How to Migrate to Marketo from Existing Marketing Automation Platform

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Chapter 1: Why Migrate To Marketo?

Do you face limitations with your current marketing automation platform? Is your existing marketing automation platform lacking the functionality to allow cross-channel marketing, analytics or in-depth reporting features? If you need to replace the marketing automation platform which lacks the features you need to maximize marketing campaign results with a better software that equips you with support resources, a scalable platform, system reliability, and all the latest trends in digital marketing, then with Marketo your search ends.

Marketo is a leading B2B and B2C marketing automation platform with functionalities for drip marketing, engagement marketing, lead management, lead scoring, lead nurturing, revenue and growth generation and many other features.

In 2015, Marketo produced revenue of more than $200 million with more than 4,500 customers from diverse industries including business services, high-tech, retail industry, telecom industry, financial services and media.

Marketo offers more than 500 technology solutions with a network of LaunchPoint partners who provide additional functionalities including: analytics, content marketing, events, social media, advertising technology, email list, broadcast, CRM and many other marketing technologies.

Chapter 2: Latest Releases Of Marketo

In September 2016, Marketo unveiled a horde of long-awaited product improvements and updates with 'Summer 2016 Release Notes.' With this Summer 2016 product update, Marketo has expanded marketing automation functionalities with features like:

Account-based marketing – One of the biggest moves and inclusion of functionalities to its marketing automation platform, Marketo's account-based marketing has three major benefits that are:

- a set of targeting tools to identify ROI driven accounts which also utilizes its lead scoring functionalities
- an engagement tool called 'Audience Hub' that lets users listening and tracing tools track behaviors of key decision makers

- powerful analytics that enable users to monitor, measure and optimize campaigns based on insight on engagement, campaign performance, revenue and other metrics.

Marketo suggests using related solutions provided by its LaunchPoint partners to maximize the benefits of its ABM tools.

Audit Trail – Another major addition to Marketo's marketing automation platform was Audit Trail, which keeps track of all logs and changes made by users to the account in order to trace unexpected behavior of any user, restrict users rights, and tighten the security of subscriptions.

Marketo-Vibes SMS LaunchPoint Integration – This will enable Marketo users to integrate Vibes SMS feature to its marketing automation platform to achieve mobile marketing pursuits by sending personalized messages to the right contacts at the right time.

Email 2.0 Enhancements – This update adds four new tools to the marketing automation platform which now includes Token Support in Image Elements, Syntax Updates, Module-level Variables and Code Searching.

Multiple Branding Domains – Marketo now enables adding multiple branding domains to create a streamlined look of products, services and brand, while enhancing email deliver ability and the ability to select branding domains for email delivery.

Program Tokens – These Program Tokens enable Marketo users to assign a program name, program ID and program description.

Enterprise Key – Enables marketing automation users to leverage an enterprise key in adding plug-ins for Outlook clients remotely.

Web Personalization Campaigns – Help Marketo users set a prior time for web campaigns to check how campaigns will impact the reach, engagement or conversion on websites.

Content Analytics and Recommendations Export – This update will allow marketing automation users to access and use content analytics and offline data.

Two other updates include the API Support for Email Editor 2.0 and Marketo Developers Site which has been made more developer-friendly with added improved features and functionalities.

Chapter 3: Improved Performance and ROI after Migrating to Marketo
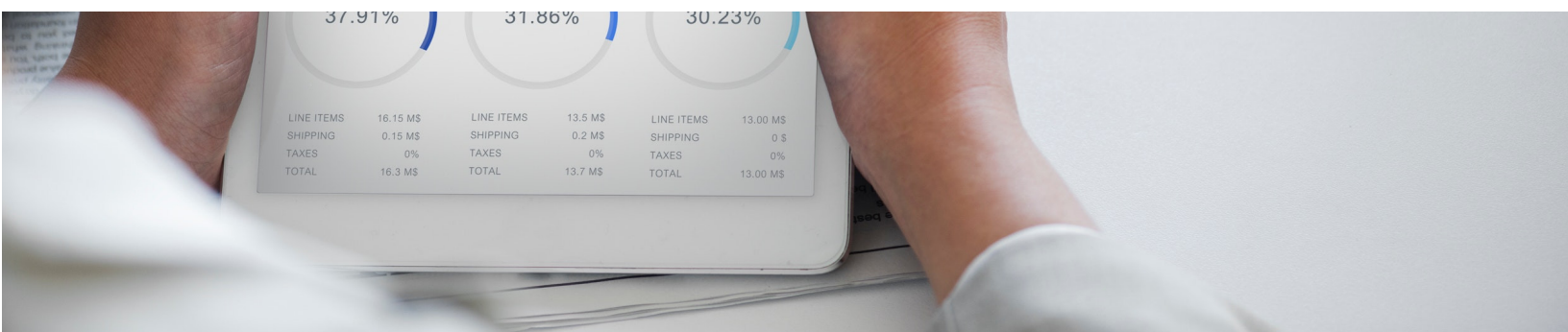
So, if you are planning to migrate to Marketo after discovering its latest features and its efficiency in pushing marketers to drive engagement and ROI, you might notice the following improvements in your business:

Boost business growth – Most companies are struggling to achieve scalable and ROI driven campaign results which lead to more customer acquisition. With Marketo's state-of-the-art marketing automation platform, companies and marketers can generate more leads, nurture them to fill the pipeline, track engagement and interactions, measure and optimize campaign results, define greater opportunities for upselling and cross-selling to augment revenue growth.

At that, Marketo's marketing automation platform doubles as improved engagement, performance, and a growth boosting platform. That's why around two-thirds of businesses that are listed under JMP Securities–100 Best Privately Held Software Companies list have migrated to Marketo's marketing automation for more customer acquisition, better engagement, higher conversion and improved customer relationships.

Become More Efficient – Marketo is designed to deliver modern functionalities and integrations with various related marketing technologies to enhance the productivity of campaigns. The system enables its users to create, tweak and clone campaigns to run across several channels. This marketing automation platform helps businesses and marketers save time and effort usually spent in such marketing activities. In addition to saving time, Marketo helps make marketing teams more efficient, closely align sales and marketing, supports integrating with all major CRM's marketing tools and platforms, offers advanced analytics to monitor, measure and optimize campaigns in order to increase campaign results significantly.

Advanced level of marketing automation –Another major advantage and edge you get over competitors who are not using Marketo's marketing automation, is the ability to perform advanced marketing campaigns. Companies using Marketo have reported superior marketing efficiency and techniques supported by a wide range of functionalities that are tied to the Marketo's marketing automation platform include email marketing, responsive email templates, mobile marketing, CRM integration, account-based marketing, marketing analytics and behavior tracking, event marketing, marketing programs, landing pages and forms, campaign management, lead generation, lead nurturing and management,

lead generation, lead nurturing and management, lead scoring, predictive content/scoring, social media marketing, consumer marketing, campaign and resource management, testing of campaigns and many other functionalities.

Amplify return on investment – Migrating to Marketo's marketing automation system from a less sophisticated platform will present huge opportunities for a greater degree of monitoring, measuring, testing and optimizing underperforming marketing campaigns. By optimizing campaigns based on insights on what factors are preventing campaigns to perform as planned, marketers can modify what works and what does not work and improve campaign results, revenue and ROI from the campaign.

Consistent progress and growth – By migrating to Marketo, you get access to a thriving community called The Marketing Nation which connects you to thousands of marketers, influencers, experts and thought leaders in the online marketing industry to interact and collect ideas and best practices in marketing campaigns. at the same time, you also get access to Marketo's LaunchPoint partners, which is an ecosystem of marketing applications that can augment the functionality of its marketing automation platform that includes social media, mobile marketing, analytics, CRM tools and many other tools that help maximize the use of the system.

Chapter 4: Best Practices To Maximize The Benefits Of Marketo

Now that you are all set to migrating to Marketo's marketing automation – below we have revealed the best practices we recommend to our ShowMeLeads clients to get the most out of the software. Take your marketing to a higher level using these tips.

Take advantage of Marketo implementation solutions: While you are implementing Marketo, do not miss those coaching sessions that help you onboard the new platform. Marketo and ShowMeLeads both create and broadcast training sessions which help a great deal in migrating, implementing and customizing the platform for your business.

All you need to do is to sign up and attend those events and you can also ask questions related to your marketing and business goals. This way you can get expert tips, ideas and suggestions on best practices and help on utilizing the features, functionalities and capabilities of the Marketo platform and how those will elevate the performance of your campaigns, customers' reach and acquisition, lead generation and conversion. We also provide hands-on guidance and assistance in implementing and migration of Marketo' marketing automation – contact us to learn more.

Get Trained on Marketo

You can ask for professional hands-on training from ShowMeLeads. We offer training to our clients on various aspects, features and functionalities of the platform and the migration and customization procedure. Our training sessions cover basic to advanced tools, terminologies of features, best practices and many other areas. You can also consider visiting Marketo University to check out more training sessions and courses. Additionally, you can check out our whitepapers, e-books, blogs and other resources to get in-depth ideas and become an expert in the platform before and after the migration process.

Start from the easiest – One caution here: after you migrated to the new marketing automation platform, do not consider beginning with those sophisticated, multi-channel campaigns.

Rather, start with the easier marketing campaigns to get the hang of the tools. You can pick those one-off email campaigns, monitor and measure the performance before you implement those complex marketing programs. Thus, you can learn to use the platform and its functionalities with multiple small programs well before you start with complex programs.

Get professional guidance for optimization –Seeking professional guidance or assistance for optimizing your programs on the Marketo platform will be a great way to ensure you are making the best use of its features and functionalities. Ask us for professional direction and expert recommendations on how to optimize your programs to maximize campaign results.

Chapter 5: How To Simplify The Process Of Migrating To Marketo

Sure your migration decision to move to a more robust and feature-rich platform will greatly benefit you in the future, but initial hiccups regarding moving all the emails, your CRM, assets and other complex aspects of your campaigns may give you sleepless nights – here are some last-minute recommendations and tips for a foolproof adoption of Marketo:

Keep track of everything –
Start recording and listing everything starting with your imagery assets, landing page templates, email templates, landing pages, contact lists, forms, all types of emails, and then move to the bigger, more complex parts, your programs.

Archive unnecessary assets –
You might not want to keep old email templates. If this is the case then it is time to archive those unnecessary assets before you begin migrating to a new marketing automation platform. Be sure to archive them and not to delete them.

Make a list of priorities –
It is important to prioritize every asset and campaign and list them in descending order, from top priority to the least important programs. For example, do you need to migrate last year's Halloween special promotional programs before your product demo? Make a list of priorities and move your programs to Marketo in that order.

Easily comprehensible names –
The naming convention is an essential practice while adopting or migrating to a new platform. Clear, comprehensive names make the job of migration a whole lot easier. Marketo recommends best practices in naming conventions which you and the whole crew need to follow so that not only your team, but the IT people who are taking care of the technical part of the migration can work more efficiently with less errors and issues popping up.

Test, test and more tests –
Test everything before you upload to the new platform. You need to test every subject line, every contact in the list for validity, every link, image and every other asset that are ties to your campaigns. Once you test all the assets and check if those are okay, then you can rest assured that they should work well after migration.This way it will be smooth sailing once your programs are up and running in the new instance. Now your entire team can run those more efficiently.

Define marketing goals beyond the Marketo migration –
Because you are planning for a better future for all your marketing goals and campaigns, it's imperative to set a goal that you are aiming to achieve by migrating to this new marketing automation platform. Call for a thorough team meeting with all the marketing and sales people involved in lead generation, boosting the pipeline, creating sales opportunities and closing deals. Especially if you are planning to adopt account-based marketing strategies, you need to align your marketing and sales teams to work more closely for exchanging insights and essential information on accounts including: the key decision makers of those accounts, the challenges and the business goals. Take every team player's perspectives on how you can evolve and improve your marketing efforts in growing revenue.

Consider the whole process as a project –
You should think of the migration process as a project. With that, you need to set a timeline with a start date and end date, assign a team member as a project manager who will monitor the project and coordinate across cross-functional teams and stakeholders to lead the migration process efficiently. The project manager will document every stage of the migration process according to the set deadline and optimize resources to be used to complete the process successfully and on time. Thus, your team can carry out their daily activities without interruption.

Scan through the CRM –
You need to scan through and audit the CRM system before you migrate to the new marketing automation platform. It is essential to audit fields and data in your CRM system for a fail-safe data migration of the CRM data to ensure seamless sync, data flow, no loss of data and call requirements.

Seek professional migration assistance whenever needed –
It is okay to ask for help, and we are happy to help you out. You might consider hiring and adding experts to your team to facilitate the migration and reduce the risk of errors. If you plan to save thousands of dollars from being spent on adding in house professionals to your team, you can reach out to a Marketo certified professional who will help in migration, optimization and ensure that you're running the programs in ways that drive revenue growth substantially. Not only that, but Marketo certified consultants can provide training for your team and conduct webinars and sessions that focus on specific functionalities and how they can create more scalable campaigns using Marketo's marketing automation platform.

Chapter 6: Setup A Checklist After Migrating To Marketo

After you have migrated to Marketo, be sure you do the following –

Login and assign users –
First of all, you need to sign in to Marketo and then create users and assign rights to all users as per their roles. Then, you need to configure the 'Authorized Support Contact'.

Landing pages –
Modify the subdomain URL of landing pages for campaigns to run on Marketo. You also need to choose a CNAME for the landing page. Next, you need to set up the 'DNS Record' for that CNAME of landing page – you may need professional assistance for this in case you do not have IT teams readily available in your company. When the DNS is done, you need to create a landing page domain for your Marketo campaign.

Emails –
For Email deliverability, you need to choose the email CNAME and get the DNS record set up for that email CNAME. Next, you need to make sure that Marketo is under the whitelist. Then, configure the 'SPF' and 'DKIM' from the Marketo admin section. After that, you need to configure the email CNAME with the marketing automation platform. Finally, you need to fill out the form to process submitting of the URL of email templates and landing pages. Then you can submit links of all new templates with the Marketo.

Syncing CRM platform –

In order to get the CRM platform syncing all valuable contacts to the Marketo platform, you have to embed the 'Tracking Code' to your company website. You can either get the site developers to add the code or seek professional assistance to get the CRM synced accurately to the platform during migration, without any loss of data. ShowMeLeads offers professional assistance in syncing the CRM platform with the Marketo as part of the migration process as well as a standalone CRM integration solution – tell us what you need. Syncing CRM platformIn order to get the CRM platform syncing all valuable contacts to the Marketo platform, you have to embed the 'Tracking Code' to your company website.

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Chapter 7: FAQ On Adopting Marketo

i. Which Marketo features are available for early adoption?

If you are wondering which features will be available for those who are adopting Marketo after its latest update release, then Marketo has good news for you. Every feature on the dashboard will be accessible to adopters right from day one, including the 'Account Score'. In the interim, users can set up accounts with the Marketo Lead Database, CRM system or do it manually in the previous version. While sales access to ABM insights outside of Marketo' is unavailable, you can bridge the gap with notifications and sales alerts.

ii. How to migrate to a new instance of Marketo?

Many users keep asking us if they can transition new instances of Marketo of different businesses including the history for lead score, web activity and emails. Unfortunately, maintaining your lead activities from an old to a new instance is not currently possible. Instead, users need to set up static lists while creating the new instance and then append all the leads to the new instance. If your Marketo platform is synced with Salesforce CRM, then you can save the data in Salesforce and extract from the new instance in Salesforce campaigns.

iii. What's the best way to move landing pages and forms?

Marketo adopters do not need to design new landing pages in Marketo to retain all the valuable monitoring functionalities. All they need to do is add adhering form tags and munchkin code to existing landing pages. Marketo saves a considerable amount of time to be spent in recreating all landing pages when you just need to retain tracking insights of existing pages. Later, you can continue creating new landing pages for your future marketing endeavors.

iv. How to migrate the campaign from sandbox to production?

The process of migrating campaigns from sandbox to production is fairly simple. First users need to locate the account string under 'Admin' > 'Landing Pages' option from the 'Production and Sandbox'. Next, raise a ticket with Support in order to get your accounts connected so that you will be able to use Import Programs. That's how you will access the account string and email addresses of users having Marketo admin rights in both campaign instances you want to migrate. Once you get Marketo admin access, you can select the instance from 'Import Program' option under 'Production'.

v. Do you need to delete data from Marketo during SFDC migration?

If you are working on migrating SFDC to Marketo, you may want to remove records that are hidden from Marketo before you begin syncing with the SFDC platform. Many users find deleting those records impossible since data to be hidden with the 'Hide from Marketo' option might get deselected in 'Contact'. If you too are looking for ways to delete such data, then you can simply erase SFDC leads in Marketo by selecting 'SFDC Type IS Contact' option. However, you need to check that the 'DELETE FROM CRM = FALSE' option is checked during the Marketo contact removal process. But then, contacts and leads from Marketo will not be synced with the SFDC – for this, you

need to set up a 'force update' field to force leads and contacts to be synced with the SFDC. You need to add values for all leads and contacts using a data loader tool. With this, you will be able to ensure updates for all contact data when it is ready for sync with Marketo.

vi. What to do with the domain alias during the migration to Marketo?

Here are two situations when users want to update the domain alias of landing pages after migrating to Marketo.

Scenario 1 – when you are updating the domain URL of a campaign instance to a different URL, will the links of current landing pages as well as image assets and other related files get automatically updated to the new domain name? Though the default domain name will be updated automatically, but users need to ready a domain alias to enable all the URLs to function with the new URL.

Scenario 2 – In another common situation where users are transitioning Marketo instance from one business to another business, during migrating to the Marketo platform. In this case, can both company websites retain current websites with leads getting generated from both sites be stream to the second domain in Marketo? Do users need to create domain alias for the company A to B in order to access all images, landing pages, forms and files to the campaign instance of company B? Yes – you need to create the domain alias for company A in order to get DNS entry in the DNS zone of company A. Write the CNAME entry as "Go" "[accountstring].mktoweb.com" [wherein you need to add the value of the account string. Going forward, all the landing pages of campaign instances can be linked to both domains of company A and company B.

About Marrina Decisions

Marrina Decisions is driven by people and for the people in your organization for all your marketing operations and technology needs.

We are your one-stop partner covering all spectrum of marketing operations starting from building, designing, managing, migrating, training and other areas. We have acquired experience and expertise over the years of serving clients of all sizes whether startup, small and medium businesses or large enterprises and clients from diverse industries.

Our services do not end at assisting our clients in various stages of marketing operations, but we also extend tutorials, on-demand and scheduled training sessions for your teams to help them become experts in handling various marketing platforms and campaign like a pro!