



From Request to ROI

Integrating Workfront into a MarTec Ecosystem

Presenters




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“Can’t we just
integrate with that?”

Topics for today

1. What is a martec stack/ecosystem?
2. Our integrations and how they work for us (as an example for you, not a prescriptive how-to)
3. From request to ROI – follow the campaign ID!
4. Questions





What the What?

What is a Martec Ecosystem? Or, There Must Be an Easier Way to Say That!





There really isn't. So What is it?

- All the systems that touch leads, contacts, customers, expenses, campaign metrics, and reporting that Marketing needs.
- Connected via API or out-of-the-box integrations.
- Data moved automatically between systems based on rules



How do integrations usually work?

1) Unique ID

- Defines what record to pull

2) Triggers

- When to pull the record(s)
- Dates
- Data change
- Updates

3) Rules about what data to update, change, or ignore in specific fields



Examples of ID's, Triggers, & Rules

1) Unique ID

- Project ID
- Issue ID (not reference)
- Expense ID

2) Triggers

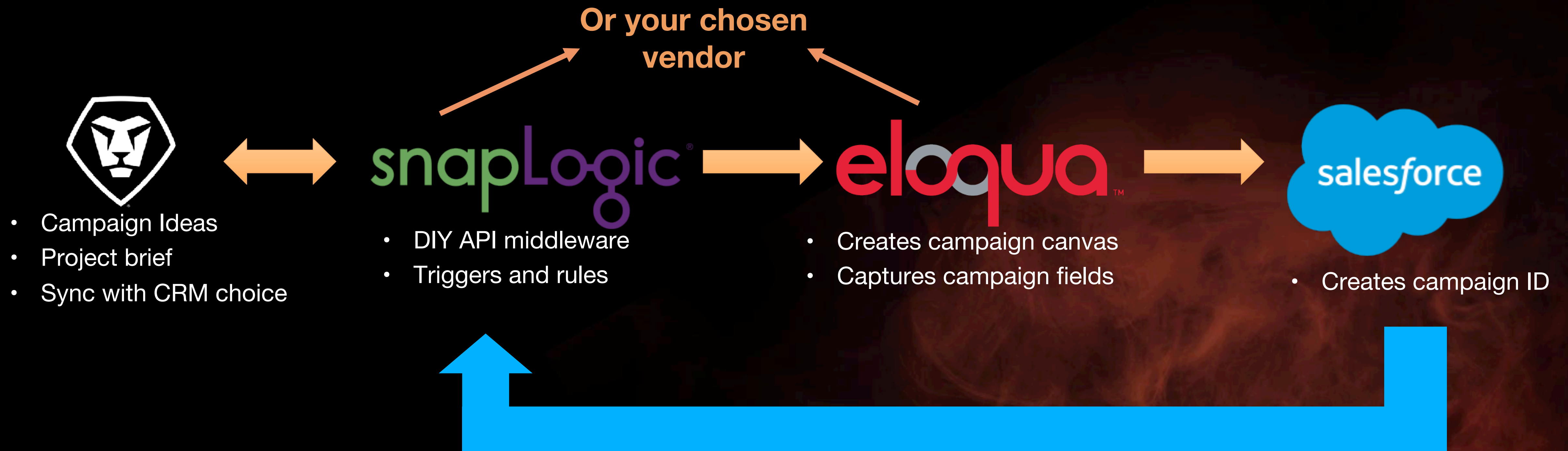
- New record
- Entered between X and Y date
- Status change

3) Rules about what data to update, change, or ignore in specific fields

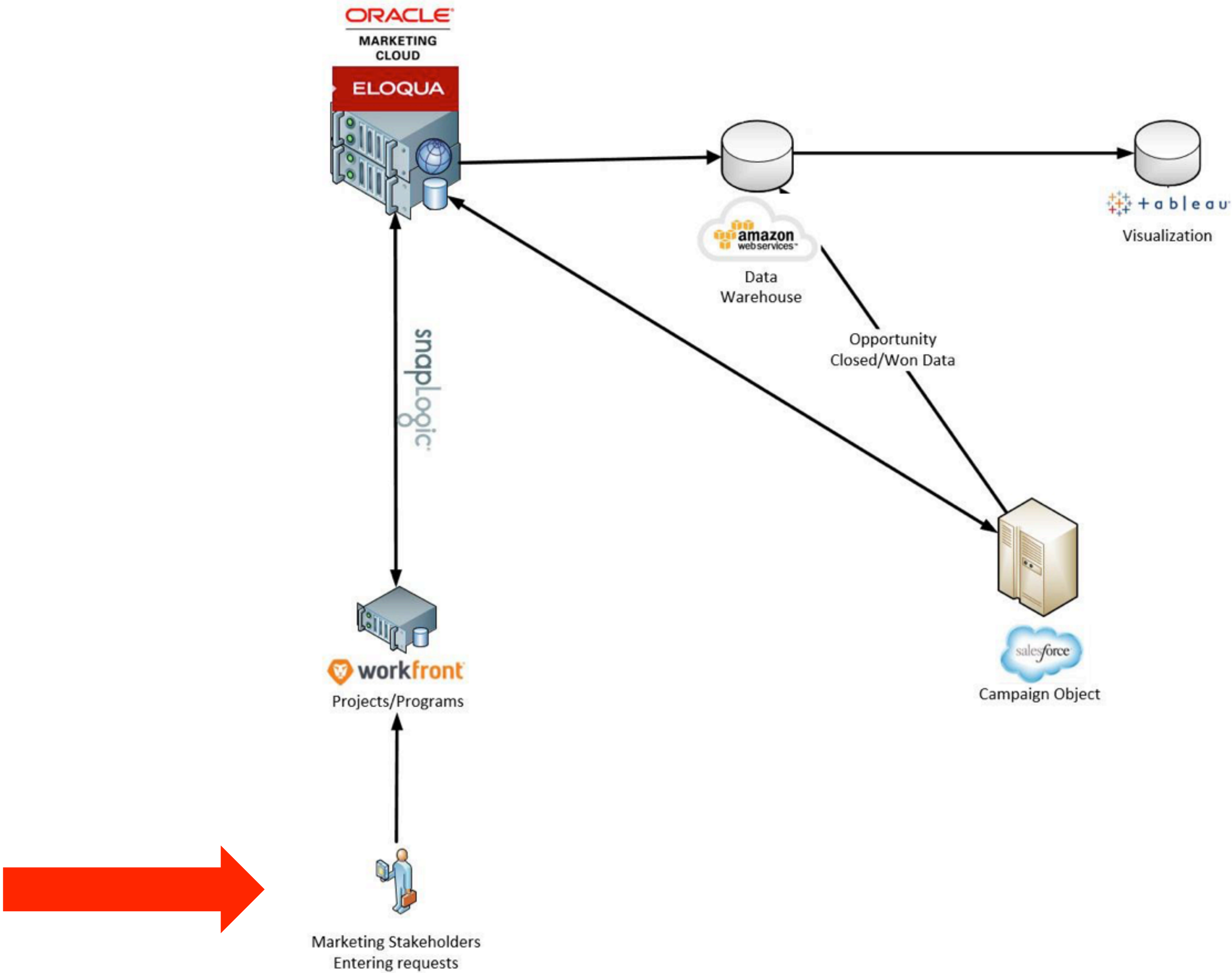
- Update if blank?
- Overwrite if changed since last date?
- Create new record?
- Delete record if X
- Many other options



How Our Main Integration Flows



ADP Marketing Ecosystem



At ADP, Workfront reporting is for high level and ad hoc campaign results, reporting, and planning, hopefully soon the operational system of record for marketing.

Tableau mainly, but in cooperation with other systems, acts as the analytics “final-final” analytics and reporting system.



CRM Sync Required Fields

Campaign Template ?

ES - SE - Multi-Touch Nurture Program Canvas ▼

Child Campaign Budgeted Cost ?

60000

Child Campaign Actual Cost ?

0

Campaign Type ?

Awareness ▼

Child Campaign Channel

- | | | |
|--|---|--|
| <input checked="" type="radio"/> Digital - Web - SEM/Display | <input type="radio"/> Digital - Web - Other | <input type="radio"/> Digital - Web - Social |
| <input type="radio"/> Digital - Pay Per Lead | <input type="radio"/> Digital - 3rd Party Site Ad Buy | <input type="radio"/> Emails |
| <input type="radio"/> On Demand Campaign | <input type="radio"/> Nurture Programs | <input type="radio"/> Campaign |
| <input type="radio"/> Field Campaign | <input type="radio"/> Event - ADP | <input type="radio"/> Event - Non ADP |
| <input type="radio"/> Media | <input type="radio"/> PR | <input type="radio"/> Other |
| <input type="radio"/> None | | |

Child Campaign Reporting Start Date ?

Fill out Project
Brief to start
sync



Campaign Type
Lead Generation

Child Campaign Channel
Digital - Web - SEM/Display

Child Campaign Reporting Start Date
4/15/16

Child Campaign Reporting End Date
6/30/16

Integration Fields - admin only

Included in Opportunity ROI
+Add

Eloqua Form Names
+Add

Returned Campaign IDs

Eloqua Parent Campaign ID_via Program
8891

Eloqua Child Campaign ID
8898

SFDC Child Campaign ID - DO NOT EDIT
70133000000xoSO

SFDC Parent Campaign ID_viaProgram
70133000000xoRz

Campaign ID's returned for use in
campaigns!



Some nomenclature

- Program = Parent in SFDC
- Project = Child in SFDC
- Eloqua ID = Canvas

THIS IS SO HARD TO GRASP FOR SOME REASON!



ID's Can Be Used For:

- Tagging PPC links
- Hardcoded to form fields
- Tagging referrals
- Supply to advertising vendors
- Tagged email links

Campaign Type
Lead Generation

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Digital - Web - SEM/Display

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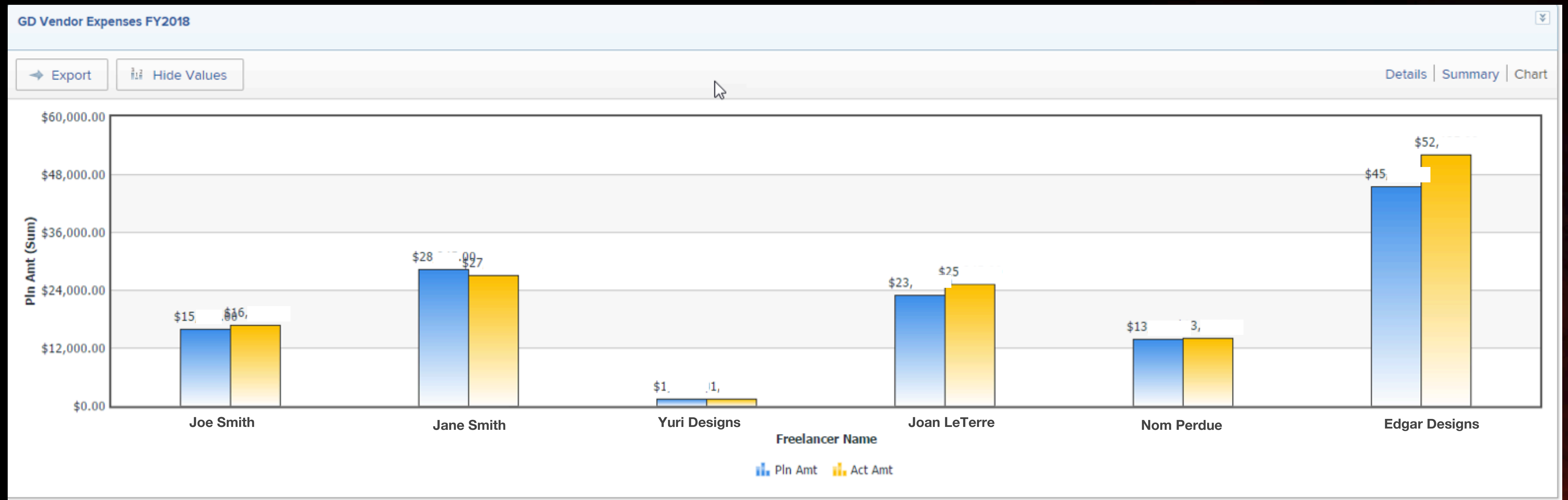
SFDC Parent Campaign ID_viaProgram
70133000000xoRz

Super easy to track!

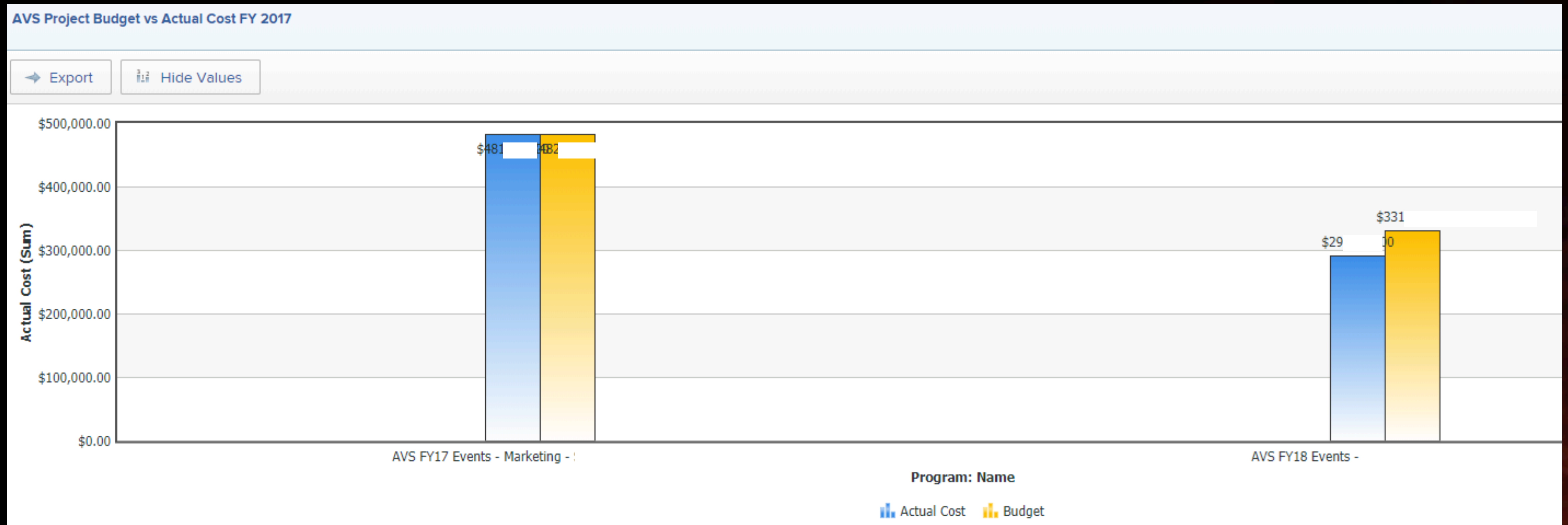
Business Unit	Name	Owner	Due On ↓	% Complete	Eloqua Parent Campaign ID_via Program	Eloqua Child Campaign ID	Program: SFDC Parent Campaign ID	SFDC Child Campaign ID - DO NOT EDIT
Corporate	ES_ION_BLOGS_INFLUENCE		1/31/21	100%	15984	19490	7010b00000013TSC	7010b00000013XMc
Corporate	ES_BOOST_INFLUENCE		1/31/21	100%	15984	19489	7010b00000013TSC	7010b00000013XMZ
Corporate	ES_THRIVE_INFLUENCE		1/31/21	100%	15984	19487	7010b00000013TSC	7010b00000013XMX
Corporate	ES_SPARK_INFLUENCE		1/31/21	100%	15984	19488	7010b00000013TSC	7010b00000013XMY
Small Business Services	SBS_FY18_HR411_Add EE Lead		7/1/19	100%	17523	17529	7010b00000013VGo	7010b00000013VH9
GES	IPA Website Lead Capture		3/16/19	0%	14629	14628	7013300000013OI1	7013300000013Okr
Corporate	ES_FY17_Q3_EnagementMeter2.0-Leads		1/1/19	100%	13322	14618	7013300000013KAJ	7013300000013OiM



Adding Expenses to Project and Integration



Example side benefit of expenses



Filters applied by SnapLogic

- Expense is in an active project?
- Expense is a marketing “type of work”
- Expense is new (create) or existing (update)
- If existing, has desc or amount changed
- Campaign end date is not => today

Total
actuals
summed
by Snap

Expenses
linked to
projects

GD Vendor Expenses FY2018							
Export							
<input type="checkbox"/>	Project Business Unit	Proj Owner	Description	Type of Work/Price List	Planned Amount	Actual Amount	Proj Name
▼ Freelancer Name: Gary Herman (4)					\$3,975.00	\$2,725.00	
<input type="checkbox"/>	HR/BPO		ADP Elite Event Logo	Other including drops, direct mail small and large	\$500.00	\$500.00	HRO_FY18_Super Elite Microevent in a Box
<input type="checkbox"/>	HR/BPO		ADP Elite Event Guidebook	Booklet Price B	\$1,625.00	\$1,625.00	HRO_FY18_Super Elite Microevent in a Box
<input type="checkbox"/>	Small Business Services			Booklet Price A	\$1,200.00	\$200.00	SBS Inside Sales_FY18 Franchise Vertical Market Playbook
<input type="checkbox"/>	Retirement Services			PDF Price B	\$650.00	\$400.00	RS - New Competitive Intel - Voya



STOP!!! Why do we do it this way?

- It kindly “forces” proper data for campaign tracking fields
- Expense entry in WF allows easy access to costs to-date
- Expenses used in other backend reporting systems
- Easy to update many values at once and update multiple systems



Revenue values returned by SnapLogic

- Summed revenue against CID to-date
- Total is updated until campaign end date

ADP HCM Products BU > Q1 Lead Gen

Event A

Project Owner
Tim Dubroy
Marketing Ops

Tasks Project Details Updates Documents Issues Expenses | ▾

Overview Custom Forms Finance Portfolio Business Case

Project Info

Description
A great example for Leap!

Project Owner Tim Dubroy	Project Sponsor +Add	Portfolio ADP HCM
Planned Benefit \$20,000.00	Status Current	Fixed S +Add



Tableau report revenue and pipeline data including campaign IDs

**Note, Workfront is for quick, at-a-glance
reporting that is easy to access.**

Tableau is the “final word” on reporting

**We are changing so only lead-based info is in
WF such as CPL**



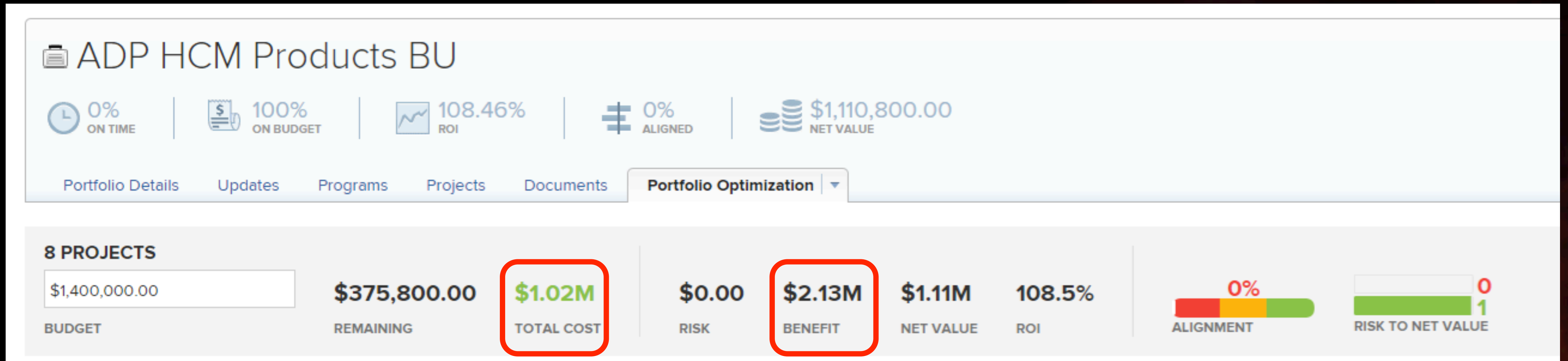
- So to summarize the klugy solution

- Revenue from Snap goes to Planned Benefit
- All costs are summed Actual Costs via expenses in WF
 - Expenses also pushed to Tableau via Snap



Optimizer used for Reporting

Nice to look at, hard to use



By Campaign								
Marketing Campaign Type	SFDC_CAMPAL..	ACTUAL_COST	INF OPPTY #	INF OPPTY \$	INF PIPELINE #	INF PIPELINE \$	INF CW #	INF CW \$
Grand Total		\$005K	19,976	\$116,588K	7,395	\$54,718K	5,867	\$26,451K
	Null	\$0K	58	\$16K	12	\$1K	16	\$1K
	7010b0000001QorJ	\$0K	3	\$23K	3	\$23K	0	\$0K
	7010b0000001QorK	\$0K	2	\$0K	2	\$0K	0	\$0K
	7010b00000013TBE	\$0K	6	\$28K	1	\$17K	2	\$1K

Portfolio Details

Updates

Programs

Projects

Documents

Portfolio Optimization

8 PROJECTS

\$0.00

BUDGET

(\$1.02M)

REMAINING

\$1.02M

TOTAL COST

\$0.00

RISK

\$2.13M

BENEFIT

\$1.11M

NET VALUE

108.5%

ROI

0%

ALIGNMENT

0

1

RISK TO NET VALUE

Set Priority

Export

<input checked="" type="checkbox"/>	#	SCORE	NAME	NET VALUE ↑	ALIGNMEN.	COST	RISK	ROI	STATUS	FLAGS
<input checked="" type="checkbox"/>		<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div></div>	Lead Gen A	\$2,800.00	0%	\$12,200.0	\$0.00	23%	Current	
<input checked="" type="checkbox"/>		<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div></div>	Demo 3	\$18,000.0	0%	\$2,000.00	\$0.00	900%	Current	
<input checked="" type="checkbox"/>		<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div></div>	Inside Sales Campaign A	\$18,000.0	0%	\$2,000.00	\$0.00	900%	Current	



We did it the hard way... we recommend instead

- For actual costs:
 - Via expenses as we did
 - *Via return from finance software that generate expense entries against unique ID*
- For actual revenue (or any relevant fields):
 - Use custom fields unique to your process
- Use reporting and do ROI via text mode in column



The easier way might look like this

CPL and Revenue on HCM In-Market or Complete Campaigns

Details Summary

Export

Filter Report Default View Report Def

Portfolio: Name: ADP HCM Products BU (8)

Name	Owner	Due On	SFDC ID	Actual Cost	Rev Goal	Actual Rev To-Date	Leads To-Date	CPL
Demo 3				\$2,000		\$18,000	300	6.6666666667
Lead Gen A				\$10,000		\$50,000	120	83.3333333333
Inside Sales Campaign A				\$34,000		\$85,000	450	75.5555555556
Demo 2				\$34,900		\$15,000	200	174.5
Integrated Campaign A				\$10,000		\$30,999	543	18.4162062615
Event A				\$8,789		\$45,000	29	303.0689655172
Demo 1				\$90,202		\$100,100	129	699.2403100775
Event B				\$4,300		\$200,124	120	35.8333333333

Can be ROI, oppty cost, pipeline value....



Next Phase for Campaign Tracking and ROI for ADP

Tracking at Campaign level

- Use reporting not Optimizer
- Use programs for aggregate reporting
- Build YOY or QOQ Dash

Expenses Integration

- Expense entry in WF triggers invoice payment in Finance software

EVP Dash for ad-hoc reporting

- Allow exec to see results without meetings



Summary

First Steps

- Create an ecosystem
- Decide what fields to update
- Create system to capture expenses
- Create form to trigger

Campaign Tracking Steps

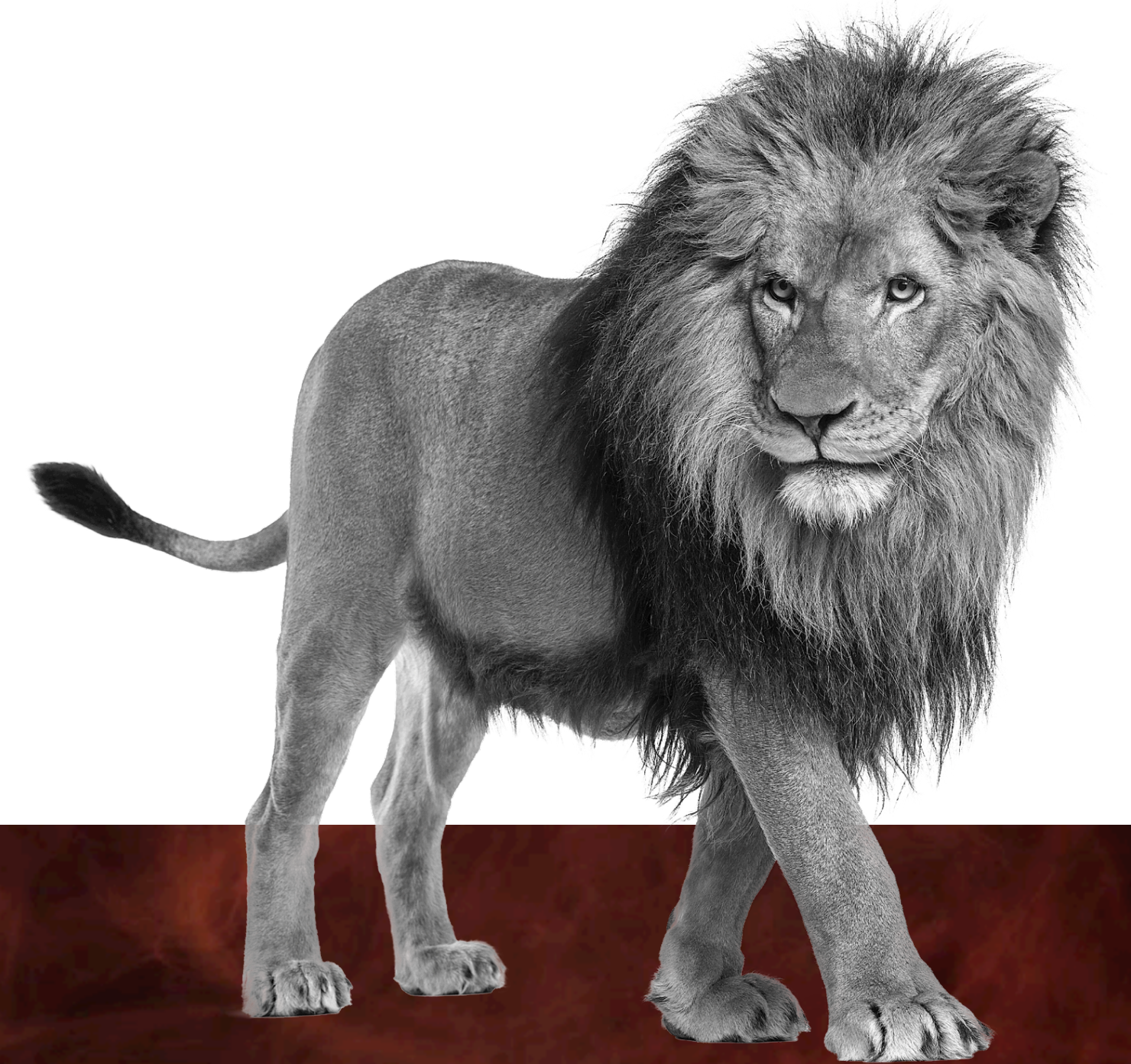
- Get Campaign IDs
- Tag your campaigns
- Collect expenses
- See reporting

ROI Factors

- Combine with revenue data
- Combine with costs/expenses



Questions?





LEAP

2018 USER CONFERENCE

