

The AdRoll logo is displayed in white text on a blue background. The letters 'A', 'R', and 'L' are in a bold, sans-serif font, while the 'd' is lowercase and smaller. A stylized white swirl or arrow-like graphic is positioned at the end of the word.

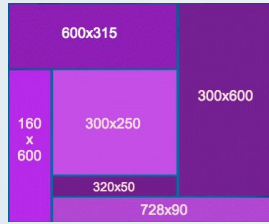
AdRoll

Matching Lifecycle Stage to digital campaign

(aka how to make a static list behave like a smart list)

Matching message to the lifecycle stage using Digital & our own product.

Awareness - Prospecting	Awareness - Known	Interest	Selection	Activation	Live	Churn
Attract new site visitors and convert them into known leads.	Re-engage prospects with the AdRoll brand.	Has demonstrated interest and is directed towards signup/nurture content.	Currently being worked by managed reps -- served case studies and other nurture materials/social proof to help close.	Clear interest with account creation, re-engage them in the dash to help launch first campaign.	Highlight new products and additional "surprise + delight" campaigns for cross/up-sell opportunities and churn prevention.	TBD



How to make static lists behave like a smart list

Only Static List can sync to AdRoll. First step is to build the smart list that filters for the leads/ contacts you want to target with display advertising.

The screenshot displays the AdRoll user interface. At the top, the header includes the AdRoll logo, the name 'adroll', and user information: 'Notifications: 7', 'Jessica Cross', and a 'History' link. Below the header, there are navigation tabs for 'Leads' and 'Smart List', with 'Smart List' currently selected. The main content area is titled 'AdRoll House - 1 Nurture + Marketplace' and contains a message: 'Quality lead not being worked.' Below this, there are two tabs: 'Leads' and 'Smart List', with 'Smart List' selected. The 'Smart List' tab shows a 'Summary' section with the following details:

- Type: Smart List
- Created: August 1, 2016 2:33 PM PDT by Jonathan Koo
- Last Modified: August 1, 2016 2:42 PM PDT

Below the summary, there is a section for 'Smart List (3)' with advanced filters:

- Advanced filters: (1 or 2) and 3
- Filter 1 - Lead Status: Lead Status is '1 - Nurture'
- Filter 2 - Has Opportu...: Has Opportunity is any Stage is 'Not Being Worked'
- Filter 3 - Activity Score...: Activity Score (Marketo) greater than 0

On the left side of the interface, there is a sidebar menu with 'Marketing Activities...' and a 'List Actions' dropdown. The sidebar is organized into 'Batch Campaigns' and 'Smart Lists'. Under 'Batch Campaigns', there are six items: '1 Nurture + Marketplace', '2 MQ + Hunting', '3 Working + Negotiation', '4 Account Sign Ups no spend', '5 Spending Customer', and '6 Churned Customer'. Under 'Smart Lists', there are several items, with 'AdRoll House - 1 Nurture + Marketplace' highlighted in orange.

Next make a corresponding static list

I gave the static list the same name as the smart list so I could easily match them up

The screenshot displays the AdRoll user interface. At the top, a purple navigation bar contains the AdRoll logo, the name 'adroll', and user information including 'Notifications: 25', 'Jessica Cross', 'History', 'Admin', and a profile icon. Below the navigation bar, the main content area is divided into a left sidebar and a main panel. The sidebar, titled 'Marketing Activities...', contains a tree view of marketing activities. The 'Static Lists' section is expanded, showing a list of static lists. The list 'AdRoll House - 1 Nurture + Marketplace' is highlighted in orange. The main panel displays the details for this selected static list. It features a header 'AdRoll House - 1 Nurture + Marketplace' and a 'Leads' section with two actions: 'View members of this list' and 'Find leads'. To the right of the 'Leads' section is a 'Summary' table with the following data:

Status	Used By
Summary	
Type:	List
Created:	August 1, 2016 2:53 PM PDT
Last Modified:	August 29, 2016 3:30 PM PDT
Lead Count:	204485

Nightly batch to update static lists

Next build a batch smart campaign.

The screenshot displays the AdRoll interface for configuring a smart campaign. The top navigation bar includes the AdRoll logo, the name 'adroll', and user information 'Notifications: 7 Jessica Cross'. The main content area is divided into a left sidebar and a right main panel.

Left Sidebar (Marketing Activities...):

- Lead / Contact Country
- Location Segmentation
- Marketo/AdRoll integration
 - Batch Campaigns
 - 1 Nurture + Marketplace** (highlighted)
 - 2 MQ + Hunting
 - 3 Working + Negotiation
 - 4 Account Sign Ups no spend
 - 5 Spending Customer
 - 6 Churned Customer
- AdRoll - Smart to Static (Batch) Strateg
- Global - Smart to Static (Batch)
- Smart Lists
 - AdRoll - CRM Onboarding - US Strateg
 - AdRoll House - 1 Nurture + Marketplac
 - AdRoll House - 2 MQ + Hunting
 - AdRoll House - 3 Working + Negotiat

Nightly batch to update static lists

Flow. If member of smart list, add to the static list. Wait 3 minutes. If not member of not in smart list, Remove from static list.

The screenshot displays the AdRoll interface for configuring a flow. The left sidebar shows a tree view of marketing activities, with '1 Nurture + Marketplace' selected under the 'Smart Lists' category. The main panel shows a flow configuration with three steps:

- 1 - Add to List:** A choice rule where 'If: Member of Smart List' is 'in' 'Marketo/AdRoll integration.Adf'. The 'List Name' is 'Marketo/AdRoll integration.AdRoll House - 1 Nurture + Marketplace'. The 'Default Choice' is 'List Name: -- Do Nothing --'. A note states: 'Note: Only the first matching choice applies'.
- 2 - Wait:** A duration of 3 minutes.
- 3 - Remove from List:** A choice rule where 'If: Member of Smart List' is 'not in' 'Marketo/AdRoll integration.Adf'. The 'List Name' is 'Marketo/AdRoll integration.AdRoll House - 1 Nurture + Marketplace'. The 'Default Choice' is 'List Name: -- Do Nothing --'. A note states: 'Note: Only the first matching choice applies'.

The URL at the bottom is <https://app-si03.marketo.com/#>.

Runs on a nightly to add and remove leads from the list

The screenshot displays a marketing automation interface for a campaign named "1 Nurture + Marketplace". The interface is divided into a left-hand navigation pane and a main content area. The navigation pane contains four steps: "1. Smart List - 'Who'", "2. Flow - 'What'", "3. Schedule - 'When'", and "4. Results - 'Wow!'". The main content area shows a table of campaign runs with columns for Status, Used By, Membership Trend, Members by Week, Email, and Run History. The table lists 13 runs from August 8, 2016, to August 21, 2016, all with a status of "Completed".

1 Nurture + Marketplace

Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

1 Nurture + Marketplace

1. Smart List - "Who"
Define which leads this campaign will affect

2. Flow - "What"
Define campaign actions and steps

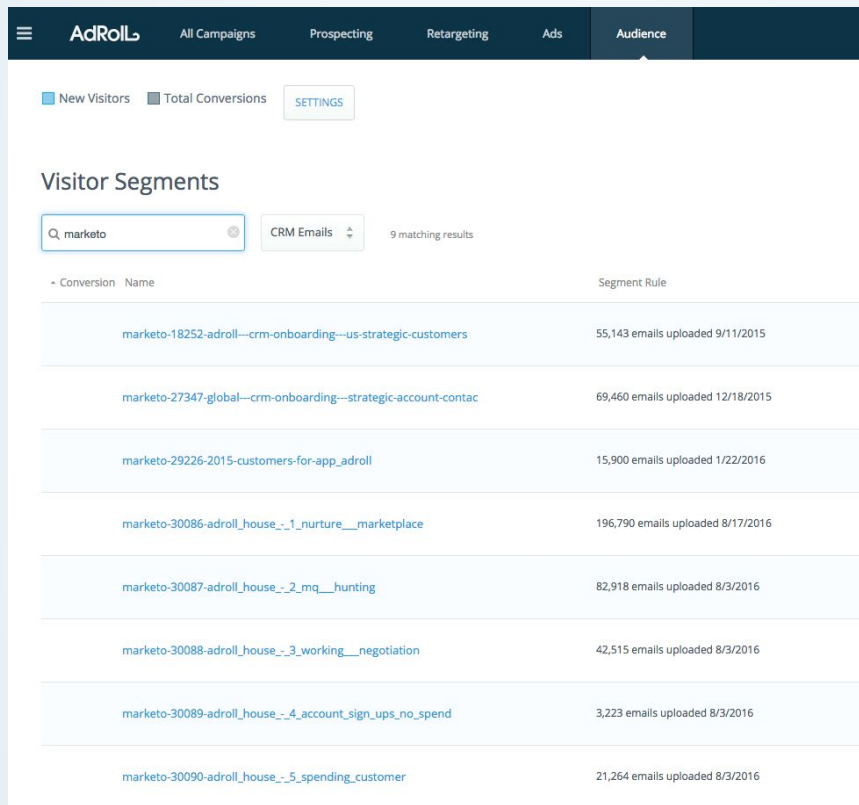
3. Schedule - "When"
Manage when the campaign is active

4. Results - "Wow!"
Track campaign progress

Status	Used By	Membership Trend	Members by Week	Email	Run History
Completed	August 21, 2016 9:10 PM P...	Completed (117 leads qualified)			
Completed	August 20, 2016 9:10 PM P...	Completed (731 leads qualified)			
Completed	August 19, 2016 9:10 PM P...	Completed (394 leads qualified)			
Completed	August 18, 2016 9:10 PM P...	Completed (357 leads qualified)			
Completed	August 17, 2016 9:10 PM P...	Completed (753 leads qualified)			
Completed	August 16, 2016 9:10 PM P...	Completed (249 leads qualified)			
Completed	August 15, 2016 9:10 PM P...	Completed (631 leads qualified)			
Completed	August 14, 2016 9:10 PM P...	Completed (64 leads qualified)			
Completed	August 13, 2016 9:10 PM P...	Completed (107 leads qualified)			
Completed	August 12, 2016 9:10 PM P...	Completed (548 leads qualified)			
Completed	August 11, 2016 9:10 PM P...	Completed (1991 leads qualified)			
Completed	August 10, 2016 9:10 PM P...	Completed (672 leads qualified)			
Completed	August 9, 2016 9:10 PM PDT	Completed (354 leads qualified)			
Completed	August 8, 2016 9:10 PM PDT	Completed (388 leads qualified)			
Completed	August 8, 2016 12:21 PM P...	Completed (188357 leads qualified)			

Sync Marketo Lists to AdRoll

Lists show up in AdRoll. Use for audience targeting and prospecting campaigns



The screenshot shows the AdRoll interface with the 'Audience' tab selected. At the top, there are navigation tabs: 'All Campaigns', 'Prospecting', 'Retargeting', 'Ads', and 'Audience'. Below the navigation, there are filters for 'New Visitors' (selected) and 'Total Conversions', along with a 'SETTINGS' button. The main section is titled 'Visitor Segments' and features a search bar containing 'marketo' and a dropdown menu set to 'CRM Emails'. It indicates '9 matching results'. Below this is a table with columns for 'Conversion', 'Name', and 'Segment Rule'. The table lists nine segments, each with a unique name and the number of emails uploaded along with the upload date.

Conversion	Name	Segment Rule
	marketo-18252-adroll---crm-onboarding---us-strategic-customers	55,143 emails uploaded 9/11/2015
	marketo-27347-global---crm-onboarding---strategic-account-contac	69,460 emails uploaded 12/18/2015
	marketo-29226-2015-customers-for-app_adroll	15,900 emails uploaded 1/22/2016
	marketo-30086-adroll_house_-_1_nurture__marketplace	196,790 emails uploaded 8/17/2016
	marketo-30087-adroll_house_-_2_mq__hunting	82,918 emails uploaded 8/3/2016
	marketo-30088-adroll_house_-_3_working__negotiation	42,515 emails uploaded 8/3/2016
	marketo-30089-adroll_house_-_4_account_sign_ups_no_spend	3,223 emails uploaded 8/3/2016
	marketo-30090-adroll_house_-_5_spending_customer	21,264 emails uploaded 8/3/2016