

## Public Policy Research Non-Profit

Managing a successful and complex migration to Marketo to allow uninterrupted email newsletter distribution, and ensuring comprehensive platform training for staff.



## The Situation

**A public policy think tank that curates and distributes the latest news and information across several focus areas** needed a powerful marketing automation platform to distribute email newsletters to thousands of subscribers.

The current email service provider (ESP) the think tank was using didn't offer enough robust functionality to meet its' needs. The organization also wanted to move some complex workflows out of Salesforce and into the new marketing automation platform, Marketo, so its marketing and event teams could more easily manage those processes.

A team from Marketo completed the initial setup of the platform. Following that, Right Source was brought in to address the organization's unique and complex needs and train the staff on all of the platform's available features.

**The organization needed an email service provider with more functionality and sought to move complex workflows out of Salesforce and into its new marketing automation platform.**

## Challenges

- ➔ The nonprofit hosts more than 200 events per year, which involves sending confirmations and other event communications through multiple workflows. The organization needed to be able to simplify the process with Marketo features and customized workflows.
- ➔ The nonprofit lacked automation and control over many of its processes, especially when it came to events. Rather than scheduling emails, the events team members used manual processes to send communications, which created a lack of insight into email performance.
- ➔ The organization's high volume of email newsletters necessitated a more efficient email setup, including a subscription center, highly customized email templates, and the ability to clone emails for daily production.
- ➔ The nonprofit's staff had not been fully trained on Marketo, so even with a successful initial setup, the organization needed additional training and assistance to take advantage of the platform's features and maintain the new efficiencies.
- ➔ The organization sends a large volume of email newsletters to highly engaged audience who anticipate those emails. Because of this, they needed to strategically warm up the new dedicated IP address. If the organization sent out too many emails too quickly through Marketo, it could risk the emails coming across as spam and not reaching recipients, ultimately damaging the IP address and future deliverability.

## The Work

Right Source developed a strategy to optimize the nonprofit's Marketo instance, including setup, training, and reporting.

### Following the initial Marketo setup, Right Source:

- ➔ **Created a schedule to effectively warm up the organization's IP address**, ensuring that the company could continue with an uninterrupted email schedule.
- ➔ **Developed wireframes and modular templates** based on Marketo's proprietary email code.
- ➔ **Moved the organization's comprehensive event-management process from Salesforce to Marketo.** This allowed the organization to send out timed emails and provided more flexibility in the order and deployment of emails.
- ➔ **Created user-friendly email programs** that could easily be cloned and implemented for each of the nonprofit's multiple daily newsletters.
- ➔ **Created forms and landing pages** and moved several existing forms from the nonprofit's former ESP into Marketo. This provided the foundation for a subscription center, as well as an established workflow to maintain it.
- ➔ **Provided extensive hands-on training in Marketo** as features were deployed, ensuring staff could fully take advantage of the platform and its efficiencies.

## Results

After a successful transition to Marketo, **Right Source helped the nonprofit see the following results within just 30 days of full launch:**

**EMAILS SENT:**  
 695,000

**BOUNCE RATE:**  
 0.2%

**DELIVERY RATE:**  
 99%

**CLICK-TO-OPEN RATE:**  
 14%

**OPEN RATE:**  
 21%

**CLICK-THROUGH RATE:**  
 3.2%

**UNSUBSCRIBE RATE:**  
 <0.01%

## Other Results

- ➔ **Better reporting**, allowing the organization to glean more insights from email sends
- ➔ **Reduced time to create, test, and send daily newsletters** through program and email tokenization
- ➔ **Improved accuracy and reduced user error** through program standardization and tokenization
- ➔ **More flexibility** to adjust landing pages when necessary



*“We worked closely with the nonprofit team to understand their needs and make sure we provided them with the tools and training required to take full advantage of the platform. Their collaboration and commitment to improving their processes made a big difference in making the successful transition to Marketo.”*

— Shannon Walsh, Senior Director of Marketing Technology, Right Source Marketing

# RightSource M A R K E T I N G

At **Right Source**, we help companies show results on marketing investment by building and implementing strategic plans that use content, design, technology, and targeted distribution to engage audiences.

[rightsourcemarketing.com](http://rightsourcemarketing.com)  
[info@rightsourcemarketing.com](mailto:info@rightsourcemarketing.com)  
[Marketing Trenches blog](#)  
888-512-0451

BALTIMORE, MD  
1922 Greenspring Drive  
Suite 3  
Timonium, MD 21093

WASHINGTON, D.C.  
11718 Bowman Green Drive  
Suite 50  
Reston, VA 20190