

BEST PRACTICES FOR LIST UPLOADS

✓ A CHECKLIST

List uploads seem pretty simple at first glance, but they should actually be treated as an advanced maneuver. Any time you are bulk importing information into your database it should be handled with care and precision.

Here's a checklist of my tried and true steps for list uploads.

File Basics

- Always leave your original list intact
- Duplicate your list file and append "for_upload_[date]" to the name

Data Formatting

- For ease, the column headers should exactly match the names of the fields in your database. *Marketo-specific: The header must be "Email Address" and not just "Email."*
- Clean up the formatting issues (all caps, lowercase, etc). Need help? Here's a quick video and cheat sheet: <http://bit.ly/excel-bff-video>
- Make sure all YOUR required fields are populated. In addition to the basics (name, email, company), most businesses have their own fields that are required to effectively route and address their leads.
 - Lead source _____
 - Industry _____
 - Product interest _____
 - State _____
 - Business unit or partition _____
 - Your required field _____
 - Your required field _____

*****If you have any fields that are required to save a record in Salesforce (a common example is Lead Source), that field must be populated in your upload file or your sync will fail for those records.***

Marketing Automation Concerns

- Before you upload your list, be aware of any smart campaigns that are triggered by "Lead is Created". Make sure those campaign flow steps (example "Send Alert to Lead Owner" or "Change Lead Score") are actions that you want to happen for the soon-to-be uploaded leads.
- Marketo-specific: While using the import wizard, Marketo will ask you to which program should be the Acquisition Program for all new leads on the list. This is Marketo's way of stamping first touch attribution. Although it can be changed later, it's better to identify the correct Acquisition Program on upload.

Final Upload Steps

- Save the final CSV file for upload in a folder called "Uploaded Lists."

Why do this? If you find any issues with the data once you upload it, you'll want to be able to go back to the uploaded file to determine if it was caused by a format error in the file or if there was an issue with the system.
- Upload the list into Marketo, your CRM or your marketing automation system.