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Marketo Certification Exam Prep

# Preparing for your MCE Study Group



# Benefits of a Marketo Certified Expert Study Group

- ✓ Procrastination Solution
- ✓ Learn Faster
- ✓ Get New Perspectives
- ✓ Break the Monotony



# Forming a Successful Marketo Certification Study Group



## 1. Forming the group

- The group leader must be MCE certified.
- Time Commitment:
  - 5-6 weeks
  - One meeting per week
  - 1-2 hours per session

## 2. Preparing for the sessions

- Host meetings via conference call and/or in person weekly

# Leading an MCE Self Study Group

- **Group Purpose**
  - This Self Study Group Kit is designed to help students prepare for the MCE not train individuals on Marketo.
- **Study Group Materials**
  - Self Study Guide 2018
  - Exam Detailed Topic List
  - MCE Study Kit



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# Self Study Guide 2018



# Prerequisites

This course is intended for Marketing Operation professionals, Marketing Automations professionals and Marketing Practitioners.

## 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)
- Has conceptual knowledge and the business context of using Marketing Automation

# The Exam

- 80 Multiple Choice Questions
- 90 minutes allotted
- Section Weighting
  - Program Fundamentals 30%
  - Targeting and Personalization 16%
  - Analytics and Reporting 16%
  - Lead Management 20%
  - Implementation and Operations 18%



# Exam Preparation Resources

Marketo University Learning Portal

- MCE Exam Prep Course Schedule

- Learning Passport

MCE Exam Blueprint

Marketo Docs

Sample Questions





# About the Exam Detailed Topic List

- The purpose of the exam blueprint is to provide you with a roadmap of the Marketo Certified Expert exam content to allow you to better prepare for the exam.
- The blueprint includes test domain weighting, test objectives, and topical content. The topics and concepts are included to clarify the test objectives.
- The MCE exam blueprint provides exam strategy at-a-glance.



# Marketo Certification Exam Prep

## Exam Topic Areas

- Program Fundamentals
- Targeting and Personalization
- Analytics and Reporting
- Lead Management
- Implementation and Operations



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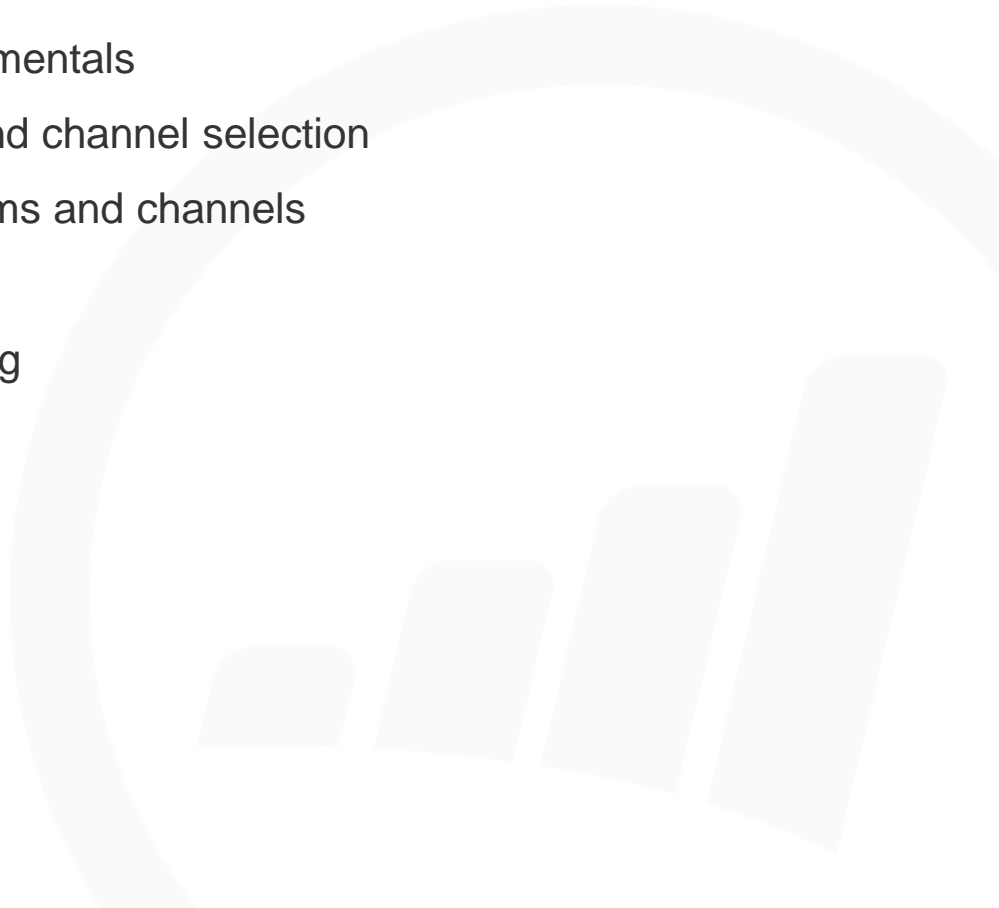
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# Program Fundamentals

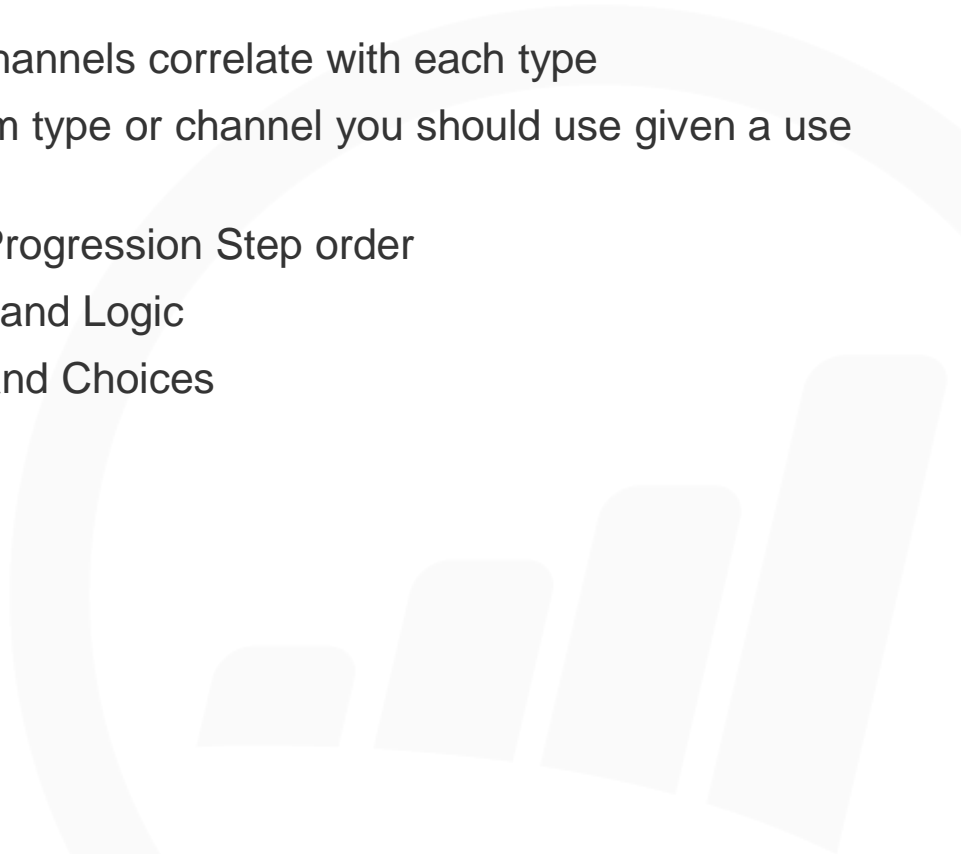
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# Objectives

- Understanding 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
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- A decorative background graphic on the right side of the slide. It features a large, light gray arc that curves from the top right towards the bottom left. Below this arc, there are four vertical bars of increasing height from left to right, resembling a bar chart. The bars are also light gray and have a slight 3D effect with shadows.

# 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
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# Practice Questions

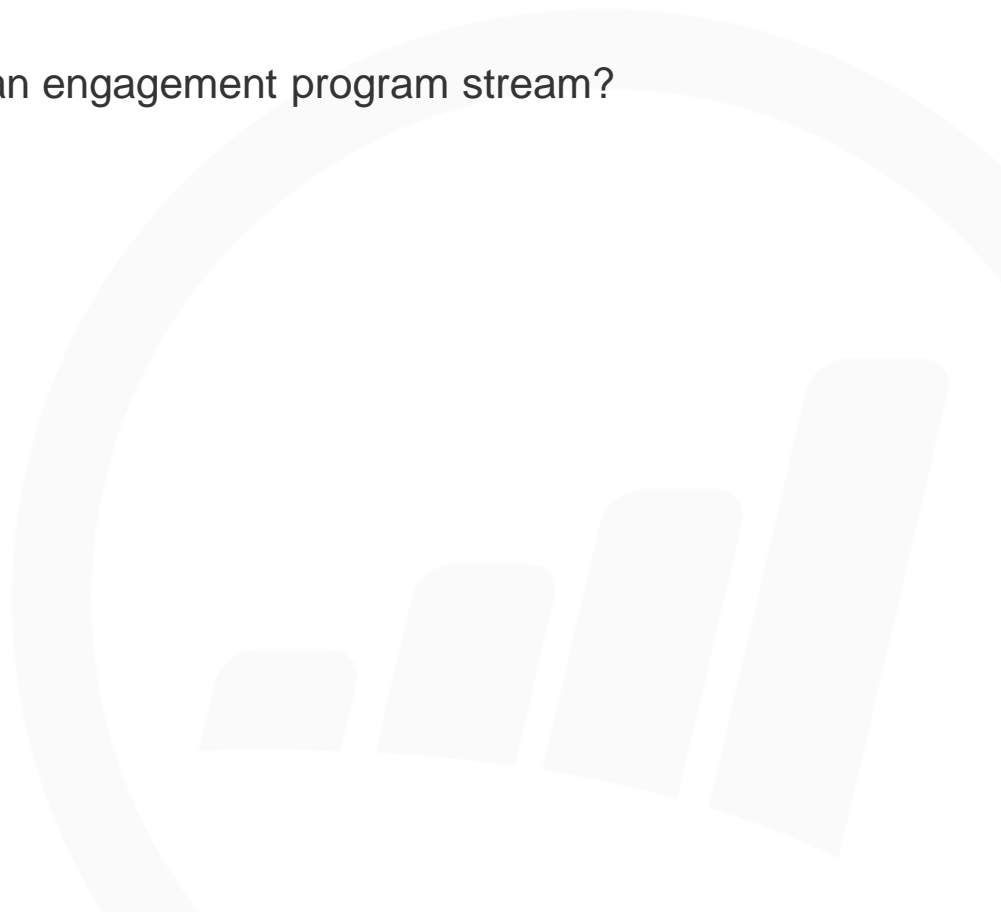
**Q:** You need to mark individuals as attended as they show up to your customer appreciation dinner. Which channel and program type should you use?

- 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:** 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 and
- 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](#)

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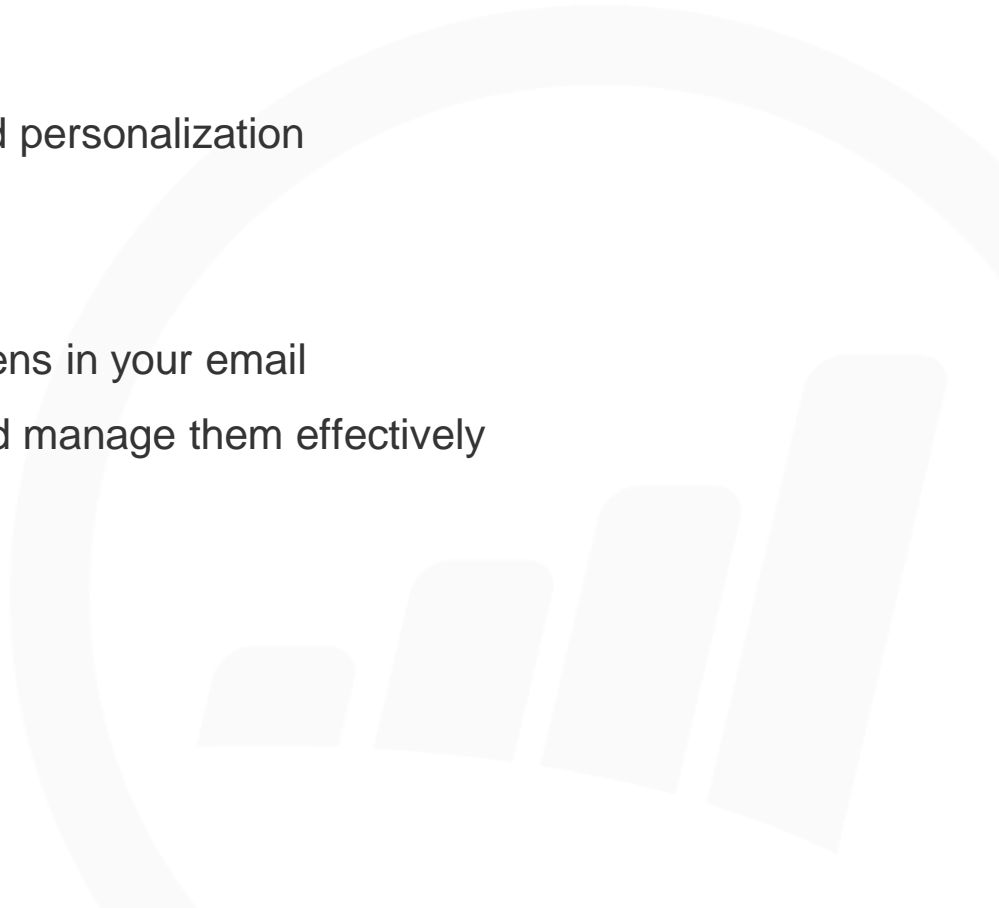
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# Targeting and Personalization

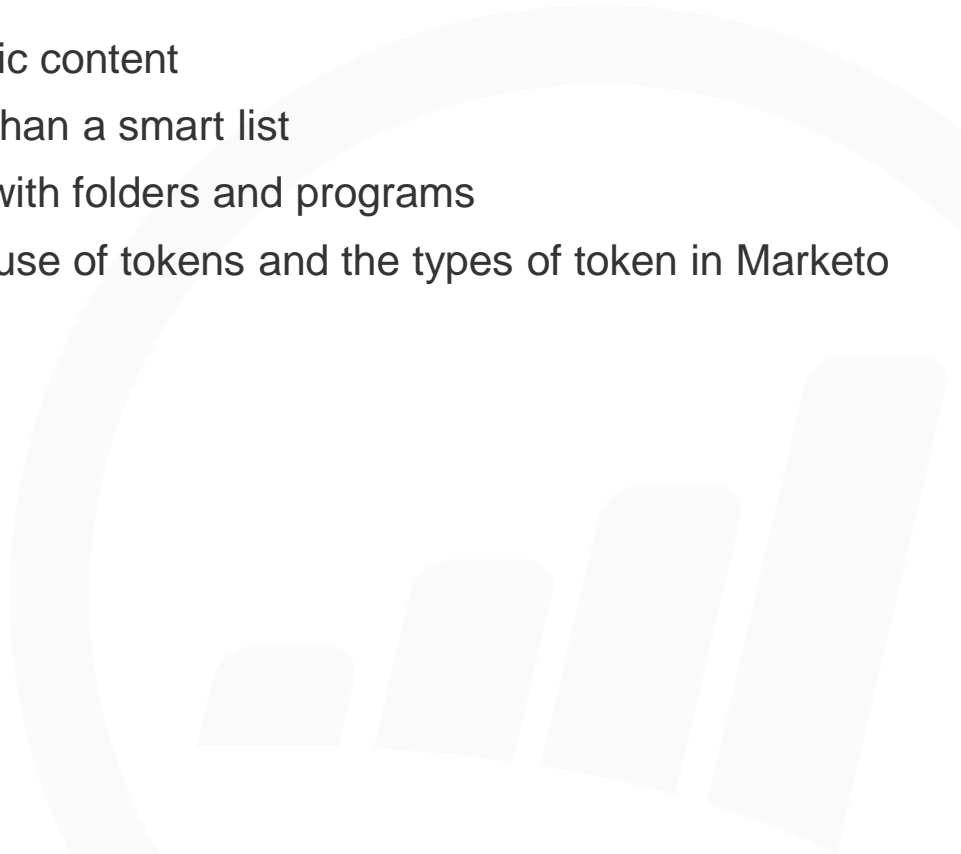
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# Objectives

- Identify best practices for targeting and personalization
  - Understand dynamic content
  - Describe tokens and their use
  - Utilize personalization and system tokens in your email
  - Utilize MyTokens in your programs and manage them effectively
- 
- A decorative background graphic consisting of a large, light gray arc on the right side of the slide, and four vertical bars of increasing height from left to right, also in light gray, positioned below the arc.

# 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 token in Marketo
- 
- A decorative background graphic consisting of a large, light gray arc on the right side of the slide. Below this arc, there are four vertical bars of increasing height from left to right, also in a light gray color, creating a stylized bar chart effect.

# 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

The screenshot shows the 'Marketing Activities...' interface. On the left, a tree view shows the hierarchy: 'Testing for Testing Sake' (selected), 'Token Examples', 'BP-TS-YYYY-MM-DD Tradeshow', 'Campaigns', 'Local Assets', 'Emails', 'Reports', 'Zoetis Campaign Opt Out', and a list of users (Charlotte, Colby, Default, James, Jason). The main panel displays 'These tokens can be referenced using this naming convention: {{my.My Token}}'. It lists tokens categorized into 'Local (10 Tokens)', 'Overridden (1 Token)', and 'Inherited (3 Tokens)'. The 'Inherited' section shows tokens like {{my.Date}}, {{my.Headline}}, and {{my.Signature}}, all with values 'Double-Cli...' and update times from Jan 4, 2017.

T...	Token Name ▲	Value	Updated
Local (10 Tokens)			
	{{my.Email From Address}}	from.email...	Jan 4, 2017 7:13 PM
	{{my.Email From Name}}	My Email F...	Jan 4, 2017 7:13 PM
	{{my.Email Reply-to Address}}	replyto.em...	Jan 4, 2017 7:13 PM
	{{my.Event Booth #}}	My Booth ...	Jan 4, 2017 7:13 PM
	{{my.Event Date}}	MM-DD-YY...	Jan 4, 2017 7:13 PM
	{{my.Event Time}}	HH:MM A...	Jan 4, 2017 7:13 PM
	{{my.Event Title}}	Edit Event ...	Jan 4, 2017 7:13 PM
	{{my.Event Type}}	Trade Show	Jan 4, 2017 7:13 PM
	{{my.Follow-up Email Body - Visited B...	Double-Cli...	Jan 4, 2017 7:13 PM
	{{my.Invitation Email Body}}	Double-Cli...	Jan 4, 2017 7:13 PM
Overridden (1 Token)			
	{{my.Number}}	100	Jan 4, 2017 7:14 PM
Inherited (3 Tokens)			
	{{my.Date}}	Double-Cli...	Jan 4, 2017 7:12 PM
	{{my.Headline}}	Double-Cli...	Jan 4, 2017 7:12 PM
	{{my.Signature}}	Double-Cli...	Jan 4, 2017 7:14 PM

# 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.

# 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 a Email](#)
- [Best Practices for Smart Lists](#)
- [Tokens Overview](#)
  - [Understanding My Tokens in a Program](#)
  - [Use a Date Token in a Wait Flow Action](#)

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# Analytics and Reporting

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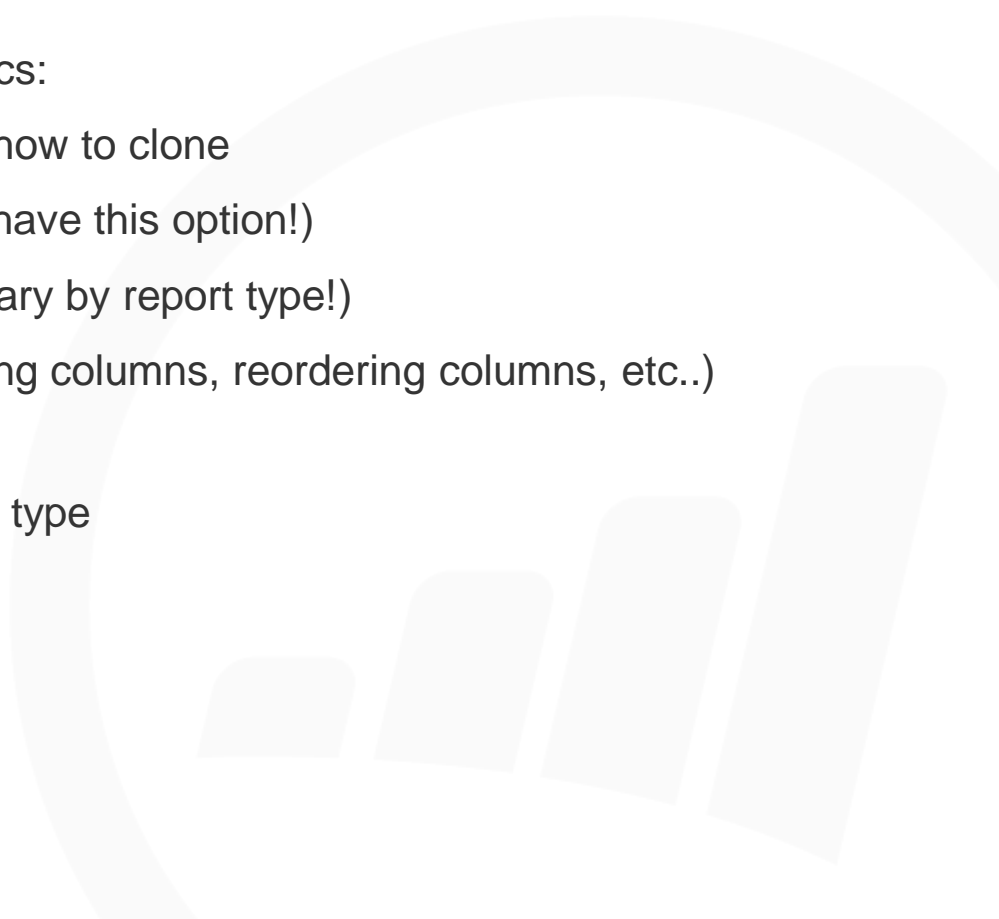


# Objectives

- Introduction to Analytics and Reporting
  - Identify types of reporting
  - Explain how to set up reporting
  - Identify best types of reporting by use case



# 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, etc..)
    - Subscription options
  - Consider why you might use each report type
- 
- A decorative background graphic consisting of a large, light gray arc on the right side of the slide, and a bar chart with four bars of increasing height (from left to right) positioned below the arc. The bars are also light gray.

# 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"

# 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](#)



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# Lead Management and Scoring

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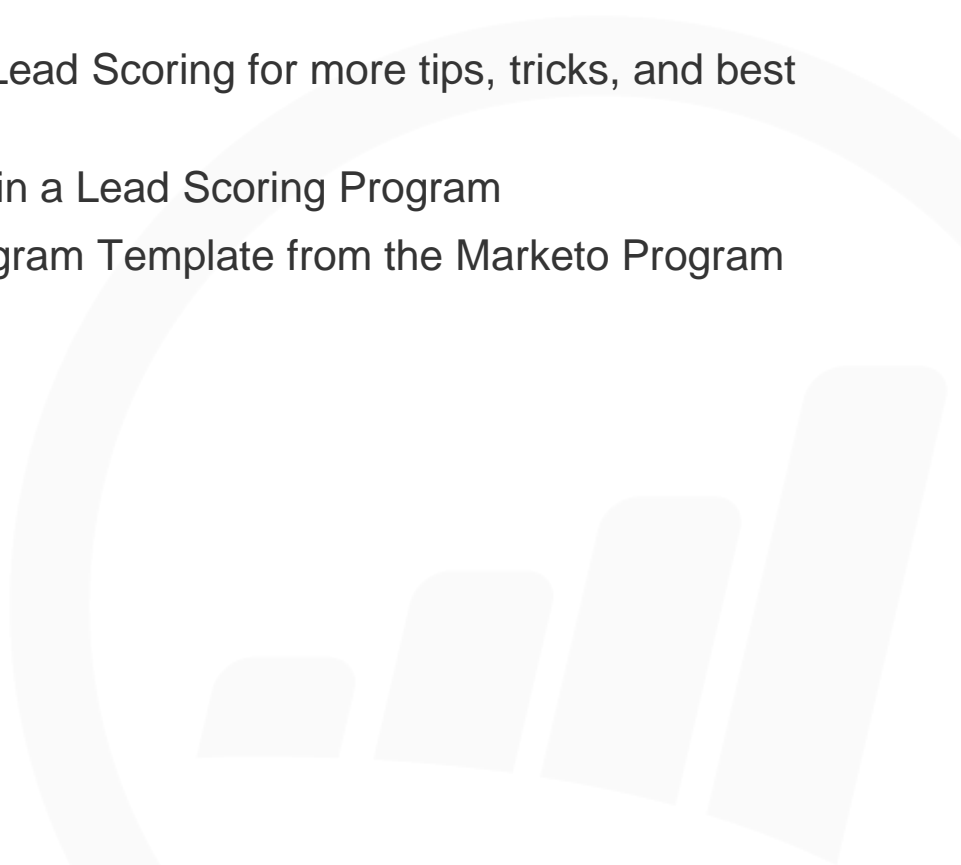


# Objectives

- Lead scoring best practices
- How to alert sales of sales ready leads
- Given a scenario of needing to reset a score, identify the appropriate value



# 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
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# 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.



# Additional Study Aids

- [Definitive Guide to Lead Scoring](#)
- [Simple Scoring](#)
- [Change Score](#)
- [Using the Lead Detail Page](#)



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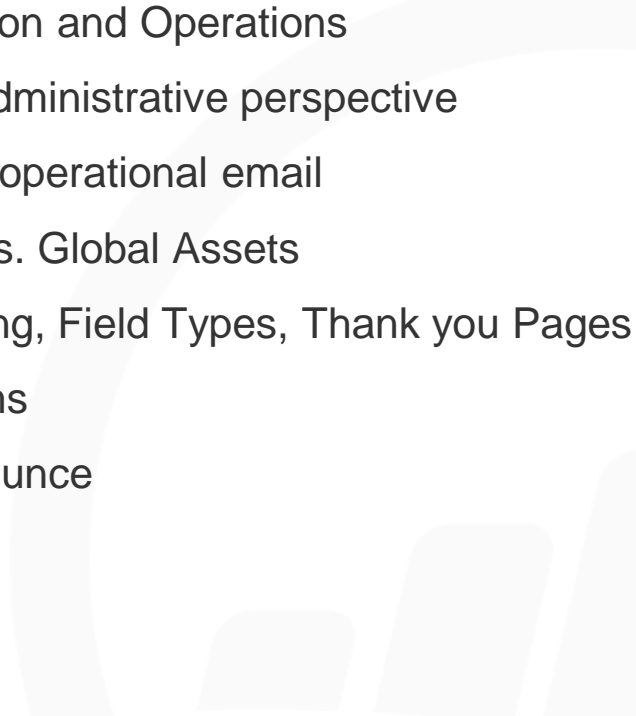
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# Implementation and Operations

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# Objectives

- Best practice strategies for Implementation and Operations
    - How to manage Marketo from an administrative perspective
    - Understanding the difference of an operational email
    - What are the differences of Local vs. Global Assets
    - Marketo Forms, Progressive Profiling, Field Types, Thank you Pages
    - How leads are acquired by programs
    - What is a hard bounce vs. a soft bounce
    - Marketing suspended use cases
    - Understanding Munchkin code
    - Data standardization
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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:** You notice in the email performance report that one email address is still pending two days after executing a program.

- A.** Hard bounce
- B.** Soft bounce
- C.** Invalid email
- D.** Email pending



# 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](#)

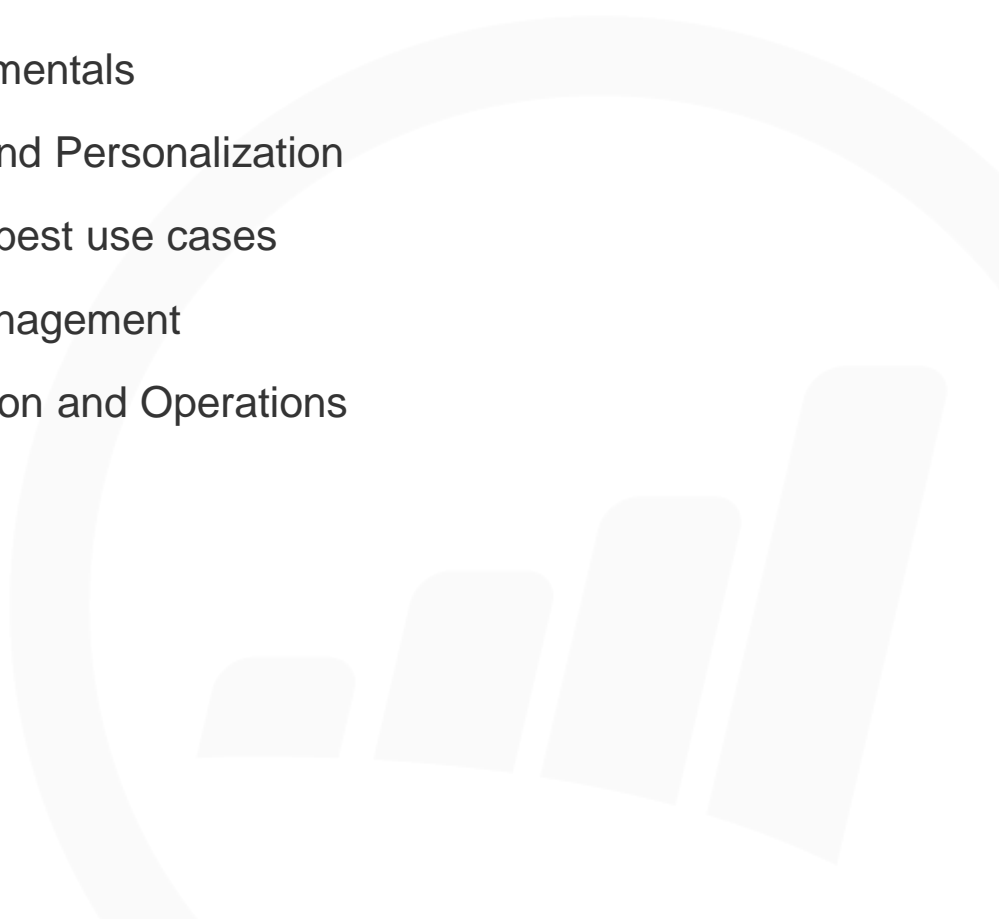
- [Forms](#)
  - [Define Values in a Radio or Selected Field in a Form](#)
  - [Use a Form in a Lightbox](#)
  - [Embed a Form on Your Website](#)
  - [Set a Hidden Form Field Value](#)
  - [Dynamically Toggle Visibility of a Form Field](#)
  - [Show Custom HTML Form for Known Leads](#)
- [Hard and Soft Bounces in Email](#)
- [Understanding Local Assets in a Program](#)

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# Conclusion



# What You've Learned

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

Thank you!

Check out more at Marketo University



<http://learn.marketo.com>