Best Practices

CRM, MAS and UTM Structure

terminus

Resource Contents

Section One

MAS and CRM Campaign Structure Best Practices

Basic Setup & Terminology

Introduction to MAS and CRM

Enabling a 1:1 Sync

As you think about your tech stack, two critical systems of record will likely come to mind - your Marketing Automation System (MAS) and your Client Relationship Management System (CRM). This resource will review how to work toward data structure and best practices for optimal reporting and hygiene across systems.

First things first, as a **best practice**, we recommend enabling a **one-to-one sync from your MAS to your CRM when it comes to marketing activities**. Any activity that is set up in your MAS should have a matching record in your CRM system with a unique identifier to match that single activity across both systems. For example, if you leverage Marketo and Salesforce, any Program created in Marketo should be synced to a corresponding Campaign in Salesforce.

Next, let's align on terminology.

Terminology Review

Alignment Across Systems

When thinking about the records for various marketing activities, we thought a visual may provide the best clarity around the nomenclature you'll encounter both throughout this resource and in the Terminus platform.

Don't worry, you'll only be creating **one record for a single marketing engagement**, remember, *we recommend a 1:1 sync from your MAS to CRM*.

Marketing Engagements recorded in your MAS and CRM are referred to as *Campaigns* in the Terminus Hub.

One Marketing Engagement, e.g. Webinar

MAS Classification	CRM Classification
Marketo Program	SFDC Campaign
Eloqua Campaign	Dynamics Campaign
Hubspot Campaign	

Terminus Hub Classification: Campaign

Classifying Marketing Engagements

Campaign & Program Types

We recommend using a single field to group "like" engagements in your systems. The default field in SFDC is *Campaign Type*. By default, the Terminus platform will read from this field.

The **best practice** is to record individual marketing engagements in your Marketing Automation and CRM systems **only** as they align to individual **calls to action, offers or live interactions**.*

In order to easily manage your campaigns, we also recommend limiting the potential campaign types to 10 - 25 values. When you determine the types needed for your business here is some additional guidance. Each campaign created within a type should be a group of marketing activities that could be compared to one another, apples to apples. And, the number of unique campaigns within each type should be worth measuring both as a group of activities overall and individually as campaigns within the types, either based on budget spent or quantity. For example, if you only create three ebooks per year, it may be best to combine those ebooks with whitepapers and analyst reports in a "content" campaign type.

If additional layers of granularity are needed, capture those in a SubType picklist field.

*See the UTM Best Practice section for how to set up digital tracking through UTMs.

Common Campaign Types

- Content
- White Paper
- Ebook
- Analyst Report
- Software Trial
- Resources
- Contact Us Forms
- Demo Requests
- Webinar
- Third Party Webinar
- Conference
- Hosted Event
- Tradeshow
- Roadshow
- Direct Mail

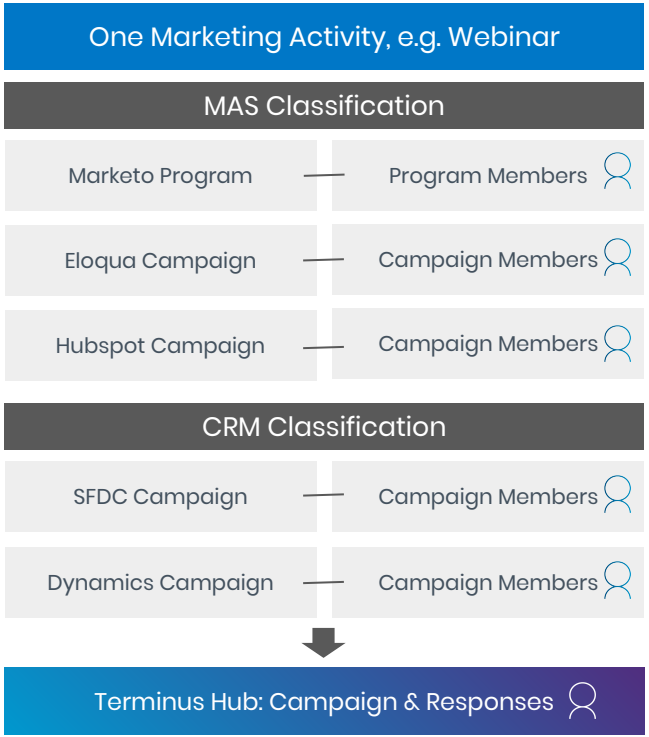
Recording Individual Marketing Activities

Campaign Deep Dive

When you create a record for a marketing activity, you can include several key pieces of information in addition to the specific activity name and the corresponding activity type. First, you can capture the names and contact information of the people who participate in an activity. Then, you'll document the various engagements each person has with an activity over time.

Depending on the marketing activity, the way people are recorded as participants and the engagements those participants could have with each activity will vary. *A successful engagement with one person should only be recorded one time in a single corresponding marketing activity record.* For example, registered and attended may both constitute a success for a webinar, but you wouldn't count each status change as a separate response.

We'll break down more detail over the next few slides.



Recording Individual Marketing Activities

Capturing Successful Marketing Influence by Statuses

When setting up an individual activity record, or campaign, you can also determine the various actions, or engagements that campaign members can take as part of a given activity. In a Salesforce campaign, this is called a *Status*.

For example, if you're creating a campaign for a webinar, the various statuses may be: invited, registered, attended, and viewed-on-demand. **Not all statuses are created equal.** As a **best practice**, statuses that indicate someone has *taken an action* with your organization's marketing such as attending a webinar, downloading a whitepaper, or attending an executive dinner, should be marked as a **responded** status in an SFDC campaign, or a program **success** in Marketo.

We also *strongly recommend* creating a template for each campaign type that includes the corresponding statuses and responded flags. This will ensure consistency in measuring engagement across all campaigns by type.

Recording Individual Marketing Activities

Examples of Marketing Activity Records & Statuses

Web Form - Request A Demo

Campaign Members are only added to a campaign record when they complete a web form.

Only one status is needed because only one engagement is possible.

Possible Status Options:
- Filled out Form ✓

Hosted Event

Campaign Members are added to the campaign at the time of creation because the invite list is known.

Various statuses are needed to determine if an individual is engaging with this campaign.

Possible Status Options:
- Invited
- Registered
- Attended ✓
- ✓

E-Book Email Promotion

Campaign Members are added at the time of creation because the target recipients are known.

Various statuses are needed to determine if an individual is engaging with this campaign.

Possible Status Options:
- Sent
- Opened
- Downloaded ✓

✓ Indicates that a Campaign Status is marked as a Responded or that a Program Status is marked as a Success. Remember, you can choose what your organization considers a success by campaign type.

Structure and Nomenclature

Keep it Simple

Create a structure that's clean and easy to maintain. Determine the basic characteristics that will provide the necessary information for your team to easily identify and differentiate a marketing activity from another. Anything else is probably unnecessary work, and a challenge to enforce over time.

Example Naming Structure:

Parent Campaign = Parent Campaign Name
Campaign Type = Campaign Type Name
Specific Campaign Name = (Campaign Run Date) Specific Campaign Name (Campaign Type) (Region)

Leverage the *Parent Campaign* to roll up multiple activities across different types. Another way to think of a Parent Campaign is as the overarching initiative. The *Campaign Type* should be used to group like activities. And the *Specific Campaign Name* should tell you more detail. The additional values in (parentheses) are optional and can be added to your structure if you need granular detail in the campaign name.

If you would like to segment your campaigns by any of the values in the (parenthesis), these values should be captured in fields on the campaign.

Structure and Nomenclature

Examples of Campaign Structure and Nomenclature

Parent Campaign Name	Campaign Type	Specific Campaign Name	Custom Field: Industry Vertical
Dreamforce 2023	Hosted Event	Prospect Executive Dreamforce Dinner	Information Technology
Dreamforce 2023	Direct Mail	Join Us at Dreamforce Mailer	(none)
(none)	Webinar	How Acme Leverages Our Platform	(none)
Finance Product Launch	White Paper	Transform Financial Reporting Whitepaper	Financial Services

Not all marketing activities, or campaigns, will roll into a specific initiative, or *Parent Campaign*, so that field can be optional. For optimal results in reporting and organization, every campaign should have an associated *Campaign Type*. The **best practice** is to require a *Campaign Type* on each newly created campaign.

Section Two

UTM Structure Best Practices

Structuring your UTM parameters.

Consistency is Key

UTM parameters allow you to track the success of individual digital campaigns. Our recommendations around tracking your digital efforts rely on using a consistent UTM structure. The good news is that our Best Practice for UTMs is to leverage UTM Medium, UTM Source, UTM Campaign and UTM content, which are the same terms **Google Analytics suggests (resource linked)**. Here are definitions of the most commonly used UTM tags:

- **UTM Medium** - tag that can be thought of as a way to group specific channels together by type. You can use the example UTM code below to track all traffic coming from similar channels, **example mediums** include: Social, CPC, display, search, email, or syndication etc.

- **UTM Source** - tag that can identify a specific website or partner *sourcing* traffic to your digital properties. **Example Sources** include: Facebook, LinkedIn, Terminus, Google AdWords, Taboola etc.

- **UTM Campaign** - tags used to group all of the content or individual ads from a specific outreach or digital effort. **Example Campaigns**: Name of a Promotion, Product Launch, or upcoming event.

- **UTM Content** - tag to track the specific of content or various ads that point to the same destination from a common source and medium. It's often used when two identical links direct traffic from the same page. **Example Content:** Red Logo Left, Banner.

Structuring your UTM parameters.

Examples of a UTM Structure

UTM Medium	UTM Source	UTM Campaign	UTM Content
PPC	AdWords	WhitepaperPromo	bluelogoleft
PaidSocial	LinkedIn	DefinitiveGuide	sidebarlink
Email	HubSpot	EventRegistration	---
Display	Terminus	ABMPlatform	more-than-just-ads

BONUS: Leverage this template UTM generator to create consistent UTM creation within your organization.

Tracking UTMs for Granular Insights.

Digital Analytics and CRM Tracking

Digital marketing is an important part of any marketing program. Once you have a UTM structure in place, you’ve set yourself up to better understand how various digital sources are driving impressions, traffic and conversions.

Every business has differing needs when it comes to the granularity of marketing performance data. Based on your use case, we’ll suggest a few options to consider when measuring your digital efforts.

Tracking UTMs for Granular Insights.

Digital Analytics and CRM Tracking

Digital Program Optimization & Reporting

As a digital marketer looking to understand which channels and tactics are meeting and exceeding your Impression, Click, CPC, or CPM goals, we recommend leveraging a digital measurement tool such as Google Analytics, Adobe Analytics and your various individual digital ad platforms.

Holistic Marketing Optimization & Cross-functional Reporting

As a marketing operations manager responsible for reporting deep analytics across all marketing efforts to report cross-functionally and compare digital channels in one place, we'd recommend stamping UTM conversion data on your SFDC Campaign members.

The Philosophy Against SFDC Campaigns for Channel Performance tracking.

As a **best practice**, we do not recommend creating SFDC campaigns for various digital channels - let's break down why.

Initially it's the easier set up - you can automate a flow so that individuals who converted from a specific channel are pushed into unique programs or campaigns based on channel.

As your organization grows and the marketing efforts with it, this approach becomes really painful at scale. The amount of programs and campaigns that end up being created and maintained is large, resulting in a lot of manual campaign management and manual measurement.

Additionally, the volume of campaigns creates so many various campaigns that you're not able to easily understand your efforts grouped by channel or grouped by asset.

The Philosophy Against SFDC Campaigns for Channel Performance tracking, continued.

Tracking both channels and assets as campaigns results in overcounting marketing influence because the single marketing engagement that occurs will be measured twice, once for the channel conversion event and once for the offer accepted, eg. consuming a whitepaper, registering for an event or attending a webinar.

In the example of the Terminus platform below, if LinkedIn is the channel driving to conversion to either the blog or a webinar, those touches, that represent one engagement, are counted as marketing influence twice because the person who takes the action will be added as campaign members to both the channel and asset.

Campaign Types 7 | All Campaigns 31 | Visual

Search Campaign Types

	Campaign Type	People Influenced	Accounts Influenced	Opptys Influenced	Deals Influenced	Pipeline Influenced
+	Blog	310	65	34	0	$19,561,274
+	Webinar	255	64	20	0	$14,192,829
	LinkedIn	274	75	31	0	$16,312,135

The Philosophy Against SFDC Campaigns for Channel Performance tracking, concluded.

Our **best practice** was designed for operational excellence across all systems, saving you time and energy for the long term. Although creating the workflow to stamp campaign members with their conversion channel data is a bit more effort up front, it will be worth it as your marketing efforts scale.

The result is a simplified campaign architecture, resulting in less time spent managing a cumbersome campaign structure and more time spent analyzing and optimizing your team's efforts.

Section Three

MAS, CRM, UTMs + Terminus Hub

Most Common Configurations

Understanding Your Data and Terminus

Maintaining a Single Source of Truth

The Terminus platform is a powerful place for you to leverage previously disparate datasets to enhance your account based strategies. The following pages review our most common recommendations and **best practices** when it comes to the way your data works as its brought into our platform. As a general rule, the best practices outlined in this document are designed not only to help you make the most of the Terminus platform, but also, to help you achieve *operational excellence*, streamlining data across all systems.

First, things first, it's perfectly normal to have challenges with your data hygiene. We're here to help make recommendations that fit your organization's' needs - even if that means a blended approach to your existing data and our best practices. Many of our clients follow the exact structure we've outlined, while many find it helpful as a guide for specific areas within their data architecture.

Whenever possible, we'll recommend that the data be managed or corrected at the source so that you have full ownership of the data as it exists across platforms and so that your CRM remains a single source of truth cross functionally. This means that even though in some instances we could apply custom configurations to band-aid underlying issues, your organization will have the best outcomes when the data is managed in one place.

Understanding Your Data and Terminus

Introduction to Common Configurations

The following are several common configurations that can be set up to ensure the data within the *Terminus Hub* is relevant and actionable for your team based on your existing data architecture.

1. *Terminus Campaign Type* by default will read from the CRM Campaign Type. This grouping allows you to compare campaigns that roll into the same type to other campaigns by type or all campaigns within a type.

2. *Validity Rules* can be created to manipulate the data that appears throughout the platform. An example of a common validity rule includes exclusion of campaigns or opportunities that are marked as "operational".

3. *Opportunity Lookback Periods* can be enabled to manage historical campaign influence against opportunities within the platform. A Lookback period is a rolling timeline ending at the Opportunity Creation date that "looks back" a set number of months before the opportunity creation date. Campaign member responses that occur within that timeframe will be considered influential against that opportunity. By default, we'll enable a 2-year lookback period. If you'd like to consider changing that, here's the **best practice**: we recommend a lookback period of at least 2x an average sales cycle, taking into account that most of the buying journey happens before an opportunity is created.

Understanding Your Data and Terminus

Deep Dive: Campaign Member Validity Configuration

By default, the Terminus Hub will only surface campaign influence against people, accounts, opportunities or deals based on campaign members that have a status that is marked as **responded**. This is intentionally set up this way to allow your organization to manage all of your campaign data for record keeping, and differentiate which statuses should be considered a success, or an active engagement back with your outreach. This is what we refer to as a "**response based**" configuration.

For example, if an event campaign could have campaign members with statues of: invited, registered and attended, your team can determine that you may only want to consider attendance a true marketing engagement. In this case, your team would simply need to set up the "attended" status as a **responded** status in CRM by selected the "responded" box next to the status in the campaign Setup. Setting a status as a responded status can also be done in your MAS system by setting the program status as a success - with a 1:1 sync, a MAS successful program status will translate to a CRM responded status.

As we mentioned earlier, we *strongly recommend* creating a template for each campaign type that includes the corresponding statuses and responded flags. This will ensure consistency in measuring engagement across all campaigns by type, no matter who is creating campaigns within your team.

Understanding Your Data and Terminus

Deep Dive: Campaign Member Activity Date Configuration

CRM systems track multiple dates to help marketers understand when campaign members take an action. These dates include *Campaign Member Create Date*, *Campaign First Responded Date* and *Campaign Member Activity Date*. The platform is configured to look at a single point in time of your choosing to determine when a "response" from a campaign should be surfaced as a successful marketing engagement. This date field configuration aligns to the chosen time cohorts across the platform and the responses that will be surfaced.

Best Practice: Solving for Overriding Campaign Member Activity Dates

CRM systems do not allow users to overwrite the values within the standard campaign member activity dates. This can be problematic if your team needs to change campaign member information. Examples when date changes would need to take place include: adding campaigns to SFDC that occurred in the past, or uploading a list of attendees to an event campaign after the event is over.

To solve for this, we recommend that our clients create a custom Campaign Member Date Field called *Terminus Activity Date in order* to manually edit the date the response should have occurred. Let our team know that this date is in place, and we'll write a configuration rule that looks at the *Terminus Activity Date* field, when it exists, allowing you to properly account for when marketing influence actually takes place.

Understanding Your Data and Terminus

Deep Dive: Global Filters

Global filters allow you to quickly segment the reports throughout the platform. They can be created for the following corresponding objects: *People* (which combines both Lead + Contact objects), *Opportunity*, *Campaign*, and *Account*. These filters can point to any CRM standard or custom field for quick data segmentation. On any object, there is a limit of up to 12 different filter values. If you choose to bring in any fields containing numeric values, decide how they should be set up in bands, for example: Fortune 1000 ratings may be grouped into the following filters 1-250; 251-500; 501-750; 751-1000.

It's worth noting that there are some fields that we *do not* recommend bringing into the platform, including date fields, titles, or campaign names. We advise *against* these as they contain so many unique values that the filter can become challenging to use altogether.

The following are commonly leveraged global filters by each object:

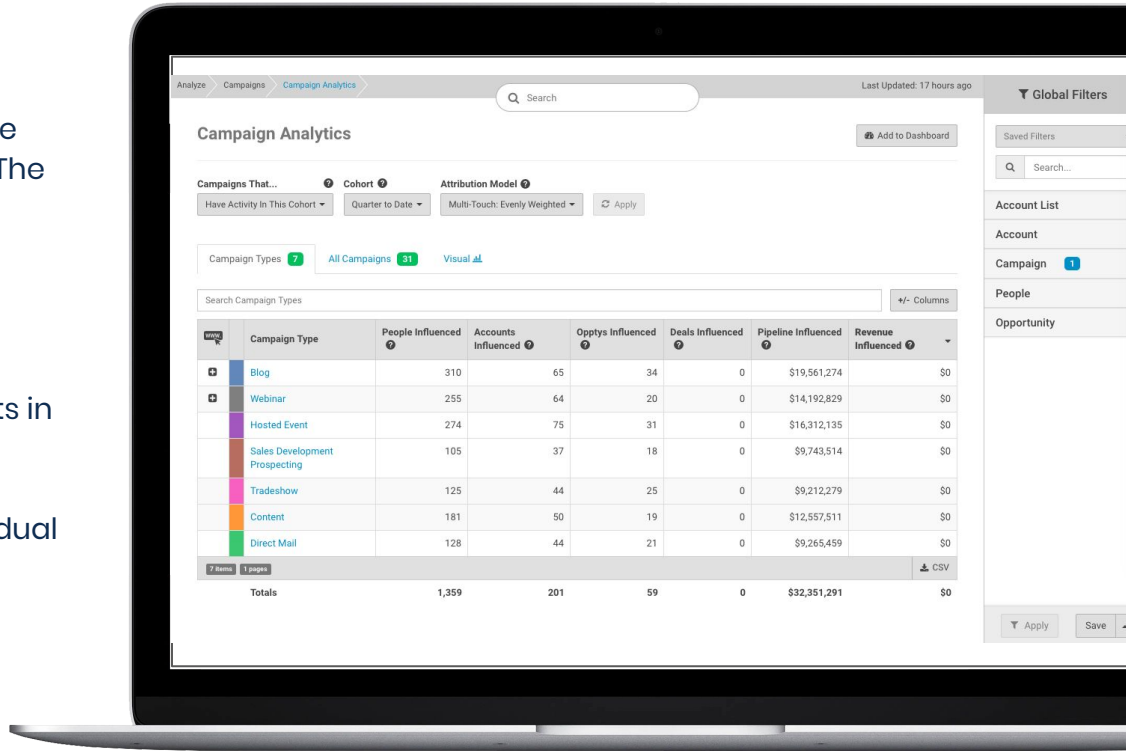
People	Account	Campaign	Opportunity
Region	Region	Parent Campaign	Region
Lead Status Record Type	Account Owner	Region	Opportunity Owner
	Industry	Campaign Owner	Opportunity Stage
	Company Size	Campaign Type	Opportunity Type
	Account Tier		

Understanding Your Data and Terminus

Deep Dive: Leveraging Global Filters for Parent Campaigns

As we suggested earlier, parent campaigns are best used to group all marketing activities by the overarching goal or event they are supporting. The global filters in the platform allow you to understand the holistic performance of all campaigns that roll into a parent.

You can see in the *example* to the right with a Parent Campaign global filter applied, the results in the table display all of the corresponding campaigns regardless of type. Choose the "All Campaigns" tab to see the name of each individual campaign that rolls into a Parent Campaign.



Campaign Type	People Influenced	Accounts Influenced	Opptys Influenced	Deals Influenced	Pipeline Influenced	Revenue Influenced
Blog	310	65	34	0	$19,561,274	$0
Webinar	255	64	20	0	$14,192,829	$0
Hosted Event	274	75	31	0	$16,312,135	$0
Sales Development Prospecting	105	37	18	0	$9,743,514	$0
Tradeshow	125	44	25	0	$9,212,279	$0
Content	181	50	19	0	$12,557,511	$0
Direct Mail	128	44	21	0	$9,265,459	$0
Totals	1,359	201	59	0	$32,351,291	$0

Understanding Your Data and Terminus

Managing Historical CRM and MAS Data

The last thing to consider if you're implementing changes to your campaign structure is your historical data. We totally understand - making a change to the way you store and manage your campaign data is a challenge, and in some instances these changes must be in phases. But, don't forget to make retroactive changes too.

If you're making significant changes to the structure of your data, it will be challenging to gauge marketing influence quarter over quarter, or year over year, in the short term without also updating some portion of your historical data. Depending on your organization's needs, we'd recommend updating a minimum of one quarter's historical data. However, the more data you can update to follow your new structure, the more immediately valuable the data in the platform will be for larger cohort analysis.

Section Four

UTMs + Terminus Advertising

Common Configurations

Viewing Terminus Sourced Traffic

Google Analytics and Marketing Automation Tracking

As mentioned previously, UTM parameters can be used to track the efficacy of individual digital campaigns. Many marketers also use UTMs to track how much web traffic their digital ad campaigns are driving back to their website.

In the Terminus advertising platform, customers can easily append their landing page URLs with custom UTMs so that Terminus-sourced traffic is visible in their marketing automation platform, and their instance of Google Analytics.

A common UTM structure for Terminus advertising may look like this:

LANDING PAGE URL: info.terminus.com/abm-platform

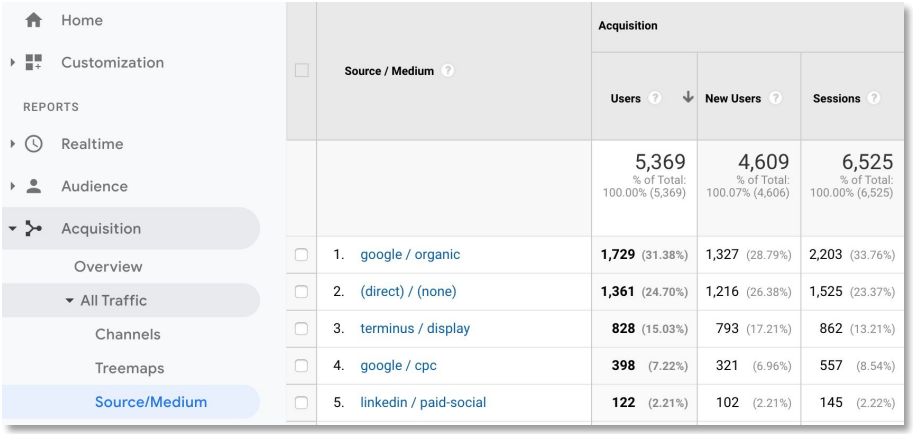
***UTM*: ?utm_source=terminus&utm_medium=display&utm_campaign=abmplatform&utm_content=more-than-just-ads**

Terminus is the referrer	The marketing medium is display advertising	Identifies the specific ad campaign	Identifies the specific ad creative set

Viewing Terminus Sourced Traffic

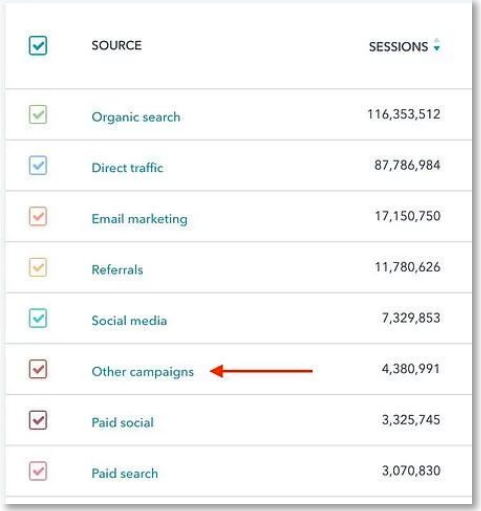
Google Analytics and Marketing Automation Tracking

When a user clicks a referral link with a Terminus UTM, the parameters are then sent to Google Analytics, and/or your marketing automation platform, and visit data can be found wherever "Source" traffic information is accessible.



Example in Google Analytics

Example in HubSpot



If you still have questions...

Visit our knowledge base to read more about how the platform works.

Reach out to our support team to make updates to your configuration or ask specific questions about the existing configuration in place for your organization.

Contact your Customer Success Manager to discuss recommendations to fit your needs.

support@terminus.com

https://support.terminus.com