
Folder Structure and Naming Conventions with Channel and Landing Page URL Structure

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1. Overview

This guide will take you through the naming convention for creating Marketo Programs. Follow the instructions for the appropriate LOB below.

The naming convention allows us to clearly distinguish between each line of business and also helps to stay organized and makes it easier to search Programs in Marketo. Being consistent on naming conventions help in gaining a birds eye view like grouping similar programs, associated campaigns and assets together and also help in reporting.

2. Adding channel in program naming convention

A channel needs be included in every program naming convention as it will help with reporting and the tracking of leads. The channel is the delivery mechanism for each program (such as Email, ON24 Webinar or LinkedIn) and is defined based on the type of program. Each program type has associated channels which have been defined by the Marketing Automation team based on input from global Marketo users. Below is a chart that lists the channels available, their associated program type, the channel short code that should now be included in each program naming convention, and usage details.

Channel	Program Type	Channel Short Code	Channel Description
Email	Email	EML	Use this channel for any email communication /program. Add " ABProgram " for any AB test campaigns
Nurture	Engagement	NUR	Use this channel when executing a Nurture program or an email campaign triggered on engagement. For ex: In an email campaign with 4 emails, select this channel only when the user receives subsequent emails based on engagement.
Event	Event	EVT	Use this channel for any type of event that is not an ON24 event.
ON24 Webinar	Event with Webinar	O24	Use this channel for any webinar hosted through ON24 webinar platform.
Zoom	Event with Webinar	ZMW	Use this channel for any webinar hosted through Zoom Webinar platform.

LinkedIn	Default	LKN	Use this channel for any lead generation campaign through LinkedIn.
3rd Party	Default	3RD	Use this channel for any sponsored program or lead generation program with support of 3rd party agency/tool.
Web Content	Default	WBC	Use this channel for any gated content or lead generation program that is promoted on the SSGA website

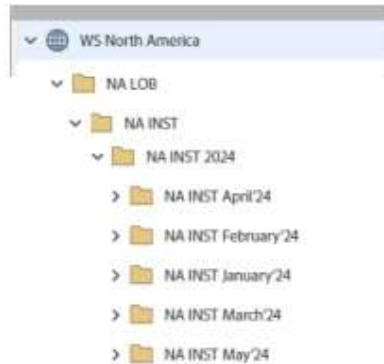
3. Folder structure and naming conventions

Below are the folder structure and naming conventions in Marketo.

3.1 Workspace and Folder Structure

In Marketing Activities, use folders to organize programs and assets. Each folder follows a hierarchy to should have a clear naming convention based on region, LOB and Month.

Workspace: Region > Folder: LOB > Folder: Year > Folder: Month



There are NA, EMEA, Australia, North East Asia, South East Asia and Japan (SPDR & GIG) workspaces in Marketo and follow the same Workspace and Folder structure.

3.2 Program Naming Convention

Each Marketo Program should have a unique name as no two programs can have the same name.

Naming Convention:

LOB|YYYY.MM.DD|Custom Name|LS|Asset Class & Theme|Channel|Country|Initial

Naming Convention for AB Testing Program:

LOB|YYYY.MM.DD|Custom Name|LS|Asset Class & Theme|Channel|**ABProgram**|Country|Initial

Naming convention for Lead Gen program:

LOB|YYYY.MM.DD|Custom Name|**LEAD-GEN**|LS|Asset Class & Theme|Channel|Country|Initial

NOTE: Adding “ABProgram” in the program naming convention helps capturing the engagement activity of Opens/Clicks in MSI.

The list of lead scoring models for each LOB are listed below. These scoring codes should be included in the program name to ensure that the score reflects engagement across channels.

3.2.1. For Intermediary

Lead Scoring Model	Scoring Code
Portfolio ETFs	LCC
Sectors	SEC
Fixed Income	FIX
Smart Beta	BTA
ESG	RES
Gold Products	WGC
Broad Equity	EQI
Strategically Important Funds#	SIF
General ETF Interest*	ETF
Model Portfolios	MOD
Everyone Else (GMO)	GEN
PAIF	PAI
Local Equities	LEQ
Active Fixed Income	AFI
SPY	SPY
MDY	MDY
DIA	DIA

* GEN ETF Interest includes Flash Flows, Chart Pack, ETF Outlook, ETF Education, Strategy Espresso
 * Strategically Important Funds includes STOT, EMTL, MFS, Kensho

NOTE: SPY/MDY/DIA are Marketo only fields. Add both scoring codes EQI and SPY/DIA/MDY in the program name for the scoring to reflect in both Marketo and Salesforce.

Use the below codes in the Marketo Program Name in case of 3rd Party list and Lead gen campaigns. Especially, for LinkedIn lead gen programs, ensure that both the program name and LinkedIn form name included with the lead gen code.

Scoring Models	3 rd Party Code	Lead Gen Code
LCC	LEAD-GEN 3RD LCC	LEAD-GEN LCC
SEC	LEAD-GEN 3RD SEC	LEAD-GEN SEC
FIX	LEAD-GEN 3RD FIX	LEAD-GEN FIX
BTA	LEAD-GEN 3RD BTA	LEAD-GEN BTA
RES	LEAD-GEN 3RD RES	LEAD-GEN RES
WGC	LEAD-GEN 3RD WGC	LEAD-GEN WGC
EQI	LEAD-GEN 3RD EQI	LEAD-GEN EQI
SIF	LEAD-GEN 3RD SIF	LEAD-GEN SIF
ETF	LEAD-GEN 3RD ETF	LEAD-GEN ETF
MOD	LEAD-GEN 3RD MOD	LEAD-GEN MOD
GEN	LEAD-GEN 3RD GEN	LEAD-GEN RES
PAI	LEAD-GEN 3RD PAI	LEAD-GEN PAI
LEQ	LEAD-GEN 3RD LEQ	LEAD-GEN LEQ
AFI	LEAD-GEN 3RD AFI	LEAD-GEN AFI
SPY	LEAD-GEN 3RD EQI SPY	LEAD-GEN EQI SPY
MDY	LEAD-GEN 3RD EQI MDY	LEAD-GEN EQI MDY
DIA	LEAD-GEN 3RD EQI DIA	LEAD-GEN EQI DIA

Examples for Intermediary:

- General Program** SPDR |2024.04.01|Weekly Chart Pack|SEC|EML|NA|SS
- AB Program** SPDR |2024.04.01| Weekly Chart Pack |SEC|EML|**ABProgram**|NA|SS
- Lead Gen Program** SPDR |2024.04.01| Weekly Chart Pack |**LEAD-GEN|EQI|SPY**|LKN|NA|JS

3.2.2. For Institutional

Lead Scoring Model	Scoring Code
Active	ACT
Cash	CSH
ESG	ESG
Fixed Income	FIC
Index	IND
Investment Brand	IBR
OCIO	OCI
Real Estate	REI
Retirement	RET
Retirement Income	RIN
Smart Beta	SMB
Target Date Fund	TDF
Defined Benefit	DFB

Use the below codes in the Marketo Program Name in case of Lead gen campaigns. Especially, for LinkedIn lead gen programs, ensure that both the program name and LinkedIn form name included with the lead gen code.

Lead Scoring Model	Lead Gen Code
Active	LEAD-GEN ACT
Cash	LEAD-GEN CSH
ESG	LEAD-GEN ESG
Fixed Income	LEAD-GEN FIC
Index	LEAD-GEN IND
Investment Brand	LEAD-GEN IBR
OCIO	LEAD-GEN OCIO
Real Estate	LEAD-GEN REI
Retirement	LEAD-GEN RET
Retirement Income	LEAD-GEN RIN
Smart Beta	LEAD-GEN SMB
Target Date Fund	LEAD-GEN TDF
Defined Benefit	LEAD-GEN DFB

Examples for Institutional:

General Program INST|2024.05.13|Weekly Economic Perspectives|IBR|EML|NA|SS
AB Program INST|2023.06.28|DC Q2 eNewsletter|TDF|EML|**ABProgram**|EMEA|BS
Lead Gen Program INST|2023.06.28|DC Q2 eNewsletter|**LEAD-GEN**|TDF|EML|NA|BS

3.2.3. Managed Funds

Lead Scoring Model	Scoring Code
Active Fixed Income	AFX
Active Multi Asset	AMA
Active Quantitative Equity	AQE
ESG	STN
General MF	BRO
Gold Product MF	GOL

Use the below codes in the Marketo Program Name in case of Lead gen campaigns. Especially, for LinkedIn lead gen programs, ensure that both the program name and LinkedIn form name included with the lead gen code.

Lead Scoring Model	Lead Gen Code
Active Fixed Income	LEAD-GEN AFX
Active Multi Asset	LEAD-GEN AMA

Active Quantitative Equity	LEAD-GEN AQE
ESG	LEAD-GEN STN
General MF	LEAD-GEN BRO
Gold Product MF	LEAD-GEN GOL

Examples for Managed Funds:

General Program MF|2024.03.01|Active Equities|AQE|EML|AU|HD
AB Program MF|2024.03.01|Active Equities|AQE|EML|**ABProgram**|EMEA|BS
Lead Gen Program MF|2024.03.01|Active Equities|**LEAD-GEN**|TDF|EML|NA|BS

4. Smart Campaign Naming Convention

Use the below naming convention for a Smart Campaign.

Naming Convention: Number|ActionOfTheCampaign

Example:

- 00|SendEmail
- 01|FillOutForm
- 02|SendConfirmation
- 01|Send Invitation
- 02|Registered, Conf Email & Reminder

5. Asset Naming Convention

Assets in Marketo can be an Email, Smart Campaign, Landing Page, Form, Smart List, Report etc. The naming convention for creating any asset is mentioned below.

Naming Convention: YYYY.MM.DD|Initials|AssetType|AssetName

Sample Naming Conventions:

Email:

- 2024.01.10|JC|Email|Gold YEO Redeploy
- 2024.04.08|BS|Email|Weekly Economic Perspectives & Weekly Market Update

Smart List:

- 2024.04.08|BS|Smart List|Distribution List

4a. Landing Page URL Naming Convention

By default, the URL of the landing page is a combination of Program Name and the name of the landing page. For example, if the program name is SPDR |2021.11.01|Program|SEC|EML|NA|SU and landing page name is Registration Page the final URL of the landing page would be

https://comms.ssga.com/SPDR20211101ProgramSECEMLNASU_Registration-Page.

The URL can be modified by clicking on the Landing Page Actions > URL Tools > Edit URL Settings and enter the text in the open text box of New URL. It is important to follow the naming convention while modifying the URL to avoid using similar URLs which can impact the analytics.

Proposed naming convention is **https://comms.ssga.com/REGION-LOB-LS-Custom-Name**.

The example of an updated URL for Intermediary is given below:

https://comms.ssga.com/NA-SPDR-SEC-Registration-Page.html

For other LOBs under INST the sample URLs given below:

For CASH - **https://comms.ssga.com/NA-CASH-TDF-Thank-You-Page.html**

For DC - **https://comms.ssga.com/NA-DC-TDF-Thank-You-Page.html**

For MF - **https://comms.ssga.com/NA-MF-TDF-Thank-You-Page.html**

Renaming of the landing page URL as per the naming convention is mandatory for all the landing pages created in Marketo campaigns and the main objective is to address the issues around reporting and offer a better user experience.

