

Company Surge[®] for Marketo

Activating Company Surge[®]
for Sales and Marketing



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Getting started

Introduction

Now that you have integrated Company Surge® for Marketo and have set up your instance with the foundational steps outlined in the *Bombora Getting Starting guide*, you're ready to activate the data across your marketing programs.

There are many ways to get value from your Company Surge® data. This activation guide will provide a few common use cases for a B2B marketer working at an example web conferencing company.

Example company details:

- Sells ABM software
- Key buyers are Director levels and above from the marketing and sales departments at their target companies
- Has account-based alignment with the sales team
- Manages both email marketing and digital advertising campaigns
- Has Bombora Company Surge®

What is Company Surge® data?

Derived from Intent data, Company Surge® data indicates when a business starts consuming content on a B2B topic much more than they normally do, according to historical data and benchmarks. It identifies when businesses are actively researching products or services signaling purchase intent.

If you need help setting up your Marketo workflows, please contact your Bombora Account Manager.

Use cases

Please note that in all these use cases, it assumes that you have followed all the steps from the *Getting Started guide* including, building a Smart List for each cluster, a segmentation program, and a cluster count custom field in Salesforce and Marketo.

1 Building an email nurture program.

Email nurture programs are core to Marketo and essential for generating MQLs. With the knowledge that a target company is showing intent on your relevant cluster(s), you can further segment your emails by Marketing and IT departments for more targeted messaging. If there is no response from the prospect after several emails, sales can follow up with an email or call.

2 Creating an engagement nurture campaign.

Engagement nurture programs are beneficial for accomplishing complex nurturing with ease, where people can be added to different stages of the campaign based on a set of criteria. Marketers are often interested in reaching prospects that are not only showing intent on one cluster, but several clusters which is a very strong indicator of intent. Creating an engagement nurture campaign would allow you to set cluster thresholds as the criteria for people being added to different parts of the stream (i.e. early, mid, late).

3 Creating a sales task for high value leads.

When a target company is showing intent across a multiple clusters, you may want to have the appropriate sales rep call that lead immediately and bypass your nurture program. One way to alert your sales team of this opportunity is to create a sales task in Salesforce for lead follow up.

4 Leveraging Company Surge[®] for digital advertising.

Using Marketo's LaunchPoint service to extend your reach of target prospects or orchestrate account-based initiatives is an effective way to use Company Surge[®] data. This can help create a more holistic marketing campaign that engages prospects across channels they use like LinkedIn, Facebook, and Google. Please note you must add the channel partner you wish to use (e.g. LinkedIn) to your instance as a LaunchPoint service. For step-by-step directions, refer to Marketo documents [here](#).

Building an email nurture campaign

In this email nurture campaign, the example company uses Company Surge® to drive engagement with those actively researching account-based marketing (ABM) solutions and not actively engaged with the sales team. While the company sells multiple products to a variety of roles, the campaign is solely focused on people that work in marketing or sales, the departments that compose the buying center for this solution. Each department has unique value drivers, so this campaign sends different emails to IT and Marketing.

The flow of the campaign:

- **Entry:** Entry occurs when a person is identified as showing intent on “ABM” is in marketing, and is not engaged with the sales team
- **Email 1:** The campaign sends an email with an offer and then waits 3 days for a response. If the asset is downloaded, sales is tasked to call if the person is director level or above
- **Email 2:** If asset is not downloaded, an alternate offer is sent. If the asset is downloaded, sales is tasked to call if the person is director level or above
- **Email 3:** After 4 additional days, the person has not downloaded any asset, the person receives a text only email on behalf of the sales rep. After 2 days, if the person has not responded, the sales rep is tasked to call the person if the person is director level or above

Step 1 - Building an email nurture program

- 1.1** Go to **Marketing Activities**, select the folder you want to create the nurture program in, select **New** and **New Program**.
(Figure 1.0)

Fill in:

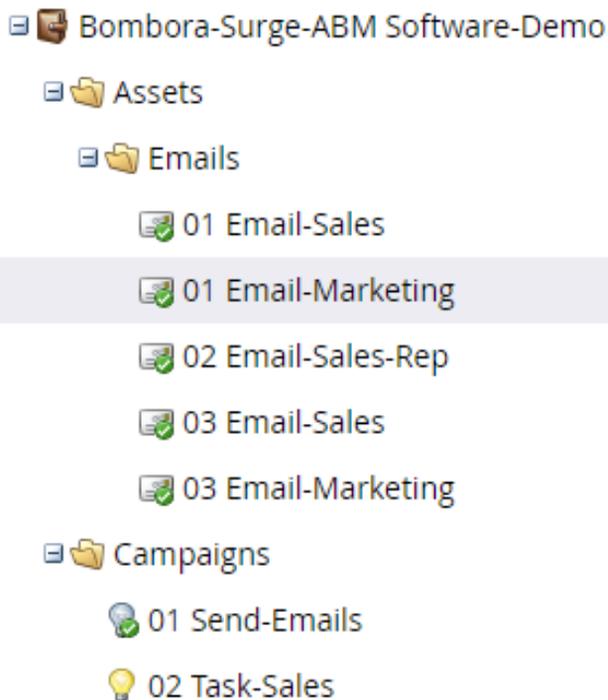
Program Name: (i.e. Bombora-Surge-ABM Software)
Program Type: Default
Channel: Email Nurture

- 1.2** Create a series of emails for each department as part of your nurture flow (i.e. Marketing, IT).

For this example we created:

- 2 branded emails for Marketing
- 2 branded emails for Sales
- 1 text only email sent on the behalf of a sales rep

Figure 1.0



Step 1 - Building an email nurture campaign (cont'd)

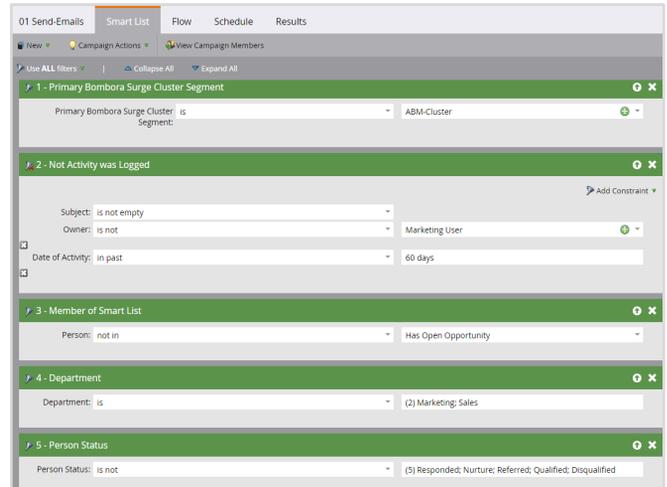
- 1.3 Create a batch Smart Campaign to start the email flow when a Marketo person meets the qualification criteria.

Navigate to **New** and select **New Smart Campaign**. Fill in a name (i.e. Send Email) and click **Create**.

1.4 Define your Smart List. (Figure 1.1)

- Primary Bombora Surge Cluster Segment is ABM-cluster
- Not Activity was Logged in past 60 days
This is in place to ensure any person that sales has interacted with in the last 60 days is excluded
- Member of Smart List Has No Open Opportunities
This is in place to ensure contacts related to in-pipeline opportunities are not engaged
- Department is Sales or Marketing
For the product this example company is selling the buying center is solely people in marketing and sales, so we only want to engage those departments
- Person Status is NOT Responded, not qualified, etc.
Specific person statuses are excluded to ensure that people currently engaged by the sales team are not included in this nurture

Figure 1.1



Step 1 - Building an email nurture campaign (cont'd)

1.5 Determine the email send flow. Here's an example (Figure 1.2):

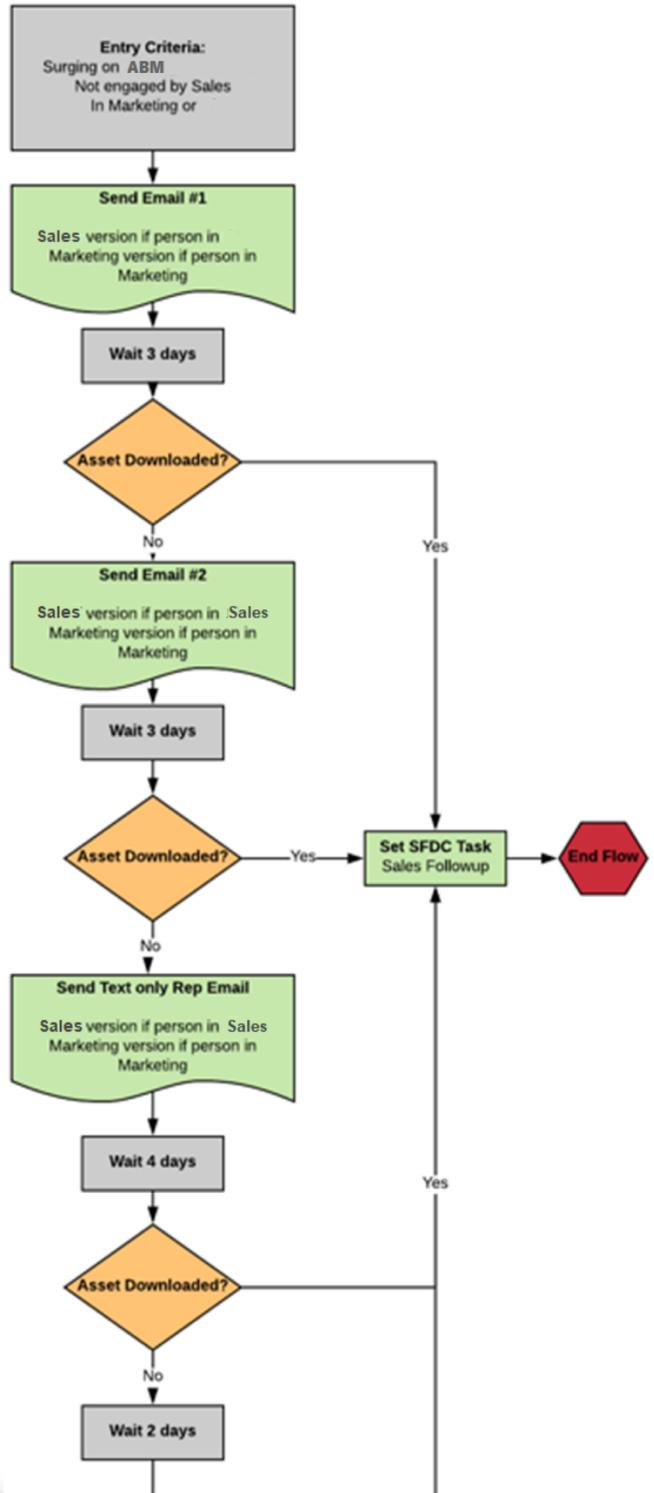
- Change Program Status
- Add to SFDC Campaign and send two versions of the email
 - #1 if department is "Sales" and #2 if "Marketing"
- Wait 3 days
- Send email #2 if not "Responded"
- Wait 4 days
- Send email #3 if not "Responded"
- Wait 2 days
- If not "Responded," create a Salesforce task for sales to call the person only if s/he is director level or above

1.6 Schedule the campaign.

Click on **Schedule**.

Qualification: Once
Recurrence: Weekly (i.e. every Tuesday)

Figure 1.2



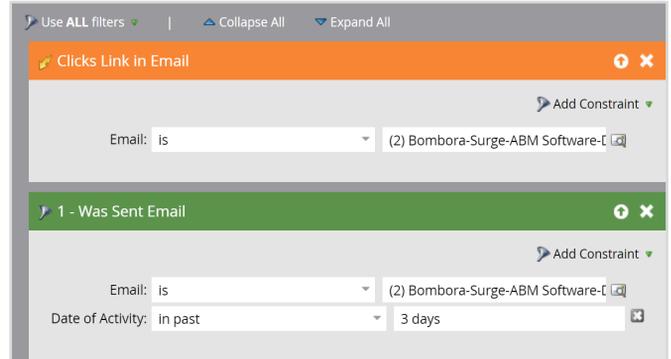
Step 1 - Building an email nurture campaign (cont'd)

- 1.7 Create a trigger Smart Campaign to create a task for sales in Salesforce if the person engages with an email. Navigate to **New** and select **New Smart Campaign**. Fill in a name (i.e. Task Sales) and click **Create**.

Define your Smart List.

Add the following two filters:

- Click action links in email
- Was sent an email in the last 3 days
In both, restrict them to the emails sent in steps above



The screenshot shows two filter rows in a Smart Campaign interface. The first row is titled "Clicks Link in Email" and has a filter for "Email: is" with a value of "(2) Bombora-Surge-ABM Software-". The second row is titled "1 - Was Sent Email" and has two filters: "Email: is" with the same value, and "Date of Activity: In past" with a value of "3 days".

Create your flow.

Click on **Flow**.

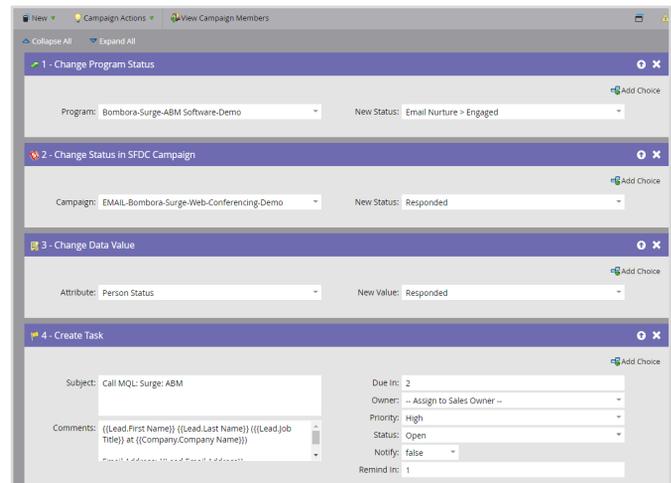
- Change Program Status to Engaged
- Change SFDC Campaign Membership
- Update Person Status = 'Responded'
- Create SFDC Task for sales to follow up with MQL

Schedule Trigger Smart Campaign

Click on **Schedule**.

Qualification: Once

Click **Activate**.



The screenshot shows four action steps in a Smart Campaign flow. Step 1: "Change Program Status" with Program set to "Bombora-Surge-ABM Software-Demo" and New Status set to "Email Nurture > Engaged". Step 2: "Change Status in SFDC Campaign" with Campaign set to "EMAIL-Bombora-Surge-Web-Conferencing-Demo" and New Status set to "Responded". Step 3: "Change Data Value" with Attribute set to "Person Status" and New Value set to "Responded". Step 4: "Create Task" with Subject "Call MQL: Surge: ABM", Due In: 2, Owner: "Assign to Sales Owner", Priority: High, Status: Open, Notify: false, and Remind In: 1.

Step 2 - Creating an engagement nurture program

- 2.1** Navigate to **Marketing Activities**, select the folder you want to create the nurture program in, select **New** and **New Program**.
Fill in:

Program Name: (i.e. EN-Bombora Surge 2 Cluster)

Program Type: Engagement

Channel: Email Nurture

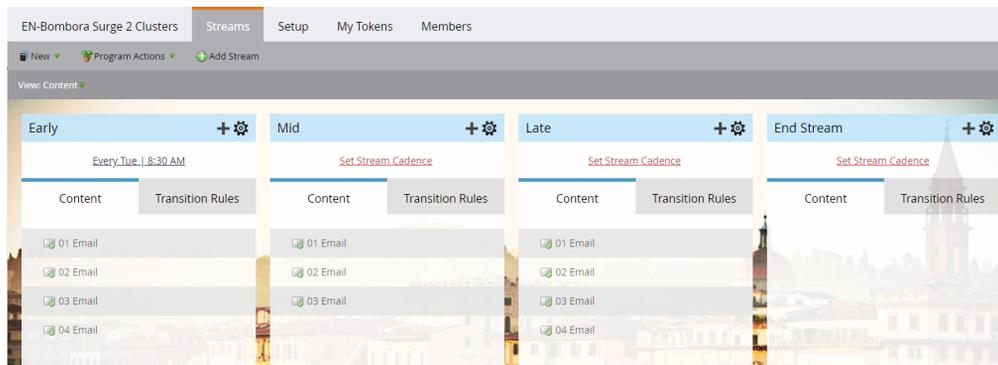
NOTE: It's a best practice to also create a related Salesforce campaign to track results.

- 2.2** **Create streams.**

Click on the **Stream** tab and **+Add Stream**.

In our example, we made four streams: early middle, late and end.

NOTE: Repeat for however many streams you will be creating.



- 2.3** Create a series of emails for each part of your nurture stream that is relevant to how you will be adding people into each stream.

- 2.4** Click on **Set Stream Cadence** in each stream and determine when it should be sent (i.e. Tuesday at 8:30 AM)

- 2.5** Create an **Add to Nurture** Smart Campaign.

Right click on **EN-Bombora Surge 2 Clusters** and create a new Smart Campaign. Name it **Add to Nurture**.

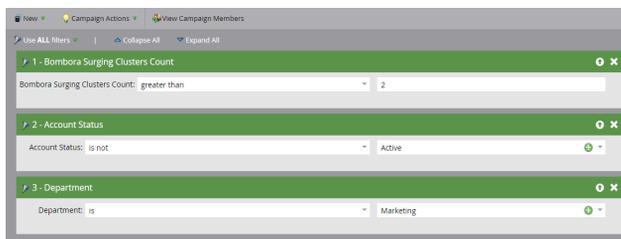
Step 2 - Creating an engagement nurture program (cont'd)

2.6 Define your Smart List

Add the following filters into your Smart List:

- Bombora Surging Cluster Count greater than 2
- Account Status is not Active
- Department is i.e. Marketing

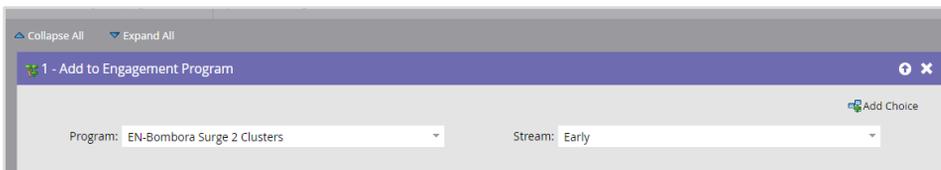
In this example, we specify that account status is not active as we do not want people placed in this nurture if, they are a member of an existing customer or active account. In addition, the department is specified as marketing as the content in this nurture is specific to the needs and interests of those in marketing.



2.7 Click on Flow.

Drag **Add to Engagement Program**.

- Program: EN-Bombora Surge 2 Cluster
- Stream: Early



2.8 Click on **Schedule** and then “schedule reoccurrence” and select **Run Daily**.

2.9 Create a **Remove from Nurture** Smart Campaign to remove people from the campaign once the person’s account becomes active.

Right click on the program EN-Bombora Surge 2 Topics and create a new Smart Campaign. Name it **Remove from Nurture**.

Click on **Smart List** and drag **Member of Engagement Program** and **Account Status**.

Step 2 - Creating an engagement nurture program (cont'd)

2.10 Define your Smart List

- Member of Engagement Program: True
- Program is EN-Bombora Surge 2 Clusters
- Stream is Early; Mid; Late
- Account Status is Active

Remove from Nurture | **Smart List** | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

1 - Member of Engagement Program

Member of Engagement Program: true

Program: is EN-Bombora Surge 2 Clusters

Stream: is (3) Early; Mid; Late

2 - Account Status

Account Status: is Active

2.11 Click on Flow.

Drag Change Engagement Program Stream.

- Program: EN-Bombora Surge 2 Clusters
- New Stream: End Stream

Remove from Nurture | Smart List | **Flow** | Schedule | Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Change Engagement Program Stream

Program: EN-Bombora Surge 2 Clusters

New Stream: End Stream

2.12 Click on Schedule and then “schedule reoccurrence” and select Run Daily.

Step 3 - Creating a sales task for high value leads

3.1 Navigate to Marketing Activities, select New and New Campaign.

Select the appropriate folder and name the campaign (i.e. Task Sales 2+ Surging Clusters)

3.2 Create your Smart List. Under Triggers, select Data Value Changes.

Input the following information:

Attribute: Bombora Surging Cluster Count
New Value: At least 2
Previous Value: At most 1

*This makes it so that the flow will only initiate when a person first is associated to two clusters. The previous value of "at most 1" is specified so the person does not receive the flow an additional time if their points decrease *(e.g. 3 to 2 clusters)*

In this example, we wish to only have a Salesforce task sent to sales if the account status is not active and the person is in marketing, so these attributes are specified. The reason for this specificity is that Company Surge® clusters are appended to all people related to an account, so this ensures that only relevant people are sent to sales and not all people from every department.

The screenshot shows the 'Smart List' configuration interface for a campaign named 'Task Sales 2+ Surging Clusters'. The interface includes tabs for 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs are options for 'New', 'Campaign Actions', and 'View Campaign Members'. The main area displays a list of filters:

- Data Value Changes**: Attribute: Bombora Surging Topics Count, New Value: at least 2, Previous Value: at most 1.
- 1 - Account Status**: Account Status: is not Active.
- 2 - Department**: Department: is Marketing.

Step 3 - Creating a sales task for high value leads

3.3 Click on the **Flow** tab.

Under Salesforce, select **Create Task**.

Input a subject line that will get the attention of sales (i.e. **Hot MQLs!**).

In the comments field, provide details on how the person should be engaged by sales.

3.4 Click on the **Schedule** tab to schedule the trigger campaign.

Qualification: Every Time

Click **Activate**.

The screenshot shows the 'Create Task' dialog in Salesforce. The subject is 'HOT MQL | 2+ Surging Clusters'. The comments field contains the following merge fields: {{Lead.First Name}}, {{Lead.Last Name}}, and {{Lead.Job Title}} at {{Company.Company Name}}. The due date is 2, owner is 'Assign to Sales Owner', priority is High, status is Open, notify is true, and remind in is 1.

Subject:	HOT MQL 2+ Surging Clusters	Due In:	2
Comments:	{{Lead.First Name}} {{Lead.Last Name}} {{Lead.Job Title}} at {{Company.Company Name}}	Owner:	-- Assign to Sales Owner
		Priority:	High
		Status:	Open
		Notify:	true
		Remind In:	1

Step 4 - Leveraging Company Surge[®] for digital advertising

4.1 Navigate to your Cluster Smart List (i.e. Cluster - ABM)

Select the People tab.

4.2 Click the Ad Bridge icon at the bottom of the list. (Figure 1.3)

4.3 Select LinkedIn or a different channel partner and click Next. (Figure 1.4)

NOTE: If you have not already granted Marketo access to your LinkedIn account, it will redirect you to LinkedIn.

4.4 Select an existing LinkedIn audience to send your Smart List over to or click on +New Audience to create a new audience.

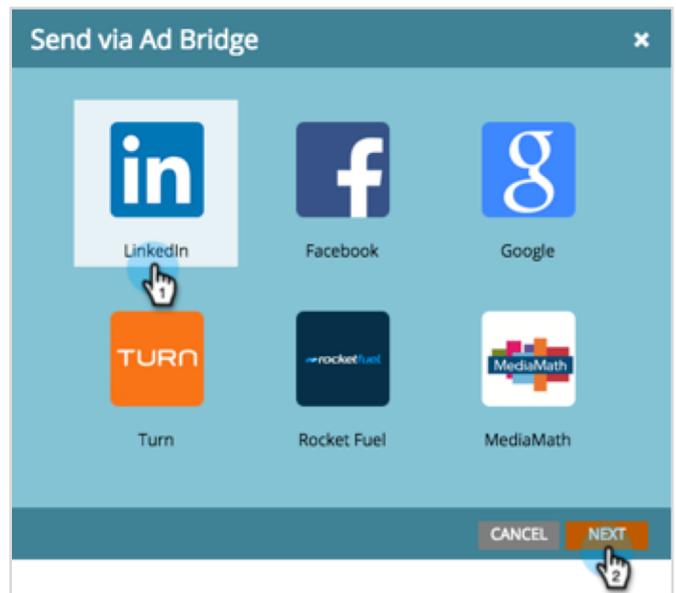
Select a Add Leads to Audience as your push type and click update.

4.5 Allow 15 minutes for the sync to complete for your Bombora Cluster Smart List to be pushed to your channel partner.

Figure 1.3

ID	Last	First	Job Title	Company	Email	Phone	Person Status	Person Source	Updated
2266	Loddy	Thomas	Exec Gen	adobe	tloddy@adobe.com		Open		Mar 30, 2019 1:53 PM
2267	Conly	Keith	Sr. Mgr - Mktg.	Next Gen	kconly@nextgen.com		Qualified		Mar 30, 2019 5:17 PM
2272	Owens	Megan		Intouch Solutions	megan.owens@intouch.com		Open		Mar 30, 2019 1:53 PM
2273	Viviana	Tricia	Media Supers.	Intouch Solutions	tricia.viviana@intouch.com		Qualified		Mar 30, 2019 5:17 PM
2303	Wells	Orion	Marketing Dir.	Ping Identity	orion.wells@pingidentity.com		Responded		Mar 30, 2019 2:53 PM
2305	Donipal	C	CEO	Ping Identity	cdonipal@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2302	Horton	Ben	Director of Sal.	Ping Identity	ben.horton@pingidentity.com		Open		Mar 30, 2019 1:58 PM
2324	Bahn	Brandon	Director of Sal.	Ping Identity	brandon.bahn@pingidentity.com		Open		Mar 30, 2019 1:58 PM
2326	Kull	Lagan	Vice President.	Ping Identity	lagan.kull@pingidentity.com		Responded		Mar 30, 2019 2:53 PM
2332	Haywick	Carin		Ping Identity	carin.haywick@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2333	Walt	Sarah		Ping Identity	sarah.walt@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2342	Wilmshie	Therese	Director of Sal.	Ping Identity	therese.wilmshie@pingidentity.com		Open		Mar 30, 2019 1:58 PM
2343	Gray	Ed		Ping Identity	ed.gray@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2344	Gonsaker	John	Marketing Dir.	Ping Identity	john.gonsaker@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2345	Dahl	Jessica	Marketing Dir.	Ping Identity	jessica.dahl@pingidentity.com		Qualified		Mar 30, 2019 1:53 PM
2346	McClure	Byron		Ping Identity	byron.mccclure@pingidentity.com		Open		Mar 30, 2019 1:53 PM
2347	Rames	Nic	CEO	Ping Identity	nic.rames@pingidentity.com		Open		Mar 30, 2019 1:58 PM
2347	Lee	Nick	Marketing Dir.	Ping Identity	nick.lee@pingidentity.com		Responded		Mar 30, 2019 2:53 PM
2348	Johnson	Jessica	Vice President.	Ping Identity	jessica.johnson@pingidentity.com		Qualified		Mar 30, 2019 1:53 PM
2356	Kunzmann	Wahneema	Vice President.	Juniper Networks Inc.	wahneema.kunzmann@juniper.net		Qualified		Mar 30, 2019 5:17 PM
2352	Conger	Brian	Director, Mktg.	Juniper Networks Inc.	brian.conger@juniper.net		Open		Mar 30, 2019 1:53 PM
2358	Gorski	Linda	Spoc of the C.	Juniper Networks Inc.	linda.gorski@juniper.net		Open		Mar 30, 2019 1:53 PM
2373	Peterson	Alex	Director of Sal.	Ping Identity	alex.peterson@pingidentity.com		Open		Mar 30, 2019 1:58 PM
2378	Beckel	Robert	Vice President.	Ping Identity	robert.beckel@pingidentity.com		Responded		Mar 30, 2019 2:53 PM
2381	Audi	Shirley	Sr Manager ?	Juniper Networks Inc.	shirley.audi@juniper.net		Open		Mar 30, 2019 1:53 PM
2381	Ludlow	Clare	Advertising O.	Sitel News	clare.ludlow@sitelnews.com		Open		Mar 30, 2019 1:53 PM
2388	Yee	Ming	Executive Vice.	Edman Digital	ming.yee@edman.com		Responded		Mar 30, 2019 2:53 PM
2330	Williamson	Frances	Director of Sal.	Edman Digital	frances.williamson@edman.com		Open		Mar 30, 2019 1:58 PM

Figure 1.4



Surf's up. Let's take off.

For technical support or questions, please contact us at support@bombora.com.

An aerial photograph of a beach, showing the dark green ocean water meeting the white foam of waves crashing onto a sandy shore. The image is partially obscured by a white, torn-paper-like border on the left side.

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