

# Marketo Engage Assessment

## Do You Have the Feeling Your Marketo Engage Instance Needs a Tune-up or Maybe Even a Complete Overhaul?

After years of usage and multiple admins, you absolutely need to know what's in use, what's working, and what's needed moving forward for the continued success of your Marketo instance.

Let BDO Digital's award-winning team of Marketo certified experts conduct either a basic or full assessment of your Marketo instance, providing you with a full report of our findings and next steps to help get your marketing automation system back on track.

### Two Assessment Levels To Meet Your Needs

BDO Digital offers two Marketo Assessment options, depending on your license options, usage, and needs.

#### Basic Assessment:



**System Administration:** We start off by reviewing core components such as your email and landing page configurations for both branding and deliverability. Then, we'll review your default system settings and provide recommendations for configuration updates. We will also inventory active and inactive users and roles to bring access up to date.



**Database Management:** We will audit system data quality and field completeness, including your lead source field values to confirm data consistency. We will also estimate your level of duplicate records, review your SmartList usage for segmentation, and make recommendations for data normalization and enrichment opportunities.



**Salesforce Integration:** We'll inventory the field mappings, audit the usage of Marketo Sales Insight, and make best practice recommendations for better use of Marketo Interesting Moments and campaign attribution.



**Programs:** We'll review and inventory program channels, tags, statuses, and success measures. We will also review program structure for optimal reporting, evaluate program integrations with CRM campaigns, identify active programs, and make recommendations for archiving. Additionally, we will assess current naming conventions, program hierarchy, and your archiving process.



**Campaign Assets and Templates:** In this area, we will review and inventory your email, landing page, and form templates along with validating email, landing page, and form template responsiveness to ensure maximum deliverability and readability on various devices.



**Get a thorough review of your Marketo Engage Instance**

## Advanced Assessment:

Need a deeper dive? Our advanced Marketo Assessment includes everything above PLUS the following:



**Subscription Management, Privacy, and Deliverability:** Privacy and compliance are now an essential duty of marketing, so we'll assess how you're approaching subscription management, field usage, logic, and programs. We will review opt-in approach and privacy (GDPR, CASL) guidelines. And if you are wondering if your emails are making it to inbox, we'll generate a domain IP Blacklist check report.



**Lead Management:** We'll review and inventory your lead management stages and the various entry and exit criteria. We'll also review your lifecycle programs and identify areas of improvement, including analyzing your lead scoring, routing, and nurturing programs to ensure you're getting value from these powerful capabilities that all too often are in "set-it-and-forget-it-mode."



**Reporting and Attribution:** Marketing is responsible for driving revenue and yet, proper campaign attribution is a challenge for most. Given that, we'll review your campaign attribution strategy, audit your CRM campaign setup and tracking fields, and assess your usage of Revenue Explorer to help you once and for all tie marketing's investments to outcomes.

## Why BDO Digital?

BDO Digital Demand Generation Group guides and empowers marketing leaders along every step of their digital marketing journey, working side by side with their teams to help them take advantage of the best available marketing technologies. Our team of talented, passionate experts delivers the tools, knowledge, and support companies need to drive demand, achieve operational excellence, and elevate marketing's impact in their organization.

## When Should You Get an Assessment?

- **When** your Marketo Admin leaves or a new one is hired.
- **When** you've had Marketo implemented for more than a year.
- **When** you sense things are not running as they used to, especially your integrations, such as your CRM.
- **When** your lead management processes are outdated, and you need to revamp the operational programs to support a new strategy.
- **When** you've acquired a company that uses Marketo and need to consolidate instances.

For more info, contact us at [BDO.com/digital](https://www.bdo.com/digital)

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