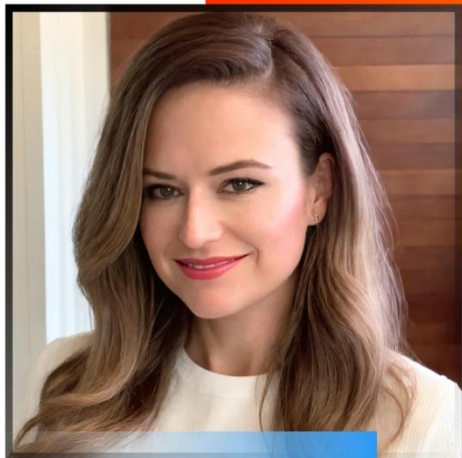


Clean data, closed deals: Building a data hygiene strategy for Marketo Engage and CRM Sync

Why clean data matters

Adobe

Introductions

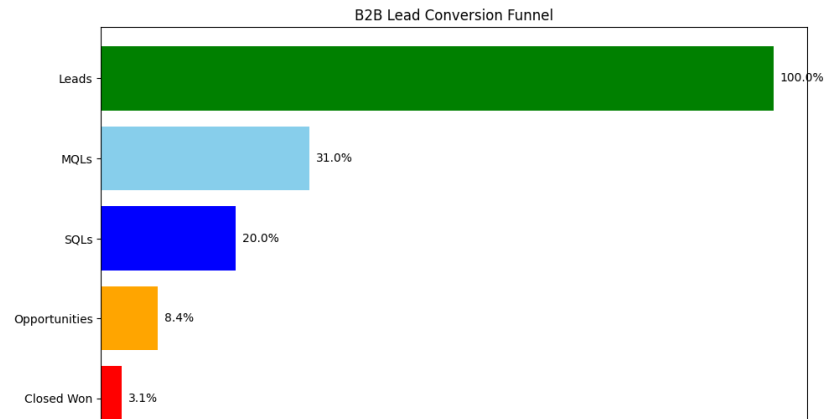
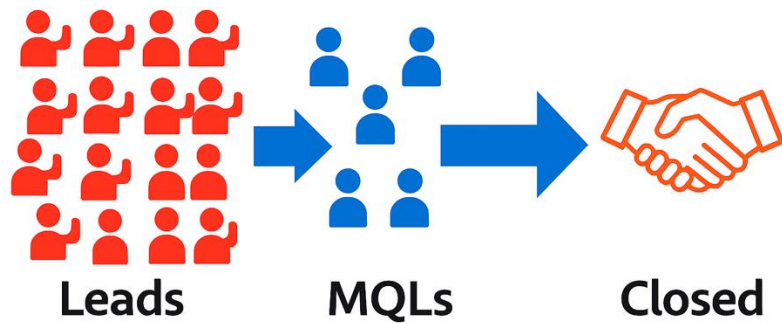


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Qualcomm

Senior Marketing Manager
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Why clean data matters



Why clean data matters

- **Sales and Marketing success**

Clean data is essential for effective marketing and sales operations, ensuring better decision-making and customer interactions.

- **Impact of poor data hygiene**

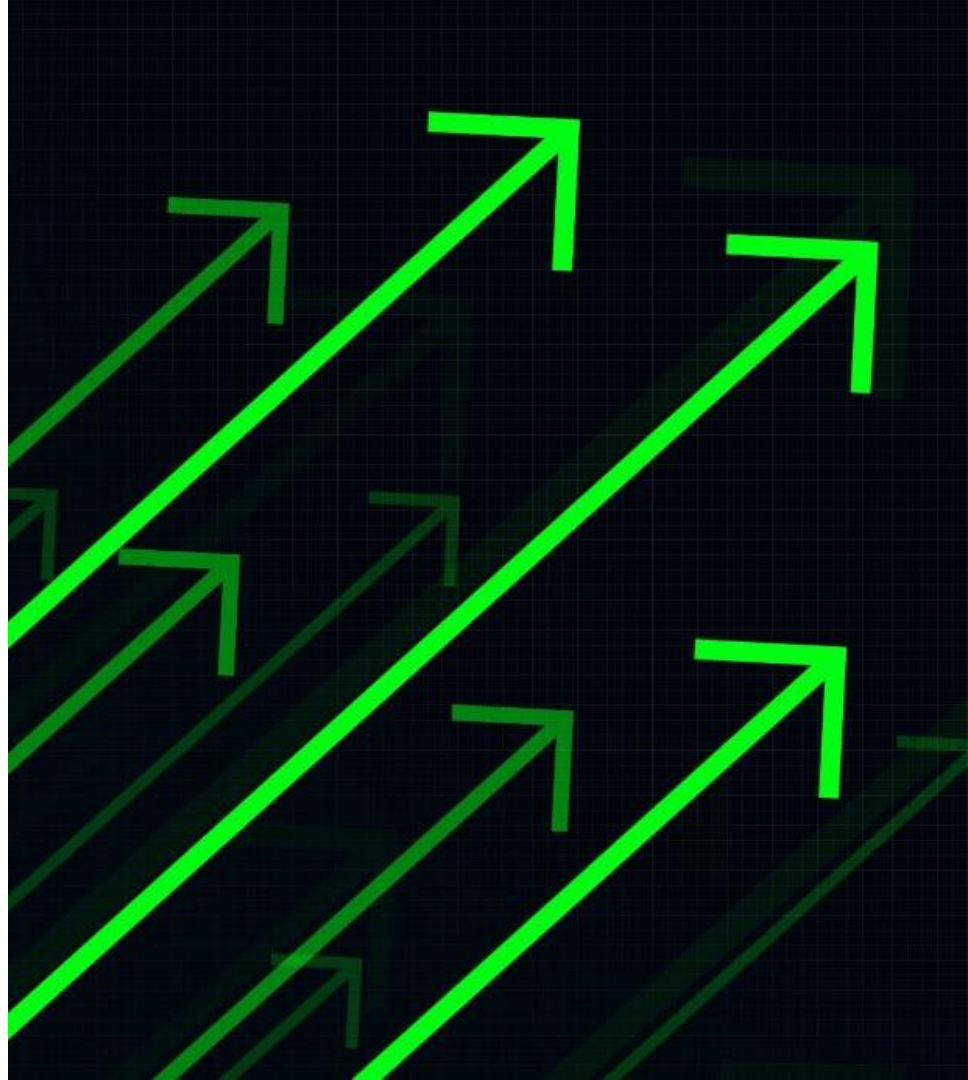
Poor data hygiene causes inefficiencies, missed opportunities, and degrades customer experience in business processes

- **Syncing Marketing and Sales**

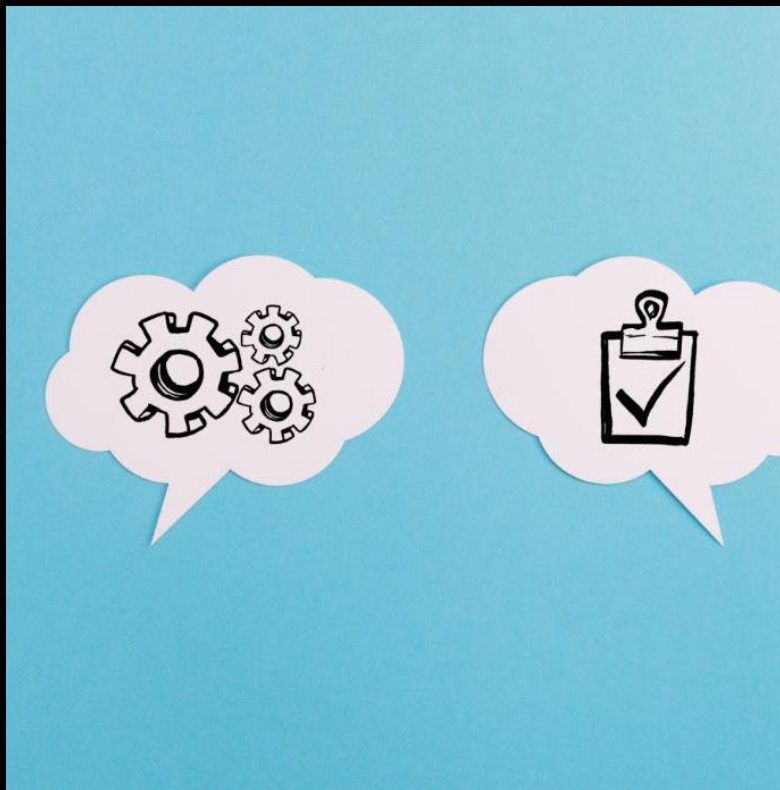
Accurate data enables effective syncing of marketing leads to sales CRM, accelerating deal closures and revenue growth.

- **Strategic business imperative**

Maintaining clean data is a strategic imperative that drives business success beyond just technical needs.



Common data hygiene challenges



- **Duplicate records issue**

Duplicate records cause confusion and decrease operational efficiency in data management

- **Incomplete and inconsistent data**

Incomplete or inconsistent field values obstruct segmentation and personalization efforts.

- **Sync errors between systems**

Synchronization errors between Marketo Engage<>Salesforce disrupt lead flow and hurt reporting accuracy.

- **Lack of standardized processes**

Without standardized processes, teams handle data inconsistently, lowering data quality.

A solid red vertical bar is located on the far left side of the image, extending from the top to the bottom.

Building data hygiene strategy

My strategic framework for data hygiene



- **DO NOT RUSH...**

- **People and collaboration**

Collaboration between Marketing Operations and CRM Administrators ensures shared ownership and accountability for data hygiene.

- **Establish data standards**

Define clear guidelines for data entry including required fields, formatting, and blocking unreliable source updates.

- **Process and workflows**

Establishing repeatable workflows maintains consistency and efficiency in managing data hygiene processes.

- **Conduct regular data audits**

Perform audits focusing on empty fields, lead inactivity, and invalid emails using specialized reporting tools.

- **Train and document processes**

Provide stakeholder training and document hygiene processes to ensure consistency and accountability organization-wide.

My strategic framework for data hygiene – Establishing data standards

▪ Defining data standards

Clear data standards specify required fields, formatting rules, and templates for consistent data entry.

Country	Country Code	United States	Canada Provinces
Andorra	AD	Alabama	Alberta
United Arab Emirates	AE	Alaska	British Columbia
Afghanistan	AF	Arizona	Manitoba
Antigua and Barbuda	AG	Arkansas	New Brunswick
Anguilla	AI	California	Newfoundland and Labrador
Albania	AL	Colorado	Northwest Territories
Armenia	AM	Connecticut	Nova Scotia
Angola	AO	Delaware	Nunavut
Antarctica	AQ	District of Columbia	Ontario
Argentina	AR	Florida	Prince Edward Island
Austria	AT	Georgia	Quebec
Australia	AU	Hawaii	Saskatchewan
Aruba	AW	Idaho	Yukon Territories
Aland Islands	AX	Illinois	
Azerbaijan	AZ	Indiana	
Bosnia and Herzegovina	BA	Iowa	
Barbados	BB	Kansas	
Bangladesh	BD	Kentucky	
Belgium	BE	Louisiana	
Burkina Faso	BF	Maine	
Bulgaria	BG	Maryland	
Bahrain	BH	Massachusetts	

Role	Employee Range	Annual Revenue Range	Industry
Developer	Self-employed	Empty Value	Zoological Gardens
Distributor/Partner	1-10 employees	\$1 - \$1M	Wholesale Trade – Nondurable Goods
Educator	11-50 employees	\$1M - \$5M	Wholesale Trade – Durable Goods
Engineer: Applications	51-200 employees	\$5M - \$10M	Water Transportation
Engineer: Component	201-500 employees	\$10M - \$25M	U.S. Postal Service
Engineer: Design	501-1,000 employees	\$25M - \$50M	Trucking & Warehousing
Engineer: Hardware	1,001-5,000 employees	\$50M - \$100M	Transportation Services
Engineer: Software	5,001-10,000 employees	\$100M - \$250M	Transportation Equipment
Engineer: Systems/Integrator	10,001+ employees	\$250M - \$500M	Transportation by Air
Executive		\$500M - \$1B	Tobacco Products

My strategic framework for data hygiene – Establishing data standards

- Ensuring data integrity

Blocking updates from unreliable sources preserves data accuracy and reliability in the system.

The image illustrates the process of blocking updates from unreliable sources in Adobe Marketo Engage to ensure data integrity.

Field Configuration (Country):

Field Name	Value
Type:	String
SOAP API Name:	Country
REST API Name:	country
List Import Alias:	[Redacted]
CRM Field Map:	Country (SFDC Lead)
Block Updates From:	Untrusted Import list Web service API

Field Management Menu:

- Field Actions
- New Custom Field
- Block Field Updates
- Edit Import Aliases
- Merge Fields
- Change Type
- Export Field Names
- Export All Objects
- Export Used By

Block Updates From Dialog:

Updates from the checked items are not allowed.

Input Sources:

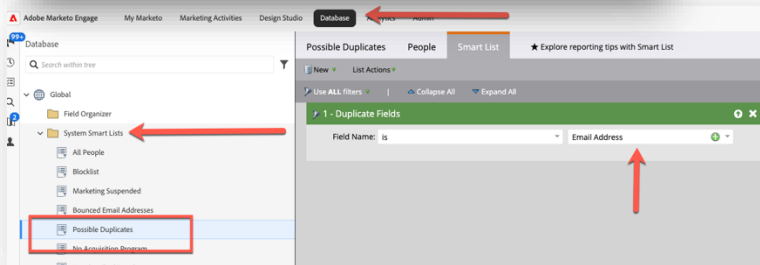
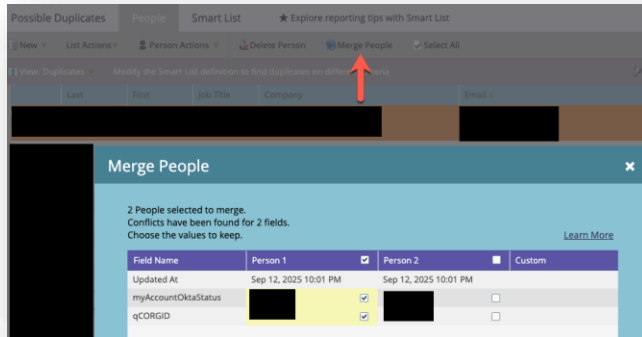
- ☐ Munchkin API
- ☐ List Import trusted source
- ☒ List Import untrusted source
- ☐ Form fillout
- ☐ Flow change data value
- ☐ Custom Flow Action
- ☐ Salesforce sync
- ☐ Person detail update
- ☒ Web service API
- ☐ Web service API - Import to list
- ☐ Webhook Update
- ☐ Chat
- ☐ Adobe Experience Platform

My strategic framework for data hygiene – Establishing data standards

▪ Deduplication

Use deduplication processes with key identifiers.

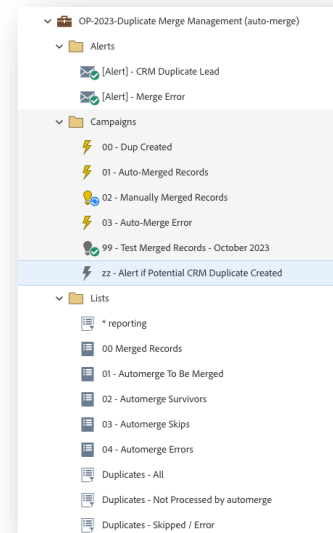
▪ Manual Deduplication



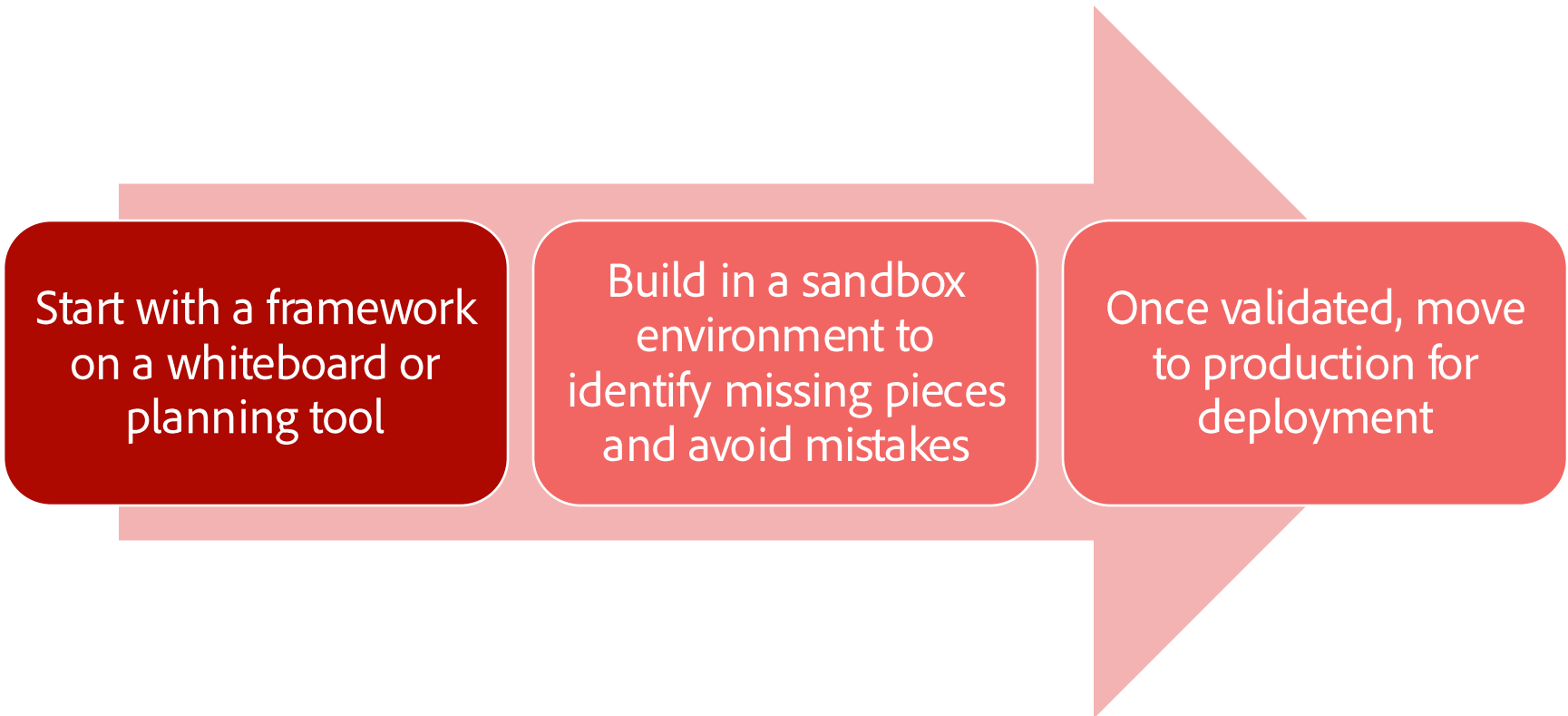
▪ Automated deduplication solutions

Organizations can implement automated deduplication with

- Custom solutions via Adobe Professional Services
- Build in house via Marketo API
- 3rd party vendor such as Ringlead, Cloudingo



My strategic framework for data hygiene – Building workflows



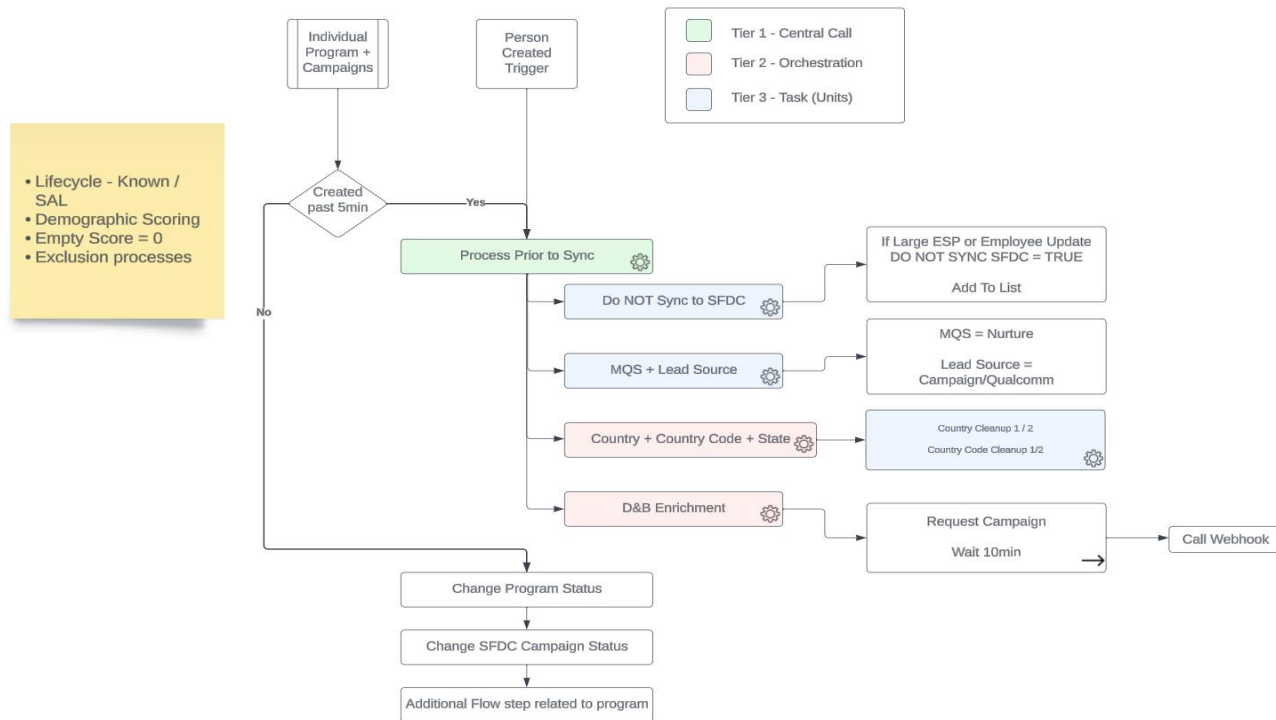
Start with a framework
on a whiteboard or
planning tool

Build in a sandbox
environment to
identify missing pieces
and avoid mistakes

Once validated, move
to production for
deployment

My strategic framework for data hygiene – Building workflows

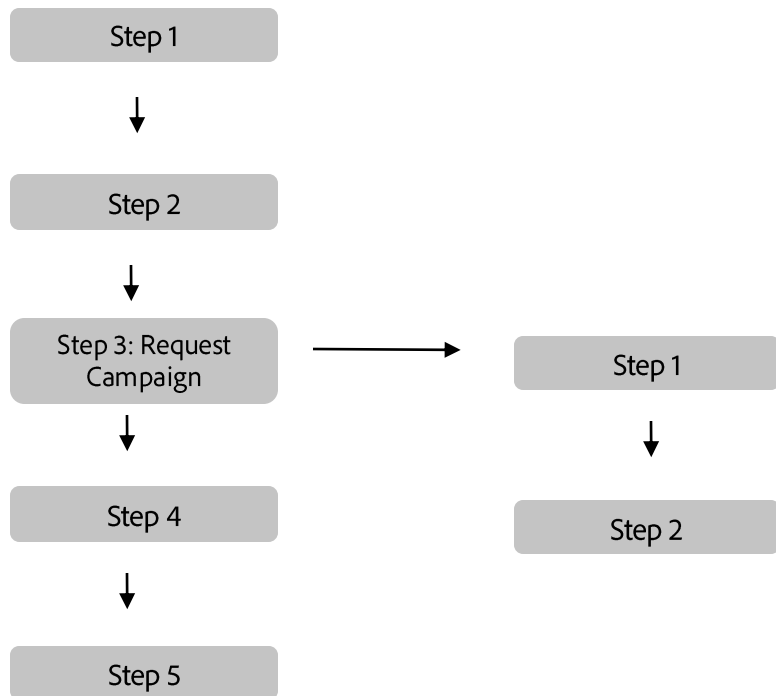
▪ Data hygiene whiteboard example



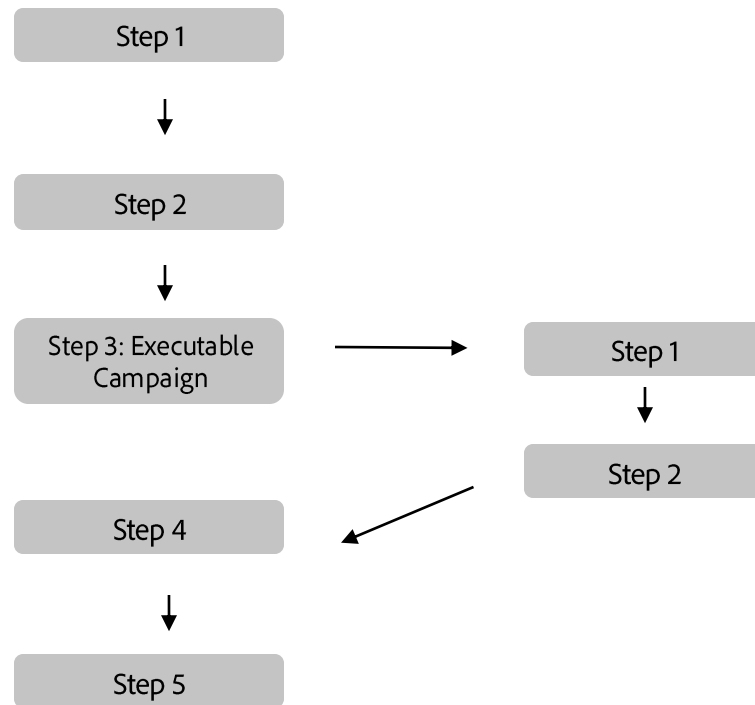
Which one is better ????



Request Campaign



Executable Campaign



Which one is better ????



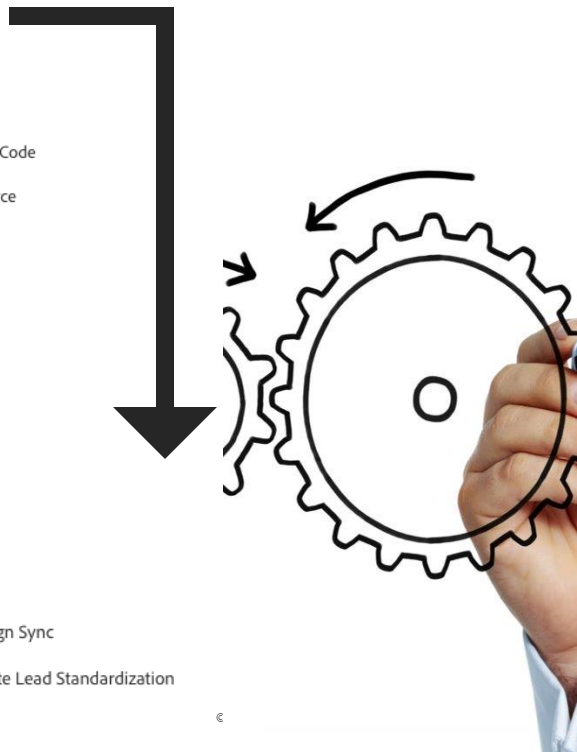
Request Campaign

⌵	📁 OP-Data Management_Req
⚡	00-Req_Parent-Campaign Sync
⚡	00.01-Req_Exclusion-Employees
⚡	00.02-Req_Exclusion-Large ESP Domains
⚡	01-Req_Do Not Sync
⚡	02-Req_Lead Source
⚡	03.01-Req_Country Cleanup
⚡	03.02-Req_Country Code Cleanup
⚡	03.03-Req_State Cleanup - US/CA
⚡	04.01-Req_MQS Filled Out Form
⚡	04.02-Req_MQS Nurture



Executable Campaign

⌵	📁 OP-Data Management_EXE
>	00-Executable Process
>	01-MKTO Exclusion
>	02-Lead Source
>	03-Country - State - Country Code
>	04-Market Qualification Source
>	05-Record Type ID
>	06-SFDC Is Created
>	07-Employee Range
>	08-Annual Revenue
>	09-Role
⌵	📁 OP-Data Management_EXE
⌵	📁 00-Executable Process
⚡	* Person Is Created
💡	00-EXE_Parent-Campaign Sync
💡	99-EXE_Parent-Complete Lead Standardization



Which one is better ????



Request Campaign +



Executable Campaign

1 - Change Data Value

Add Choice

Attribute:

New Value:

2 - Add to List

Add Choice

List Name:

3 - Request Campaign

Add Choice

Choice 1

If: is

Requested Campaign:

Which one is better ????



Request Campaign +



Executable Campaign

Choice 1 ▾

If: **mkto_Is Employee** ▾ is ▾ true ▾

Executed Campaign: **-- Do Nothing --** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Choice 2 ▾

If: **DO NOT SYNC SFDC** ▾ is ▾ true ▾

Executed Campaign: **-- Do Nothing --** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Default Choice

Executed Campaign: **OP-Data Management_EXE.I** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Note: Only the first matching choice applies

6 - Execute Campaign ⓘ ✕

Add Choice

Choice 1 ▾

If: **Large ESPs_Student_I** ▾ is ▾ (2) 03 IN SFDC_IS LARGE ESP; 06 N

Executed Campaign: **OP-Data Management_EXE.I** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Default Choice

Executed Campaign: **-- Do Nothing --** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Note: Only the first matching choice applies

7 - Execute Campaign ⓘ ✕

Add Choice

Choice 1 ▾

If: **DO NOT SYNC SFDC** ▾ is ▾ true ▾

Executed Campaign: **-- Do Nothing --** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Default Choice

Executed Campaign: **OP-Data Management_EXE.I** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Note: Only the first matching choice applies

8 - Execute Campaign ⓘ ✕

Add Choice

Choice 1 ▾

If: **Person Source** ▾ is ▾ (16) 6Sense; Business Developme

Executed Campaign: **-- Do Nothing --** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Default Choice

Executed Campaign: **OP-Data Management_EXE.I** ▾ Use Parent Campaign Token Context: **false** ▾ ✕

Note: Only the first matching choice applies

Which one is better ????



Request Campaign +



Executable Campaign

The screenshot displays a sequence of three workflow steps in Adobe Campaign. The first step, '19 - Execute Campaign', includes a dropdown for 'Executed Campaign' set to 'OP-Data Management_EXE.99-' and a checkbox for 'Use Parent Campaign Token Context' set to 'false'. A black arrow points from this step to the second step, '1 - Remove from List', which has a 'List Name' dropdown set to 'OP-Data Management_EXE.99-Data Standardization In Progress'. The third step, '2 - Change Data Value', shows an 'Attribute' dropdown set to 'mkto_Operational Notes' and a 'New Value' dropdown set to '<----- End of Record Standardi'.



Champion Tip: There's no strict limit on the number of flow steps you can use in a Smart Campaign, but it's best practice to keep it under 25–30 steps to avoid long processing time.

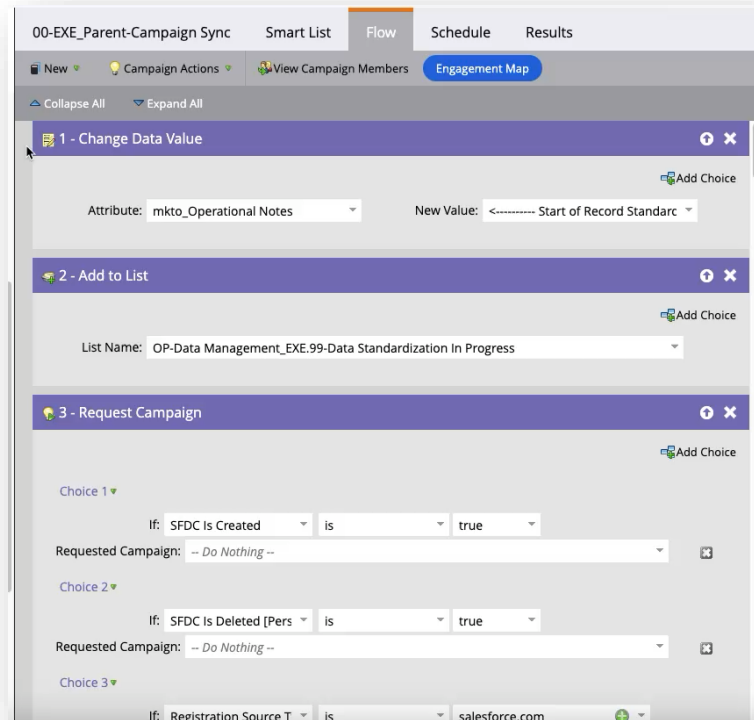
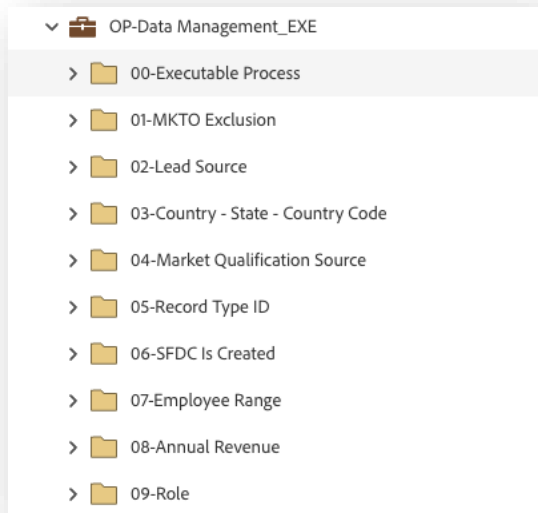
Which one is better ????



Request Campaign +



Executable Campaign

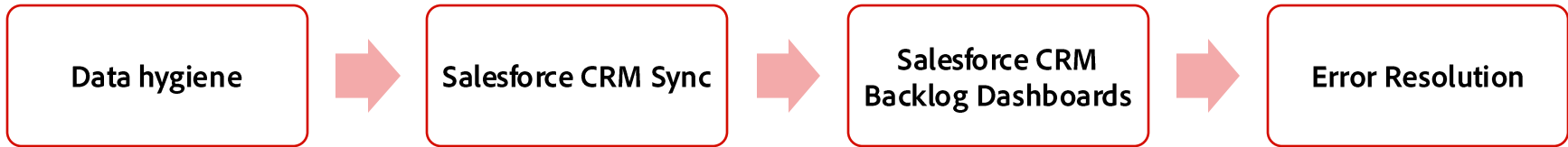


A solid red vertical bar is located on the far left side of the image, extending from the top to the bottom.

**From process to
performance: Monitoring
your data hygiene in action**

From process to performance – Monitoring your data hygiene in action

- After building your data hygiene workflow, monitoring is essential.
- Salesforce CRM sync failures often result from incorrect picklist values (e.g., Country, State).
- Use the Salesforce CRM Backlog Dashboards in Marketo Engage to identify and resolve sync issues.
- Proactive monitoring ensures data quality and smooth lead flow



From process to performance – Monitoring your data hygiene using Salesforce CRM Backlog Dashboards

- Real-time sync monitoring

Dashboards display live sync status, backlog trends, and error types to quickly identify issues.

- Issue identification and prevention

Admins can detect spikes in failed syncs and validation errors to prevent escalation.

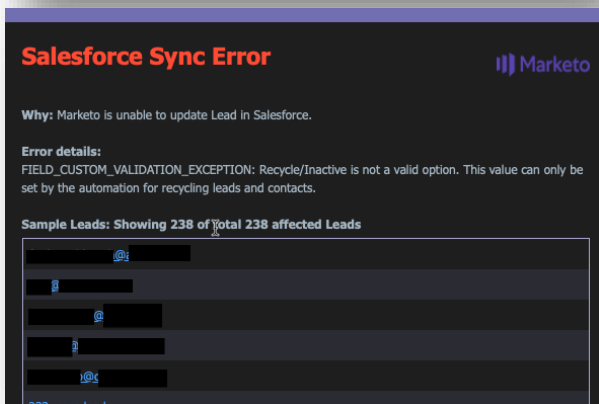
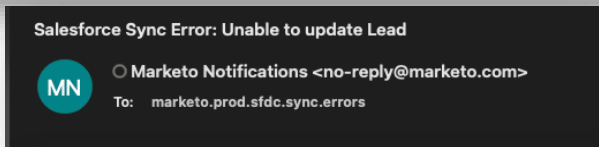
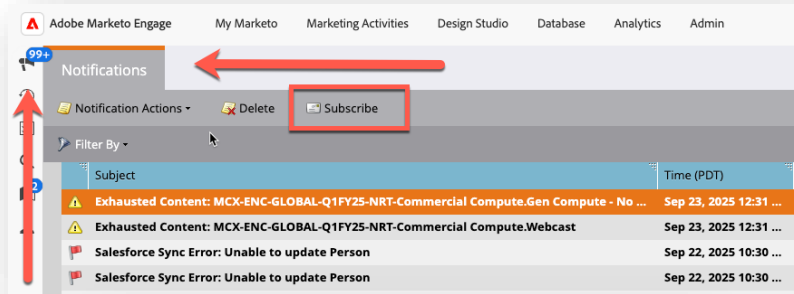
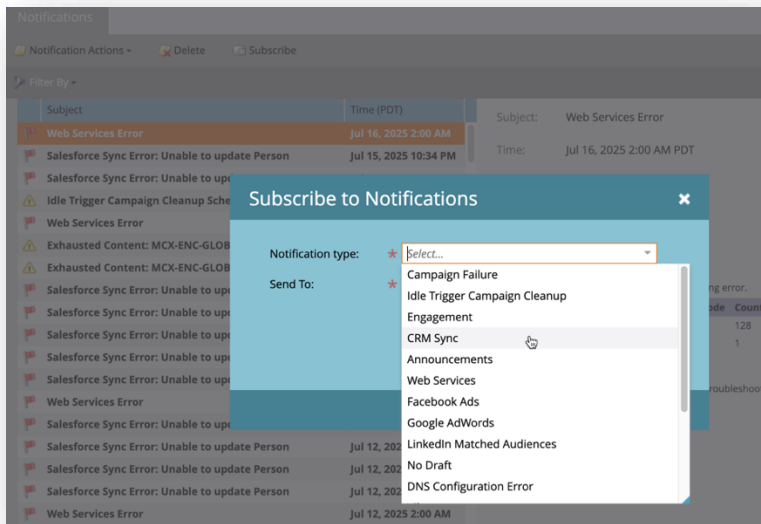
Sync Throughput and Backlog (Last 24 hours)								
Object	Max records sy	Min recor	Average r	Sync Back	Estimated Sy	Backlog last fetch	Backlog next fe	Backlog Statu
Campaign Member Status	6	6	6	0		Sep 23, 2025 11:...	Sep 23, 202...	Normal
Lead	553	19	112	47	0 hr 25 min	Sep 23, 2025 11:...	Sep 23, 202...	Growing
Lead Queue	0	0	0	120		Sep 23, 2025 11:...	Sep 23, 202...	Normal

Salesforce	Sync Backlog Trend	Sync Throughput and Backlog	Sync Status	Sync Errors
Filter by: Date and Time (PDT) - 0				
Failed On (PDT)	Error Type	Error Details	Marketo ID	
September 23, 2025 7:24:56 ...	Record Level	FIELD_CUSTOM_VALIDATION_EXCEPTION: Recycle/Inactive is not a valid option. This value can only ...	80801604	
September 23, 2025 7:24:56 ...	Record Level	FIELD_CUSTOM_VALIDATION_EXCEPTION: Recycle/Inactive is not a valid option. This value can only ...	80861229	

From process to performance - Monitoring your data hygiene in action with alerts

- Stay proactive

Set up alerts to get CRM sync error notifications directly in your email.



Key takeaways

Summary of best practices

- ❑ **Establish clear data standards**

Set and enforce standards with all stakeholders to ensure consistent, accurate data across systems.

- ❑ **Define your data hygiene process**

Identify what your process must address—deduplication, enrichment, incomplete/wrong values, field validation, etc.

- ❑ **Plan, test, deploy**

Map everything out on a whiteboard, build it in a sandbox, then move it to production.

- ❑ **Choose the right approach**

Select Trigger/Batch + Request campaigns for simple needs; Executable campaigns for complex scenarios.

- ❑ **Monitor & audit regularly**

Use Marketo Engage's CRM Sync Status, Notifications, and regular audits to catch and resolve issues early.

- ❑ **Train & document**

Train teams and document processes to ensure accountability and consistency.



Adobe