Marketo Engagement Map

By
Marketing Automation Team

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Marketo Engagement Map

The Marketo Engagement Map is a powerful and intuitive visual tool that allows you to streamline the Smart Campaign process and take control of your customer engagement journey like never before. The value of Engagement Map lies in the ability to build out reusable campaigns aided by intuitive visualization. It brings in a layer of simplicity in a sophisticated tool.
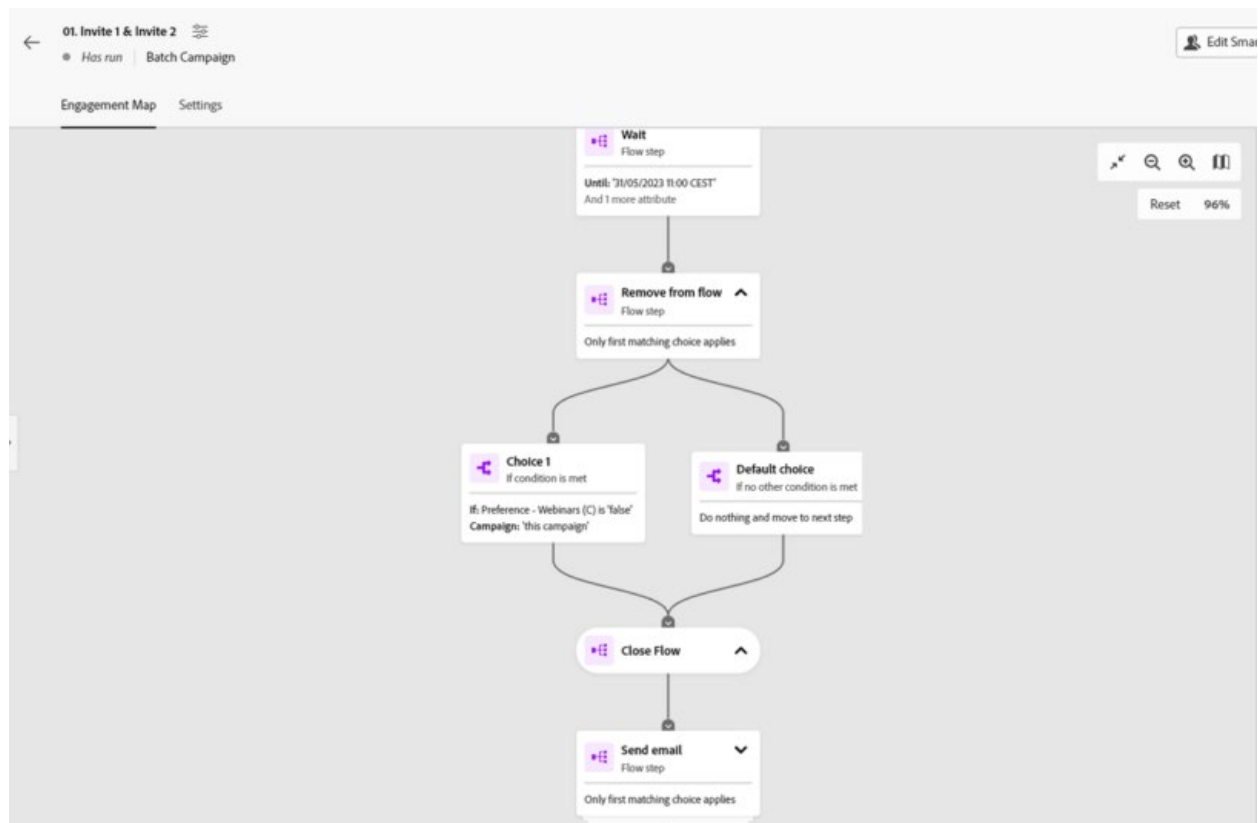

Advantages of Engagement Map

- Easily manage and validate interconnected campaigns with visualization
- Increase operational efficiency with enhanced error handling and troubleshooting
- Improve alignment across key stakeholders with intuitive visuals that provide insight into complex campaigns

Accessing Engagement Maps

Navigate to any existing campaign and click the Engagement Map button.
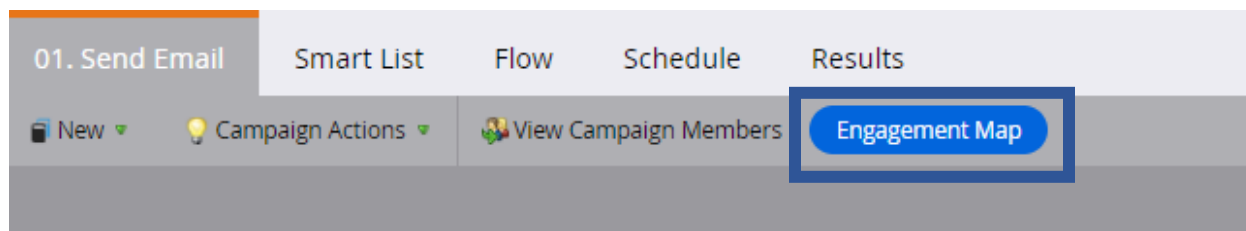
Once in the Engagement Map, you'll see the below:

Top Navigation

The top nav includes the following features:

- Campaign status and type of campaign will be reflected below the campaign name. By clicking ⚙ gives access to edit the campaign name and description
- Edit Smart List – Clicking this will navigate to the Smart List interface in a new tab to edit your filters and/or triggers
- Edit Flow – Clicking this will navigate to the Flow interface in a new tab to add or edit your Flow Steps
- Export - This will download an image of the campaign visualization. The version downloaded will reflect any branches that you have expanded
- View Campaign Members - This will open a new tab with Campaign Member details
- For Trigger campaigns, an Activate/Deactivate button is available

Feature Overview

Engagement Map Tab

Engagement Map is represented through a series of trigger, filter, and flow cards. Clicking on each card will reveal additional information.

Trigger Detail

On the Engagement Map, clicking on Triggers card will show a slide-out panel on the right with the below information

- Campaign the trigger belongs to
- List of constraints associated with the trigger
- Edit Trigger

Clicking on the **Edit triggers** button will redirect to the smart campaign view to add/remove/review triggers.
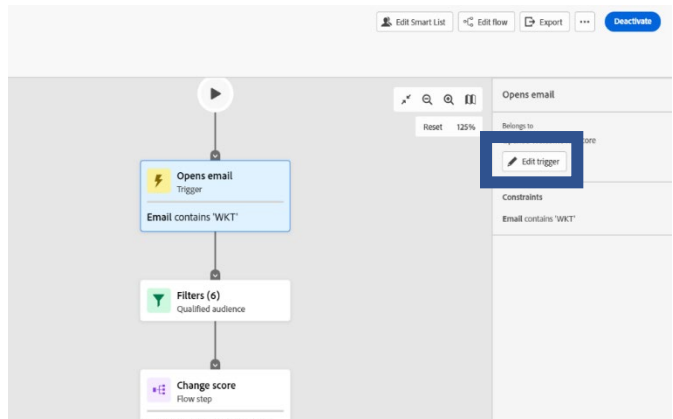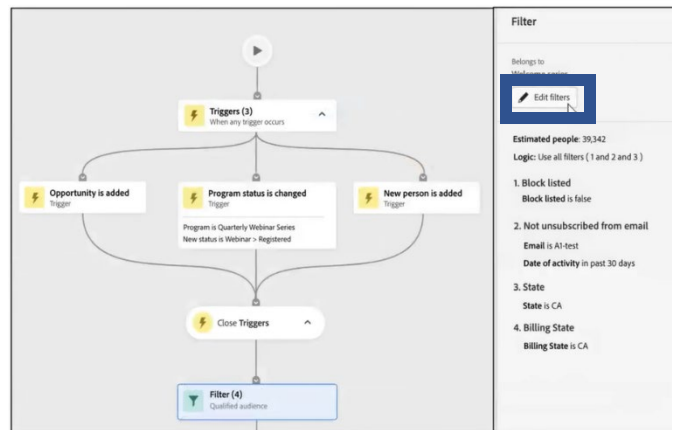
Filters

Clicking on Filter card will show slide-out panel on the right with the below information

- Campaign the filter belongs to
- Estimated number of people who qualify for the filter
- List of filters and their respective constraints
- Edit Filter

Clicking **Edit filter** button will redirect to the smart campaign view to add/remove/review triggers.

Flow Steps

Clicking on Flow overview card will show choices included in the flow steps. Clicking on it will reveal a slide-out panel with the following information:

- Campaign the Flow Step belongs to
- List of choice conditions associated to the Flow Step
- Edit Flow Step
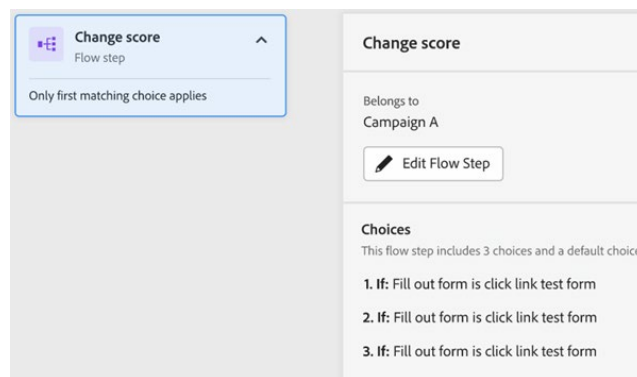
If a Flow Step does not include any choices, this card will show the attributes associated with the Flow Step. Clicking on it will reveal a slide-out panel with the following information:

- Campaign the Flow Step belongs to
- List of attributes associated to the Flow Step
- Edit Flow Step

Clicking **Edit Flow Step** button will redirect to the smart campaign view to add/remove/review triggers.

Error Handling

Errors in Filter, Triggers or Flow Steps are highlighted on the cards with a red error symbol. Additional details will be available on the side panels.

Errors in filter cards can include:

- An error in the Smart List which will result in qualified audience not being shown
- An error in the filter logic
- An error in constraints (or lack thereof) in one or more filters
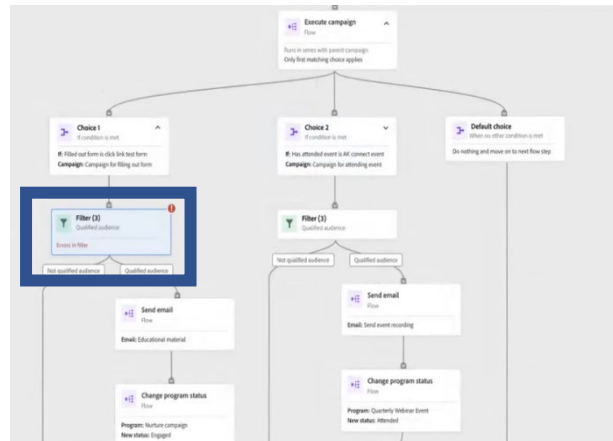
Below are some examples of the errors
that will be displayed upon clicking the cards with error symbols
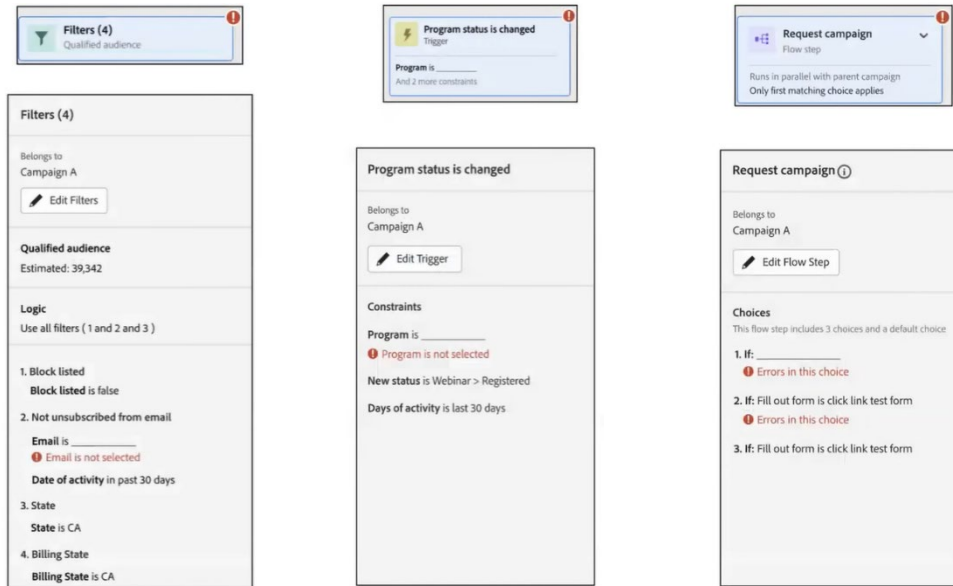
Settings Tab

The Settings tab is home for all campaign settings, including the same permission sets and access as the Schedule tab in Smart Campaigns. It includes the following three sections.

Qualification Rules: Determines how many times each person can run through the Smart Campaign flow.

Individual Runs: Can be used to schedule single runs either immediately or in the future.

Recurrence: Used to schedule a daily, weekly, or monthly recurrence.
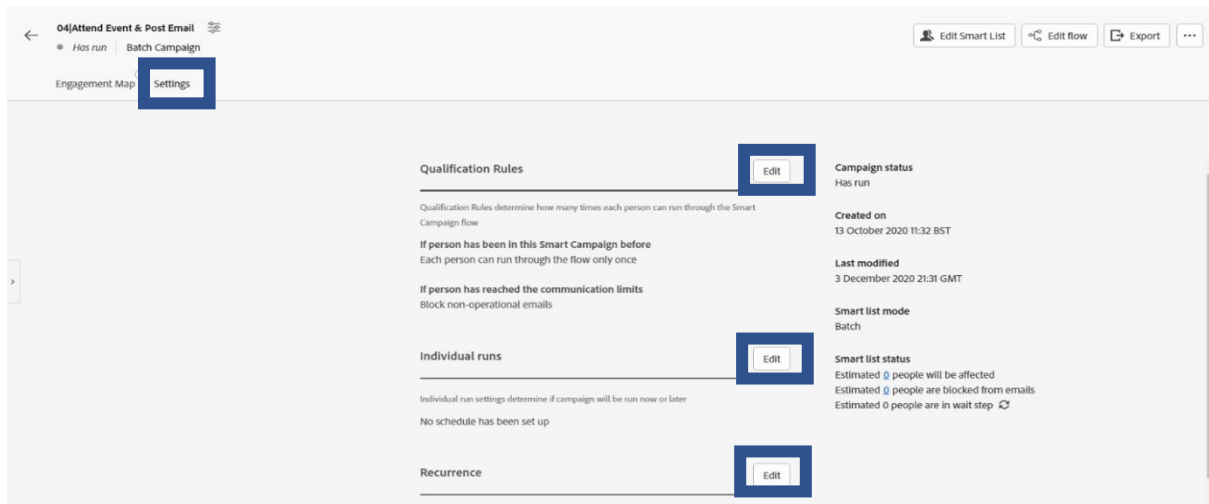
FAQ

Do I have to rebuild all my campaigns in Engagement Map?

No. Engagement Map has full backwards compatibility. With the click of a button, you'll be able to see each of your existing campaigns in the visual Engagement Map interface.

Does having Engagement Map in Marketo mean I'll lose access to the folder structure and will have to re-learn how to build a Smart Campaign?

No. The great thing about Engagement Map is that it gives you the best of both worlds; it's complementary to the current way you build campaigns. You can choose if you want to use the existing UI or build/visualize in the new UI. All users will still get Marketo's powerful feature set, now complemented by a visual creation tool.

How is this different from other visual builders?

There are three key things that set Engagement Map apart:

- Flexibility: Easily manage and validate interconnected campaigns with visualization
- Functionality: All visuals are out of the box, making it easier to use; the nested structure allows you to dive in and get the whole picture.
- Power: You retain all the existing sophistication of Marketo, now in a visual format.

Prepared By	**Shyamanjan Bose**
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User Name	Marketing Automation Team
Reviewer's	Siva Karthik Kancharla

Amended Details

Sr. No.	Amended Date	Amended By	User Name	Description of Change
1				
2				
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