Legal and Confidentiality Information

Introduction to the Marketo Certification Exam Prep

- Welcome to the Marketo Certified Expert (MCE) Preparation course. This is an instructor-led course that will help prepare you for the Marketo Certification exam.
- This advanced course is intended for those experienced Marketo users who are looking to prepare and take the Marketo Certified Expert exam.
- Introductory topics will not be covered during this course.

Marketo Certified Expert (MCE)

The purpose of the Marketo Certified Expert certification exam is to validate the knowledge, skills and ability needed to be considered proficient in the use of the Marketo “core” product.

Prerequisites

This course is intended as a review for marketing operation professionals, marketing automation professionals, and marketing practitioners.

This course alone without experience may not be sufficient to pass the MCE exam.

Prerequisites

- 1-2 years general marketing experience
- Foundational marketing automation knowledge
- 1+ years (800 – 1000+ hours) hands-on experience using Marketo Lead Management (marketing activities, database, design studio and analytics)
- Conceptual knowledge and business context of using marketing automation

Once Certified, You'll Enjoy:

- Official designation and logo that can be used on business cards and social profiles
- Membership in an exclusive certification group
- Recognition within the Marketo online community
- Official certificate (delivered electronically)

Exam Topic Areas

The Marketo Certified Expert exam measures the candidate's knowledge and skills related to the content areas listed below. A candidate should have hands-on experience as a Marketo practitioner and have the ability to preform the tasks listed as exam objectives within each content area.

Exam Objectives	Exam Breakdown
Program Fundamentals	30%
Targeting and Personalization	16%
Analytics and Reporting	16%
Lead Management	20%
Implementation and Operations	18%
Total	100%

MCE Exam Format

- Approximately 75-80 multiple choice items
- 90 minutes allotted to complete the exam
- Regular registration fee of US$225.00
- Overall passing score: 70%
- Before taking the exam, candidates must read and accept an Honor Code and a legal agreement, which includes an agreement that the candidate will not share or expose the content of the exam
- Candidates are not allowed any assistance from another individual, or printed or electronic media while taking the exam. Marketo takes the security of the exam content very seriously

What We'll Cover

This course reviews industry best practices and key elements of marketing automation, lead management, segmentation, implementation and operations, analytics, and marketing automation tools to serve as preparation for the Marketo Certified Expert Exam.

Course Lessons:

- Lesson 1: Marketo Program Fundamentals
- Lesson 2: Targeting and Personalization
- Lesson 3: Analytics and Reporting
- Lesson 4: Lead Management and Scoring
- Lesson 5: Implementation and Operations

What We'll Review

Marketo program fundamentals

- Best use case for programs type and channel selection
- Proper setup for success in programs and channels
- Engagement program details
- Email send program and A/B testing
- Event management
- Smart campaigns and flow steps

Understanding Programs

A program represents a single marketing initiative.

There are four types of programs:

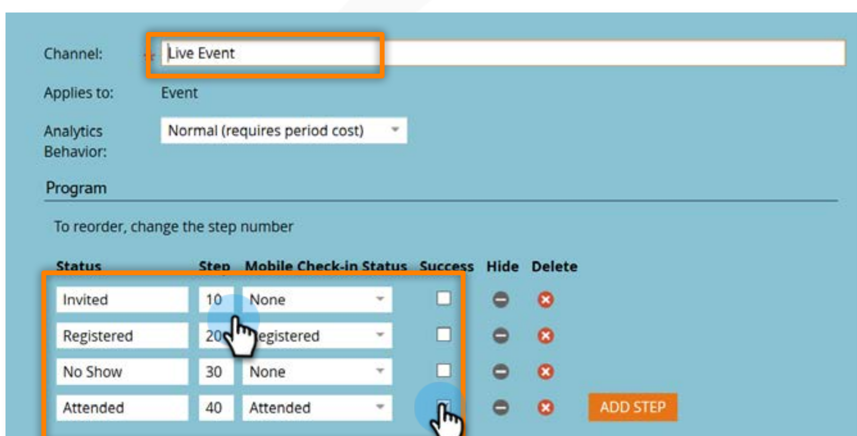
- Event programs
- Engagement programs
- Email programs
- Default programs

Program Membership

1. A lead fills out a form on a landing page in the program.
2. You import members into the program from a CSV file.
3. You use the change program status flow action.
4. A lead registers or attends a webinar synced with an event program.
5. A lead is created using the Marketo iPad check-in application.
6. A lead is added to a SFDC campaign that is synched to the program.
7. A list is imported to a group list in the database and under advanced Acquisition Program is selected.

Program Status and Success

- Program statuses are the steps people go through in a program (for example, Invited, Registered, Attended, No Show), these steps are defined by the Channel
- Success is defined as when a member reaches your goal for them within the program



Program Fundamentals: Program and Channel Use Case

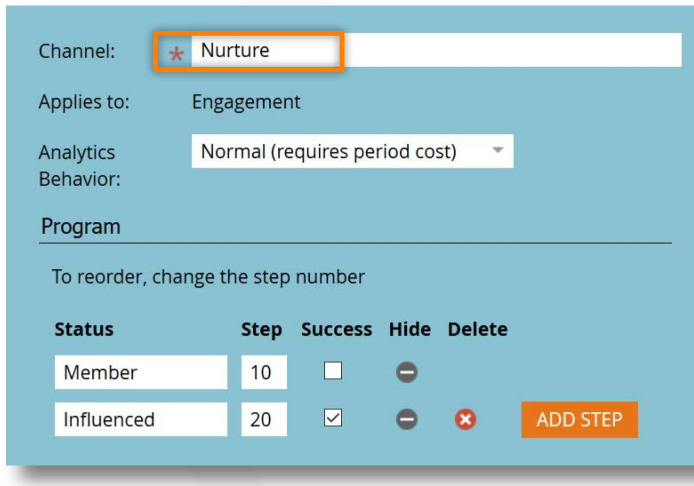
Scenario 1: You want to track a gated piece of content on your company website for number of form fills and new names.

Program Fundamentals: Program and Channel Use Case

Scenario 2: You want to send an email to individuals thanking them for stopping by and asking them if they would like to receive emails from you.

Program Fundamentals: Program and Channel Use Case

Scenario 3: You want to send multiple emails to the same audience at a consistent pace and time.



Choosing a Program Type for Nurture Initiatives

When deciding which program type to use for your nurture initiatives, ask yourself these questions:

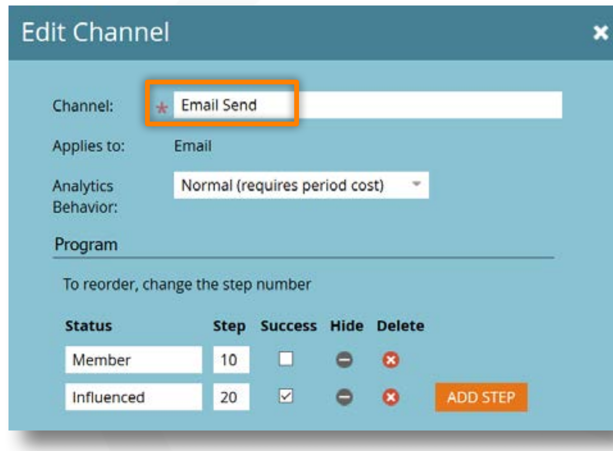
- Are the emails being sent out on a regular cadence?
- Can the audience be split up into clearly defined groups who receive marketing messages based on a standardized set of rules?
- If individuals can change cadence or emails partway through the journey, does this happen based on an action?

*If the answer to all questions is **yes**, you can use the **engagement program**.*

*If the answer to any of these is **no**, you should use the **default program**.*

Program Fundamentals: Program and Channel Use Case

Scenario 4: You want to send a product update or new release message to your customers.



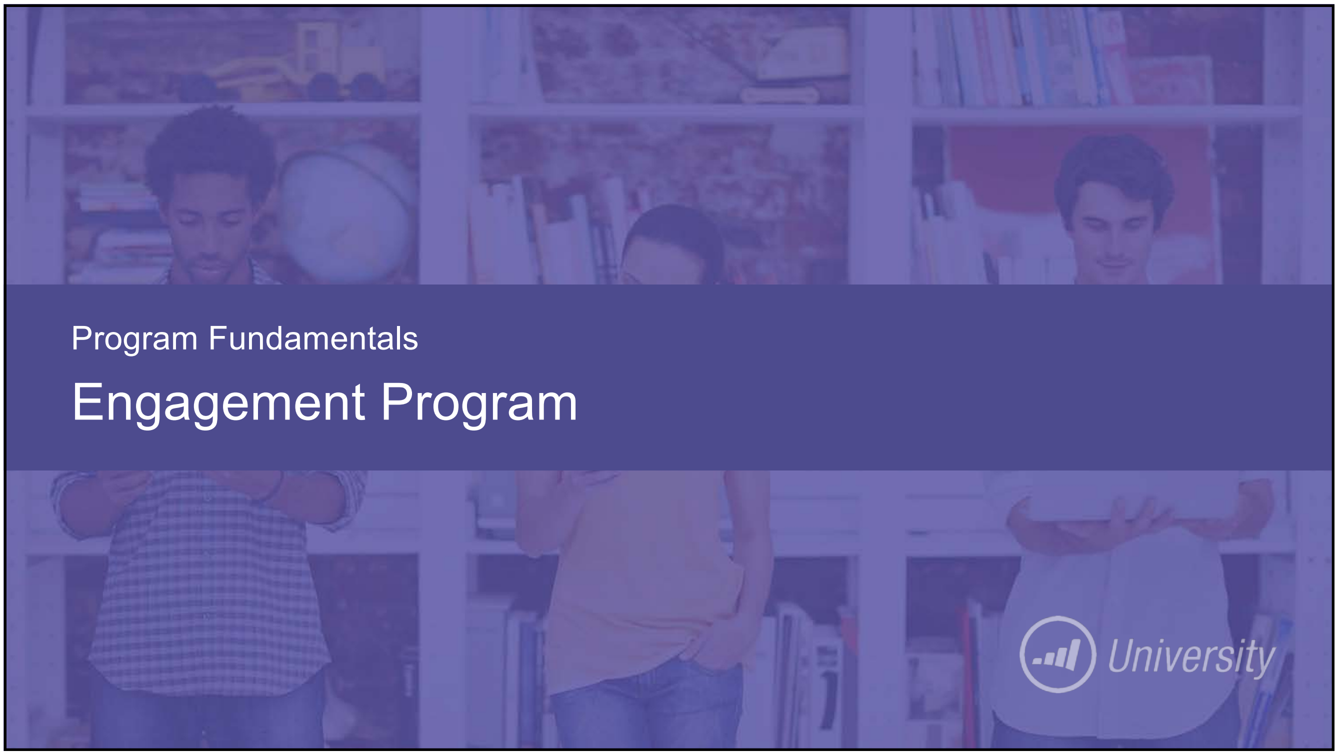
Choosing a Program Type for Email Initiatives

When deciding which program type to use for your email initiatives, ask yourself these questions:

- Is the email being sent out at a specific date and time?
- Is the email being sent out only once?
- Is the email being sent out to a group based on static or smart list criteria?
- Do you have no need to take any other Marketo action when the email is sent?

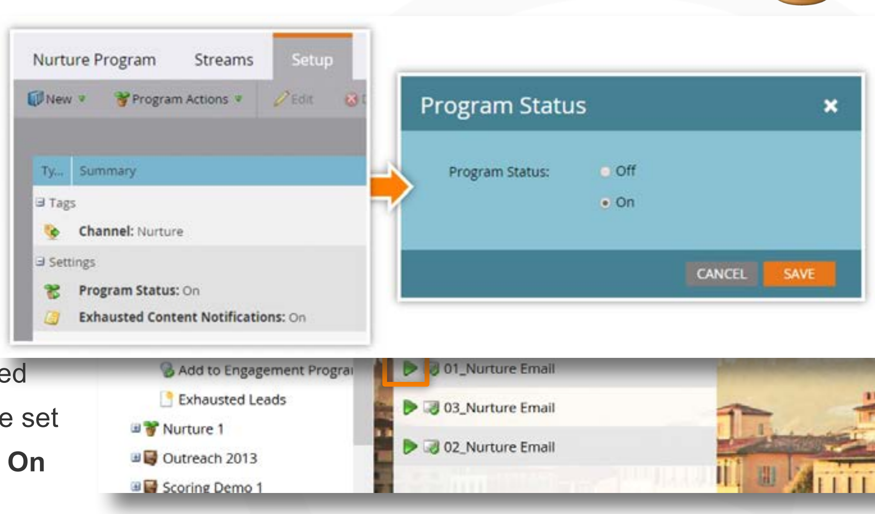
*If the answer to all questions is **yes**, you can use the **email program.***

*If the answer to any of these is **no**, you should use the **default program.***



The Engagement Program: Behind the Scenes

- Terminology:
  - Stream
  - Cast
  - Stream cadence
  - Exhausted
- Content type:
  - Email
  - Program
- Prior to launching:
  - Content must be activated
  - Stream cadence must be set
  - Program status must be **On**



Engagement Program: Exhausted Leads

When a lead has received every piece of content in a stream, they have exhausted all possibilities and will wait idle in the stream until more content is added.

When more content gets added, the lead will pick up right where they left off.

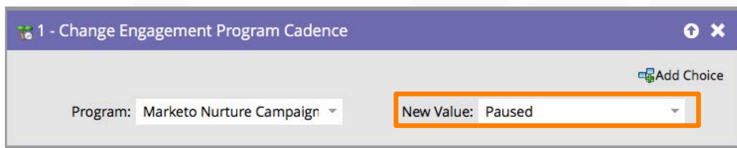
Engagement Program: Add, Pause, Remove Leads

- One of the benefits of an engagement program is being able to add, pause, and remove leads from the program.
- Leads can be added as they are created or when they qualify for the program.
- To add leads to a program, we recommend configuring trigger campaigns that listen for qualifying behaviors, and then utilize the Add to Engagement Program special flow step.

Engagement Program: Add, Pause, Remove Leads

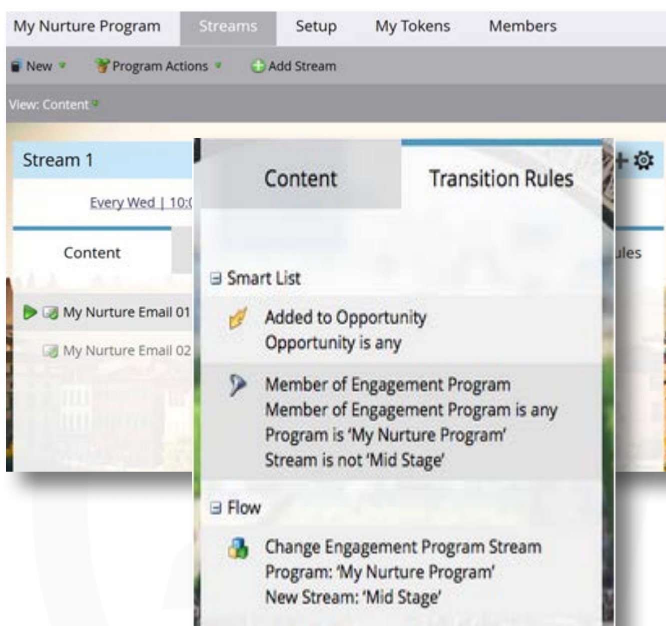
Leads can be:

- Paused if they become marketing suspended, unsubscribed, or move to another nurture
  - To pause leads, a similar trigger campaign can be used that listens for behavior, then uses the Change Engagement Program Cadence flow step
- Removed for the same reasons but, this typically isn't recommended because it will interfere with performance metrics



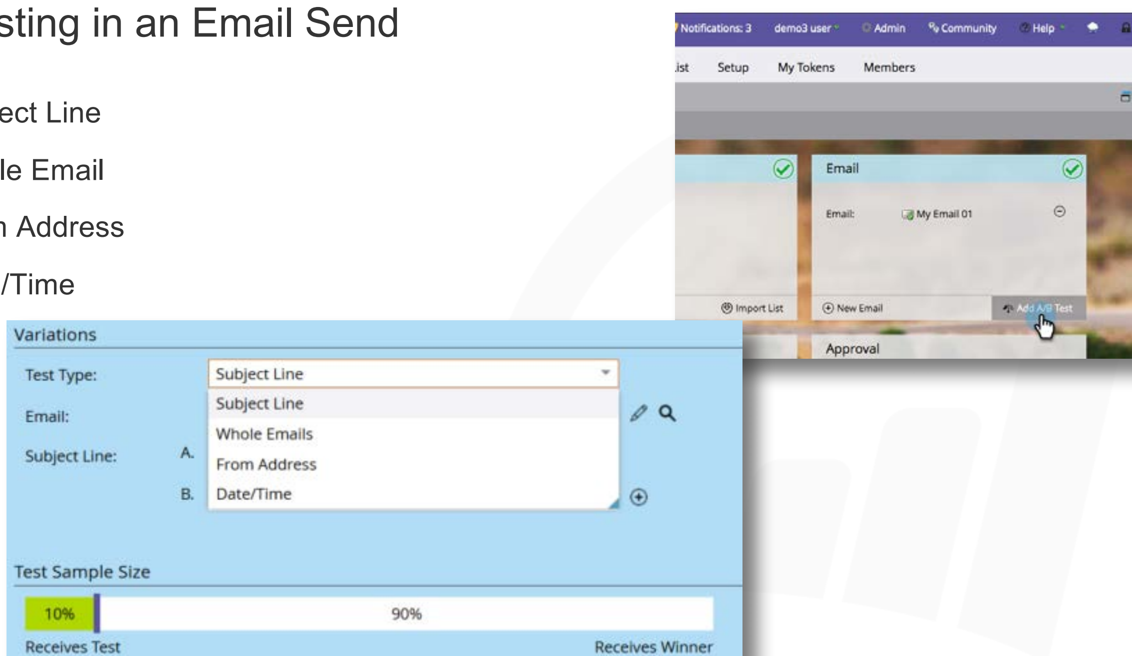
Transition Rules

- You need to have more than one stream
- Pull into a stream
- Add the triggers and filters you would like to use to move the leads through the stream



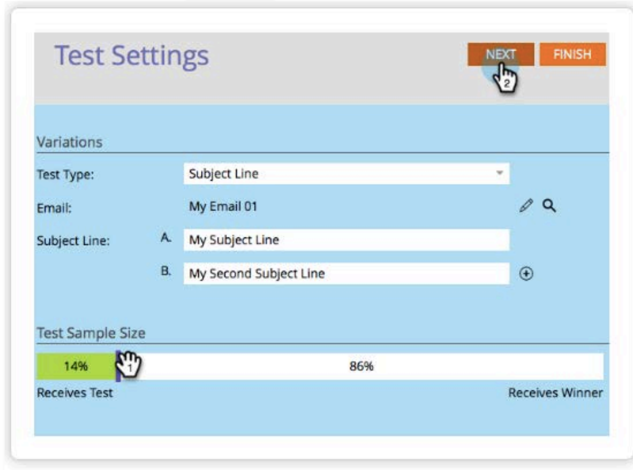
A/B Testing in an Email Send

- Subject Line
- Whole Email
- From Address
- Date/Time



A/B Test Settings

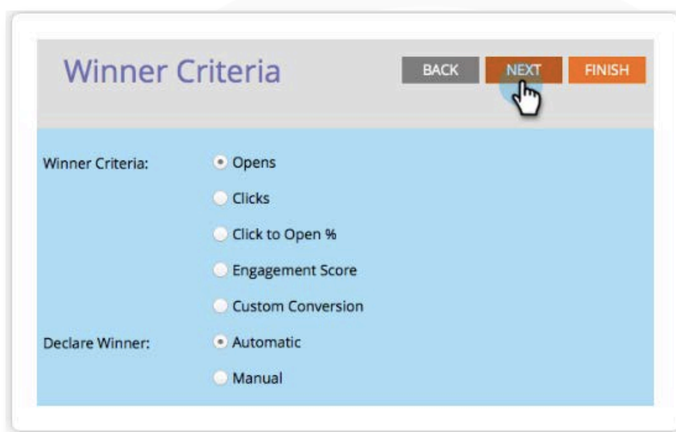
Use the slider to choose what percentage of the audience you want to receive your A/B test



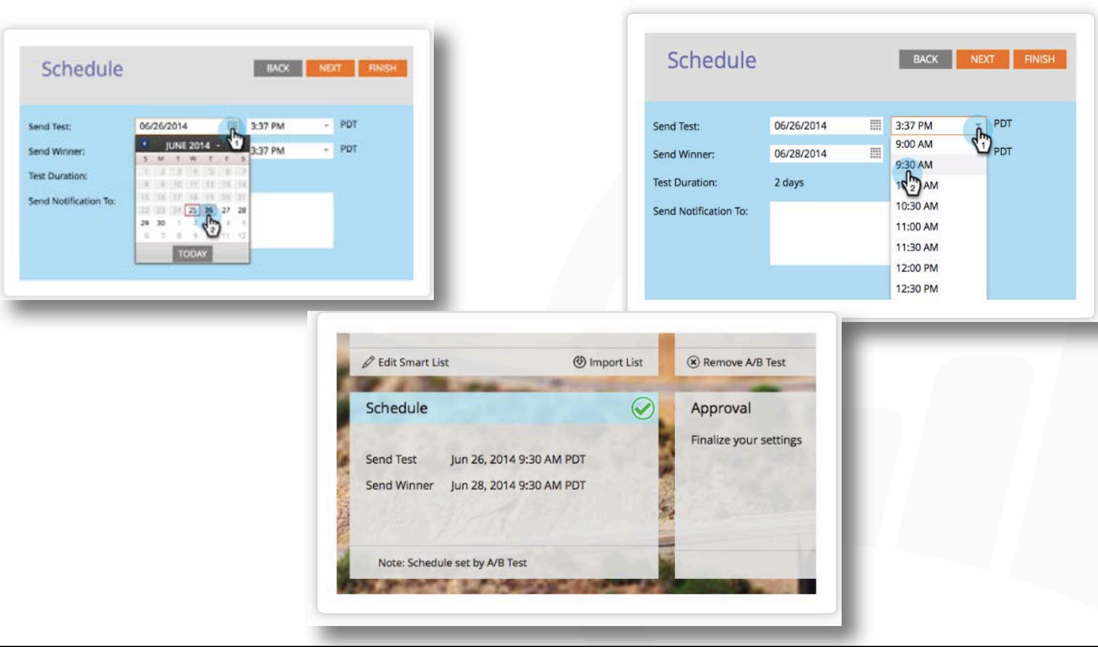
Winner Criteria

Select one of the Winner Criteria options available:

- Opens
- Clicks
- Click to Open %
- Engagement Score: this type of test will need to run at least for 24 hours
- Custom conversion: allows you to pick any event as a conversion by using triggers and filters

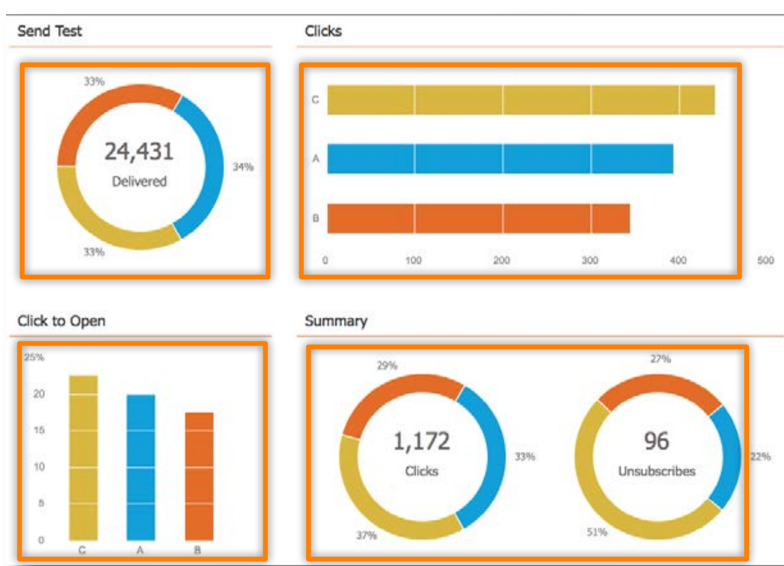


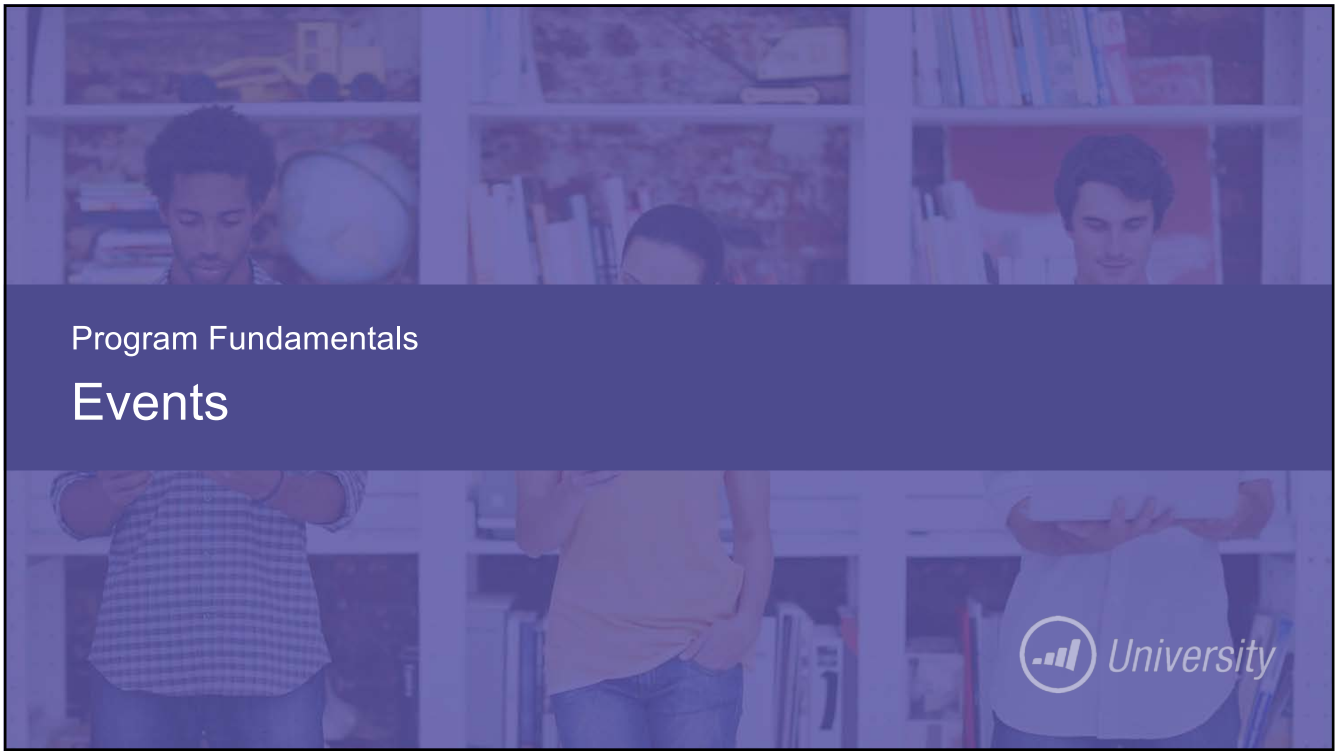
Schedule: A/B Test



Email Program A/B Testing

- Engagement score
- Opens
- Clicks
- Click to open
- Unsubscribes

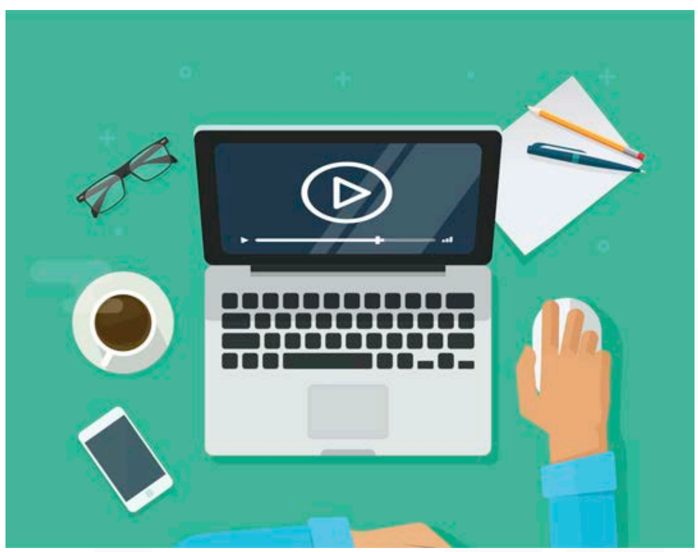




Event Webinar Program

LaunchPoint Event Partners

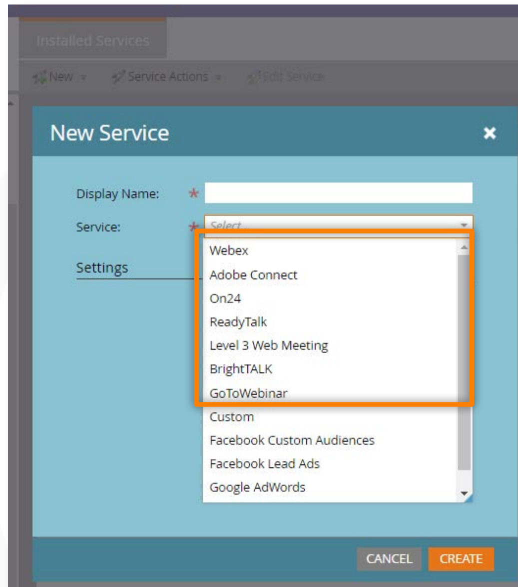
- WebEx
- Adobe Connect
- ON24
- ReadyTalk
- BrightTALK
- GoToWebinar



Webinar API

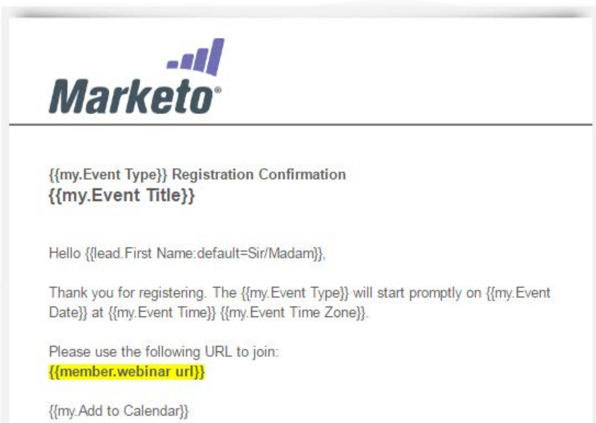
Connect Marketo to a LaunchPoint event partner in Admin to automate your online events. When you connect them, you can:

- Manage your webinar events
- Push registration information captured on a Marketo landing page to the configured LaunchPoint event partner
- Pull attendance information automatically into a Marketo event
- Track the program status of people as they engage throughout the event



Custom Confirmation Link Token

- When a lead registers for your webinar, they are assigned a unique confirmation URL that can be used to customize your assets
- To populate your confirmation email with this unique URL, use the following token in your email: **{{member.webinar url}}**
- Set your confirmation email to Operational



Tip: You can nest the webinar url token in your calendar file token description!

Live Events

Prepare for your event:

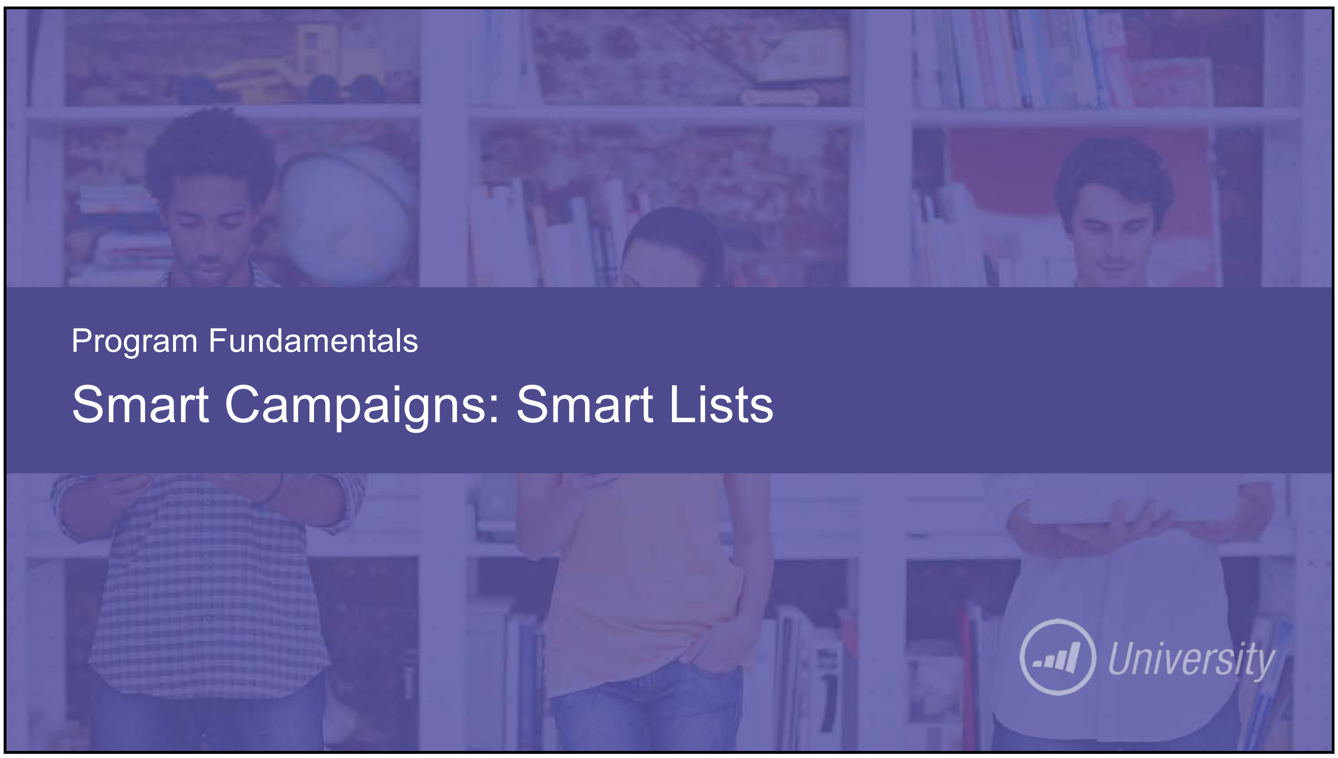
- Create a new Marketo role for iPad or Android users for the event
- Invite new tablet users to the event and assign them the new role
- Create a new Marketo event program
- Specify the event dates
- Add leads to your event

Set Up the iPad or Android Tablet

- Download and install the Marketo Events iPad or Android tablet app
- Confirm login credentials
- Sync the app to populate the event
- Confirm check-ins are working

Check People In Using the iPad or Tablet

- Log in to the app
- Find guests (and create new leads)
- Check in guests (reverse check-ins, edit lead records at check-in)
- Sync the iPad or Android tablet app with Marketo



Types of Smart Campaigns

Filter campaigns

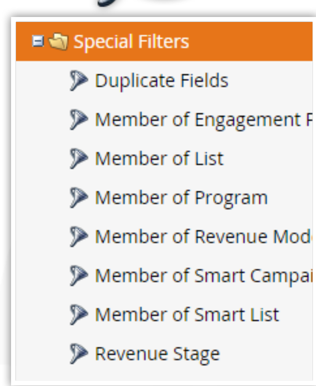
- Search for leads based on specific attributes
- Can be scheduled to run on specific dates and times
- Can be “batched” (batch filter campaigns)

Trigger Campaigns

- Look for lead behavior, fire off when actions occur
- Cannot be scheduled, triggered automatically when the behavior occurs

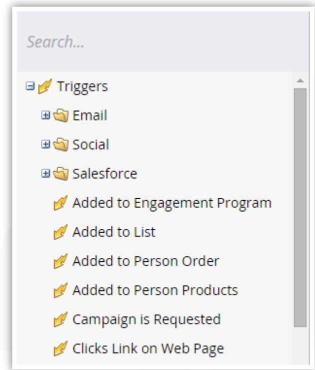
Batch Filter Campaigns

- Use filter smart lists to search for lead attributes:
  - Lead history
  - Segmentation
  - Inactivity
  - CRM data
- Leads that meet filter criteria are sent to the flow step
- The Special Filters folder includes filters on smart list membership and more



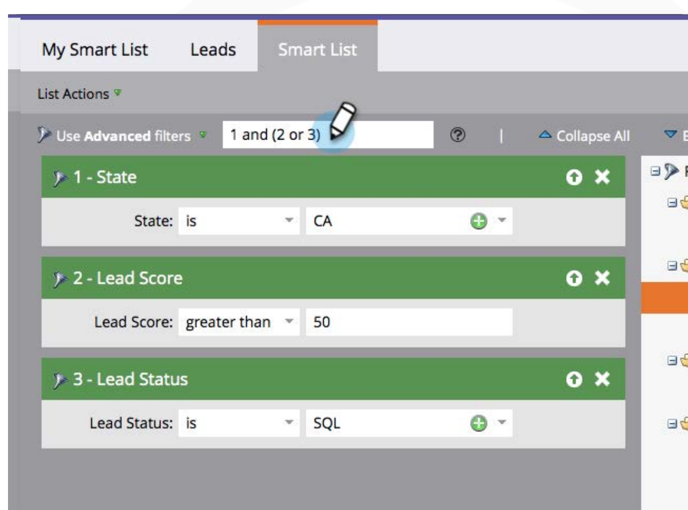
Trigger Campaigns

- Use trigger smart lists to look for lead behavior:
  - Web
  - Email
  - Social
  - CRM data changes
  - And much more
- Lead actions and behaviors trigger the campaign flow step



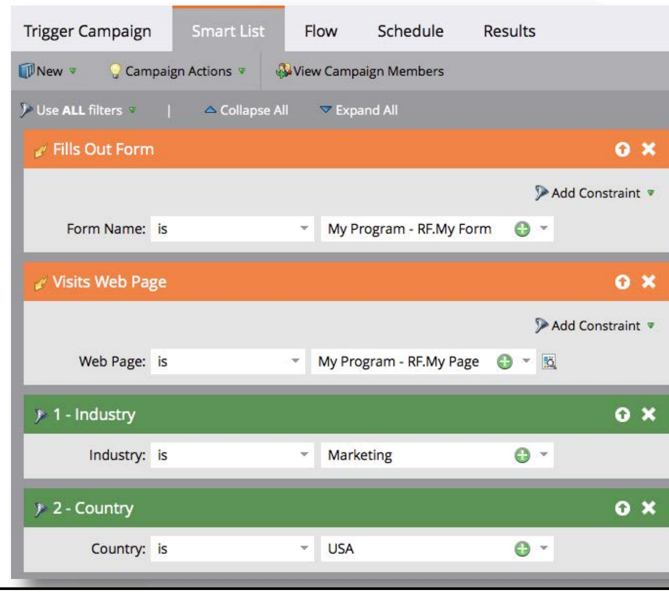
Smart List with Filters

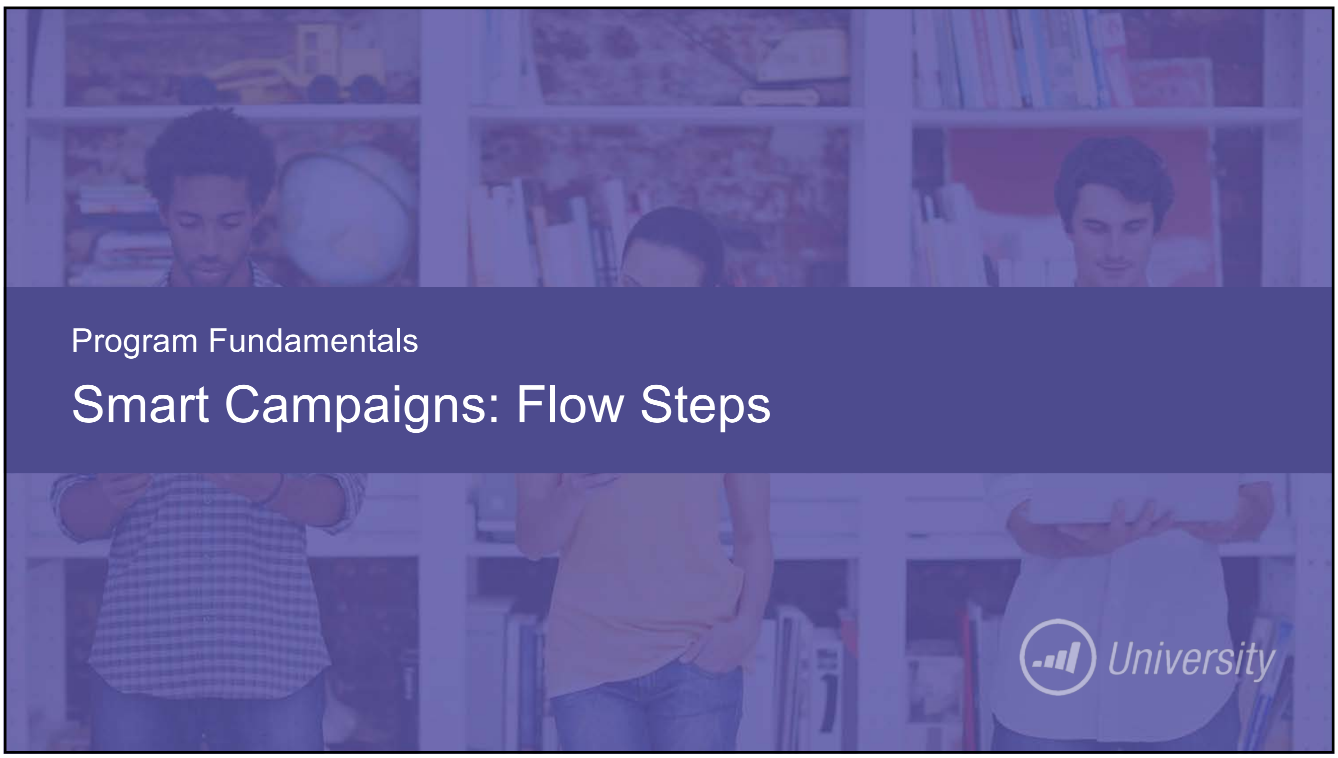
- In the situation of two filters in a smart campaign, the setup can be for the lead to qualify for both filters (AND) or for the lead to qualify for one/either of the filters (OR)
- If you have three or more filters you can use advanced logic, where you can combine AND statements, OR statements, and parentheses



Smart Lists with Triggers

IF lead fills out My Form
OR
IF lead visits My Page
AND
Industry is Marketing
AND
Country is USA
THEN follow the campaign's Flow steps



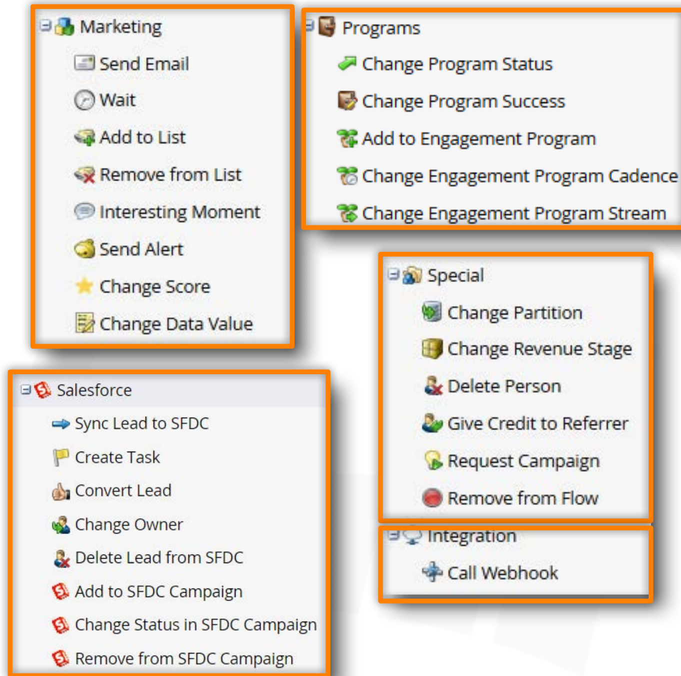


Program Fundamentals

Smart Campaigns: Flow Steps

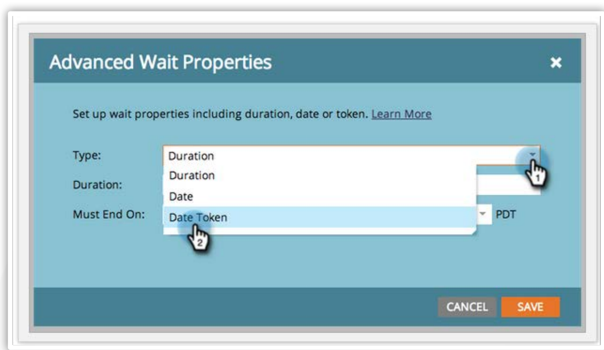
Campaign Flow Steps

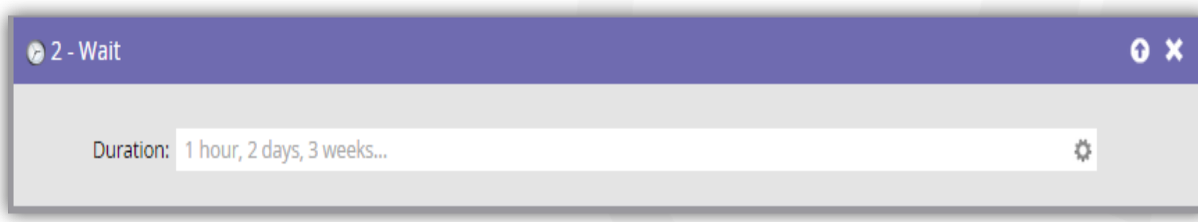
- External-facing and internal actions
- Flow steps affecting lead data and outgoing activities
- Flow steps affecting membership and status
- Workspaces/partitions, revenue model, social
- Take direct action in your CRM
- Webhook, API, and custom integration steps



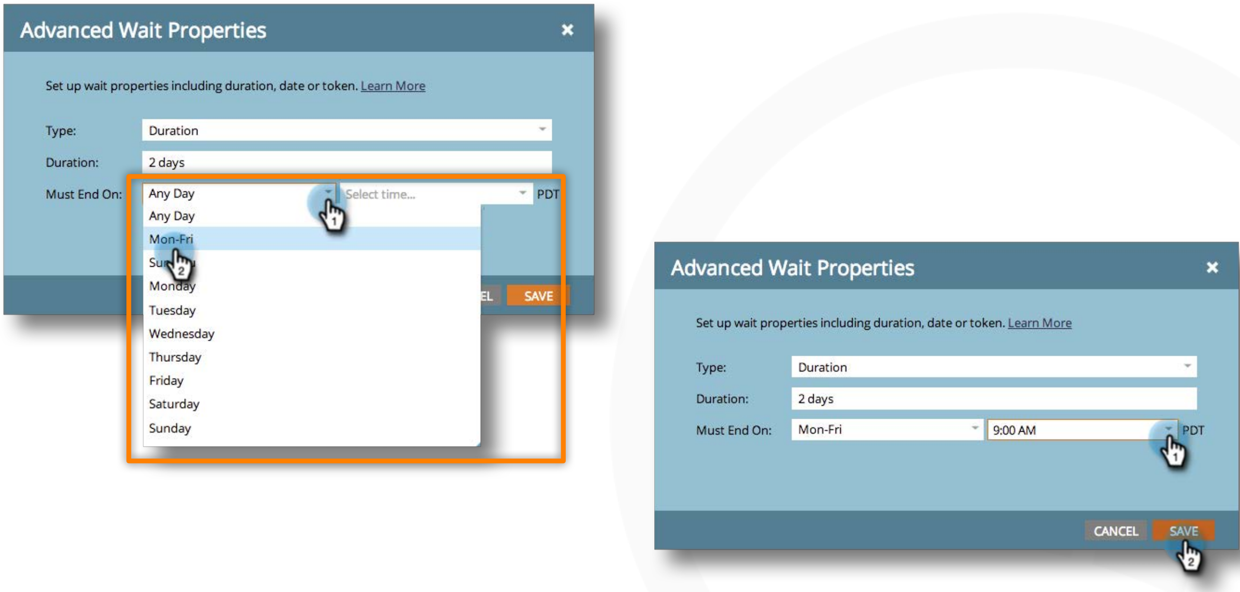
Just Wait a Minute or More!

- Write in naturally
- Use the gear for advanced options
  - Duration
  - Date
  - Date Token

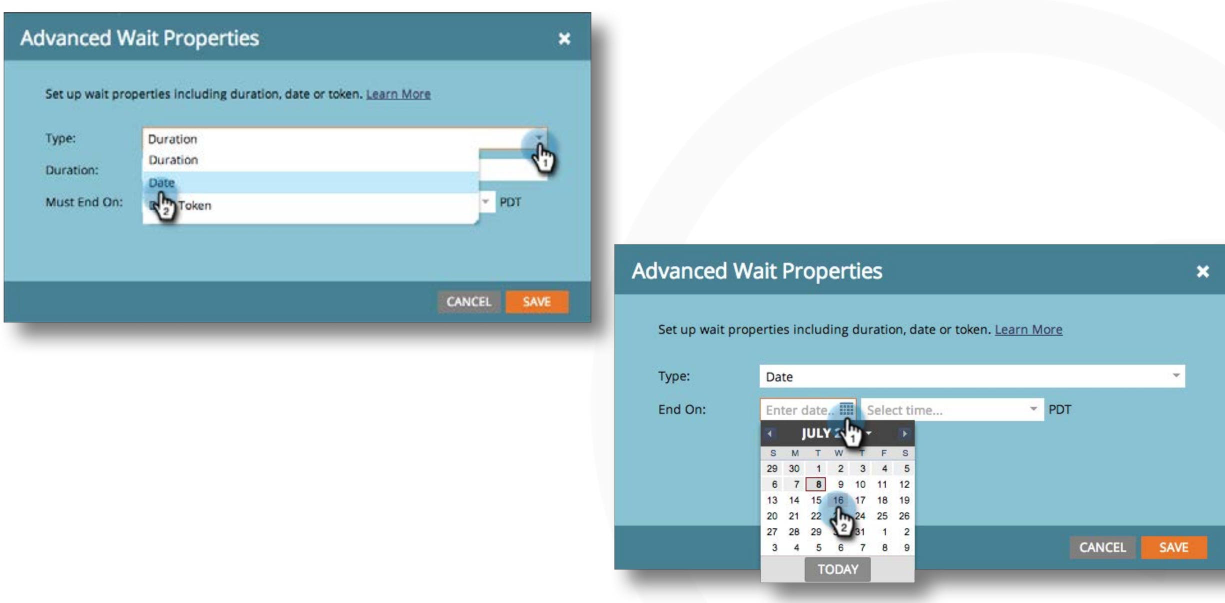




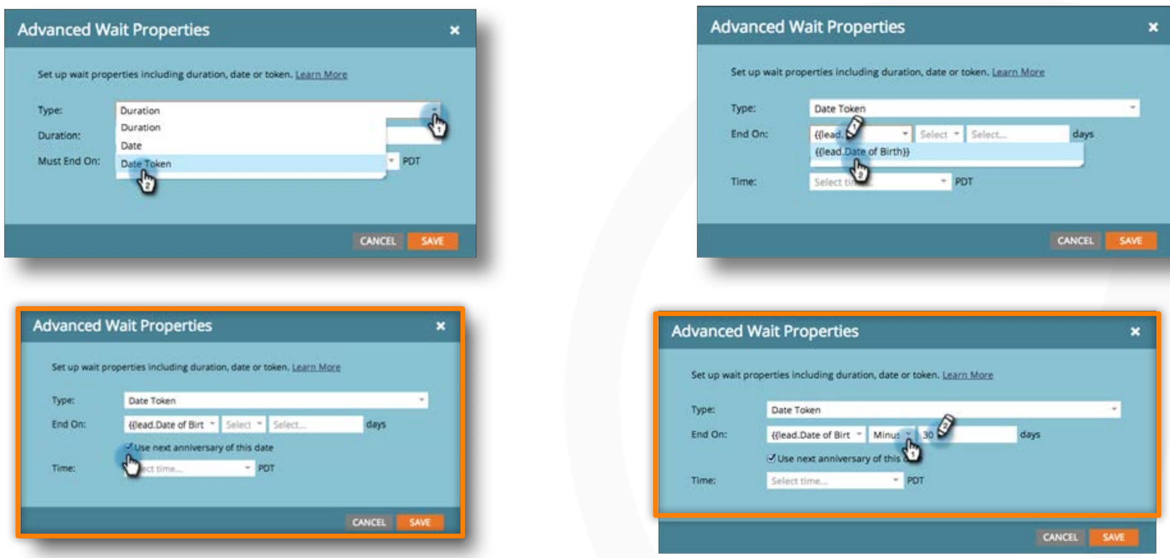
Use a Duration in a Wait Flow Action



Use a Specific Date in a Wait Flow Action

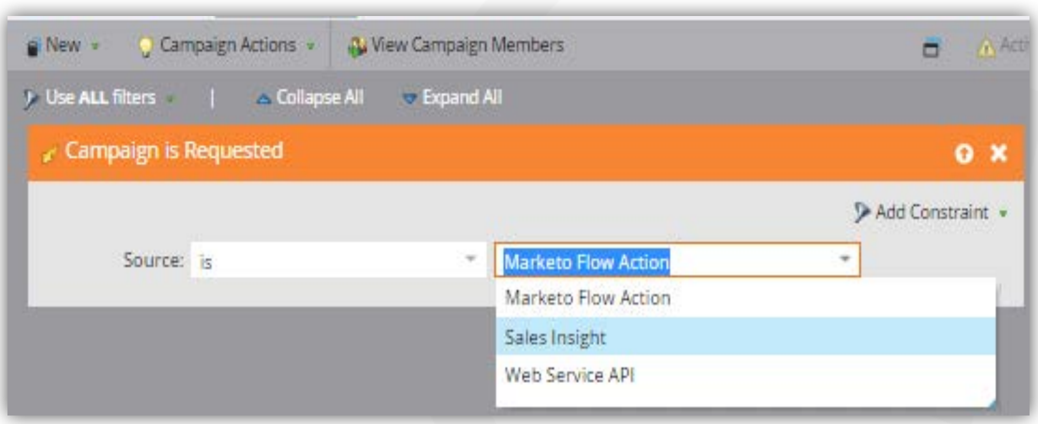


Use a Date Token in a Wait Flow Action

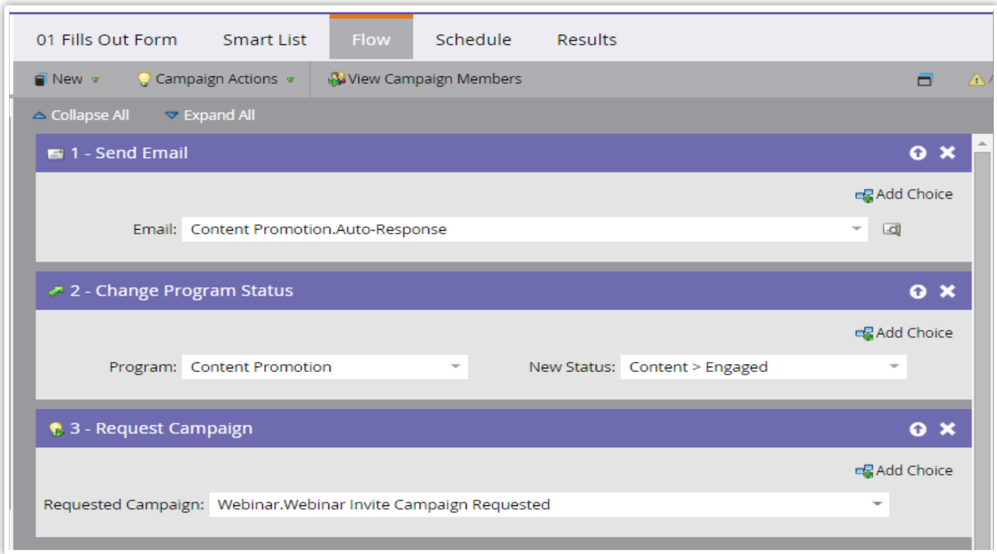


Campaign Is Requested / Request Campaign

- Campaign is Requested is a trigger
- Request campaign in a campaign flow step

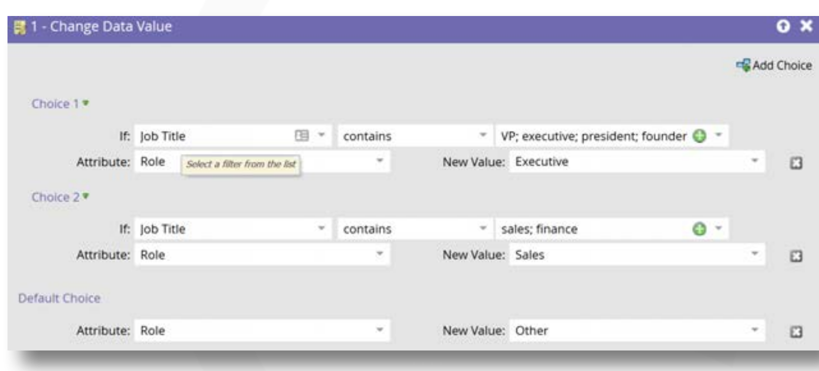


Request Campaign Flow Step



Flow Step Order of Choices

- The order of the choices in a flow step is important because the first choice takes precedent even if the lead would have qualified for later choices.
- If the lead doesn't qualify for the first choice, it will then progress to the second choice and so on.



Flow Step Best Practices

- Take care of the customer first
- Use Add Choice strategically
- After scheduling, the order of flow steps matters!
  - Add new flow steps at the end

Exam Prep Study Tips

- Understand program types and what channels correlate with each type
- Know the rationale behind which program type or channel you should use given a use case
- Pay attention to program success and progression step order
- Consider the impact of smart list rules and logic
- Evaluate the importance of flow steps and choices

Practice Questions

Q: You need to mark individuals as attended as they show up to your customer appreciation dinner. Which channel and program type should you use?

A. Webinar channel and the Event program type
B. Email Send channel and the Email program type
C. Live Event channel and the Event program type
D. Operational program channel and Default program type

Practice Questions

Q: You have 2000 leads in an engagement program, 125 of which have exhausted all the content. You recently added new content into the program at the top of the only stream in the program.

How many leads will receive the new white paper at the next cast, assuming there are no deliverability issues and no additional people will be added to the program?

A. 125
B. 875
C. 2000
D. 1125

Practice Questions

Q: Which types of assets can be used in an engagement program stream?

A. Email
B. Report
C. Default program
D. Email Send program
E. Landing page
F. Event program

Practice Questions

Q: A lead fills out a form, and the marketing manager wants two actions to occur immediately:

- Send the lead a confirmation email
- Change the lead's program status to "Registered"

What should be done to ensure this?

A. Set up a smart campaign with a 'Program Status is Changed' trigger in the smart list and a 'Send Email' step in the flow

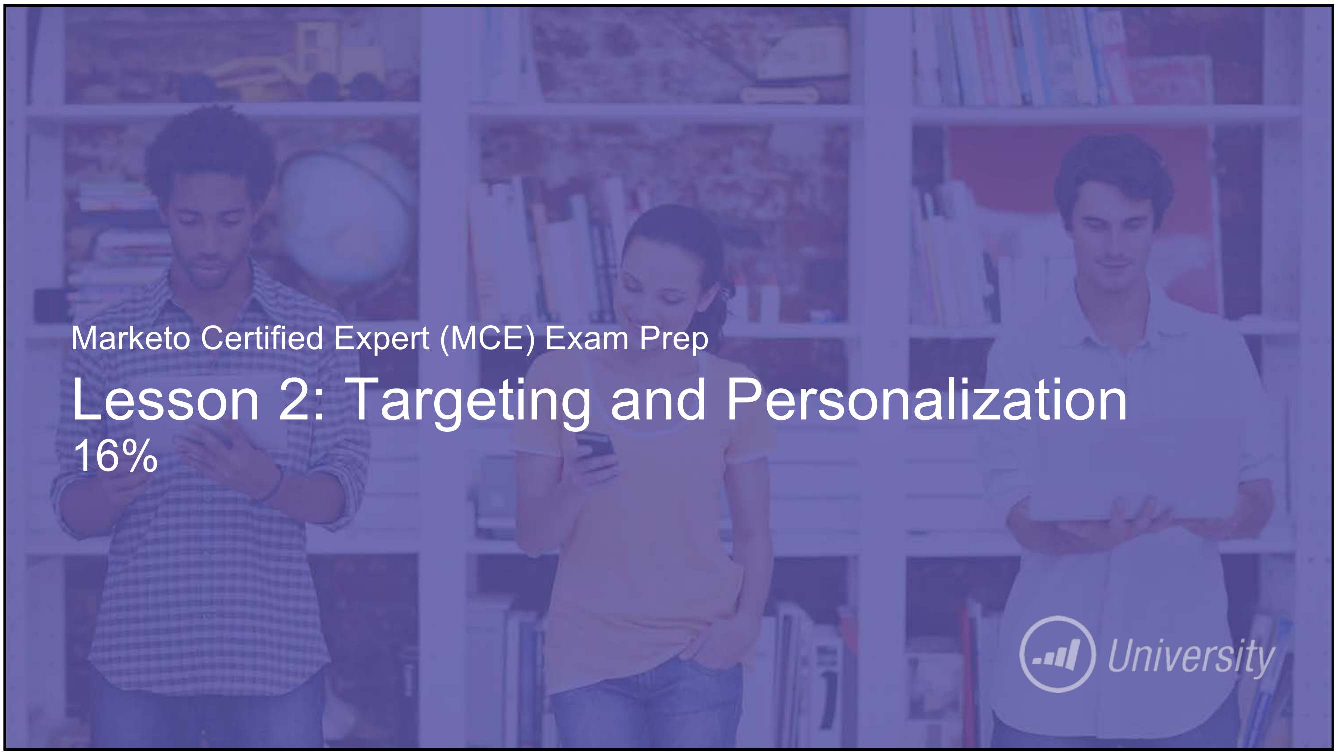
B. Set up a smart campaign with a 'Fills out Form' trigger in the smart list and 'Send Email' and 'Change Data Value' steps in the flow

C. Set up a smart campaign with a 'Fills out Form' trigger in the smart list and 'Send Email' and 'Change Program Status' steps in the flow

D. Set up a smart campaign with a 'Fills out Form' trigger in the smart list and 'Send Alert' and 'Change Program Status' steps in the flow

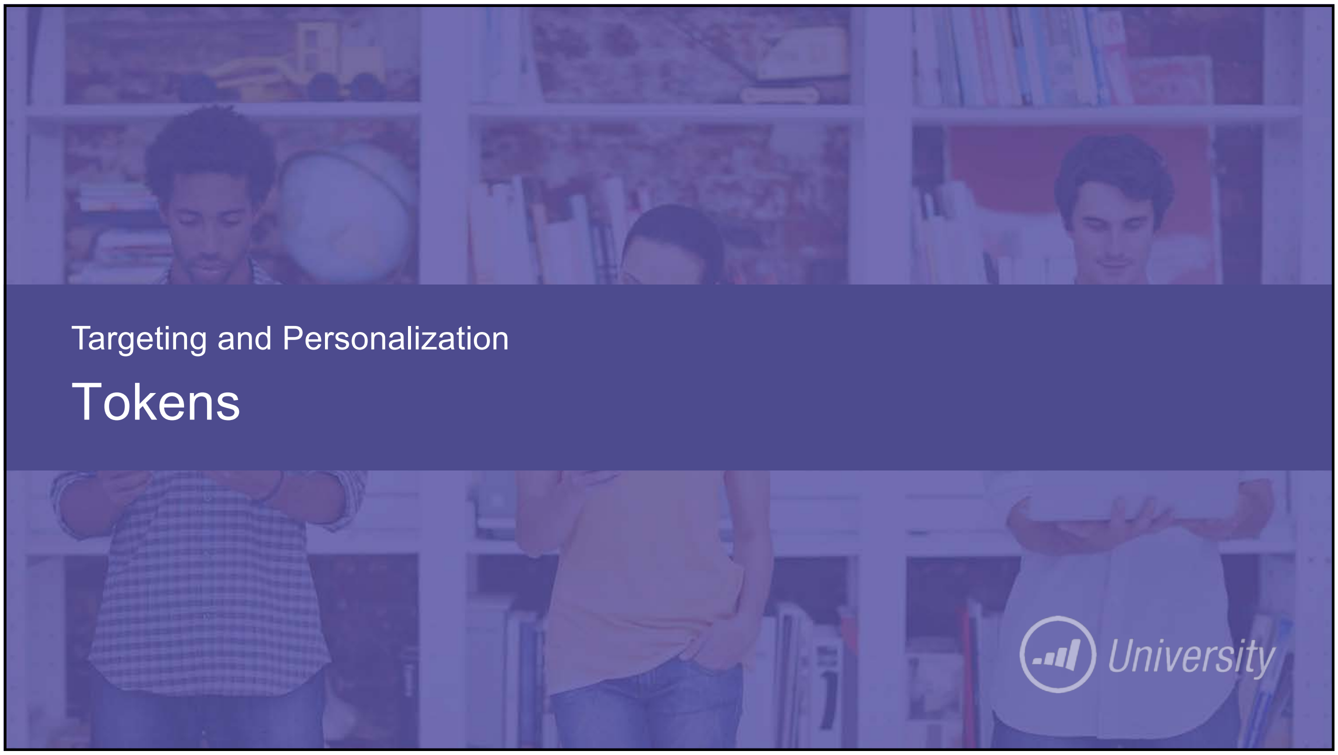
Additional Study Aids

- Understanding Programs
  - Understanding Program Membership
  - Program Channel
  - Use Tags in a Program
  - Create a Program Channel
- Smart Campaign Checklist
- Understanding Smart Campaigns
- Create a New Smart Campaign
- Understanding Email Programs
  - Add an A/B Test
  - View the Email Program Dashboard
- Understanding Event Programs
  - Event Check-in
  - LaunchPoint Event Partners
- Understanding Engagement Programs
  - Set Stream Cadence
  - Turn an Engagement Program On and Off
  - Add Content to a Stream
  - Activate and Deactivate Stream Content
  - Transition Leads Between Engagement Streams
  - Leads Who Have Exhausted Content
  - The Engagement Dashboard
  - Pause Leads in an Engagement Program
  - Add Leads to an Engagement Program
  - Remove a Member from an Engagement Program



What We'll Review

- Best practices for targeting and personalization
- Dynamic content
- Tokens and their use
- Personalization and system tokens in your emails
- My Tokens use and management

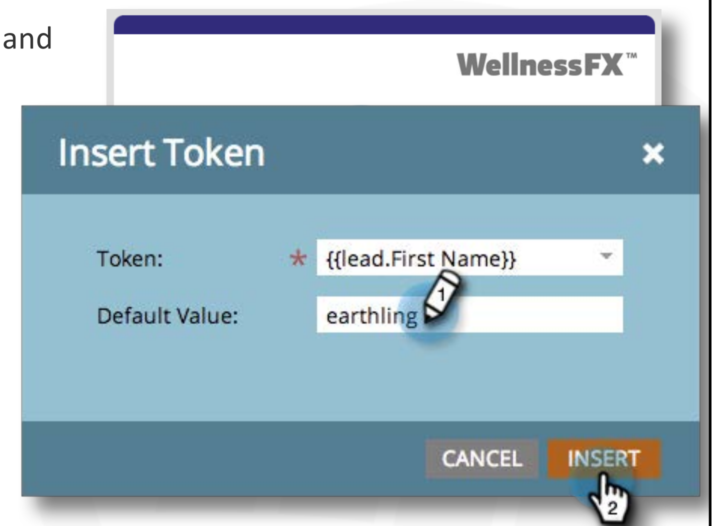


What Are Tokens?

- Placeholders for values, like in mail merge
- Permit personalization on a mass scale
- What kinds?
  - Personalization tokens
  - System
  - My Tokens, related to a program
- Where can they be used?
  - Landing pages
  - Templates
  - Forms
  - Emails

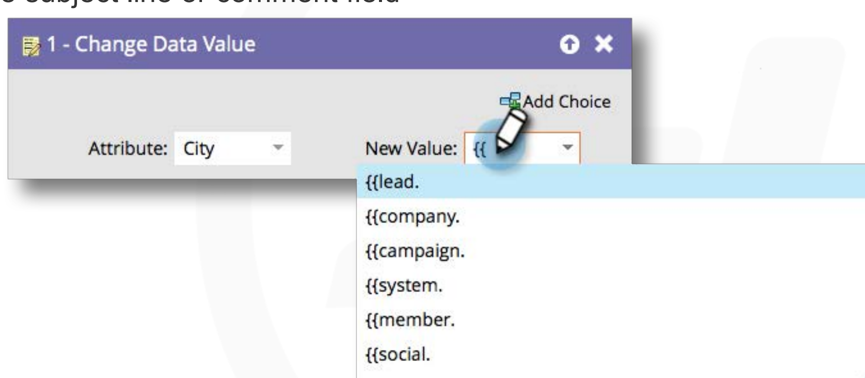
What are Personalization Tokens?

- Enable you to personalize your emails and landing pages with lead and company information
- Examples
  - {{lead.First Name}}
  - {{lead.Last Name}}
  - {{lead.Lead Owner First Name}}
  - {{company.Company Name}}
  - {{company.Industry}}



Other Uses of Personalization Tokens

- Change data value
  - Use a token to enter information from one field into another
- Creating a task
  - Enter information into the subject line or comment field



What are System Tokens?

- Enable you to insert a date in a field or asset, or control the placement of the Unsubscribe link or View as a Web Page link
- Examples
  - {{system.date}}
  - {{system.forwardToFriendLink}}
  - {{system.unsubscribeLink}}
  - {{system.viewAsWebpageLink}}

What are My Program Tokens?

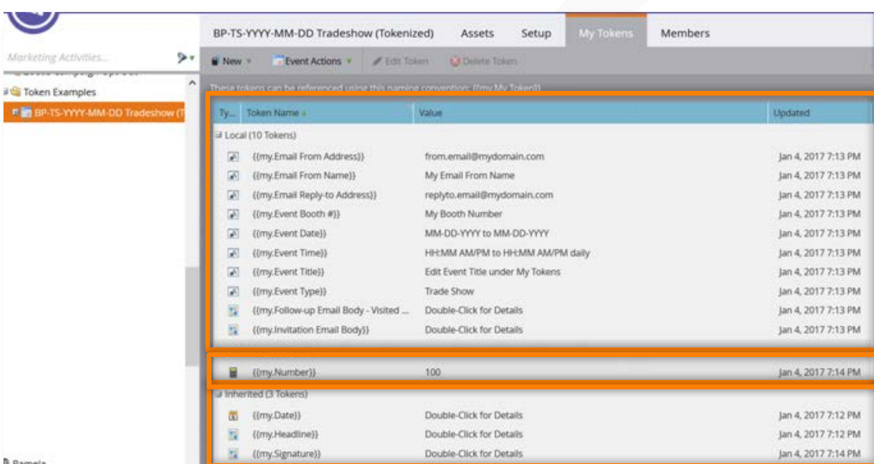
- Enable you to enter information pertaining to your program in one place
- Can be used for emails and landing pages inside your program
- Examples
  - {{my.Event Name}}
  - {{my.Event Date}}
  - {{my.Event Location}}

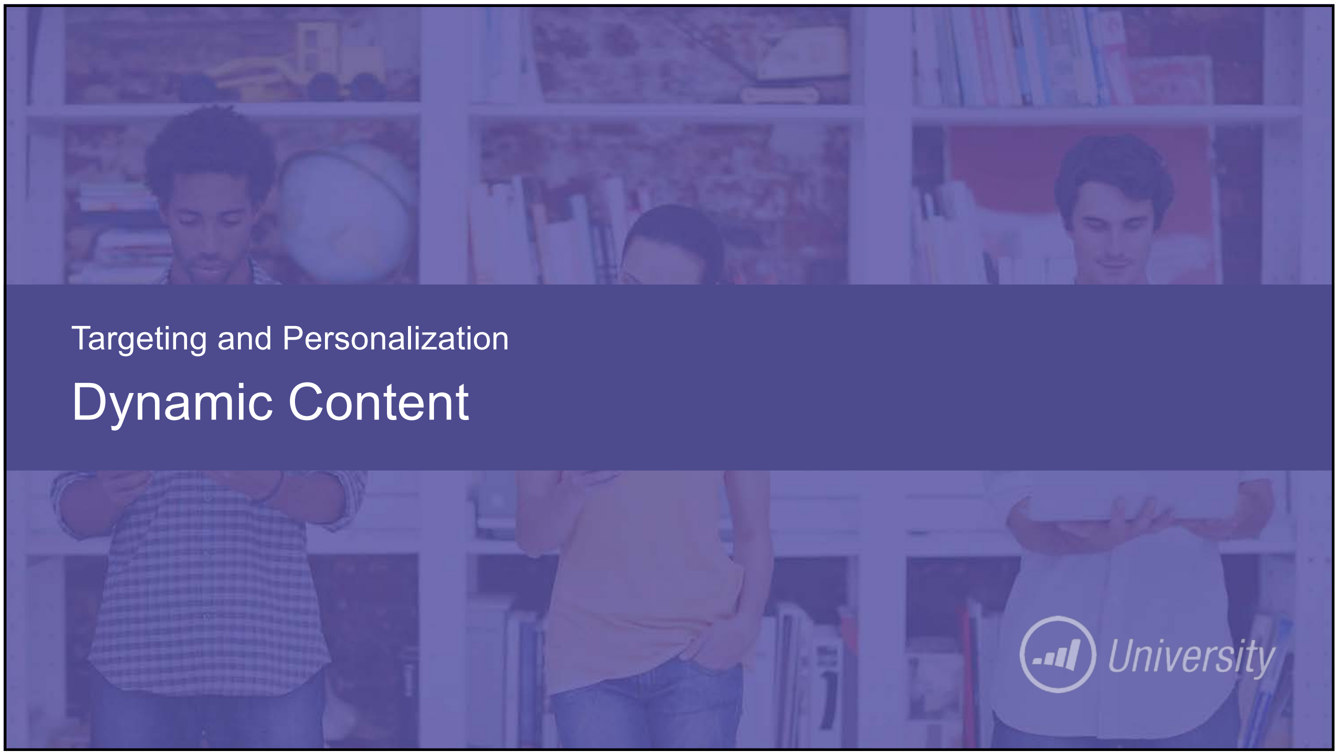
My Program Tokens

Token Type	Description
Calendar File	Use this token to add a calendar event file (.ics) to your emails and landing pages.
Date	This token holds a date value. The date displays year-month-day (i.e. 2016-05-23).
Email Script	Use this token to execute a Velocity script in your emails. Learn more at developers.Marketo.com.
Number	It's just an integer. You know, like 7. It can even be negative.
Rich Text	This is HTML. Use it in emails and landing pages.
Score	Use this token in the change score flow action.
SFDC Campaign	Use this token to allow leads that become part of a Marketo Program to also be added to whatever SFDC Campaign is added.
Text	Just some text. Use it when HTML is overkill. The size limit for Text tokens is 524,288 characters (UTF-8), or 2 MB.

Tokens at the Folder vs. Program Level

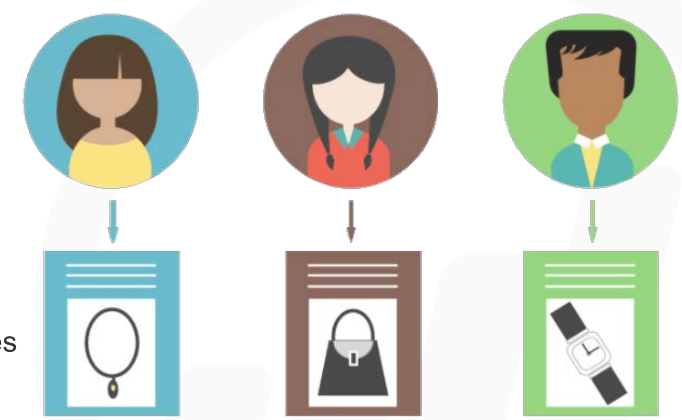
- Create MyTokens in a folder to be available for all programs inside that folder
- Create MyTokens in a program to be available to that program and any clone





Personalizing the Email Experience: Dynamic Content

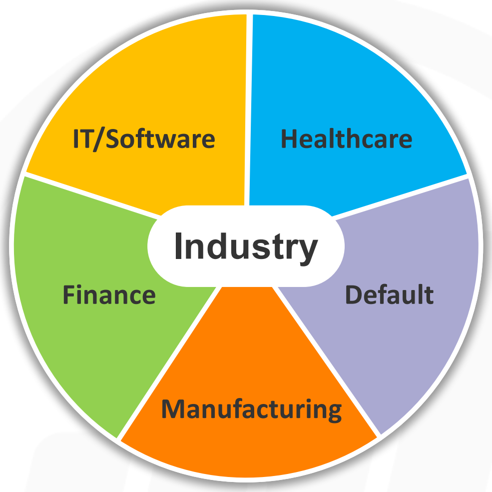
- Dynamic content customizes how different people see the same asset (email or landing page)
- Personalize images, text, hyperlinks, and other content in your assets
- Personalize based on region, source, and more when sending to a large audience
- Dynamic content uses rules called Segmentations to define what attributes determine when dynamic content should be seen



Segmentations and Segments

Examples of segmentations:

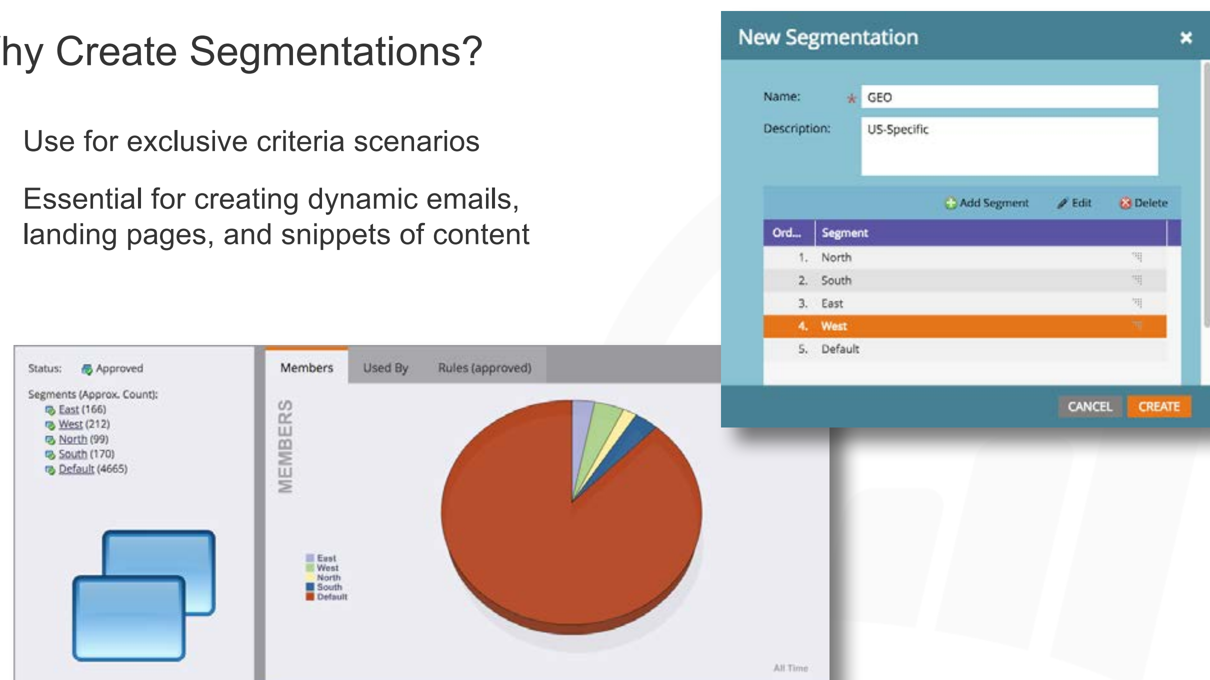
- Industry
- Geographic location
- Size of company
- Role or department
- Any other data you've collected in your list
  - Customer vs. prospect
  - Types of products



Example of Industry segmentation and its segments

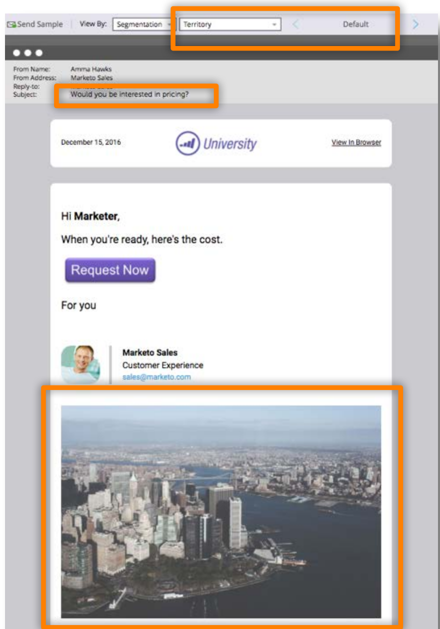
Why Create Segmentations?

- Use for exclusive criteria scenarios
- Essential for creating dynamic emails, landing pages, and snippets of content

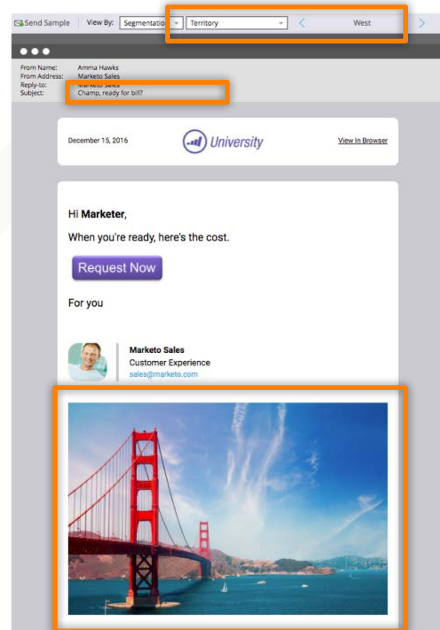


Example: Email with Segmented Dynamic Content by Territory

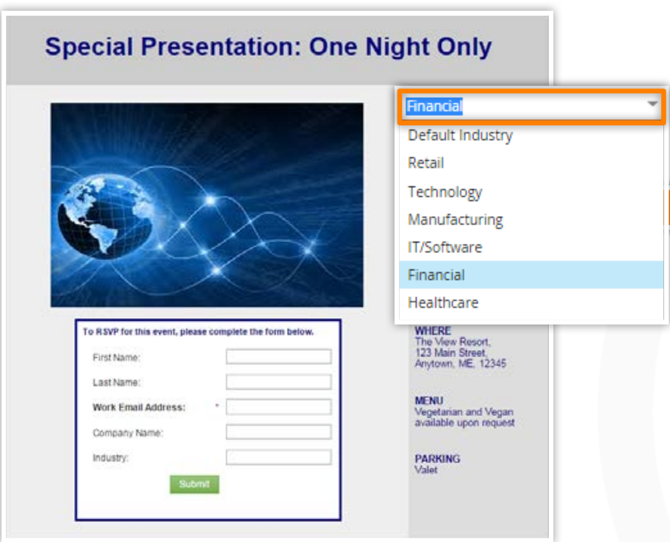
Email for **Default Territory** (no specific segment)



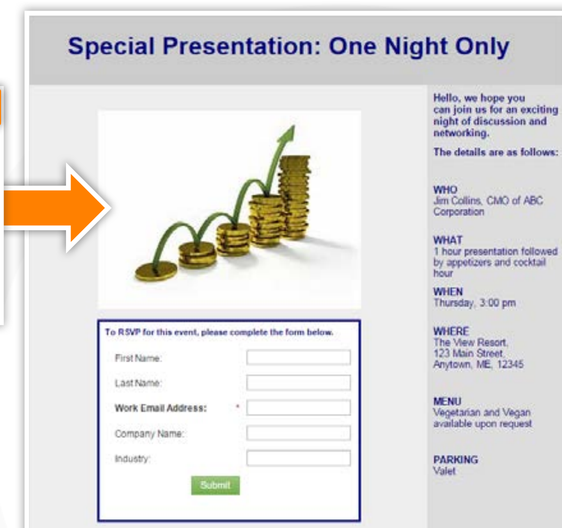
Customized email for **West Territory** (segmented)



Example: Landing Page with Segmented Dynamic Content (1 of 2)

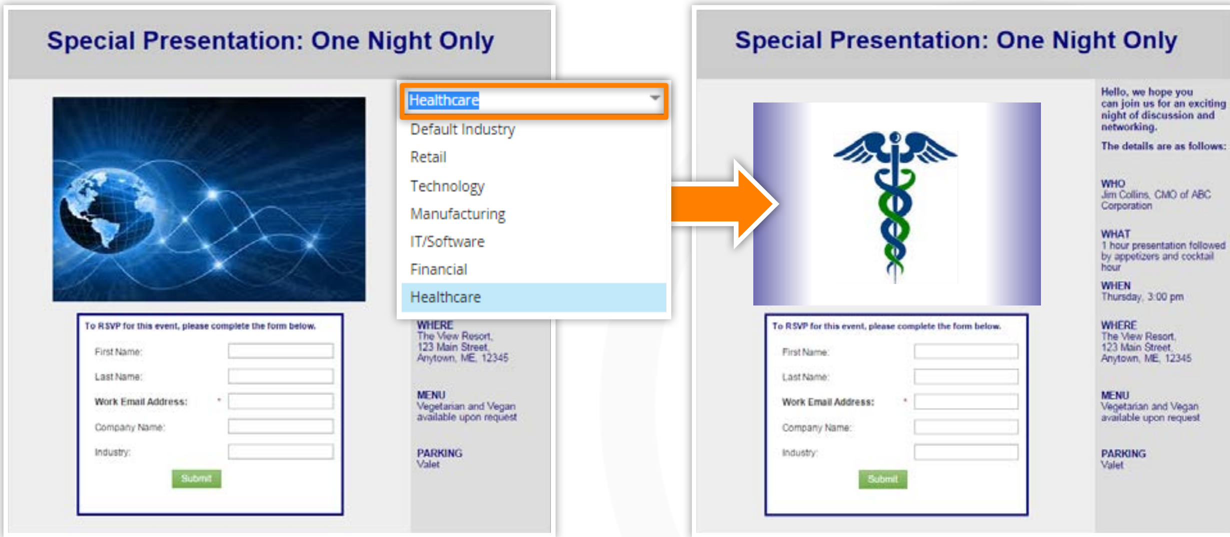


Landing page for **Default** industry (no specific segment)



Customized landing page for **Finance** segment

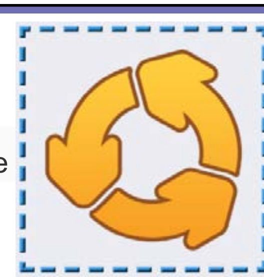
Example: Landing Page with Segmented Dynamic Content (2 of 2)



Landing page for **Default** industry (no specific segment)

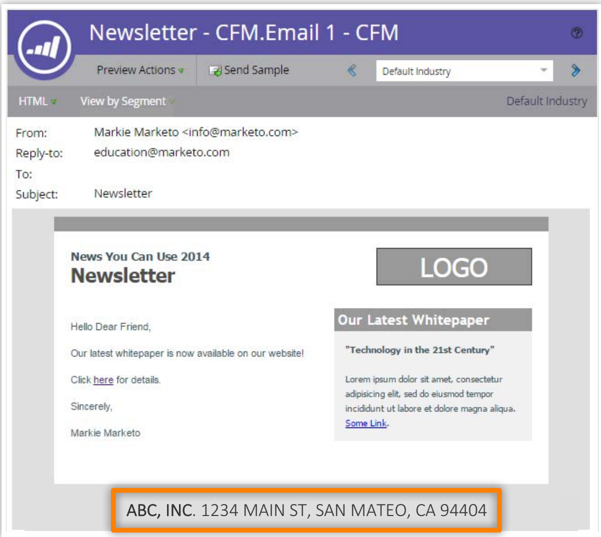
Customized landing page for **Healthcare** segment

What Are Snippets?

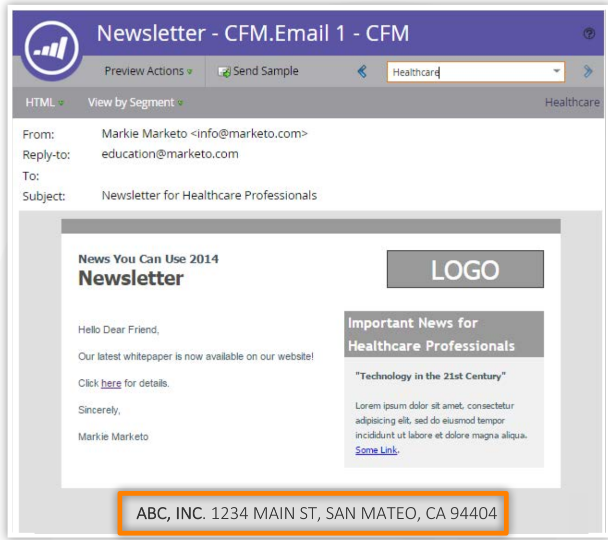


- Reusable blocks of content that can be used in any email or landing page
- Created in Design Studio, can be a token, text, or image (preloaded)
- Static snippets
  - Freely available everywhere
  - Examples: legalese, required or “boilerplate” copy; senior executive bios
- Dynamic snippets
  - Attached to a segmentation
  - Examples: footer with local address segmented by region; paragraph of newsletter segmented by industry

Example: Segmented Email with a Static Snippet

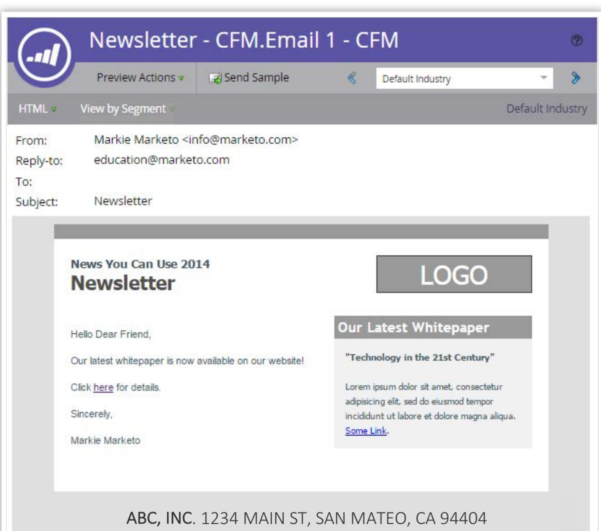


Email for **Default** industry (no specific segment)

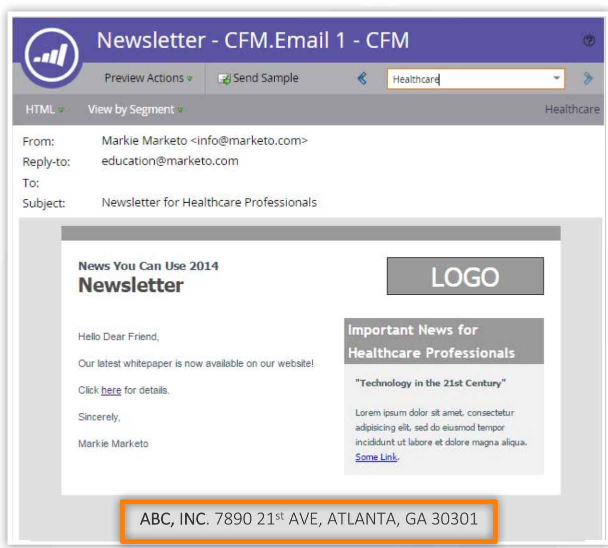


Customized email for **Healthcare** industry (segmented)

Example: Segmented Email with a Dynamic Snippet



Email for **Default** location (no specific segment)



Customized email for **Southeast USA** segment


TIME FOR A
BREAK


Targeting and Personalization
Tips, Additional Resources, and Practice Questions
University

Exam Prep Study Tips

- Understand the requirements for dynamic content
- Review why a segmentation is different than a smart list
- Understand how token hierarchy works with folders and programs
- Review and be able to identify the proper use of tokens and the types of tokens in Marketo

Practice Questions

Q: Looking at the image:

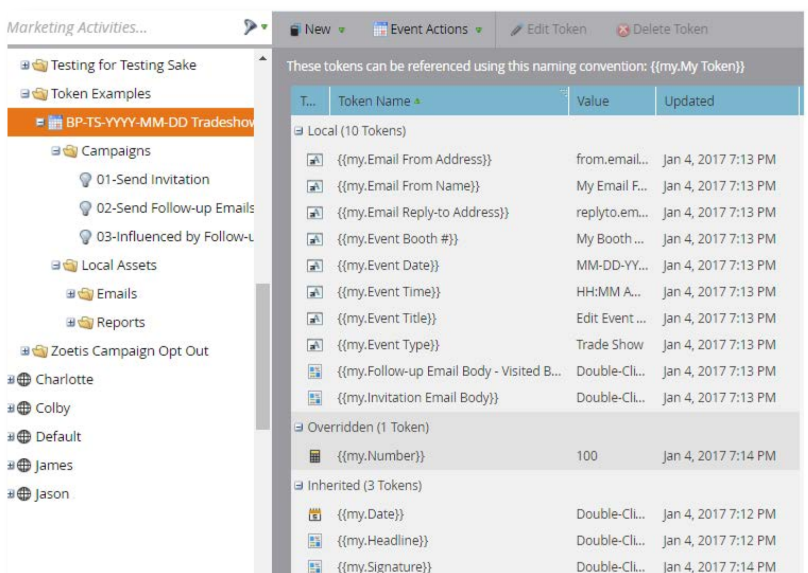
From where are the tokens inherited?

A. Token Examples Folder

B. Campaigns Folder

C. Testing for Testing Sake Folder

D. BP-TS-YYY-MM-DD-Tradeshow Program



Practice Questions

Q: What is the difference between segmentations and smart lists?

A. A lead can exist in multiple segments but not in multiple smart lists

B. Smart lists can be used in smart campaigns while segmentations cannot

C. Segmentations can be used to create dynamic content while smart lists cannot

D. Smart lists can be used as a filter option when creating an email program while segmentations cannot.

E. Smart Lists are not mutual exclusive, but segments are.

Practice Questions

Q: What is a prerequisite for using dynamic content?

A. Emails are active

B. An approved snippet

C. An approved segmentation

D. Activity log tracking is active

Practice Questions

Q: Which three steps should a marketer use to make an unsubscribe page appear in the readers local language?

A. Update the individual languages and set your default

B. Create a smart list for each preferred language

C. Create a segmentation for language with a segment for each preferred language

D. Create the content block on the landing page as dynamic, selecting the preferred language segmentation

E. Create the content block on the landing page as dynamic, selecting the preferred language smart list for each language

Additional Study Aids

- Understanding Dynamic Content
  - Segmentation and Snippets
  - Define Segment Rules
  - Create a Segmentation
  - Use Segment Filters in a Smart List
  - Using Dynamic Content in an Email
- Best Practices for Smart Lists
- Tokens Overview
  - Understanding My Tokens in a Program
  - Use a Date Token in a Wait Flow Action

What We'll Review

Analytics and reporting in Marketo

- Types of reporting
- How to set up reporting
- Best types of reporting by use case

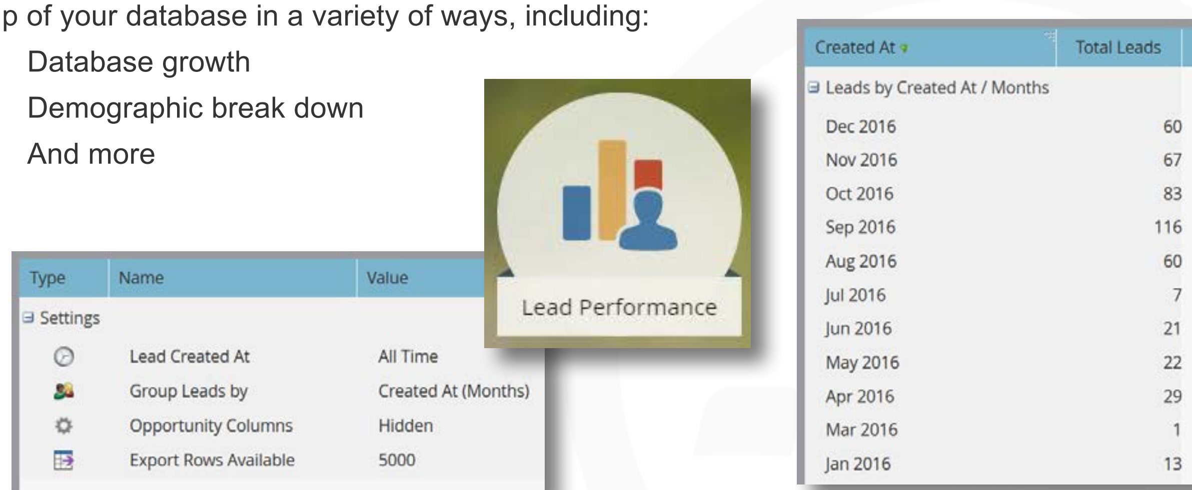
Marketo Report Types

Report	Description
Company Web Activity	Report on web activity to your landing pages and public website, grouped by company.
Email Link Performance	Stats on the individual links in your emails.
Email Performance	Review interactions with your emails: delivered or bounced, opened, clicked, unsubscribed, etc.
Engagement Stream Performance Report	See how well your engagement program is working.
Landing Page Performance	Not a replacement for Google Analytics, but still really good information.
Lead Performance	Group leads by any attribute and include opportunity info. Drill down and explore.
Leads by Revenue Stage	Basic reporting for your Revenue Model. See Revenue Cycle Analytics for deeper reporting.
Leads by Status	Automatic reporting based on the Lead Status field.
Program Performance	Basic program metrics like members and success. See Revenue Cycle Analytics for deeper reporting.
Sales Insight Email Performance	Review interactions with your emails sent through Marketo Sales Insight in Salesforce, Microsoft Dynamics, and the Outlook and Gmail plug-in.
Social Influence	Review the social activity you're generating, and see how often your leads tell their friends about you.
Web Page Activity	Report on web activity to your landing pages and public website.

Performance Report

The Performance Report is a very flexible report type that allows you to analyze the make up of your database in a variety of ways, including:

- Database growth
- Demographic break down
- And more

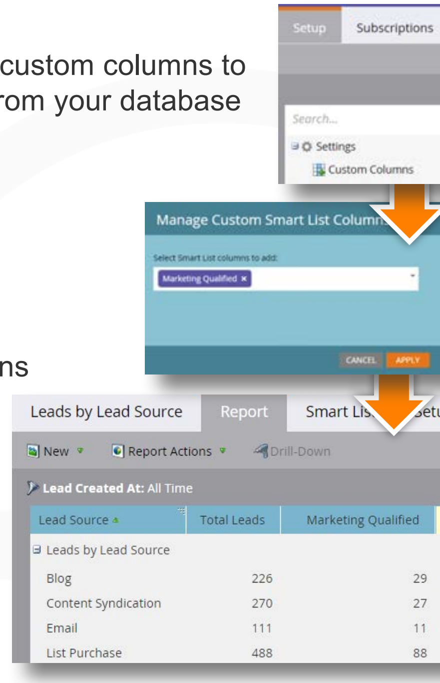


Custom Column in a Performance Report

Performance reports can be further customized by adding custom columns to them. Custom columns allow you to reference smart lists from your database area.

To add a custom column to a report:

- Create a Lead Performance report
- Select the **Setup** tab
- Pull over **Customer Columns** from Settings
- Select the smart lists you want to add as custom columns



Tips
- You can add up to 10 custom columns
- Create a folder in the Lead Database for Smart Lists needed for reporting.
- Name your Smart Lists as you would like them to appear as column headers.

Landing Page Performance Report

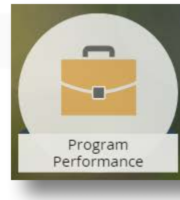
You can use a Landing Page Performance report to show the conversion rate for a specific landing page. This report type will show you:

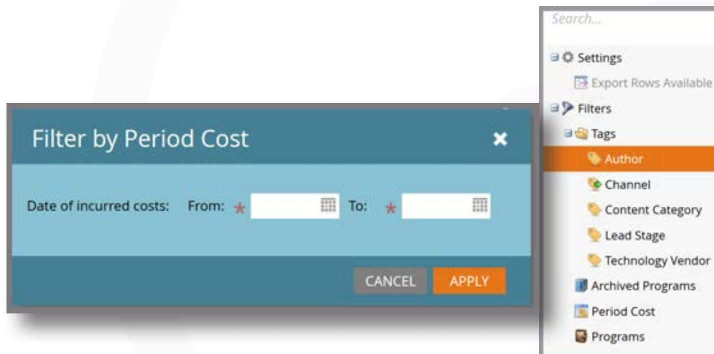
- Total views
- Total conversions (submission of form)
- How many were new leads

Total View...	Conversions	Conversio...	New Names
2279	6	0.26	3
403	18	4.47	4
264	5	1.89	3
203	0	0	0
67	3	4.48	2
62	4	6.45	3
53	0	0	0
45	0	0	0
41	15	36.59	14
36	1	2.78	0

Program Performance Report

- The Program Performance Report allows you to report on:
  - The success of your marketing programs
  - The number of successes
  - The cost per success
- To measure new leads from programs, it is essential that you utilize the acquisition program functionality within Marketo to track and measure which programs are bringing in new names





Exam Prep Study Tips

- Review all the report types in the Analytics:
  - How to create and save as well as how to clone
  - Smart list options (not all of them have this option)
  - Set-up options (remember, these vary by report type)
  - Report options (Adding and removing columns, reordering columns, and so forth)
  - Subscription options
- Consider why you might use each report type

Practice Questions

Q: How can you determine which leads filled out the form on a specific landing page?

A. Create a Landing Page Performance Report

B. Create a form submission list in the Design Studio

C. Create a smart list using the filter "Filled out form" with the constraint of "Web Page"

D. Create a smart list using the filter "Visited Web Page" with the constraint of "Form = True"

Practice Questions

Q: When should custom columns be added to a lead report?

A. To display anonymous visitors in a Web Page Activity report

B. To change the Lead Created At time frame to show results for the fiscal year

C. To review email statistics on number delivered, number bounced, and open rates

D. To show how leads that were created this year have progressed through the lifecycle

Practice Questions

Q: What is the reporting impact of selecting an acquisition program when importing a list?

A. Selecting an acquisition program is required for using the Success Path Analyzer.

B. The acquisition program is required to show program success in the Email Performance report.

C. The acquisition program is required to show the number and percent of new names in the Program Performance report.

D. The Lead Performance report uses an acquisition program to show how successful each program is at generating new leads.

Practice Questions

Q: You want to analyze marketing's overall lead generation efforts to grow the database over the past three years. Which report type should you run?

A. Program Analyzer

B. Leads by Status Report

C. Lead Performance Report

D. Leads by Revenue Stage Report

E. Opportunity Influence Analyzer

Additional Study Aids

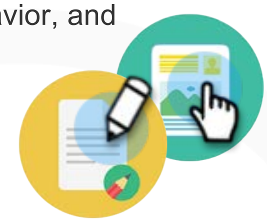
- Basic Reporting
- Report Types
- Subscribe to a Report
- Manage Report Subscriptions
- Filter Leads In a Report With a Smart List
- Add Custom Columns

What We'll Review

- Lead scoring best practices
- How to alert sales of sales ready leads
- Resetting a score to the appropriate value

Benefits of Lead Scoring for Marketing

Remember, lead scoring isn't just for Sales! Marketing can use lead, behavior, and demographic scoring to help marketers determine the quality of a lead.



Behavioral score (changes often):

- Rules can run once, every time, or a set number of days
- To avoid over-scoring, limit rules to 1x/day or frequent actions (visit webpage, click links)

Negative scoring (score decay):

- Reset, or decrease score for inactivity
- Leads returned from Sales, disqualified, or recycled
- Unsubscribes or takes other negative action

Demographic score (typically doesn't change):

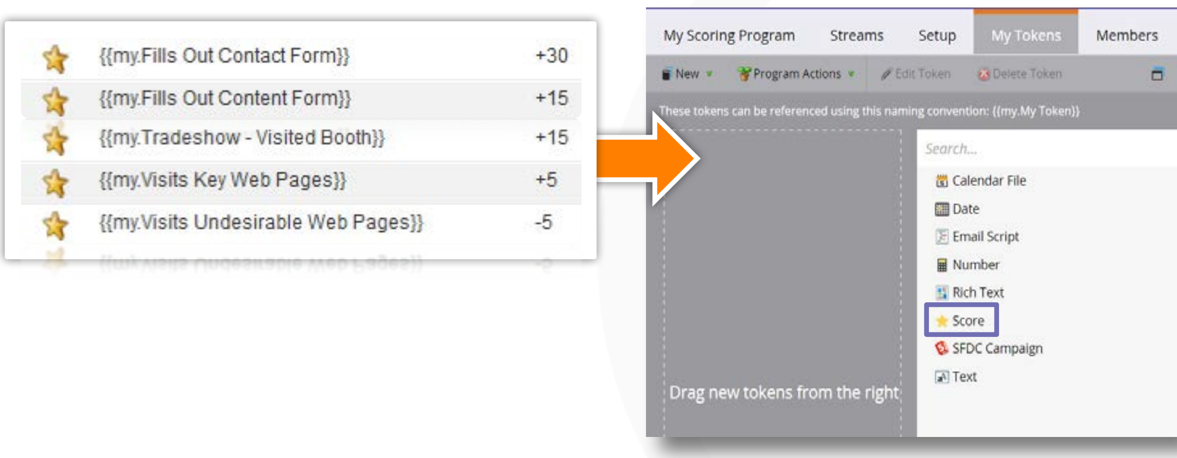
- Work with Sales to determine values, weight, and rank

Configuring Lead Scoring

- Marketing and sales should determine the criteria and values for scoring together
- Use both behavioral and demographic lead scoring to qualify leads
- Don't focus on Sales-ready leads only:
  - Identify leads for further nurturing
  - Disqualify leads that you don't need to market to

Using Tokens for Lead Scoring

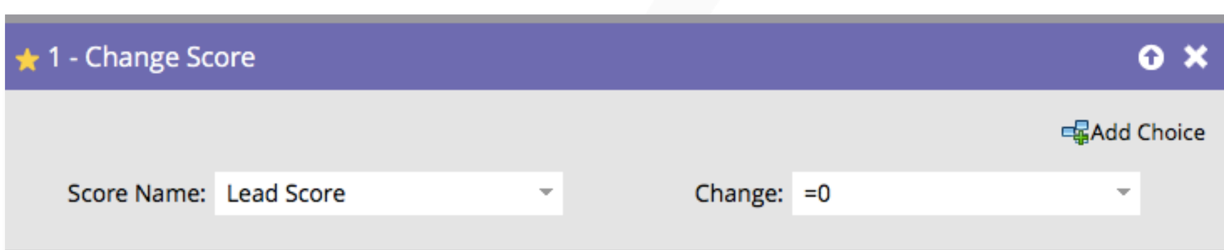
When setting up a lead scoring program, a program level score token should be used to set up scoring in the program. This allows you to have one view of all your score values, but also allows you to ensure that when a value needs to be changed, it gets uniformly updated.



Resetting a Score

Score fields are unique in that they are the only type of fields that allow for math to be done on them. Because of this, you can increment a score, subtract from a score, or set it equal to a value.

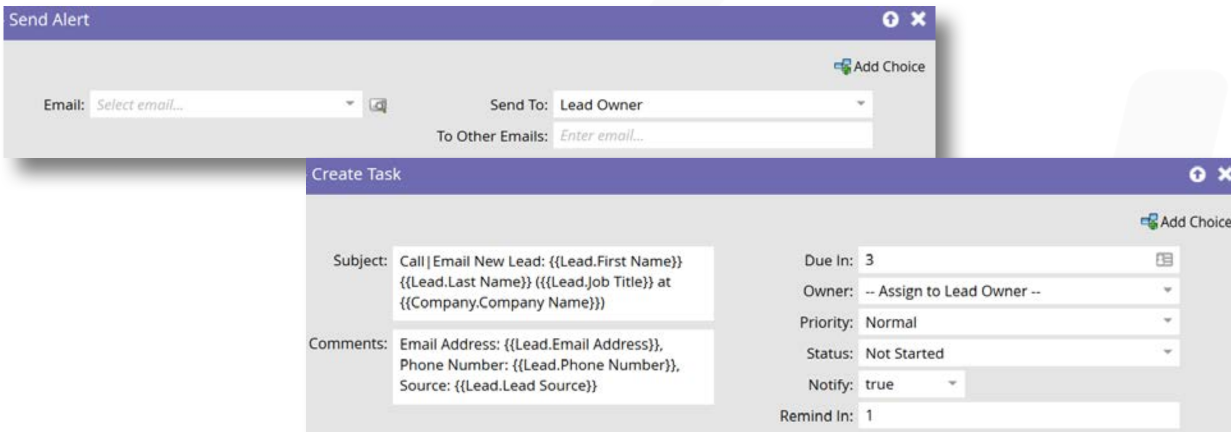
Scores are updated in a flow step of a campaign, using the Change Score flow step.



Communicating a Sales Ready Lead with Sales

When Marketing has an SLA with Sales, this can be communicated in 2 ways:

- Alerts – sends an email to the lead owner or other emails
- Task – can be configured if an integration with a CRM has been configured



Exam Prep Study Tips

- Review the Marketo Definitive Guide to Lead Scoring for more tips, tricks, and best practices when it comes to lead scoring
- Understand the use of program tokens in a lead scoring program
- Import and review the lead scoring program template from the Marketo program template library

Practice Questions

Q: Which situation is appropriate for resetting a customer's score to 0 according to Marketo's Lead Scoring Guide?

A. A customer clicks an email and visits a site but has not purchased yet.

B. A customer visits a site seven days in a row but has not purchased yet.

C. A customer places items in the cart and visits the checkout page but does not purchase for two days.

D. A customer purchased one year ago but has not visited a site in six months or opened an email in one year.

Practice Questions

Q: Who should provide the final approval of a scoring model's targeted buyer persona?

A. Sales

B. Marketing

C. Product manager

D. Chief executive officer

Practice Questions

Q: Which two Marketo features allow Marketing to pass information on a lead's behavior to a CRM system? (Choose two.)

A. Synched data fields

B. System smart lists

C. Marketo Sales Insight

D. Segmentation membership

E. Lead performance report

Practice Questions

Q: Which two company stakeholders should be included in the process when creating a scoring plan? (Choose two.)

A. Sales

B. Marketing

C. Product manager

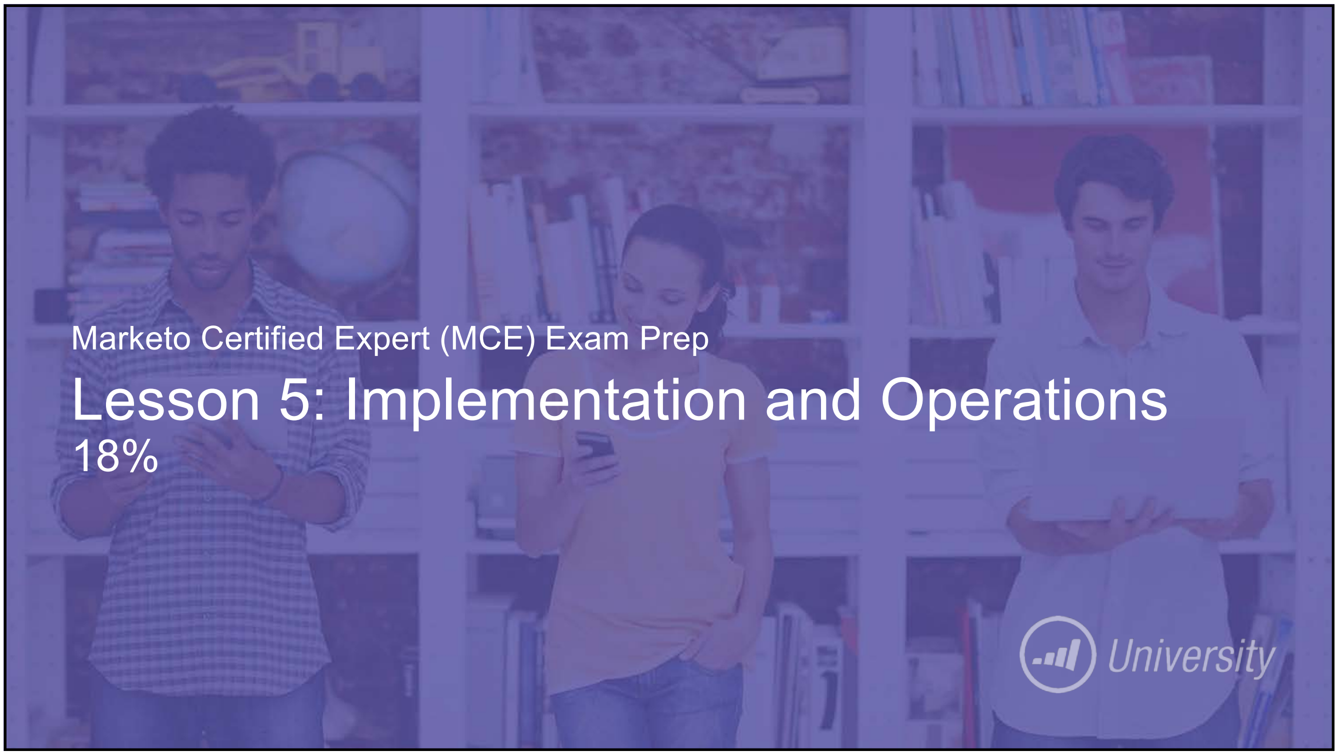
D. Chief executive officer

E. Research and development

F. Finance

Additional Study Aids

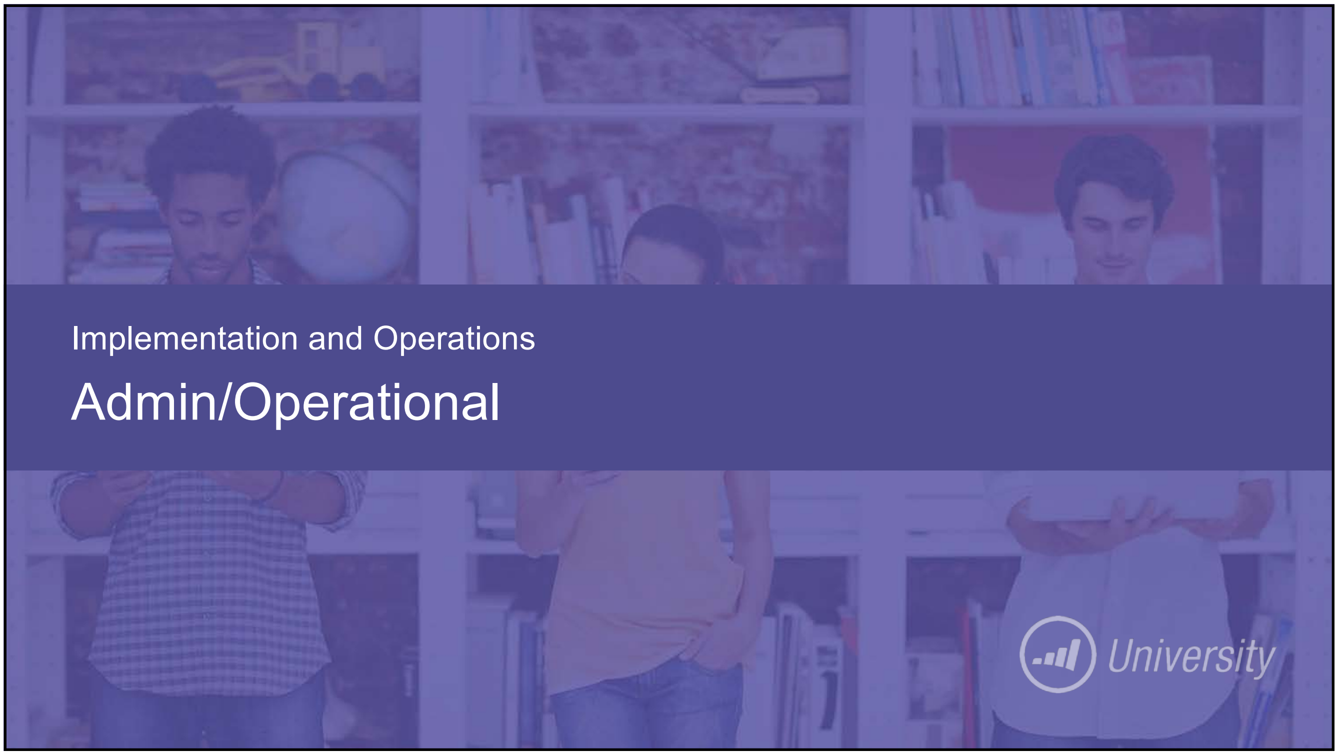
- Definitive Guide to Lead Scoring
- Simple Scoring
- Change Score
- Using the Lead Detail Page



What We'll Review

Best practice strategies for Implementation and Operations including:

- How to manage Marketo from an administrative perspective
- Understanding the difference between an operational email and a non-operational email
- Differences between local and global assets
- Marketo forms, progressive profiling, field types, thank you pages
- How leads are acquired by programs
- Hard bounce vs. soft bounce
- Marketing suspended use cases
- Munchkin code
- Data standardization



What Differentiates Marketo from an Email Service Provider?

FEATURE COMPARISION

	Email Service Provider	Marketing Automation
Sends Mass Emails	YES	YES
Tracks Open Rates and Clicks	YES	YES
Easy to Build Landing Pages	—	YES
Easy to Build Web Forms	—	YES
Easy to Create Multi-Step Campaigns	—	YES
Integrates with all Direct Mail, Social Media, and More	—	YES
Data Deduplication and Normalization	—	YES
Scores leads	—	YES
Recycles and Nurtures Leads	—	YES
Ensures only Qualified Leads go to Sales	—	YES
Measures the impact on Marketing initiatives on Revenue	—	YES
Monitors Website Actions	—	YES
Provides the IP Addresses and Company Names Associated with Anonymous Website Traffic	—	YES
Integrates with Data Directories to Fill in Missing Contact Info	—	YES

Identify a sender's legal requirements for opting in and unsubscribing when sending to international prospects.

A company with international prospects is bound to the legal requirements for opting in and unsubscribing of the country they are *sending to*.

United States - "CAN-SPAM Act"

Direct marketing email messages may be sent to anyone, without permission, until the recipient explicitly requests that they cease (opt-out).

Europe - "EU Opt-In Directive"

Direct marketing email messages may be sent only to recipients who have given their prior consent (opt-in). Prior permission is required for business-to-consumer (B2C) communication covering all "natural persons".

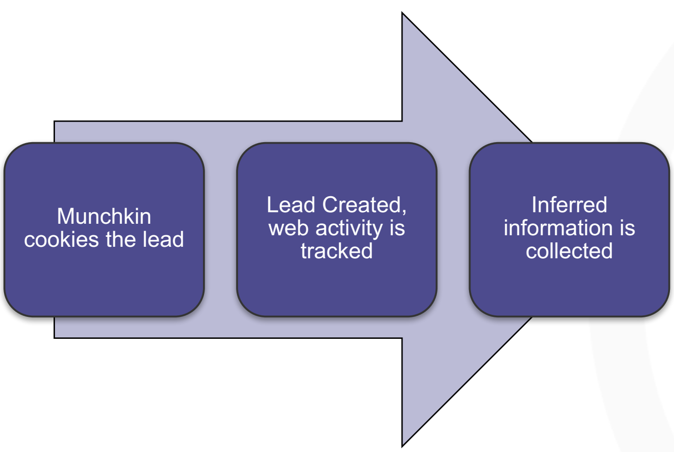
For business-to-business communication (B2B), i.e. "legal persons", EU member states are free to make opt-out the minimum legislation. However, national legislation of member states can require opt-in for B2B email communication too.

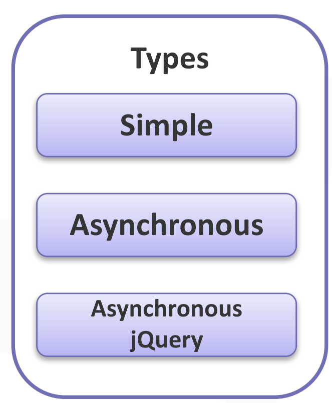
Canada - "CASL - Canada's Anti-Spam Legislation"

Commercial electronic messages may be sent only to recipients who have given their prior consent (opt-in). All recipients' express, or in certain cases implied, prior permission is required.

Munchkin Code and Anonymous Leads

Munchkin is the JavaScript snippet you put on your website. It tracks visits, clicks and form fill outs. It also has a rich API to do all sorts of neat tricks.

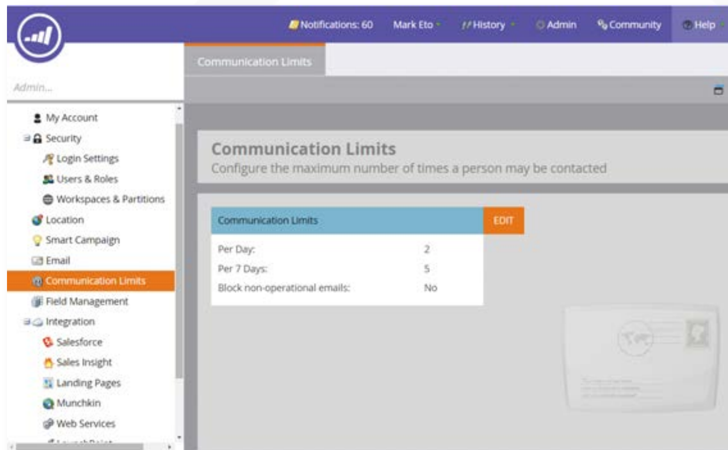




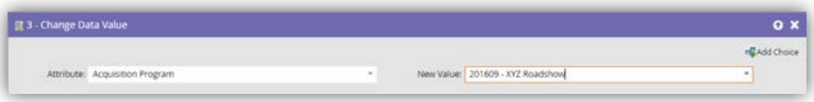
Communication Limits

What are the appropriate settings required to limit the amount of emails a lead receives?

- Default system limits are 2 per day and 5 per 7 days. The settings on this page control communication limits for your entire Marketo instance, including all programs and campaigns
- Nurture programs and email program sends automatically adhere to this rule



Program Acquisition

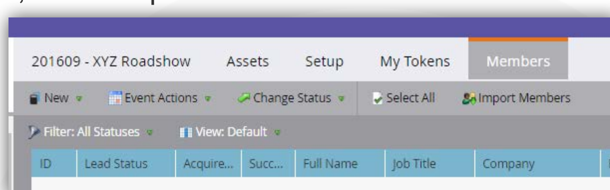


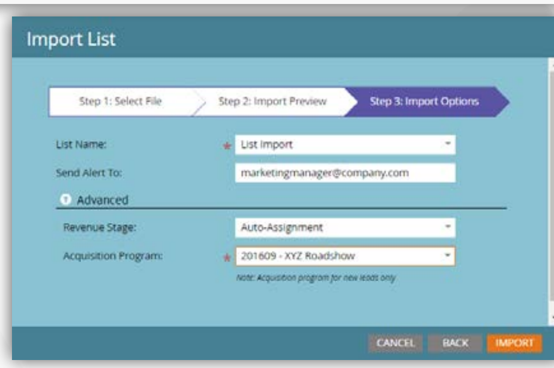
If a person is created as a member of a program, and that person is new to the Marketo database, the program automatically receives credit for **acquisition**.

This is most easily achieved by creating **local** assets in each program.

Additional ways to assign program acquisition:

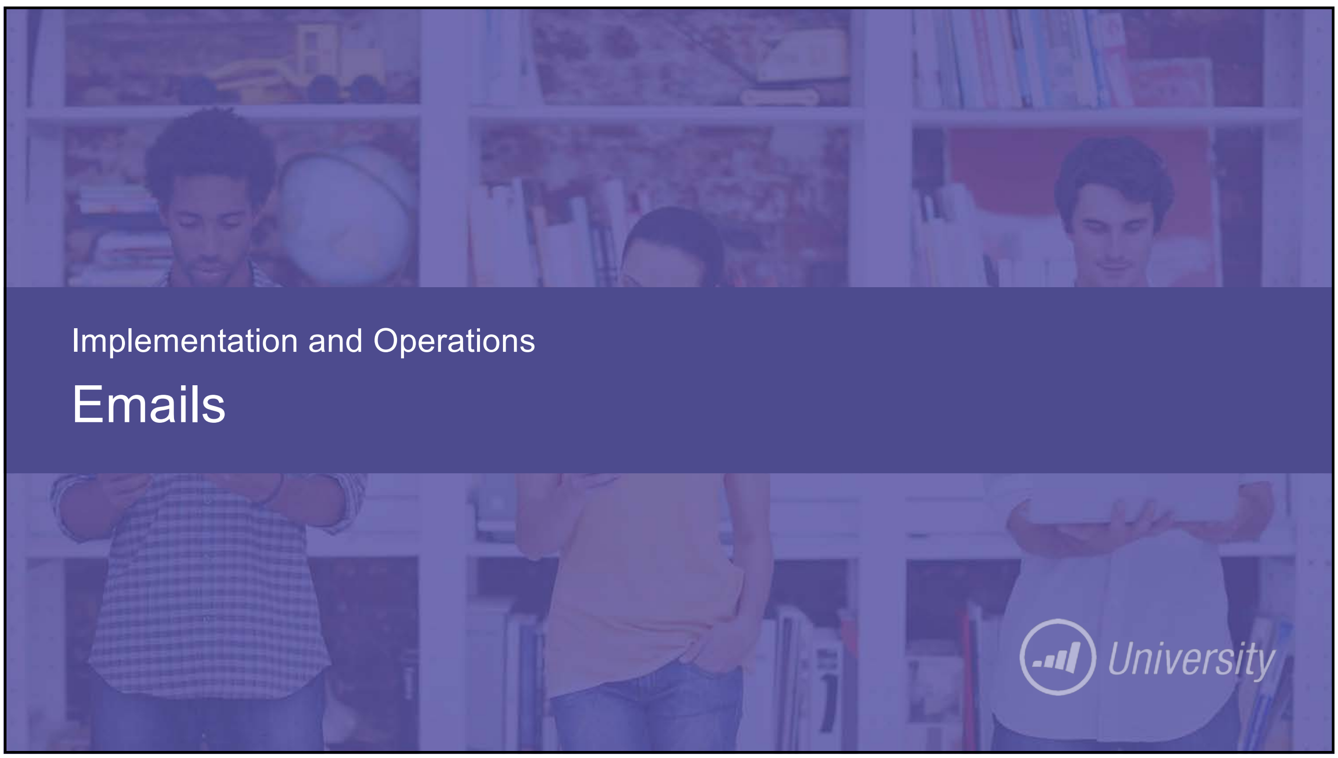
- Enter the acquisition program during list import
- Set the acquisition program manually via “change data value” flow step
- Import members into the program from the Members tab





Standardizing Data

- Standardize on data values
- Use the operational channel to create data management programs
- Examples
  - Blacklist competitors
  - Country clean-up
  - State clean-up
  - Manage email invalids
  - Marketing suspended
  - Duplicate lead alerts



In What Scenario Is an Unsubscribe Link not Needed?

What does the "operational" setting do?

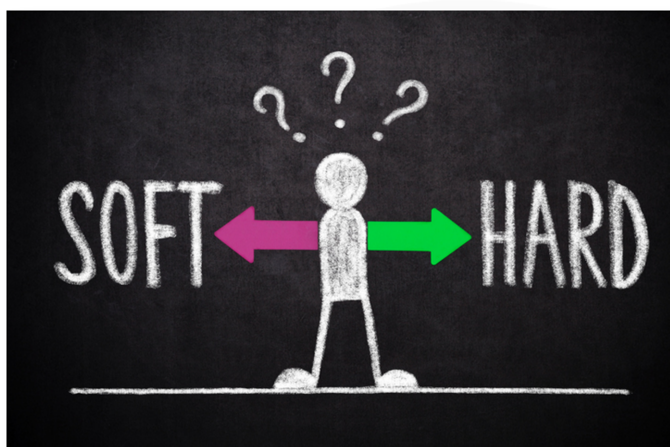
- No unsubscribe link automatically added
- Sent to leads set unsubscribed
- Sent to leads set marketing suspended

When is it OK to use the operational setting?

- Transactional messages
  - Receipts for purchases
  - Registration confirmations
  - Download links in response to form fill-outs
  - Requested assets (whitepapers, spec sheets, and so forth)
- Should not contain any marketing content at all

Soft Bounce vs. Hard Bounce

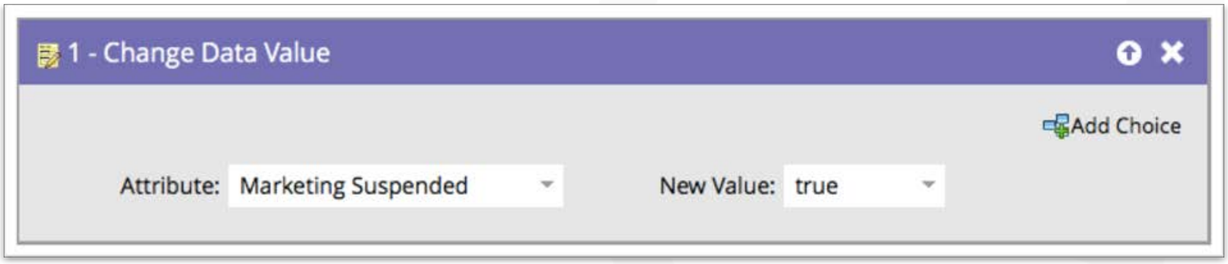
- A soft bounce is a temporary problem with email deliverability, usually due to an unavailable server or a full inbox
- A hard bounce is a permanent failure to deliver an email, usually a result of an email address being non-existent, invalid, or blocked



What Is the Use Case for Marketing Suspend?

To Pause marketing for a variety of reasons such as:

- Engagement with sales
- New customers
- Closed lost opportunities
- Holiday timeframes



Design for Delivery: Content Design

Content-wise filters evaluate:

- Key words
  - Repeated use of key words
  - Capitalization and punctuation
- Spelling errors
- Link reputation
- Image to text ratio

Don't use **URL shorteners!**

Implementation and Operations

Forms

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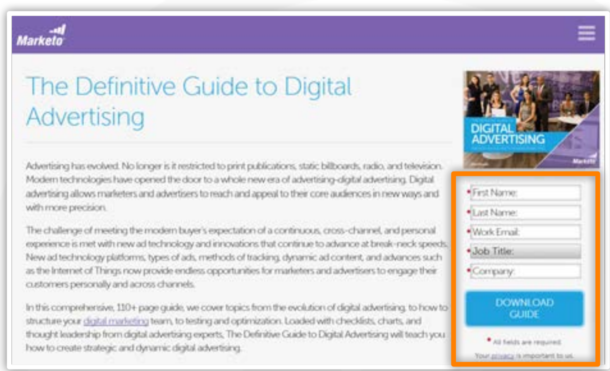
Benefits of Using Marketo Forms on Your Marketo Landing Pages

- Highest degree of success in data capture
- Minimize duplication of leads in your database
- Advanced nurturing: hidden fields provide insight on your leads
- Easier to modify and produce
- Pre-populating forms can lead to higher conversion rates



Form Properties (1 of 2)

Click a field to view its properties on the right side of the screen.

Property	Description
Label	How you define the name of the field
Rich Text	Can also be used here for custom label or to hyperlink the label.
Field	What the field maps to in Marketo.
Field Type	Different ways to define user input.
Label Width	Changes the width of the label. Can also be changed by dragging the right hand side of the box.
Field Width	Changes the width of the field . Can also be changed by dragging the right hand side of the box.
Instructions	Creates a message when users hover over the field to give them more info about what you are asking them to input. Works as a tool tip when hovered over.
Hint Text	Adds text into the field that disappears when the user starts typing. This is a great way to save space in your form as it can be used to tell users what to enter and you can remove the field labels.
Default Value	Pre-fill the field with a selection. Users can change it but if they don't this information will be submitted with the form.

Form Properties (2 of 2)

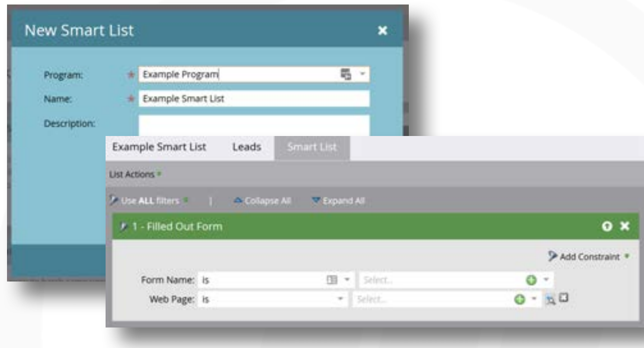
Click a field to view its properties on the right side of the screen.

Property	Description
Max Length	This property appears when Field Type is Text. It is used to set the maximum number of characters a user can enter.
Multiple Selections	This property appears when Field Type is Select. It lets you make multiple choices in a drop down list.
Behavior	When clicked on a field, field behavior can be seen on the bottom right corner of the screen. Is Required: Check the box to make the field required. A red asterisk appears by the field when this is checked. It also bolds the field label. Users will not be able to submit the form unless these fields are complete.
Visibility Rules	Control whether or not a field appears based on selection from another field. Example: Only have selection of U.S States appear if the country USA has been previously selected
Form Pre-fill	Automatically populates the fields to speed up the form fill out process for your customers. It toggles on a field by field basis. This can result in a higher conversion rate. It pulls the data from Marketo's lead database. For security reasons, it does not work on forms that are added pages out of Marketo's domain.
Mask Input	It appears only when the Field Type is Text. It is used for standardizing the input format. (Ex: (999)-999-9999 for telephone numbers)

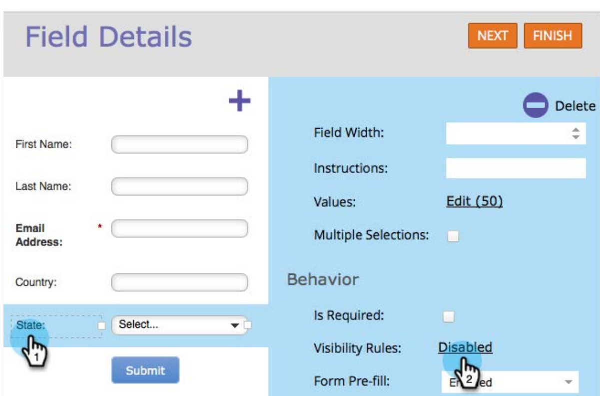
Where Is Form Fill Information Located?

To find data that was obtained from a form submission, a smart list with a customized view would be the best place to look. To do this:

- Create a smart list
- Use the Filled Out Form filter
  - Select the form
  - Add the Web Page constraint
  - Select the specific page
- View the qualified leads under the Leads tab
- Customize your view to include the fields that are present on your form



Dynamically Toggle Visibility of a Form Field

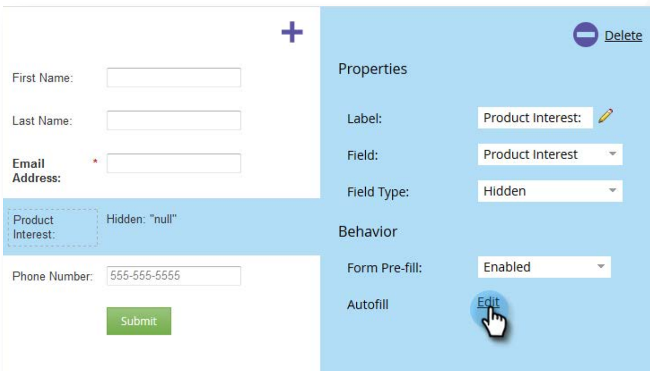


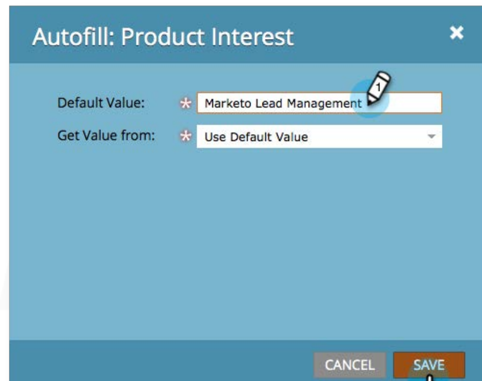
- Select to Show IF Country is US and specify US state values
- Select to Show IF Country is CA and specify Canadian province values
- Select to Hide IF Country is not CA or US

Hidden Form Fields

Hidden fields are usually populated dynamically. They are not shown to the person filling out the form.

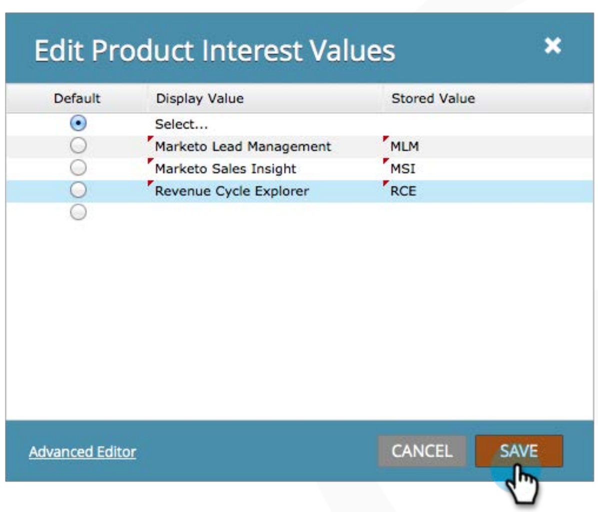
- Default Value
- URL Parameter
- Cookie Value
- Referrer Parameter



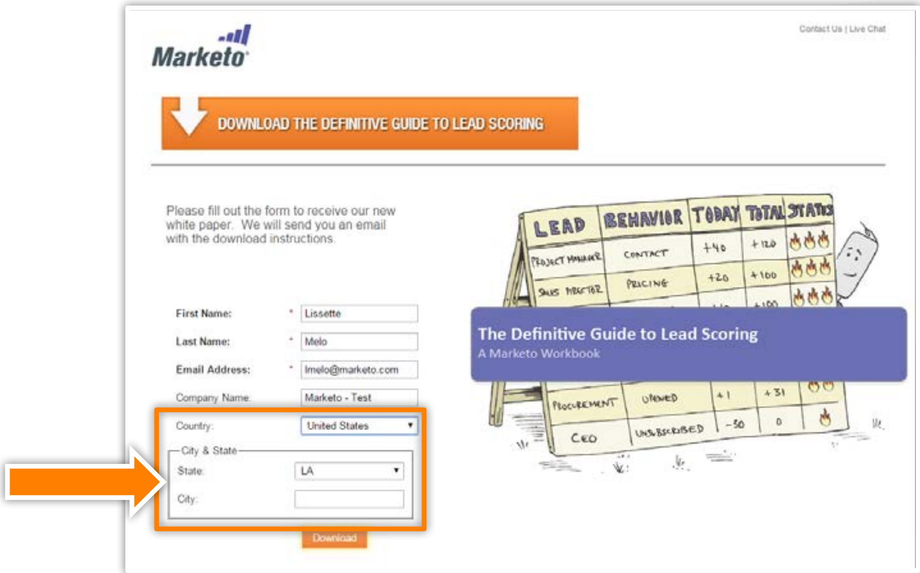


Forms Radio or Selected Field in a Form

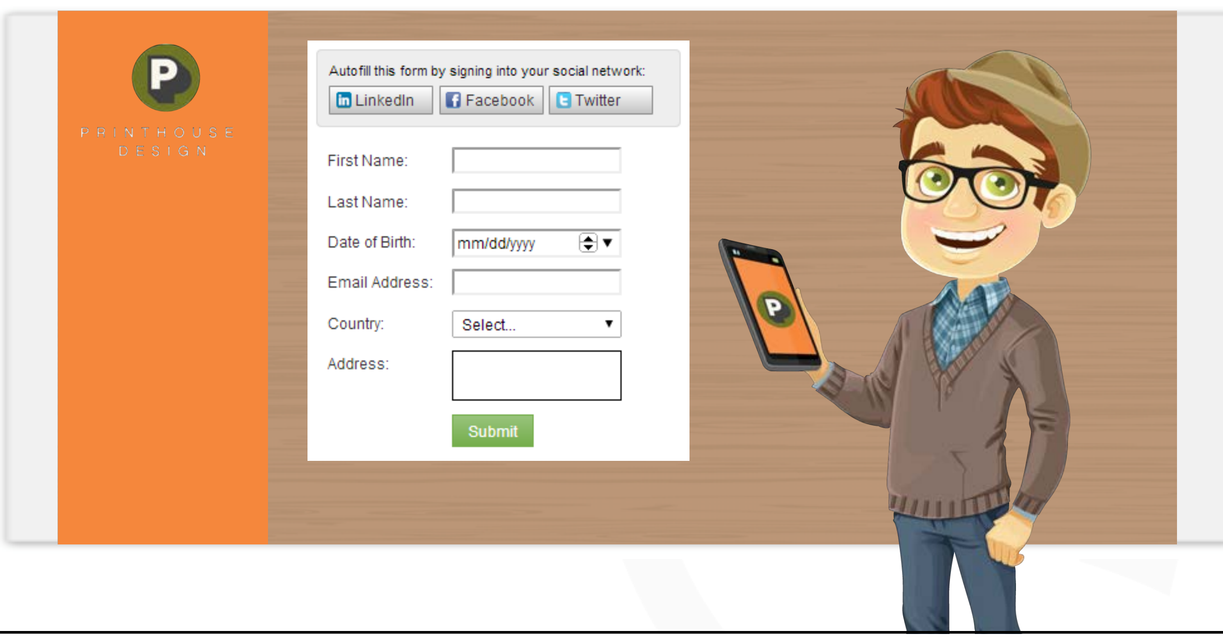
Define the display value and the Marketo stored value



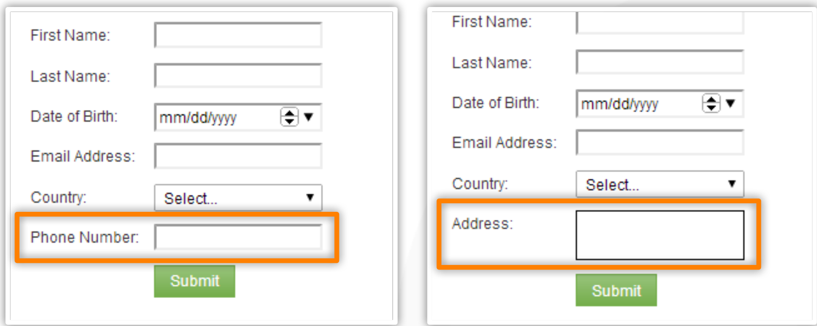
Creating a Fieldset



Progressive Profiling



Progressive Profiling

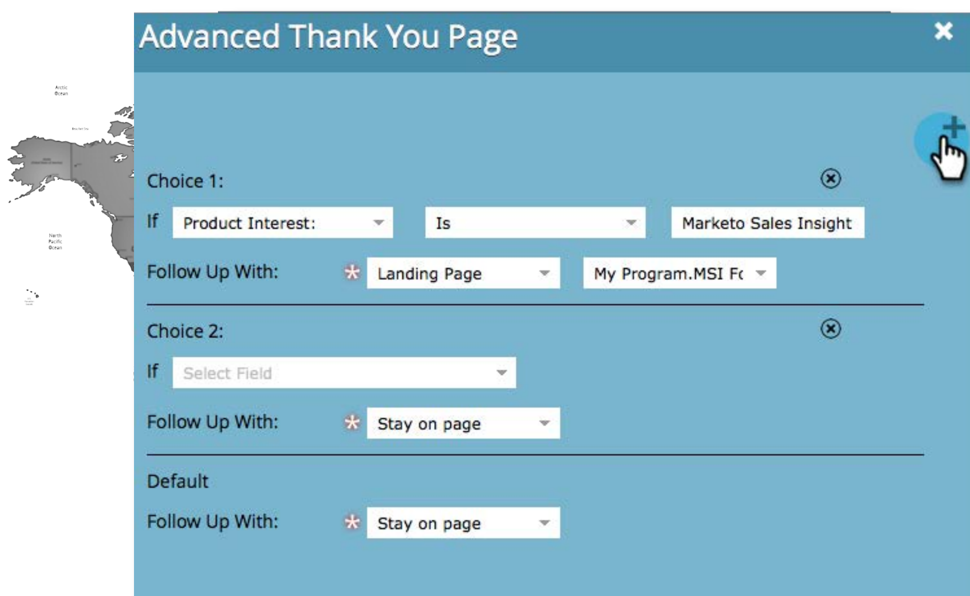


1st visit

2nd visit

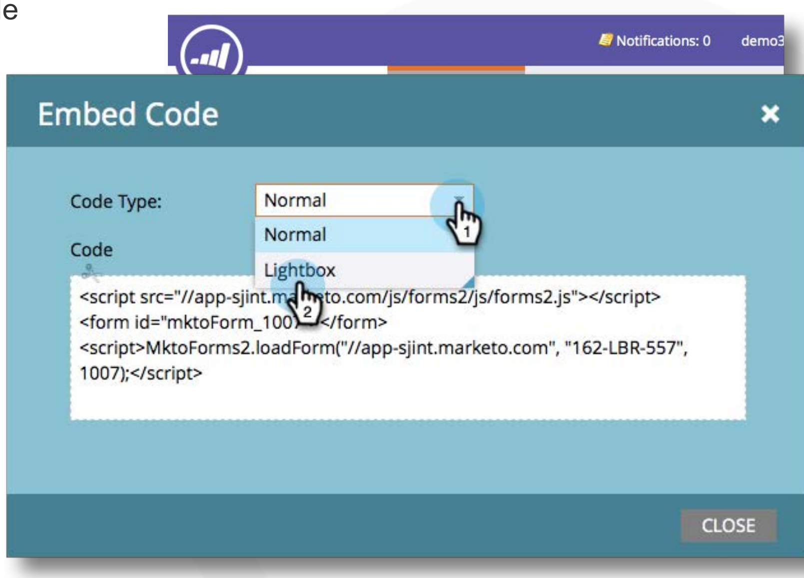
Example of progressive profiling, comparing a person's 1st and 2nd visit to a site

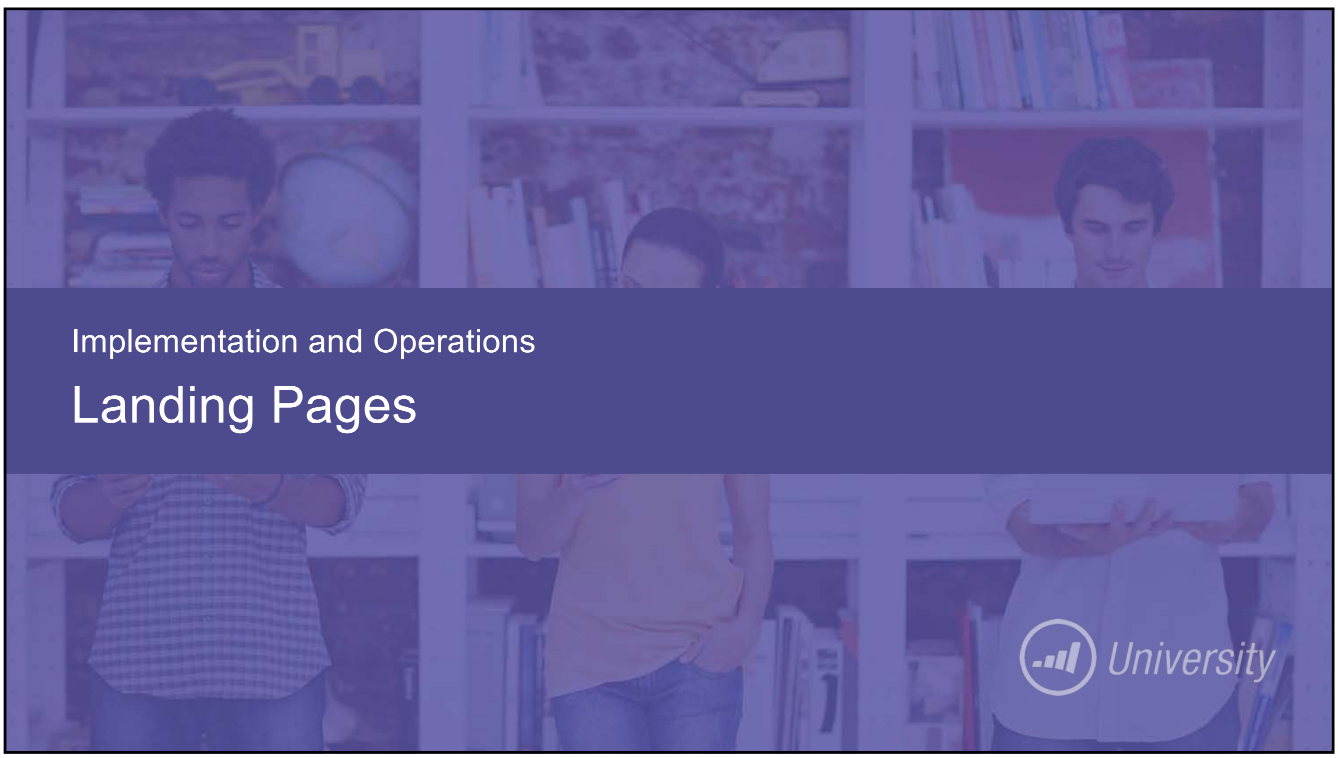
Form Dynamic Thank You Pages



Forms

Normal and Lightbox embed code





Landing Pages

Local

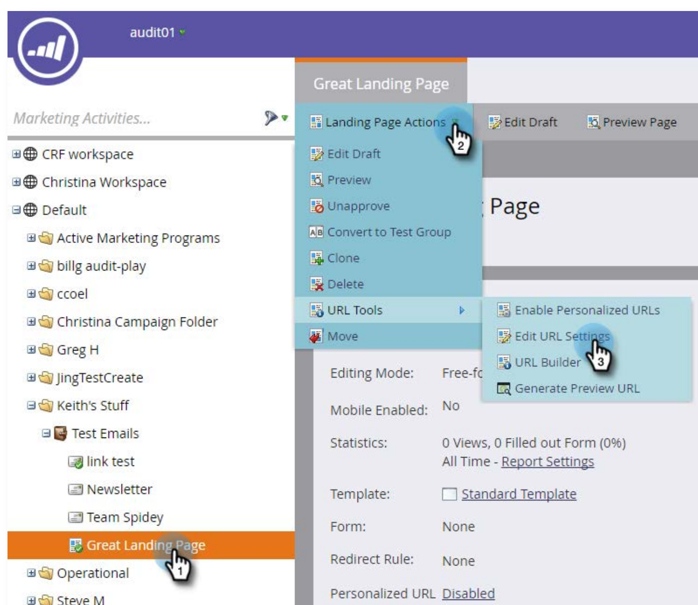
- Lives in program in Marketing Activities
- Program membership is automatic
- Acquisition program is automatic

Global

- Lives in Design Studio
- Program membership is NOT automatic
- Acquisition is NOT automatic

Landing Pages

- You can modify a landing page's URL
- This can help make the URL easier to remember, and improve SEO



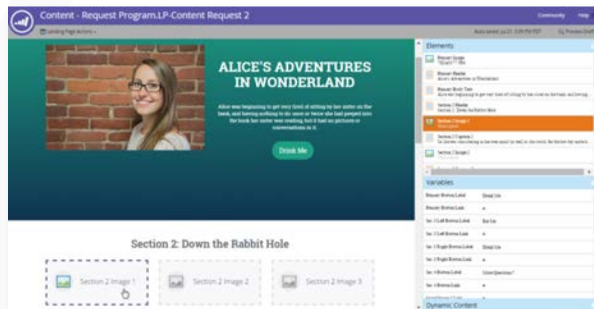
Types of Landing Page Templates

Free-form landing pages

- Use system templates
- Change HTML properties
- Embed custom HTML
- Add meta tags

Guided landing pages

- Use system templates
- Add elements
- Change variables



Implementation and Operations

Tips, Additional Resources, and Practice Questions

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Exam Prep Study Tips

- Revisit all of the different editors, focusing on options available. Just because you don't use it, doesn't mean its not important. Be sure to check out:
  - Field-level settings on forms
  - Various elements you can add to a landing page
  - SEO settings
  - HTML and text versions of emails
  - Marketing calendar functions
- Review the Admin area, considering ways that you can customize the configuration of your instance

Practice Questions

Q: An organization wants to prevent over-emailing leads.

A. Audit trail

B. Remove from flow

C. Email admin settings

D. Communication limits

Practice Questions

Q: How does a marketer ensure compliance with international SPAM laws?

A. Use a dedicated IP address

B. Implement a double opt-in process

C. Leverage the Email Deliverability tool

D. Configure branded links for international leads

Practice Questions

Q: It is required that U.S. states be entered as a 2-digit abbreviation, but you want to display full state names in the form picklists. Which forms editor feature should you use?

A. Enabling Mask Input in the field settings

B. Enabling Form Pre-fill in the form settings

C. Using Progressive Profiling in the form settings

D. Using a different value for Stored Value in the field settings

Practice Questions

Q: What should be included in an email to help ensure deliverability?

A. Images

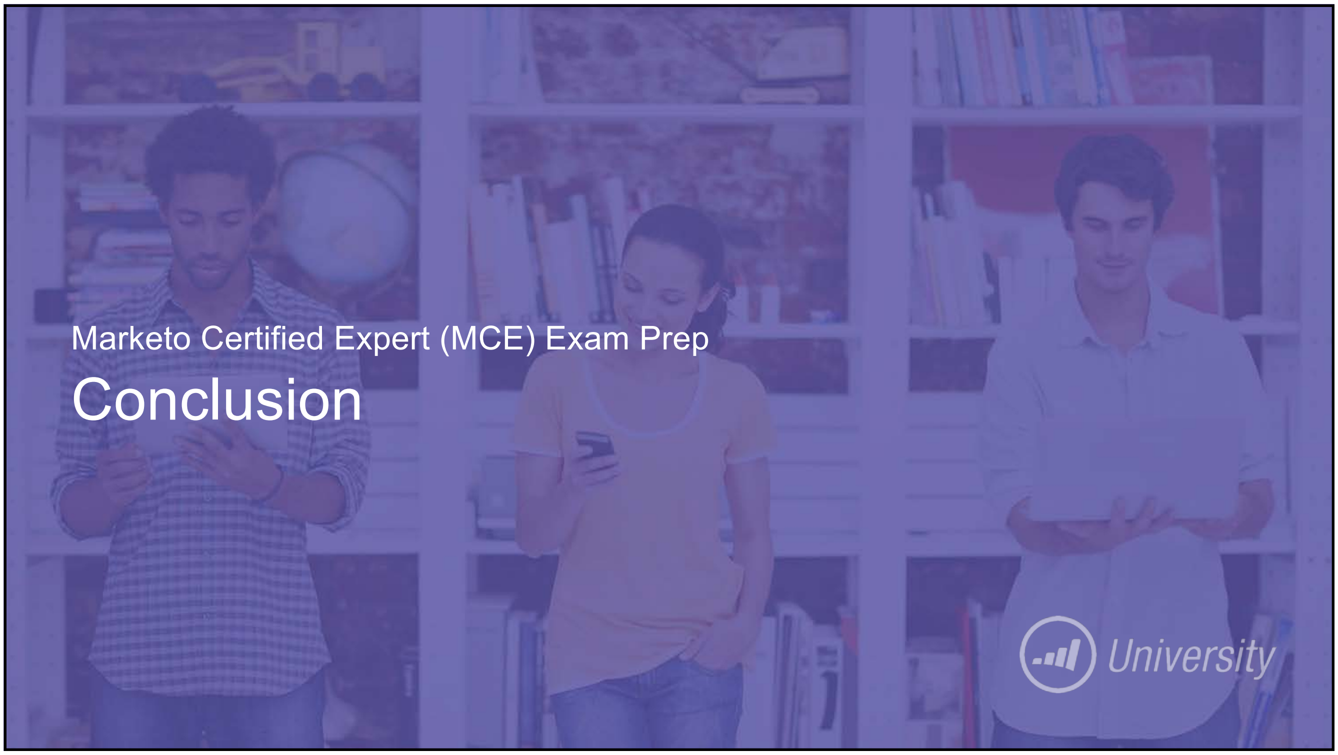
B. JavaScript

C. Text version

D. Landing page links

Additional Study Aids

- The Definitive Guide to Marketing Automation
- Blog Email Marketing vs. Marketing Automation – Marketo
- Email Setup Admin
- Add Munchkin Tracking Code to Your Website
- Email Deliverability Cheat Sheet
- Enable Communication Limits
- Understanding Unsubscribe
- Understanding Email Event Logging
- Make an Email Operational
- Forms
  - Define Values in a Radio or Selected Field in a Form
  - Use a Form in a Lightbox
  - Embed a Form on Your Website
  - Set a Hidden Form Field Value
  - Dynamically Toggle Visibility of a Form Field
  - Show Custom HTML Form for Known Leads
- Hard and Soft Bounces in Email
- Understanding Local Assets in a Program



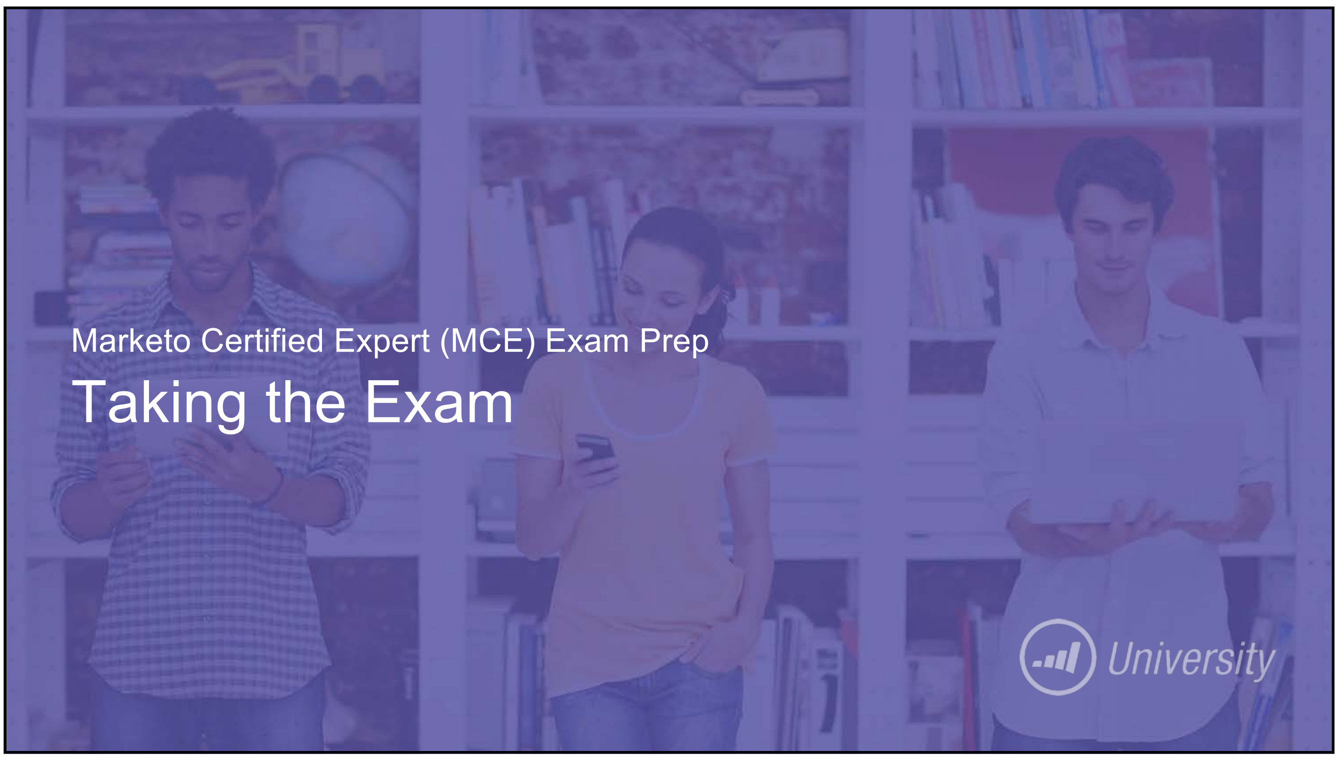
What We Covered

- Marketo Program Fundamentals
- Identifying best practices for Targeting and Personalization
- Identify different types of Reporting and best use cases
- Understanding the concepts of Lead Management
- Best practice strategies for Implementation and Operations

Next Steps

Now that you have taken the course, you may want to take the next steps in achieving your Marketo Certified Expert status.

- Review materials and study tips
- Review community and help documentation around the exam topics
- Schedule your exam



Overcoming Test Anxiety

General preparation

- Develop good study habits and strategies
- Manage your time (dealing with procrastination, distractions, laziness)
- Approach the exam with confidence
- Be prepared: use a checklist

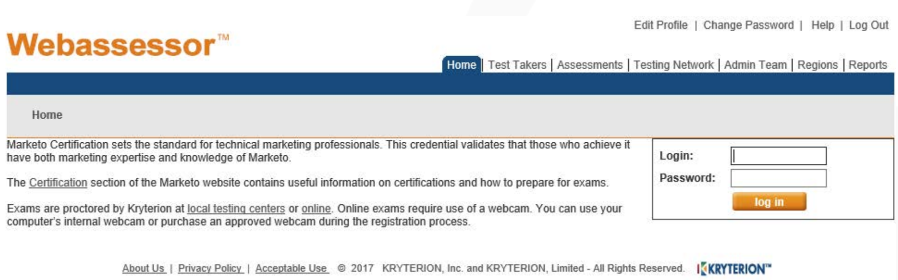
Most students experience some level of anxiety during an exam

Register for the Exam

Two testing models

1. Online Proctored—test at home or work
2. Onsite Proctored—traditional test center

For both, go to: www.webassessor.com/marketo



Registration Assistance: certification@marketo.com

Taking the Exam: Online Proctored

Testing on any computer with reliable internet that meets the Kryterion system requirements.

Process:

- Go to www.webassessor.com/marketo
- Choose Marketo Certified Expert
- Choose Online Proctored
- Choose Date and Time
- At Checkout, enter promotion code

Before Your Test:

- Verify technical requirements, including internal and/or external webcam
- Install Sentinel Security Application

Take Your Test:

- Disable all potential alerts (updates, email, ant-virus)
- Log into Webassessor to launch your test

If you have any feedback, we'd love to hear back about it.

https://marketo.co1.qualtrics.com/SE/?SID=SV_8vpNgeQUcUmgiu9

Thank you!

Check out more at Marketo University

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http://learn.marketo.com