



#MWD16

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MARKETING & SALESFORCE

Why and what #AwesomeAdmins should know about their marketing automation

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It's Marketing. It's Automated.

...it's kind of creepy.

And it's usually syncing with your Salesforce instance, ladies and gents.



#AwesomeAdmins, meet #MOPs

- Support users, globally and in daily functions
 - Support data cleanliness through metadata structure and automation
 - Passionate about their platform and driven to be better
 - Use a lot of jargon and are only *really* understood by other #awesomeadmins
- Support users, globally and in daily functions
 - Support data cleanliness through metadata structure and automation
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 - Use a lot of jargon and are only *really* understood by other MOPs

Cross the Sync Bridge



MOPs are wary of outsiders. They sometimes have a hard time proving their worth to the company, since Marketing Automation isn't as matured in the market as CRM. Approach them slowly and directly, so they have time to see you. Bring a treat, and be well armed...with knowledge.

-2015 Study, "My Journey with MOPs"

Terms to Know

ABM

CTA

CTR (or CTO)

Inbound

MQL

Personas

SEO

Smart List

SQL

Variable Terms

Campaigns/Workflows

Programs/Campaigns

Trigger

Leads/Contacts/Customers

Story Time!

Things to Look For


Expected Response (%)	0.00%
Num Sent	0
Parent Campaign	
Created By	<u>Samantha Safin</u> , 1/28/2015 8:34 AM
Description	

Look for an Integration User on Campaigns (instead of actual users)

	HubSpot Intelligence	Lead Owner
Ind	Label: HubSpot Intelligence	
Las	Name: HubSpot_Inc.HubSpot_Intellig	
	Type: Lookup	
L	Transfer Date	Mobile

Branded things in your instance (they come with special permissions!)

Home **Marketo** Chatter Files Leads Accounts C

 **Marketeto Sales Insight**

Best Bets My Watch List Web Activity Anonymous V

View: My Best Bets

Doing a cursory look for integration points can help you create questions for MOPs

Questions to Ask

- How often do the platforms sync?
- What automation is in place for ongoing data management?
- Are there any (campaigns/programs/insert software-specific name here) that have a direct impact on Salesforce?
- What documentation is available about the instance?
- What documentation about Salesforce would help them?
- How are you doing today? (Maybe start here, actually)
- BONUS: What challenges do they have modeling a B2C marketing automation to match a B2B CRM?

Next Level

Now that you know each other, it's time to think about the future.

- Partner
- Plan
- Produce (Results, that is)





But I don't
have a
mop...



Then you're in for a fantastic
journey.

Congratulations on Your new Kingdom

Most of this still applies. Your friends in marketing will use the terms we covered.

You still NEED to sleuth your org for MA Integration Users, APIs, Apps, Objects, or Fields.

And you should still ask those questions...but contact your MA platform rep.

Where to Start Your Journey

- Find your platform's support site (or check out the list I've provided)
- Contact your rep (it's their job to make you successful, so you stick with their product)
- Join the community (everyone's copying Salesforce these days)



Your Transformation is the Company's Transformation

- Treat your Marketing Automation with the same care that you treat your org
- Double effort - other peripheral products should function with BOTH Salesforce and your MA (if applicable)
- Start learning about marketing - not just the software but the science and art of it
- Brush up on your HTML and CSS, just in case
- Bridge the gap (you will hold the torch for both Marketing and Sales, and with great power comes great responsibility)
- You're going to be #awesome

That's a Whole Lot...

Yes...

- New vocabulary
- New goals
- New responsibilities

...and no

- You've done it before
- (even if you don't remember)
- You're not alone

And you've got backup

- [Conversation Guide](#) (a more detailed list of questions that can help you get started)
- [Pardot Knowledge Base](#)
- [Marketo Docs](#)
- [Hubspot Support](#) (also check out their blog because it has great content about Inbound and ABM)
- [Marketing Profs](#) (great resource on marketing best practices; free and paid membership options)
- [Pragmatic Marketing](#) (courses and webinars on marketing, mostly paid)
- [Sales Cloud for Marketing](#) (series on how to use Sales Cloud with Marketing Automation - Marketo specific, but can be used with any MA)

questions

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