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

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Forming a Successful Marketo Certification Study Group

1. Forming the group
   - The group leader <u>must be</u> 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

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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.

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Exam Topic Areas

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

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Program Fundamentals

30%

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

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: 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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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

Exam Prep Study Tips

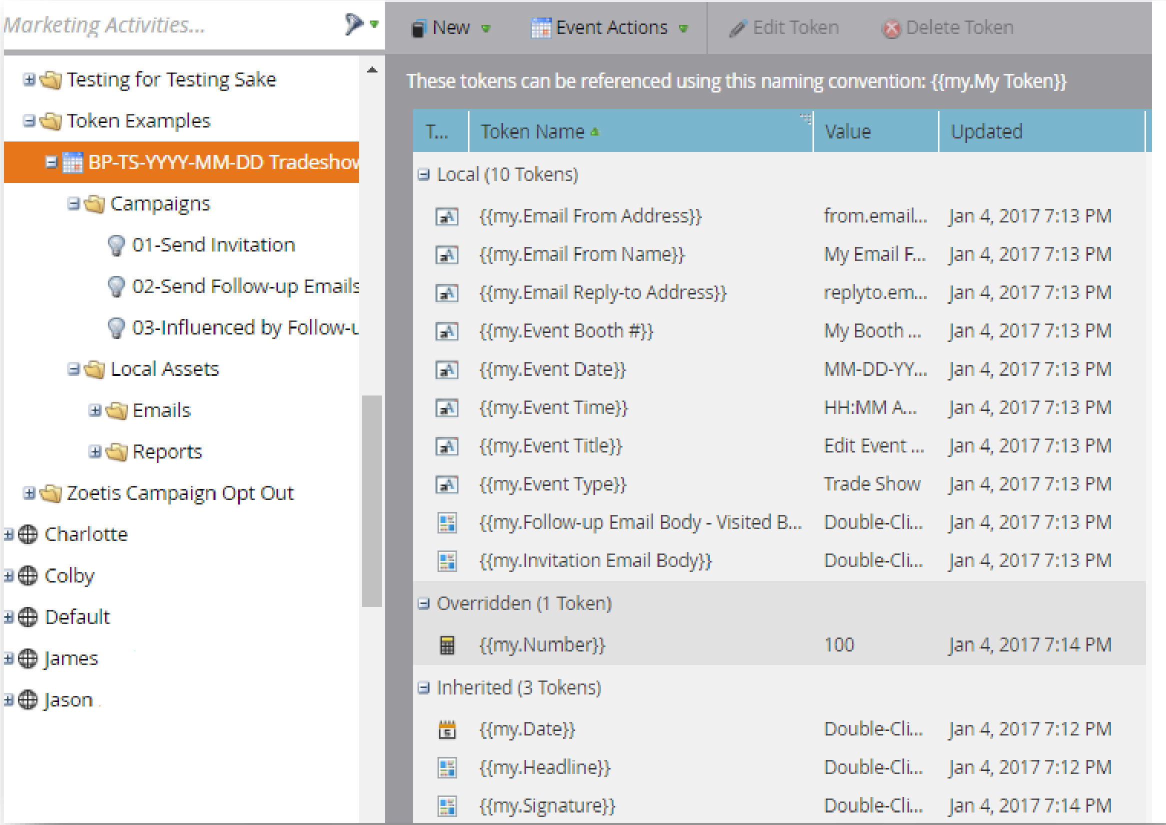
- Understand the requirements for Dynamic content
- Review why a segmentation is different than a smart list
- Understand how token hierarchy works with folders and programs
- Revie and be able to identify the proper use of tokens and the types of token in Marketo

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.

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

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

20%

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

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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Implementation and Operations

18%

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

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

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

Thank you!

Check out more at Marketo University

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http://learn.marketo.com