STATE STREET GLOBAL ADVISORS

# Zoom – Marketo Integration Guide

Contents

STATE STREET GLOBAL ADVISORS

Marketo Webinar program can be connected to Zoom webinar provider so that you can track your registrants and attendees within Marketo. Marketo pushes registration information captured from Marketo form placed on the landing page to Zoom and pulls attendees information automatically into Marketo Event from Zoom.

1. Clone a Zoom Program from COE workspace in Marketo

A Zoom webinar program template is created in the COE workspace. It includes registration form and all necessary smart campaigns to configure the webinar in Marketo.

a) In **Marketing Activities**, go to **WS COE** workspace and select **Zoom Webinar Campaign - COE Template**. On the right you will see **Event Actions**; select **Clone** from the dropdown (OR) right click on program template and click **Clone** to copy the program to your workspace.

 or
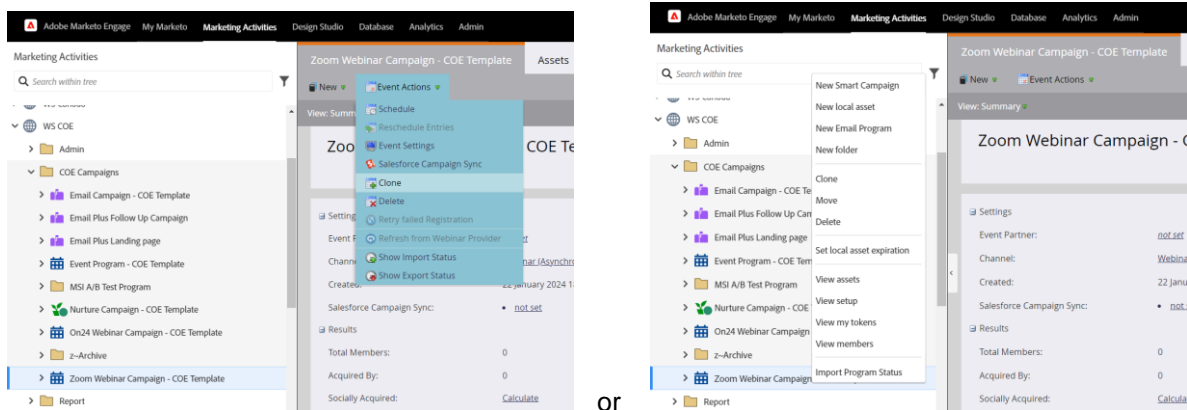
Make sure that you are following the proper naming convention as instructed on our naming convention guide while cloning a program to your Workspace.
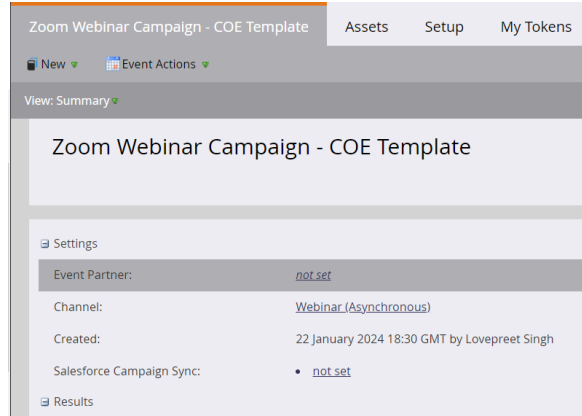
STATE STREET GLOBAL ADVISORS

2. Configure Event Settings and Sync Zoom webinar with Marketo:

Once the program template is cloned to your workspace, connect it to Zoom webinar by using '**Event Name**' as instructed below:

a) Click on Event Actions on Program and select Event Settings or Click on '**not set**' option under '**Event Partner**' on the dashboard.

or
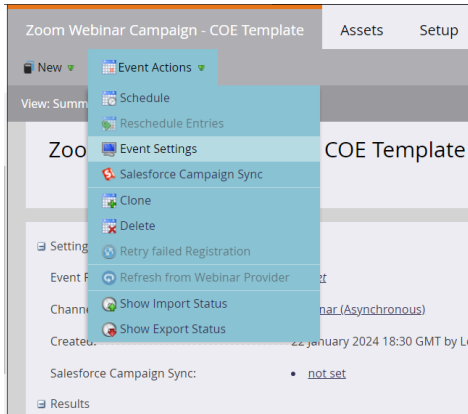
b) Enter the webinar details on 'Event Settings' window and then click on Save.

Select Event Partner as '**Zoom**' and Login as '**Zoom Integration**' and select the relevant Webinar name from the dropdown in the Event section.

Click Save and the connection between Marketo and your Zoom webinar is established.

Please note:

- ▪ *The webinar should be created in Zoom first to show up under Event in Marketo. In case there are multiple upcoming webinars scheduled, all the webinars will be showing up.*
- ▪ *In case the webinar name is not showing up under Event, please reach out to CAVS team.*

STATE STREET GLOBAL ADVISORS

3. Assets

When you clone an event program template from COE, you will have all the required smart campaigns and registration form within the program.

Under Assets folder, there are standard registration forms created for each LOB which includes all mandatory fields that need to be captured from the registrants. We recommend that you create the registration page and all the required emails using our updated templates.

It's required to connect invitation email, registration form and registration page together as shown below:

3a) How to add form to the Marketo Landing Page:

Select Form section on Elements of the landing page and choose the form from the dropdown menu on the 'Insert New Form' tab. Select the relevant Follow-up page. This is the thank you landing page where the user will be redirected when someone fills the registration form. Click Insert.

STATE STREET GLOBAL ADVISORS
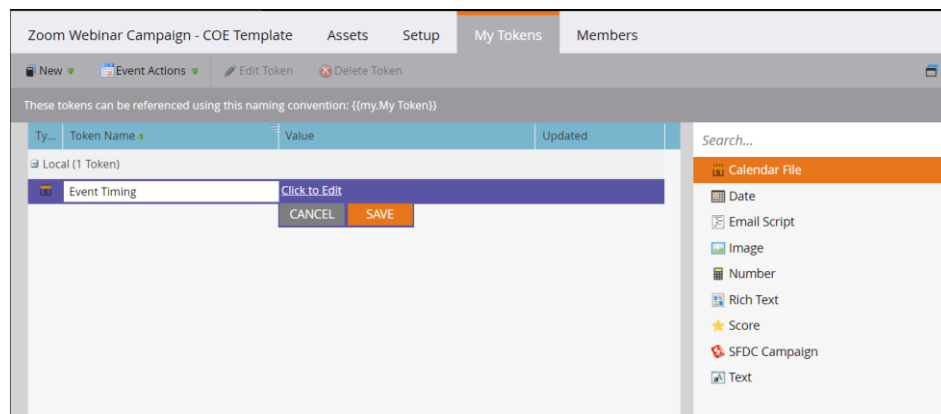
3b) How to create Calendar File

A Calendar File token allows you to add a calendar event (.ics) link to your Marketo emails and landing pages.

    i.   In the Marketo program, go to **My Tokens** tab.
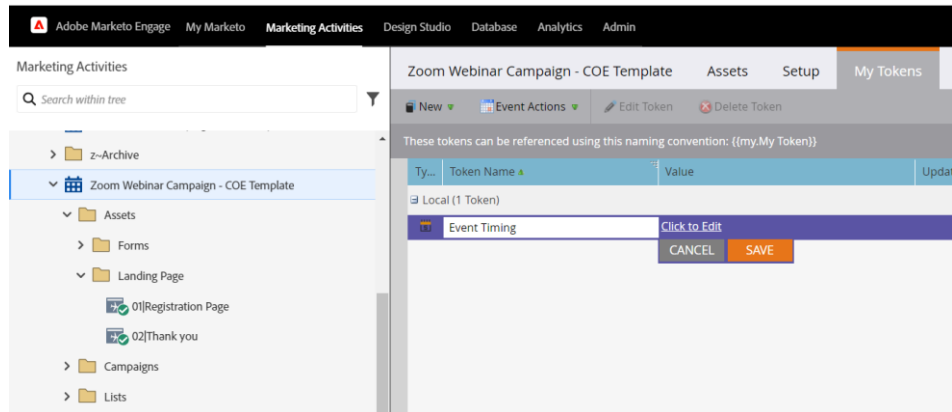
    ii.   Drag a **Calendar File** token to the canvas and edit the name.

    iii.   Enter the Webinar details and click **Save.**

Now, you can add a calendar event (.ics) link to your Marketo email or landing page.

Note: Member Tokens are used to insert unique values from integrated services partners like Zoom or ON24. A common use of Member Tokens is for unique URLs for webinar attendees. Each person has a

STATE STREET GLOBAL ADVISORS

unique URL to access the webinar that can be inserted using a {{member.webinar url}} token. The {{member.webinar url}} token automatically resolves the person's unique confirmation URL generated by the service provider.

3c) To add Calendar(.ics) file on emails:

There are two different ways to add ics file on email modules. Either you can add an .ics file url on CTA button or add a Calendar file token on the hyperlinked text.

i. How to add Calendar(.ics) file on CTA's:

On email editor pane, drag a module which has CTA button in it:

On the right side of the screen, you will see '**Local Variables'**, paste the **.ics** file url on '**CTA URL'** option and approve the email draft.
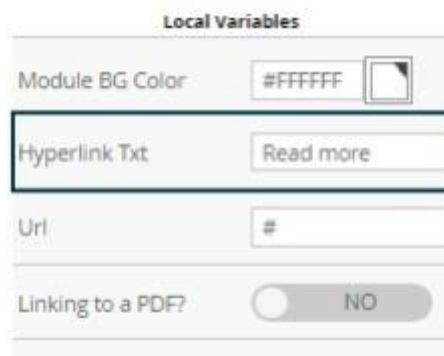
STATE STREET GLOBAL ADVISORS

ii. How to add Calendar token on hyperlinked text:

1. On email editor pane, drag a module which has hyperlinked text in it:

Short description of article/piece, 35–40 words. Should be clear and concise. Lorem ipsum dolor sit amet, consectetur labore et dolore magna adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Read more

On the right you will see 'Local variables', paste my token {{my. Calendar token}} on 'Hyperlinked Txt' option and approve the email draft.

Local Variables		
Module BG Color	#FFFFFF	
Hyperlink Txt	Read more	
Url	#	
Linking to a PDF?	NO	

4. Points to remember

- Use Marketo form only for collecting registrations for the webinar. Using Zoom registration page/form will result in absentees /no show people not synching back to marketo.
- If the webinar is finished before the scheduled time the information will be synced to Marketo only after the scheduled time.
- When scheduling the webinar in Zoom, the Registration "Required" box must be checked in order to populate the registrant's unique URL, the Marketo token {{member.webinar url}}.
- All webinar hosts, co-hosts, and panelists will be synced to the marketo as the attendees. They have to be excluded from the post event campaigns for accurate reporting