



10 WAYS TO REDUCE BAD DATA IN MARKETO

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WHAT IS BAD MARKETO DATA?

The point of Marketing automation systems like Marketo is to automate communication throughout the customer lifecycle. When utilized correctly, Marketo can be a major asset for marketing and sales.

One of the biggest challenges Marketo admins face when trying to automate communication is bad data. Duplicates, nonstandard data, incomplete data, and inaccurate data wreak havoc on marketing campaigns every second.

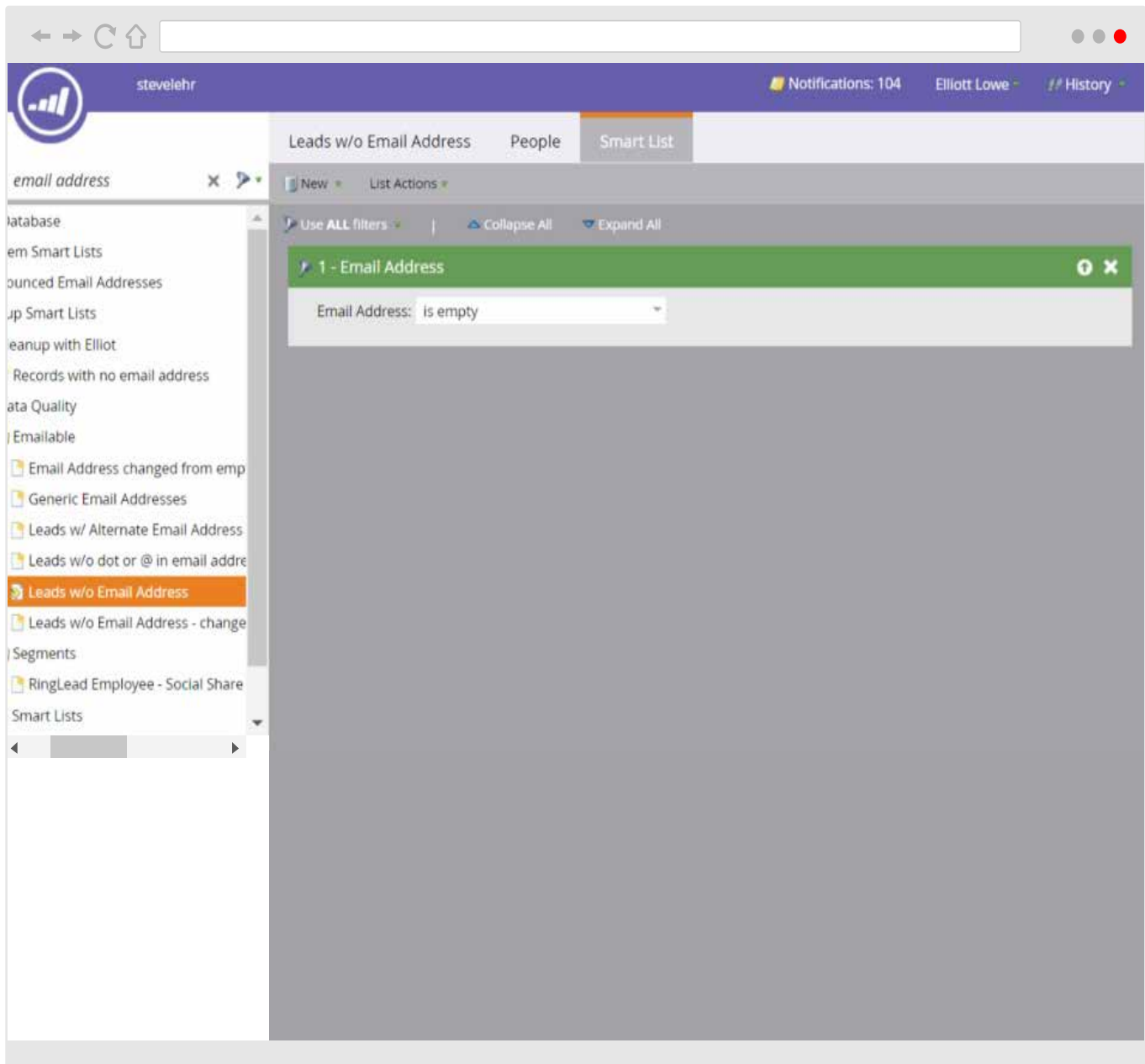


In these pages, I will teach you how to identify & reduce bad data in Marketo.

**THIS PROCESS WILL SAVE YOU \$\$\$ ON
MARKETO RECORD COSTS AND INCREASE
EFFICIENCY IN ALL OF YOUR CAMPAIGNS!**

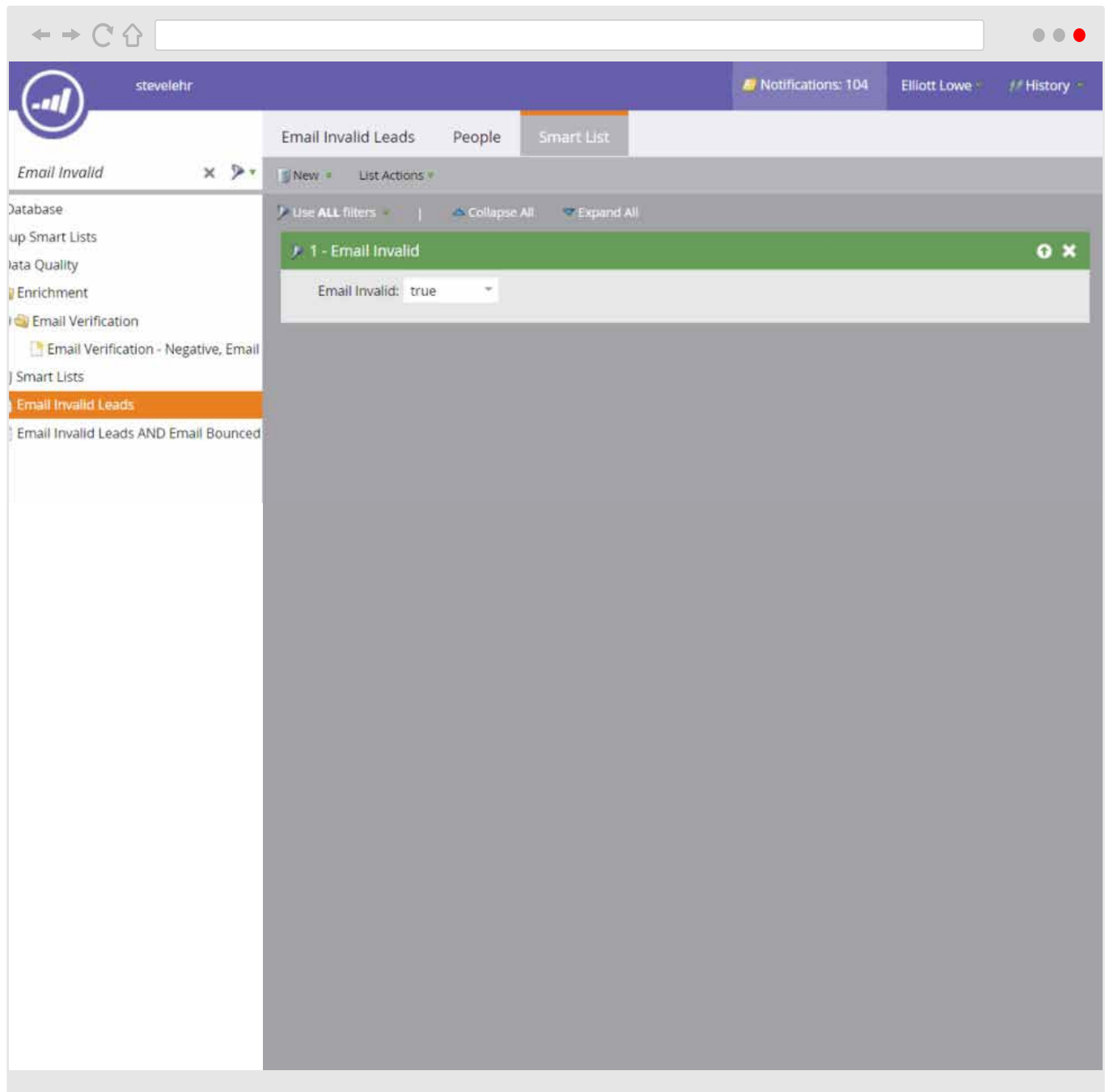
01

The first step to cleansing Marketo data starts with creating a smartlist to identify records with no email addresses in Marketo. Sometimes Salesforce & other systems can sync data into Marketo with no email. Records are pretty much worthless in Marketo if they have no email address. Feel free to purge these records from Marketo and leave them in your CRM. If you leave the records in your CRM, have Marketo tech support create a sync filter that prevents records without an email address from syncing to Marketo.



02

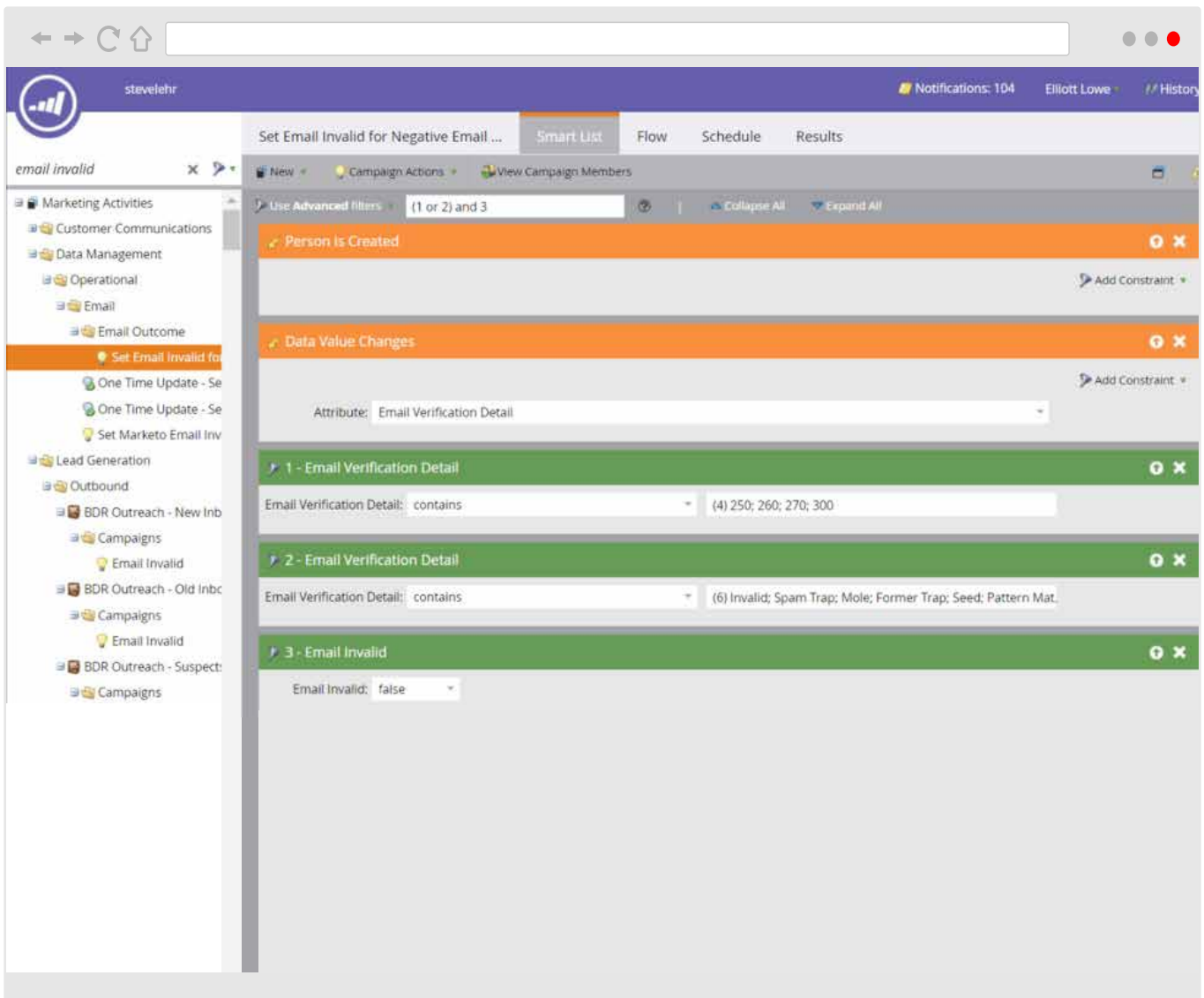
Use the Marketo Email Invalid field(true/false). Create a smart list to identify records that have hard bounced. Any email that has been set to true in this smart list is a hard bounce. If you want to prevent these records from being synced back into Marketo, Marketo tech support will need to create a more sophisticated sync filter.



03

Use an email validation provider like RingLead to identify spam traps & invalid emails. Create a smart campaign that sets the Email Invalid field to true when this occurs as illustrated in the two screenshots below.

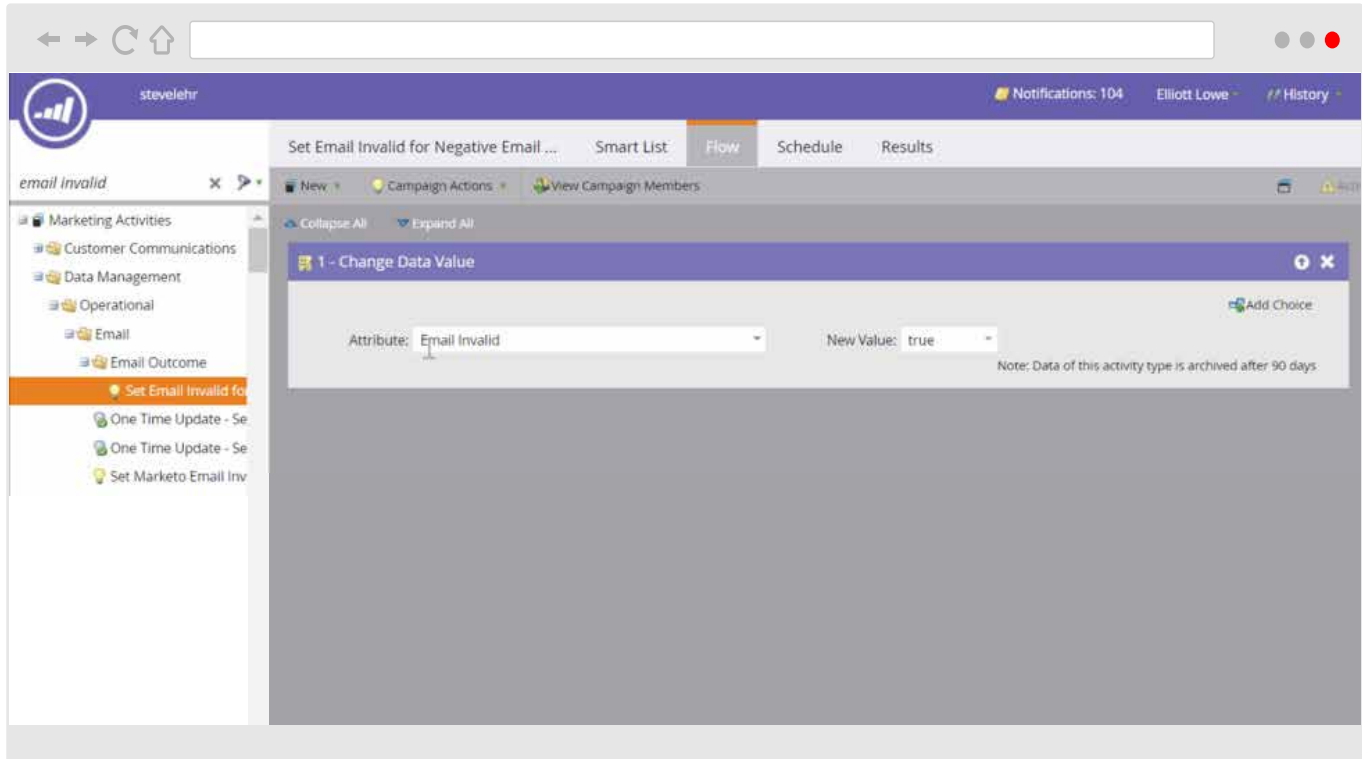
Smart List that selects records when their email validation results are negative



The screenshot displays the Marketo Smart Campaign interface. The left sidebar shows a navigation menu with categories like Marketing Activities, Customer Communications, Data Management, Operational, Email, and Email Outcome. The 'Email Outcome' section is expanded, showing 'Set Email Invalid for Negative Email ...' as the selected item. The main content area shows the 'Smart List' configuration for this campaign. The 'Use Advanced Filters' section is set to '(1 or 2) and 3'. The filters are as follows:

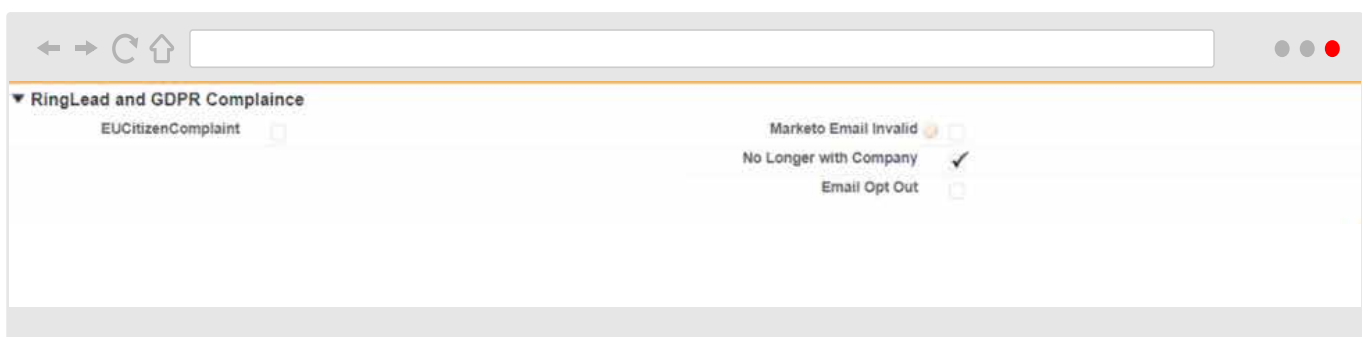
- Person is Created** (Orange bar)
- Data Value Changes** (Orange bar)
 - Attribute: Email Verification Detail
- 1 - Email Verification Detail** (Green bar)
 - Email Verification Detail: contains (4) 250; 260; 270; 300
- 2 - Email Verification Detail** (Green bar)
 - Email Verification Detail: contains (6) Invalid; Spam Trap; Mole; Former Trap; Seed; Pattern Mat.
- 3 - Email Invalid** (Green bar)
 - Email Invalid: false

Flow action that sets email invalid field to true:



04

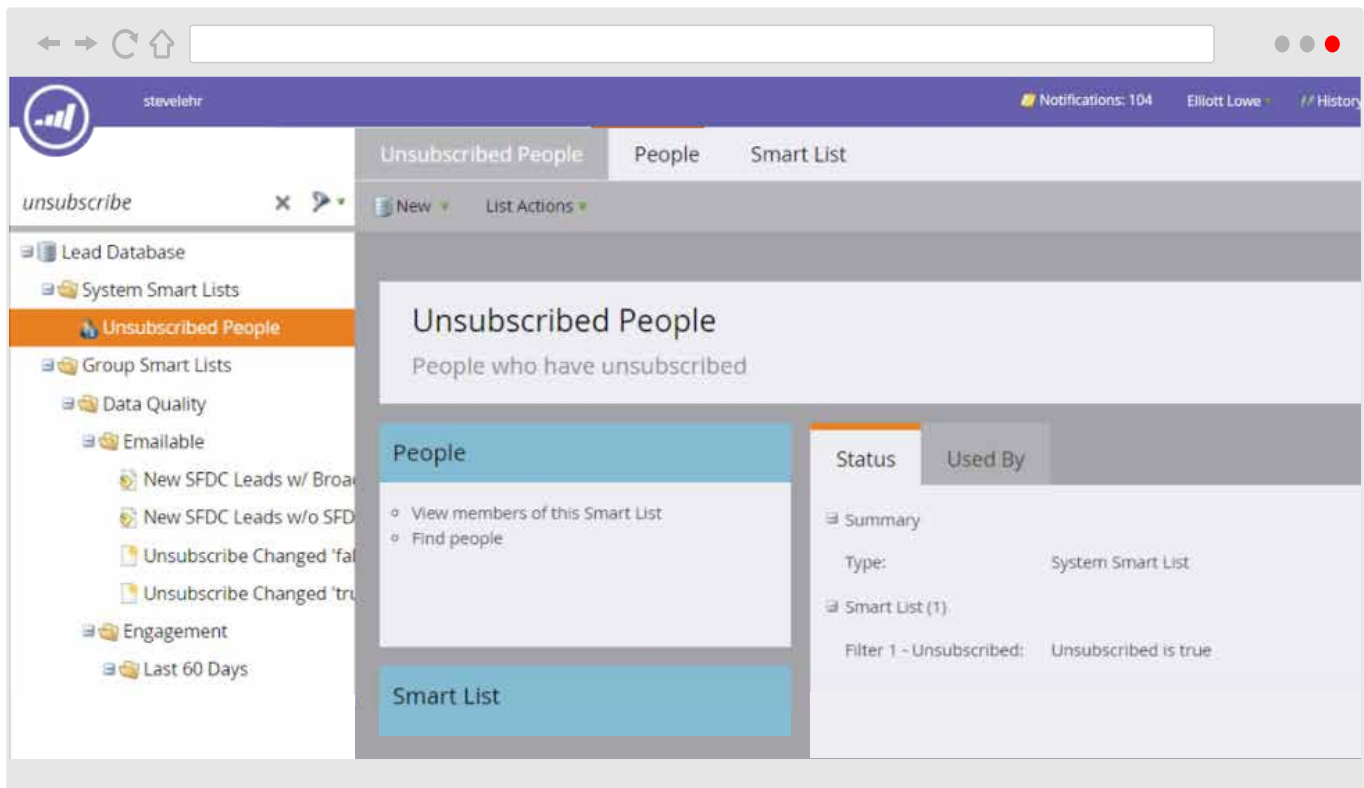
Create a checkbox field in CRM for sales reps to select when they find that someone is no longer at the company. You can remove these records when appropriate. (Send a report of these records to RingLead to reconnect and find new contact information)



05

Use the Marketo system smart list Unsubscribed People. Customers may unsubscribe from your promos, but they may receive operational emails. If prospects opt out, you may remove them from Marketo, or continue to monitor their page visits to your website and other digital activity.

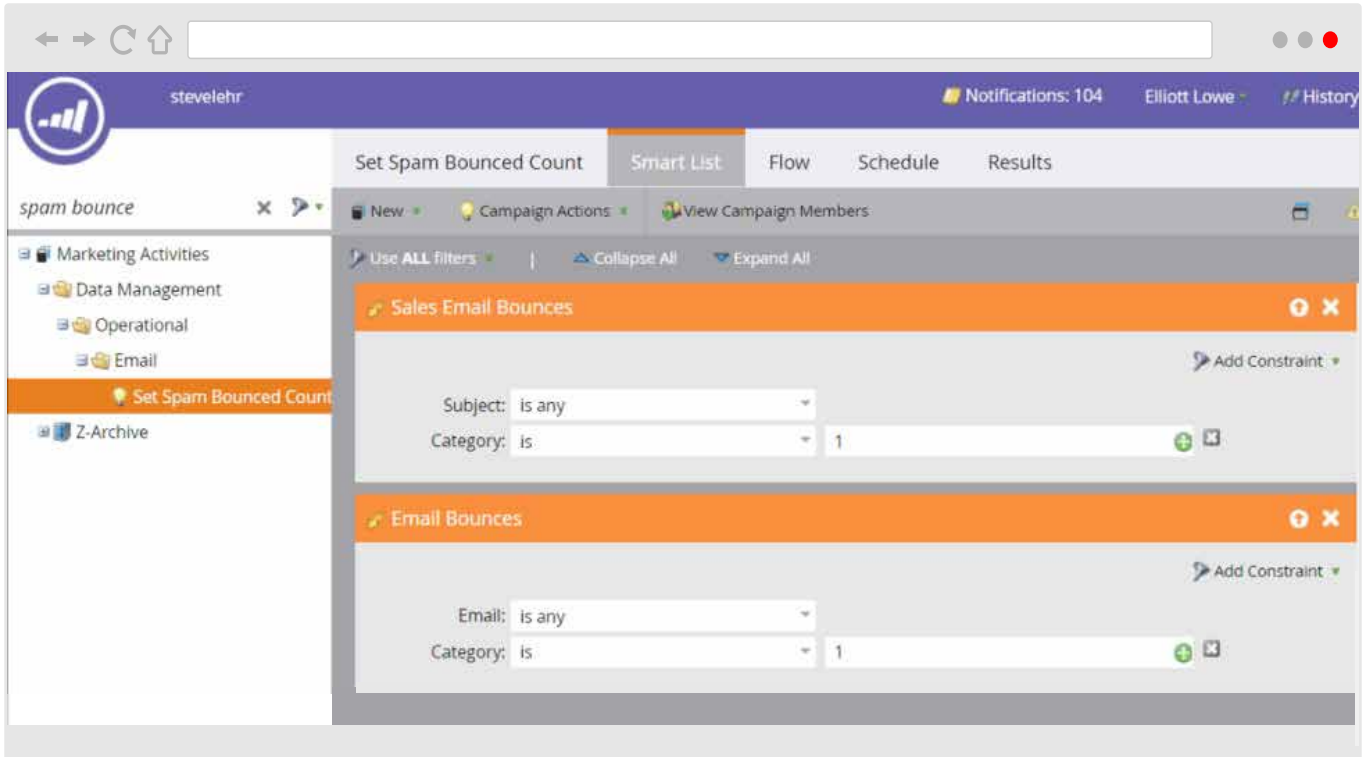
You may even want to create a smart campaign that when they submit another form, it changes their unsubscribe field value to false.



05

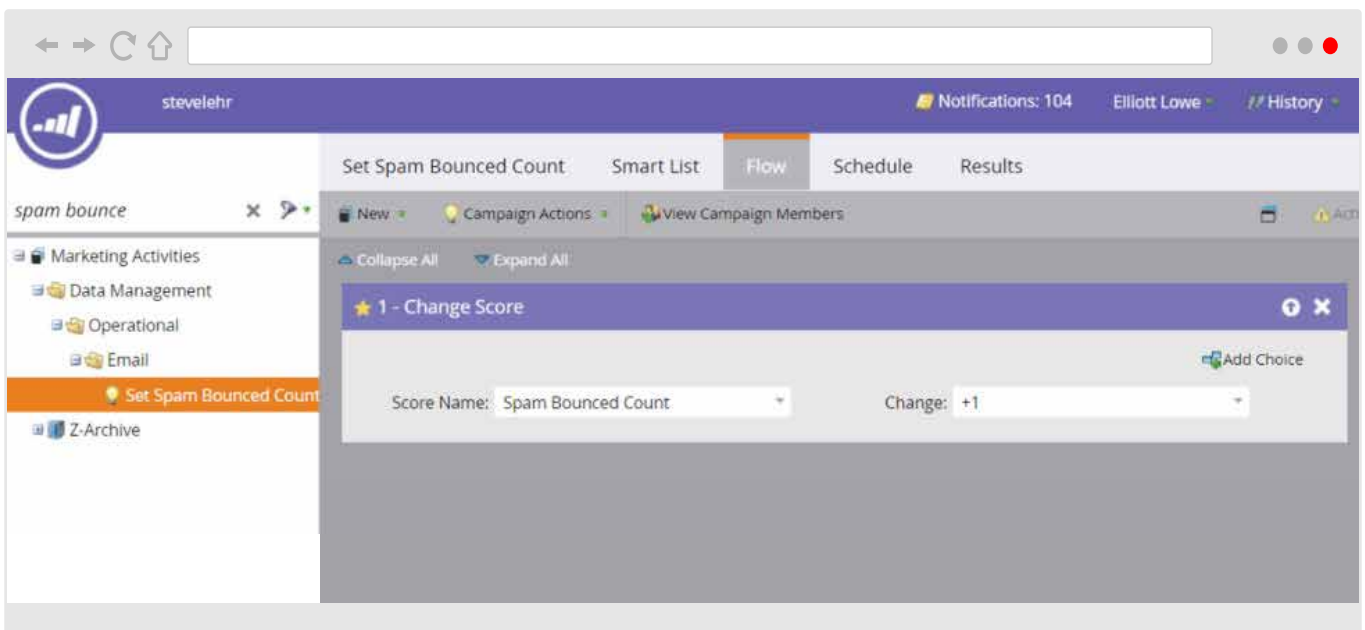
Create a Spam Bounced Count score field in Marketo. Then create a smart list that increments the Spam Bounced Count field every time a Category 1 (spam) bounce occurs as illustrated in the two screenshots below. If records have a spam bounce more than a couple times in a row, consider removing them.

Smart list that selects records each time a spam bounce occurs



The screenshot shows the Marketo interface for configuring a Smart List named "spam bounce". The left sidebar shows a navigation menu with "Marketing Activities", "Data Management", "Operational", "Email", "Set Spam Bounced Count" (highlighted), and "Z-Archive". The main panel has tabs for "Set Spam Bounced Count", "Smart List", "Flow", "Schedule", and "Results". The "Smart List" tab is active, showing two filter sections: "Sales Email Bounces" and "Email Bounces". Both sections have "Subject: is any" and "Category: is 1" filters. The "Add Constraint" button is visible for each section.

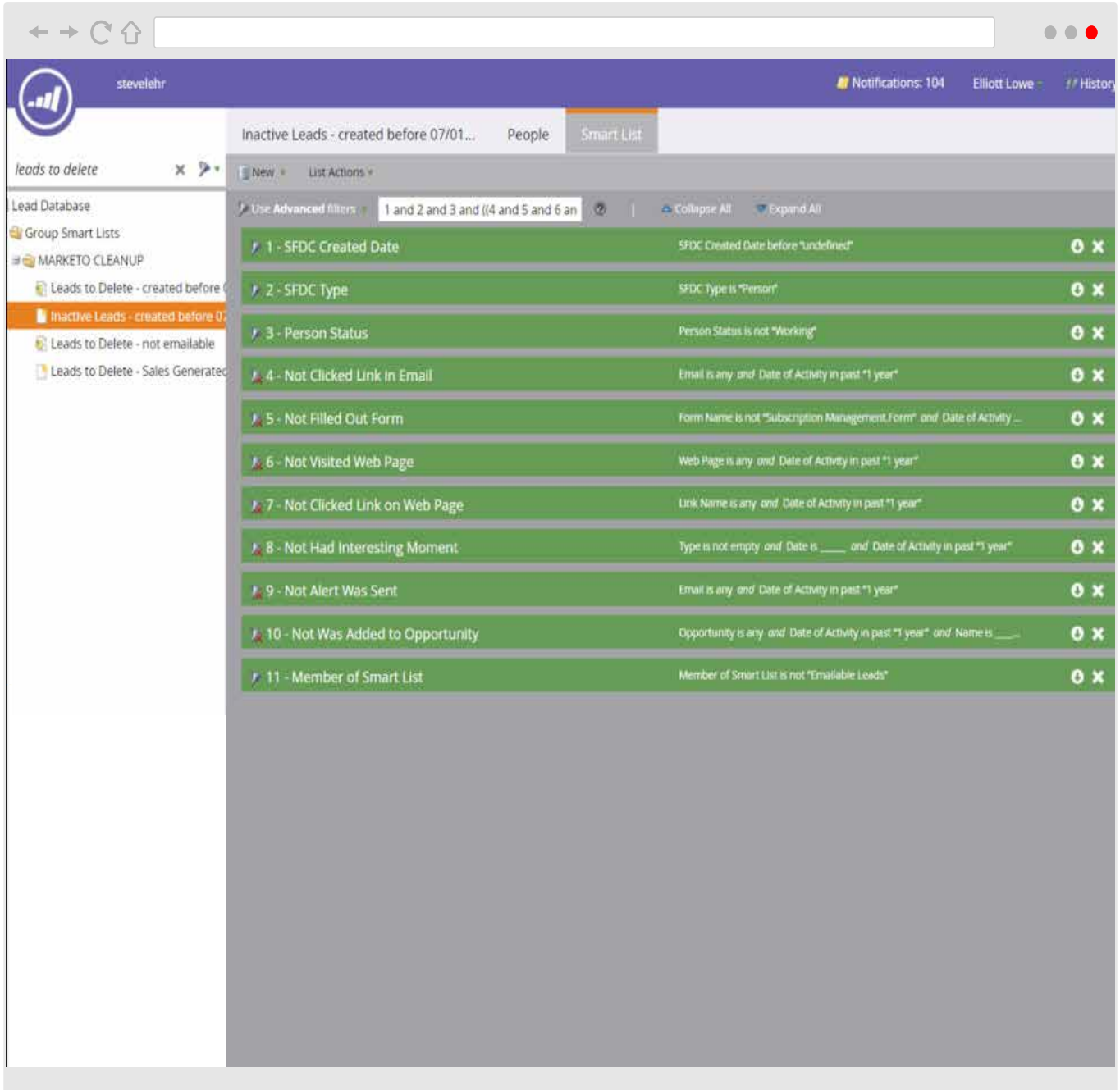
Flow action that increments the Spam Bounced Count



The screenshot shows the Marketo interface for configuring a Flow action named "spam bounce". The left sidebar is the same as the previous screenshot. The main panel has tabs for "Set Spam Bounced Count", "Smart List", "Flow", "Schedule", and "Results". The "Flow" tab is active, showing a single action: "1 - Change Score". The "Score Name" is set to "Spam Bounced Count" and the "Change" is set to "+1". The "Add Choice" button is visible.

07

Create a smart list that selects records that have not engaged in a long time as illustrated in the screenshot. You may want to send a “wake up” email and remove any records that do not respond.



The screenshot shows the Marketo Smart List interface. The left sidebar displays a list of smart lists under the 'MARKETO CLEANUP' group, with 'Inactive Leads - created before 07/01...' selected. The main panel shows the 'Smart List' configuration for 'Inactive Leads - created before 07/01...'. The filters are as follows:

Filter ID	Filter Name	Filter Criteria	Filter Type
1	SFDC Created Date	SFDC Created Date before "undefined"	Exclude
2	SFDC Type	SFDC Type is "Person"	Exclude
3	Person Status	Person Status is not "Working"	Exclude
4	Not Clicked Link in Email	Email is any and Date of Activity in past "1 year"	Exclude
5	Not Filled Out Form	Form Name is not "Subscription Management Form" and Date of Activity in past "1 year"	Exclude
6	Not Visited Web Page	Web Page is any and Date of Activity in past "1 year"	Exclude
7	Not Clicked Link on Web Page	Link Name is any and Date of Activity in past "1 year"	Exclude
8	Not Had Interesting Moment	Type is not empty and Date is ____ and Date of Activity in past "1 year"	Exclude
9	Not Alert Was Sent	Email is any and Date of Activity in past "1 year"	Exclude
10	Not Was Added to Opportunity	Opportunity is any and Date of Activity in past "1 year" and Name is ____	Exclude
11	Member of Smart List	Member of Smart List is not "Emailable Leads"	Exclude

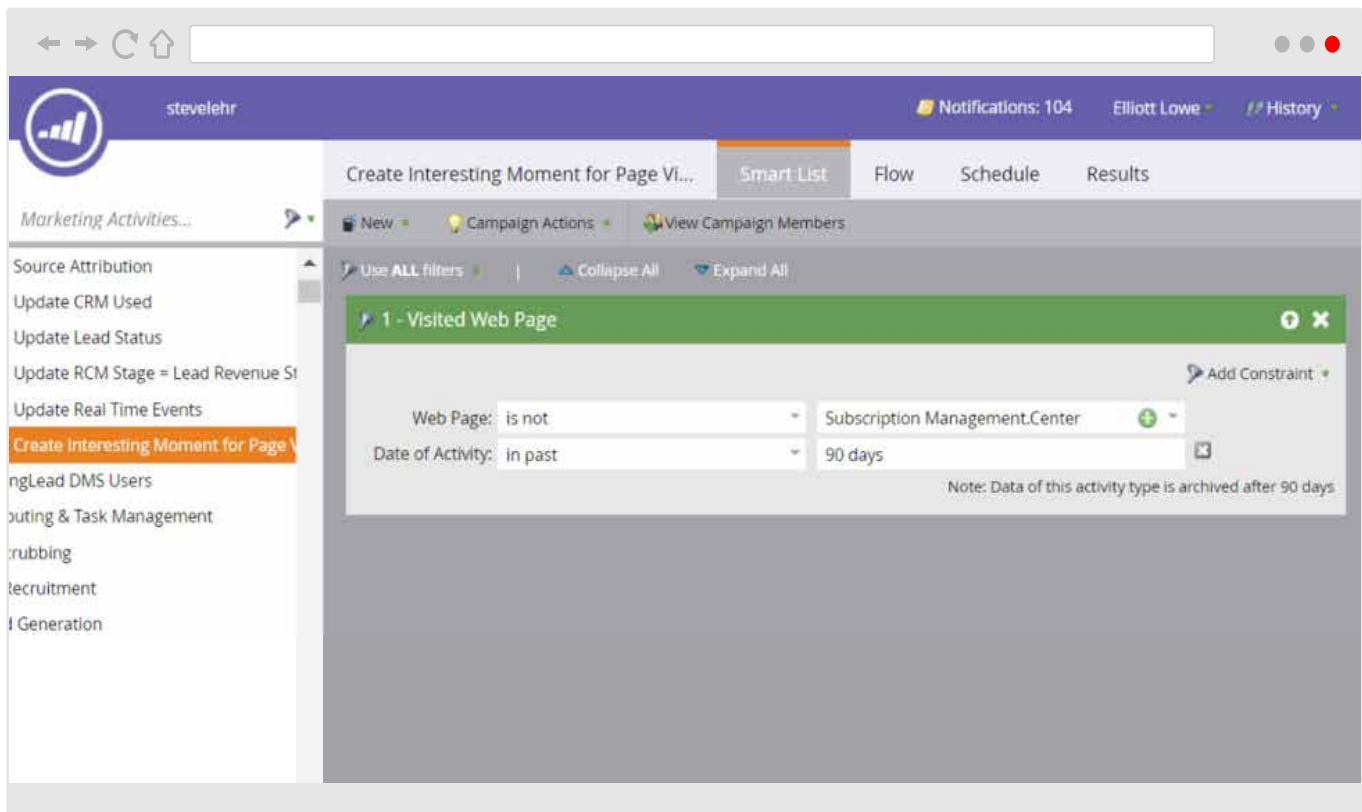
08

Are the behavioral scores of your records negative or 0? This is similar to step 7, but you may find outliers. Records that engaged years prior but over the years their scores have fallen off.

09

Marketo doesn't track website visits after 90 days, so create a smart campaign that selects records with page visits in the past 90 days at the start of each quarter and creates an Interesting Moments that you can include in your inactivity smart list (created in #7 above).

Smart list that selects records with page visits in the past 90 days

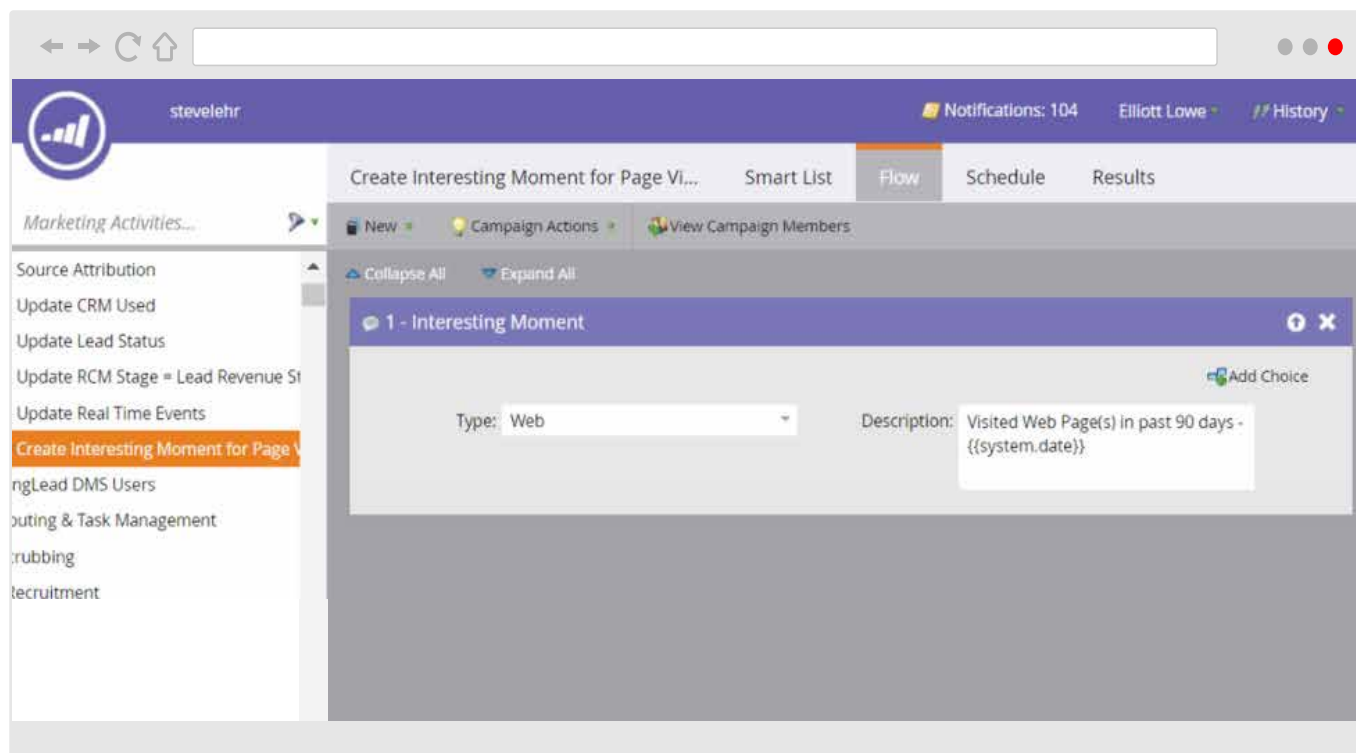


The screenshot shows the Marketo Smart Campaign interface. The left sidebar lists various marketing activities, with "Create Interesting Moment for Page Visits" highlighted. The main panel is titled "Create Interesting Moment for Page Visits" and has tabs for "Smart List", "Flow", "Schedule", and "Results". The "Smart List" tab is active, showing a filter rule named "1 - Visited Web Page". The filter rule is configured with the following criteria:

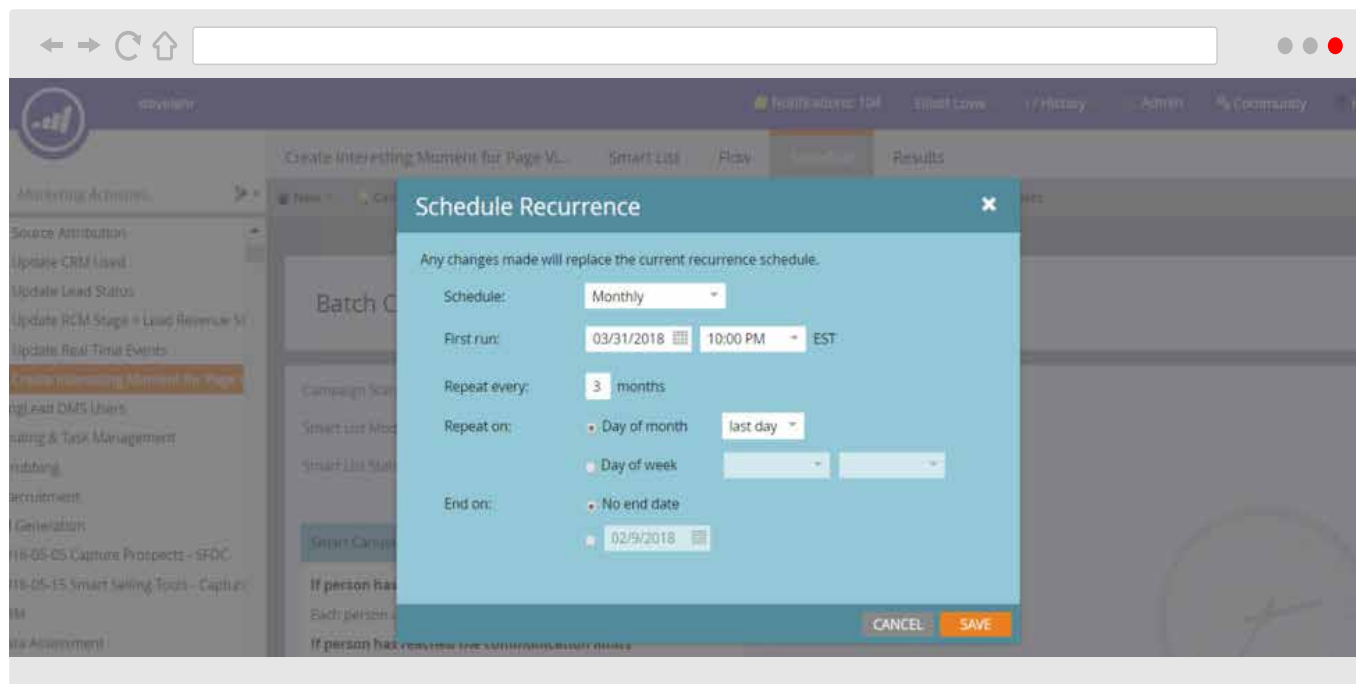
- Web Page: is not Subscription Management.Center
- Date of Activity: in past 90 days

A note at the bottom of the filter rule states: "Note: Data of this activity type is archived after 90 days".

Flow action that creates Interesting Moment



Recurring schedule on the last day of the quarter



10

Deduplicate Marketo. Aruba Networks ran a duplicate cleanup with RingLead & reduced storage from 1.2 million records down to 700,000 (Read Case Study). Most companies have high percentages of duplicates. Duplicates cause a ton of issues (speed of system, inaccurate communication, sales conflicts, storage costs, Record – Contact overlap, etc)

If you work through these 10 steps to remove bad data from Marketo, you should be able to reduce storage by 30-40%. This will speed up your Marketo instance, save money on storage, and increase efficiency & reporting of every campaign.

After cleansing your Marketo data, you should analyze it to identify ideal customer profiles. Then rebuild with clean data that matches your account and contact ICP. .



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