Oktopost

The Definitive Guide to **Social Engagement in Marketo**

How to Enrich your Lead Scoring, Nurturing, Attribution, and Segmentation with Oktopost

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Introduction

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Scope of Series

The B2B buyer journey has changed. Customers have adopted a level of self-sufficiency and proactiveness that no longer aligns with the conventional sales model.

Today, more than ever before, social media plays a significant role in shaping your prospect and customer experience, with more than half (53%) of B2B buyers[1] turning to networks like Facebook, Twitter, and LinkedIn to make key purchasing decisions.

In a world where every lead is active on social, what are you doing to track this activity, and ultimately, leverage it for better engagement? This definitive guide seeks to answer this question. Designed for both novice and seasonal Marketo users, it lays the foundation for identifying the current blind spots in your existing Marketo programs and integrating social engagement data to better manage, target, and convert leads.

Before reading on, the following section provides a broad introduction to marketing automation platforms and their core capabilities. Moreover, it helps you visualize the dataset that currently exists inside Marketo while presenting social engagement as a missing entity. It then goes on to surface the gap between the "buyer journey that Marketo sees" and "what really happens".

[1] Demand Gen Report: The 2016 B2B Buyer's Survey Report

Overview of Marketing Automation

What is Marketing Automation?

Marketing automation allows companies to streamline, automate, and measure marketing tasks and workflows to increase operational efficiency and grow revenue faster. It essentially acts as a central marketing database, engagement marketing engine, and an analytics platform. Nowadays, Marketing Automation technology is essential to scale your activities, especially with the increasing number of channels marketers are required to manage.

67% of marketing leaders currently use a Marketing Automation Platform.

Over the next two years, an additional **21%** of Marketing Leaders plan to use a Marketing Automation Platform.[2]

Why Use Marketing Automation?

There are several reasons to consider using a marketing automation software. **The average decision-maker (or buyer) receives 3,000 messages per day** – that's a lot of companies vying for one person's attention.

Buyers form opinions and draw conclusions long before they interact with your company. According to a recent CEB research, **the average B2B buyer is 60% of the way through a purchase process prior to reaching a salesperson.**[3] By the time customers speak to your company, they have already established their needs, prioritized their solutions, and set benchmarked pricing.

To remain competitive in this new buying cycle, you need to have a strong online presence that engages buyers at every stage of the sales funnel. Marketing automation helps you cut through the noise while building relationships with buyers over time.

[2] Salesforce: State of Marketing Report
[3] CEB Research: Two Numbers You Should Care About

What Are the Key Marketing Automation Capabilities?

Looking at a B2B marketing technology stack, marketing automation is the main component that allows you to perform three powerful programs: lead nurturing, lead scoring, and lead attribution.

Lead Nurturing

It's one thing to attract potential buyers, but quite another to keep them engaged and interested in your company throughout the buyer journey. In fact, only 20% of leads are sales-ready when they first come in, making it pertinent to have a disciplined process for building relationships with leads over time.[4]

This is where lead nurturing comes in. Once you have qualified leads in your database, the next step is to educate and engage them with highly relevant content across multiple channels, in turn, driving them further down the sales funnel.

Companies that excel at lead nurturing generate:

50% more sales ready leads at a 33% lower cost [4]

Some basic examples of lead nurturing includes:

- **Email:** Create email cadences that keep your product or service top-of-mind, including thought leadership pieces, case studies, webinars, etc.
- **Retargeting:** Implement personalized retargeting through ads that focus on a buyer's perona, organization, and vertical.
- **Website:** Customize a buyer's web experience in real-time by presenting the most relevant content based on their intent, behavior, and profile.

[4] Marketo: The Definitive Guide to Marketing Automation

Lead Scoring

Beyond lead nurturing, marketing automation includes lead scoring capabilities, which help marketers make sure they only pass sales leads that have a strong chance of becoming customers. Lead scoring is generally based on three basic factors:

- **Fit based on demographics or firmographics.** Does a lead seem like a good candidate to be a customer based on his location, company size, and industry?
- **Interest.** If the lead is consistently downloading content, viewing webinars, or asking for a product demo, his interest level in your brand is probably high.
- **Buying Stage.** Is your prospect in the position to make a purchasing decision? If not, they may need to be passed back to the marketing team for further nurturing.

Lead Attribution

An attribution model analyzes the interactions that led to a specific website conversion or sale. The more insight you have into the effect of marketing campaigns on sales outcome, the better you can use that information in future campaigns. Marketers usually adopt one of three main models to measure success:

1. **First Touch:** The first interaction taken by the lead receives 100% of the credit.

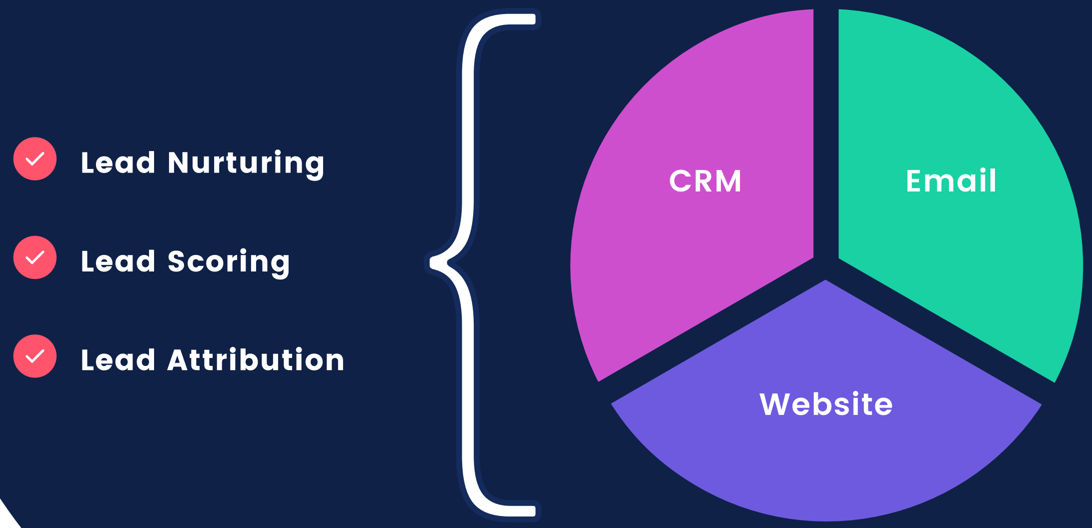
2. **Last Touch:** The last interaction taken by the lead receives 100% of the credit.

3. **Multi Touch:** All interactions in the conversion path share equal credit leading up to the conversion.

Allocating revenue spend over multiple activities allows you to determine which marketing activities are effective for the top-of-the-funnel versus the bottom-of-the-funnel. For example, you can determine that trade shows are great for garnering leads, whereas webinars are more effective for pushing leads through the funnel. Without multi-touch attribution, it's difficult to understand this information and your campaigns may not be as successful.

Marketo Data Before & After Oktopost

Many of your leads are leaving "digital footprints". They research their problem online, land on your website, and eventually consume your content. The trail of activity they leave behind is tracked and collected by Marketo.



More to the point, Marketo aggregates lead activity from 3 key sources: website, email, and third party data from a CRM. Using this data, marketers can understand audience behavior such as website visits, email clicks, content downloads, and other engagements with your brand – and use it to score, nurture, attribute, and segment leads inside Marketo.

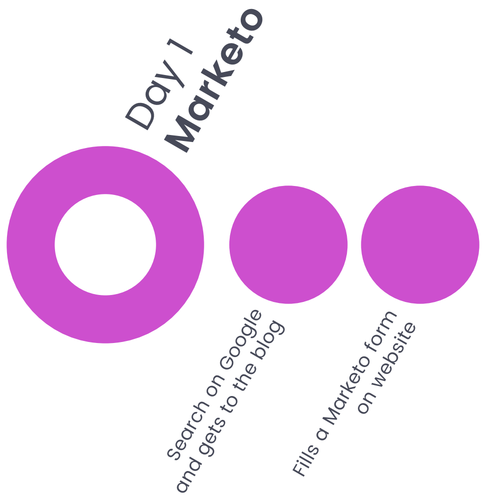
While this data may seem sufficient to understand the buyer journey; unfortunately, it doesn't give you the whole picture. By the time a lead reaches your site, they've already completed 60% of the research online [5] – namely, on social media. Failing to track this social media behavior has a twofold impact:

1. You have major blind spots in your scoring, nurturing, and attribution models
2. Your sales team is wasting time communicating with a bunch of unqualified leads

[5] CEB Research: Two Numbers You Should Care About

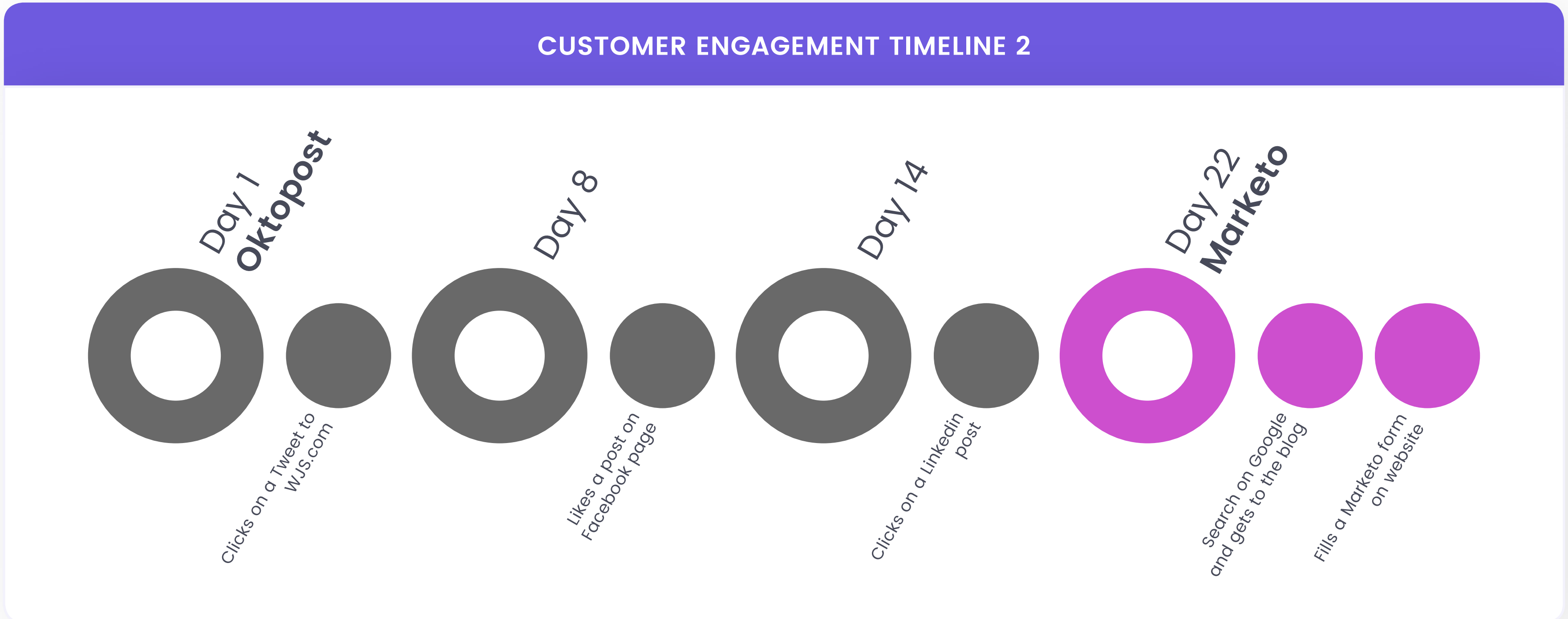
Luckily, social engagement data can help fill this gap.
To illustrate this point, take a look at timeline #1:

CUSTOMER ENGAGEMENT TIMELINE 1



This is what Marketo views as a typical user interaction with a company's assets. On day 1, a lead does a quick Google search, discovers Company A's blog, and eventually fills out a web form, which triggers the Marketo programs.

Now take a look at the timeline #2.



This is what really happens. On day 1, a lead clicks on a Tweet to Wall Street Journal.com. 7 days later, he likes a post on the company's Facebook page. On day 14, he clicks on a LinkedIn post. Eventually, on day 22, he does a quick Google search, which leads him to the company's blog, whereby he fills out a web form that creates a lead in Marketo.

As it turns out, Marketo is missing a significant chunk of the buyer journey – social media activity. This chunk plays a critical role in the buyer's awareness, evaluation, and decision making process.

This additional layer of social engagement data fills a major blind spot in Marketo, which is illustrated in the table below:

MARKETO RECORD SET	WITHOUT OKTOPOST	WITH OKTOPOST	WHAT'S IMPROVED?
Time to known lead	1 day	22 days	Better measurement of anonymous-to-known leads
Lead Source	Organic Search	Social -> Twitter -> Curated Content	Accurate lead attribution for social media leads
Lead Interest / Intent	Unknown	Based on content engaged on social	Improved lead nurturing / segmentation based on social engagement activity

In this respect, siloed social engagement refers to two things:

1. Any interaction with your social media content, including clicks, frequency of engagement, top engaging content topics, top converting posts etc.

2. Lead or prospect activity that is flowing from your social media channels to third party websites (e.g. a social post that links to a curated article or to any blog outside your website).

If tracked properly, social engagement can tell you a great deal about your leads' pain points, their top-of-mind interests, who they are connected to, and how to best target them. This data is extremely valuable not only because it's user-generated, but because it's typically fresh and accurate.

Now comes the good news!

By integrating Marketo with Oktopost, you can introduce a whole new dimension of social engagement data to Marketo. Every social engagement (link click, like, comment, share, etc.) is automatically synced with Marketo. Along with this social activity, Marketo users can view other data points such as, which network, profile, campaign, and content topic leads engaged with prior to converting.

All of this social engagement data integrates natively with Marketo. The question is, what can you do with it?

LEAD NURTURING:
Deliver highly-personalized nurturing emails to leads based on the content they engaged with on social media.

LEAD SCORING:
Build a scoring model that prioritizes social touch-points, and in turn, drives more qualified leads.

LEAD ATTRIBUTION:
Accurately attribute demand generation to social media activities – and give social media the credit that it deserves.

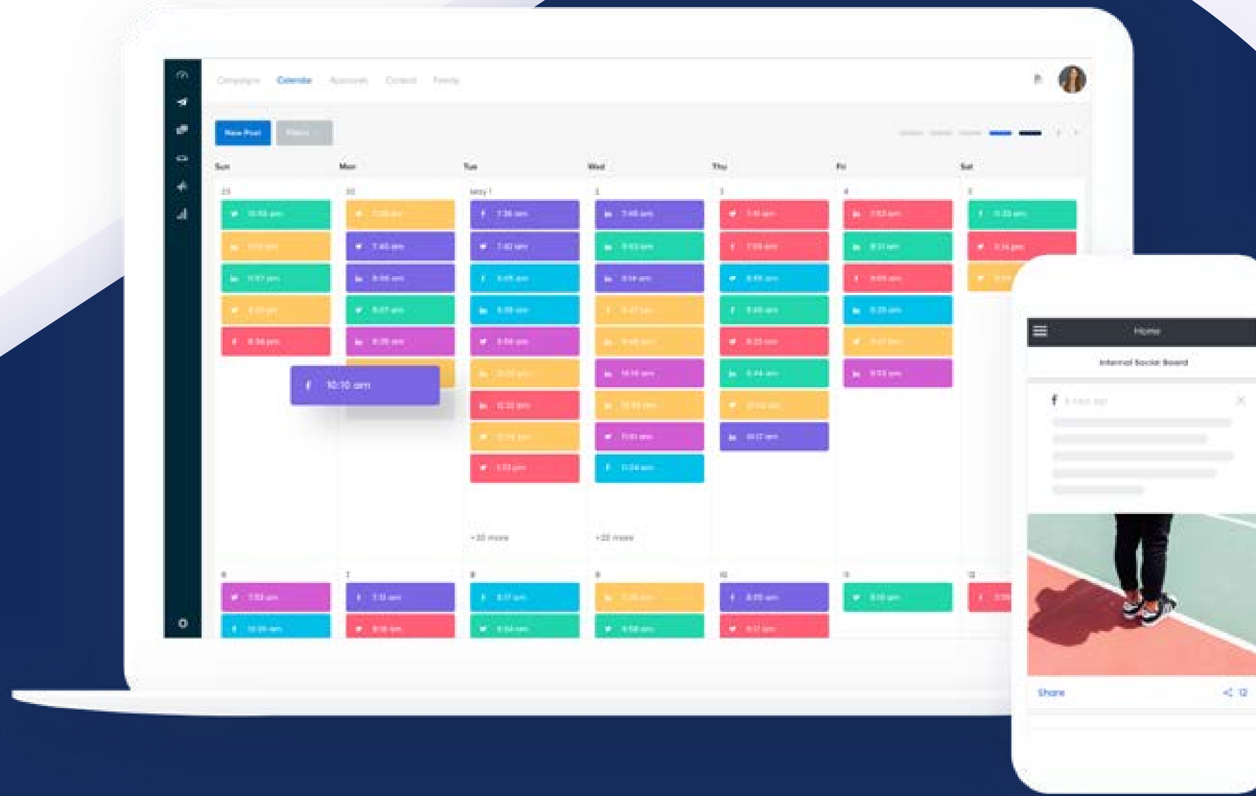
LEAD SEGMENTATION:
Segment audiences according to their interactions with social content, networks, and campaigns.

How Can Oktopost Help

Oktopost is the only social media management platform that is uniquely architected for B2B companies. Beyond publishing large volumes of content and engaging with audiences at scale, Oktopost is the first solution to establish the true ROI of social media, enabling marketers to track leads and integrate this data with other marketing and sales technologies.

With Oktopost, companies can say for the first time: "This new customer came from this LinkedIn post!"or "This Tweet brought us $XXX in sales!". Whether a lead came from a Tweet, LinkedIn post, or Facebook update, Oktopost enables users to attribute every sales opportunity to social media.

By integrating Oktopost with Marketo, B2B marketing teams can automatically push social media data without any manual input. For every social interaction, Oktopost appends the activity to known leads within Marketo for optimized lead nurturing, scoring, segmentation, and attribution.



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Lead Nurturing with **Social Engagement**

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What is Lead Nurturing

It's one thing to attract potential buyers, but quite another to keep them engaged and interested in your company throughout the buyer journey. In fact, only 20% of leads are sales-ready when they first come in, making it pertinent to have a disciplined process for building relationships with leads over time.[6]

This is where lead nurturing comes in. Once you have qualified leads in your database, the next step is to educate and engage them with hyper-personalized content across multiple channels in order to drive them further down the sales funnel.

Companies that excel at lead nurturing generate:

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Some basic examples of lead nurturing includes:

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Retargeting: Implement a highly personalized re-targeted ad, focusing on a buyer's perona, organization, and vertical.

Website: Customize a buyer's web experience in real-time by presenting the most relevant content based on their intent, behavior, and profile.

[6] Marketo: The Definitive Guide to Marketing Automation

Using Social Engagement to Improve Lead Nurturing

At its core, lead nurturing is rooted in data. The more data you have on leads, the better you can craft engaging content and messaging. It's not enough to base your conversations on audience's website and email activity – what about social media?

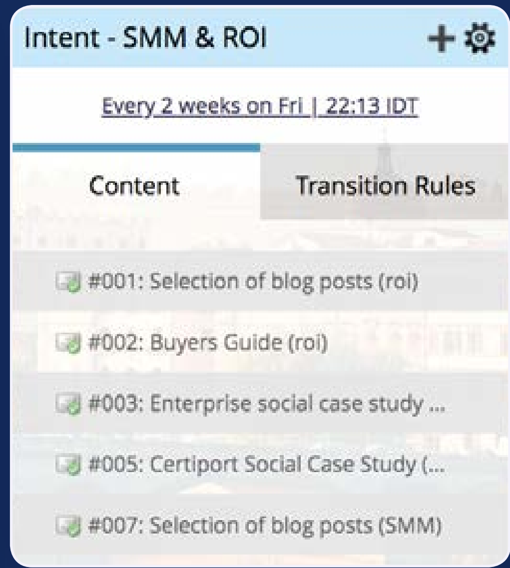
Buyers are spending an average of 116 minutes on social networks each day[7], making it an extremely important channel for marketers to leverage. Not to mention, social media is where **55% of buyers search for information and 84% of CEO's and VP's make their purchasing decisions.**[8]

If audiences are not active on your website but very active on Facebook, LinkedIn or Twitter, then you're missing out on a realm of valuable lead data, which can inform you of buyer's' needs, challenges, and interests. With the Oktopost-Marketo integration, you can use social engagement data to nurture the right people, with the right content, at the right time.

[7] The Telegraph: Is your daily social media usage higher than average?
[8] International Data Corporation: Social Buying Study

Nurture the Right People

With the wealth of social engagement provided by Oktopost, you can nurture the most relevant leads in Marketo. There are several ways to do this. One of the most efficient ways is by setting up Streams. Streams are pools of email content that are used to nurture leads, as shown below:



You can set up rules and criteria to determine:

1. **The Stream that leads should be placed in**
2. **The way leads move between Streams**

When deciding on which leads go into which stream, you might choose to use 'Interesting Moments'. An 'Interesting Moment' is a customizable set of criteria, for example, different content topics that leads engage with on social media.

Once this Interesting Moment gets triggered – in other words, a prospect meets the specified criteria – they are placed into the relevant Stream. Therefore, you can define how relevant or valuable leads are based on their social media activity. The more information you have, the more effective you can be at segmenting and engaging leads with the most relevant content.

Nurture with the Right Content

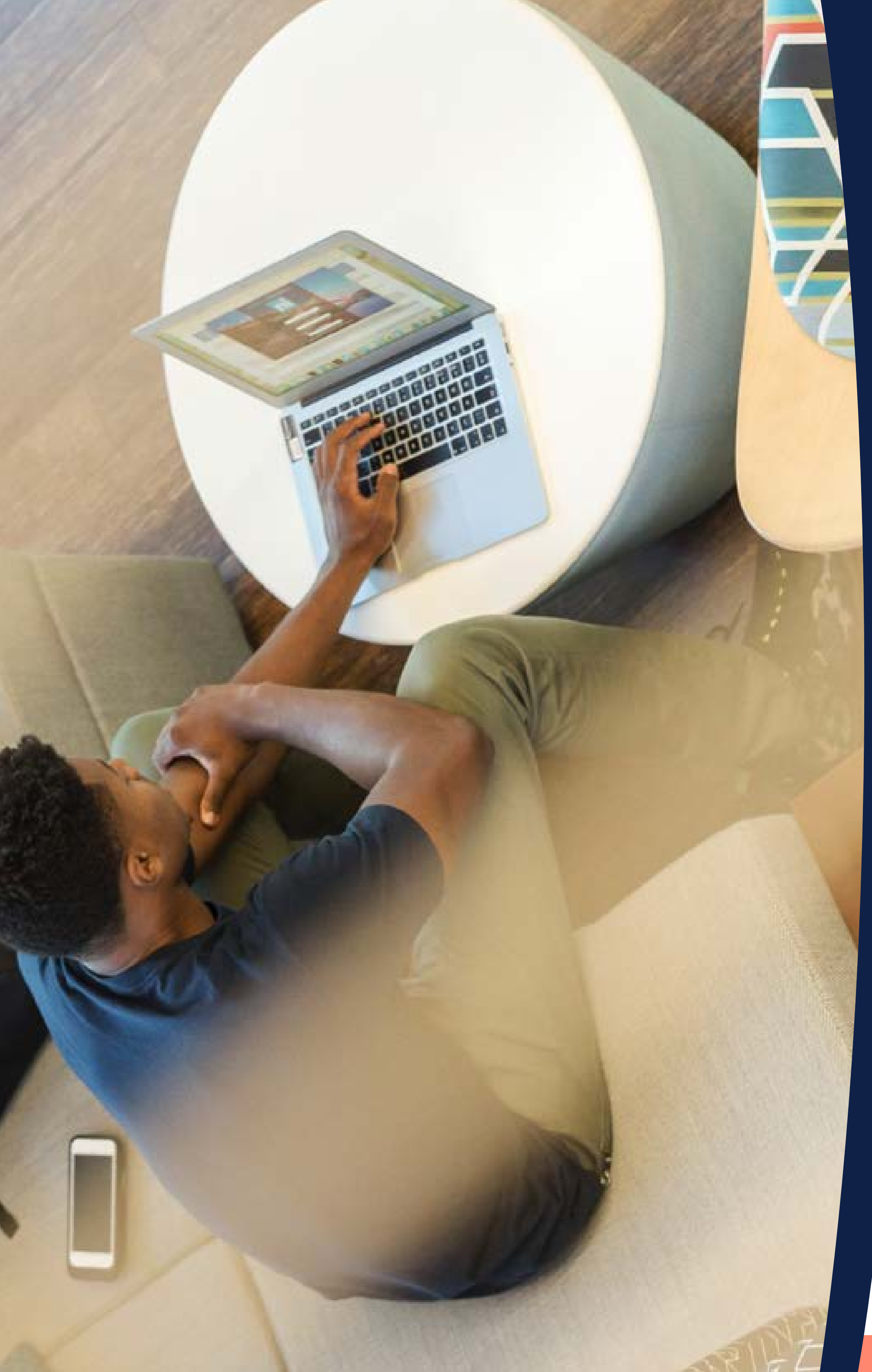
Using Marketo Streams, you can nurture leads with highly personalized email content according to their social media behavior. Below are two ways of implementing this into your workflow.

Social-Interest Emails

The first way is by sending interest-based email around various actions that leads take on social media.
For example, you can have multiple versions of the same monthly newsletter – each one pertaining to a different content topic that your leads engaged with.

For instance, imagine that a known lead clicks on a LinkedIn post that goes to a third-party thought leadership article on Topic A. With a social-interest campaign, the same individual will automatically receive more relevant content pertaining to Topic A. However, if a week later, the same known lead clicks on a Tweet that goes to a YouTube video, the social-interest campaign will send them content about Topic B. In this sense, leads can jump between different nurturing programs based on the topics they engaged with on social.

In using social engagement data for their own lead nurturing, SaaS companies have found that over the course of a month, real-time social-interest emails generate 2X the click-through rates than a typical nurturing emails (meaning, emails that don't take into account social engagement). Open-rates on these emails are also 50% higher than typical nurture emails.



Personalized Sales Outreach

When it comes to lead nurturing, marketers are not the only ones to benefit from social engagement. Alternatively, sales reps can leverage social engagement to personalize their conversations with prospects, at scale. If a sales rep is unaware of a prospect's social media activity, they lack valuable information needed to communicate effectively, and ultimately, to close a deal.

There are two approaches to facilitate personalized sales outreach:

1. Alerting Sales of Relevant Social Actions

Whenever a lead takes a relevant social action – whether it's clicking or converting from one of your posts – you can trigger a Marketo campaign, which pushes this data to your sales reps via Marketo Sales Insights in Salesforce.

After being notified of this social activity, sales reps can use this data to create hyper-relevant outreach emails. For example, SDR teams can mention relevant tweets (that prospects engaged with) inside their emails, including light call-to-actions.

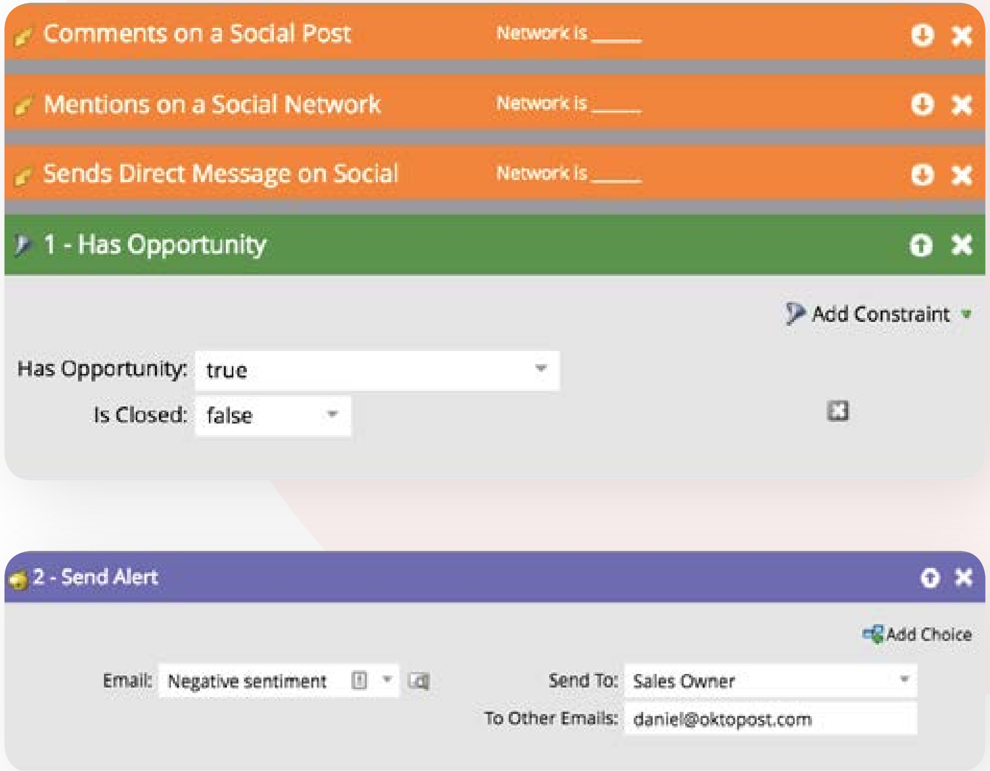
Referencing social actions in emails doubles the SDR's response-rate, allowing them to schedule more monthly appointments.

Whether you choose to send interest-based on sales-personalized emails, taking into consideration a lead's social activity ensures that you're nurturing them with the most relevant content, which makes for a very meaningful relationship.

2. Capturing Negative Sentiment in Real-Time

In any B2B sales cycle, knowledge equals power. That's why, sales professionals need to keep a constant pulse on their prospects' activity across all social media channels to understand their state of mind.

Oktopost's AI-powered social listening tool constantly monitors and analyzes audience interactions (direct messages, comments, and mentions) across the various networks to surface negative or positive sentiment. By integrating these social signals into Marketo, you can create an automated workflow, which alerts the relevant team members (sales, support, customer success, etc.), in real-time, of a person's negative sentiment. This way, the respective team member can promptly follow-up with the individual, turning a negative experience into a positive one.



Nurture at the Right Time

Catching leads at the best time during the buying cycle is another important element of lead nurturing. Using Marketo's Interesting Moments, you can deliver relevant emails to leads according to their social media interactions. For example, you may define an Interesting Moment as: "lead clicks social posts 3 times in the past week". For your company, this specific interaction indicates an active prospect who's highly interesting in your company's offering.

Any time a prospect follows this path of interaction, Marketo will trigger a red flag, alerting your sales representatives of this activity inside Salesforce Insights. Being notified of a lead's social activity prompts sales reps to deliver personalized emails, which are delivered at the most convenient and appropriate time.

03

CHAPTER

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Lead Scoring with **Social Engagement**

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What is Lead Scoring

Long gone are the days where you garner a lead and automatically pass it to sales. With less than 25% of leads being sales-ready when they first come in [9], how do you know when it's time for a sales rep to contact them? At what point is a lead defined as "sales-ready"?

B2B marketing departments have spent a great deal of time and resources answering these questions. With lead scoring, marketers can identify which leads can be pushed to sales and which leads require further nurturing.

Lead scoring is not a marketing-only methodology, rather a shared process for marketing and sales practitioners, which is vital to top-line revenue growth. Both teams can work together to use 'scoring' as a way of prioritizing leads based on their buying cycle and fit to your business.

Scoring systems are typically implmented using simple numering (e.g. 5, 15, 20). The more data marketing and sales have on leads and prospects, the more clarity they have of their sales-readiness. **According to Marketo, a 10% increase in lead quality can translate into a 40% increase in sales productivity [9]**

[9] Marketo: The Definitive Guide to Lead Scoring

When using Marketo, all incoming leads can be scored with three basic parameters:

- **Demographics and Firmographics**. Do leads seem like a good customer-fit based on their location, company size, and industry? The closer a prospect is to your ideal customer profile, the more likely they are to close, and the higher the score they're assigned.

- **Interest.** If the lead is consistently downloading content, viewing webinars, or asking for a product demo, their interest level in your company offering is probably high. Hence, they will receive a higher score.

- **Buying Stage.** It's important to assess at what stage of the buyer's cycle the lead has reached. Some companies may not be in the position to make a purchasing decision yet, in which case, the lead will need to cycle back to marketing for further nurturing.

Using Social Engagement to Improve Lead Scoring

There's more to lead scoring than demographics, interest, and buying stage. To properly determine a lead's level of sales-readiness, it's important to understand their need for your product or service. And for that, you need to track more behavioral data.

Behavior is a very complex and multi-dimensional concept to decipher. Every second buyers are Googling, clicking, downloading, and watching content, so how do you evaluate the importance or relevance of different kinds of behaviors?

Most B2B marketers score email or website behavior as being highly relevant, such as form completions, email clicks, and white paper downloads. However, this type of activity is only one dimension of behavior. It may inform you of how qualified a prospect is, but it won't give you the full picture of a prospect's place in the buying cycle, their topics-of-interest, or how ready they are to speak to a sales rep.

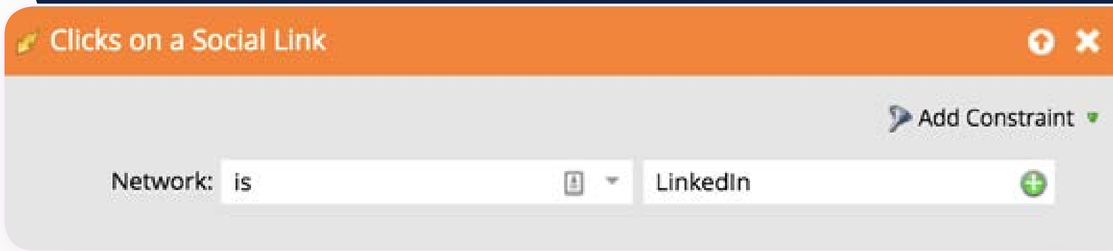
This is where social media comes in. **According to Marketo's Engagement Economy report, 35% of customer engagement happens on social media.** The added benefit of social intent data is that it offers a whole new dimension of lead behavior that can greatly improve your lead scoring model.

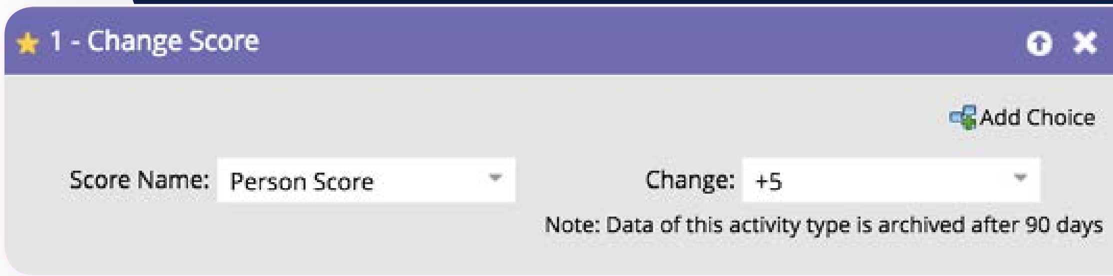
Score Leads Based on Social Network

When scoring leads based on social behavior, the first option that comes to mind is social networks – which social channels are leads coming from? And more importantly, on which channel are they most engaged on? With buyers conducting their own research and engaging with your brand on multiple social networks, it's important to understand this complex picture to increase the accuracy of the sales qualification process.

Traditionally, B2B marketers have been accrediting LinkedIn as the king of lead generation. And they're certainly not wrong! In a recent analysis Oktopost conducted on over 100,000 social posts, it was found that **80% of B2B leads came through LinkedIn, followed by Twitter (13%), Facebook (7%), and lastly, Google+ (0.2%). Additionally, 43% of B2B marketers** reported sourcing a customer from LinkedIn.

While LinkedIn appears to be leading the way as a power-tool for lead generation, what works for some B2B companies may not necessarily work for your company. Therefore, giving every lead that comes from LinkedIn 20 points and a lead that comes from Facebook and Twitter 5 points, is the easy-way-out, NOT the smartest solution.





You must extract insights from your social engagement data in order to appropriately allocate the scoring points. In doing so, you might discover that the majority of sale-ready leads click your Facebook posts before requesting a demo. Based on this data, you would infer that Facebook leads are more inclined to find solutions in your space, and given this information, you would give them more weight in the scoring algorithm compared to LinkedIn or Twitter leads.

Score Leads Based on Content Topics & Types

Lead quality and sales-readiness cannot be solely determined by the social network that leads engaged with. You must take other social behaviors into consideration, including the content topics and types that drove leads to click and convert. Examples of scoring leads based on content topic and type are demonstrated below.

Single-disciplined vs. Multi-disciplined Behavior

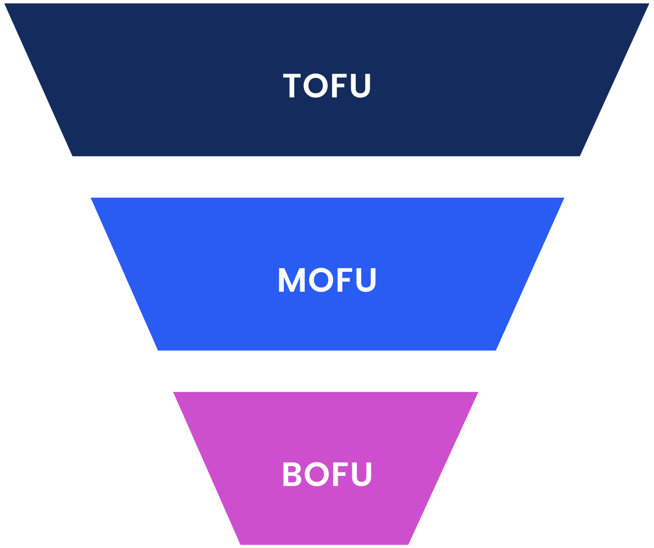
Single-disciplined behavior refers to leads who engaged with one content topic, whereas multi-disciplined behavior refers to leads who engaged with numerous content topics.

In other words, someone who constantly engages with the same topic over and over again, might be looking for a specific solution that you offer. On the other hand, someone who views and interacts with a combination of topics, may be looking at a broad spectrum of solutions. As such, it would be more difficult for you to determine their current level of interest or customer fit.

Given this knowledge, it would make sense to increase a prospect's score if they engage in single-disciplined behavior as opposed to decreasing their score if they engage in multi-disciplined behavior.

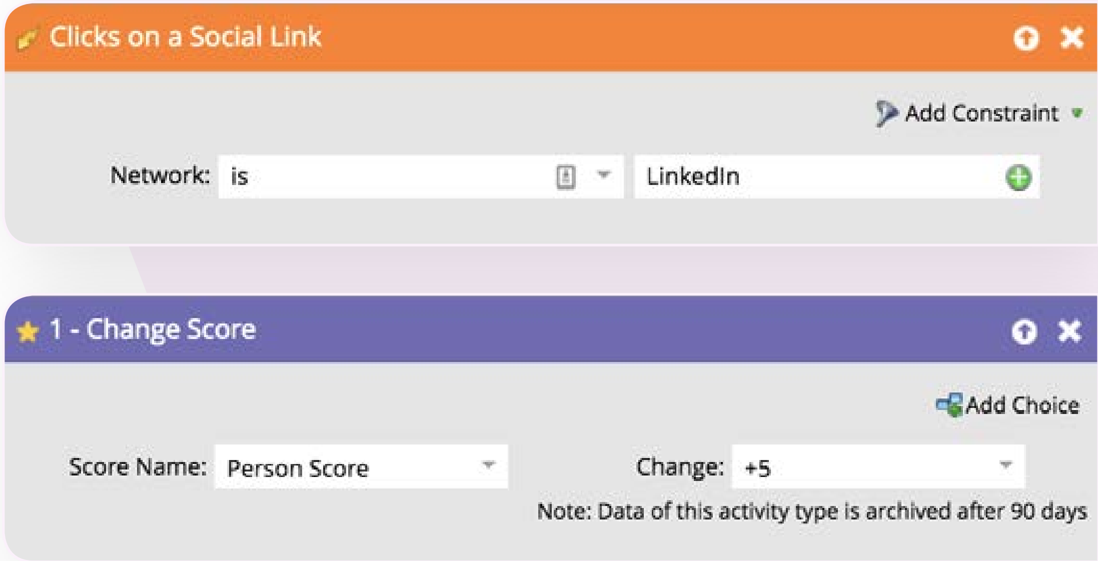
Buying Stage

A lead's behavior with your brand content reflects their buying stage. Scoring for buying stage helps determine where a buyer is within the sales cycle – namely, are they engaging with top, middle, or bottom of the funnel content.



- **TOFU (top of the funnel):** Represents a larger pool of audiences who typically engage with blog posts, videos, and infographics that build brand awareness.
- **MOFU (middle of the funnel):** Buyers engage with more advanced educational materials that use the company's solutions to address their needs and challenges. These typically come in form of eBooks, and webinars.
- **BOFU (bottom of the funnel):** Represents "hot leads" who are more interested in content that positions the company as the 'best solution out there', for example pricing pages, product demos, and customer case studies.

Increase or decrease scores according to a lead's buying stage. Leads engaging on social media with product demos or customer case studies should be attached a higher score than leads engaging with blog articles. This ensures that only quality leads are being fast-tracked to sales.



Score Leads Based on Activity

A lead may be extremely active on your social channels, but super inactive on your website – does that mean they're any less interested in your product or service? The more you understand your buyers' actions across multiple channels, including social media, the faster you can move a prospect from pre-qualified to an actual opportunity.

Without social engagement, you may assume that potential buyers are uninterested, and as such, give them a negative score. This blindspot is detrimental to your scoring model because it misinforms you of a lead's sales-readiness. To prevent this, there are two common ways of scoring leads based on social engagement: **engagement type or engagement frequency.**

Engagement Type

Engagement type refers to a lead's specific social media activity – for example:

- Liking a post
- Tweeting a post
- Mentioning a company's handle
- Sharing a post
- Clicking a post
- Converting via a post

Since engagement types like shares and likes can be taken by leads at any stage of the buyer journey (or more specifically, towards t he beginning of the funnel), they may be given a lower score. In this case, the low score indicates low interest and the need for further nurturing. In contrast, engagement types like clicks and conversions inform us of "mature leads" who are far more ripe to take the next step in the sales cycle.

Engagement Frequency

Alternatively, you can use social engagement to score a lead based on frequency threshold. How often a lead interacts with your social channels and content says a lot about how interested they are in purchasing from your company. Are leads that click on your LinkedIn posts 15 times more likely to close than leads that only engage with your content every 5 months? If so, bump up their score!

Any type of repeated action on social media serves as good indication of someone whose interest has been captivated and who would happily speak to a salesperson. Similarly, if a lead has been completely inactive for a certain timeframe (such as 3 months), it's a good idea to deduct from their score to indicate a decay in engagement. At this point, your lead nurturing program should only focus on leads with a high score, and thus, a high engagement.

CHAPTER

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Lead Attribution with **Social Engagement**

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What is Lead Attribution

In Marketo, lead attribution is used to credit programs that helped drive pipeline and sales revenue. If you use the Marketo modeler, attribution can also give credit to moving someone forward in your business model. Marketo offers two lead attribution models:

1. **First Touch Attribution:** answers a simple business question, "Which programs are good at acquiring profitable new names?"

2. **Multi-Touch Attribution:** answers a complicated business question, "Which programs are most influential in moving people forward in the sales cycle over time?"

In both the first touch and multi-touch models, the following rules must be met:

1. Credit is split evenly
2. You can't give more credit than you earned
3. You can't give credit for something that happened in the past

How Social Engagement Influences your Attribution Model

Social media plays a critical role across the entire lead lifecycle. It's both a first-touch acquisition source and an influencing factor throughout the buyer's journey. People learn about your brand through Google searches, but also interact with your brand directly on social media. Therefore, no matter the attribution model you choose to build – multiple-touch, first-touch, or last-touch – social media should be represented for a complete picture of the buyer journey.

The biggest problem is that most B2B marketers only track top-of-funnel activities like traffic and click-through rates on social media, without considering the real revenue of social networks. This is because marketers often view social media solely as a brand awareness tool, when they should be viewing it as an engagement channel, where conversations start and education continues.

A lead can go from clicking on a social post to viewing your webinar, to watching a product demonstration. Shortly after watching a product demo, the lead speaks with one of your sales reps, an opportunity is created, and one month later, they become a new customer.

In a world where social engagement is ignored, 100% of revenue would be credited back to the webinar. But is this realistic? No. Let's take a look at the following study.

Study on SaaS Companies

Lacking critical social insights, B2B marketing teams typically attribute 4% of MQLs to the wrong source. While 4% seems insignificant, imagine that these are thousands of leads being credited to email or website, when in fact, they came through social channels.

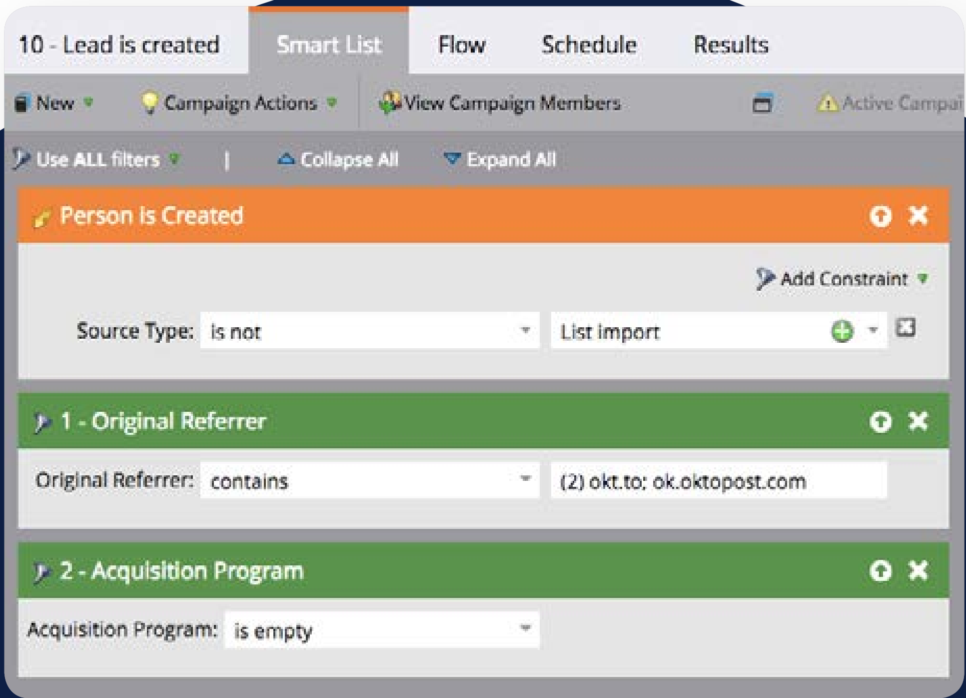
By integrating Marketo with Oktopost, we have found that 24.9% of B2B buyers take relevant social actions each month – actions like clicking, liking, and converting from a post.

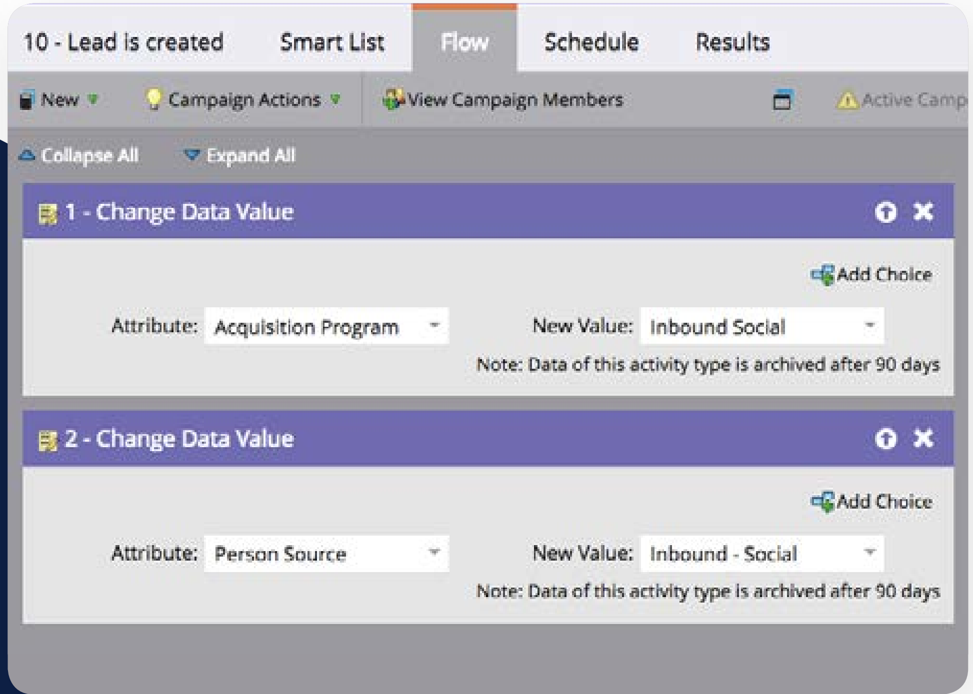
With these numbers in mind, B2B marketers understand the impact of social on their conversion rates and are able to shift the way they allocate resources within the marketing team, giving more weight (about a quarter of their budget and time) to social media.

First-Touch Attribution with Social Engagement

The key to a successful attribution model is to understand all of the contributing factors and sources that drive conversions throughout the funnel. After all, not all page views or marketing channels are treated equally when it comes to conversions.

In the example shown below, a first-touch attribution program has been set up to capture leads whose first interaction with the brand was on social media. The first time a user clicks on an ok.to link, the Marketo pixel is triggered, and the Original Referrer (a.k.a initial touch point) will appear as 'Inbound – Social Media' (although it can follow any naming convention that you decide).





To put this into context, imagine the following scenario: A new contact clicks on a LinkedIn post, which then leads them to fill out a webinar registration form, and two days later, drives them to speak to a sales representative. In this scenario, although multiple actions were taken, only social media will be credited for acquiring the new lead.

With the new layer of social engagement data in Marketo, you can accurately give credit social media interactions that helped in driving pipeline growth. It also gives you the opportunity to properly analyze the social media path (e.g. clicking a social link, sending a direct message, retweeting, etc.) that led to a particular conversation on your website, and figure out ways to improve your results.

CHAPTER

05

05

Lead Segmentation with **Social Engagement**

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What is Lead Segmentation

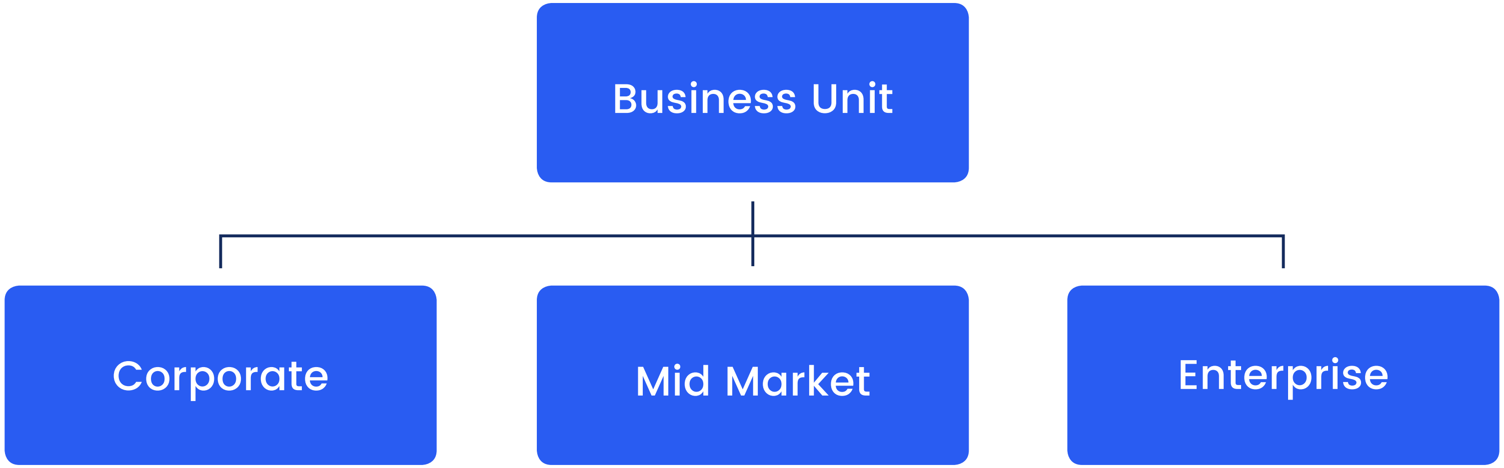
In the Engagement Economy, there is no such thing as 'one size fits-all'. A person in an executive role, for example, requires a different piece of content than someone in a junior role. It's all about delivering a customized experience to every single individual. For this reason, Marketo allows you to segment your lead database, and use these segments to create dynamic content.

Marketo offers 9 different types of variables to segment your database so marketers can properly engage with their audiences.

Segments

- Geography
- Language Preference
- Business Unit
- Role
- Stage
- Interest
- Verticals
- Competitor

Each segmentation also has several sub-segments underneath it. Let's say you've been segmented by a Business Unit variable. Marketo would classify you as either a Small Business (0-300 people), Mid-Market (301-1,500), or Enterprise (1,500+).



The more data you have, the more effective you can be at segmenting your database and delivering engaging content. So, let's get personal! In the next section, we'll zero in on Marketo's Interest segment, and how B2B marketers can leverage social engagement to provide a more personalized content experience.

Using 'Social Interests' to Segment Leads

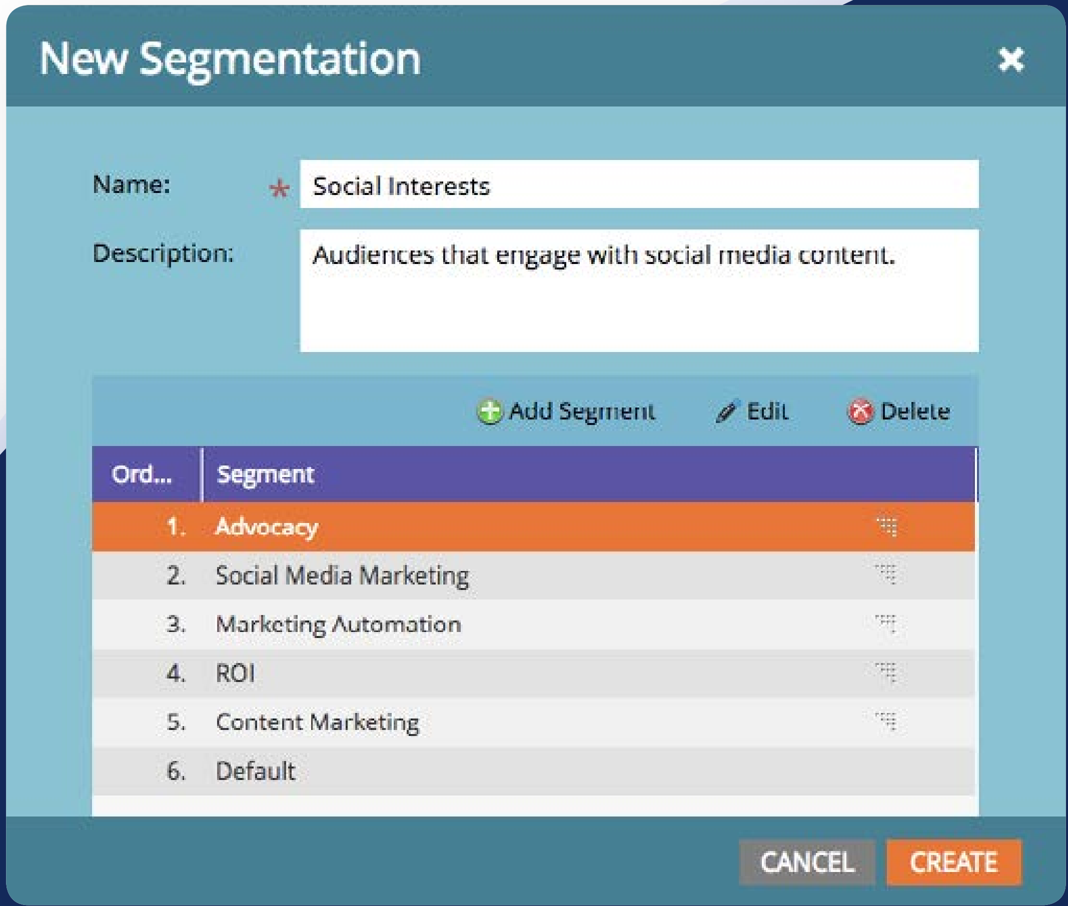
Your audience engages with your brand on social and clicks on posts they find interesting. But are you leveraging this activity to deliver personalized experiences?

By connecting Oktopost's social engagement data with Marketo, you can build sophisticated segments based on what your audience clicks on social media, and customize content accordingly.

Let's take an example. At Oktopost, we have 5 key content categories – employee advocacy, social media marketing, ROI, marketing automation, and content marketing. Any time a lead frequently clicks on social posts pertaining to one of these topics, Marketo places them into a relevant segment, and thereafter, provides them with similar content.

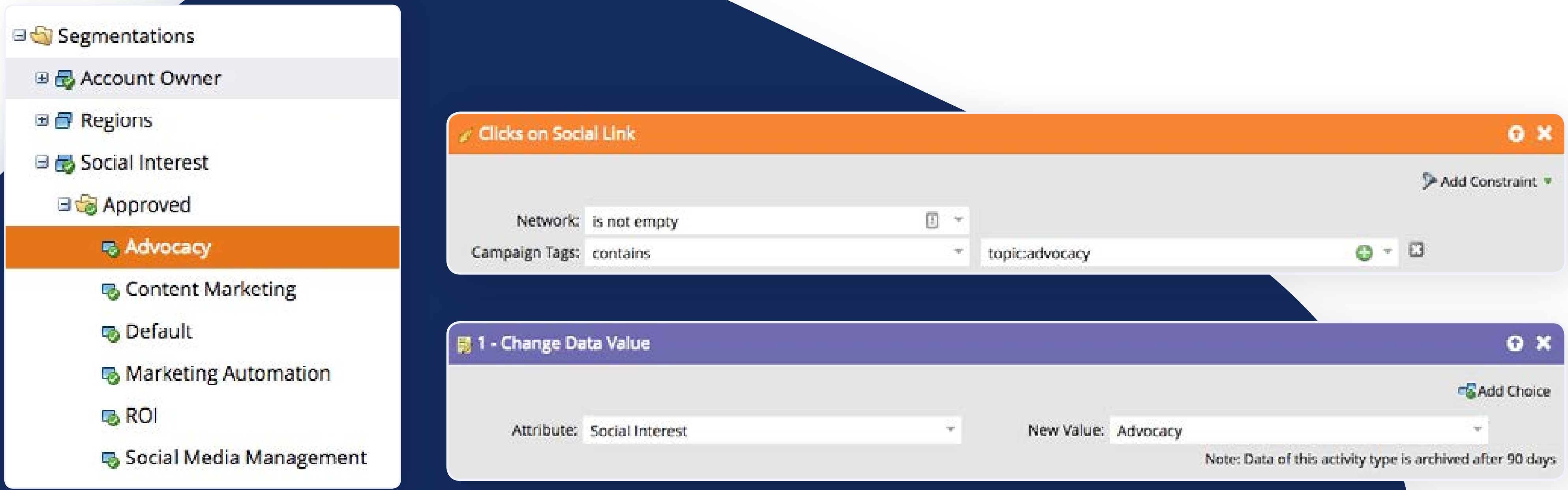
1. Create 'Social Interest' Segment

First you need to create a custom segment in Marketo called 'Social Interests', along with the sub-segments named according to your main content topics. As you can see, we've named ours: advocacy, social media marketing, ROI, marketing automation, and content marketing.



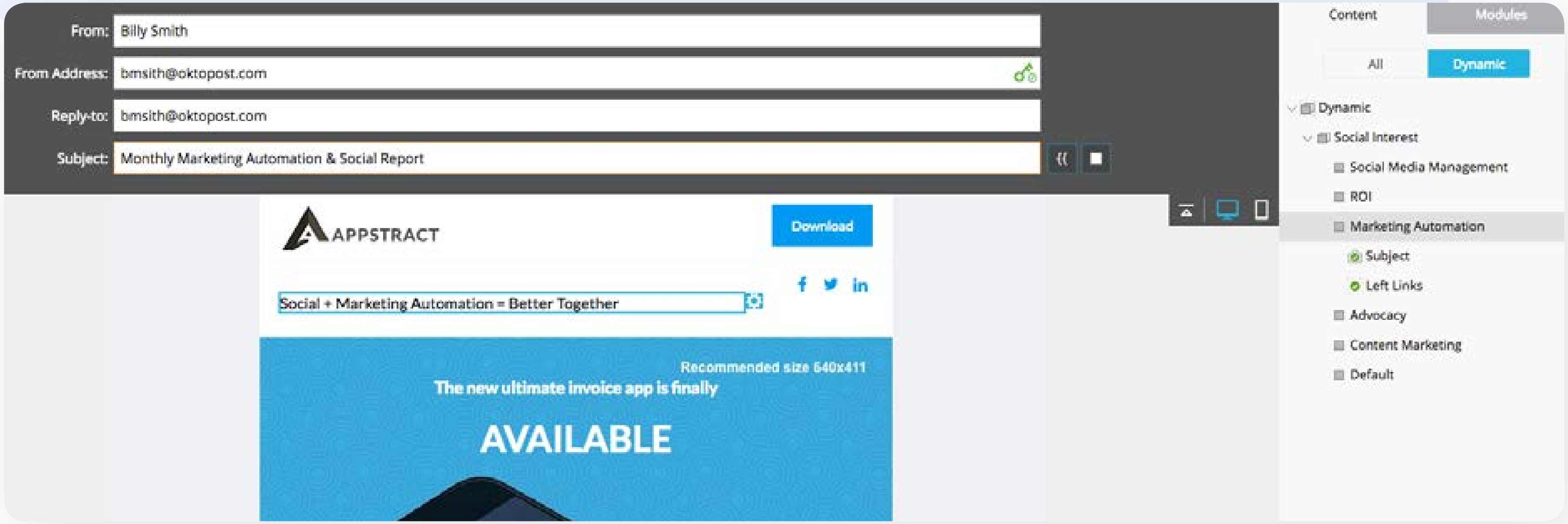
2. Define Criteria

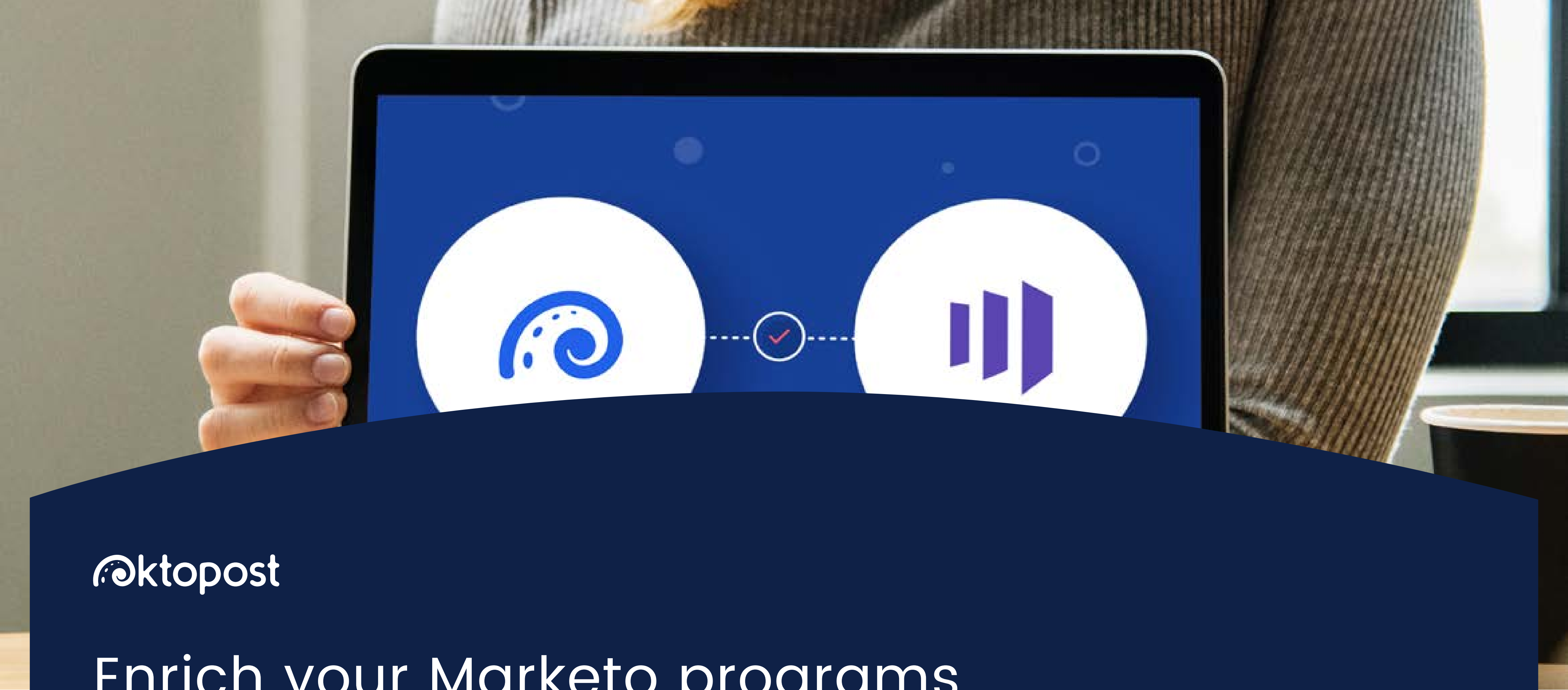
Next, you need to define the criteria for someone to be placed into this segment. In our case, we defined the ‘Trigger’ as ‘Clicks on Social Link’, and included other criteria such as ‘campaign tags’.
To put this into context, any time someone clicks on a post (regardless of network) which is tagged inside Oktopost with the topic 'advocacy', they will automatically be placed into the ‘Advocacy’ Social Interest segment.



3. Deliver Personalized Content

Instead of sending the same generic email to all of your contacts, the Social Interest segment allows you to deliver highly-targeted emails aligned with your leads' interest. For example, you can create Dynamic Content based on the segments you've built – when you send a newsletter (from Marketo), the same email can have different variations, customized to people's social interests. This level of personalization goes a long way in increasing content visibility and lead engagement.





Oktopost

Enrich your Marketo programs with **social engagement**

Discover how leading B2B marketing teams are leveraging Oktopost's social engagement data to better manage, target, and convert leads in Marketo.

Request a demo