo Community:

https://docs.marketo.com

# Components of the program

PFL

# Part IV
# Components of the program

🔗 ..........................................................................................................

## Assets

The Assets folder is where you will manage all of your TMA program assets. A few examples:

- **Landing page** – This is the page where your visitors arrive when they perform your call-to-action (assuming you are using Marketo-hosted pages).

- **Email confirmations** – You can use email confirmations to mark important milestones in your campaign (when the dimensional mail is shipped, when it is delivered, etc.). We recommend incorporating lead tokens within the email confirmation to provide information on shipping date, tracking information, delivery confirmation and more.

  This best practice is a great way to ensure you are engaging with your prospect or customer, and gives you another touchpoint in the prospect/customer journey.

- **Alerts** – Use alerts to notify Sales reps within your organization about actions like:
  - When your direct mail piece is shipped.
  - When the prospect/customer receives your direct mail.
  - When the rep should call the prospect/customer.

# Part IV: Components of the program

## Lists

### Define the Target Smart List

The Target Smart List is where you build the audience that will receive your direct mail. Think of it like a traffic cop. In order to send automated direct mail, a recipient must pass certain criteria.

This list should include your target audience while excluding individuals you want to weed out. Each Target List is specific to the individual automated direct mail program. You may use this list as part of a batch campaign or as part of a trigger campaign that auto-adds members to the mail program.

In this example, our list includes C-Level executives in manufacturing who are not on any of the exclusion lists.

**The Direct Mail Exclusion Smart List**
This Smart List is essential to every automated direct mail campaign because it eliminates potential bad data.



We recommend setting this up as a global list in the Lead Database so you can reference it across all your TMA programs. This global approach allows you to set up a single list that you can reference in all your programs, rather than having to add all the general mailing suppression criteria for every direct mail program you develop. Set this list up with the same naming conventions as your other exclusion lists.

This simple example of an exclusion list identifies people that shouldn't be in this direct mail program because of bad address data.

**NOTE:** Set filters to ANY in order to remove contact records that have bad data in any of the fields that would make a direct mail piece undeliverable.
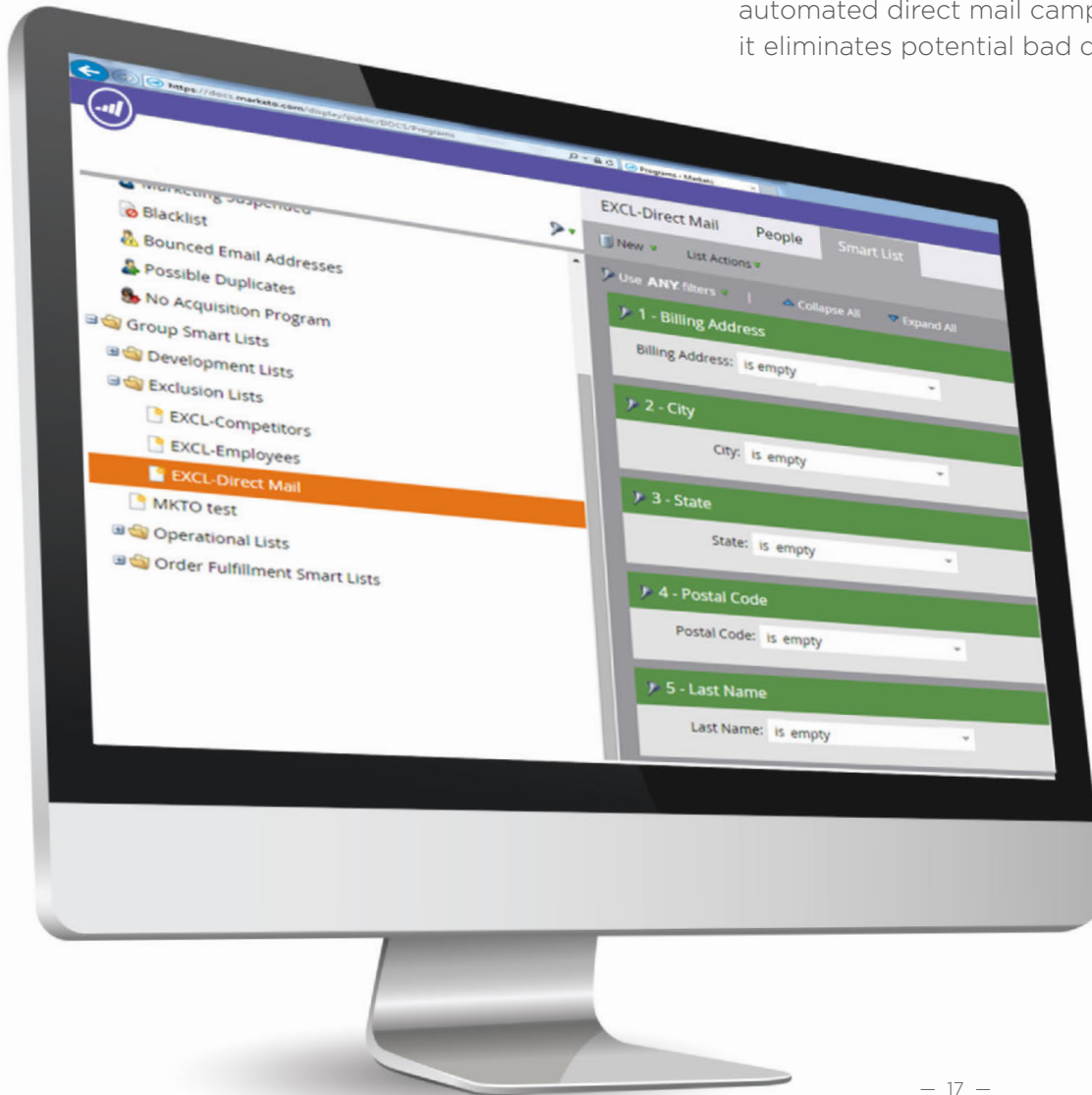
# Part IV: Components of the program

## Campaigns

The campaigns do the heavy lifting of moving leads through program progressions while performing other workflow activities. Let's look through the campaign steps of this program.

There are 3 options for campaigns that identify who should enter the direct mail program.

**Option 1: 00 – Registered**
This optional campaign listens for a potential recipient to fill out a form that requests the direct mail piece. This step is ideal if you want to use a form to trigger the direct mail.

**Option 2: 00 – Batch Target List**
For organizations that want to send direct mail to a group of people, create a batch campaign that defines who should get the direct mail. The purpose of this campaign is to batch up the Target List you already created and request the Marketo campaign that contains the webhook capabilities.
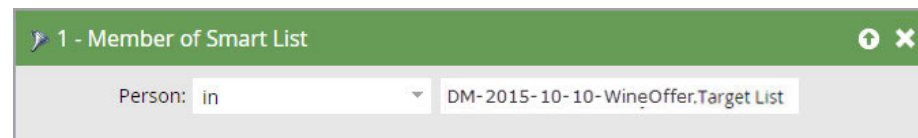


Example of the flow progression:



**Option 3: Engagement Programs for Systematic Marketing**
For advanced marketers who use Marketo Engagement programs, you can use a Request Campaign trigger directly from the nurture engagement program. This seamlessly sends direct mail as easily as sending an email as part of an overall nurture strategy.

Consult your PFL success manager for more information on engagement programs for systematic marketing.

# Part IV: Components of the program

**01 – Queued**

This is the key campaign that tells our fulfillment team to send the direct mail.

**Smart List**

Remember that you have to trigger the Direct Mail using a Marketo trigger (Batch Campaigns are not supported). In order to do this, add a Campaign is Requested trigger to this Smart List. You would request this campaign in the previous step.

**Flow**

You have several options to include within the flow.

1. Call the webhook offer to send the order to our teams. You will have set this up previously with your PFL Success Manager.

2. Change the program status to reflect that the order is in process and queued.

3. Wait 5 minutes.
   *Why? You want to give Marketo enough time to sync with our fulfillment system and pull in order information for the confirmation email.*

4. Send the email confirmation to the recipient.

5. Optional
   a. Send a "Thank You" email to complement the direct mail piece.

Example of the flow progression:

# Part IV: Components of the program

## 02 – Sent
Once we ship the item, we will automatically send the shipping date information to Marketo.

### Smart List
When the item's ship date populates with a date, use that process as the trigger.

**Data Value Changes**

Add Constraint ▾

Attribute: pfl Delivered Date

New Value: is not empty

### Flow
1. Change the program status to reflect that the order has shipped.

2. Send the email confirmation to the recipient.

3. Optional
   a. Send an alert to the Sales team.
   b. Log an interesting moment.

Example of the flow progression:

**1 - Change Program Status**

Add Choice

Program: DM-2015-10-10-WineOffer     New Status: Direct Mail > Sent Direct Mail

**2 - Send Email**

Add Choice

Email: Your Gift has Shipped

**3 - Send Alert**

Add Choice

Email: Alert     Send To: Account Owner
      To Other Emails: Enter email...

# Part IV: Components of the program

## 03 – Received
This campaign is triggered when the item is marked as delivered by the shipping company. This process only applies if your organization is using a trackable service.

## Smart List
When the item's delivered date populates with a date, use that process as the trigger.

**Data Value Changes**

Add Constraint ▾

Attribute: pfl Delivered Date

New Value: is not empty

## Flow
1. Change the program status to reflect that the order has been received.

2. Optional
   a. Send an alert to the Sales team.
   b. Log an interesting moment.
   c. Send an email confirmation to the recipient

Example of the flow progression:

**1 - Change Program Status**

Add Choice

Program: DM-2015-10-10-WineOffer    New Status: Direct Mail > Received Direct M

**2 - Send Alert**

Add Choice

Email: Received    Send To: Sales Owner
To Other Emails: *Enter email...*

# Part IV: Components of the program

## 04 - Responded
This campaign provides vision into the first level of success.

### Smart List
When the prospect/customer fills out a form, it will trigger this campaign step. Fills Out Form is the trigger you want to use. Choose the web page within the program as the constraint.

**Fills Out Form**

Add Constraint

Form Name: is any
Web Page: is    DM-2015-10-10-WineOffer.Land

### Flow
1. Set the program status as Responded.
2. Optional
   a. Send an alert to the Sales team.
   b. Log an interesting moment.
   c. Set a task for Sales to follow up.

Example of the flow progression:

**1 - Change Program Status**

Add Choice

Program: DM-2015-10-10-WineOffer    New Status: Direct Mail > Responded

**2 - Send Alert**

Add Choice

Email: Received    Send To: Sales Owner
To Other Emails: Enter email...

# Part IV: Components of the program

**Lifecycle successes - MQL, SQL, Won**
For organizations with a mature lead lifecycle model, these campaigns provide insight into the TMA program's effect on your funnel.

For organizations with a less mature model, you can simply group together lifecycle measurements into a single benchmark called "Lifecycle Success."

**Smart List**
This Smart List listens for MQL behavior for existing campaign members. You can easily replicate this for SQL and Won campaign members.

If you want to focus on new successes, you can add in a time element. For example, if direct mail was sent a year ago and the lead turns into a success today, do you want to give the mail program credit for the new customer?

This success time period can vary from one organization to another. A good rule of thumb is 90 days.

| Data Value Changes | | |
| --- | --- | --- |
| | | Add Constraint ▾ |
| Attribute: | Status | |
| New Value: | is | MQL |

| 1 - Member of Program | | |
| --- | --- | --- |
| | | Add Constraint ▾ |
| Member of Program: | true | |
| Program: | is | DM-2015-10-10-WineOffer |

| 2 - pfl Shipped Date | | |
| --- | --- | --- |
| pfl Shipped Date | in past | 90 days |

Example of the flow progression:

**Flow**
Change program status to the appropriate lifecycle status.

| 1 - Change Program Status | | |
| --- | --- | --- |
| | | Add Choice |
| Program: | DM-2015-10-10-WineOffer | New Status: Direct Mail > MQL |

# Part IV: Components of the program

## Campaign cheat sheet

| Campaign | Smart List | Flow |
|---|---|---|
| **00 - Registered**<br><br>-or-<br><br>**00 - Batch Target List** | Optional campaign to track direct mail requests if you want to review the requests before shipping the direct mail.<br><br>Optional campaign for organizations that want to batch send direct mail to a group. | • Change progression to *Registered*.<br>• Send an alert to the sales rep for approval. |
| **01 - Queued** | This is the key campaign that tells the system to send the direct mail. Make sure to include the Target List within this Smart List.<br><br>**Trigger Example:** *Data Value Changes* – when lead score hits 100.<br>• Title = CEO<br>• NOT a member of any exclusion Smart Lists. | • Call webhook and choose the direct mail campaign.<br>• Change program status to *Direct Mail Queued*.<br>• Optional: Send an email to complement the direct mail piece. |
| **02 - Sent** | This campaign is triggered when PFL ships the item.<br>**Trigger:** *Data Value Changes* - when the campaign's Ship Date changes to Not Empty. | • Change program status to *Sent Direct Mail*.<br>• Optional: Log an interesting moment and/or send alert to Sales with tracking information. |
| **03 - Received** | This campaign is triggered when the items are marked as delivered.<br>**Trigger:** *Data Value Changes* - when the campaign's *Deliver Date* changes to *Not Empty*. | • Change program status to *Received Direct Mail*.<br>• Optional: Log an interesting moment and/or send alert to Sales. |
| **04 - Responded** | This campaign provides vision into the first level of success.<br>**Trigger:** Fills Out Form on the page within the program. | • Change program status to *Responded*.<br>• Optional: Log an interesting moment and/or send alert to Sales. |
| **05 - MQL**<br>**06 - SQL**<br>**07 - Won** | For organizations with a mature lead lifecycle model, these campaigns provide some insight into the direct mail's effect on the funnel.<br>**Trigger:** *Data Value Changes* for lead status to MQL/SQL/Won.<br>**Filters:**<br>• Member of existing Direct Mail program.<br>• Deliver Date within past 90 days. | • Change program status to the appropriate lifecycle status. |

# Part IV: Components of the program

## Reports

This optional folder is designed to house any reports specific to the TMA program. We recommend including a program level report that provides a quick snapshot into the program's success.

You can also create specific reports that address delivery rates, delivery times, campaign step success, and other metrics that you want to track on a regular basis.
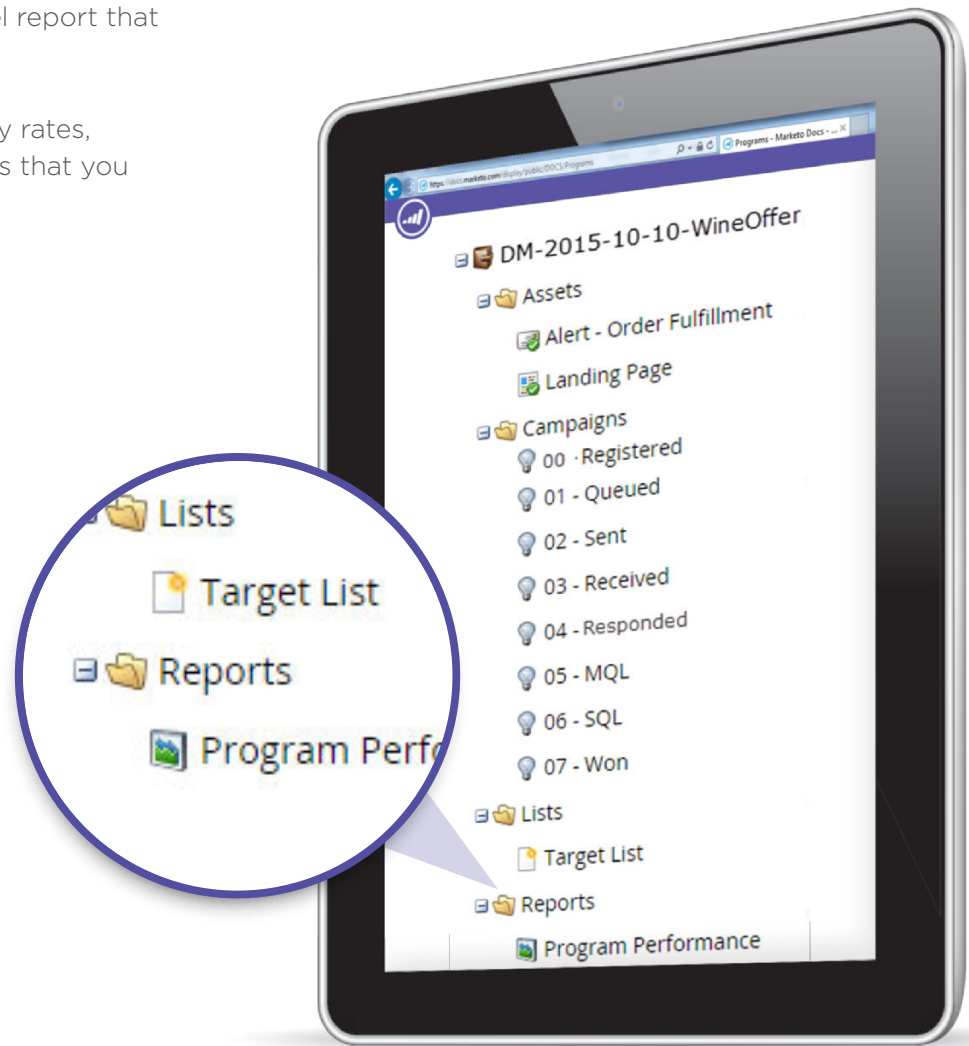
# Connect and engage with your customers

PFL

# Conclusion

## Connect and engage with your customers

**Developing a TMA campaign will have a significant impact on your ability to connect with and engage your customers. It drives "stickiness" in the customer journey and helps you stand out with tangible marketing that gets past spam filters and into prospect and customer hands.**

Taking a careful and measured approach to your initial program creation is the key to long term success. Think about the individual steps you want to track, and build your program accordingly. Investing the time in the initial program set-up will pay huge dividends down the road, when you're able to clone and execute programs with ease and efficiency.

Plan and build a model program in Marketo. Make sure you use global exclusion lists and targeted contact lists as a part of the model to streamline program development. This will serve as the foundation for all your future plans.

PFL

# Conclusion: Connect and engage

In the model, make sure you are driving contacts through the lead lifecycle that your company is using. Be consistent with your campaign steps, your taxonomy, and your flow. Incorporate alerts to keep internal stakeholders aware of what's happening with any individual campaign.

Finally, you will want to develop reports that track the specific metrics and key performance indicators that you define at the outset. You'll be able to look back at all the results of your hard work and know that you're measuring the right things when you take your metrics to that next board meeting.

The checklist:

- **Develop a TMA campaign.**

- **Have a carefully measured approach.**

- **Plan and build a program in Marketo.**

- **Track specific metrics.**

- **Celebrate the results.**

PFL

## About PFL

PFL is a marketing technology company that provides sales enablement and marketing automation solutions, as well as printing, mailing, and fulfillment services. We directly connect B2B and B2C organizations to cutting-edge solutions that accelerate productivity and drive business forward.

**PFL**

We're excited to help you get your TMA initiatives up, running, and delivering value as quickly as possible. For more information, contact one of our experts at 866.930.5088 or send an email to inquire@pfl.com.

www.PFL.com