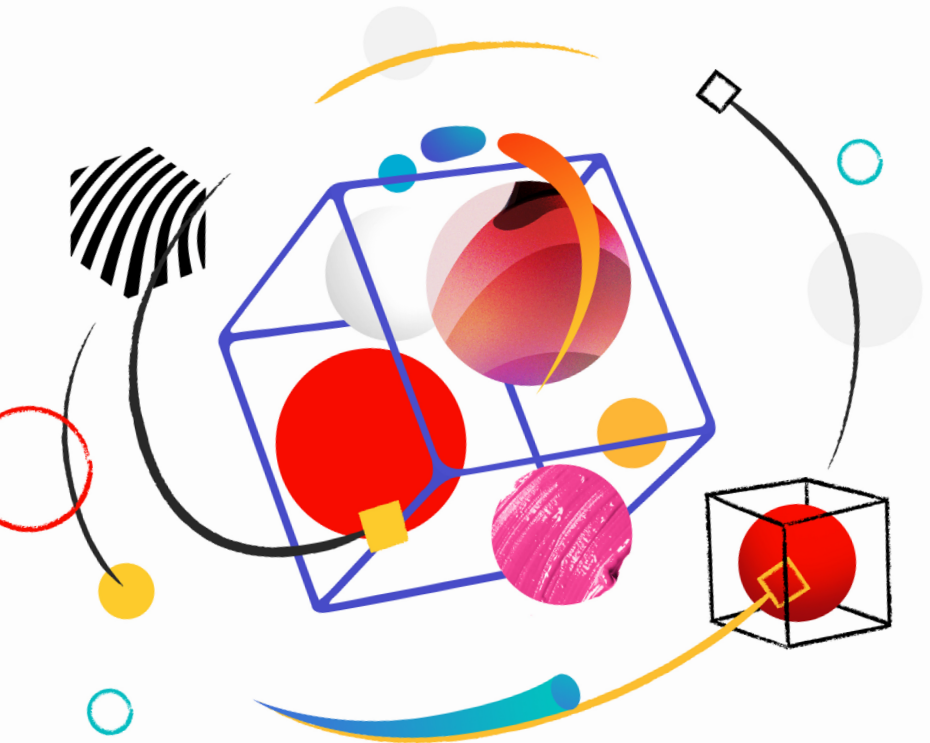




Make your move to Adobe Marketo Engage

A guide to accelerating ROI with
a seamless migration



It's time for measurable results.

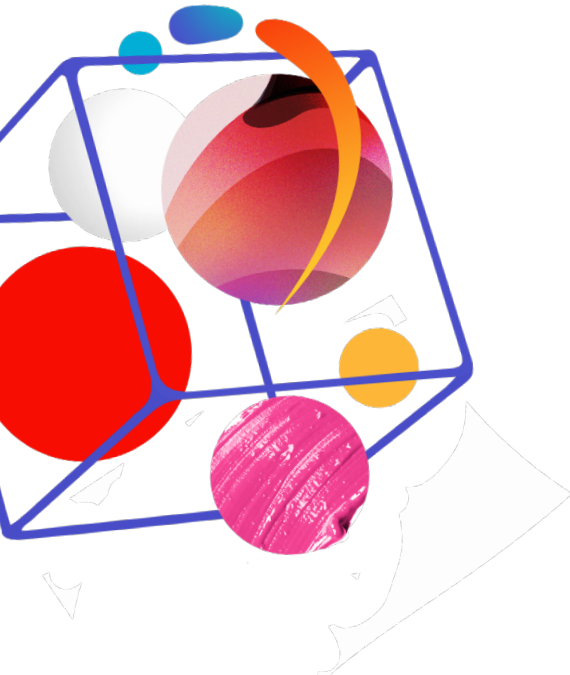
If you're reading this, it's probably because you've run into some challenges with your current marketing automation solution. Maybe outdated or complex functionality make workflows more complicated than necessary. Maybe your marketing team has to rely on technical users to get campaigns—or even a simple email—out the door. Rather than leading the pack, you may feel you lack quality support from your marketing technology partner.

As the pace of innovation continues to drive new solutions into the market, it can be hard to tell a lasting, long-term solution from those that simply carry you to the next wave of changes. But there's no time to lose when it comes to keeping your marketing team competitive. That's why it's time to invest in a solution that doesn't just enable your team to complete tasks but empowers them to drive impressive results. It's time to look to Adobe Marketo Engage.



In this guide, you will learn how Marketo Engage can help your business in diverse ways:

- Get proof of Marketo Engage's **value and impact** on marketing efforts.
- Learn how much **time your team will gain back** working with Marketo Engage.
- Find the **questions you should ask** and steps you should take to migrate.
- Explore the details of our **three-step migration plan** and timeline.
- See how you can **make your move** to Marketo Engage.
- Learn how **industry peers** handled their migration.




Proven value with powerful results.

Explore the capabilities Marketo Engage provides

As an industry-leading marketing automation platform (MAP), Marketo Engage offers a powerful combination of scale, speed, and ease of use to organizations of all sizes. Marketo Engage is the solution of choice at thousands of companies around the world who use our solution to create complex customer experiences with ease and finesse.

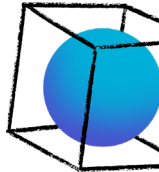
In September 2018, the *Gartner Magic Quadrant for CRM Management* named Marketo (now Marketo Engage) a Leader based on completeness of vision and the ability to execute.



“ Marketo contains all of the logic that moves leads through the funnel stages (leveraging a combination of activity and demographic-based scoring) and collects all of the necessary data to allow us to report on funnel metrics... With the robust logic capabilities, you can pretty much design your nurturing and lead management framework to function in any way you need it to. So it's a very scalable solution.”

Emily Thornton

Senior Consultant, Technology, ANNUITAS



As an innovative solution that helps companies drive customer experiences, it continues to outpace competitors. And customers rate us among the overall top solutions for marketing automation on TrustRadius.

Show stakeholders the value of migration

Offering lead management, email marketing, consumer marketing, customer base marketing, mobile marketing, and revenue attribution, Marketo Engage helps you build relationships across complex customer journeys—and demonstrate the efficacy of every marketing effort.

While your marketing team may be convinced of the value right away, your internal stakeholders may need more convincing. Use our financial comparison formulas and sample data (below) to strengthen your case for migration.

Think of longevity and stability as some of the greatest benefits Marketo Engage can bring. After all, the most comprehensive way to analyze and justify any investment is to compare costs over time. By completing a cost-benefit analysis of your current solution and the total cost of ownership for each, you'll gain a clearer picture of the long-term value we can bring to your organization.

Use our comparison formula.

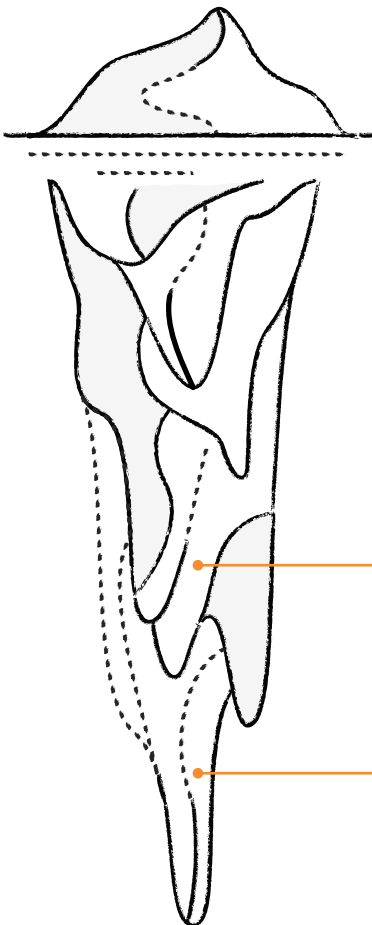
When comparing the costs and benefits of your legacy solution with Marketo Engage, take your time to weigh your options—and then use a simple formula to get an estimate on total costs:

$$\text{Purchase price} + \text{operating costs} + \text{opportunity costs} = \text{total cost}$$

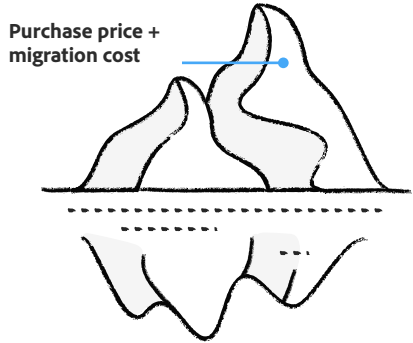
Review the real data gathered from previous Marketo Engage customer migrations (hereafter) to learn how embedded operating and opportunity costs can have a long-term impact on your budget. And how Marketo Engage can help you save.

The long-term cost savings of migrating to Marketo Engage far outweigh the indirect costs of maintaining a legacy platform.

Maintain legacy platform



Migrate to Marketo Engage



Operating cost

- Resources and people: 3x greater cost
- Training and support: 5x more time
- IT dependency: 90% more IT dependency

Opportunity cost

- Time to value: +3 months to get one campaign out the door
- User adoption: 6x less user adoption
- Revenue team productivity: 20x decline in lead velocity



Here's what Marketo Engage offers.

Share the following list of benefits with your team—and then use these points to structure your conversations with, and get buy-in from, your internal decision makers.

Grow your business with us

Now, more than ever, companies are realizing that marketing drives revenue. With the right marketing automation solution, access to open APIs, and freedom to integrate with over 600 best-in-class partner apps, you'll have the freedom to choose the right ecosystem to most effectively engage every customer and empower your team.

Increase your time to value

Marketo Engage offers ease of use, power, and sophistication—it's designed to help you ramp up quickly and drive immediate value. Built with time-saving functionality, Marketo Engage lets you pump up productivity and eases reliance on technical support. Rich features—like cloning and tokens, drag-and-drop filters, and editable templates—make it easy to create, modify, and replicate even the most complex multichannel campaigns. And a unified experience across all functions allows your team to work in one place versus having to jump around different areas of the application. Finally, its robust efficiencies extend well beyond marketing solutions. Real-time, deep integration with other key business systems, like your CRM solution, provides timely, prioritized, and actionable insights for your sales or acquisition team that help to align your teams and drive success.

Gain mastery over complex customer experiences

Customers shop everywhere—and on every possible device. So these days, no customer experience is linear. Marketing campaigns have to be built with this in mind. With lead nurturing and account-based marketing, non-technical users can

quickly create sophisticated, targeted campaigns with ease. More importantly, instead of being restricted to linear, predefined campaigns that fail to adapt to changing customer expectations across channels, you'll be able to adapt your strategies in real time to meet customers where they want to be.

Welcome artificial intelligence to the table

Personalized experiences drive engagement. In fact, it's increasingly the only way successful companies break through the noise—just think of how Amazon and Netflix tailor every user's experience. For marketers, that means driving meaningful personalization with thousands—or even millions—of prospective buyers across all channels. But hand-tuning campaigns to that extent simply isn't possible. That's why we offer adaptive campaigns—that is, personalized ad campaigns driven by the marketer and AI working together—that help marketers rise to meet evolving challenges. While most legacy solutions offer no concrete artificial intelligence (AI) investment strategy or vision, Marketo Engage customers can use AI to personalize and match content across email and web.

Personalize across every channel

To create engaging customer experiences, you need to be everywhere customers are—with personalized content that meets their needs and expectations. Marketo Engage gives you the power to personalize content for all kinds of experiences, on all the channels your interested customers may be. As buyer journeys become more complex, Marketo Engage helps companies simplify the way they plan, orchestrate, and measure engagement and experiences at every stage using lead and account-based marketing.

Align your marketing and sales teams

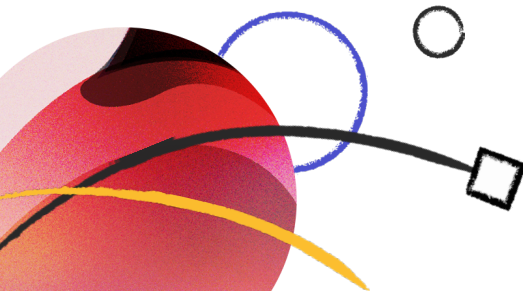
Complexity in the buyer journey can only be overcome by teams that work together. When you align your marketing and sales teams with Marketo Engage, you gain visibility into the big picture of customer experience. And this oversight—powered by data-driven insights—allows you to take smarter actions and build sharper strategies to drive engagement.

Drive ROI with closed-loop reporting

Migrating to a new marketing automation solution provides you with a terrific opportunity to assess what is working, what is underperforming, and where you can improve—whether it's optimizing spend or increasing ROI on marketing. Just like when you move into a new house, moving to a new solution gives you the chance to assess what is valuable, purge what you don't need, and design your future. The combined product strength of Marketo Engage and Bizible provides marketers with enhanced visibility into full-funnel analytics, from campaign planning to execution and revenue, giving greater insight and power over where you place your budget.

Join our growing community

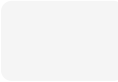
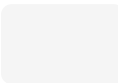
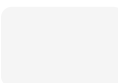
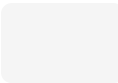
Marketo Engage provides a dedicated, in-house technical account manager as a partner focused on your success. No more waiting line for support and answers. The Marketing Nation, our community of more than 60,000 like-minded marketers and digital marketing thought leaders, is a great place to get new ideas and share best practices. With us, you've got an ecosystem of LaunchPoint partners that offer hundreds of applications to help you extend the capabilities of your system and the value of your solution so that you're poised for future growth. Even better, you don't have to go it alone or lose any momentum as you make the switch. We provide all the tools and guidance you need to realize better marketing results.

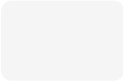
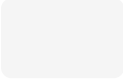
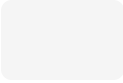
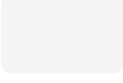


More marketing return, less time getting there.

Use this worksheet to estimate the time your team currently spends on these tasks with your legacy solution. Then, compare it with the time it takes us to complete that same task using Marketo Engage.

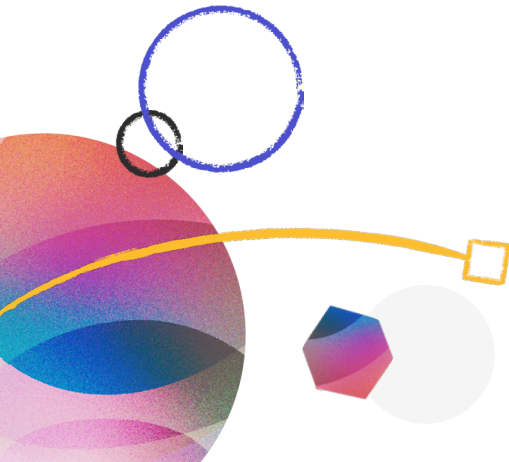
Activity	Marketo Engage capabilities	Our time	Your time
<p>Build a landing page with a five-field form. <i>Example: A registration page for an upcoming webinar.</i></p>	<p>Fully responsive landing page drag-and-drop design with WYSIWYG editing simplifies the work required to create effective pages that look great on all devices. Bonus: No help needed from tech support.</p>	5 min.	<input type="text"/>
<p>Create an invite email and a reminder email. <i>Example: Emails deployed from the registration page you created in the first activity.</i></p>	<p>Drag-and-drop modular layouts make it easy to navigate projects and quick to customize all areas in our templates (including color, style, imagery, dynamic content, and more).</p>	3 min.	<input type="text"/>

Activity	Marketo Engage capabilities	Our time	Your time
<p>Segment your invite email based on three criteria.</p> <p><i>Example: Executive role, lives in Virginia, downloaded your ROI guide last week.</i></p>	<p>Drag-and-drop filters and smart lists simplify segment definitions, using factors like role, geography, and behavior.</p> <p>Bonus: Avoid the extra clicks, multiple windows, and many steps that come with creating each new segment in every campaign.</p>	30 sec.	
<p>Select different emails for multiple groups.</p> <p><i>Example: Three different emails for varying registrants, based on their job title.</i></p>	<p>Drag-and-drop constraints without yes/no decisions for each piece, wait step, and more—making this core task easier than ever to complete.</p>	1 min.	
<p>Pull together the above assets into a full campaign.</p>	<p>Campaign flow setup provides a clear perspective on assets, making it possible to master complexity without losing the ability to scale as a campaign grows over time. Bonus: Flexibility makes it easy to deliver non-linear engagements by listening and responding to new customer behaviors.</p>	10–15 min.	
<p>Replicate the campaign for three other uses.</p> <p><i>Example: Clone the same program for three separate webinars.</i></p>	<p>Unique program-level cloning simplifies replication. Re-create campaigns with complexity (including tags, tokens, and content) while using tokens to customize individual assets.</p>	8–10 min.	

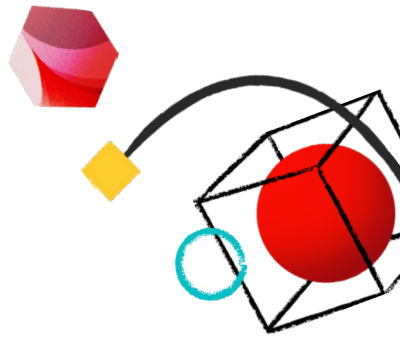
Activity	Marketo Engage capabilities	Our time	Your time
<p>Create a trigger to notify sales of leads who fill out the registration form.</p>	<p>Give the sales team visibility into the actions that leads take.</p> <p>Define activities and set triggers to notify your entire sales team in just two steps.</p>	1 min.	
<p>Add a third email to the middle of your stream.</p>	<p>Ensure that everyone in a stream gets the most recent content and then goes back to where they were. No need to replan the process, disconnect existing campaigns, or worry about sending duplicate content to customers.</p>	5 sec.	
<p>Create a lead score rule. <i>Example: +5 points for all leads who register for the webinar.</i></p>	<p>Drag-and-drop fields build scoring rules based on behavior, demographics, and firmographic data. Multiple scoring models use cloning for global organizations, multiple business units, or product lines.</p>	5 sec.	
<p>Determine the total revenue contributed by webinar programs last year. <i>Example: Choose a similar program, such as trade shows or digital advertising, to examine.</i></p>	<p>Program analyzer crunches numbers and provides quick insights into pipeline revenue, as well as ROI first-touch and multi-touch attribution.</p>	3 min.	

How much time did you save?

What could your team do with all that extra time?



Pursue a guided path to migration.



Steps to get started

You'd never move into a new house without a game plan, a budget, and a clear idea of where you were headed. So treat this migration the same way. Use these tried-and-true steps for a foolproof marketing automation solution migration.

1. Treat it like a project

With so much riding on a successful migration, it's unwise to approach it as an off-the-cuff exercise. Instead, assign a project manager and identify stakeholders across your IT, marketing, and sales teams. Your project manager can help coordinate each step and keep everyone on track.

2. Outline your future goals

Migrations are all about building a brighter tomorrow—so take time to document your vision and identify what you hope to gain from migration. To that end, meet with your team and stakeholders to consider everyone's perspective on how to evolve marketing capabilities. Note your priorities versus what you consider “nice-to-haves.” That way, you can identify immediate needs and plan for long-term success.

3. Plan your migration

Map out a workable plan and timeline for migrating the essentials so you can carry on day-to-day activities without interruption. Then, think about what to add and when to fuel new programs and campaigns. As you take this step, consider how to take advantage of Marketo Engage best practice program templates.

4. Review your martech stack

For many organizations, marketing automation is the heart of their marketing technology stack. That's why it's essential to take an inventory of your systems—such as webinar solutions, web analytics, customer relationship management (CRM), and content management systems (CMS)—that currently integrate with your automation solution (or that you'd like to integrate in the future). With an accurate map of your current tech stack, you can develop an integration project plan. For businesses with a CRM system, remember to audit the objects and fields in your current marketing tool and CRM system and plan your data migration strategy for both CRM and non-CRM data. This will help you plan your data flows, understand your API call requirements, and avoid surprises when you make the switch.

5. Clean up your assets

Figure out which elements of your existing solution and tools you need to see reflected in Marketo Engage and which you can and should leave behind. Inventory and prioritize the migration of your assets (such as forms, landing pages, and emails), campaigns, processes (including demand generation, nurturing, and customer lifecycle), and data (such as audience segment lists and lead scoring). Now's the time to streamline and clean them.

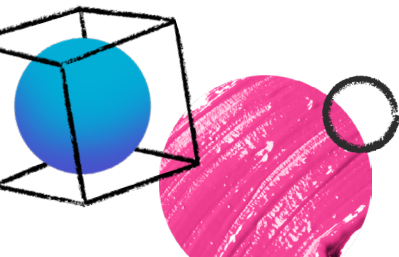
6. Use migration guides and services

Marketo Engage offers a guided migration service that provides basic advice and direction to help your team work through migration activities. For those who want additional help, we offer extensive professional services that include roadmap development and hands-on migration activities.

The questions you need to ask.

Proactive planning can ensure a smoother migration. Discuss the following questions with your migration guide to start planning yours:

- Do you have a services organization, or do you outsource client implementation?
- Based on our use case, do you think a third-party partner would be better for our implementation? If so, do you have recommendations?
- Can we use some of our own resources to assist with migration activities to control costs?
- Are there resources available to help us plan our migration, provide hands-on help, or both?
- How many customers have you moved from [current vendor's name] solution to Marketo Engage?
- Can you provide us with customer references we can reach out to?
- Does your implementation package/service include migration consulting?
- How flexible is your migration service's scope?
- How will you support our particular use case?
- How do we manage migration across divisions or product lines (including workspaces and partitions)?
- How will we plan to keep the engine running through the migration process?



Follow three steps for easy migration:

Step 1: Content

Create landing pages and validate built landing pages in Marketo Engage.

Build forms for web integration (iframe, embedded form, API).

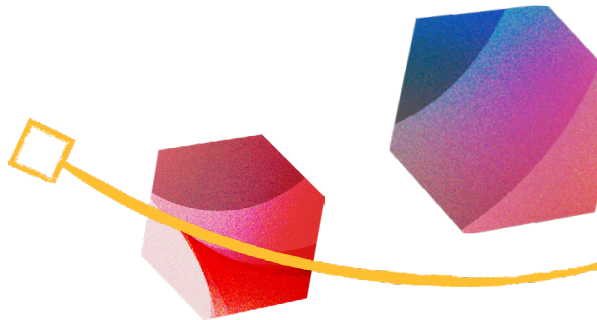
Test forms to confirm data for all fields are inserted into Marketo Engage.

Import images into Marketo Engage.

Import PDFs into Marketo Engage.

Import HTML code of emails into new emails within Marketo Engage.

Test emails (send samples) to check links and display.



Step 2: Data

Import unsubscribe list (CSV).

Import data (marketing ONLY data).

Create suppression lists.

Build the following:

- Core and target segments
- Relevant product lists
- Relevant regional lists
- Relevant business unit lists
- Logic to add new leads to your lists

Step 3: Programs

Define lead partitions and workspaces.

Discuss channels and tags.

Define interesting moments.

Discuss PPC/digital marketing plan.

Review scoring program.

Integrate CRM.

Review flows and associated content to be migrated.

It's time to make a move.

Following these best practices will ensure that you hit the ground running during your migration.

Work with coaches for guidance

We modulate our coaching and build customized sessions to give you tailored support as part of our onboarding services during implementation. Though you may not need to start from scratch, questions will come up as you learn about new features and capabilities. Use your time with our consultants for coaching and hands-on guidance.

Start building expertise

If you're migrating from another marketing automation solution to Marketo Engage, you may be a more advanced user—but you'll still need to learn the ins and outs of your new solution and get hands-on experience using it. Take advantage of our training system to get an overview of the basics. Even if you're an experienced user, it will introduce you to the terminology for features and concepts unique to our solution. Then, you should explore Marketo University for on-demand training courses. Check out the resources section of our website for access to definitive guides, eBooks, recorded webinars, and other educational assets that can spark ideas about ways to use your new solution.

Rack up quick wins

To gain momentum and support, consider starting with simpler campaigns—like one-off emails—and work your way up to more sophisticated programs. This will help you get up to speed with our solution and its features. By the time you're ready for more elaborate campaigns, you should have a good feel for how Marketo Engage works and have ideas for streamlining or otherwise improving complex campaigns.

Plan to review

At the 9-to-12-month mark, you may want to ask us to review your instance and campaigns for guidance on how to get the most from all your migrated programs. This is also a good time to check in on best practices and get recommendations for continuous optimization.

See how it's (been) done.

It's one thing to read about the best approach to a migration. It's a whole other thing to learn how it's done from others—in their own words.

VersionOne's seamless transition to Marketo

VersionOne's solution helps small, midsize, and large companies accelerate software delivery and increase business agility. When the Director of Marketing Operations, Kristen Wendel, made dramatic changes to VersionOne's digital marketing strategy for enhanced agility and scalability of marketing campaigns, she included replacing their legacy marketing automation tool at the top of her list.

VersionOne worked with us to implement a solution that would enable broader transformation toward operational excellence and enterprise-focused marketing programs. Wendel's major concern was how the migration would impact current processes, especially those involving VersionOne's free software trials, a key source of leads. Marketo (now Marketo Engage) suggested an approach that supported legacy processes while building and testing the infrastructure and updated processes underneath. This approach not only smoothed the transition, but also enabled VersionOne to build a new freemium trial flow.

The Marketo consultant configured a dynamic landing page with multiple forms for the trial validation process in less than an hour. This same functionality took months to develop with the previous solution. As Peter Herbert, vice president of marketing, put it, working together we “turned months into minutes.”

“ Marketo partnered with us every step of the way, enabling us to seamlessly complete our migration in just three months. Marketo consultants led the full implementation, including database synchronization, programs setup, lifecycle and lead scoring models, channel definitions, lead source appending, modelers, and Revenue Cycle Explorer reporting.”

Kristen Wendel

Director of Marketing Operations, VersionOne





The right time to start your migration is right away.

You'll be in good hands as you begin migrating from your legacy marketing automation solution to Marketo Engage. With over 4,000 deployments worldwide, our team has deep expertise with a wide variety of use cases and best practices. The organizations that have already made the switch have seen numerous benefits, including greater efficiency, ease of use, ongoing support, and revenue impact—to name just a few.

There's never a perfect time to roll out new software or start a new project. You'll always be busy. But the longer you wait to initiate a migration, the longer you'll have to wait to see your revenue move up and to the right.

Now that you know how to migrate smoothly, there's no need to wait. With our help, you can fully convey the opportunity cost of your current solution and communicate a plan for moving forward to your key stakeholders. We'll help you realize more value with a solution that meets long-term needs. The sooner you get started, the sooner you'll begin incorporating the value of Marketo Engage into all of your programs—so your marketing team can prove value and create greater results.

Adobe Experience Cloud

Adobe Experience Cloud is the most comprehensive suite of customer experience management tools on the market. With solutions for data, content, engagement, commerce, personalization, and more, Experience Cloud is built on the world's first platform designed specifically to create customer experiences. Each product is built on a foundation of artificial intelligence and works seamlessly with other Adobe products. And they integrate with your existing technology and future innovations, so you can consistently deliver the right experience every time.

Marketo Engage

Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Marketo Engage.

Sources

Emily Thornton, "Marketo: Powerful Platform If You Have a Solid Strategy!," TrustRadius, January 2018.

Ilona Hansen, "Magic Quadrant for CRM Lead Management," Gartner, September 2018.

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