

Making Marketo a PLG Powerhouse

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Is Marketo a PLG Blocker?

Adobe Marketo Engage is still a Sales Led powerhouse platform in 2025, more than 15 years after it took the B2B world by storm. Marketo enabled Sales Led Demand Generation for a generation of B2B marketers and built the Marketing Operations function. With its large install base, reputation, and large community of experts, Marketo is still a go-to platform for many teams.

Yet, with the resurgence of [Product Led Growth](#) (PLG) and [Product Led Sales](#) (PLS) in the past five years, many in the GTM Operations community questioned Marketo's capabilities for the future of PLG support, such as high-volume user data, and real time event communications.

B2B SaaS companies are often asked by their Boards to shift from [PLG user-driven revenue](#) to Enterprise Sales Growth for "stability" and "large contract values (ACV)." The default reaction is to hire a lot of salespeople to run Sales Led Growth. The best companies, however, leverage their user data to prioritize a smaller set of Accounts with a smaller group of salespeople for maximum efficiency. To do this effectively requires a unification of PLG data with a platform like Marketo.

Marketo's limitations in data processing, insights, and real-time communications weighed on Marketing Operations teams pressured to deliver in freemium PLG motions. In response, a few companies took up the challenge for real-time data (Segment, Adobe, Snowflake), real-time omnichannel personalization (Adobe), and Product Led Growth motions (Inflection).

Using Marketo in a PLG or PLS motion does have challenges, especially for data processing speed and multi-channel communications.

So why use Marketo with PLG and Sales Led motions? The good news is, Marketo *absolutely can work with* PLG! With the right architecture around Marketo, it becomes an even more powerful platform with product data to drive enterprise sales growth.

Marketo is a Secret PLG Powerhouse

Marketo's capabilities are still very much relevant to PLG and PLS motions—if you know how to use them.

Marketing Operations professionals have long realized the power of adding product data to Marketo to support PLG in Enterprise Sales motions, among other use cases. The challenge is that most companies built their Product separately from their Acquisition martech and sales tech stacks. Thus, all that juicy Product event and user data lives entirely separate from the GTM engine that powers revenue.

And why do you need that Product data available for GTM communications?

To optimize the funnel even more than you can today! Your product team has a treasure trove of first-party data that could drive relevant, personal communications, feed an ML model for In-market Accounts, and predict upsell.

Most teams still aren't fully leveraging that data in Marketo, let alone in their GTM strategy.

There are two big challenges when attempting to unify the Strategy and the Data infrastructure to accelerate PLG and PLS.

1. Do you have a GTM Strategy for each cohort or segment?
2. Data infrastructure to run this at scale.

While the biggest impediment to success with PLG to Enterprise Sales is a well-designed aligned process between *teams*, Marketo struggled to support the datasets involved.

Larger User Datasets

Large volumes of user data fill up Marketo quickly, which results in the following:

- Marketo slows down
- Marketo fills up with poorly enriched data Sales can't use
- Cost per Record causes your Adobe bill to increase rapidly

User Event Datasets

User events, or the user actions in a Product can trigger journeys as well as inform models of likelihood to go to a paid sale. Marketo simply cannot ingest this volume of data and act on it effectively. Custom Object and Activity limits along with Bulk API limits and costs mean this data must be filtered before it reaches Marketo.

If any journey has a critical real-time component measured in milliseconds, Marketo likely won't be able to react quickly.

GTM Operations data engineers can work around this by

1. Throttling data streams
2. Pushing requirements away from real time
3. Setting up data warehouses
4. Throttling data into Marketo for Sales Ready or Enterprise
5. Enriching only business emails with certain criteria to reduce costs

Why Marketo Struggles with PLG

GTM Strategy Primer

The biggest challenge with any GTM Strategy is having a clear one, with clear motions appropriate to your audience. Most companies get stuck here because they skip this step and just buy tools or start sending campaigns, then wonder why their revenue numbers don't match projects.

The goal here to bridge the Product Engagement (events) with the Marketing Responses (logs) to create a single buyer's journey.

Steps to Success in GTM

1. Run a Workshop with all GTM teams and Product.
2. Map Out the 365 Day Lifecycle from Sign Up to Offboarding
3. Define functional Swimlanes by Team and System
4. GTM Ops should plan out the specifications
5. Build it

Let's look at the typical way PLG to Sales Led occurs.

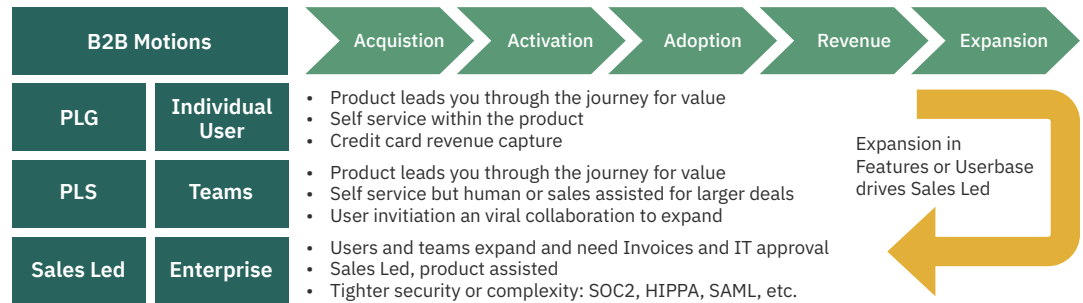


Figure 1. Typical B2B motions. PLG user needs increase, requiring PLS or Sales Led. GTM Strategies may also mix all three to drive Enterprise expansion. See <https://www.reforge.com/blog/product-led-growth> for other views.

For each major segment or motion plan out how you will treat the customer. Here's a sample that applies to most situations.

Strategic Motion	Implications	Key goals	Key Handoff Points	Typical Communications
Product Led Growth	Free user account sign-up Self Service, no humans	Sign Ups DAUs Usage thresholds to drive Paid	Free User to Paid User	Onboarding Use us More Churn Risks
Product Led Sales	Free Trials Multiple free users with high usage indicate sales opportunity	Free Trial conversion Multiple users from same domain	High usage Target Accounts to Sales	Onboarding Sales-assisted setup High Usage to Sales
Sales Led Growth (Enterprise)	Free Trials Out of Market to In Market Accounts Call Us for Enterprise Product robustness	Buying Team Users Free to Paid	Target Account driven to Humans High Usage, High user count to Sales	Onboarding Sales High Usage drive to salespeople

Communication Use Cases for Marketo

Many startups begin life in PLG as part of a [freemium](#) model whereas Product Led Sales or Enterprise sales may have a Free Trial limitation rather than an entirely Free User tier. The challenge is when investors push the CEO to increase revenue, which usually means hiring salespeople. Those salespeople don't have visibility into product usage, limiting their ability to focus on In Market, Sales Ready accounts.

That's where Marketo can help you deliver that data.

PLG and PLS motions have several use cases that require tight coordination between Product Managers, Marketers, and Marketing Operations just as tight as the systems involved. Here are a few of the many use cases Marketo can enable with the right data and journey design. Here are a few of the many use cases Marketo can enable with the right data and journey design.

Use Case	Goal
Acquisition of Users or Names	Signups Net New Names
Welcome and Onboarding Emails and Messages	Confirm real user Drive usage DAUs
Upselling Users	Upsell users to paid tier
New Feature Launches	Increase usage of specific features
In-app Messaging	Increase usage and retention
Texting/SMS	Sales meetings Reminders to use
Advertising – Audience Matching	Surround buying teams for acquisition
Advertising – Audience/Lead Gen	Surround buying teams for acquisition
Pushing High Propensity Enterprise Users to human Sales	Increase revenue
Pushing High usage users to Self Service upgrades	Increase revenue
Renewal programs – self-service and CSM driven	Increase revenue, NRR
Winback programs – at-risk account? Know and act now.	Reduce Churn Retain Revenue, NRR
Buying Team Communications & Surround Sound Programs	Target Account Acquisition Sales support for large deals

Of course, to drive (trigger) any of these programs requires the right data, at the right time.

In the past, MOPS teams relied on creaky data jobs from Product to SFDC or MySQL databases with limited visibility into timing or what that data meant.

Now MOPS and Product data teams must work together to build the best, high-speed system to compete effectively. The good news is, Marketo is ready to work for you with some careful data architecture.

Is Real Time Important or Useful to the Business or Customer?

During PLG discussions, personalization and real-time actions tend to become a requirement. Yet, most product and marketing teams aren't prepared to design such journeys. For B2B journeys, real-time changes rarely impact the buying decision outside of responding to [Inbound Requests](#).

To ensure the right framing and impact of real-time communications (and thus data), ask these questions of the stakeholders:

1. Do you need real-time or near real time?
2. How do you define "real time"?
3. What would you do with "real-time" data?
4. Which channels do you want to communicate in?
5. Are you prepared to design that omnichannel experience?

For B2B products and sales processes, real-time actions are rarely a game changer. It's technically possible; however, it is recommended to nail down your GTM process first, then look at how to increase the cadence of data.

Just because we can doesn't mean we should. And this is on two levels:

1. Does it help the customer solve their need or act?
2. Does it solve some business issue?
3. Does real time have an ROI?

Real Time Use Cases

When does "real-time" communication or personalization matter? When does it have a true impact on the customer and thus revenue outcomes?

For most B2B enterprise firms, the use cases are limited and may not be worth the effort. For more high-volume freemium users or in product scenarios, real time may matter very much on first impressions. For an ecommerce firm of any type, real time can mean the difference between a sale or nothing.

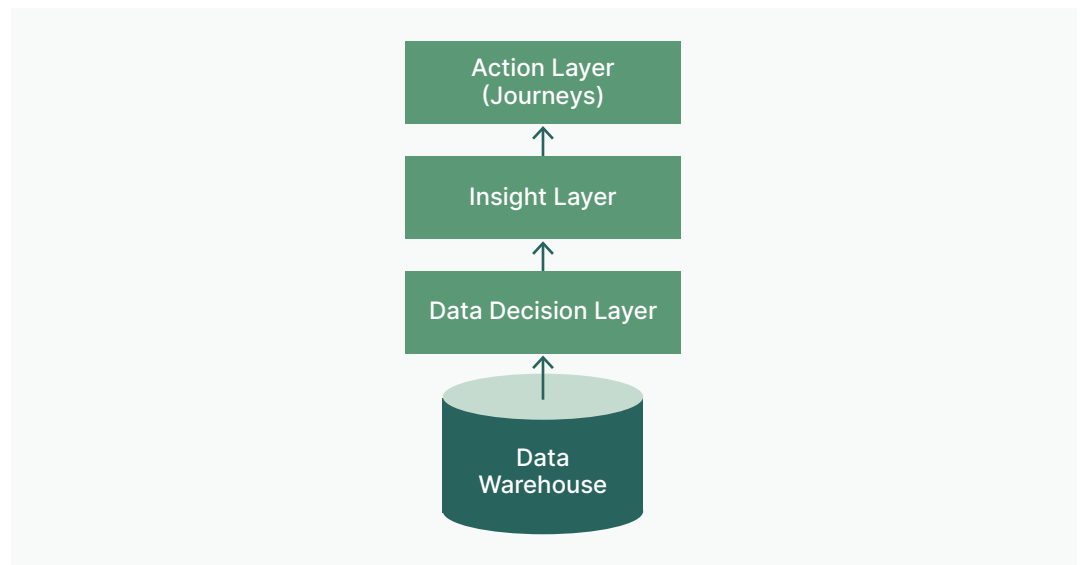
Real Time Scenarios and Considerations

Use Case	Real Time Needed?	Location	Thoughts
Premium Feature Paywall	Yes	In product	In product should be immediate. Perhaps ignoring the paywall results in new journey with email or ads that is not real time.
Enterprise SaaS: Website Personalization by Industry, Function for non-users	Maybe	Website	Non-logged-in users can be targeted by cookies, ID, IP, etc. Can you measure the impact on conversions?
Ecommerce Website	Yes	Website	Showing recommendations, in Stock, etc.
Abandoned Cart	Maybe	Website, Email, in App	Near-real-time reminders can create real lift in any segment.
Website Visit Follow-ups	Maybe	Website Email Phone	When should this happen? Key page visit results in Sales email or call >> is that the best experience for everyone?
Product Signup Failure	Yes	Email SMS	Lack of verification or other requirement may need real-time actions with later follow-ups
Product Signup with Low Usage	Maybe	Email SMS In App	React to defined low usage or churn risk in best channel. May not need a "real time" action vs batch.

A PLG and PLS First Architecture

Each GTM stack will be somewhat unique depending on the company's strategy and GTM marketing approaches. There are common considerations when including Product event data and the potential for real time communications.

Think of the architecture as a set of layers. Each layer has an important function and then you can add tools to act in those layers. Your stack likely has some or most of these layers across the business, but some of them may be siloed or not unified in a way that helps PLG and Marketo work together.



Layers of the New Stack	Purpose	Examples
Insights	Human focused visualizations for decision-making. Modeling	AI or ML Algorithms Tableau Looker Power BI
Action & Orchestration	Coordinated communications across Accounts, Users, and Channels. Enables 2 way communication and response data collection	Adobe Marketo Engage
Data Decision & Transfers	Leverage business rules and ML decisions to push audiences between Data Storage and Action Layers Integrate Data Storage CDP with Action and Functional Datasets	iPaaS and data orchestration platforms such as: Openprise Workato Adobe Sensei Hightouch Streamsets
Data Storage & Identity Matching (CDP)	Store large scale-data with ability for rapid insertion and extraction. Real-time data delivering from Product databases.	Snowflake Hightouch Adobe Experience Platform
Functional Datasets (or Siloed Data)	Localized datasets from Product, Sales, Website, etc	Varies Remember SSOT is a myth— better to set up the right data transfers you need to support PLG.
Product Layer	Where the user takes action and generates data exhaust.	Capture of user events, data, etc.

Product Layer

Your Product engineering team already has this layer. It is comprised of the Product and its workflows. The users in the Product generate user events such as logging in and pressing buttons that are then placed into a special Product Database with that entire history. These data relationships are crucial for managing a PLG motion so understanding the data map and what's truly important to converting a Signup to an Daily Active User is critical.

1. Product will log all events or actions
 - a. Who decides what comms happen and when? Should be lifecycle team plus PM
 - b. Which data is relevant?
 - c. Do we dump it all in DWH or only part of it?
 - i. Future proof or just a waste?
2. GTM Team decide without PMs?
 - a. GTM and PM should always be aligned, esp to support NPI, Feature Launches, etc.

Data Layer

Your data layer likely contains several databases across the business. Piping the critical PLG motion data that drives communications and decisions is the biggest win and often the biggest hurdle to overcome.

Data Unification for Great Customer Experiences

The unification of user and marketing and sales data in a Data Warehouse improves the ability of the Action Layer to communicate with the audience. For example, how many stories do we have about a New Customer receiving 90 emails within a week of signing a contract? That happens because the data and communication tools are not unified to ensure a unified Journey and a unified experience.

The unified communications logs such as Emails Sent or SMS sent can ensure that the Action Layer (Marketo) sends only the right message once. If the Product already sent the Welcome message, Marketo will see that and skip to the next part of the Journey. Thus, a suppression list becomes just as useful as a targeted audience list.

Data Siloes are your Friend

Many “Big Data” advocates thought a Single Source of Truth (SSOT) was attainable. I have yet to see that happen. Many years are wasted in pursuit of such goals.

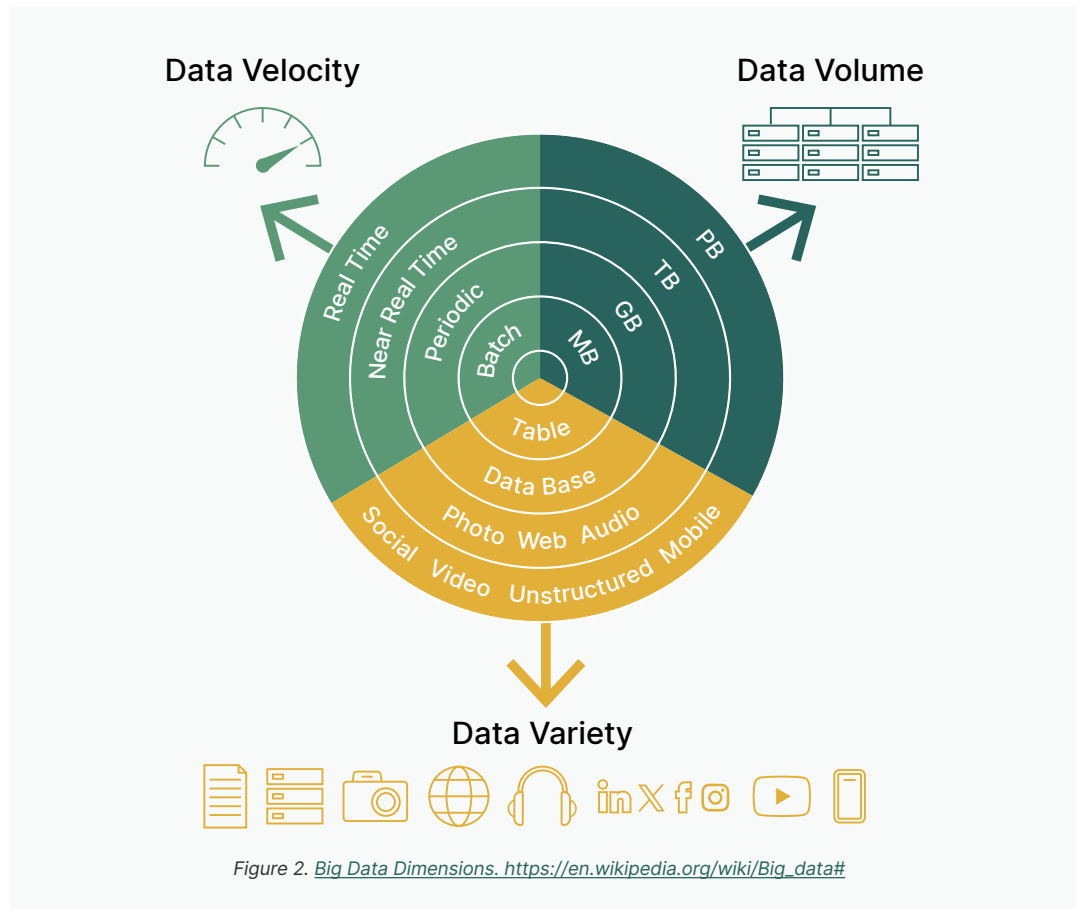
Instead, GTM operations teams can develop agile data skills to pull data from across the organization, orchestrating the “best set” for GTM teams to action and analyze.

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The data layer in a PLG motion should be designed to feed the *right data for GTM motions, and no more*. Create an SSOT from all the siloes you need thanks to ETL/Reverse ETL jobs and only take the data you really need, as frequently as the business experience demands.

Data orchestration efforts do need to balance the desire to have all the data in one place with the incremental as-needed approach. Product Data teams and data engineers may be reluctant to do a “data dump” into a data warehouse for cost, effort, and security reasons. Such attempts are fraught with pitfalls from bottlenecks to underused tables. At the same time, going back to the well every quarter can slow down GTM teams’ ability to communicate with audiences.

Do you need real time or just more frequent Batches? Borrowing from Big Data, GTM teams should look at Velocity, Volume, and Variety to consider the tradeoffs of managing data transfers against the demands of the business.



Beware the Batch Job, Beware Real Time False Choice

Most GTM Operations teams received data with little thought about how it might be used. A lot of critical data such as Last Login Time or Trial Start might be a part of a batch job. The batch job could run hourly but more often it was Daily or Weekly at 3am.

Why is that important?

If the requirement for a Welcome Email is to be sent within 15 minutes of Signup Time, and Marketo won't see that data until *the next day*, then Marketo can't help. The Product team will set up that email series inside the Product and likely condemn it to years of neglect away from Marketers.

Thus, Product and GTM Lifecycle teams need to collaborate to balance real-time communication requirements and team ownership to accomplish the best outcomes.

That doesn't mean real time is always necessary because sometimes it's expensive to achieve when a 15-minute or hourly job will achieve the goal.

Compliance and Privacy Management

Compliance is a critical part of GTM Operations, an area I call Privacy Operations. For those using Marketo, that database has de facto become the Source of Truth for Opt Out and Opt In values. Marketo as the central email platform for many teams has to have the correct Opt Out values lest the company fall out of compliance with laws like CANSPAM and GDPR. Most Marketo experts build in the fields and [Subscription Management](#) in a custom way for each business based on input from a Legal team.

The challenge becomes data focused when several teams from Product to Customer Service manage communications and preferences. When building out your Data Layer, identify these siloed Privacy approaches to create a unified Privacy Source of Truth that will sync across key systems, avoiding embarrassing missteps that could run afoul of regulators.

Here are the primary steps to take to ensure your Data Layer manages Consent and Compliance effectively.

1. Identify all teams that capture consent.

Multiple teams may be managing compliance data without realizing it. In this discussion, the focus is on Consent and Privacy; however, there may be other compliance considerations with Product usage or PII (Personal Identifying Information).

Teams to contact: Product, IT Data, Legal, Marketing, Sales, CRM, and Sales Operations.

¹ Many experts offer methods for building this critical part of Marketo. Also see [Adobe](#) and the [Marketo Nation](#) for ideas.

2. Create a Communications and Consent scenario and architecture

For every communications scenario, map out the teams involved, databases, and entry points.

An example consent table that suggests where each data value comes from and should go to. I usually recommend clients have a central Subscription Center to ensure a great customer experience and a single place to go to. The backend data flows can be architected so the experience is seamless from the customer point of view.

Communication Channels	Original Data Owner	Flags and Data to Capture	Where to Sync
In App	Product Data Team	IP Address Time of Consent or Removal True or False	Product Marketo Data Warehouse
Mobile Notifications	Product	IP Address Time of Consent or Removal True or False	Product Marketo Data Warehouse
SMS/Text	Product or Marketing	IP Address Time of Consent or Removal True or False	Product Marketo Data Warehouse CRM
Email	Marketing Product	IP Address Time of Consent or Removal True or False	Product Marketo Data Warehouse CRM
Phone Call	Sales Marketing	IP Address Time of Consent or Removal True or False	Marketo Data Warehouse CRM
Fax	Sales Marketing	IP Address Time of Consent or Removal True or False	Marketo Data Warehouse CRM
Mail	Marketing	IP Address Time of Consent or Removal True or False	Marketo Data Warehouse CRM

***This is not legal advice. Please consult appropriate Legal Counsel in your jurisdiction to determine the best method for your organization.*

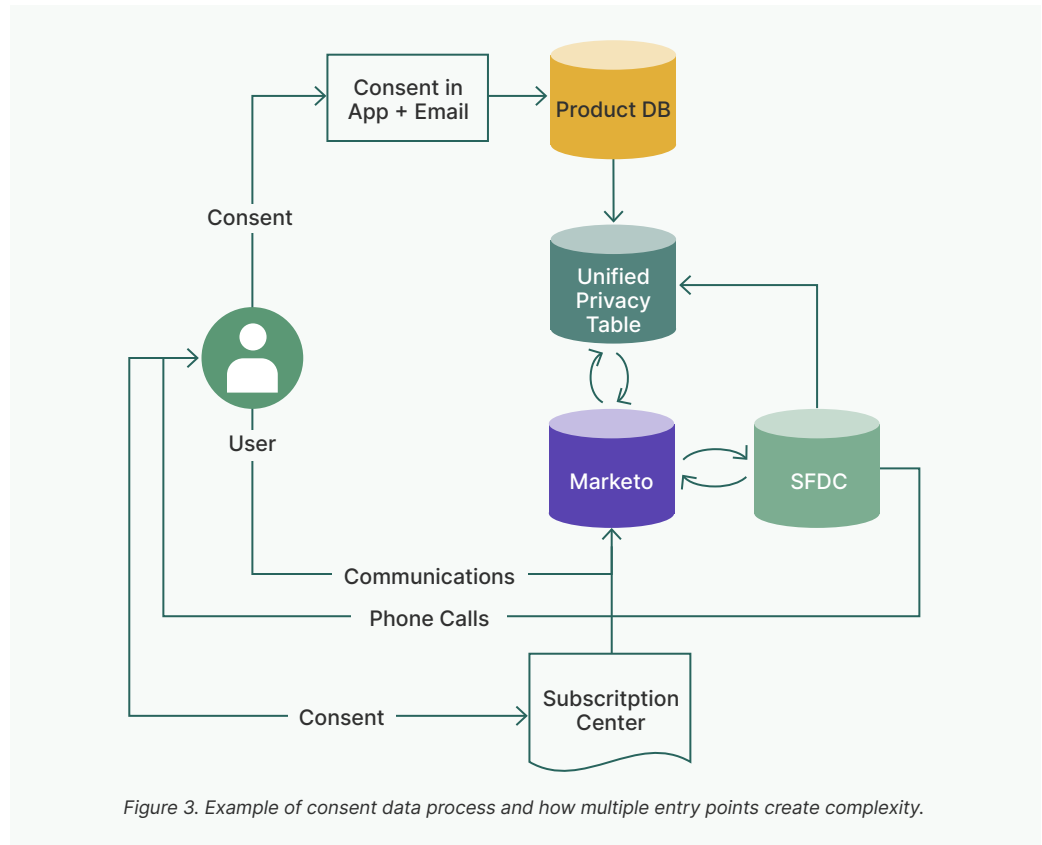


Figure 3. Example of consent data process and how multiple entry points create complexity.

3. Create a Privacy Governance Group with Legal as sponsor

Ask the Lawyers to provide requirements regarding compliance in all relevant jurisdictions. Run a systems analysis to provide feedback and details on how best to capture consent and manage syncing to meet the regulation and risk profile of the company.

Consider how data transfer timing capabilities map to regulatory requirements. Many laws have a time limit to when opt out must be fully honored. If your systems cannot adhere to that limit, then something will have to change. For example, some laws provide up to 10 business days for a company to fully opt out a person from email communications. At a minimum, your data syncs should meet that requirement, if not weekly, then daily. I always prefer a near-real-time or daily batch sync to ensure a great customer experience.

Decision and Intelligence Layer

There are two parts of this layer. One part is Data Processing and Normalization; the second part is Business Rules or ML Decisions. The goal of this layer is to:

1. Process data to be normalized across systems, enriched, etc so it is usable at the Insight and Action Layers
2. Make decisions to push audiences to an Action Layer

The design of this layer is to ensure there is a bridge between Marketing Engagement and Product Engagement to support a single Buyer's Journey in the Action Layer.

The Decision Layer must be managed by GTM Operations with information from the Product Team, Growth Team, and Marketing.

Building a Decision layer is likely easier than it sounds! Such a system can conjure images of data engineers in data centers. However, with today's low- or no-code data orchestration engines, the hardest part is coordinating requirements across teams. Such composable tools like Openprise make it easy to turn business requirements into easy-to-update workflows. This ensures that optimization and future changes are managed in shorter cycles.

Data Processing and Enrichment

The critical piece holding back many firms from accelerating PLG to Sales is not always Marketo. It's having a clear strategy for handling the different target segments each GTM motion serves and how to transition Users at large companies to a human Sales team.

User data is notoriously challenging because product teams design Signups for speed, not B2B salespeople. For example, GTM data orchestration platforms like Openprise or Syncari can take complex user data, match it against CRM and Third-party datasets to prepare it for routing to Salespeople. Of course, there are other options such as Segment or Databricks which require more engineering effort.

Thus, when Marketo receives a set of high usage users to turn into Leads for Sales, Marketo has all the demographic data *and* the usage background to send to Salesforce for a BDR to act on. All the BDR will see is a High Propensity Account with a large user set and the buying team's titles and phone numbers ready for action.

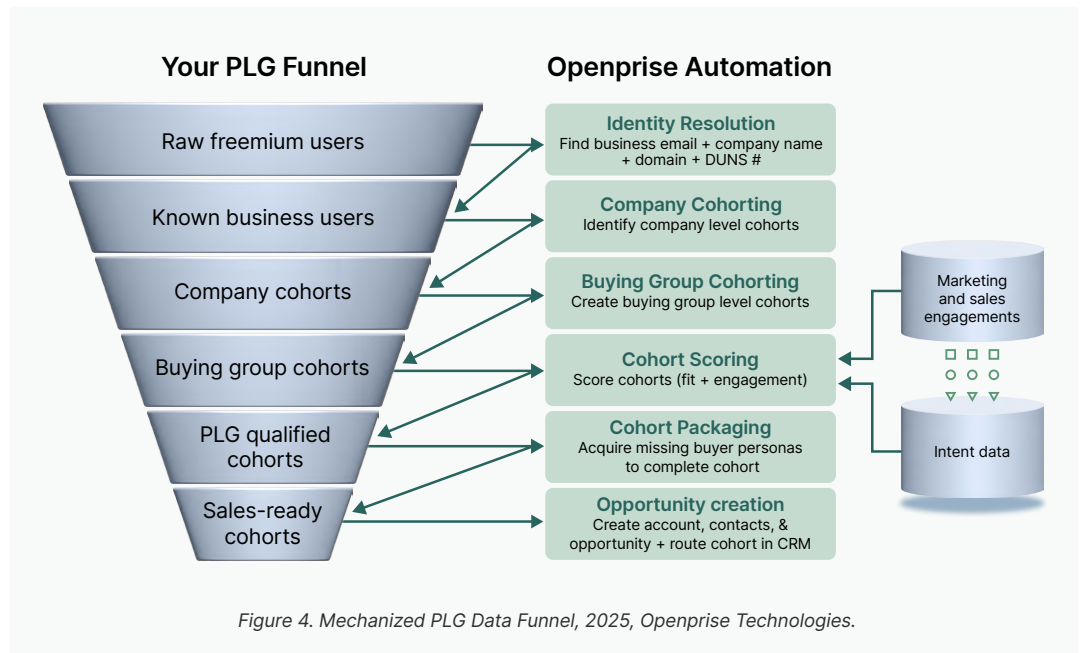
Tools areas you may have or need to consider² included in architecture to enable Marketo to work with PLG motions.

1. Reverse ETL
2. Data Enrichment
3. Omnichannel Journey Orchestration / Action Tools
4. CRM
5. In Product Communication
6. Data warehouses
7. Product Analytics

Data Orchestration and the PLG Waterfall to Unify PLG Data with Sales Data

A data orchestration approach is needed to achieve data unification in a way that enables scaled communications and unified journeys. One approach is the Mechanized PLG Data Funnel from Openprise. This approach enables Product user data to become useful Enterprise Sales data, pre-packaged and ready for Marketing Communications and Sales teams alike. Using this approach, the Data Layer becomes a powerful backend for Decision Intelligence and Marketo Actions.

² PLGTM Vendor Landscape 2025 – <https://www.plgtm.com/ultimate-plgtm-vendor-buying-guide>



The waterfall model Openprise proposes is helpful in understanding how to unify siloed data into GTM motions such as identifying Sales Ready Target Accounts from their heavy usage of a freemium or low-cost user base.

To enable Account Surround Sound programs, you can go further up funnel to Anonymous data identifiers associated to ICPs or Target Accounts (within legal limits of course). Then push that cohort data to your DMP/DSP Service.

For those companies moving from pure PLG to Enterprise Sales (or Sales Led Growth), enabling the right Company Cohorts and modeling a probability that a set of users moves to an Enterprise Opportunity is *the critical path to leveraging PLG data to drive Enterprise Sales*.

Decisions – Business Rules vs Machine Learning

I recommend most teams start with a set of business rules informed by real data. There are key gates (or decisions) that can optimize the funnel. A few examples are:

1. Likelihood to Become Paid User
2. Likelihood to Become Paid Enterprise Account
3. Likelihood to Upgrade
4. Likelihood to Churn

These gates will decide if a user (or set of users) should be pushed to Marketo (the Action layer) and then to Sales or a Self-Service option. The gates can also push audiences to Advertising platforms, nurtures, or channels like In App messages. The possibilities are endless, but great teams choose carefully what matters.

Once the team and system are running with Business Rules, then I recommend modeling these decisions with Machine Learning or Regression analysis to allow a larger set of data to inform the decision.

For example, many MOPS Marketo teams use basic lead scoring informed by only a few response points, such as Visits Web Page. Instead, point ML at the entire set of usage and response data to create clusters of users by Company Size, Usage, etc., and then automatically push predicted audiences to the right place. What may happen is you have fewer Accounts sent to a BDR and thus need fewer BDRs to accomplish the same level of revenue. And you will have more accurate communications to your audience.

Cohort Analysis and Operationalization

Many teams struggle with cohort analysis to understand their ICP better as well as to segment out higher converting leads and users. Marketo, or any MAP, isn't the place for this analysis because they don't have statistical tools. Marketo should be a recipient of that analysis in the form of field values, or tagging Accounts or Leads, which can then trigger communications or actions.

Here's how to architect cohort and segmentation from user data for PLG and PLS motions.

1. Move appropriate data and joins to your Data Warehouse
 - a. Usage data
 - b. Users from higher usage or higher propensity Accounts
 - c. Revenue data
 - d. Lead data
 - e. Marketing responses (attribution) not in the Product
2. Run ML Model or Regression Model to optimize for Pipe, Opportunities, or Revenue
 - a. Cluster Types of Accounts or Users
 - b. Time Cohorts may be useful if optimizing a Campaign, Feature, or Churn
 - c. Create an index or score from this analysis
 - d. Run regular updates to the model as you learn more
 - e. Analyze Out of Market, In Market-MQL, and In market Sales Ready Accounts based on this deep data pool
3. Stamp every Lead (User) and Account with those propensity values
 - a. Example
 - i. High Revenue Propensity=.90 to 1.0
 - ii. Medium=.70 to .89
 - iii. Low = Under .70
4. Push that Value to a field in Marketo called "Propensity to Revenue"
 - a. Modify communications and workflows against these values
5. Review
 - a. Review data to ensure that the Propensity Score is roughly in line with future results
 - b. Re-run the Propensity Model as you learn

Insight Layer

The Insight layer could be combined with the Decisions layer. Here, the business intelligence platform (BI) visualizes data into dashboards and helps people understand the state of the funnel to optimize spend, revenue, etc. The Insights can be made more automatic to drive data transfers to the Action Layer.

Action Layer (Journeys)

Operationalizing the Buyer's Journey is the critical piece of what GTM Operations does at the end of the day. All of the other layers feed into the communication decisions managed by the Action Layer.

The ideal Action layer can communicate across channels in real time based on real-time data. The question is – do you need a journey to react in real time? Real time may have a lower ROI than expected in certain B2B situations.

What you need to do is to unify your journeys in one system so the design and operation are in a single location that is reportable in the same way. The cost of not doing so is tremendous and you likely don't realize it today—from opportunity costs to poor customer experiences to compliance risk.

Marketo's ability to be the Action layer for PLG and PLS journeys is much greater than most people realize. Before recommending adding an Omnichannel platform or ditching Marketo, consider that Marketo is the premier business workflow engine—and you already have parts of your journey live in it today!

Today, most readers have many Journeys created inside Marketo—from PreMQL Nurtures to Post Webinar follow ups. Many Journeys, however, are heavily fragmented with parts of User Onboarding in a product, Sales Led journeys living in Sales Automation tools, and Nurtures living in Marketo. That fragmentation results in poorer outcomes for you and your customers as well as fragmented reporting that is focused on email vanity metrics (Opens, Clicks, Form Fills) instead of outcomes such as Revenue lift.

All you need is the right framework and the right data. Your Data Layer will help Marketo better manage a unified Journey and enable you to report on it in an effective way.

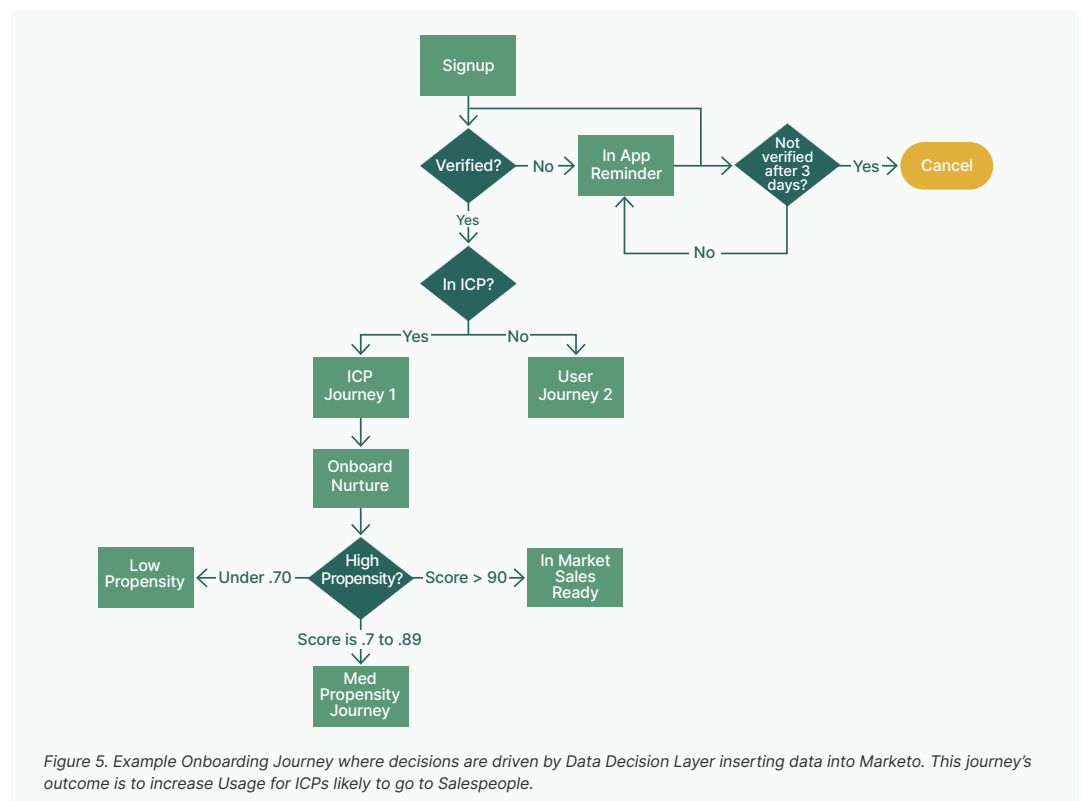


Figure 5. Example Onboarding Journey where decisions are driven by Data Decision Layer inserting data into Marketo. This journey's outcome is to increase Usage for ICPs likely to go to Salespeople.

This is where Marketo truly shines as your PLG Action Layer. Based on the behavior data, cohort data, and usage data, Marketo can place a Person and Account into a complete omnichannel journey. For example, a unified Onboarding journey focused on increasing DAUs and reducing 90-day Churn will leverage user data from Product to initiate the Journey in Marketo. Marketo will then send email, trigger SMS, trigger In App messages based on data it is receiving from the Decision Layer. Response data in Marketo is then pushed into the Data Layer to further optimize Decisions to reach the best Outcome most often.

The New Journey Framework for Marketo

I developed the [Journey Doc framework](#)³ to enable teams to rapidly develop nurtures in Marketo (and anywhere else). An updated approach is needed for a true Action Layer that leverages Real Time Omnichannel journeys focused on Outcomes rather than number of emails sent.

Questions	Explanation	Example
Outcome Goal	A business or customer goal	Decrease 90 day churn 20%
Hypothesis	People in this journey more likely to do X	People in this journey will churn 20% less than People in previous Journey
Entry - Who	Machine learning or determined audience	Signups of Target Accounts not yet in Paid Users more likely to pay than others based on ML/regression score
When	Timing: immediately or daily at 1pm	Within 2 hours of Signup
Cadence	ML-based best action or pre-determined	Email Content=X In App on Conditions If Usage below X, then do something
Bad Exits	Person does something we don't want, they should be in a different journey	Cancels Account Becomes Paid User In Market Sales Ready Account > go to accelerator
Content or Journey	Content of the journey	Feature Hints Outcome focus of use of product etc

In this approach, the focus is on the Outcome. The Journey Outcome doc is flexible enough to leverage [AIDA](#)⁴ or the [Bowtie](#)⁵ or the [In Market](#)⁶ approaches as part of the design of the entire Customer Lifecycle.

³ *Journey Doc in the Master Engagement Marketing Presentation, April 2018.* <https://www.slideshare.net/slideshow/master-nurturing-and-marketo-engagement-programs-96860221/96860221>

⁴ *AIDA – Attention, Interest, Decision, Action* [https://en.wikipedia.org/wiki/AIDA_\(marketing\)](https://en.wikipedia.org/wiki/AIDA_(marketing)) or https://en.wikipedia.org/wiki/Buyer_decision_process

⁵ *The Bowtie Funnel* <https://winningbydesign.com/wp-content/uploads/2024/05/The-Bowtie-A-Proposed-Standard.pdf>

⁶ *The Buying Team is Missing in ABM Strategy.* Josh Hill, August 2024. <https://www.informatechtarget.com/white-paper-ebook/the-buying-team-is-missing-in-your-abm-strategy/>

The Marketo Centered PLG Architecture

Many organizations treat Marketo as a CDP and Action orchestrator. While that did work in the 2010s for smaller database sizes, quite a few PLG businesses reached a limit with Marketo's data capabilities. With a PLG first architecture, Marketo becomes the *orchestrator* of communications and Sales actions, instead of a data bottleneck.

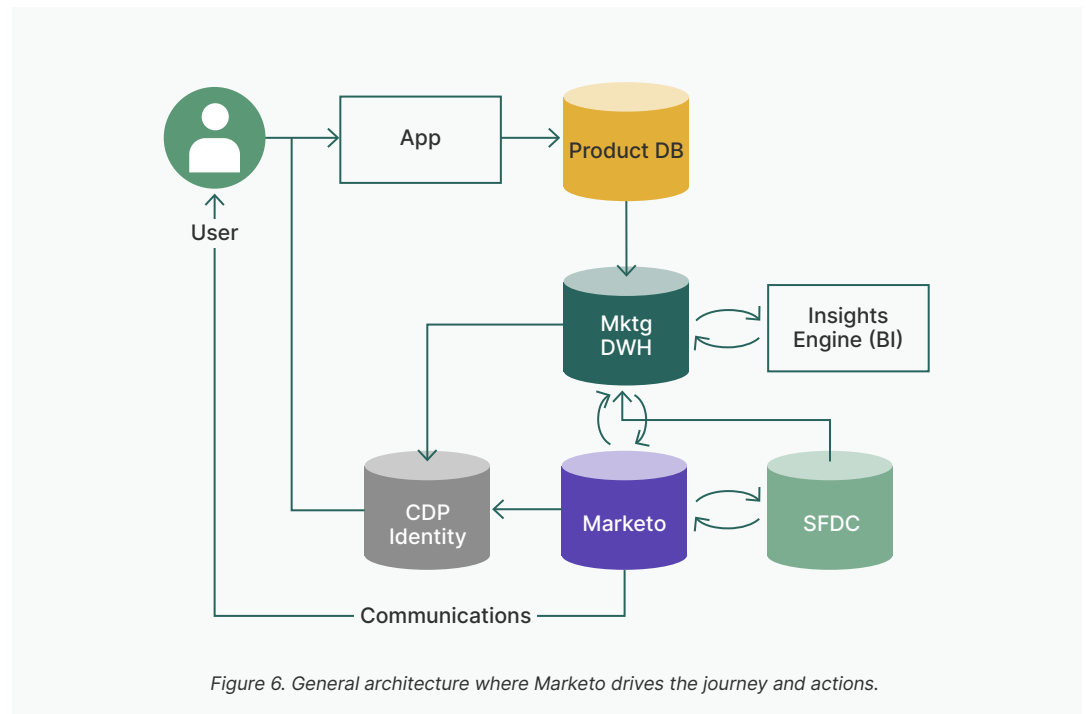


Figure 6. General architecture where Marketo drives the journey and actions.

Within the data warehouse and Marketo, you can leverage Custom Object relationships across siloes to feed into Marketo. Here is an example with User Event data as a custom object related to a Lead (User) and Response Data (Attribution data). Your ETL/Reverse ETL can process these relationships and insert them into Marketo with the Bulk API or real-time API, depending on the need.

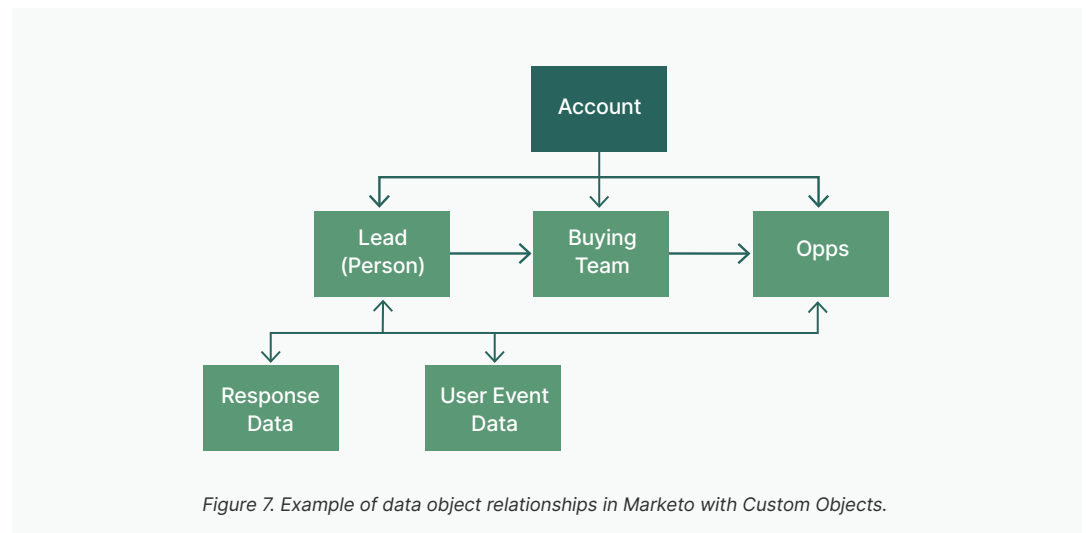


Figure 7. Example of data object relationships in Marketo with Custom Objects.

A Complete PLG and PLS Marketo Ecosystem

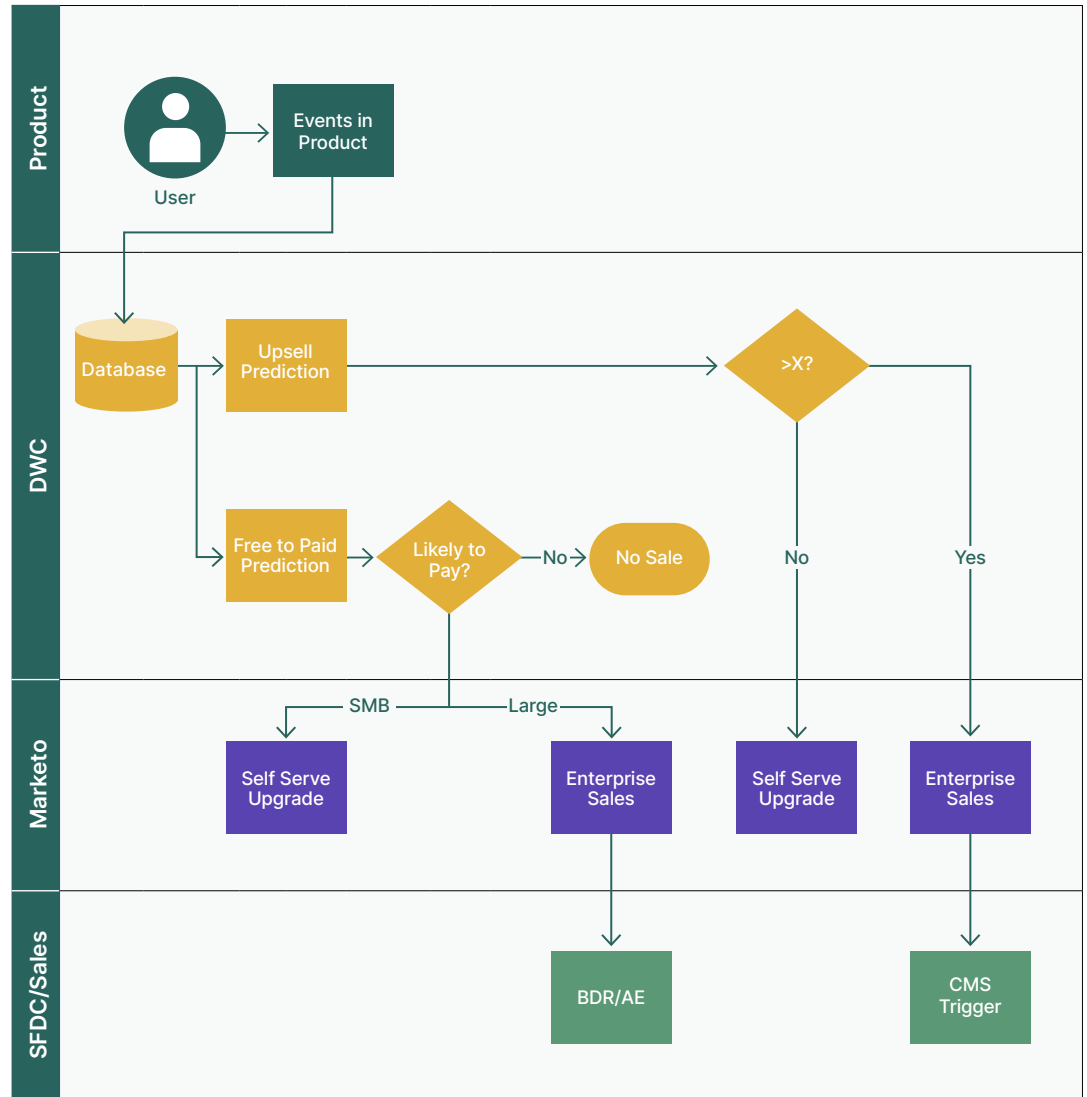


Figure 8. An example ecosystem incorporating decisions, datasets, products, and action communications.

Building the PLG Engine with Marketo

Marketo, at its core, is a workflow engine. It just so happens to have flow steps mostly related to marketing use cases or actions. PLG product managers tend to recreate parts of this engine in the Product instead of outsourcing it to Marketo.

Product lifecycle and user lifecycle data can drive related communications using Marketo at scale. And you don't need to spend Product engineering cycles on reinventing the wheel in your Product.

For example, Marketo excels at:

- Lifecycle Engine and Stage management
- Workflow Management – handoffs between systems and teams
- API integrations for data and communications
- Webhooks
- CRM Sync to manage sales workflow
- Custom Objects for unique data
- Custom Activity Log for all sorts of data

Here's an [example](#) of using Marketo's native integrations for omnichannel orchestration.

In the past two years, Marketo has released features that make PLG with Marketo more compelling, resolving data bottlenecks as well as order of operations challenges. These four upgrades enable PLG on Marketo:

- [Self Service Flow Steps](#) – build your own actions based on anything!
- Email sending velocity has increased in scale.
- [Executable Campaigns](#) better manage order of operations for Lifecycle Management among others.
- [AEP Data Streams](#) for audience creation and flows.

Tradeoffs when Using Marketo with PLG Motions

As with any platform, there are limitations with Marketo, tradeoffs that are inherent in product choice and technical limits. Marketo's recent upgrades do have limitations that can be managed with the right architecture.

The good news is Marketo is quite extensible for nearly every situation with its powerful API and inherent workflow management. And with careful systems analysis, most "limits" are not blockers to success.

Ultimately, the requirements of the business in the next 1-3 years should drive decisions on how to use Marketo for your PLG motions. Ask good questions of all stakeholders so you can match needs against Marketo's capabilities.

Tradeoffs when
Using Marketo with
PLG Motions

Requirements	Clarification Questions	Which System?
Immediately send notification after Signup	Is that needed? What is the notice for? Which Channel?	Product Marketo
Manage X million users	Do we already have large records or just preparing? Cost of storage in each system	Data Warehouse Product
Personalization	Is this just Hi First Name or more nuanced? Is it needed?	Email Website Marketo
Real-time Website Personalization	What would change on the site? By Industry? Other attribution?	CMS Marketo
Real-time action in Product	Will real-time action improve the experience? Will it drive revenue?	Product Marketo
Data updates on X million records	Where should this change occur and does it impact sales or comms process?	Marketo Data Layer Decision Layer DWH
Usage-driven content or campaigns	Map it out in detail How frequent? Will speed matter?	Product Marketo

Marketo Limitations and Considerations

Capability	Why it matters	Best practice	To consider	Operational limits
REST API	The powerhouse to tie Marketo to databases and other communication tools	Use it for everything	Data volumes Real-time limits for high-speed, high-vol needs	1MB per request Requests/second=5,000 Objects/day=10M
Munchkin API	Track and leverage real-time web or product activity and trigger actions	Tie attribution and actions from Anonymous Users to Known User, especially for custom CMS	When to customize Can you use this data elsewhere like a Visit Stack?	May need custom scripts for unique situations
Bulk Extract	Export activity and people data to data warehouse or CDP for joining to existing user data and analysis	1/day or 1/week to capturing rolling updates in 31-day span	Quota size may mean diff job creation and rolling exports	Concurrent Jobs=2 Max Queue=10 jobs Default Size=500MB (can pay for more) Max Time Span=31 days
Webhooks	Embed an action external to Marketo within a workflow and receive data back in API	Lead enrichment, field math	Speed and package limits mean this isn't ideal for PLG	Must be triggered Serial – one at a time Marketo Trigger queue and third-party response times Hard to debug
CRM Sync/SFDC Native Sync	Push critical triggers and data to Salespeople when model determines it	Push key data to SFDC	Does sales need ALL the data? Probably not	10k/hr record throughput Buying teams needs custom builds
SFDC Custom Objects	Add SFDC Object	Near-real-time Data dependent on CRM	Usually not real time	CRM sync throughput may cause disconnects in driving programs
Custom Objects	Bring user data and relationships as needed to Marketo	Non-real-time user data, product SKU lists, etc	Usually not real time	REST API limits 100MB per Import max 10 Custom Objects per Instance 10M records max 49 fields per object
Custom Activity Log	Create a log entry for a Lead with unique information and enable real-time triggers	External comm tool like Web Chat adds key chat data then trigger follow-up	May not always be real time enough, custom object may be better	API limits, third-party integration limits
Basic CDP/DWH	Stores a lot of records by email address	Marketo should have active or recent data	Deleting inactive records Injecting new or active data based on business rules	Cost of Storage Data processing slows as Marketo database grows
Email Send Volume				Emails/second Time Zone Sending Bulk Sending presets

*Exact limits will depend on your [Adobe Marketo license](#).

Conclusion: Marketo is PLG-ready if you plan for it

The bottom line: Marketo has been PLG-ready since almost the start. It's all about how you use it. Marketo has only gotten better at enabling the demands of a PLG user-focused motion in the past five years. When coupled with existing Product Led Sales and Enterprise Sales motions, you have a massive revenue machine at your fingertips.

Vendors to Explore

These are not endorsements of any type.

Layer	Commonly Used Vendors
Product Layer	Mixpanel Segment
Data Layer	Snowflake Databricks Adobe Experience Platform (RTCDP) Hightouch
Decision Layer	Openprise Databricks Adobe Sensei Syncari Hightouch
Insight Layer	PowerBI Looker Tableau Hockeystack Python Statistics Calibermind
Action & Journeys	Marketo Inflection Adobe Journey Optimizer (AJO)

Further Reading

PLG Onboarding, 2025, Ramli John, Wes Bush <https://productled.com/book/onboarding>
<https://openviewpartners.com/2023-product-benchmarks/>
<https://www.vendr.com/blog/q2-saas-trends-report>
<https://www.reforge.com/blog/product-led-growth>

About

Josh Hill

[Josh Hill](#) is a B2B GTM Operations executive with a 25-year track record of building world class platforms, teams, and products to accelerate revenue in high growth tech firms as well as transforming Product Led Growth into Enterprise Sales Growth. Josh has led global teams running operations supporting billions in revenue across marketing operations, sales operations, and customer operations. He is former VP of Marketing Operations at RingCentral and currently VP of Client Services at Etumos, a GTM operations consultancy.

Etumos

[Etumos](#) is a premier GTM operations and technology agency helping organizations scale operational excellence across the customer lifecycle. Experts from Etumos build and run accelerated funnel platforms, GTM architecture, analytics, and campaign operations.