



best practices

Organizing Your Marketo Instance



V2.3

why

Purpose

- Keep your instance free from clutter
- Find items quickly
- Easily select groups of Programs/Assets
- Accelerate pick lists
- Make reports easy to sort and read

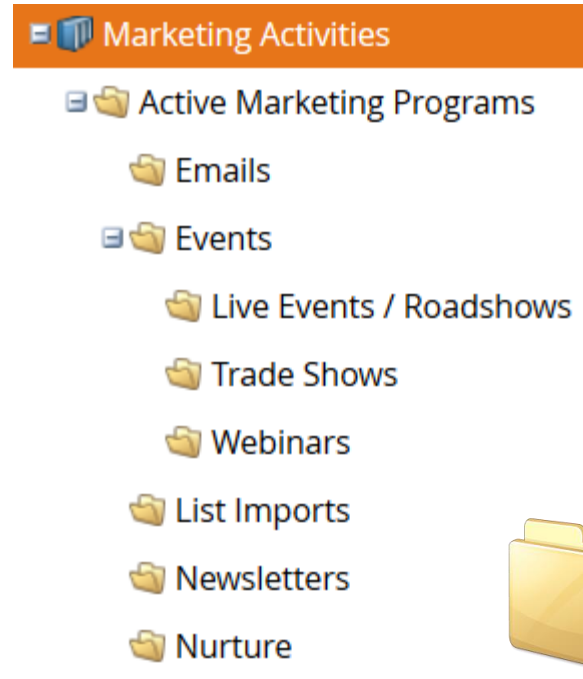


Organizational Structure

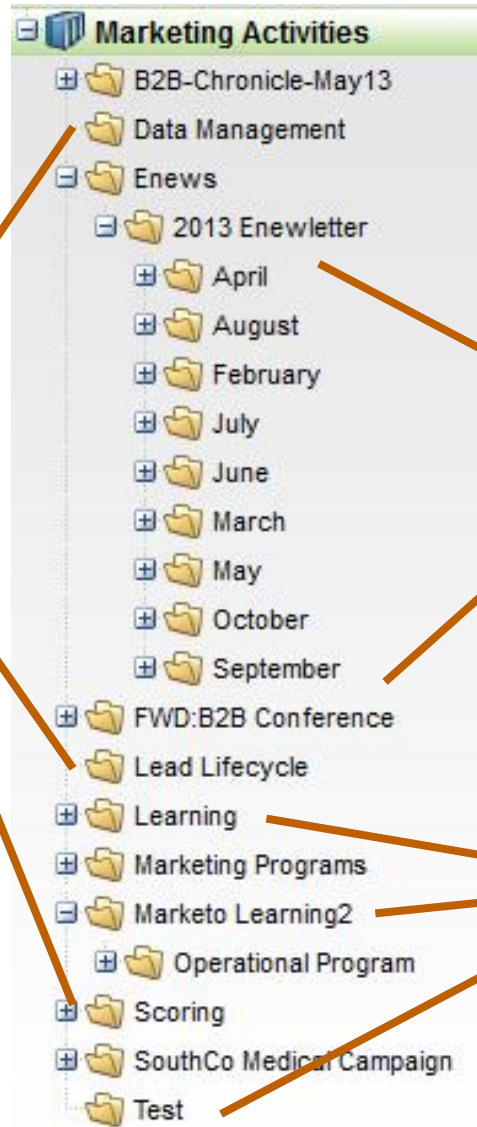


About Folders

- Folders are for Users
- Folders have no influence on reporting
- Folder names must be unique
- Folders are sorted alpha-numerically
- Advanced Users:
You can add MyTokens to Folders, and reference them in all Programs inside of this Folder



Organizational Structure - Not Well Planned



Operational Folders mixed-in with Marketing Activities

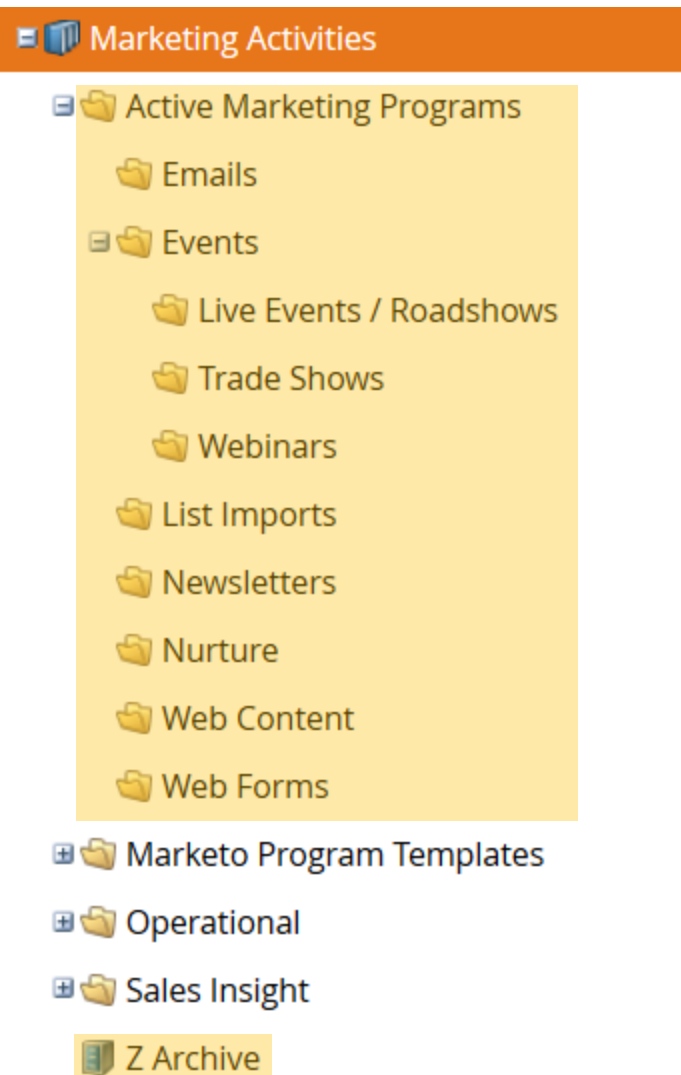
Alphabetic Folders – not in sequence of Months, not repeatable for future years

Learning and Testing Folders mixed-in with Marketing Activities

No Archive



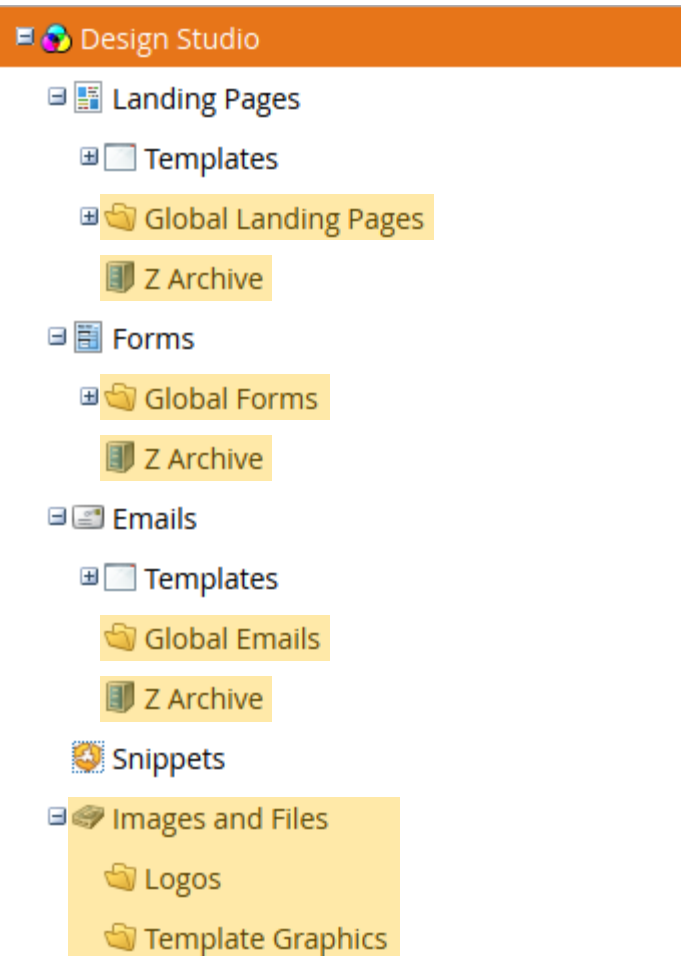
Seeded Marketing Activity Folders



- Five Main Category Folders
 - Focus on what users are working on
 - Minimize clutter in the tree
- Active Marketing Programs for everything that is running or being prepared to run
- An Archive for Programs that are no longer active
 - Users can continue to report on them
 - They will not clutter-up pick lists in Triggers, Filters, or Flow Steps
 - Name starts with “Z” or “_” to show at bottom of the tree



Seeded Design Studio Folders



- “Global” Folders for reusable Forms, and Emails, and Landing Pages
- Archives for assets that are no longer active
 - Users can continue to report on them
 - They will not clutter-up pick lists
 - Name starts with “Z” or “_” to show at bottom of the tree
- Folders for Images and Files



Seeded Lead Database Folders

Lead Database

- System Smart Lists
- My Smart Lists
 - Exclusion Lists
 - Operational Lists
 - Z Archive
- My Lists
 - Internal Lists
 - Z Archive
- Segmentations
- Field Organizer

- Smart Lists and My Lists are organized by purpose of the list, e.g. Exclusion, Internal, Operational
- Archives for lists that are no longer active
 - They will not clutter-up pick lists
 - Name starts with “Z” or “_” to show at bottom of the tree



Program Naming Conventions



Program Naming - Random

No alpha-numeric sorting and grouping by Program Type, Age of Program, or other attributes

Program Performance		Report	Setup	Subscriptions				
New ▼		Report Actions ▼						
All Time								
Program ▲	Channel	Total Me...	New Na...	New Na...	Success	Success %		
A Look Inside the Mind of the Engineer	Email Blast	0	0	0	0	0		
April 2013 Newsletter	Email Blast	0	0	0	0	0		
August 2013 Newsletter	Email Blast			0	0	0		
B2B Chronicle	Email Blast			0	0	0		
B2B Ideas Worth Sharing	Email Blast			00	0	0		
Client Invitation Email	FWD B2B Co			0	23	8.71		
Data Management Program	Operational			0	0	0		
free trial request	Content			0	0	0		
Influencers Email	FWD B2B Con			0	17	12.14		
July 2013 Newsletter	Email Blast			0	0	0		
June 2013 Newsletter	Email Blast			0	0	0		
Lead Lifecycle	Operational			0	0	0		
Lead Scoring TEst	Operational	0	0	0	0	0		
March 2013 Newsletter	Email Blast	0	0	0	0	0		
May 2013 Newsletter	Email Blast	0	0	0	0	0		
Medical Campaign	Southco Medical	3	1	33.33	2	66.67		
October 2013 Newsletter	Email Blast	264	0	0	0	0		
Outreach - TRAINING	Email Blast	2	0	0	0	0		
Post Event Emails	Email Blast	0	0	0	0	0		
Prospect Invitation Email	FWD B2B Conference	2663	0	0	26			
Prospect Postcard List	Email Blast	1214	1211	99.75	0			
September 2013 Newsletter	Email Blast	264	0	0	0			

Channel Column is only available in Program Performance and RCA Reports



Program Naming - Well Done

Program Performance	Report	Setup	Subscriptions		
New ▼ Report Actions ▼					
All Time, Cost Period					
Program ▲	Channel	Total Me...	New Na...	Success	Success %
EB 13-09-09 NA IS2	Email Blast - Basic	23304	0	25	0.11
OA 13-09 Global Recruiter UK	Online Advertising	5	2	5	100
OA 13-09 LinkedIn NA	Online Advertising	372	209	372	100
OA 13-09 LinkedIn UK	Online Advertising	4	1	4	100
OA 13-09 OnRec UK	Online Advertising	4	0	4	100
OA 13-09 RBC NA	Online Advertising	3	0	3	100
OA 13-09 Recruiter.co.UK	Online Advertising	3	1	3	100
OA 13-09 Recruiting Blogs NA	Online Advertising	6	2	6	100
OA 13-09 SIA NA	Online Advertising	12	3	12	100
OA 13-09 SIA ROW	Online Advertising	0	0	0	0
OA 13-09 SIA UK	Online Advertising	3	0	3	100
OA 13-09 UK Recruiter	Online Advertising	3	1	3	100
RS - Los Angeles - 10.01.2013					
RS - San Francisco - 10.03.2013					
WBN 13-09-26 Email Migration We...	Webinar - Basic	787	3	0	0
WBN 13-10-16 NA IS2 Webinar	Webinar - Basic	25353	11	51	0.2
WBN 13-10-24 cube19 Webinar	Webinar - Basic	6526	10	14	
WC 13-09 Online Ads Contact Sale...	Web Content	0	0	0	
WC 13-09 Online Ads Contact Sale...	Web Content	0	0	0	
WC 13-09-09 NA IS2	Web Content	28	1	12	42.86

Oops – I broke the naming convention!

Alpha-numeric sorting and grouping by Program Type and Age of Program – easy to compare similar type Programs



Program Naming Conventions

A good naming convention...

- Is as short as possible, and as long as necessary
- Makes Programs and Assets easy to find and identify
- Allows easy referencing groups of programs or assets based on common strings
- Allows sorting reports based on Program Type, Date, and other attributes
- Starts with the broadest attributes (e.g. Geo-location, Business Unit, Product Line), followed by more detail (e.g. Program Type, Year, Month, Date)

Note: Program Names are part of every Local Asset Name as well.

Example: **“WBN 2014-06 3D Printing.Invitation Email”**

This is the invitation email for a webinar about 3D printing, held in June of 2014



Program Naming Conventions - Recommended Baseline Format

We recommend to start with the following format:

[Abbreviation of Program Type] [YYYY]-[MM]-[Optional DD] [Brief Description]



Program Naming Conventions - Recommended Baseline Format

We recommend to start with the following format:

[Abbreviation of Program Type] [YYYY]-[MM]-[Optional DD] [Brief Description]

You will need agreed upon abbreviations of program types to implement this naming convention, e.g.

- **ES** – Email Send
- **ENG** – Engagement Program
- **LE** – Live Event
- **LI** – List Import
- **NL** – Newsletter
- **OA** – Online Advertising
- **TS** – Tradeshow
- **WBN** – Webinar
- **WC** – Website Content
- **WF** – Web Form



Program Naming Conventions - Recommended Baseline Format

We recommend to start with the following format:

[Abbreviation of Program Type] [YYYY]-[MM]-[Optional DD] [Brief Description]

Examples:

- ES 2015-03-27 Widget XYZ Intro
- NL 2015-11 Newsletter
- OA 2015-10 Google PPC
- TS 2015-04-06 Trade Show Name Here
- WBN 2015-04-22 Webinar Topic Here



Program Naming Conventions - Customize For Your Business Needs

Enhance this basic naming convention as needed:

- Prefix it with an abbreviation of the Product Line, Geo-Territory, or Language Region
- The sequence of prefixes and other naming elements should be determined by the desired sort order in the reports
- Typically, the sequence is from broad attributes (e.g. Geo-Location or Product Line) to more detailed attributes (Year, Month, Date)



Program Naming - Things to Avoid

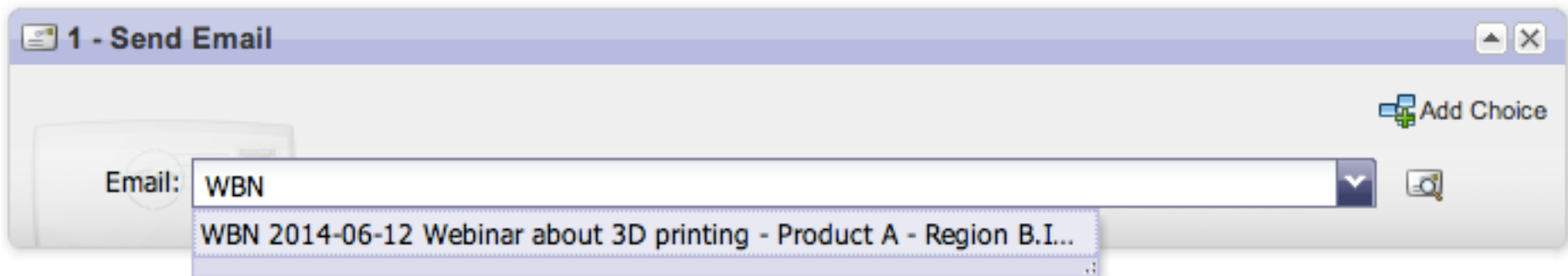
Things you should AVOID:

- Starting with the date
- Putting the month before the year
- Using single digit months or days
- Using “dots”
- Over-complicating – avoid using too many elements in the naming convention
- Allowing Program names to become longer than the pick lists in your Triggers, Filters, and Flow Steps
- Use long naming conventions instead of Program Tags

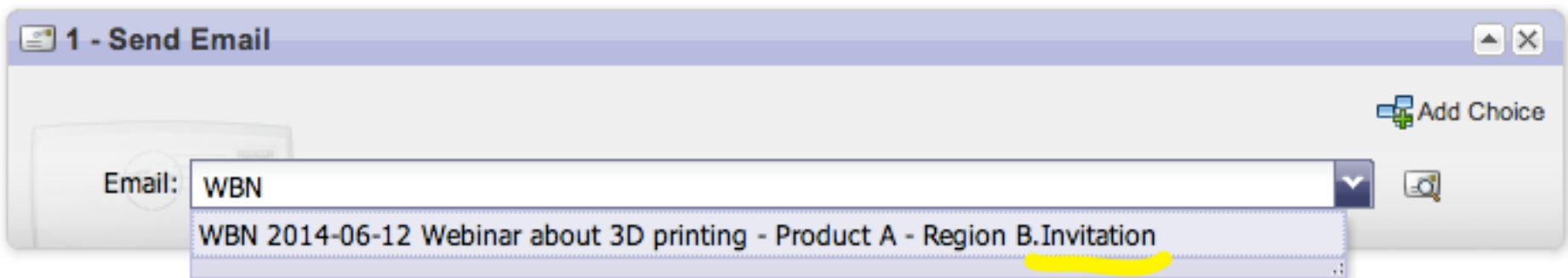


Program Naming - Name Too Long

- When your Program Name is too long, you can't see the name of the email:



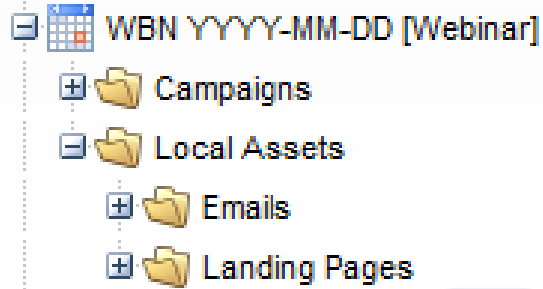
- Unless you resize the drop-down:



Program Foldering



Program Folder Organization



Consistent Foldering inside of the Program Templates...

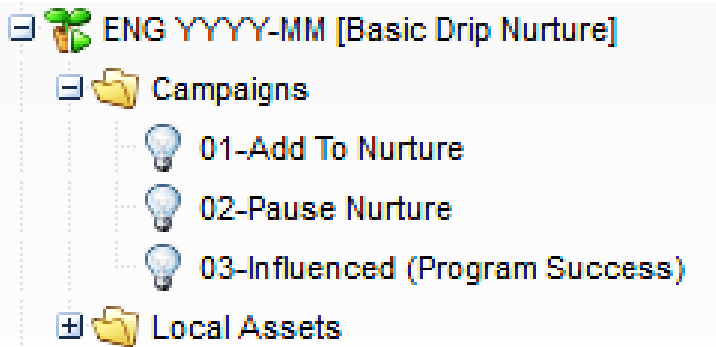
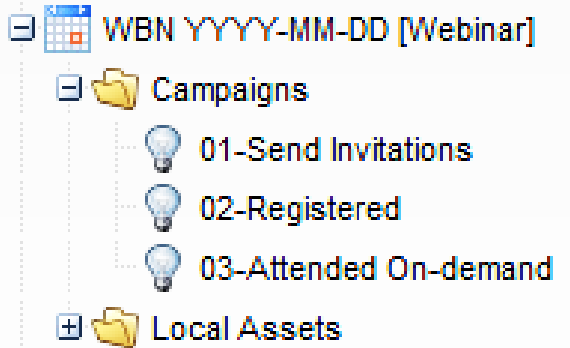
- Makes it easy to find Campaigns and Assets
- Emphasizes the concept of Local vs. Global Assets
- Should be agreed-upon between all Marketo Users



Smart Campaign Naming Conventions



Smart Campaign Naming Convention



Format:

[Two Digit Number]-[Campaign Description]

***Goal:** Campaign name should still be meaningful after the Program was cloned*



Smart Campaign Naming - Things to Avoid

Inside your Program's Campaign Folder, organize your Smart Campaigns...

- DO NOT use a “dot” to separate number from description
 - the dot is reserved for separating the Program Name from the Smart Campaign or Asset Name
- DO NOT repeat any of the information contained in the Program Name
 - It would duplicate information
 - It would create extra work when you clone the program, and the name of the campaign would no longer match the new program



Asset Naming Conventions:

- Emails
- Forms
- Landing Pages
- PDFs
- Lists
- Custom Fields



Local Assets

Inside your Program's Local Assets Folder...

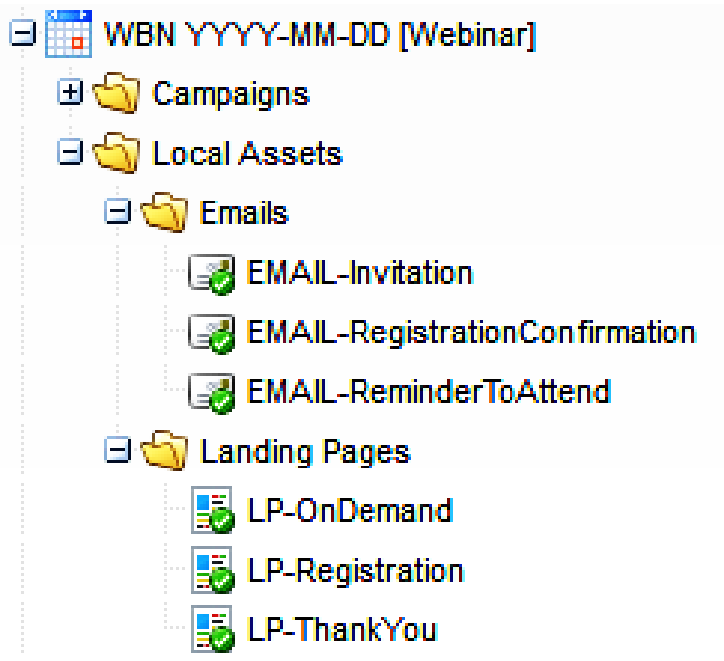
- Include Emails, Landing Pages, Forms, Lists and Reports that are specific to this Program (reusable “Global Assets” should live in the Design Studio, Marketing Database, or Analytics section)
- Create subfolders for each type of Local Asset



Asset Naming - Local and Global Assets

Format:

[Abbreviation of Asset Type]-[Brief Description of Purpose]



Suggested Abbreviations:

- **EMAIL** – Email
- **ALERT** – Alert Email
- **LP** – Landing page
- **FORM** – Web Form
- **EXCL** – Exclusion List

Optional:

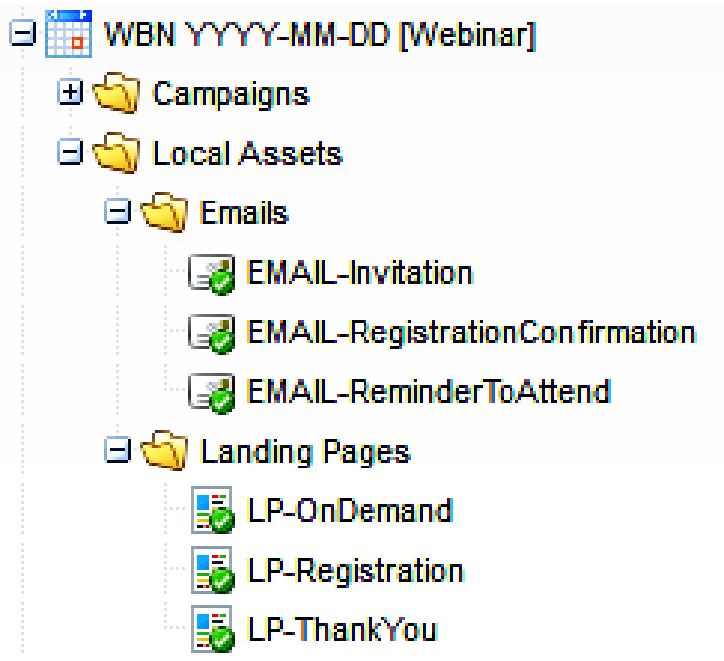
- **LST** – My List
- **SLST** – Smart List



Asset Naming - Local and Global Assets

Format:

[Abbreviation of Asset Type]-[Brief Description of Purpose]



Examples:

- EMAIL-Outbound
- EMAIL-Invitation
- EMAIL-InvitationReminder
- EMAIL-ThankYou
- ALERT-NewMQL
- FORM-ContentDownload
- LP-Registration
- LP-ThankYou
- EXCL-Competitors
- EXCL-Employees



questions

Ask Now!



thank you

Hope find this information useful.

