



Triblio's Welcome Kit

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Welcome to Triblio!

It's just a few days before you officially kickoff with our Client Success Team, but if you're eager to get a head start, this guide is for you. And if you're too busy, don't sweat it, we'll get you caught up after kickoff.

Now let's get started.

As you know, Triblio enables account based marketing (ABM) throughout digital channels to generate demand and ultimately revenue from your target accounts. The change to an account based strategy is long overdue, and we think you're going to see great results – and have some fun along the way – reimagining your digital channel with our team.

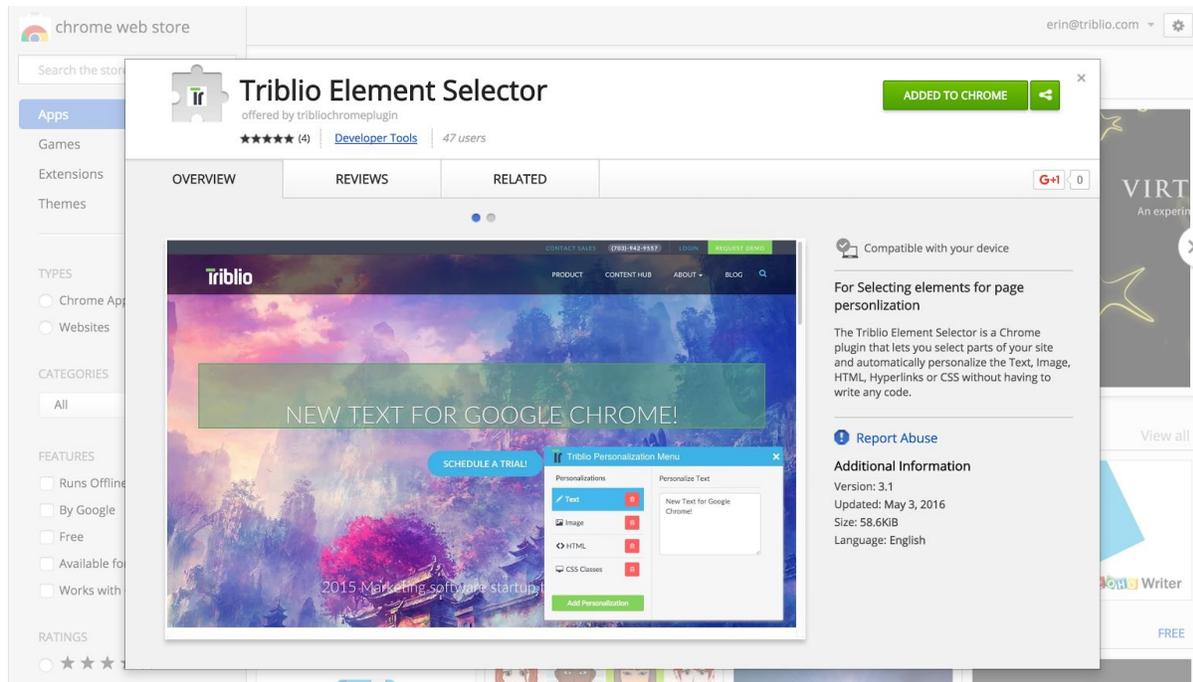
Your Client Success Manager (CSM) will guide you through a strategy process during your onboarding, but here are a few things this guide will help you do in the meantime:

1. Login and explore the application
2. Prepare a sample campaign
3. Initiate technical integration with your existing systems
4. Collect important information for your Triblio onboarding process

Ready to get things started?

Step 1

Login and Explore



First, fire up a Google Chrome browser and load our Chrome Extension at triblio.com/triblio-element-selector. This tool is necessary to take advantage of Triblio's most cutting-edge editing and previewing features.

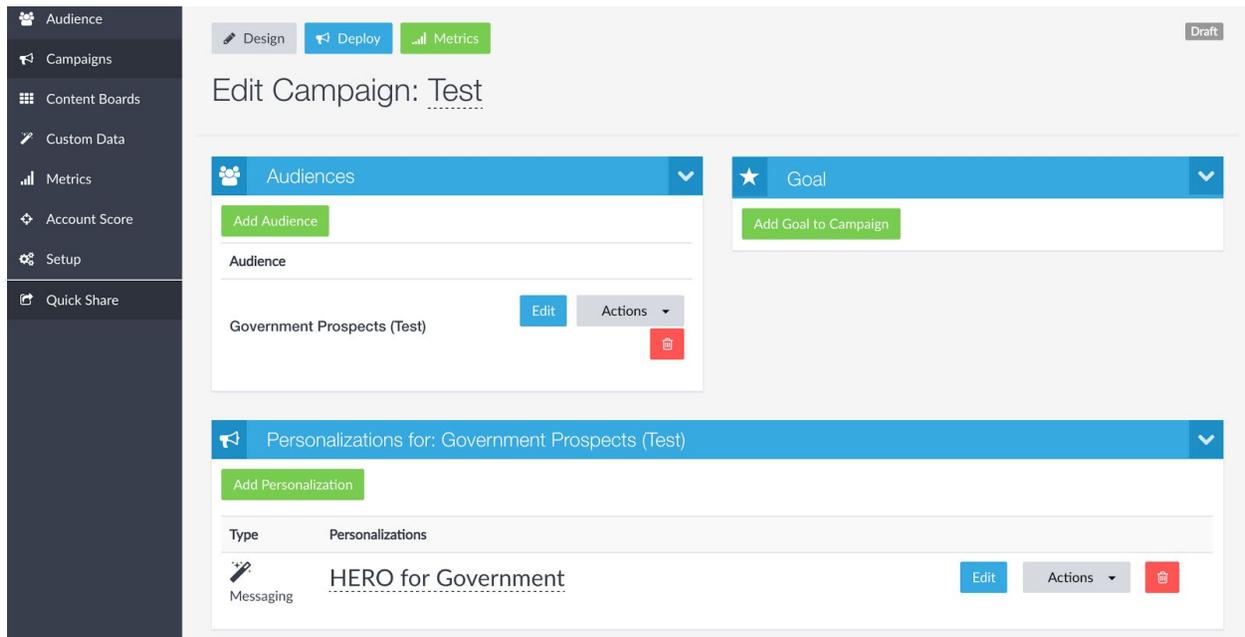
Once that is done, you can setup an account by clicking on the link in your "Welcome to Triblio" email. (If you didn't receive one yet, let your account executive know.)

Now go ahead and click around a bit in the app to familiarize yourself with the different sections. In step 2, we will go over how to build your first campaign. It won't change anything on your website yet (you have to finish Step 3, integrating scripts, for that), so now is your chance to experiment risk free.

When you're done poking around, we can start your first campaign.

Step 2

Prepare a Campaign



This section walks you through how to set up an example campaign that shows various offers to anonymous visitor from Government institutions.

Reminder: Use of the campaign editing and preview tools requires Google Chrome

Build an Audience

The first part of any campaign is defining the target audience. For this practice run, we will create an audience comprised of anonymous visitors from Government institutions. Go to the Audience section of the app and click New Audience. Name the audience "Government Prospects (test)" and click Create.

Now it's time to choose the criteria for the audience. Click the "Industry" button and in the search bar that appears, type 'Government'. A categorized list of the government organization divisions appears. Select the All Government Codes option and click add. Your audience will now include any visitors whose IP address maps to a Government institution.

Create Personalizations

Go to the campaign area of the app and click New Campaign. Name the campaign "Test" and click Create. You will now see the Campaign Editor screen.

Add the Audience

In the Campaign editor, first add the "Government Prospects (test)" audience we just created. Click the Add Audience button and a light box listing all the audiences will appear. Select the audience you created and then click Add. Once the audience is added to the campaign, you will see a blue box appear at the bottom of the screen. It is empty now, and that is where you will add a Campaign Element for the audience.

Add a New Campaign Element

Get started by clicking Add Campaign Element button. The modal that appears will ask you to name the Campaign Element and select a type for it.

- Messaging - changes out text, images, and other elements of your existing website content
- Card Sets - create and insert Pinterest-style resource boards
- Overlay CTAs - inject slide-in cards, popup offers and forms, or persistent header/footer elements on any page
- Retargeting - creates retargeting lists for your AdWords campaigns
- Redirect - forwards a page to a new URL, landing page, or content hub
- Ads - create and manage account based display ads through digital channels

For this element, use the name "Hero for Government" and select the Messaging option. An element named "Hero for Government" will now appear for your audience, and you can click the Edit button to open up the editor for it.

Set the Location

In the Messaging Editor interface, you can select the location(s) where this element will appear. In this simple campaign, we will deploy only to a single location, your home page. Click Add Single Location, type in your company's home page URL, and then click Add.

When you've done this, a green button will appear beneath with the text "Personalize (your company's URL)..."—click on that. Your website will now load in a new tab along with Triblio's visual editor. To start making edits, just click any element on your webpage and, depending on the element selected, choose to personalize text, images, links, or HTML.

For this campaign, select the messaging text on your website and Edit Text so it is relevant for a government audience. Go ahead and change some images and links as well to get a good feel for the tool.

When you are finished customizing your website for your government test audience, you can exit out of the page (the updates automatically save). If this were a live campaign you would go back to the campaign builder and go to Deploy and then click Activate. But, for now, the scripts aren't on your site so none of these changes will be displayed.

This leads us straight into the Technical Setup process.

Step 3 Setup

The screenshot shows the 'Triblio Setup Wizard' interface. At the top, there is a blue header with the title 'Triblio Setup Wizard'. Below the header is a green button labeled 'Back to the App'. A navigation bar contains four green tabs: 'Users', 'Web Sites & API', 'Data Integrations', and 'Salesforce'. The 'Web Sites & API' tab is currently selected. The main content area is titled 'Message Element Deployment' and contains a text area with the following code:

```
<script type="text/javascript" data-cfasync="false" src="//triblio/h.js?orgId=...&appId=..."/></script>
```

 Below this code is a note: 'Place this embed code in the head tag of all pages where you want to deploy campaigns'. The next section is titled 'Overlay Element Deployment' and contains a text area with the following code:

```
<script type="text/javascript" data-cfasync="false" src="//triblio/footer.js?orgId=...&appId=..."/></script>
```

 Below this code is another note: 'Place this embed code at the end of the body tag in all pages where you want to deploy campaigns'.

Embed Triblio Javascript on Your Website

For Triblio to detect and target accounts on your website, you will need to add three scripts to all of your pages. Two of the scripts manage campaign elements, audiences, and analytics and the third integrates Triblio's analytics with Google Analytics.

Adding Campaign Element Scripts

Go to "Setup" in Triblio and navigate to the "Web Sites & API" tab. Here you'll see the two scripts to embed.

The first code is labeled "Message Element Deployment". This needs to be inserted at the top of the <head> tag in every page. Do not use a tag manager to inject this code — they run too slowly and will cause screen flicker.

The second code is labeled "Overlay Element Deployment" (and also handles analytics). This code must be inserted in the <body> tag in every page, wherever is convenient.

Both scripts should be deployed and tested on a staging site before going into production and never be deployed inside a SaaS web application without consulting our engineering team.

Integrate Triblio and Google Analytics

Triblio integrates with Google Analytics to give metrics visibility to your entire team and break down account behavior with the functionality of Google Analytics. In order for Triblio to pass account information to Google Analytics, a script needs to be added to the head tag of all pages.

Go to "Setup" in Triblio and navigate to the "Web Sites & API" tab. At the bottom of the page, enable "Third Party Firmagraphic Tracking". Once enabled, a script will appear. Add that script to all web and landing pages.

In Google Analytics, navigate to Admin and under Property click Tracking Info. A list of options will appear. Choose Tracking Code. Paste the Tracking ID into Triblio to the left of the Google Analytics script where the placeholder text reads "GA Tracking ID".

Your CSM will help you set up account data to push to Google Analytics and build custom reports off of those lists.

Integrate your Marketing Automation system

Triblio integrates with your marketing automation to allow you for cookie-level targeting of known contacts, cross-channel campaign extension, and more accurate targeting of different segments.

Find your marketing automation platform below for integration guidance.

For all marketing automation tools, integrate them with Triblio by navigating to Setup then Data Integrations in the app. Write in the required information.

Eloqua Integration

Integration with Eloqua is handled through an app in the Oracle Cloud Marketplace.

- In Triblio, navigate to Setup then Data Integrations. Click Authorize Triblio under Eloqua Integrations and then authorize.
- To verify the integration, go to the Audiences section of Triblio and create a new audience called "MA Test". Add a criterion using the "Marketing Automation" button and select "Eloqua Segment". Now click on the "Marketing Automation" field that appeared to the left. When the modal loads, you should see a list of recently edited Eloqua segments. This confirms the integration was successful.
- Finally, add an admin account for `api+[your-company-name]@triblio.com` so we can test lists and forms.

Marketo Integration

Integration with Marketo is handled through Marketo's REST API.

- Follow [these instructions](#) from Marketo to find your Client ID, Client Secret, and Marketo Base URL.
- To verify the integration, go to the Audiences section of Triblio and create a new audience called "MA Test". Add a criterion using the "Marketing Automation" button and select "Marketo Segment". Now click on the "Marketing Automation" field that appeared to the left. When the modal loads, you should see a list of recently edited Marketo segments. This confirms the integration was successful.
- Finally, add an admin account for `api+[your-company-name]@triblio.com` so we can access and test lists and forms.

Hubspot

- Add an admin account for `api+[company]@triblio.com` so that we can set up your integration, access lists, and test lists and forms.

Pardot Integration

- In the Data Integration section in Triblio's Setup, write in the email, password, and user key to integrate Triblio with Pardot.
- Add an admin account for `api+[company]@triblio.com` so we can access and test lists and forms.

ExactTarget

- Login to your Exact Target account and locate the ClientID and Client Secret. Save them in Triblio's Setup to complete integration.
- Add an admin account for `api+[company]@triblio.com` so we can access and test lists and forms.

Mailchimp

- In Mailchimp, locate your api key and type it in the Data Integrations section in Triblio's setup. Save the key and it will be integrated.

- Add an admin account for `api+[company]@triblio.com` so we can access and test lists and forms.

Create Marketing Automation lists

There are several segments that are universally useful for Triblio campaigns, so get a head start by creating those accounts.

- "Triblio – Target Accounts"
- "Triblio – Internal Staff"
- "Triblio – All Contacts"

Marketo users! Please note that Marketo only shows Static Lists in its API, so these lists should not be created as Smart Lists. You can use [these instructions](#) for tips on setting these up and keeping them neatly maintained.

Integrate Salesforce

Salesforce Marketing Cloud

- Navigate to Salesforce in Triblio's Setup and click Authorize Triblio under Salesforce.com CRM Integration. You will be redirected to Salesforce. Sign in and hit allow to integrate.
- Let your CSM know which field(s) in Salesforce account domains are stored in so proper syncing can occur.

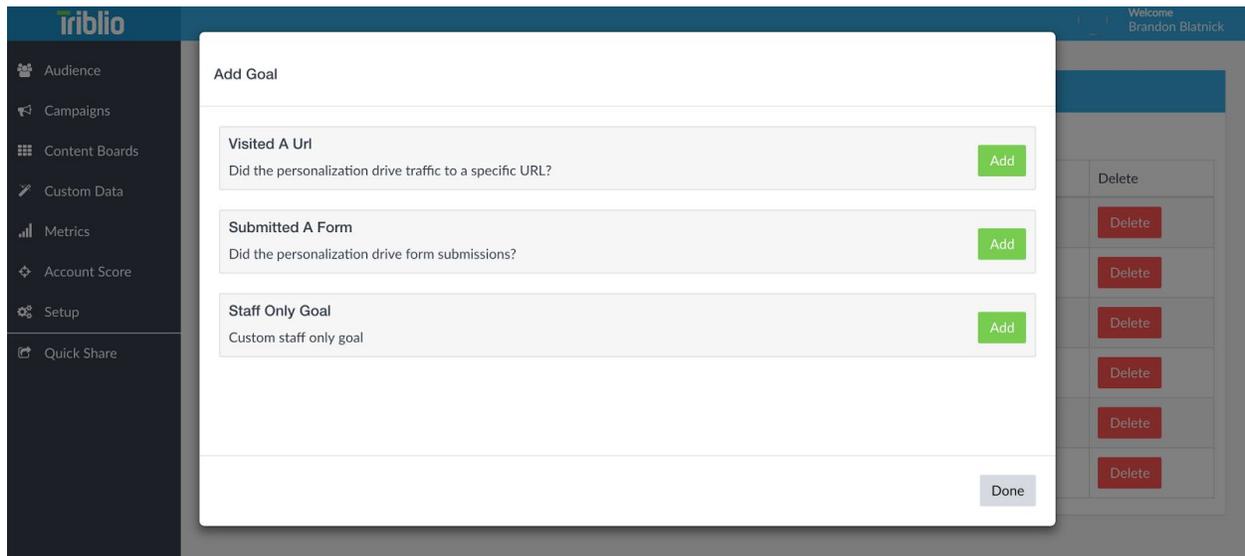
Create Additional User Accounts

In Triblio's app, your login credentials are located in the top right corner. You'll want to credential a few other team members too probably. Typical account holders include front-end developers, marketing and sales ops, and campaign managers.

To add a new user:

1. Click on Welcome so a dropdown appears and choose Admin. On the new page choose New User
2. In the modal, type in their First Name, Last Name, and Email. For the Twitter screen name, it is recommended to use the company Twitter.
3. Decide whether they should be an Administrator. Think: Should this person have the power to activate campaigns?

Step 4 Prep for Onboarding



Gather a list of company IPs

We will want to suppress your company's activity from campaign metrics. Talk to your IT team and get a list of all the external-facing IP ranges your company uses across its offices. Your CSM will ask for these after kickoff, and you can provide them in list, as Regular Expressions, or as CIDR blocks.

Determine how Triblio should track goals

Triblio is all about showing results from your top accounts, so it is critical that we set a good foundation for tracking goal completion in your campaigns. We can track these goals either by monitoring "success page" URLs (e.g. a confirmation page after someone requests a demo) or form submissions (monitoring the request demo submit button). Most customers use a mix of the two.

After kickoff, we will ask you what pages or forms we should track in order to measure the seven types below, and any others relevant to your business. Talk to your marketing ops team if you need help determining the best method, and of course your Triblio CSM can help too.

Please provide URL where the form lives or URL of the success page after form completion:

- Newsletter (or Blog) Subscription
- Content Download
- Event Registration
- Sales Inquiry (MQL)
- New Opportunity (SQL)
- Unsubscribe / Opt-Out

As an example, many customers will send all content downloads to a thank you page like this: `offers.company.com/thank-you-content-[name_of_content_item]`. In that case, we mark a goal completion for any account that touches a URL including `"/thank-you-content-"`. (Regular Expressions are fine.)

Give your CSM a head start, too!

If you can send any strategic documents or analytics info to your CSM, it will assist with the campaign strategy and design process. Here are some examples that help us help you:

- Grant web analytics access to `api+[your-company-name]@triblio.com`
- Send a sample of the quarterly reports your team uses to measure success
- Send an overview of your sales process from prospect to Closed-won, including what CRM stages you use
- Grant api@triblio.com admin access to your Google Analytics account. We use this to see what your top content is for views and exit pages to make more meaningful campaign recommendations, integrate with Triblio, and set up custom reports.

On-Boarding Checklist

- Login to the App
- Install Element Selector
- Setup first campaign
- Locate and place Message Element Script on Website and Landing Pages
- Locate and place Overlay Element Script on Website and Landing Pages
- Locate and place Google Analytics Script on Website and Landing Pages
- Create Audience Segments in Marketing Automation Platform
- Integrate Triblio with Marketing Automation Platform
- Create additional user accounts
- Send blacklist IPs to CSM
- Grant Admin access to Google Analytics
- Gather list of URLs for goal setting
- Compile business strategy documents