Company Surge®
for Marketo

Getting started guide

Marketo™
An Adobe Company

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Contents

Why use Company Surge® for Marketo?

What is Company Surge® for Marketo?

Company Surge® for Marketo is a bi-directional integration between Bombora and Marketo where, Company Surge® data is automatically appended to people in Marketo using a custom data object.

By using Company Surge® for Marketo, you can better segment your people in Marketo based on topic interest clusters for email nurture campaigns, optimize lead routing and scoring, prioritize accounts for sales, and orchestrate Account-Based Marketing activities.

Getting started

Company Surge® for Marketo arms you with the knowledge of which of your target businesses are demonstrating an increase in intent on what clusters and topic interests. While Bombora aggregates data on the company level, Company Surge® data is appended on the person level using a custom data object. This provides many benefits but requires some foundational work to make the data actionable for your marketing programs.

To get the most of your investment, follow these set-up recommendations.

Activate Company Surge® for Marketo

✓ More effective nurture campaigns

✓ Optimize lead routing and scoring

✓ Prioritize accounts for sales

✓ Orchestrate Account-Based Marketing programs

What is Company Surge® data?

Derived from Intent data, Company Surge® data indicates when a business starts consuming content on a B2B topic or groups of related topics 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 Customer Success Manager.

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Creating Smart Lists for topic clusters

Create a Smart List for each of your subscribed clusters. Creating these Smart Lists is required for building smart campaigns, programs, segmentations, nurture and engagement streams using Company Surge® data.

Getting started

Create a Smart List in **Database.** (Figure 1.0)

Note: Best practice to create a folder to store all Bombora Company Surge® Smart Lists.

Figure 1.0

1.1

Go to Smart List filters, and in the '**Person Attributes**' folder choose '**Has Bombora Surge**'.

Click on '**Add Constraint**'.

Select '**Cluster Name**' and choose the applicable cluster name (e.g. ABM-Cluster). (Figure 1.1)

Note: Repeat steps for creating a Smart List for each cluster name.
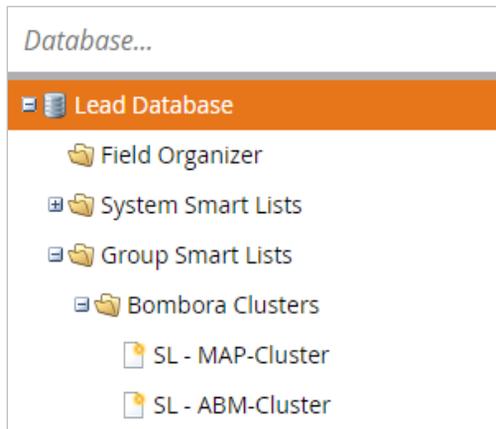
Figure 1.1
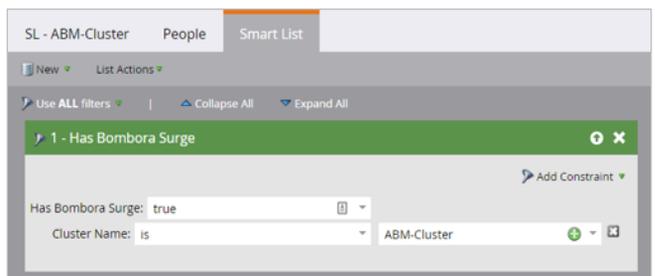
Smart Lists to consider creating

Below are Smart Lists driven by Company Surge® data frequently used by Marketo clients for consideration.

Smart List	Value
Target Addressable Market All people, whose accounts are spiking on one cluster or more, whose account is in your target addressable market.	Not all accounts that are spiking on your topic clusters are viable prospects. This smart list distills all of the contacts in your marketing database down to those that fit your firmographic criteria (right industry, size, etc.)
Wake the Dead All people with a currently spiking account that were previously disqualified or rejected by sales.	Company Surge® is an effective way to identify previously rejected or disqualified leads that should be re-engaged. This smart list can power a re-engagement program, which is based on their disqualifying or rejection code.
Existing Customer All existing customers that are spiking on your topic clusters.	Knowing that an account is showing interest on a particular cluster is valuable for sales and account management to know as it helps to uncover new sales opportunities and identify at risk accounts.
In Sales Follow-up All people currently being engaged by the sales/BDR who are spiking.	Leads currently being engaged by sales need to have a different treatment taking into consideration they are already being actively engaged by sales.
Last Call/email: 60D+ All people whose last call from your company was 60 or more days ago.	Company Surge® is an effective indicator of what topic(s) will resonate with a prospect. This Smart List can help provide guidance on people to call, and what topics sales should discuss with them.
MQL, no Sales Follow-up All people that showed interest, but did not receive sales follow-up	Company Surge® provides limited value if the sales team does not follow-up and engage its resulting MQLs. Use this Smart List as a governance report to ensure all MQLs are actively engaged.

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Creating a Smart List for Cluster Topics (optional)

Create a Smart List for individual cluster topics. Creating these Smart Lists is optional for targeting specific topics within a cluster.

Getting started

Create a Smart List in **Database.** (Figure 1.0)

Note: Best practice to create a folder to store all Bombora Company Surge® Smart Lists.

Figure 1.0

Lead Database
Group Smart Lists
Bombora Cluster Topics
SL - ABM-Cluster - Account Planning
SL - ABM-Cluster - Buyer Journey
SL - ABM-Cluster - Intent Data

1.1

Go to Smart List filters, and in the '**Person Attributes**' folder choose '**Has Bombora Surge**'.

Click on '**Add Constraint**'.

Select '**Cluster Name**' and choose the applicable cluster (e.g. ABM-Cluster).

Click on '**Add Constraint**' again.

Select '**Topic**', select 'contains' and enter the specific Topic (e.g. Intent Data). (Figure 1.1)

Note: Repeat steps for creating a Smart List for other topics as needed.

Figure 1.1

SL - ABM-Cluster - Intent Data | People | Smart List
New | List Actions
Use ALL filters | Collapse All | Expand All
1 - Has Bombora Surge
Add Constraint
Has Bombora Surge: true
Cluster Name: is | ABM-Cluster
Topics: contains | Intent Data

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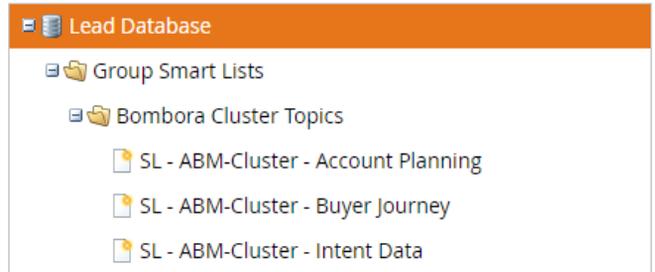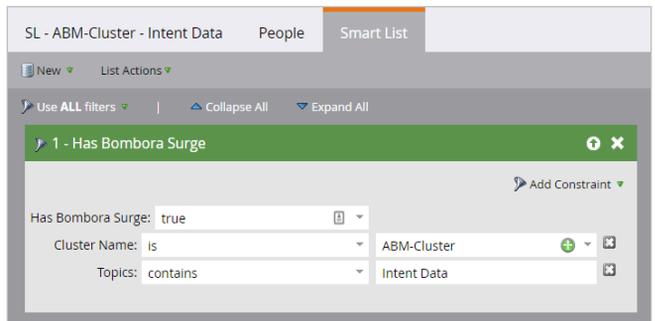
Company Surge® cluster segmentation (optional)

If you're subscribed to multiple clusters, some businesses may be showing intent across several clusters. Creating a segmentation program is an effective way to set cluster priorities and help ensure individuals are not added to multiple campaigns or nurture programs at the same time.

Additionally, Marketo segmentations help to:

✓ Create dynamic content in emails and on landing pages

✓ Group analytic and email insight reports

✓ Simplify Smart List filtering

Please note, Marketo Segmentation does not allow Marketo or Salesforce custom objects to be used as filters.

Therefore, Smart Campaigns are used to control membership of static lists that add/remove people from the segmentation. Steps for creating these static lists are outlined on the next page.

Five steps to create a cluster segmentation using Company Surge®

1 Creating a cluster management program and static lists for each cluster
Ensure individuals are not added to multiple campaigns at the same time though a cluster management program and creating cluster static lists

2 Smart Campaigns to add from list
Add people to your cluster static lists

3 Smart Campaigns to remove from list
Remove people from your cluster static lists

4 Creating segments
Prioritize your clusters

5 Defining segment rules and approving the segment
Create rules and set your program live

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Step 1 – Creating a cluster management program and static lists for each cluster

1.0 Navigate to '**Marketing Activities**', click the '**New**' drop-down and select '**New Program**'. (Figure 1.0)

Select an appropriate:
- '**Folder**'
- '**Program Type**'
- '**Channel**'
- **Program Name' (i.e. Bombora Surge Cluster Management).**

(Figure 1.0)

1.1 Within the program, select '**New**', '**New Local Assets**', and '**Lists**'.

Name the list, i.e. **List – Cluster – ABM-Cluster.**

Click '**Create**'.

Note: Repeat this step and create a static list for each of your clusters.

Figure 1.0

Figure 1.0

Step 2 – Smart Campaigns to add from list

2.0 Within the program, Select '**New**' and '**New Campaign Folder**'. Create an '**Add to List**' and a '**Remove from List**' folder. (Figure 2.0)

Figure 2.0

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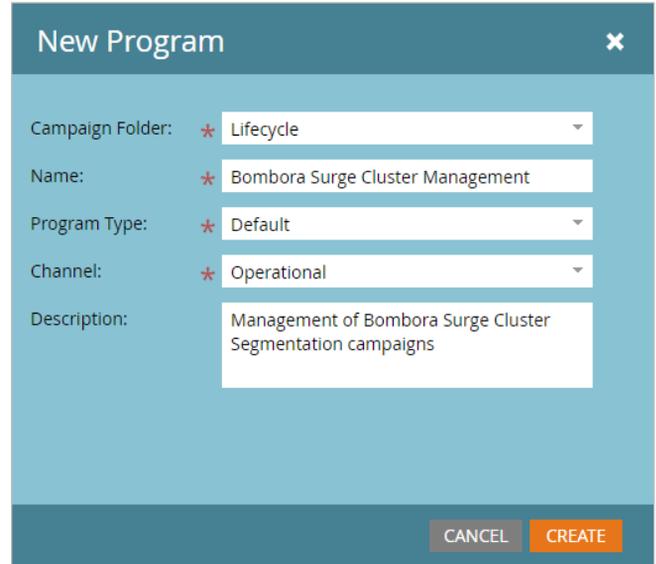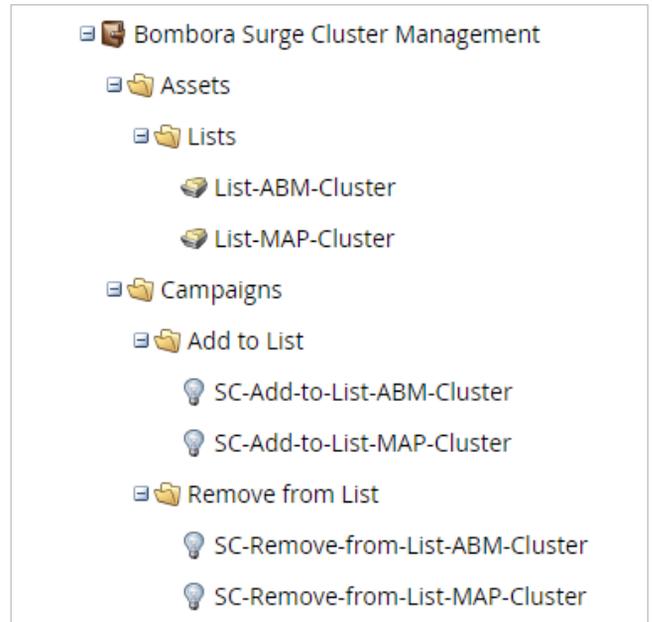
Step 2 – Smart Campaigns to add from list (cont'd)

2.1 Right click on the **'Add to list'** folder, and select **'New Smart Campaign'**.

Name it i.e. **'Add to list – ABM-Cluster'**, and then click **'Create'.**

Drag the Smart Campaign under the Add to list folder

2.2 Left click on **'Add to List – ABM-Cluster'** and then click on the **'Smart List'** tab

Drag the following List filters to the middle of your screen **'Person Attributes'**, **'Has Bombora Surge'** and **'Special Filters', 'Member of List'** on your right. (Figure 2.1)

2.3 Define Smart List filters, i.e **'Has Bombora Surge' > 'True', 'Cluster Name' is > 'ABM-Cluster'.**

Member of List > <u>Not In</u> > **Bombora Surge Cluster Management. List-ABM-Cluster**
(static list created in step 1)

2.4 Select **Flow** tab.

Select **Add to List** and the list name, i.e. **Bombora Surge Cluster Management. List-ABM-Cluster.** (Figure 2.2)

NOTE: Repeat steps for adding each cluster to the list.

Figure 2.1

Figure 2.2

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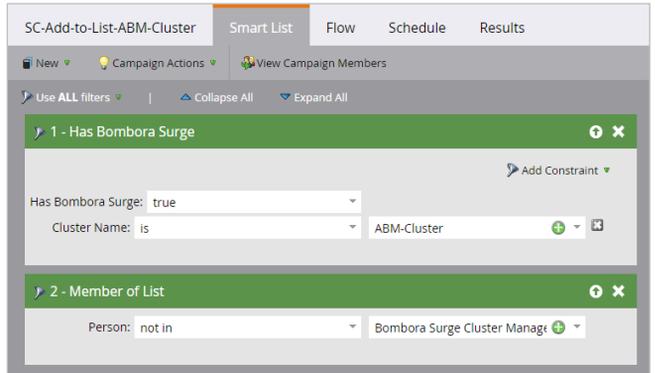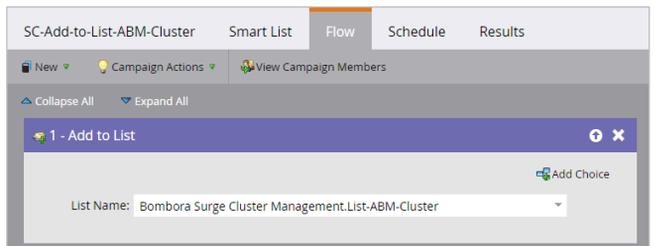
Step 3 – Smart Campaigns to remove from list

3.0 Select the **'Remove from List'** folder, and click on **'Smart List'**.

Right click on the **'Remove from List'** folder, and select **'New Smart Campaign'**. Name it i.e. **'Remove from List – ABM-Cluster',** and then click **'Create'**.

Drag the smart campaign under the **'Remove from List'** folder

3.1 Left click on **'Remove from List – ABM-Cluster'** and then click on the **'Smart List'** tab.

Drag the following List filters to the middle of your screen **'Person Attributes' > 'Has Bombora Surge'** and **'Special Filters' > 'Member of List'** on your right.

3.2 Define Smart List filters, i.e **'Has Bombora Surge' > 'False, 'Cluster Name' is 'ABM-Cluster'.**

'Member of List' > 'In' > 'Bombora Surge Cluster Management. List-ABM-Cluster' (static list created in step 1). (Figure 3.0)

3.3 Select **'Flow'** tab.

3.4 Select **Remove from List** and the list name, i.e. **Bombora Surge Cluster Management. List – ABM - Cluster.** (Figure 3.1)

NOTE: Repeat steps for removing each cluster to the list

Figure 3.0
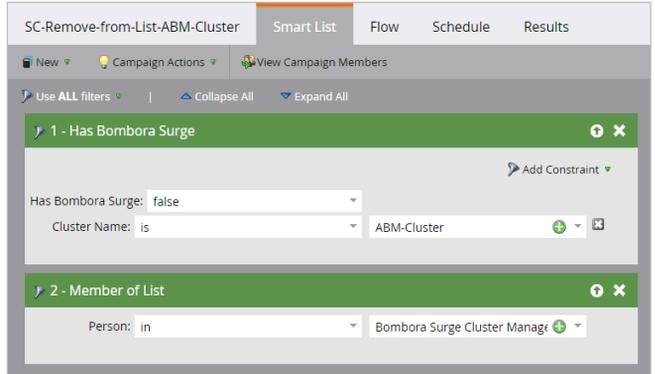
Figure 3.1
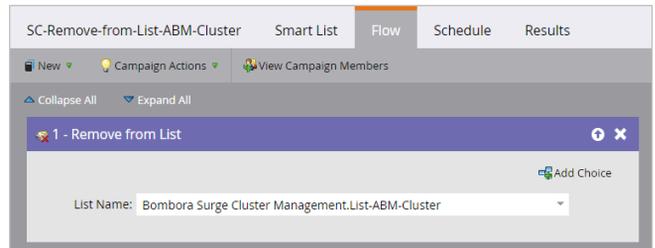
Step 4 – Creating segment

4.0   Navigate to '**Database**', click '**New**' and then '**New Segmentation**'. (Figure 4.0)

4.1   Type '**Primary Bombora Surge Cluster**' for the name, and click '**Add Segment**'.

4.2   Create a segment for each cluster, i.e. '**ABM-Cluster**' and click '**Create**'.

Order your clusters with the most important at the top in descending order. This will drive the priority in which contacts or leads are added to these segments.

Figure 4.0

Step 5 – Defining segment rules and approving the segment

5.0   Click on the program that you created under Segmentation, i.e. '**Primary Bombora Surge Cluster**', and select one of your cluster segments, i.e. '**ABM-Cluster**'. (Figure 5.0)

Figure 5.0

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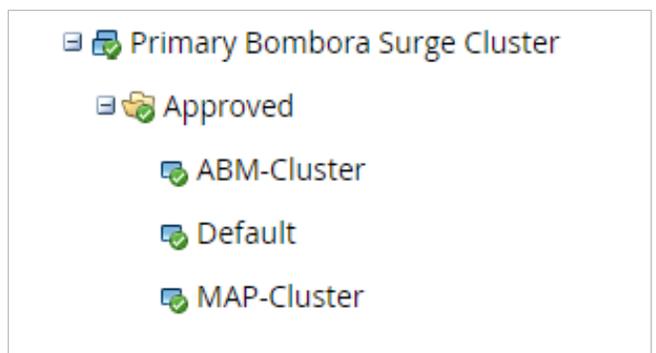
Step 5 – Defining segment rules and approving the segment (cont'd)

5.1 Select Smart List and '**Special Filters**' > '**Member of List**' on your right. Select '**Person**' > '**In**' > '**List – ABM - Cluster**'. (Figure 5.1)

NOTE: Repeat steps for each segment

5.2 Go go the top-level program, i.e. '**Primary Bombora Surge Cluster**', click on '**Segmentation Actions**' and '**Approve**'.

Figure 5.1
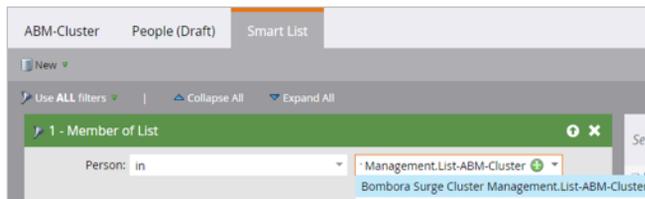
Company Surge® cluster count (optional)

When a target organization is showing intent across two or more clusters, it's a stronger indicator of their interest in your products or services. Adding a cluster count custom field in both the contact and lead record that aggregate the number of clusters spiking in Salesforce and syncing that information over to Marketo is an easy way to help your sales team prioritize their target accounts, and for you to action against this information for marketing.

Creating a custom field in Salesforce and Marketo (requires admin access)

1.0 Log into Salesforce, navigate to the Settings Gear and click on '**Setup**'.

Select '**Objects and Fields**,' click on '**Object Manager**', click on '**Contact**', and then click on '**Fields and Relationships**'.

Select '**New**' and choose '**Number**' field. Click '**Next**'. (Figure 1.0)

Figure 1.0

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Creating a custom field in Salesforce and Marketo (requires admin access, cont'd)

1.1 Enter the following information

- ➢ Field Label: Bombora Surging Clusters Count
- ➢ Length:10
- ➢ Decimal:0
- ➢ Field Name Bombora_Surging_Clusters_ Count

Click '**Next**'.

1.2 You will now be on the Field Level Security screen.

Set visibility to yes for all profiles.

Set edit access to "read only" for all profiles outside of the Marketo integration user; the profile of the Marketo integration user must has edit access.

1.3 Click '**Next**' and select the layout(s) you would like the field to appear (i.e. Sales layout) and '**Save**'.

NOTE: Repeat steps for creating field on Lead object.

1.4 Wait 5-10 minutes until the fields sync with Marketo.

1.5 Once the field is synced, in Marketo, go to **Admin** and select **Field Management**.

Select **Bombora Surging Clusters Count** field. In **Field Actions**, select **Change Type**.
In the dropdown, select **Score** and click **Change**. (Figure 1.1)

Figure 1.1

Change Type   ✕

Change the type of **Bombora Surging Cluster Count** from **Integer** to:
Field Type:

- Boolean
- Currency
- Date
- Datetime
- Email
- Float
- Percent
- Phone
- Score
- String
- Text Area
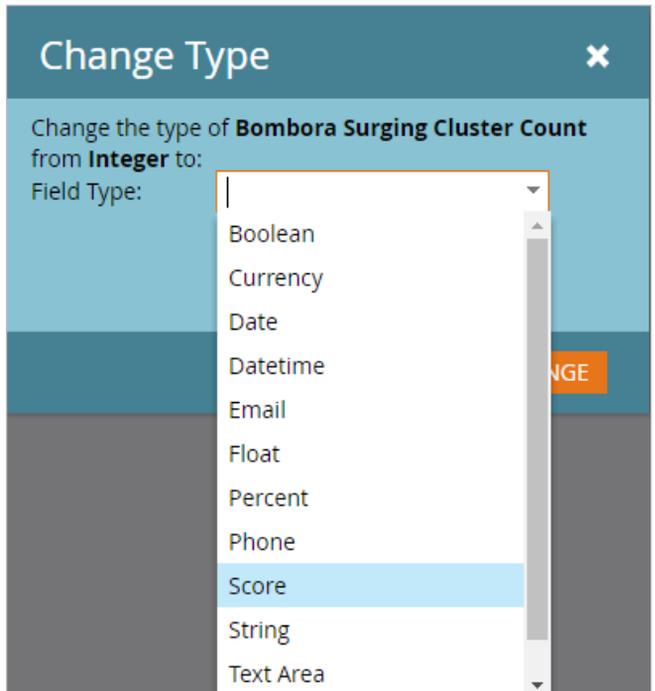
Creating a custom field in Salesforce and Marketo (requires admin access, cont'd)

1.6   In Marketo, navigate to the Segmentation program created previously from page 6-10 (i.e. **Bombora Surge Cluster Management**).

Go to your **'Add to List – ABM - Cluster'** Smart Campaign and go to **'Flow'**.

Under the Marketing folder, Select **'Change Score'**.

Select **'Bombora Surging Clusters Count'** from the dropdown and **'Change +1'**. This will automatically add 1 to the cluster count field when the contact or lead is spiking in interest. (Figure 1.2)

NOTE: Repeat steps for each **'Add to List'** Smart Campaign.

Figure 1.2

Creating a custom field in Salesforce and Marketo (requires admin access, cont'd)

1.7 Navigate to the Segmentation program created previously from page 6-10 (i.e. **Bombora Surge Cluster Management**).

Go to your '**Remove from List – ABM-Cluster**' Smart Campaign and go to '**Flow**'.

Under Marketing, Select '**Change Score**'.

Select '**Bombora Surging Clusters Count**' from the dropdown and '**Change -1**'. This will automatically subtract 1 from the cluster count field when the contact or lead is spiking.
(Figure 1.3)

NOTE: Repeat steps for each '**Remove from List**' Smart Campaign.

Figure 1.3

Date of last Company Surge® (optional)

Create a field in Marketo to display the last time a person was interested in one or more of your topic clusters.

Create a custom field in Salesforce and Marketo (requires admin access)

1.0   Log into Salesforce, navigate to the Settings Gear and click on '**Setup'.**

Select '**Objects and Fields',** click on '**Object Manager**', click on '**Contact**', and then click on '**Fields and Relationships**'.

Select '**New**' and choose '**Date**' field. Click '**Next'.**

(Figure 1.0)

Figure 1.0
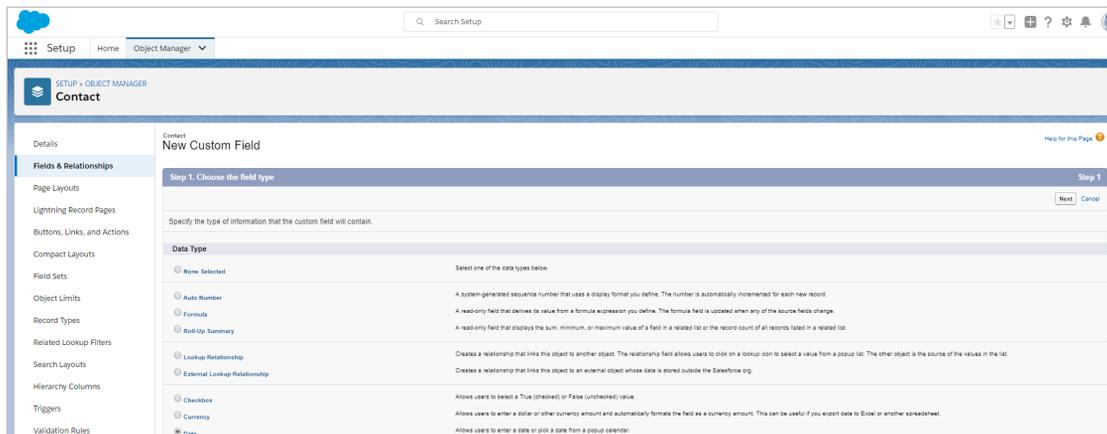
Date of last Company Surge® (optional)

Step 1: Create a custom field in Salesforce and Marketo, continued

1.1   Enter the following information

- ➢ Field Label: Last Bombora Surge
- ➢ Description: The date the person last showed interest in the topic cluster.
(Figure 1.1)

Click '**Next'**.

1.2   You will now be on the Field Level Security screen.

Set visibility to yes for all profiles.

Set edit access to "read only" for all profiles outside of the Marketo integration user; the profile of the Marketo integration user must has edit access.

1.3   Click '**Next'** and select the layout(s)   you would like the field to appear (i.e. Sales layout) and '**Save'**.

NOTE: Repeat steps for creating field on Lead object.

1.4   Wait 5-10 minutes until the fields sync with Marketo.

Figure 1.1

Contact
New Custom Field

Step 2. Enter the details

Field Label	Last Bombora Surge
Field Name	Last_Bombora_Surge
Description	The date the person last demonstrated a Bombora Surge.
Help Text	
Required	☐ Always require a value in this field in order to save a record
Default Value	Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

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Date of last Company Surge® (optional)

Step 2: Create last Company Surge® date Smart Campaign

2.2 Navigate to '**Marketing Activities**', click the '**New**' drop-down and select '**New Smart Campaign**'.

Place it an appropriate folder and name it "Last Bombora Surge Date"

Figure 2.2

2.2 Click on the "Smart List" tab.

In the search bar on the right enter "Added to Bombora Surge".

Drag the "Added to Bombora Surge" trigger onto the middle of your screen.
(Figure 2.2)

Figure 2.3

2.3 Click on the "Flow" tab.

Drag "Change Data Value" onto the middle of your screen.

Select "Last Bombora Surge" for the attribute

Enter *{{system.date}}* in the new value field
(Figure 2.3)

Figure 2.4

2.4 Click the "Schedule" Tab.

Click the "Edit" button

Update the run sequence to "every time" and click save.

Activate the smart campaign
(Figure 2.4)
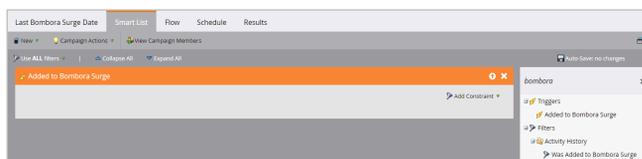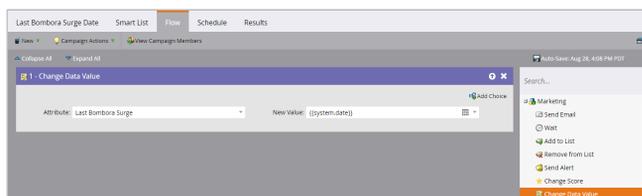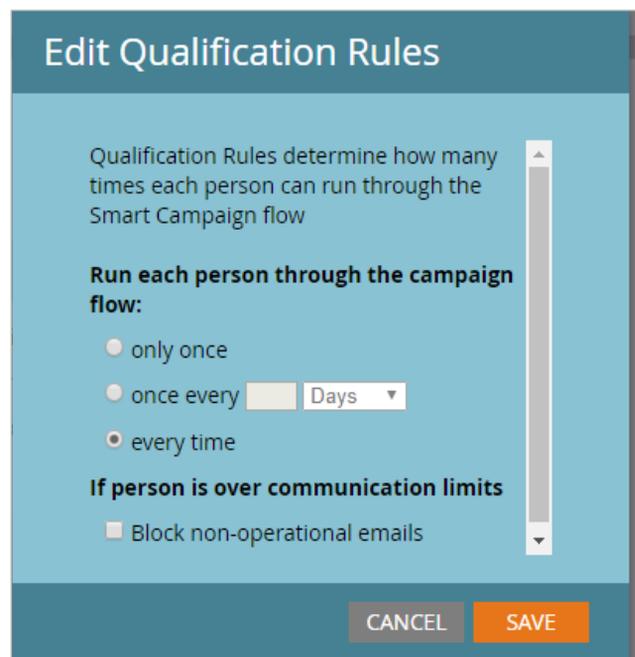
Surf's up.
Let's take off.

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

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