Setting Up Your

Banjo-Marketo Engage Integration

Adding direct mail to your digital campaign can increase your ROI by as much as 20%. But who has time to manage the data, copy, artwork, and approvals that come along with sending one-off direct mail campaigns? It's cumbersome and time-consuming. So let Banjo do the work for you.

Banjo makes it possible for you to automatically trigger relevant direct mail from your CRM using Marketo Engage webhooks. Send the right message to the right person at the right time—without adding to your to-do list. After the initial integration, you're free to focus on more important, revenue-generating activities. Here's how it works:

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Step One: Set up a Banjo site

We'll set up your Banjo site with a branded dashboard where you'll be able to monitor your webhooks and data queue. Then, we'll send you the URL and API key you'll need to program the Marketo Engage webhook in your Smart Campaign.

WHAT YOU'LL NEED TO DO:
- Provide brand assets and guidelines
- Confirm admin user(s) information for account setup

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Step Two: Review direct mail art & define timing

We'll review your direct mail artwork and data to ensure we have a clear understanding of the deliverable and how the data flows into that template. We'll also ask about your order volume and frequency to inform the data management plan and the schedule to ensure timely delivery of your direct mail.

WHAT YOU'LL NEED TO DO:
- Send print files with sample JSON data
- Determine how each data field will customize your direct mail piece
- Decide when and how you want to trigger a campaign: Is it based on timing? Will orders need to hit minimum quantities for each campaign?

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Step Three: Create Banjo a webhook

With your new Banjo site, you're ready to create and test a webhook to share JSON data.

WHAT YOU'LL NEED TO DO:
- Create a Banjo webhook (e.g., "Send Banjo Postcard") in Marketo Engage
- Turn on the webhook to send test data to Banjo
- Log into your Banjo dashboard to verify the data feed matches what you're expecting

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Step Four: Set up Direct Mail Templates

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Once we have final artwork and the webhook and JSON data have been verified, we will program your direct mail template and the campaign rules.

WHAT WE'LL DO:

- Map the data fields to the variable data points in your templates
- Define list processing requirements of your data (e.g., NCOA, CASS, BCC) for optimal presort postage rates
- Define print specs with relevant workflow requirements
- Program the conditions to trigger the data and process the print order

Step Five: Test & Launch

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Finally, we'll test to confirm the webhook is working properly and data is flowing into the template accurately. Together we will audit the process and print proofs until you approve the campaign for launch. Once the Banjo-Marketo Engage integration is live and operational, sit back and watch your ROI climb.

So, what are you waiting for?

Call or email us to start your Banjo-Marketo Engage integration today.

(571) 527-4172
contact@printwithbanjo.com

FAQ

Q: What is the processing time between triggering a campaign in Marketo Engage and a mailer going out?

A: Processing time is predetermined by the rules of the webhook for each campaign. Most rules are either time-based (e.g., every day at 3pm) or quantity-based (e.g., when the webhook queue reaches a predetermined minimum number of records). Once triggered, the production time varies from 1-3 days based on the complexity of the deliverable and the estimated quantity.

Q: How does data processing and postage work?

A: Banjo automates the process of NCOA (National Change of Address) appending and CASS (Coding Accuracy Support System) address updating. This is a requirement for presort mail and reduces postage significantly. We will set up a postage escrow account for you to finance ongoing postage needs. Based on your project volumes and postage expense, we'll communicate postage requirements to ensure smooth processing.

Q: How can we track the mail or see the processed data?

A: Banjo provides the option for USPS Track and Trace mail tracking. With this service, we can provide a daily CSV file of delivery information for individual mailing pieces or the option to search for specific mailing IDs through the Banjo dashboard. Mail tracking adds approximately 1.5 cents per mailing piece, so many clients choose to track a sample of records in specific geographic regions to gauge delivery times.

Q: What is your volume capacity?

A. We process anywhere from a few hundred to tens of thousands of pieces per campaign, per client daily. Our largest data automation client processes approximately 40,000 records per day/six days per week. Print automation programs can vary significantly when it comes to volume and the complexity of the deliverable.

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