

Integrating Extole with Marketo

Overview

The Extole platform easily integrates with Marketo, passing advocate and friend lead information directly into your instance. All Extole customers can view complete referral program member data directly in the Extole platform, but customers who use Marketo can also track, attribute, analyze, and remarket to all members of their referral program.

When you integrate Extole with Marketo, you can answer questions like:

- How many advocates and friends are net new to my database?
- How does my referral channel compare to my other marketing channels?
- What are my referral leads clicking on and downloading from my website?

Use Cases

ADVOCATE AND FRIEND TRACKING

You can use Marketo to track leads (email addresses) generated through all of your referral programs. Both advocate and friend leads that enter through your Extole campaigns are passed into your Marketo instance via a dedicated program. This allows you to track the status and progress of your customers throughout every stage of your Revenue Cycle, and determine which friends and/or advocates end up purchasing your product or solution.

CHANNEL REPORTING

Your Extole referral program is just as interesting to analyze as any of your other marketing channels. Integrating with Marketo allows you to track the status and success of your referral channel and compare it to your other channels. You will be able to see the total number of leads, all opportunities, and every closed deal that is generated through your referral programs.

Getting Started

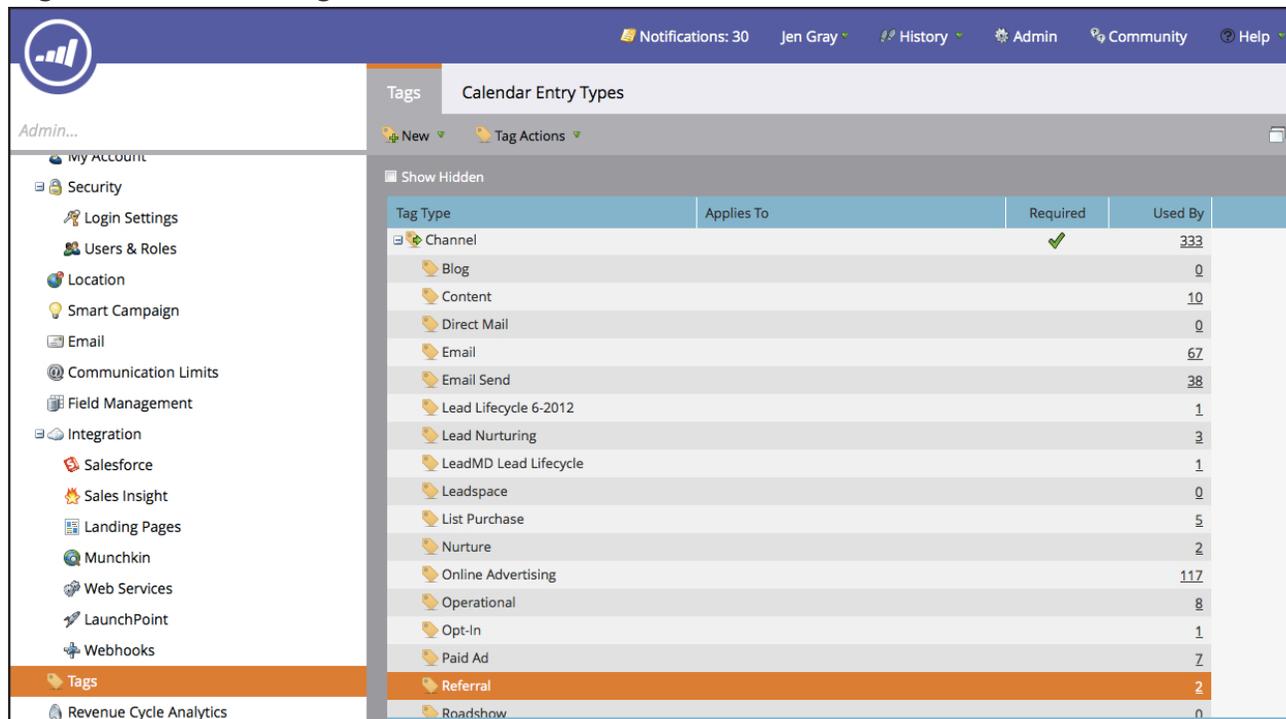
Integrating Extole and Marketo typically involves these steps, detailed in the following sections:

1. Marketo initial setup
2. Salesforce.com initial setup
3. Marketo advocate and friend programs
4. Advocate sharing through Extole platform

MARKETO INITIAL SETUP

You'll need to do some admin setup in Marketo to establish your referral channel. To create this:

1. Navigate to Admin > Tags > New > New Channel.



2. Set the channel name as "Referral" or equivalent.
3. Under Analytics Behavior, select Inclusive (regardless of period cost).
4. Add in the following steps and statuses:
 - a. Member or Sent – Step 10
 - b. Clicked or Visited – Step 20
 - c. Converted – Step 30 (select the Success box)



SALESFORCE.COM INITIAL SETUP

After your referral channel has been set up, there are just a few fields in your CRM (Extole uses Salesforce) that need to be created. To configure your referral program in Salesforce:

1. Navigate to Setup > Admin > Build > Customize > Leads > Fields.
2. Tap Lead Source.
3. Next to Account/Lead Source Picklist Values, tap New.
4. Add "Referral Program" as an additional value to the Lead Source field on the Lead Object.



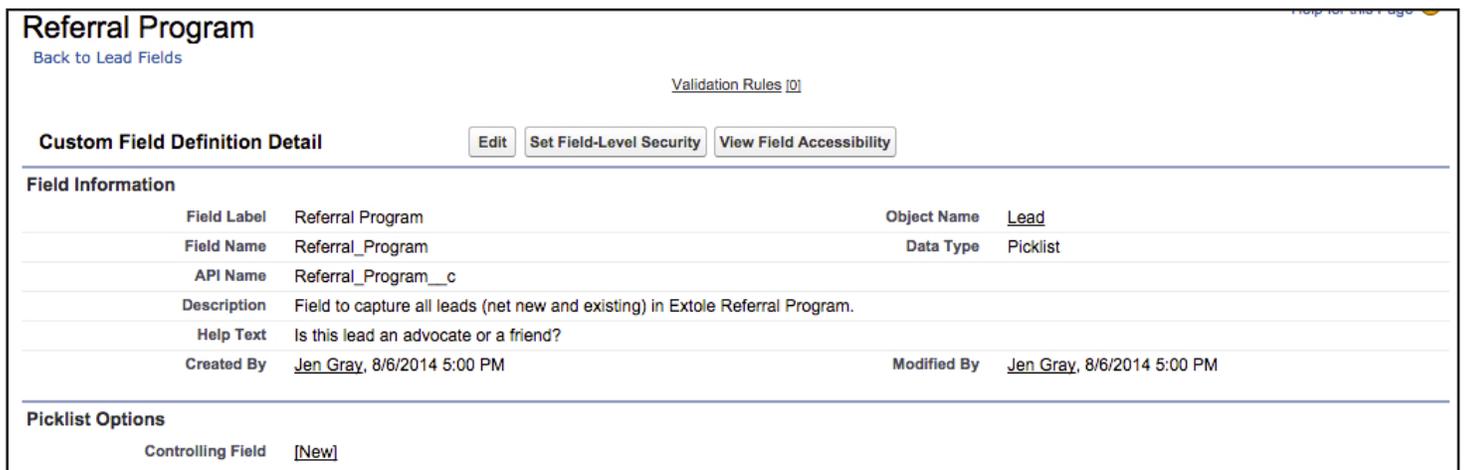
Lead Source
[Back to Opportunity Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Lead Source	Field Name	LeadSource
Data Type	Picklist		
Help Text			

5. Return to the Fields menu and tap Campaign field (custom).
6. Next to Picklist Values, tap New.
7. Add "Advocate Program" and "Friend Program" as additional values to the Campaign field (custom) on the Lead Object.
8. Return to the Fields menu.
9. Create a custom picklist field on the Lead Object and name it "Referral Program" with the following values:
 - a. Advocate
 - b. Friend



Referral Program
[Back to Lead Fields](#)

[Validation Rules \[0\]](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Referral Program	Object Name	Lead
Field Name	Referral_Program	Data Type	Picklist
API Name	Referral_Program__c		
Description	Field to capture all leads (net new and existing) in Extole Referral Program.		
Help Text	Is this lead an advocate or a friend?		
Created By	Jen Gray , 8/6/2014 5:00 PM	Modified By	Jen Gray , 8/6/2014 5:00 PM

Picklist Options

Controlling Field [\[New\]](#)



Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Values Help](#) [?](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del	Advocate	<input type="checkbox"/>	Assigned dynamically	Jen Gray , 8/6/2014 5:00 PM
Edit Del	Friend	<input type="checkbox"/>	Assigned dynamically	Jen Gray , 8/6/2014 5:00 PM

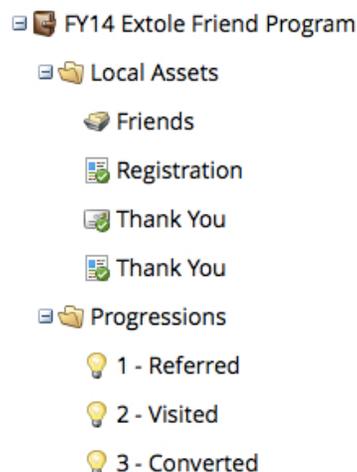
10. Create a custom text field on the Lead Object and name it "Partner Conversion ID."
11. Navigate to Setup > Build > Customize > Opportunities > Fields.
 - a. Create a custom text field and name it "Partner Conversion ID."
12. Navigate to Setup > Build > Customize > Leads > Fields.
 - a. Tap Lead Mapping.
 - b. Map the Lead.Partner Conversion ID field to the Opportunity.Partner Conversion ID field.

Lead Custom Field Mapping	
Take this lead custom field...	...and map it to this field
Added to Campaign	--None--
Additional Information	None Available
Alexa Rank	--None--
Alternate email	Contact.Alternate email
Average Daily Pageviews	--None--
BDR Rep	Opportunity.BDR Rep
Buying Cycle	--None--
Campaign Type	Opportunity.Campaign (from Lead)

MARKETO ADVOCATE AND FRIEND PROGRAMS

To set up specific advocate and friend tracking in Marketo, you need to create two referral programs in Marketing Activities:

1. Create a new Program named "Advocate Program" with the Channel set to Referral.
 - a. Add a static list named "Advocates" under a Local Assets folder.
 - b. Create a Progression Status (Trigger Campaign) named "Converted."
2. Create a new Program named "Friend Program" with the Channel set to Referral.
 - a. Add the following to a Local Assets folder: a static list named "Friends," a "Registration" landing page, a "Thank You" landing page, and a "Thank You" email.
 - b. Create the following Progression Statuses (Trigger Campaigns): "Referred," "Visited," and "Converted."

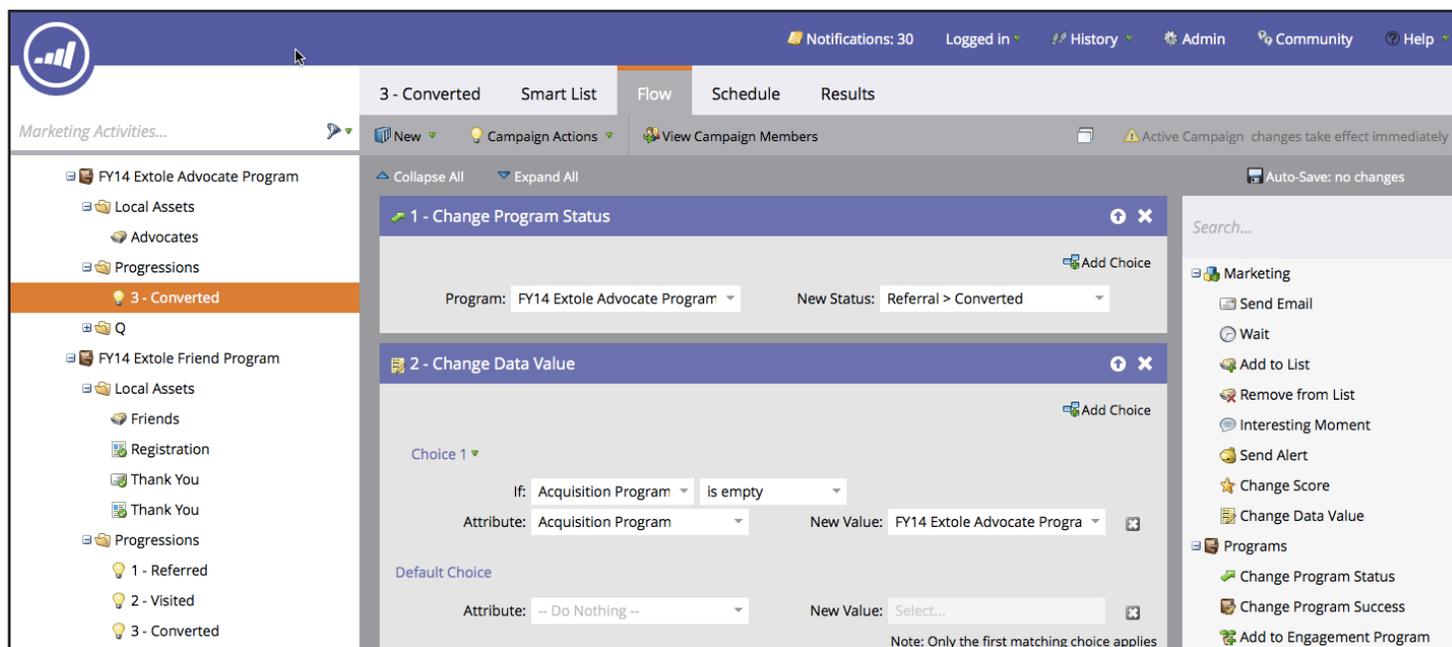


ADVOCATE CONVERSION STEPS AND CAMPAIGN DETAILS

When an advocate converts on first step of the referral experience (email share), the advocate leads are synced to a Marketo generated Salesforce campaign (e.g., FY14 Extole Advocate Program).

To configure your advocate conversion steps, create the following Converted Campaign details:

1. Add to the Smart List:
 - a. Use Added to List trigger
 - b. List Name is [NAME] Advocate Program.Advocates
2. Add to the Flow:
 - a. Change Program Status: Program – [NAME] Advocate Program, New Status – Referral Program > Converted
 - b. Change Data Value: add choice for Acquisition Program, If Acquisition Program = is empty, then Acquisition Program = [NAME] Advocate Program
 - c. Change Data Value: add choice for Lead Source. If Lead Source = is empty, then Lead Source = Referral Program
 - d. Change Data Value: add choice for Campaign. If Campaign = is empty, then Campaign = Advocate Program
 - e. Change Data Value: add choice for Referral Program. If Referral Program = is empty, then Referral Program = Advocate
 - f. Sync Lead to SFDC: use normal Lead Syncing rules (specific to organization)
3. Under Schedule, tap Activate.



The screenshot displays the Marketo interface for configuring a campaign. The top navigation bar includes 'Notifications: 30', 'Logged in', 'History', 'Admin', 'Community', and 'Help'. The main content area is divided into several sections:

- Left Sidebar:** Lists marketing activities under 'FY14 Extole Advocate Program', including 'Local Assets', 'Advocates', 'Progressions', and '3 - Converted' (highlighted).
- Top Tabs:** '3 - Converted', 'Smart List', 'Flow', 'Schedule', and 'Results'. The 'Flow' tab is active.
- Main Content Area:** Shows two flow steps:
 - Step 1 - Change Program Status:** Program: FY14 Extole Advocate Program, New Status: Referral > Converted.
 - Step 2 - Change Data Value:** Includes a choice for 'Acquisition Program' with the condition 'If: Acquisition Program is empty' and a 'Default Choice' for 'Acquisition Program'.
- Right Sidebar:** A search bar and a list of actions such as 'Send Email', 'Wait', 'Add to List', 'Remove from List', 'Interesting Moment', 'Send Alert', 'Change Score', 'Change Data Value', 'Change Program Status', 'Change Program Success', and 'Add to Engagement Program'.

FRIEND CONVERSION STEPS AND CAMPAIGN DETAILS

A friend converts converts when they fill out the form on a client-hosted landing page that an advocate has shared with them. The friend leads are synced to a Marketo generated Salesforce campaign (e.g., FY14 Extole Friend Program).

To configure your friend conversion steps, create the following Referred Campaign details:

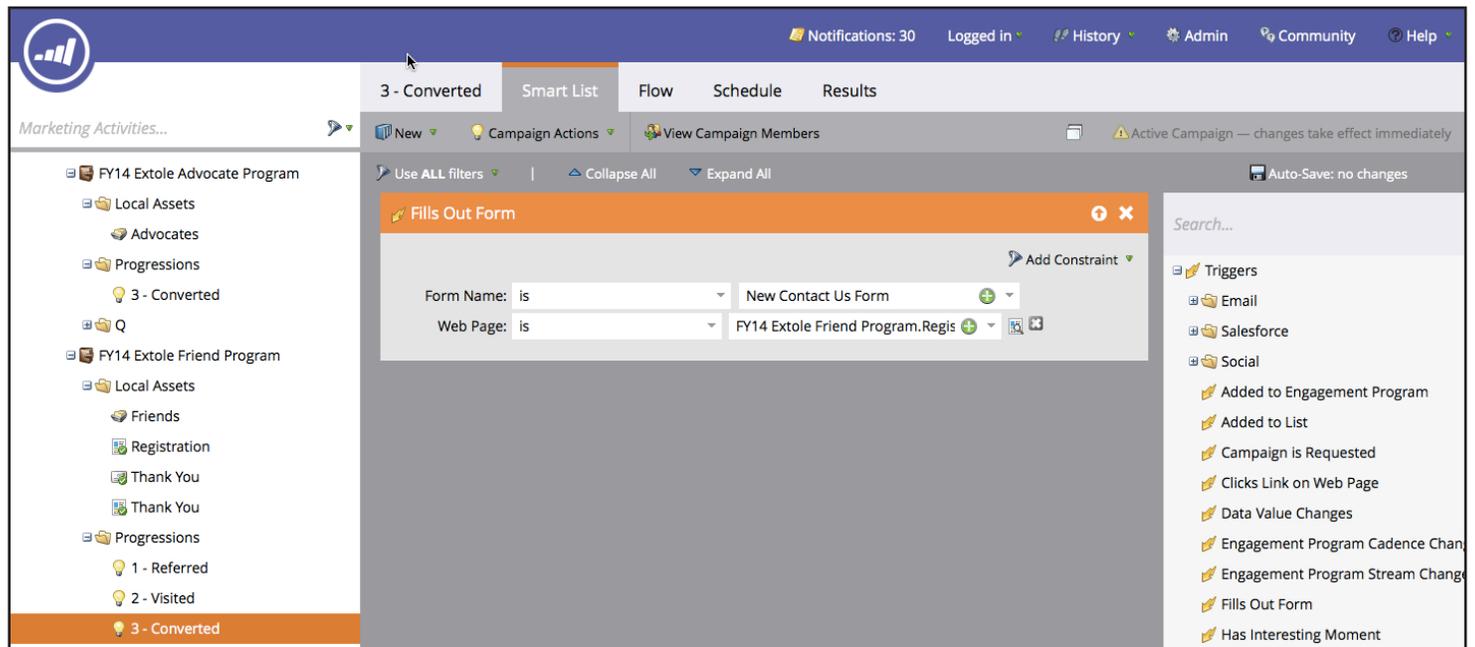
1. Add to the Smart List:
 - a. Use Added to List trigger
 - b. List Name is [NAME] Friend Program.Friends
2. Add to the Flow:
 - a. Change Program Status: Program – [NAME] Friend Program, New Status – Referral Program > Member or Sent
 - b. Change Data Value: add choice for Acquisition Program, If Acquisition Program = is empty, then Acquisition Program = [NAME] Friend Program
 - c. Change Data Value: add choice for Lead Source. If Lead Source = is empty, then Lead Source = Referral Program
 - d. Change Data Value: add choice for Campaign. If Campaign = is empty, then Campaign = Friend Program
 - e. Change Data Value: add choice for Referral Program. If Referral Program = is empty, then Referral Program = Friend
3. Under Schedule, tap Activate.

Create the following Visited Campaign details:

1. Add to the Smart List:
 - a. Use Visits Web Page trigger
 - b. Web Page is: [NAME] Friend Program.Registration
2. Add to the Flow:
 - a. Change Program Status: Program – [NAME] Friend Program, New Status – Referral Program > Clicked or Visited
3. Under Schedule, tap Activate.

Create the following Converted Campaign details:

1. Add to the Smart List:
 - a. Use Fills out Form trigger
 - b. Form Name: [NAME] Form (on registration page)
 - c. Web Page is: [NAME] Friend Program.Registration
2. Add to the Flow:
 - a. Change Program Status: Program – [NAME] Friend Program, New Status – Referral Program > Converted
 - b. Send Email: [NAME] Friend Program.Thank You
 - c. Sync Lead to SFDC: use normal Lead Syncing rules (specific to your organization)
3. Under Schedule, tap Activate.



ADVOCATE SHARING THROUGH EXTOLE

The last step to integrating the Extole platform with Marketo requires using the Marketo REST API to pass email addresses to the local static lists you created for advocates and friends in previous steps. Work with your developer and your Extole Client Services Manager to implement the following process:

1. An advocate enters their email and their friend's email into the Extole share experience.
2. Extole powers the referral from the advocate to the friend.
3. A Marketo API request passes the advocate and friend email addresses to the appropriate static lists within the indicated Marketo referral programs.
 - a. As a first step to working with the Marketo REST API, you'll need to [securely authenticate](#).
 - b. A Marketo administrator will need to create a [custom service](#) before a client application can begin calling the Marketo APIs.
 - c. Each time a share occurs in Extole, use the Marketo API to [create/update a lead](#), retrieve the "lead id" from the response, and [add the lead to appropriate the static list](#).

The following image shows the static list for advocates in Marketo that will be updated via the API.

Note: All Marketo implementations are unique. Integration details are subject to change based on different use cases of Marketo.

About Extole

Extole helps marketers acquire customers at scale by rewarding existing customers. With Extole, marketers can create a complete, efficient, and reliable acquisition channel by encouraging their customers to share their brand, products, or content.



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