

The First 100 Days of Marketo

A checklist to jumpstart your implementation success

Whether you're installing marketing automation for the first time or migrating from another platform, how you prepare for your Marketo implementation and the processes you put in place now provides a solid foundation for the future of your marketing operations.

Implementations typically follow a 4-phase format; here's what you should be considering in each to maximize your success.

The Planning Phase

Ready, Set... Don't Go Yet!

The good news is that the first phase of implementing Marketo can begin before you even sign your contract. In this phase, you'll make several critical decisions in advance of your implementation, to maximize the efficiency of your first 100 days. This phase is all about planning.

- Define roles for marketing operations and Marketo users
- Align expectations amongst stakeholders
- Decide if a Marketo sandbox would be beneficial
- Clean your data and create a data dictionary
- Understand compliance policies and requirements

The Technical Implementation Phase

Let's Get Technical!

For this phase, you'll need to line up your technical resources. For example, when creating your email link tracking domains, your IT team will work with you to address deliverability requirements. For maximum success in this phase, have a plan in place to work with IT and your CRM administrator.

- Deploy Munchkin code
- Configure email and landing page domains
- Discuss CRM integration and sync
- Set up Marketo users and roles
- Decide if you need IP warming

The Building Phase

Prioritize and Organize!

Welcome to the fun part! By now, you should begin to see progress in your Marketo instance as program templates are built out, people are in your database, and your team begins training. Now in the building phase, it's time to prioritize and organize!

- Decide on folder structures and naming conventions
- Define your lead source strategy
- Choose your most important marketing initiatives
- Discuss templates with your agency: which fully-tokenized program templates will they provide?
- Provide your agency with design mockups for email and landing page templates
- Invest in training for your team

The Launch Phase

Go-Live and Thrive!

Congratulations! You are now ready to launch your first campaigns and will begin to see the results! Note this phase goes beyond 100 days; this is a continual building on your foundation of best practice programs, and where you begin to personalize engagement with your customers. In this phase, sales and marketing alignment is crucial for determining your lead lifecycle and scoring requirements.

- Launch your first campaigns
- Begin measuring success with reports
- Develop personas for lead scoring
- Implement lead scoring and lead lifecycle
- Implement advanced nurturing

With any implementation, it doesn't stop after 100 days. Create a memorable customer experience through flawless marketing operations, leveraging the power of Marketo— [contact us](#) to discuss your vision!

The power of Marketo. Perfected.



SPECIALIZED Marketo Engage