COOL THINGS YOU CAN DO
WITH MARKETO WEBHOOKS

BY JOE FUSARO

INTRODUCTION

Over the past few years, **Marketo** has established itself as a leader in marketing technology and has become an indispensable tool for modern marketers. Marketo can seem overwhelming at first glance, but once you understand and feel comfortable with the capabilities of the platform, you will quickly be able to build and deploy sophisticated campaigns.

In the next few pages, we will cover one of Marketo's most intriguing features that often goes overlooked by Marketo power-users: Webhooks.

What is a Webhook?

Simply (without the computer science verbiage) a Webhook allows you to send data ("post") out to a third-party system as well as receive data ("get") from third-party systems. Marketo allows you to quickly and easily build new Webhooks from the administration section in Marketo, giving you options to build powerful integrations with other systems and, as you'll see later in this guide, enhanced workflows with Salesforce, Twilio and other popular software platforms for modern marketers. Once built and tested, you can call a Webhook in a Flow step in any marketing activity.

Why is Marketo's Webhooks Feature a Big Deal?

Marketo's Webhooks feature positions the Marketo platform as the central command in customer and prospect communication for your organization.

Leveraged correctly, Marketo allows you to **orchestrate messaging across all of your platforms** and all of the departments within your organization. Not only will you be able to deliver the right message to the right customer or prospect, but you'll also be able to manage processes within your organization. Based on the customers' activities, you can trigger the right workflow **in the right system** at the right time.

How Can You Use Webhooks?

Webhooks have a variety of applications, and as long as the other platform that you're integrating with has some type of API available, you can most likely interact with that platform. Some good examples of how Webhooks can be used:

- Create Support Tickets/Cases in CRM or third-party customer support platforms like Zendesk.

- Check your CRM for existing Leads, Contacts or Accounts and prevent the creation of duplicate records.

- Send a text message to a customer or prospect.

- Append data from open source databases like Crunchbase.

- Monitor website "trolling" and automatically disable accounts based on specific activities.

Before we dig into some of the cool ways that you can utilize Webhooks, let's first cover the basic setup of a Webhook within Marketo.

To access Webhooks, navigate to the Admin section of Marketo. In the navigation panel on the left side, look for the Webhooks section, under the Integration options.
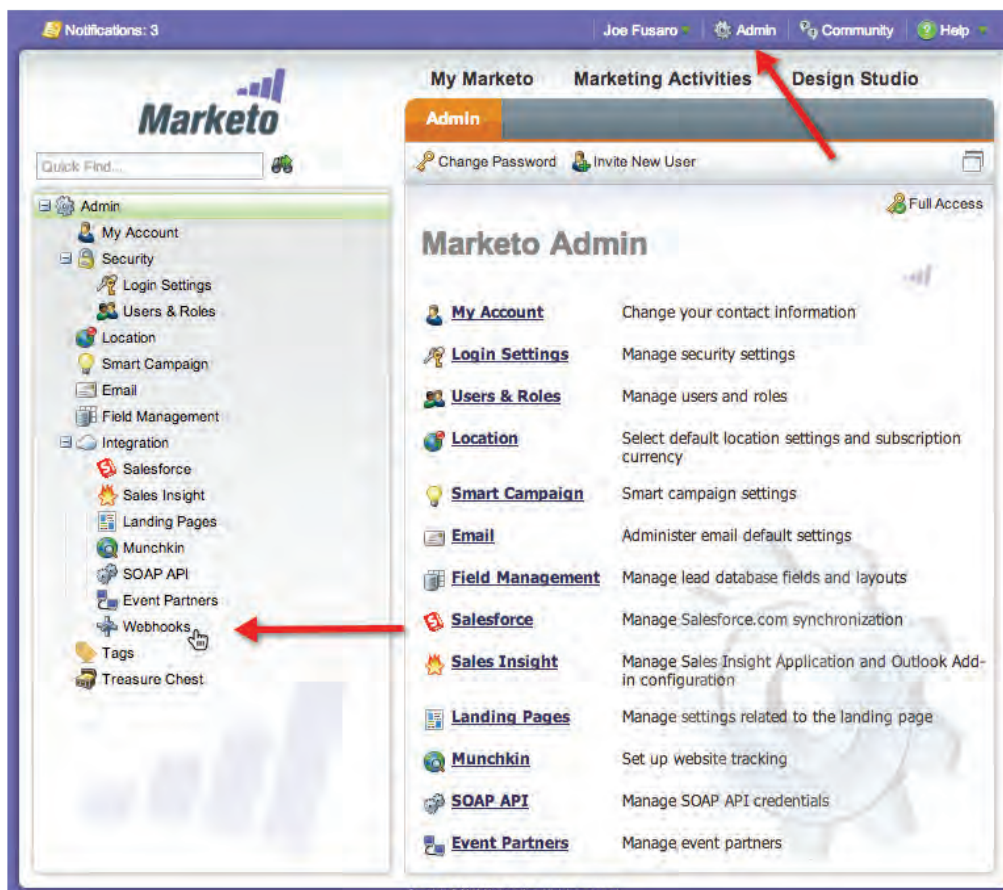
RINGLEAD

Backed by patented technology, RingLead's Data Management Solutions (DMS) is the only cloud-based, end-to-end data management solution on the planet that provides 360° care for your CRM and marketing automation system. Within DMS your team can clean, dedupe, normalize, protect, and ENRICH your data.

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Add direct dials, mobiles and social links to your key leads, contacts and accounts in real time using DMS Enrichment.

DMS addresses the demand for a product that bridges the gap between sales leaders and marketing executives by providing clean, rich data, and flawless integration.

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Create your First Webhook

The easiest way to explain a Webhook is that it gives us the ability to (a) build a way to map fields in Marketo and post that info into another system, or (b) build a template to accept information from another system. Webhooks make Marketo one of the most complete marketing automation solutions available as Webhooks are a way for Marketo to interact with a wide range of applications that can be found on Marketo's Launchpoint marketplace.

In this part of the setup, we're going to create that field mapping template (which looks a lot scarier than it actually is) and then select a few options which tells Marketo how to transmit our data.

Look for the **New Webhook** button toward the top left of your screen.

Now you should see a pop-up screen that allows us to build our Webhook.

You can fill in anything you want for **Webhook Name** and **Description**, but if you're working within Marketo with a few people it's best to document what this Webhook is for and some other information that may be helpful if others are trying to understand your processes.

URL is where you designate where you'd like to send information to, or pull information from. If you're using RingLead's Marketo Webhooks integration, this is where you would put your form action URL (https://www.salesforce.com/servlet/servlet.WebToCase?encoding=UTF-8) or any other services that have dedicated URLs that have been configured for Webhooks. We'll review a few of these in the sections below.

The **Template** is how you map the information in Marketo **(via Tokens)** to your external system. You can use any data format that accepts HTTP POST, including XML, JSON or SOAP. **Don't worry if you don't understand exactly what those are** - they're simply formats in which data is translated. Chances are that the external system that you're sending information to expects XML, JSON or SOAP as they are very popular formats.

The Template may be formatted a few different ways depending on the encoding type that you are using - but again, we won't get too technical, we'll just show you the two various types of encoding in the examples below.

Here is an example of a very simple template that maps standard Salesforce fields to Marketo tokens.


```
first_name={{Lead.First Name}}&last_name={{Lead.Last Name}}&email={{Lead.Email Address}}&company={{Company.Company Name}}&oid=00D300000007gWc
```

The values in red are the Salesforce field names. These are standard fields which are consistent across every Salesforce org in the world. These values are set to corresponding Marketo tokens which are identified by their signature double brackets. Note that we can also "hard code" values as is the case with the Salesforce Org ID ("oid") in green.

Without further ado, let's get into some of the cool ways you can use Marketo Webhooks.

#1: FLAG CUSTOMER INACTIVITY FOR YOUR CUSTOMER SUCCESS TEAM

For those of you who have a login portal that customers access frequently, you may want to be notified when your customers do not log in for an extended period of time. Why? We can think of a few reasons:

1. Primary User turnover

The active user of your product/service may have left the company and chances are slim that they conveniently notified you on their last day of work. Accordingly, it's likely that the new person assuming their position may not be aware of your product/service. The notification program that we're building here would allow your customer success team (or, in some scenarios, your sales team) to start a dialogue with whoever the new primary contact will be and get them familiar with your product or service.

2. Customer loss due to frustration

Although we all strive for a 100% positive customer experience there is always the possibility that a User becomes frustrated and instead of voicing that frustration to your customer service department, decides to turn to a competitor. With this program in place, you'll be able to pro-actively reach out to customers and address their concerns before they go too far down the path with a competitor.

In this example, we'll be flagging customers who have not logged into your customer portal in 90 days (although you can easily adjust the time-frame) and we'll create a Case in Salesforce so that your customer success team can follow up with them. Note that you will need to be using Salesforce Cases and you will need to have Salesforce Web-to-Case enabled in your Salesforce org.

> *At this point, you might be thinking, "why wouldn't I just trigger a notification to support@mycompany.com?" If you're sending an email to a generic support email, there will need to be a manual review and Case creation process by a person or persons designated in your organization. This creates an unnecessary review phase as a bottleneck. A slightly better option would be to configure Salesforce email-to-case for your organization, allowing support@mycompany.com to automatically create a case in Salesforce. While this may allow you to manage a low volume of cases without any hiccups, it is not recommended for larger organizations. Only the description field is populated with the body of the email, and so your reps will need to manually fill in the remaining information.*

The reason that we propose the following configuration is because it allows for better Case-flow for two reasons:

1. Avoids Bottlenecks
By just throwing these cases into the general support case bucket (which is what would happen with Salesforce email-to-case) you're relying on your support team to go through and manually update the Case Reason, the Case Type, the record type (if necessary) - in summary, you're creating unnecessary manual work for your support team.

2. Allows for Proper Segmentation & Routing
Similarly, the URL parameters are automatically defining a specific record type and/or a specific case reason so you can more efficiently route and/or set priority for these types of cases over other urgent customer requests. With all of that out of the way, let's get into building the program.

Step 1: Create the Customer Check-In Webhook

This Webhook template expands upon the simple Salesforce-Marketo mapping that we covered in the previous example but has a few differences. The Webhook template utilizes Case field parameters; for example, this template is built to set the Case Subject field value to "Customer Check-In" and the case description instructs our customer success representative to reach out to the lead or contact. You also have the option of setting the Case to a specific record type (eg. a Customer Check-In record type). Note that the 15-digit code for orgid and record type will be unique to your org. Check with your Salesforce admin if you do not have these codes.

Webhook Name:	Customer Check-In
Description:	Prompts the customer success team to check in with customers who have not logged in within a certain number of days (defined in workflow)
URL:	https://www.salesforce.com/servlet/servlet.WebToCase?encoding=UTF-8
Request Type:	POST
Template:	first_name={{Lead.First Name}}&last_name={{Lead.Last Name}}&email={{Lead.Email Address}}&company={{Company.Company Name}}&phone={{lead.PhoneNumber}}&URL={{company.Website}}&street={{lead.Address}}&city={{lead.City}}&state={{lead.State}}&zip={{lead.PostalCode}}&country={{lead.Country}}&salutation={{lead.Salutation}}&title={{lead.JobTitle}}&mobile={{lead.Mobile Phone Number}}&fax={{lead.Fax Number}}&orgid= xxxxxxxxxxxxxxx&subject="Customer Check-In"&description="This customer has not logged in for +90 days. They might need some help! "&recordType=xxxxxxxxxxxxxxx&Reason=Customer Check-In
Request Token Encoding	Form/URL
Response Type	None

## Step 2: Create a Program and Smart Campaign

We'll first want to create an Operational Program to organize this type of customer outreach. Then we'll want to create a Smart Campaign in Marketo to automatically create this Case based on a customer or prospect's browsing activity. **Under Inactivity Filters > Salesforce** section under the **Filters** drop-down select **Not Visited Web Page** as your filter. Set the web page to your login portal URL and set the activity criteria to whatever you see fit. For this example, we've chosen 90 days of inactivity.
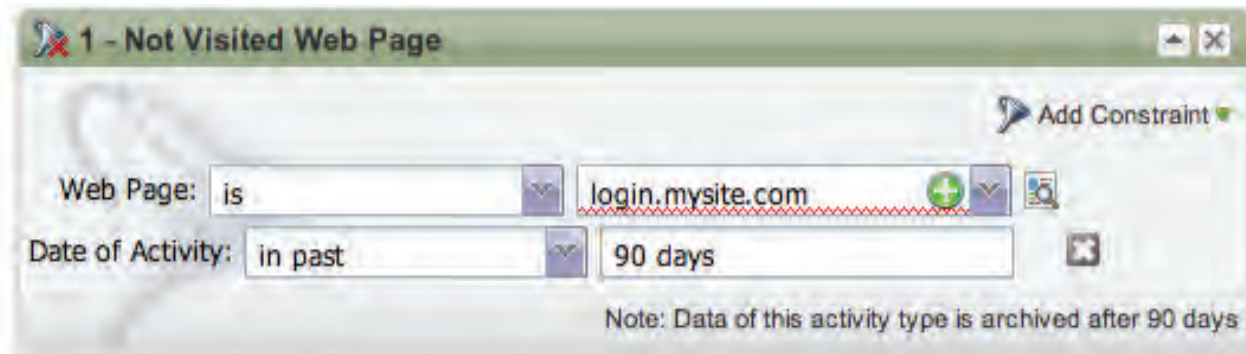

We'll want to send messages to the people who would normally be using our applications (and not the various decision makers or billing contacts) so we'll build a second block of smart list criteria so that cases are only created when the Contact Type is set to **Primary User**. We've also decided that we only want to allocate customer success reps' time to paying customers, so we've added a third block of smart-list criteria based on SFDC Type
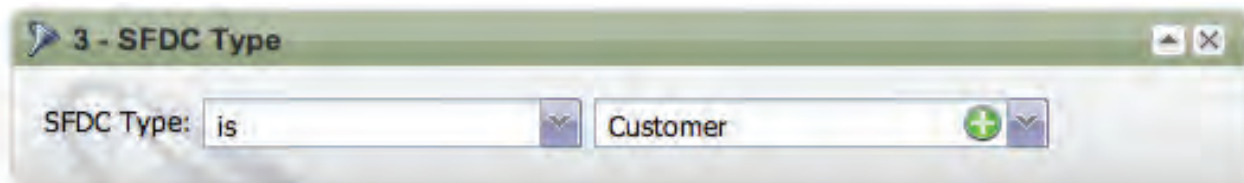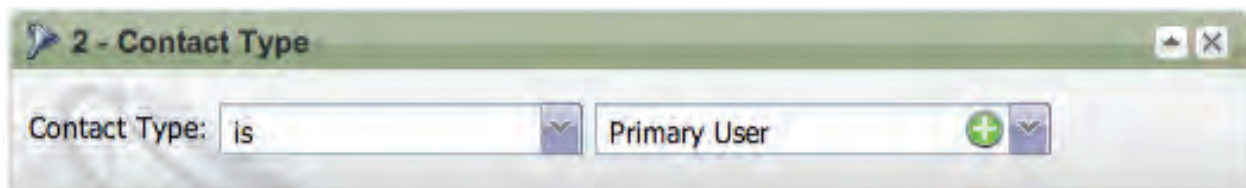
For the Flow, we'll want to create an interesting moment so that if a sales rep happens to look at the record in Sales Insight they'll see this information. Then we'll simply call the Webhook in the Flow.
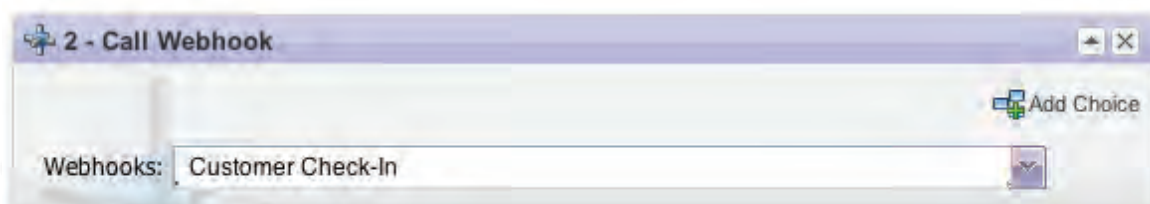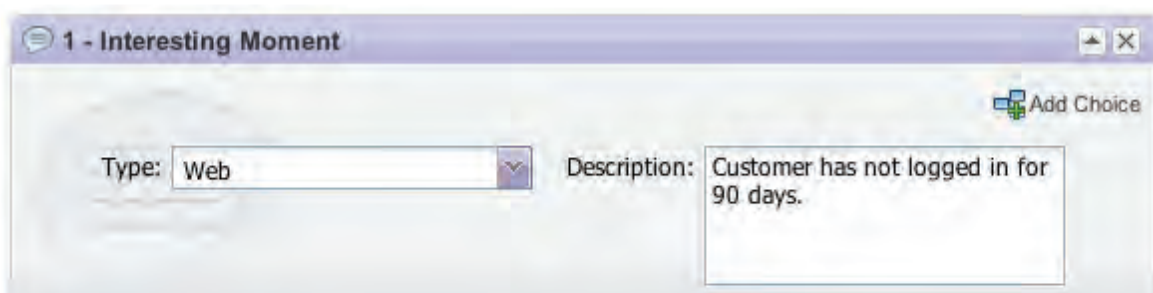
The last piece that we'll need to edit is the schedule. We recommend scheduling the Smart Campaign to be run daily, at a time that won't bog your system down.
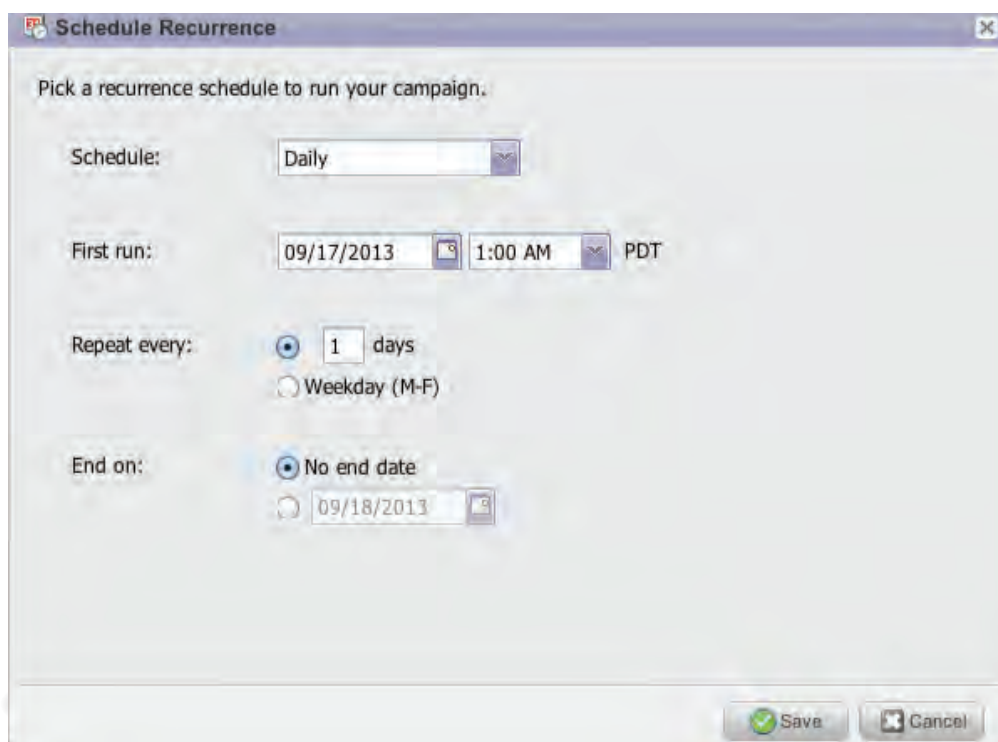
Modifying this Example

In this example, we're only going to create a case for customers but we could easily clone this and set different criteria. For example, if we wanted to clone this program for prospects who are in a free trial, we might want to shorten that 90 days down to 2-3 days before someone (either sales or support) is notified that they have not yet logged in.

#2: PREVENT DUPLICATES IN MARKETO & SALESFORCE

One of the toughest problems for marketers to solve is coming up with automated and efficient ways to deal with duplicate records coming into marketing automation and/or CRM. There's always the option of hiring an intern or entry-level marketing person to watch the Leads come into the system, check for duplicates and merge records when necessary. But a process like this is inefficient and subject to human error, so why even waste your time considering it?

### Marketo Offers Very Basic Duplicate Prevention

Marketo prevents duplicates based on exact-match email, which is not sufficient when dealing with businesses that may have multiple points of contact (eg. a champion, decision maker and finance contact may all enter the system as separate Leads) who all use varied email addresses (eg. **bob@ringlead.com** and **robert.wiley@ringlead.com**).

RingLead has worked closely with the team at Marketo to allow our advanced duplicate prevention applications to integrate seamlessly with Marketo to **prevent duplicates in both Salesforce AND Marketo!**

Before we jump into the solution, let's review how the problem manifests itself in your CRM and Marketo.

How are duplicates created in Salesforce and Marketo?

Relying on Marketo's standard deduplication functionality, which matches duplicates based on exact-match email address, has the potential to allow many duplicate Leads/Contacts into both systems. Today's marketing landscape includes multiple data entry points which are tied to various prospect touch-points, including white-paper downloads, free trial sign-up pages, contest entry forms and more.
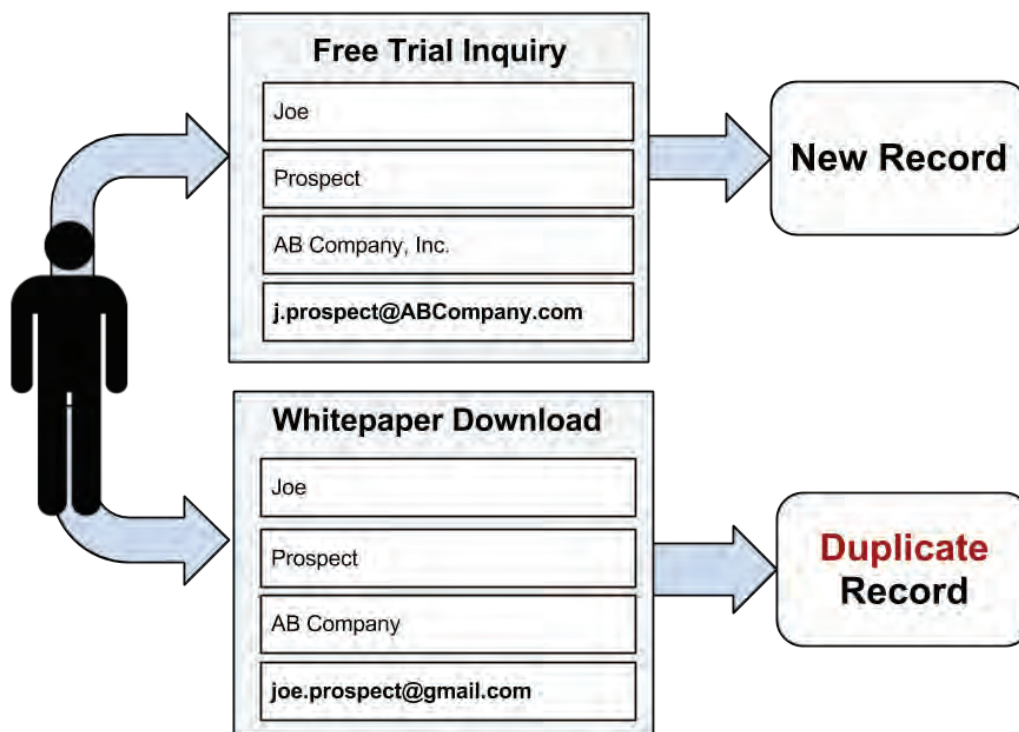
What Problems Do Duplicates Cause in Marketo?

Inaccurate Lead Scoring

In the example above, the Lead Scoring points that are associated with a whitepaper download would be associated with a new lead, joe.prospect2@gmail.com. Those Lead Scoring points should have been associated with the original record in the system, joe@ABCompany.com. This will equate to hot leads being left behind in Marketo and not being distributed to your sales reps for follow up.

Decreased Open Rates

Using the same scenario as before, you will be sending emails (via drip nurturing campaigns, one-time email blasts, etc.) to both of these records, joe@ABCompany.com and joe.prospect2@gmail.com. It's likely that an email open will register with only one of these records since Joe Prospect will probably only open one of the emails and delete the others.

Increased Cost of Marketo

A key component of your Marketo license is based on the size of your database; in other words, duplicates are piling up in your Marketo database and costing you money!

How does RingLead's Webhook Integration work?

The criteria used to find a matching Contact, Lead or Account is part of a complex heuristic pattern matching process. First RingLead attempts to find an exact email match or unique ID (Salesforce ID or custom field). If no match is found, RingLead builds a confidence level based upon many fields including, but not limited to first name, last name, company name, address, phone, email domain, and website. Once the confidence level reaches the point where there is no doubt it is a match, RingLead considers the record a match. This ensures that there is no mismatch. If RingLead cannot verify that any Contact, Lead or Account is a match, RingLead will create a new Lead. Changes can be made to the matching criteria.

Step 1: Create the RingLead Webhook

> Note: To leverage this integration you will need access to RingLead Unique Web-to-Lead. If you do not already have a subscription to Ringlead, sign up for a free trial at www.RingLead.com/Free-Trial

Webhook Name:	RingLead Web-to-Lead
Description:	Prevent duplicates in Marketo and Salesforce.
URL:	https://salesforce.ringlead.com/cgi-bin/XXXX/X/dedup.pl The 4-digit number in blue would be your RingLead customer number. The single-digit number in red would be your form action URL number.
Request Type:	POST
Template:	first_name={{Lead.First Name}}&last_name={{Lead.LastName}}&email={{Lead.Email Address}}&company={{Company.CompanyName}}&phone={{lead.Phone Number}}&URL={{company.Website}}&street={{lead.Address}}&city={{lead.City}}&state={{lead.State}}&zip={{lead.PostalCode}}&country={{lead.Country}}&salutation={{lead.Salutation}}&title={{lead.JobTitle}}&mobile={{lead.Mobile Phone Number}}&fax={{lead.FaxNumber}}&industry={{company.Industry}}&oid=00D300000007gWc&RL_marketo=merge&RL_marketoID={{lead.id}}&RL_new_lead=disable&retURL=SFDCID_returnError
Request Token Encoding	Form/URL
Response Type	XML

Save the Webhook and you should see the Webhook overview screen now.

Step 2: Create a New Custom Field

We'll need to create a custom field for Webhook response mapping. To do this, first open up the **Admin** panel in Marketo and navigate to the Field Management section. Then look for the **New Custom Field** button.
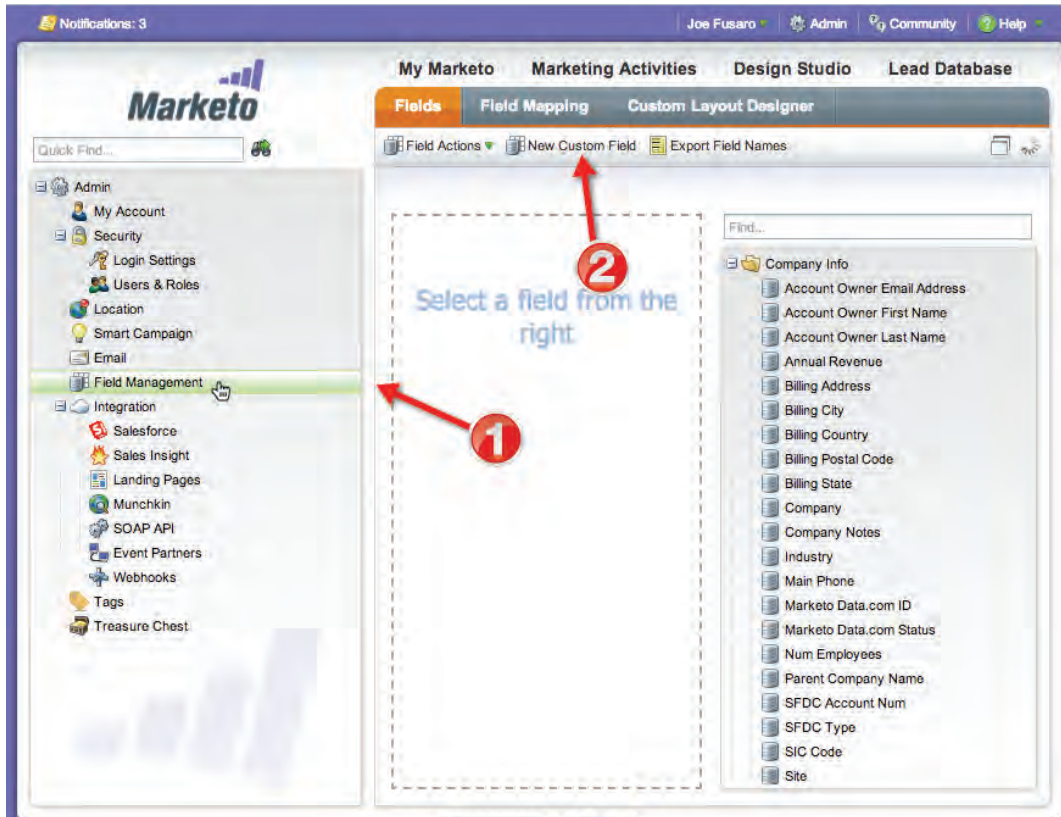
For this new field, the Type should be set to **String**, the Name should be set to **RingLead Status** and the API Name should be **RingLead_Status**

Step 3: Configure Response Mappings

Below the Details section look for the Response Mappings section and click Edit.

The values for Response Attribute and Marketo Field are as follows:

Response Attribute	ringlead-response.salesforce-new-record
Marketo Field	RingLead_Status

Note that the new Marketo Field that you've created, RingLead_Status, may not be visible at first. You may need to log out and then log back into Marketo for the Response Mapping to save correctly.

Step 4: Create a RingLead Program

Now that you have successfully created the RingLead Web-to-Lead Webhook, you need to insert it into a Marketo program so that it can process incoming Leads. We recommend creating a global program that processes all incoming Leads but each business process is unique so please modify the program to your needs. In the **Data Management** folder, **create a new folder** called **RingLead Processing**. Within this new folder, create a **new Smart Campaign** called RingLead Web-to-Lead.
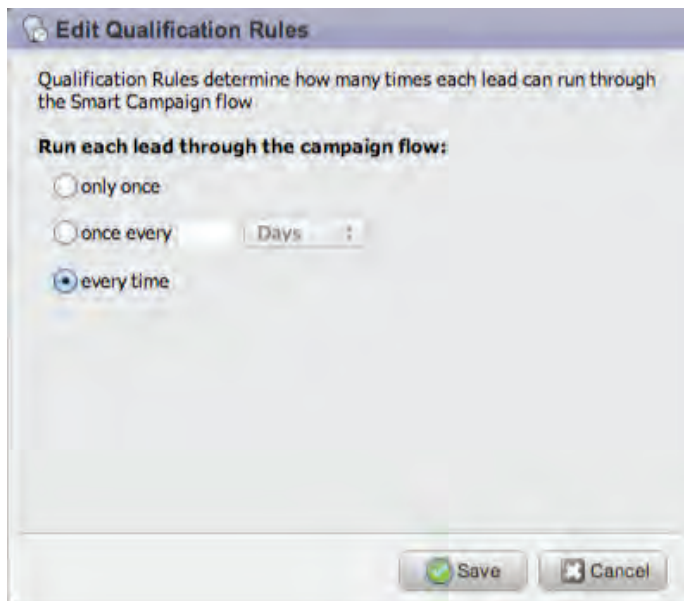
The Smart List criteria should be triggered when a **Lead is Created.**

The only Flow step in the process will be to call the RingLead Web-to-Lead Webhook.
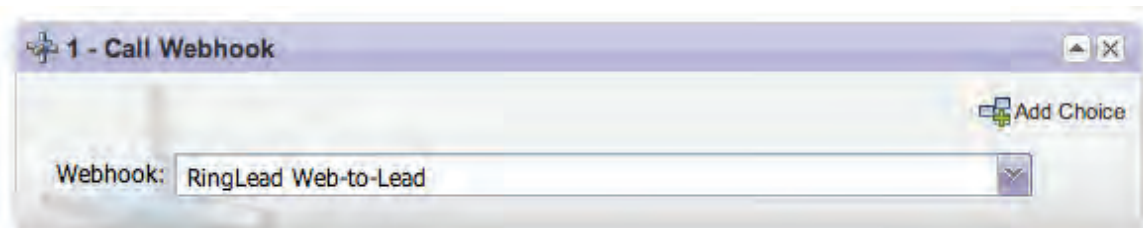
For the schedule (a.k.a. qualification rules) you'll want to set it so the Webhook is called every time a lead runs through the Smart Campaign flow.

#3: TEXT A PROSPECT TO REMIND THEM OF AN UPCOMING DEMO

Most of your sales teams' day is probably structured around virtual meetings and/or screen-share demonstrations through services like GoToMeeting. Chances are that your sales reps have encountered quite a few "no-shows" on these demos, which is understandable as we've all had days where we've forgotten to look at our calendar and the day just gets away from us.

But what if you could remind your prospects of an upcoming demo with a reminder call and/or a text message? With Salesforce **time-based workflows, Marketo Webhooks** and a **Twilio** account, you can! In this example, we'll set up a Marketo program that sends a text message to a prospect 60 minutes prior to a demo

Step 1: Set up your Twilio Account
Setting up a Twilio account is easy - just go to Twilio.com to get started. You'll need your Account ID and Auth Token in the next few steps.

Step 2: Create a Time-based Workflow in Salesforce
We'll need to create a simple time-based workflow in Salesforce in order to trigger the Smart Campaign in Marketo. In Salesforce, go to **Your Name > Setup.** On the left sidebar, navigate to **App Setup > Create > Workflows & Approvals > Workflow Rules** and click **New Rule** to get started.

In Step 1 of this process, we'll select the **Event** object.
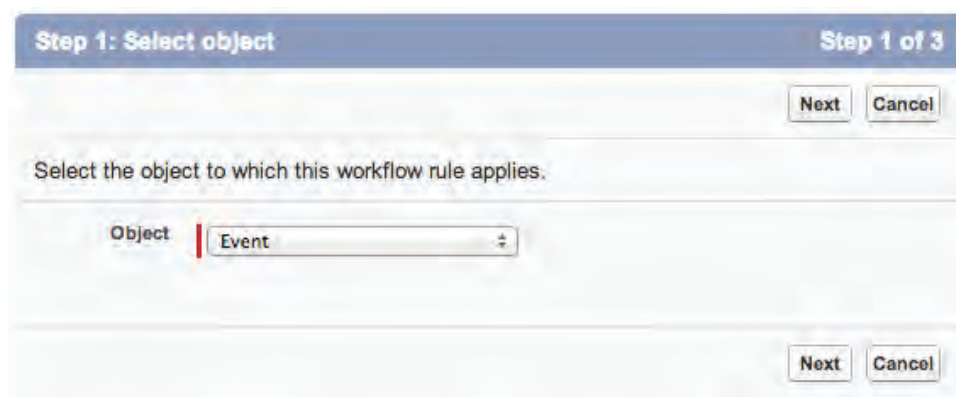
In Step enter the following information:

Rule Name	SMS Trigger
Evaluation Criteria	created, and any time it's edited to subsequently meet criteria
Rule Criteria	Type equals Demo

In the final step of the workflow construction process, under the **Time-Dependent Workflow Actions** section, click **Add Time Trigger**. You should now be viewing a section titled Workflow Time Trigger Edit, which you'll want to set to **1 Hours Before Start**.
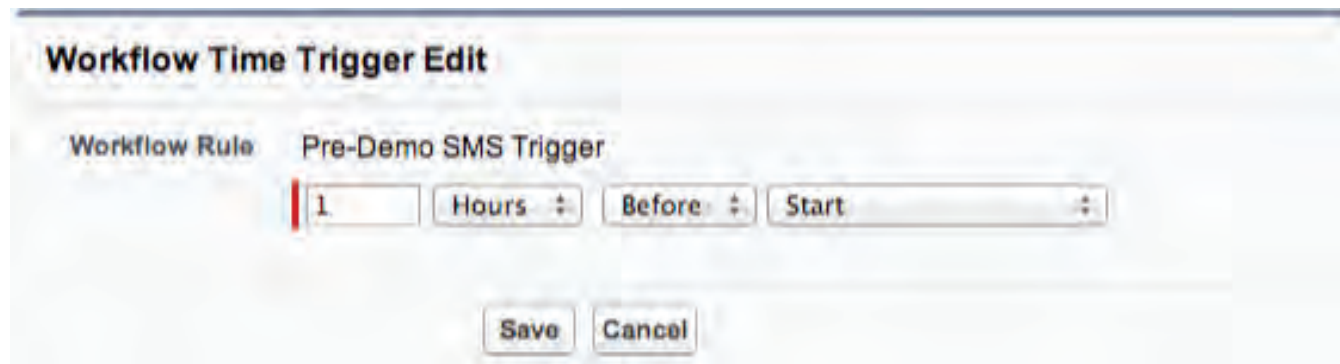
Now click Add Workflow Action and select New Task. Enter the following information accordingly:

Assigned to	Assigned Owner
Subject	SMS Trigger
Unique Name	SMS_Trigger
Due Date	Rule Trigger Date
Status	Completed

The **Priority** can remain with the default value, **Normal,** and optionally you can add a description to let your users know what this Task means.

Now that we've got a time-based workflow built to trigger activity in Marketo, we can start building the Webhook and associated Smart Campaign.

Step 3: Create the Twilio SMS Webhook

| Webhook Name:	SMS (Text) Demo Reminder
Description:	Reminds customer of an upcoming demo via SMS/Text message.
URL:	https://{TwilioAccountID}:{TwilioAuthToken}@api.twilio.com/2010-04-01/Accounts/{TwilioAccountID}/SMS/Messages
Request Type:	POST
Template:	From=%2B15555555555&To=%2B1{{lead.Mobile Phone Number}}&Body=Hi{{lead.First Name}}, this is just a reminder that your RingLead demo will begin in about one hour.
Request Token Encoding	Form/URL
Response Type	XML

Important to note three things:

1. After the leading https:// in the URL, you need to enter your unique Twilio Account ID, followed by a colon, followed by your Twilio Auth Token. You'll find these on your Twilio Dashboard.

2. The Body of your text message is restricted to 160 characters or less. Since we're dealing with the lead. First Name token, it's best to give yourself some slack for those Prospects with longer names.

3. In the payload template, you'll notice that we've left the number 1 before the lead. Mobile Phone Number token. This is because, by default, Salesforce strips out a leading 1 when you enter a 10 digit number. Unless you begin the phone number value with a plus sign and a country code, this leading number 1 will be removed every time. To compensate for this, we've left a 1 directly before the Marketo token.

International users may wish to remove this value and replace this with a different country code -or- require that users save every phone number with a plus sign as well as the correct country code.

## Step 4: Create the Demo Reminder Program in Marketo

Create a new Program in Marketo and within that program, create a new Smart Campaign. In the Smart List section, use the **Activity is Logged** trigger, where the Subject is **SMS Trigger** (or whatever you set the Task subject line to in the Salesforce time-based workflow that we created earlier).
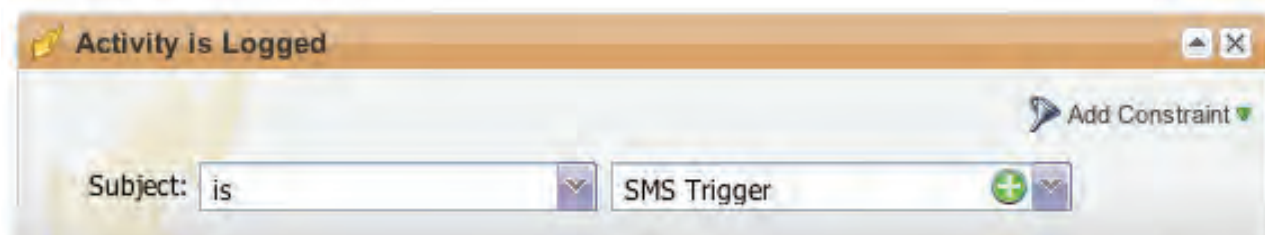

We'll also want to respect Twilio's API and Marketo's bandwidth by running this process only if the Mobile number is populated. This is achieved by adding a simple filter.

Now we'll simply add a call to the Webhook in the flow steps and memorialize the activity with an interesting moment.
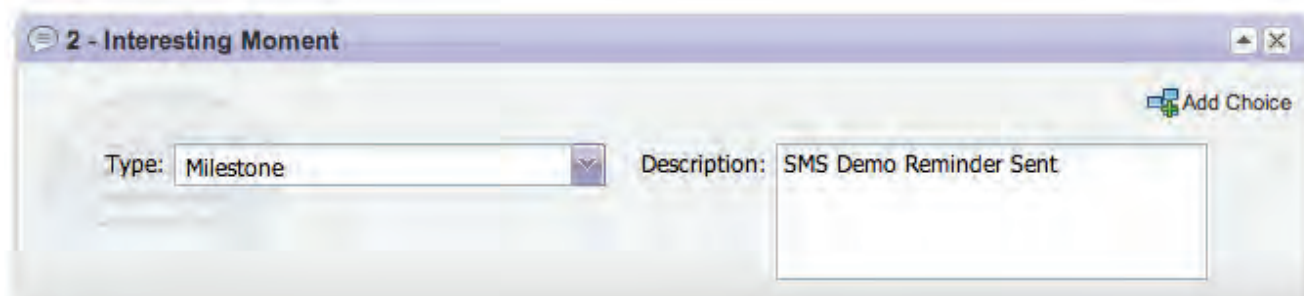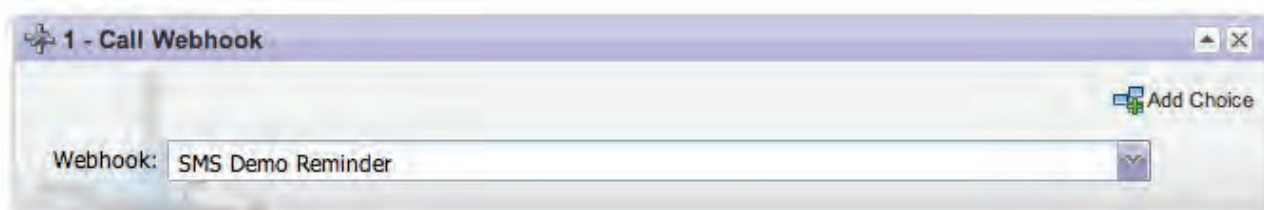
The end result of integrating all three of these systems is a simple text message that addresses your prospect by name and reminds them that they have committed to a demo within the next 60 minutes.
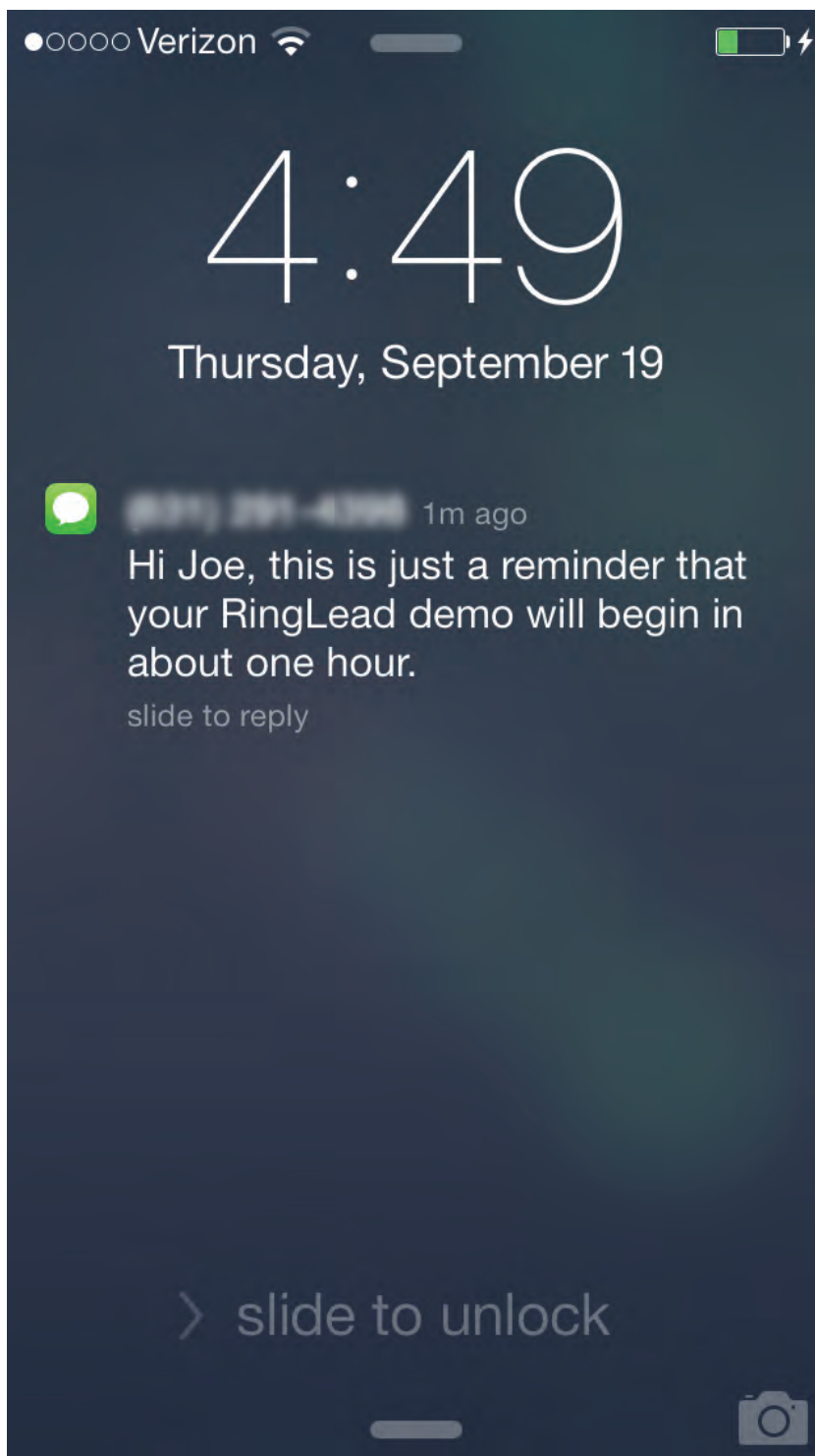
C O N C L U S I O N

There are definitely plenty of other cool things we could have worked into this guide, but there are seemingly endless ways that you can leverage Webhooks for your organization, and so compiling all of the unique use cases that Webhooks allows for would be near impossible. We hope that this guide was helpful and that you can start using one or all of these examples to make your organization more productive.

Do you have a cool example that you'd like to contribute to a future version of this guide? Email mktg@ringlead.com.

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