



How to Avoid these Common Marketo Engage Template Implementation Issues



As a marketing professional, you're likely overwhelmed with so many tasks on your plate and with every passing day those tasks start building up. Maybe you've implemented the latest marketing automation tools to help with your digital marketing tasks, but are increasing the speed of your work?

Marketo Engage, one of the leading digital marketing tools, makes it easier address the challenges of an increasing workload and has enabled its users to implement templates to help streamline marketing efforts. Marketo Engage program templates are fully built programs with placeholders for elements like text and media.

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Chapter 1: What are Marketo Engage Templates?

Marketo Engage templates help enterprise marketers significantly save time and improve brand consistency. Moreover, with Marketo Engage templates, you can make the most of all the benefits that Marketo Engage marketing automation offers. But, Marketo Engage templates can provide a holistic strategy only with tokens and clear folder hierarchies. Thus, due to a lack of bandwidth or changing business needs, marketing operations teams often do not leverage Marketo Engage templates to their fullest potential. To make the most of Marketo Engage templates and scale enterprise marketing efforts properly, you need to gather insights beyond email and landing page asset templates. Remember, asset templates can accelerate individual email builds, but program templates will help you streamline your entire campaign operations. Using asset templates and program templates can further reduce Marketo Engage campaign execution time and effort.



Chapter 2: Benefits of using Marketo Engage Templates

Marketing Automation and technological innovation have entirely revolutionized marketers' ability to track and scale digital campaigns by centralizing reporting across multiple touchpoints. Besides enabling you to keep a tab on all the captured information and buyer personas, Marketo Engage also aids in filling out landing page forms. This will help you adjust your future campaigns and automatically create separate programs for your campaigns. With such adjustments, marketers can easily find the needed programs and know where to look when required. Marketo Engage Programs contain all the components required by a single marketing initiative, such as smart campaigns, local assets, reporting, and more.

Program templates make your Marketo Engage campaigns easier in the long run with increased efficiency and accuracy. It provides consistency in delivering results while also sustaining it by enabling flexible marketing operations. With program templates, you do not have to keep rebuilding programs like webinars, events, emails, blogs, and online advertising.

Thus, if you plan to build a complex campaign involving multiple streams and nested programs, all you need to do is clone the program template and make campaign-specific edits. Marketo Engage programs can be easily cloned and are very flexible for any marketing purpose. They are capable of housing marketing automation tasks to save time, but only if you know how to organize every Marketo Engage asset into programs. Based on the past or current membership in another program, you can have your programs feed into each other by building lists. You can also easily set up operational programs to update fields in your CRM or manage lead scores.

Standardized templates and tokens help the recipients in recognizing emails coming from a single organization, makes it easier to manage changes, and allow users to create emails easily. It also ensures that the emails render well. A straightforward way to help users find out where the programs should be cloned from, save the program as a template in its folder, named Program Templates.

Marketo Engage offers multiple modules for headers, body elements, and footers to allow the marketers to select the most relevant components at the time of use. But remember, once you have started building a campaign, you cannot change the program type. Thus, you need to plan and decide which of the four program types you want: event programs, default programs, engagement programs, and email programs. If you are going to offer extra functionality for online and live events, go with event programs. If you are looking for a mix of local assets like landing pages, emails, smart lists, reports, and smart campaigns, default programs are what you need. Engagement programs make ongoing drip nurture easy to manage, while email programs offer dashboards for streamlined A/B testing functionality and email-level interaction data.



No matter how well you build your Marketo Engage templates, the tokens play a dynamic role in customizing your templates. These are replaceable variables within program and asset templates and are used for recipient names, webinar titles, email footers, and more. Tokens help you save time by working with your templates. You will need to put all the assets within your program into a consolidated list and start creating tokens inside your program. Review your emails, images, and landing pages to find the elements you can transform into tokens. This will give you a master list for your programs. Once you create your tokens, populate your program assets and open your emails and landing pages to insert the tokens wherever the dynamic images and text are displayed.

Tokens can improve the scalability of your Marketo Engage templates significantly. And with the right token program strategy in place, you will be able to modify content in one place as the updates are applied instantly throughout an entire program. If you are planning to start implementing Marketo Engage templates or just want to troubleshoot your existing setup, here are a few things that you need to create enterprise-level Marketo Engage templates.

Chapter 3: How to create enterprise-level Marketo Engage templates

Every organization has specific marketing needs, and it is challenging to develop an all-encompassing template strategy to meet all these needs. It is essential to design organized Marketo Engage templates with a clear hierarchy to maximize their efficiency and to achieve scalability. Ensure that it can be easily updated and adapted for individual campaigns and flexible enough not to restrict the changing needs of the marketers.

To make the most of Marketo Engage templates, you need to understand which programs can benefit from templating and which elements need to be modified according to campaigns. Since end-users typically want programs like newsletters, nurture drips, webinars, or events templated, you need to focus on recurring campaigns. Some end-users only change the title, description, color, and speaker list for a new webinar campaign, while some end-users need to switch up the elements for each event. Thus, you should understand which elements need to be modifiable. Make sure you document each program template you plan to create and the elements included in each asset.

Once you understand the internal marketing needs, you need to apply those in the naming convention and token strategy. If you maintain the Marketo Engage template hierarchy, the elements below will automatically inherit characteristics from those above. Establish a program naming convention to find what you are looking for easily. Your naming convention gets cloned right when you clone your program template. Thus, it is vital to get it right from the start.



Here is a checklist that you can follow before building your program naming convention:

- Include a date element based on the create date or launch date in your naming convention.
- Create abbreviations for each asset type and program you are templating. For example, Newsletters could be NL, and Emails can be EM.
- Make your naming convention simple enough for all Marketo Engage users to remember easily.
- Leave slots for the program ID, campaign name, and program description.

After you are done with the naming convention, you need to build the token strategy. The values of global tokens are inherited by all programs below it in the hierarchy. Global tokens are placeholders for consistent elements across multiple program types, but the elements of local tokens vary from program to program and may not apply to all. Therefore, you can use Marketo Engage My Tokens to create placeholders for any program element. You can also create "Universal Tokens" in the very top folder of your hierarchy.

For the templates and tokens to work properly, you need to add some assets and related operational campaigns. After selecting the right program type depending on your marketing program's level of complexity, you can nest them within a default program. There are four different program types to choose from:



1- Event Programs: If you are planning to organize webinars or in-person events, the event program is what you need as it is designed to help track functions such as invitations and registrations.

2- Engagement Programs: if your objective is to track metrics across emails, an engagement program is best. It sends out emails at a set cadence for drip nurture.

3- Email Programs: Email Programs can be nested into another program and conduct operations similar to A/B testing and single-send blasts.

4- Default Programs: These adaptable and flexible programs are not preferred by many as they lack some critical built-in features.

With your program in place, your Marketo Engage template is ready. But you do not want to send them out before testing. Ensure everything is in place and your program is performing as intended. Here is a list of things that you need to check for in each program template:



- If the design of all asset templates is consistent with your brand guidelines.
- Ensure your program statuses support the goal of the program.
- Make sure your naming convention is used consistently.
- Ensure your token strategy is implemented appropriately.
- Test your emails across all popular email clients (Gmail, Outlook, Apple Mail, etc...)
- Test the landing pages across all popular browsers.
- Ensure the automation operates as intended by running a function test from beginning to end.
- Finally, ask for a review and sign-off from your peers.

Document the process for using your program templates and provide training to your end-users to ensure that the templates are used consistently and correctly. With all the complexity that Marketo Engage provides, the end-users can easily get confused without proper training. Remember to make the most of Marketo Engage templates, you should know how to use and implement them in the best way.

Chapter 4: Common Marketo Engage template implementation issues and solutions

As discussed earlier, marketers often do not leverage Marketo Engage templates to their fullest potential, primarily because of some of the common mistakes marketers make. To help you defect such issues, we have prepared a list of questions you need to ask yourself.

Are you only using asset templates and no program templates?

Ignoring program templates is one of the most common mistakes made by marketers as such templates are less resource-intensive to create email templates. Only leveraging asset templates will not give you the full value that Marketo Engage provides. Well-designed program templates are time-saving as they eliminate the vast majority of the manual work required to execute a campaign in Marketo Engage. If you want to launch future programs in a fraction of the time, you need to build program templates and use them the right way.

Are you making edits to master Marketo Engage templates?

Modifying your master Marketo Engage templates instead of cloning them first can take a long time to diagnose and correct broken components. Instead, adopt a centralized marketing model that will provide access to all users who are not Marketo Engage experts and ask your marketing operations team to execute campaign requests. You can also use Marketo Engage Workspaces to set up a workspace that can be cloned to other Workspaces that are only meant to house master templates. Make sure that all asset templates are shared across all Workspaces. If you want marketers to create campaigns at their own pace while protecting your master templates' integrity, use specific software that allows you to create a campaign request intake form that maps to the tokens in your program templates. This will result in automatic campaign generation inside Marketo Engage.

Are you avoiding program-level tokens?

Program-level tokens are an essential tool for streamlining campaign operations as the changes you make are automatically applied across all assets within the program. Using a robust set of program templates that employ program-level tokens creates operational efficiency. Make sure that you leverage program-level tokens.

Are you avoiding universal tokens?

Universal tokens are significant as they are simple, functional, and make your life easy while refreshing your Marketo Engage templates. Whether you plan to rebrand or update your business address, if you are not using universal tokens, you will need to develop a whole new set of templates or modify each of your existing templates one by one. With a universal token, the user needs to update one place, and the change will propagate across all assets containing the token. Thus, to make the most of Marketo Engage with consistent content that may require time-sensitive changes, include universal tokens in your program template strategy.

Do you have too many Marketo Engage templates?

As your business grows, the number of templates you use also starts increasing. This may lead to users struggling to determine which templates to use, are up to date, or are broken. Too many Marketo Engage templates defeat the purpose of having templates to build consistency, quality, efficiency, and time savings. Instead, you can reduce the total number of templates in circulation and make a standardized list of templates. Also, don't forget to follow asset template best practices like modifying editable template fields from the web interface, controlling the basic text styling, like font style and size, changing images within the template, or merging multiple template files to create a multi-page artifact. and create modular asset templates featuring modules that can be kept or deleted.



Are you able to use templates autonomously?

Marketo Engage templates aim to enable non-expert users to clone and modify them for individual campaigns easily. But often, marketing operations are not trained to use the templates, making managing campaign development and experimenting difficult. Thus, make sure you provide training and documentation on template use, such as creating a program launch QA checklist for end-users. This will make sure that even commonly forgotten elements are updated as required. Moreover, most marketing work management tools like Search engine optimization (SEO), Social media marketing (SMM), Press releases (PR), and Commercial advertising available in the market allow you to customize intake forms where the fields correspond to the tokens that need to be updated.

Chapter 5: Conclusion

The Marketo Engage marketing automation tool has a plethora of abilities to speed up your digital marketing process and reach your objectives faster. Implementing Marketo Engage templates, however, will make your digital marketing platform more efficient. Marketo Engage templates aim to reduce the repetitive aspects of campaign creation. The more you automate your marketing campaigns, the more time marketers reclaim for the many other tasks on their plates. This will help you boost all your digital marketing strategies even without help from a Marketo Engage admin.





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