

Global Nonprofit Looking to Improve Communications

Managing a successful — and quick — Marketo migration to provide more robust functionality, deeper reporting, and better integration with the organization's CRM.



The Situation

A global nonprofit aimed to address climate change and inspire urgency and action needed to improve communication to community members in more than 150 countries. With nearly 14,500 community leaders and almost 1.2 million contact records, the nonprofit communicates with an extensive list of engaged subscribers. But to make that communication as effective as possible, the organization needed to switch from its previous email service provider (ESP) to a more robust marketing automation platform.

The current ESP, a tool commonly used by nonprofit organizations, hadn't evolved with the pace of the organization's needs. As a result, the nonprofit experienced poor integration with its Salesforce CRM and wasn't able to track the journey of its supporters. To drive awareness and advocacy, the organization needed better visibility into its audience and more powerful automation abilities.

To meet those needs, the organization decided to migrate to Marketo. However, it faced a tight timeline, as its license with its current ESP would expire in just eight weeks. Once the nonprofit finalized its new Marketo license, Marketo reached out to Right Source for assistance in getting the new platform up and running within the short timeframe.

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Challenges

- ➔ The nonprofit maintains records for nearly 1.2 million contacts and sends electronic communications to a large list of engaged subscribers. Because of this, the organization needed to strategically warm up its new dedicated IP address. If the organization sent too many emails too quickly through Marketo, it could risk those emails not reaching recipients and damaging the IP address.
- ➔ If the organization wasn't able to transition to Marketo within the eight-week timeframe, it would face a five-figure licensing fee to renew its current ESP. It was financially critical to meet the deadline.
- ➔ Just as the organization chose to license Marketo, its primary user on staff took an opportunity at another local nonprofit. Without a dedicated resource available to facilitate the move to Marketo, the nonprofit needed additional assistance with training and ongoing management of the new platform until a new resource could be hired.
- ➔ Over time, the nonprofit had developed some data duplication, such as multiple email addresses for a single contact, within its records. To ensure successful email delivery, the organization needed to de-duplicate the information.

The Work

Working within the tight timeline, Right Source developed and implemented a strategy to establish the nonprofit's Marketo instance, including setup, training, and reporting.

Within the condensed eight-week timeline, Right Source:


- ➔ **Created an expedited schedule to warm up the nonprofit's IP address** to ensure successful email delivery to its extensive list of contacts.
- ➔ **Created email templates and forms** to provide additional personalization in emails, direct-to-Marketo web form submission, and attribution.
- ➔ **Worked with the organization to handle data de-duplication**, ensuring the its contact list was accurate and up to date.
- ➔ **Worked with the IT team to export almost 1.2 million records** from the ESP and import them to Salesforce to synchronize with Marketo.
- ➔ **Strategized and implemented** a customized solution for maintaining affirmative consent for compliance with GDPR.
- ➔ **Implemented a process for monitoring deliverability of emails**, bounces, and possible spam traps.
- ➔ **Provided extensive hands-on training in Marketo** as functionality was deployed so users could take full advantage of the platform and its efficiencies.

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Results

After a successful transition to Marketo, the nonprofit has seen the following results:

EMAILS SENT:

 3.03M

OPEN RATE:

 11%

CLICK-TO-OPEN RATE:

 5.1%

CLICK-THROUGH RATE:

 0.6%

UNSUBSCRIBE RATE:

 0.2%

“The schedule was extremely tight, but this nonprofit team was committed to making the time for training. In the end, that commitment was key to completing the move to Marketo on time — without any negative impact on email delivery or IP address.”

— 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.

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