



## Health Check



The Revenue Marketing Agency™

# The TPG Marketo Health Check – your roadmap to an optimized platform

Feature enhancements, personnel and process changes, and a constant influx of data can make maintaining the health of your Marketo instance a tricky proposition. The Marketo Health Check is a comprehensive performance audit of your marketing automation processes. It includes the technical set up of Marketo and its integration with CRM, benchmarking against Marketo best practices, and lead management process integration with Marketo.

This diagnostic engagement is an in-depth visual and functional analysis of your use of Marketo, which also examines your adherence to known best practices.

But, what makes our Marketo Health Check different? It's not just about your systems. We also conduct a series of interviews with key stakeholders to gauge marketing and sales alignment, adoption of the tool and identify potential skills gaps. You benefit from our experience with hundreds of Marketo instances and comparison to best-in-class implementations.

The comprehensive diagnostic gives you not only quick wins you can implement immediately, but also a plan for additional process improvements with a 30-, 60- and 90-day plan. The outcome is your roadmap for a healthy, growing Marketo instance that drives more business for your company and increases your ROI from marketing automation.

## Key Benefits & Deliverables

- Actionable reports for your executive, managerial and tactical levels
- The ability to make data-driven decisions based on performance
- Strategic concepts around reporting and metrics
- Documentation of your new reports

## Our Credentials Include

- 2012, 2013 and 2014 Marketo Partner Excellence Award
- Our clients have won 19 Marketo Revvie Awards 2012-2015
- Our team includes Marketo Certified Consultants as well as certified Salesforce.com admins



## Our Approach

Our Marketo Certified Consultants examine your Marketo instance as well as its integration with CRM (if applicable) using both a qualitative and quantitative approach to analyze how your Marketo system is performing against best practices. The Health Check is a deep dive into the systems and processes that enable you to get more out of your investment in Marketo—and see the benefit to your bottom line.

*“Their work in the application, solutions proposed, and ability to interpret our needs and provide actionable recommendations made TPG an invaluable member of our team.”*

– Janel Ahrens, Senior Director of Global Marketing, EVault



## Health Check Components

*“The TPG team is amazing. They gave us not just an organized spreadsheet with every task detailed, but they gave hand-to-hand guidance.”*

– Esti Levi, Marketing Specialist, Cloudshare



- **Marketing Automation & CRM Review** – Includes platform deployment, synchronization and configuration. Also includes a high level review of how Marketo is integrated with major CRM platforms (if applicable).
- **Campaign Management Review** – Includes lead nurturing, lead scoring, lead routing, and sales enablement.

- **Email Review** – Includes layout and design, templates, and email deliverability.
- **Landing Page Review** – Includes landing page layout and design, calls-to-action, and implementation of best practices for form conversions.
- **Marketing Database Review** – Includes analysis of record completeness and overall data quality with regards to client goals.
- **Interviews** – Includes power users and key stakeholders to help understand the usage of Marketo and how it integrates with CRM.
- **Reporting & Analytics** – Analyze data for integrity. Standardize reports and subscriptions.
- **Follow Up** – Prioritize and present key recommendations and findings.



**PEDOWITZ**  
GROUP

