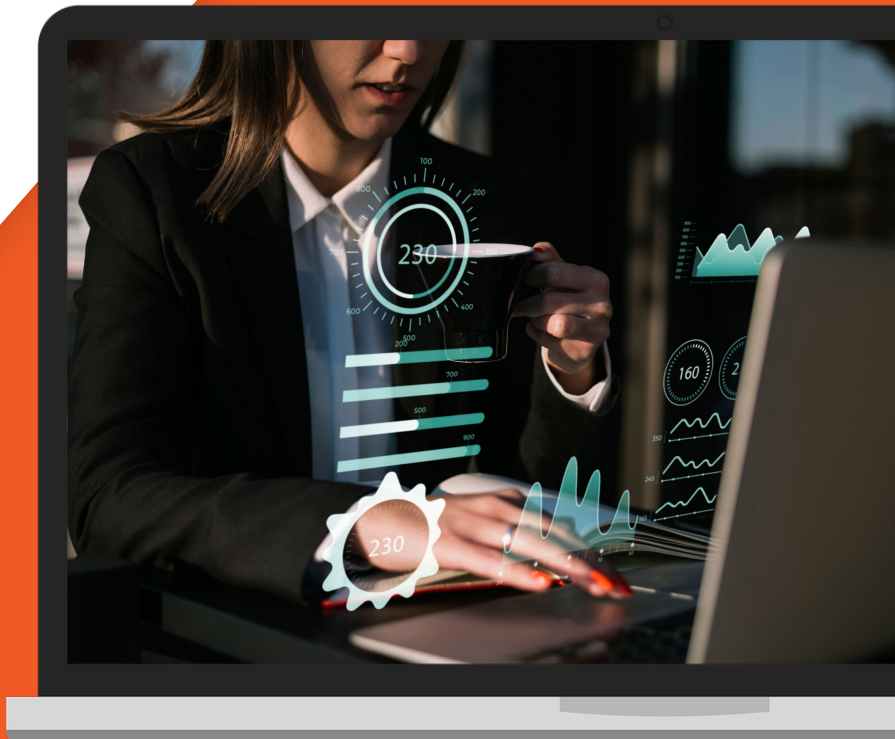


# Enterprise-Level Automations and Integrations for Global Impact:

A Healthcare Client's Journey with MAC

## CASE STUDY



## About The **Client**

Our client is a global leader in the clinical diagnostics industry. They've been at the forefront of healthcare innovation for over 80 years.

Specializing in diagnostic solutions across biotechnology, diagnostics, and life sciences, our client is dedicated to improving healthcare through advanced science and technology.

The modern healthcare industry has multifaceted needs, especially when it comes to technology—and that leads us to the roadblocks our client faced.

Our client faced challenges in its global operations, particularly with marketing technology. The company's brand-new Marketo instance had limited capabilities, which made it ineffective in the demanding environment of the healthcare industry. When MAC came on board, the client barely had anything set up.

Their wide operations highlighted the need for a custom, integrated marketing automation system. The main goal was to build a scalable and strong foundation.

The client's team needed a partner with expertise in complex, enterprise-level projects to ensure multiple departments could fully use the new system. They chose MAC to help them evolve their Marketo instance into a strategic global marketing tool.

## Project Summary

Our experts at MAC were the perfect fit for the client's needs. Our organization specializes in overcoming enterprise-level automation hurdles. After joining forces, our team worked on creating a holistic transformation of the client's Marketo framework.

### Core Objective

Although we assisted our client across many verticals, the core objective was to create an enterprise-level marketing automation framework that would cater to the needs of their global operations, implementing seamless integrations along the way.

Keep reading to discover the challenges we faced, the solutions we implemented, and the results we achieved.



## Focus Areas

**Here are the main focus areas that MAC tackled to help our client achieve their marketing automation goals:**

- Strategic development and project management
- Integrations
- Database clean-up
- Lead field mapping
- Lead source attribution
- Lead scoring program
- Lead lifecycle program
- Nurture program development
- Reporting

**We worked in these areas across the following departments:**

- Microbiology
- Hematology
- CDS

Each department presented its own challenges, which we developed unique solutions for. We summarize these below.

## Strategic Development and Project Management

Our relationship with the client went beyond implementation. First, we began by developing a strategic action plan.

### Consulting

We started by understanding where our client was in their marketing technology journey and where they aimed to be. Then, we devised and executed plans that aligned with their overarching business goals.

Through our collaboration, we became more than a service provider—we became a strategic partner working alongside our client.

## **Project Management**

Our project management approach was instrumental in steering these initiatives from the planning stage to delivery. By taking charge of the project's direction, we alleviated the burden from our client's team, smoothing out processes to achieve more, faster.

## **Training and Onboarding**

Throughout our partnership, the client brought on new hires and shifted roles internally. MAC has been a constant through these transitions. Our team assisted with the onboarding and training of new team members. This consistency in support has solidified our role as not just consultants, but integral members of the client's team.

## **Integrations**

MAC has been instrumental in enhancing our client's marketing automation capabilities. To facilitate our client's operations, we created a network of seamless integrations.

### **Salesforce-Marketo Integration**

Given the client's global presence, ensuring smooth integration among their platforms was essential. While our client already had a Salesforce-Marketo integration in place, our role was to audit the existing setup and provide recommendations for improvements.

We began by evaluating all standard integration fields between Marketo and Salesforce, including their visibility and mapping.

Our team also investigated and resolved sync exceptions for records that were failing to transfer data from Marketo to Salesforce.

We analyzed and tested the current marketing fields utilized for Marketo activities to ensure correct usage.

## Additional Integrations

**Our assistance has extended to integrating multiple other platforms, such as:**

- LinkedIn for targeted advertisements
- Livestorm for webinars
- ZoomInfo for data enrichment
- Google Analytics (GA4) for comprehensive analytics
- LinkedIn tracking codes to optimize LinkedIn ad conversions
- iCapture for streamlining offline conversion tracking

Through these strategic integrations, we provided holistic, cutting-edge marketing solutions to drive our client's business forward.

## Database Clean-Up

This project aimed to consolidate Smart Lists within Marketo to weed out unnecessary records, enhancing the overall efficiency of our client's marketing automation framework.

The initiative demonstrates MAC's strategic approach to tackling complex challenges head-on. The collaboration required close coordination with the client's Salesforce team, who were tasked with creating specific workflows that would enable the conditional synchronization necessary for maintaining a clean and efficient database.

One of the notable hurdles was the restriction from deleting contacts directly from Marketo. MAC's innovative solution to this issue was to mark these contacts as marketing suspended so we could retain the integrity of the database without losing potentially valuable contacts permanently.



## Lead Field Mapping

Our goal was to ensure accurate mapping of data fields from Lead to Account, Contact, and Opportunity within Salesforce, enhancing global lead management.

The client initially set up the field mappings. Our team then verified their accuracy and created additional fields in the Salesforce test environment to ensure smooth data flow and system integrity.

## Revenue Attribution Setup

We established a multi-touch attribution model to analyze how each marketing interaction influenced our client's revenue. This model assigned credit to every touchpoint in a lead's journey before they became customers. We pinpointed which channels and strategies contributed the most to increasing our client's revenue. This gave them the insight they needed to fine-tune their marketing efforts and maximize ROI.

## Lead Source Attribution

We guided the client's Salesforce team to establish the necessary lead source attributes across their global operations.

We initiated both batch and triggered smart campaigns to update lead sources. We encountered challenges with updating lead source values in Salesforce, discovering that these values were picklist fields requiring precise updates for correct synchronization. This clarification allowed us to streamline the process and align lead source information across different platforms effectively.

## Lead Scoring Program

Our team developed intricate lead scoring models tailored to the client's needs. Each department wanted to implement its own scoring and lifecycle models.

We created a sophisticated architecture within Marketo that supported a single workspace and partition structure. This allowed us to manage diverse scoring criteria and lifecycle stages, ensuring cohesive yet customizable lead management across the organization.

As we mentioned previously, our client had a nuanced database structure, which we had to consider along with their lead management framework.

We created new fields to facilitate the scoring process. Our team also clarified and resolved field-type issues in Salesforce, ensuring the lead scoring model was seamlessly integrated and functional.

## Lead Lifecycle Program

We implemented a lead lifecycle management program for our client, considering the complex needs of different business units (BUs). Our model ensured that leads entering the MQL (Marketing Qualified Lead) stage for one BU wouldn't qualify as MQLs for another BU, crucial due to overlapping demographics.

Custom fields and smart campaigns were created to manage lifecycle transitions effectively, pushing leads into appropriate Sales Accepted Lead (SAL) queues in Salesforce. This setup allowed precise tracking of lead progression, providing our client with valuable insights to improve their marketing strategies.

## Nurture Program Development

Our team developed multiple sophisticated nurture programs tailored for our client's three departments, each accommodating up to five distinct streams and a series of 30 emails. We guided the client in creating content for these campaigns and provided industry benchmarks. Our team implemented Champion-Challenger (A/B) tests, allowing us to refine strategies based on open rates and engagement metrics.



The nurture campaign is now live and operational. Through this strategic endeavor, we aimed to enhance engagement and effectively communicate with the targeted demographics in the microbiology segment.

## Reporting

Finally, we worked with the client to streamline their reporting process. We kicked things off with three discovery calls to thoroughly understand the client's reporting needs for both Marketo and Salesforce.

From the beginning, it was clear that our client lacked visibility into critical data, which hampered their decision-making abilities.

To address this, part of our strategy was to implement new dashboards and reporting tools. This innovation now enables the client to effectively monitor lead generation and accurately measure the ROI of their marketing spend. These insights are vital for strategic decision-making and future planning.

**Additionally, we developed Salesforce dashboards specifically designed to monitor the lead lifecycle, incorporating five critical reports:**

- Leads By Source
- Leads By Score
- Average Deal Size
- Lead by Status
- Lead Conversion Rate

Our quality assurance processes ensured that these dashboards were accurate and effectively met our client's analytical needs, providing them with clear insights into their marketing automation performance.



## Key Results

Our collaboration with the client resulted in remarkable progress across three key areas:



**Major Time Savings:** The systems we implemented helped our client save several hours on marketing operations and lead management processes every month.



**Streamlined Global Integration:** Our experts ensured the flawless integration of intricate systems across different geographical regions, facilitating an uninterrupted exchange of data.



**Enhanced Lead Management:** Through the adoption of advanced lead scoring and lifecycle strategies, we significantly improved lead quality and conversion rates.



**Robust Program Development:** We created nurture programs, event programs, newsletters, and more to target distinct market segments. Our efforts increased engagement and response rates.

Our experts at MAC focused on strategic planning, skilled implementation, and ongoing refinement to establish a new benchmark for marketing automation in the healthcare industry.

## Need Enterprise-Level Marketing Automation Support You Can Trust?

Do you see yourself in a similar situation where you need to automate your processes and increase efficiency?

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