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An Ultimate Guide for Successful HubSpot to Marketo Migration

[Blueprint from a Unicorn]

Why Migrate?

There can be several reasons why organizations might consider migrating from HubSpot to Marketo and Salesforce. Some of these reasons include the following:

Scalability: As businesses grow, they may need a more robust marketing automation platform to handle more leads and campaigns. Marketo and Salesforce are designed to scale with businesses and can accommodate the needs of organizations of all sizes.

Advanced marketing capabilities: Marketo and Salesforce offer a wider range of marketing automation features and capabilities, including advanced lead scoring, segmentation, personalization, and multi-channel campaigns.

Integration with Salesforce CRM: Salesforce is a widely used customer relationship management (CRM) platform, and Marketo integrates seamlessly. This integration allows organizations to leverage the power of both platforms to manage their customer data and relationships more effectively.

Improved data management: Marketo and Salesforce provide more robust data management capabilities, including data segmentation, reporting, and analysis. This helps organizations make more informed decisions and provides a clearer picture of their customer base.

Increased ROI: Marketo and Salesforce are designed to help organizations generate more leads and conversions, which can result in a higher return on investment (ROI). Additionally, the scalability of these platforms can help organizations avoid the cost of upgrading to a more powerful solution as they grow.

It's important to note that migration from HubSpot to Marketo and Salesforce can be complex. Organizations must work with experienced consultants and developers to ensure a smooth transition.

Latest Cool features:

Additional Screens in the Next-Generation Experience	Self-Service Flow Steps	Dynamic Chat
Microsoft Dynamic Integration	Email Connection Throttling	Salesforce Activity Detail Customization
Filtering Email Bot Activity	Priority Override for Triggers Campaigns	New Form Validation Rules

Modern User Interface

The Next-Generation Experience offers additional screens to Marketo users, with a new design and improved usability. This feature can be accessed via a toggle switch and includes landing page asset details in the Design Studio and Marketing Activities.

Dynamic Chat

Dynamic Chat enhances website opportunities by offering 1:1 personalized conversations with leads and accounts. This feature allows Marketo users to utilize chat as a key component of the integrated cross-channel B2B marketing and sales experience. Dynamic Chat's key features include booking meetings directly within the chat, lead routing, a starter template, and drag-and-drop conversation creation.

Marketo Measure

The upgraded version for Marketo Measure, formerly known as Bizible offers complete B2B attribution capabilities for enterprises with multiple instances of CRM and/or Marketo Engage and diverse source data needs. Additionally, it provides a B2B attribution solution for Adobe Real-Time CDP by sharing Adobe Experience Platform (AEP) data.

Filtering Email Bot Activity

The Filtering Email Bot Activity feature enables logging and filtering of activities identified as being performed by bots. Admins can opt-in to the Filtering Email Bot Activity feature to log and filter bot-identified activities and trigger actions based on them.

Priority Override for Trigger Campaigns

The Priority Override for Trigger Campaigns feature allows the administrator to override Marketo's determined priority for trigger campaigns to align with business goals. This feature can be viewed in the Campaign Queue under Marketing Activities.

Validation Rules

Marketo's new Form Validation Rules allow for maintenance of the database health by blocking undesirable email domains from submitting Marketo Forms. Admins can define a blocklist or enable a pre-defined list of free consumer domains to block from forms. These latest features in Marketo equip users with the tools to bring operational efficiency and excellence across teams.

Better results after migration

After migrating from Hubspot to Marketo, several results can be achieved, such as:

- **Improved lead management:** Marketo provides advanced lead nurturing and scoring capabilities to help organizations manage and track leads better.
- **Enhanced automation:** Marketo's robust automation capabilities allow more efficient and effective marketing campaigns.
- **Better data insights:** Marketo provides robust analytics and reporting capabilities, allowing organizations to understand their customers and campaigns better.
- **Seamless integration:** Marketo integrates seamlessly with other enterprise systems, such as Salesforce, enabling organizations to streamline their sales and marketing processes.
- **Increased efficiency:** Marketo's user-friendly interface and streamlined processes can help increase the efficiency of marketing teams.
- **Enhanced customer experience:** Marketo's personalization and targeting capabilities can help organizations provide a more relevant and engaging customer experience.

The outcome of closer collaboration between disparate teams such as sales and marketing can lead to substantial improvements, including:

- An increase of **100-200%** in digital marketing return on investment (ROI)
- A **10%** rise in the acceptance rate of leads
- A boost of **15-20%** in internal customer satisfaction
- A reduction of **30%** in go-to-market expenses

Migration from Hubspot to Marketo can provide organizations with the tools and capabilities to improve their marketing performance and drive business growth.

Best practices for smooth migration

Marketers, are you prepared for a smooth transition from Hubspot to Marketo? Don't be fooled into thinking that a simple click of a button will solve all your problems. Migrating systems and data takes careful planning, strategy, and diligence. At Xgrid, we have mastered the art of Marketo migrations and are here to share our secrets for success.

- To revamp your engagement, start by creating a comprehensive inventory of your existing landing pages and assets. Design new forms and landing pages that can be easily cloned for deployment. Determine the best approach for backfilling intelligence for older landing pages and redirect all old pages to the new ones. Plan for new processes when a lead fills out a form.
- Strengthen your data foundation by ensuring that your data is clean and free of any bad data before merging. Normalize your data if necessary and transfer only the required fields, avoiding similar fields to avoid confusion. Account for unsubscribed and subscription information, and consider duplicate data during the migration process.
- Use the migration period as an opportunity to transform your business processes. Evaluate what is working and what is not, and make necessary

adjustments during the migration. Take advantage of the opportunity to standardize sales processes, products offered, and lead lifecycle methodologies.

- Communicate with your customers and prospects through multiple systems during the migration, as necessary. Develop a short-term plan and stick to it. Launch extra marketing efforts during the migration period to ensure that your audience continues to hear from you.

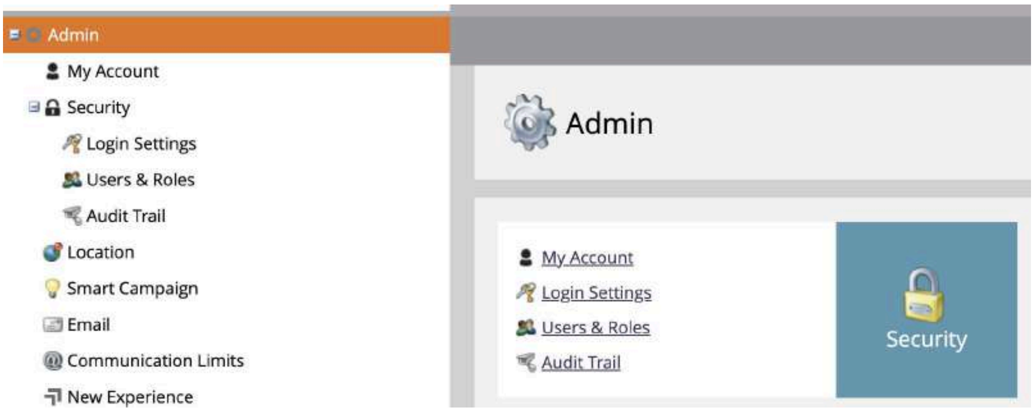
Steps

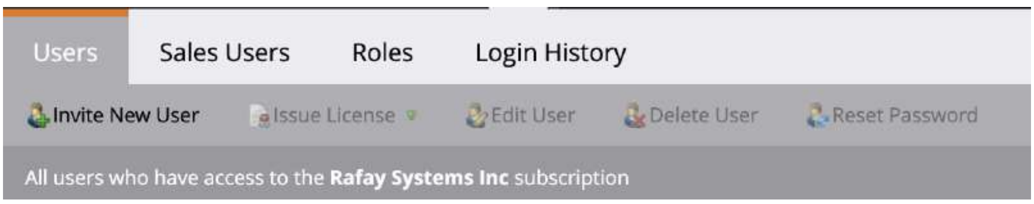
Admin Configurations

Set up Users & Roles

To create a user in Marketo, follow these steps:

- Navigate to the **Admin→ Security→ Users & Roles** section.
- Select the **Users** tab and click **Invite New User** in the top-right corner.
- Fill out the required information for the new user, including their email address, first and last name, and select a username and password for the user.
- To assign a role, click on their name to edit their profile. Select the appropriate role from the dropdown menu.





- To create a new role, navigate to the Roles section of the user's profile, click the "Add" button to assign a new role and specify the permissions accordingly. Hit “Create” to complete the step.
- Select the appropriate role from the dropdown menu.
- Click the "Save" button to create the new user.

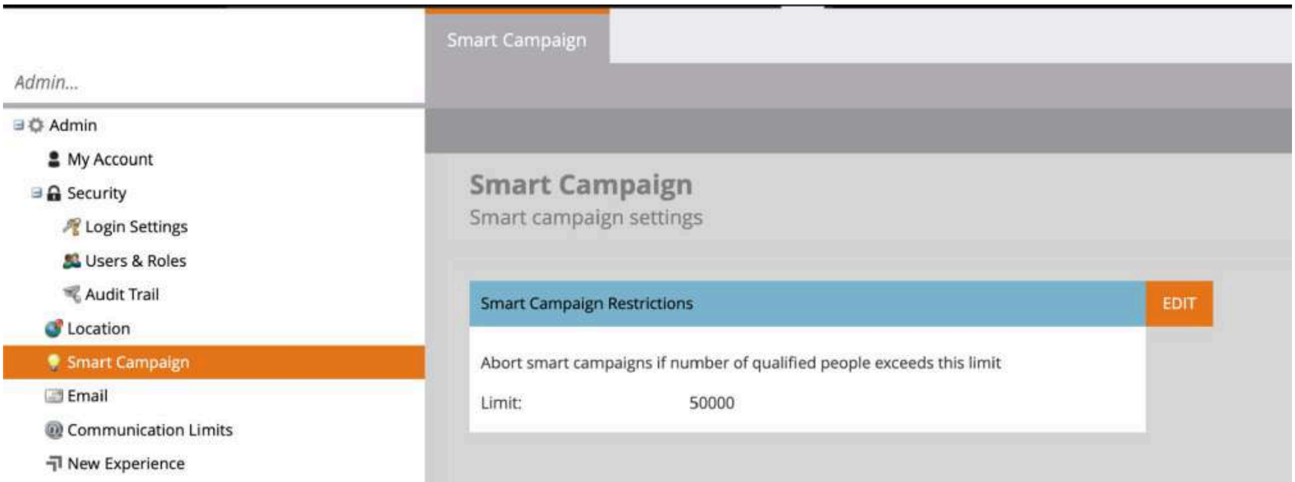
Once the user is created, they will receive an email with instructions on how to access their new Marketo account. They will be able to log in using the username and password you assigned to them and will have access to the features and functionality based on the roles you assigned to them.

Smart Campaign Settings

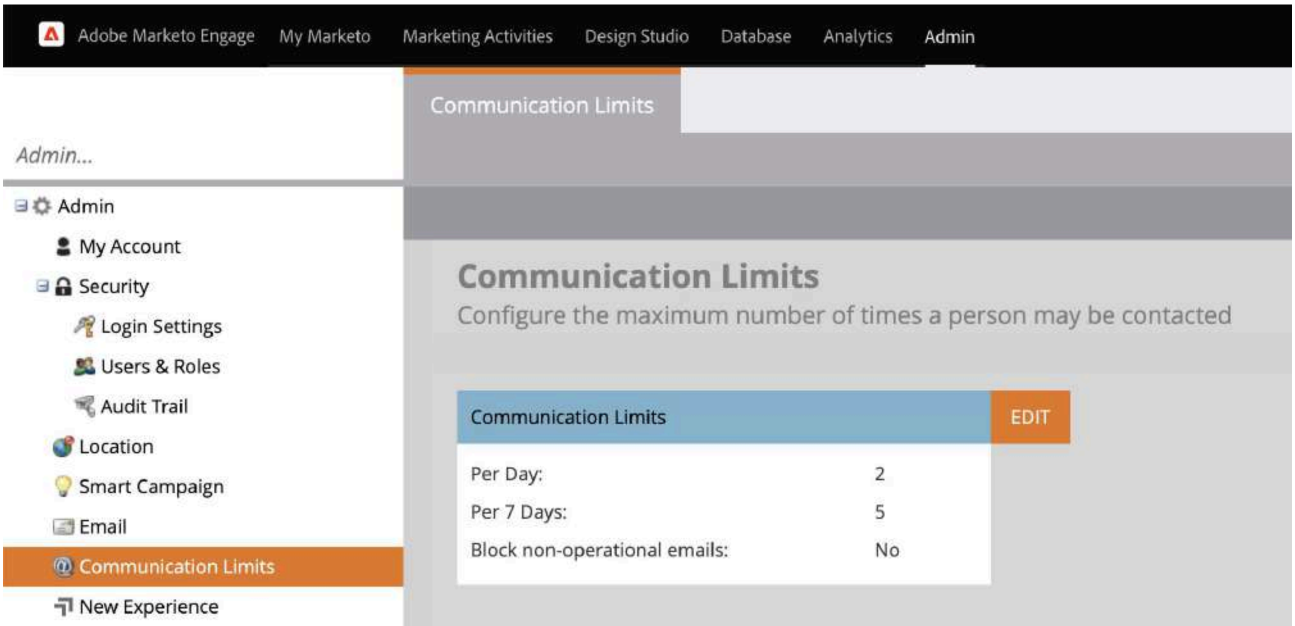
Marketo has a helpful feature that allows you to restrict the maximum number of individuals that can qualify for a smart campaign. This functionality is particularly useful as it helps prevent the unintended sending of mass emails to your entire database.

It is important to note that this feature is only applicable to batch campaigns and email programs and not to triggered campaigns. When a batch campaign or email program is triggered, Marketo checks the total number of individuals that qualify for the campaign and compares it against the maximum limit set by the user. If the number of qualifying individuals exceeds the limit, Marketo will automatically exclude the additional individuals from the campaign.

It is worth mentioning that this limit is applied to all smart campaigns in your Marketo instance, but it can be overridden at the campaign level if required. This allows you to set specific person limits for individual campaigns and tailor your targeting to suit your needs. To override the person restrictions for all programs, navigate to the **Admin→ Smart Campaign** and configure the limit.



Navigate to the **Admin→ Communication Limits** to set the limit on maximum number of times, a person can be contacted. Review the default settings for communication limits, including the maximum number of emails, direct mail pieces, and sales activities that can be sent per day.



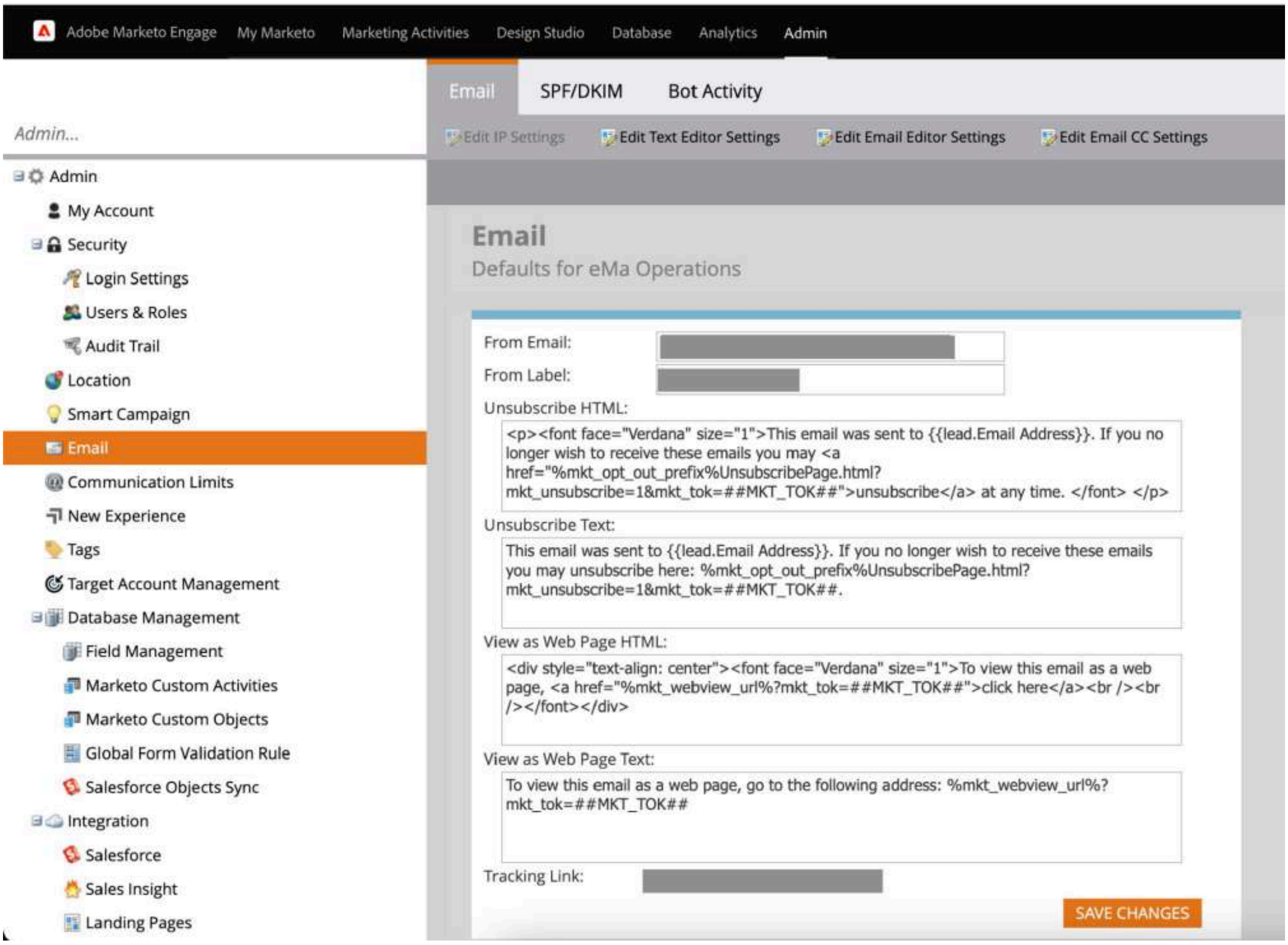
Following these steps, you can easily override the system-level person restrictions and set specific limits for your smart campaigns. This feature is a valuable tool that can help you maintain a clean and organized database while also improving the effectiveness and precision of your marketing campaigns.

Email Settings

This feature allows you to customize the default settings, including email authentication and deliverability, sender details, and subscription management, to ensure your emails are delivered successfully and effectively to your target audience.

To configure email settings in Marketo, follow these steps:

- Navigate to the **Admin→ Email.**
- Select "Email Settings" from the dropdown menu.
- Review the default settings, including the email authentication and deliverability settings.
- If necessary, update the settings to reflect your email service provider (ESP) and email authentication settings.
- Under the "Email Deliverability" section, configure the following settings:
- Sender Email Address: Set the default sender email address for all emails sent from Marketo.
- Sender Name: Set the default sender name for all emails sent from Marketo.
- Reply-To Email Address: Set the email address to which replies should be sent.
- Bounce Email Address: Set the email address to which bounce notifications should be sent.
- Under the "Subscription Management" section, configure the following settings:
- Subscription Management Type: Select the type of subscription management you want to use, either "Marketo Subscription Management" or "Custom Subscription Management."
- Subscription Management Landing Page: Set the URL of the landing page where users can manage their subscription preferences.
- Email Footer: Customize the text that appears at the bottom of your emails.
- Click the Save button to **save** your changes.



SPF/DKIM Configuration

SPF (Sender Policy Framework) and DKIM (Domain Keys Identified Mail) authentication are important best practices in email marketing, and Marketo makes it easy to set up and verify these settings.

Following these steps, you can set up SPF and DKIM authentication in Marketo to improve your email delivery rates and protect against fraud and phishing attacks.

- Navigate to the **Admin→ Email.** Select the **SPF/DKIM** tab and click on **Add Domain.**
- Under the "Authentication" section, click on the "Add SPF Record" button.
- In the "Add an SPF Record" dialog box, enter the domain(s) you want to authenticate with SPF, such as your company's domain or subdomain. Click "Add" to save the record.
- Next, click on the "Add DKIM Selector" button.
- In the "Add a DKIM Selector" dialog box, enter a name for the selector, such as "mkto" or "marketodkim." Click "Add" to save the selector.

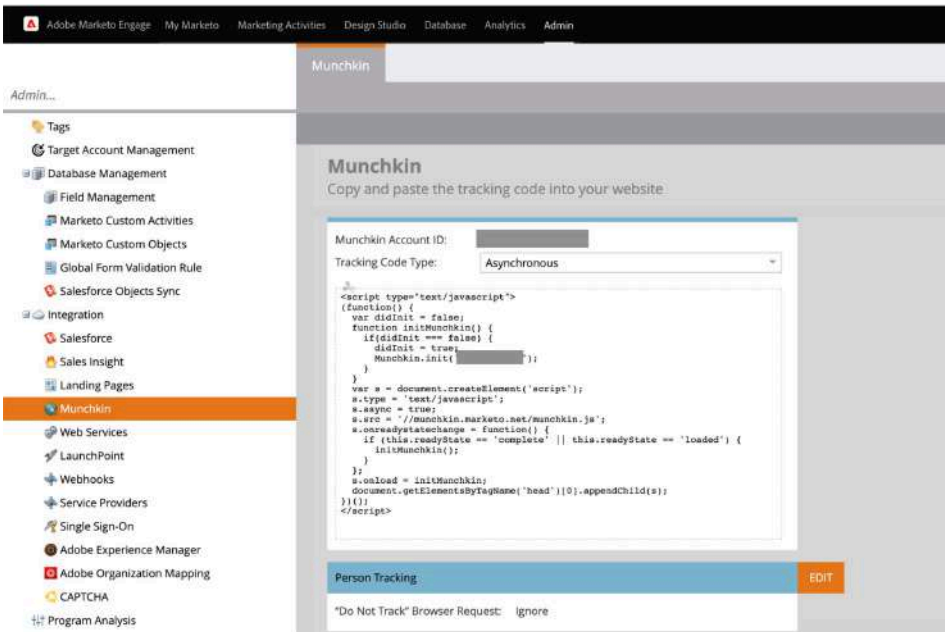
- Marketo will provide two CNAME records to add to your DNS settings. Add these records to your DNS settings as instructed by your DNS provider.
- After you have added the CNAME records, return to the "Email Settings" page in Marketo and click on the "Verify SPF/DKIM" button to confirm that your settings have been successfully verified.
- If your SPF and DKIM settings are verified successfully, you're done! If not, double-check your DNS settings and try again.

Munchkin

Once you have enabled Munchkin tracking, you can track the activity of website visitors who have interacted with your Marketo forms, landing pages, and emails. The Munchkin tracking data can help you gain insights into your website visitors' behavior, such as which pages they visited and how long they stayed on each page. You can use this data to create targeted marketing campaigns and improve your website content to engage your audience better.

To enable Munchkin tracking using Marketo, follow these steps:

- Navigate to the **Admin→ Tags.**
- To enable Munchkin tracking on your website, you will need to add the Munchkin tracking code to your website pages.
- Copy the tracking code and add it to the header of your website pages before the closing </head> tag.
- Save and publish your website changes.

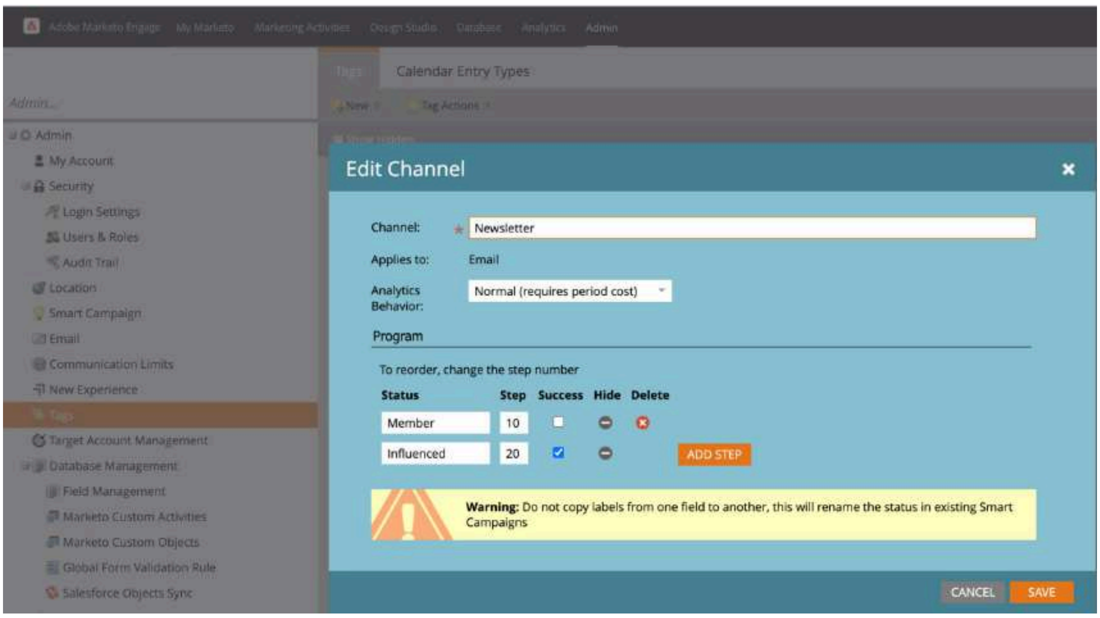


Tags & Channels

Marketo programs can be thought of as fundamental building blocks. You can easily filter data for reporting by employing tags and channels. Tags are employed to characterize programs and can be created in unlimited quantities, each with its own distinct values. Channels, on the other hand, identify the delivery method of a program, such as a webinar, sponsorship, or online advertisement. This setup helps you track the performance of your marketing efforts across different channels and make informed decisions about your marketing strategy.

Here are the steps to set up channels in Marketo:

- Navigate to the **Admin→ Tags.**
- Click **Add** and select **New Channel** from the dropdown menu.
- In the "New Channel" dialog box, enter a name for the channel, such as "Email" or "Social Media."
- If you want to track costs for the channel, select "Track Cost" and enter the cost per unit for the channel.
- Enter the first two program Status names, then click Add Step.Program statuses are sorted using the step number. It's important to note that individuals cannot move backward in these progression steps; they can only transition to an equivalent or higher-value status. Use equal values when statuses are meant to switch back and forth rather than follow a progression.
- Select the **Success** program status, then click the **Save** to complete the channel assignment.



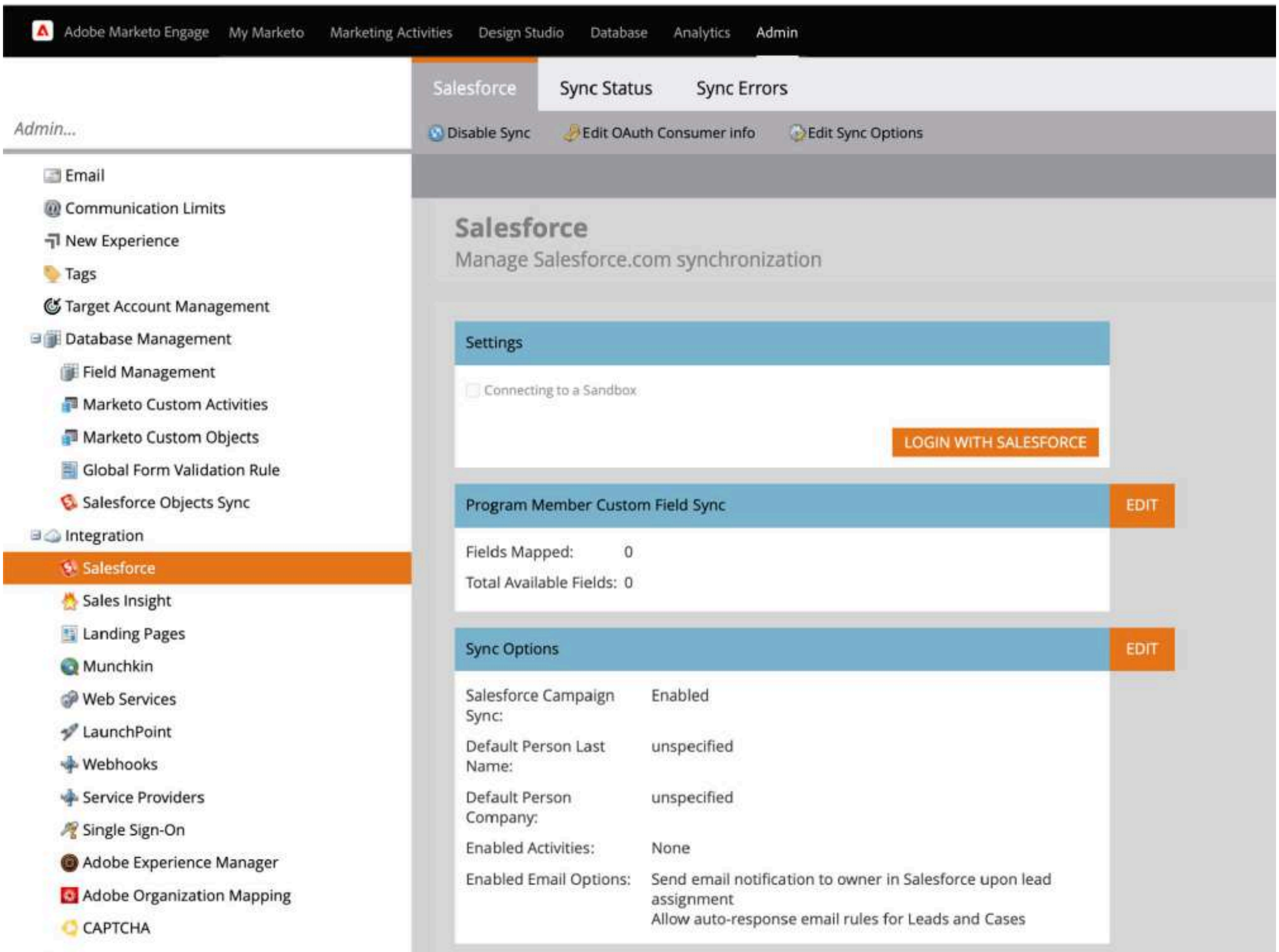
Channels might differ based on the organization's marketing strategy but some of recommended channels include Newsletter, Blog, Webinar, Tradeshows and Nurture programs.

CRM Sync for Salesforce

Once you have set up CRM sync for Salesforce in Marketo, your Marketo leads and contacts will be automatically synced with your Salesforce account according to your sync settings. This allows your sales team to access the latest information about leads and contacts in Salesforce and ensures that your marketing and sales teams are working with the same data. You can also monitor your sync activities and troubleshoot any issues in the "Sync" tab in the Salesforce section of the Admin area in Marketo.

To set up CRM sync for Salesforce in Marketo, follow these steps:

- Navigate to the **Admin→ Integration→ Salesforce** section in the left navigation bar.
- Click the Connect to **connect** your Marketo instance to Salesforce.
- Enter your Salesforce credentials and click **Login.**
- Follow the prompts to authorize Marketo to access your Salesforce account.
- Once you have connected your Marketo instance to Salesforce, you can set up CRM sync by selecting the "Sync" tab.
- Select the objects you want to sync between Marketo and Salesforce, such as leads and contacts.
- Set up the sync options for each object, such as the field mappings between Marketo and Salesforce and the sync frequency.
- Click the **Save** button to save your sync settings.



Field Management

If you are using a CRM integration, you can sync your Marketo fields with your CRM fields by clicking on the "Sync" button in the upper right-hand corner of the window. This will ensure that your Marketo and CRM fields are aligned.

Overall, field management in Marketo allows you to customize your Marketo database and capture the data you need to drive your marketing initiatives. Following these steps, you can add, update, and remove fields from your Marketo instance, ensuring that your database is accurate and up-to-date. It is best practice to create fields in CRM and marketo auto-captures all the filed details via CRM sync.

Marketo recommends creating following fields:

Field Label	Field Name	Data Type	Field Attributes
Score	mkto71_Lead_Score	Number	Length 10 Decimal Places 0
Acquisition Date	mkto71_Acquisition_Date	Date/Time	
Acquisition Program	mkto71_Acquisition_Program	Text	Length 255

As soon as a new person is added to the program membership in Marketo, it is designated as **Acquisition** by the system, thereby giving credit for **First-Touch attribution.**

Optionally, following custom fields can only also be created for detailed tracking

Field Label	Field Name	Data Type	Field Attributes
Acquisition Program Id	mkto71_Acquisition_Program_Id	Number	Length 18 Decimal Places 0
Original Referrer	mkto71_Original_Referrer	Text	Length 255
Original Search Engine	mkto71_Original_Search_Engine	Text	Length 255
Original Search Phrase	mkto71_Original_Search_Phrase	Text	Length 255
Original Source Info	mkto71_Original_Source_Info	Text	Length 255
Original Source Type	mkto71_Original_Source_Type	Text	Length 255
Inferred City	mkto71_Inferred_City	Text	Length 255
Inferred Company	mkto71_Inferred_Company	Text	Length 255
Inferred Country	mkto71_Inferred_Country	Text	Length 255
Inferred Metropolitan Area	mkto71_Inferred_Metropolitan_Area	Text	Length 255
Inferred Phone Area Code	mkto71_Inferred_Phone_Area_Code	Text	Length 255
Inferred Postal Code	mkto71_Inferred_Postal_Code	Text	Length 255
Inferred State Region	mkto71_Inferred_State_Region	Text	Length 255

Optional Configurations

Sales Insight

Marketo Sales Insight is a CRM application that provides sales teams with a direct window to marketing analytics. It offers several functionalities that enable sales teams to better understand how leads and prospects interact with campaigns and engage with your brand.

Once you have activated Sales Insight in both Marketo and Salesforce, your sales team will have access to the Sales Insight features, such as the ability to view lead and contact activity history, receive real-time alerts for important actions, and use the Sales Insight email templates to send personalized messages. You can also monitor the Sales Insight activities in the Marketo and Salesforce interfaces section and use the data to improve your sales and marketing efforts.

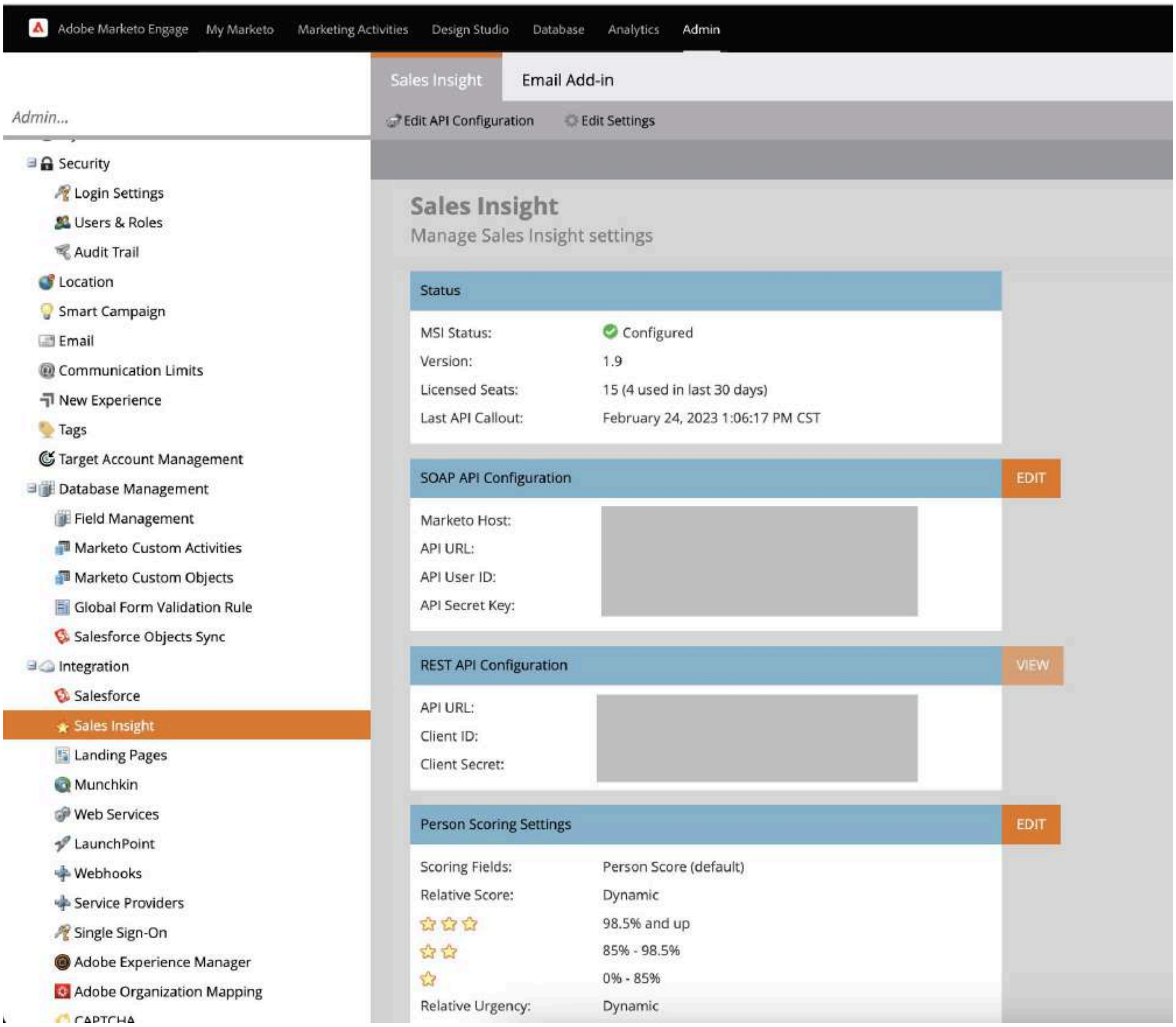
To activate Sales Insight in Marketo and Salesforce, follow these steps:

In Marketo:

- Navigate to the **Admin→ Integration** section in the left navigation bar.
- Click on the **Sales Insight** tab.

- Click the "Enable Sales Insight" button to start the setup process.
- Follow the prompts to configure the Sales Insight settings, such as choosing which fields to sync between Marketo and Salesforce and selecting the Sales Insight packages to enable.

Once you have completed the setup process, click **Finish** to save your changes.



In Salesforce:

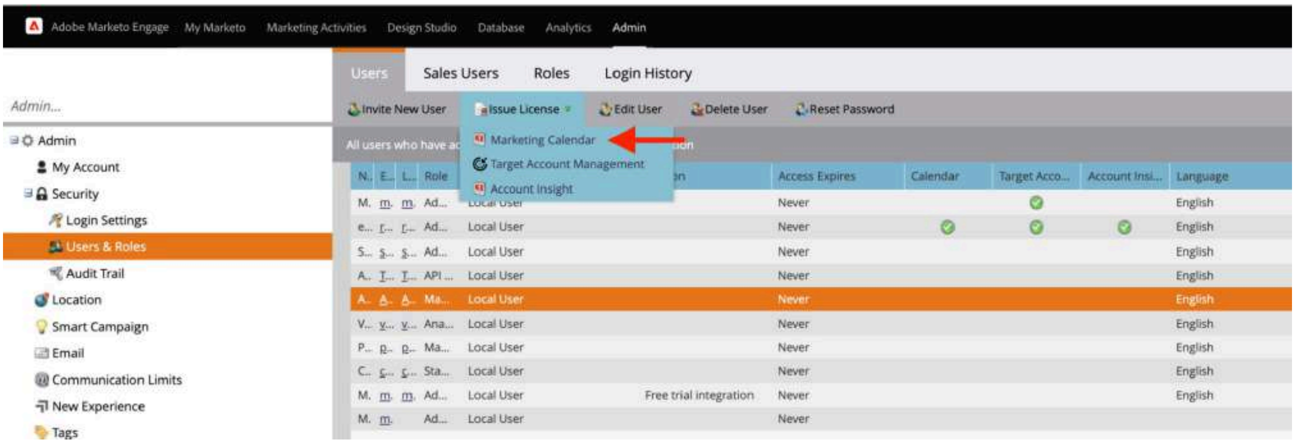
- Log in to your **Salesforce** account with an admin account.
- Navigate to the **App Launcher** and select **Sales Insight** from the list of available apps.
- Click on the **Settings** tab.
- Follow the prompts to configure the Sales Insight settings, such as setting up the Sales Insight email templates and enabling the Sales Insight dashboard components.
- Once you have completed the setup process, click the **Save** to save your changes.

Calendar

Marketo offers a calendar feature that allows you to schedule and track marketing activities, such as campaigns, events, and webinars.

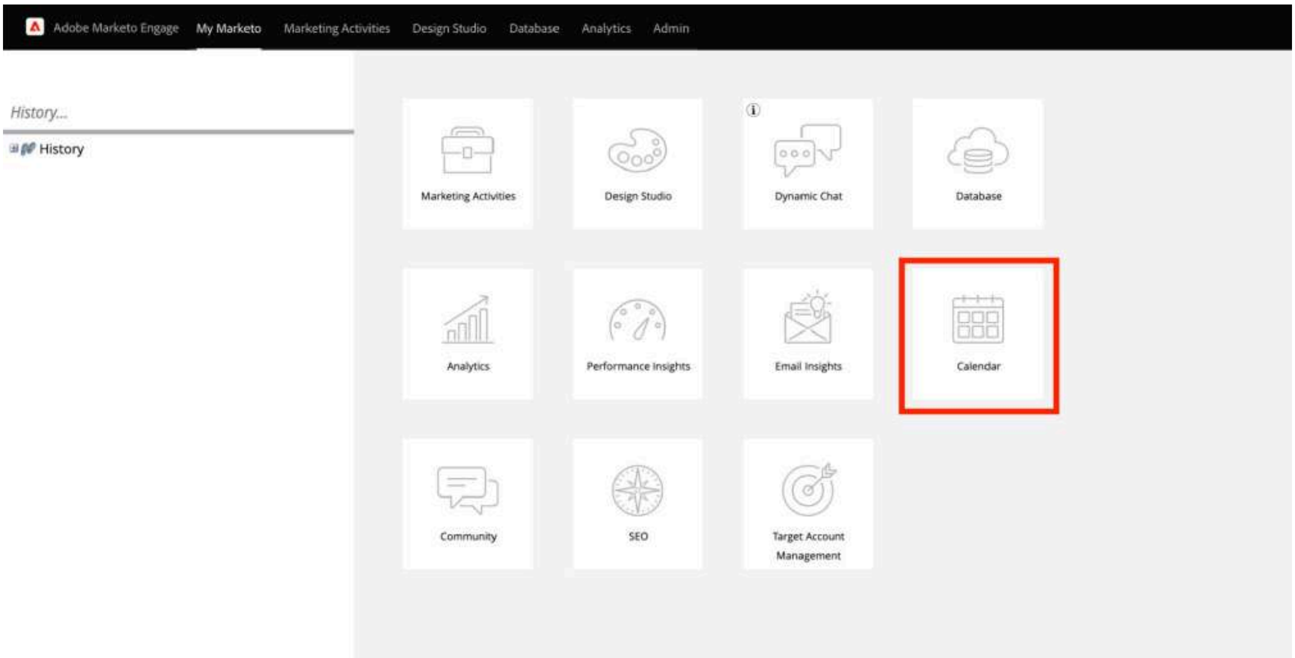
To activate the calendar in Marketo for a specific user, you will need to follow these steps:

- Log in to your Marketo instance with an admin account.
- Navigate to the "Admin" section in the top navigation bar.
- Click on "Users & Roles" in the left-hand navigation menu.
- Select the user you want to activate the calendar for.
- Under the "Permissions" tab, scroll to the "Marketing Activities" section.
- Check the "View Marketing Calendar" checkbox to enable the user to view the marketing calendar.
- If you want the user to be able to create and edit marketing activities on the calendar, also check the "Create/Edit Marketing Activities" checkbox.
- Click the "Save" button to save the changes.
- Once you have enabled the user's calendar permissions, they can access the marketing calendar in Marketo and view or create marketing activities as appropriate based on their permissions.



Note that if you want to enable calendar access for multiple users at once, you can use user roles to apply the necessary permissions to a group of users. By creating a role with the appropriate calendar permissions and assigning it to the relevant users, you can streamline the process of enabling calendar access for multiple users.

- Navigate to the "My Marketo" section in the top navigation bar.
- Click on the "Calendar" tab.
- If the calendar is not yet activated, you will see a prompt to activate it. Click on the "Activate Calendar" button.



- In the "Activate Calendar" dialog box, select the calendar you want to use for your marketing activities, such as "Marketing Calendar" or "Sales Calendar."
- If you want to add the calendar to your Google Calendar or Outlook, select the appropriate option and follow the instructions.
- Click the "Activate" button to activate the calendar.
- Once you have activated the calendar, you can schedule and track your marketing activities. To add a new activity to the calendar, follow these steps:
- Click on the date and time you want to schedule the activity for on the calendar.
- Select the activity you want to schedule in the "New Event" dialog box, such as a campaign or event.
- Enter the details of the activity, such as the name, start and end time, and location.
- Click the "Save" button to add the activity to the calendar.

Database Management

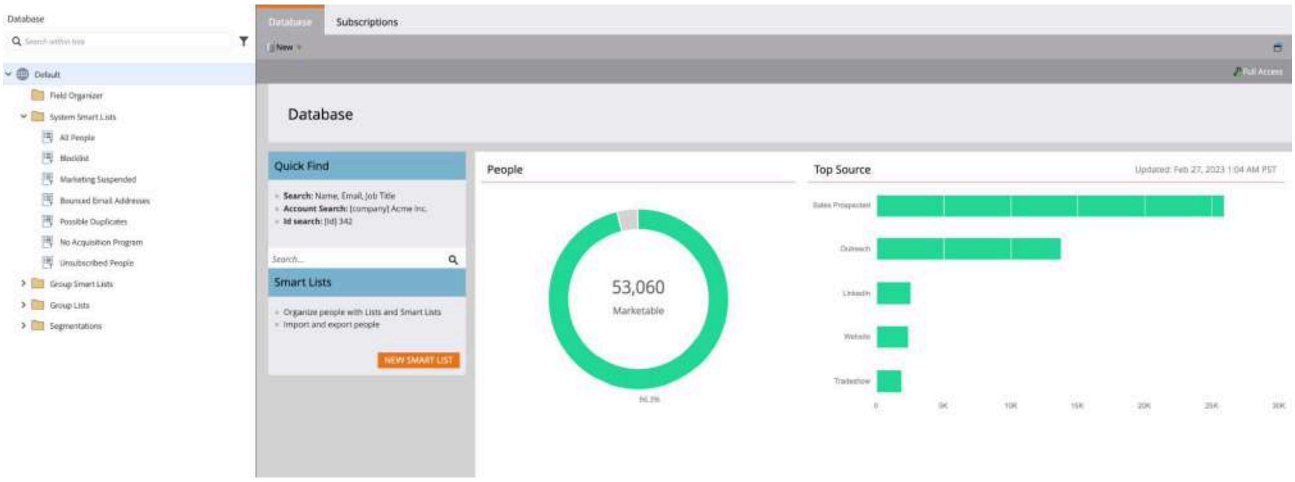
Data Dashboard

The Marketo Database Dashboard is a web-based tool that provides users with real-time data visualization of their database. It is a central hub for managing and analyzing lead and customer data within the Marketo platform.It displays critical metrics such as the size of the database, distribution of records, and data quality, using interactive charts, graphs, and tables. The tool leverages data from various sources within Marketo, including forms, landing pages, and programs. Users can customize their Dashboard by selecting the key metrics they want to track and creating custom reports. They can also use filters to view data by specific timeframes or subsets of the database.

System Smart Lists

Smart lists are powerful tools used to segment your audience based on specific criteria and to perform actions on these segments, such as sending emails or updating records. The dashboard provides an overview of the health of your database and enables you to manage and analyze your data in various ways. Some of the system smart lists include:

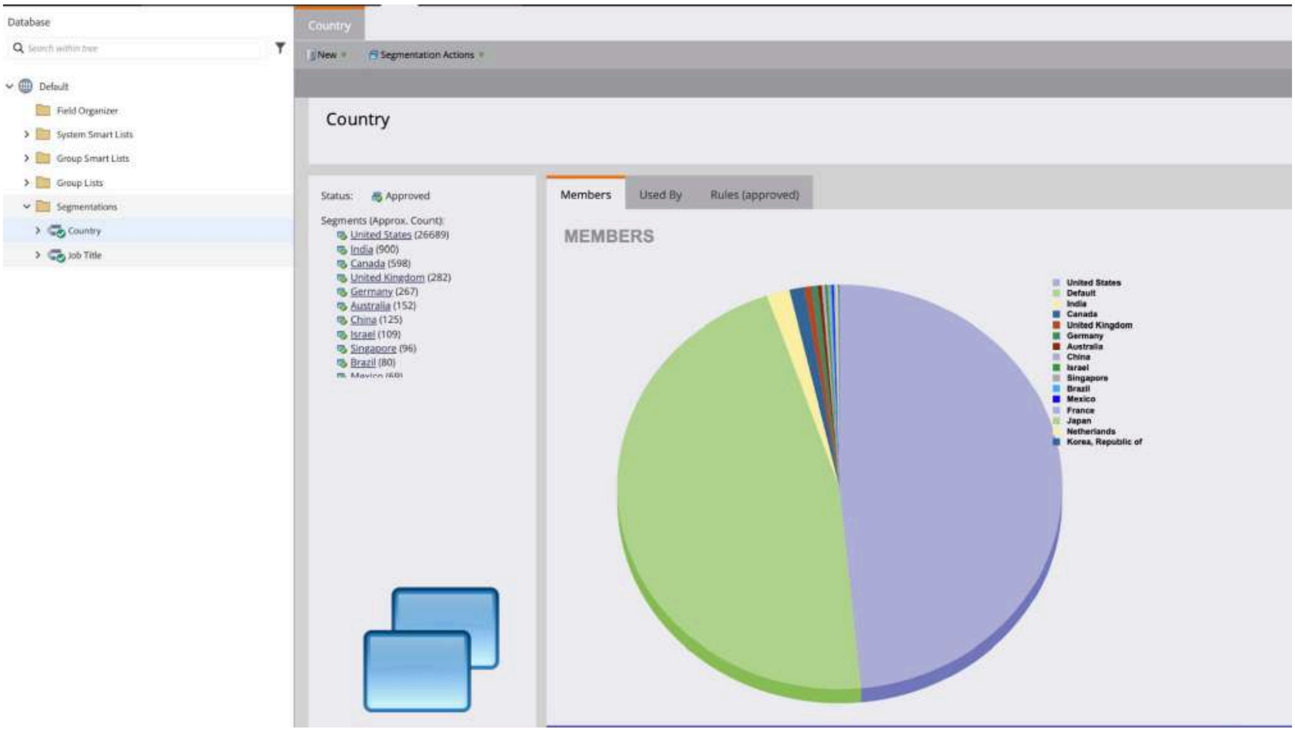
- All People → all people in your Marketo database. It is often used as a starting point for building other smart lists and segmentation.
- Unsubscribed People → includes people who have unsubscribed from your email communications.
- Marketing Suspended → who have been suspended from your marketing communications. The impact of this list is that it helps you maintain a good sender reputation and avoid being flagged as a spammer. By identifying and suspending people with a history of marking your emails as spam or having invalid email addresses, you can reduce the likelihood of your emails being marked as spam or blocked by ISPs.
- Blacklist→ includes people or domains that you have manually added to a blacklist.



Segmentation

Creating a segmentation in Marketo requires careful planning and execution, but it can lead to more effective and personalized marketing campaigns that drive better results. By following these steps, you can create targeted, relevant messaging that resonates with each segment in your database.The first step is to define your segmentation criteria. Before creating a segmentation in Marketo, you need to define the criteria that will be used to divide your audience into different segments. You can segment your audience based on attributes or behaviors like job title, industry, location, or website activity. Start by determining the most relevant criteria to your business and marketing goals.

- Once you have defined your segmentation criteria, navigate to the **Database** tab. Click **Segmentation** in the left-hand navigation menu to access the segmentation page.
- To create a new segmentation in Marketo, click the **New** at the top of the page. This will open a new window where you can define the details of your segmentation.
- In the **Segmentation Details** section of the new window, enter a name for your segmentation in the Segmentation Name field. This descriptive name should reflect the criteria used to define your segment.

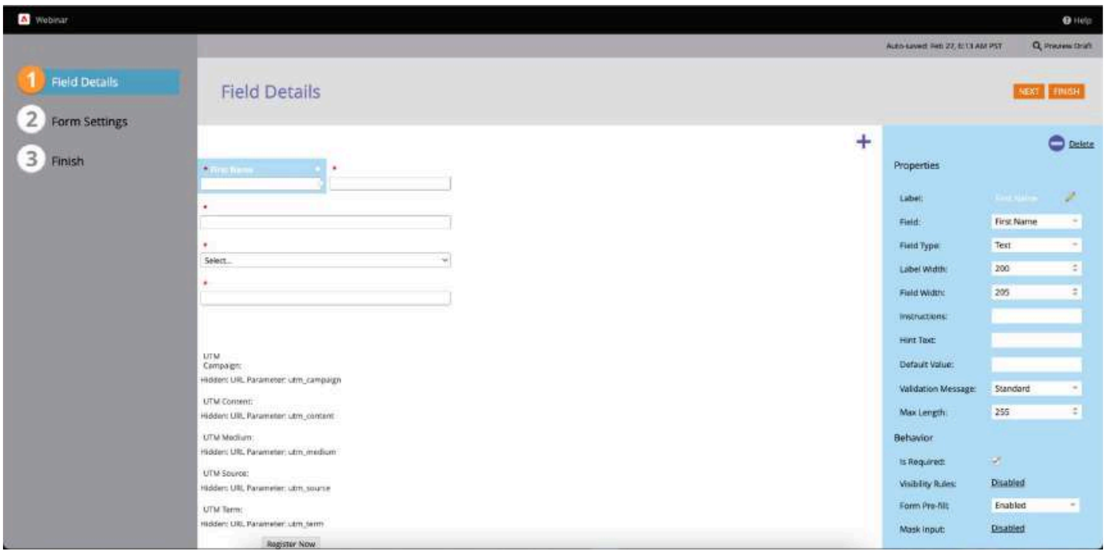


Design Studio

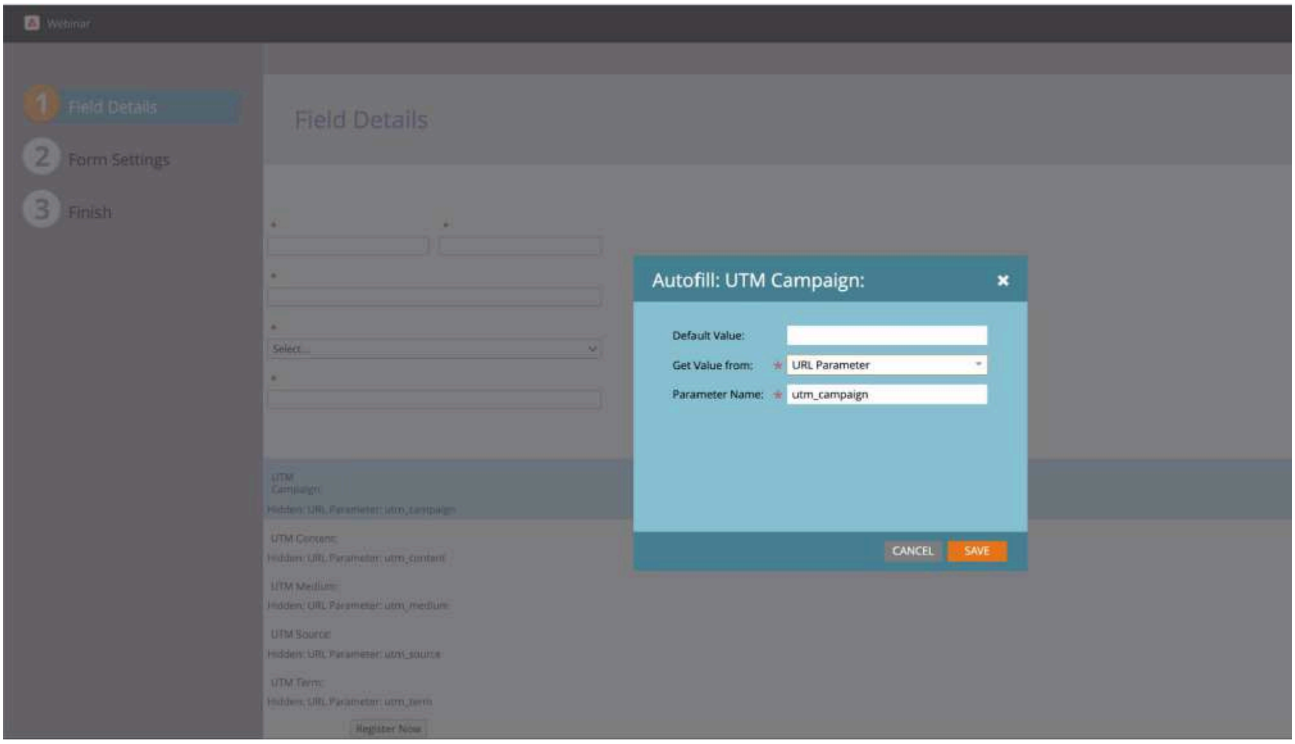
Creating Global Form

Designing a global form in Marketo allows you to create a standardized form that can be used across multiple pages or campaigns. Here are the steps to design a global form in Marketo:

- Log in to your Marketo instance and navigate to the **Design Studio** tab.
- Click the **New** button in the upper right-hand corner of the window and select **Form** from the dropdown menu. This will open a new window where you can define the details of your form.

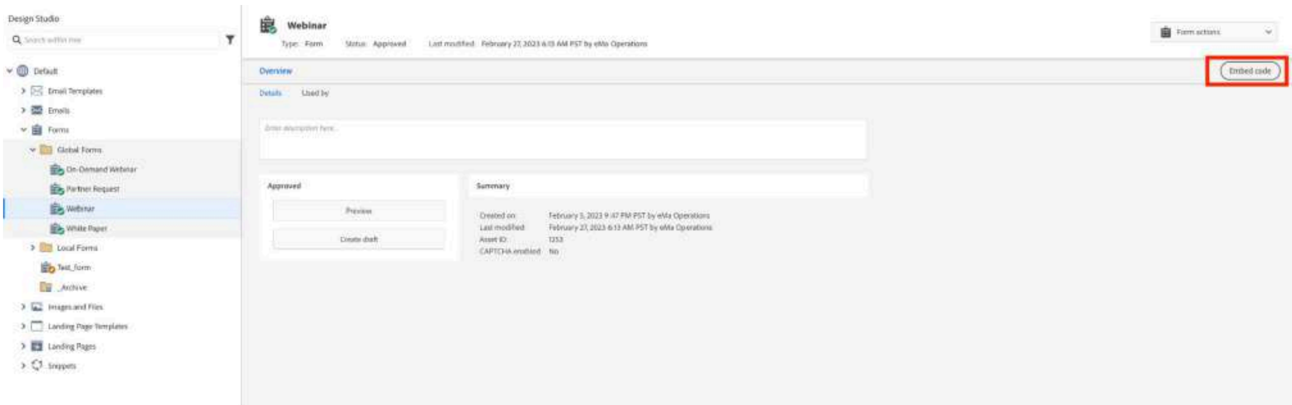


It is best practice to use one form for all webinars by add UTM parameters as hidden fields. After adding UTM fields, map them to URL parameter so Marketo can auto-populate these fields based on URL.



- Once done, click on **Finish** to complete the form.
- After the form is complete and approved, there are two ways of publishing it:

    - If you want to add the form on your non-marketo landing page, provide the embed code to the developer for your marketo form. Click on **Embed code** in the top right side of screen to extract the code.



- Once you have added your global form to a landing page, you can add the landing page to a program or campaign. This will allow you to track form submissions and capture lead data in your Marketo database.

- Before launching your global form, test it to ensure it works correctly and captures the data you need. You can test your form by filling it out and submitting it yourself or using Marketo's testing and validation tools.

Overall, designing a global form in Marketo requires careful planning and execution, but it can lead to a more efficient and streamlined form creation process. By following these steps, you can create a standardized form that can be used across multiple pages or campaigns while still being customized to fit your needs.

Analytics

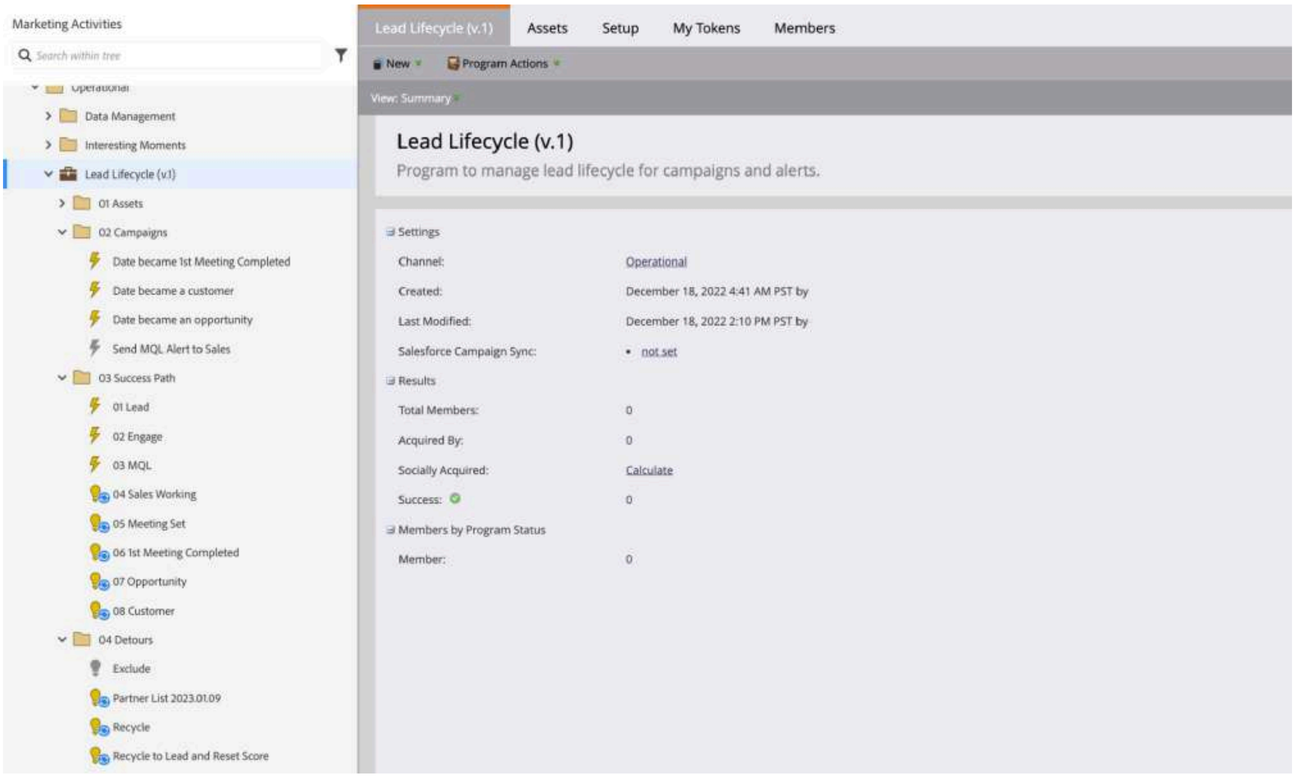
Revenue Cycle Modeler

To create a successful revenue cycle model in Marketo, it's important to establish the key stages of your sales process, such as lead generation, qualification, opportunity creation, and deal closure. Defining criteria for moving leads from one stage to the next, such as lead scoring, nurturing, and sales interactions, is also crucial.

Once the revenue cycle is defined, create stages by adding a name, description, and custom rules such as scoring and qualification criteria. Additional data can be captured through custom fields and tags. Transitions between stages can be created by defining specific criteria, like filling out a form or having a sales conversation.

After creating the model, activate it by clicking the **Activate** button. This enables using the model in Marketo campaigns. The model's stages can be used for audience segmentation and personalizing messaging based on leads' revenue cycle stages. Transitions can trigger automated workflows and targeted emails based on lead behavior.

By following these steps and customizing the model to fit business needs, the Revenue Cycle Modeler in Marketo can improve lead generation, nurturing, and sales engagement, ultimately driving more revenue.



Experience the Full Power of Marketo with a Custom Implementation Plan

Setting up a Marketo instance involves several critical steps that require careful consideration and planning. From defining your business requirements to creating a customized instance, integrating with other systems, optimizing campaigns, and analyzing data, each step is crucial to achieving success with Marketo.

Ready to harness the full power of Marketo for your business? Contact us today to get started with a customized implementation plan that meets your unique needs and drives results. Our team of experienced professionals is here to guide you every step of the way and ensure that you achieve success with Marketo. Don't wait - let's get started today!