

Introduction

Welcome to the study guide I put together when studying for the Marketo Certified Expert exam in April 2020. It contains the exam topics listed by Marketo along with my notes and links to documentation for information I thought was important to remember heading into the exam.

The “Tyron’s Important Things To Remember” section contains some bullet points of information I collected when I did not know the answer to sample questions I found online.

Note that the Marketo Certified Expert exam was phased out in January 2022 and has been replaced with the [Marketo Expert Business Practitioner exam](#).

Program Fundamentals

- Given a scenario identify the program types and channels that are appropriate.
- Identify the impact of adding custom tags to a program.
 - Tags will help you organize your programs while channels will assist in gathering data for reporting purposes.
- Identify how to set up programs to yield success metrics.
- Given a scenario or screenshot of a channel, identify the program status transitions that are possible.
- Given a scenario, identify when the recipient time zone feature can be used in a program and how it will affect members in the program.
 - [Understanding Recipient Time Zone | Adobe Marketo Engage](#)
 - Recipient Time Zone currently works only with email content. It will not work for default engagement programs.
 - In order to accommodate every time zone, email programs scheduled with Recipient Time Zone start running at midnight in the **first/earliest** time zone in the world (UTC +14:00).
 - When you schedule an **engagement program stream** and Recipient Time Zone is active, the program cast will start running at **midnight in UTC +14:00. We require you to schedule the first cast at least 25 hours in the future**
 - Marketo calculates time zone based on a person's City, State, Country, or Zip Code. If we're unable to calculate someone's time zone from these values, we revert to our Inferred City, Inferred State, Inferred Country and Inferred Zip Code fields.
 - In cases where we have only Country or only State available:
 - For countries with three or fewer time zones, we select the middle time zone.
 - For states with two time zones, we select the earlier of the two.
 - If we're still unable to determine someone's time zone from any combination of these fields, we will not assign a time zone and the email will be delivered based on your Marketo subscription time zone
 - <https://docs.marketo.com/display/public/DOCS/Schedule+Email+Programs+with+Recipient+Time+Zone>
 - Although the program will start the process of sending emails in 15 minutes, emails won't be delivered at that time. Recipients will still receive emails based on the Time Zone Settings you choose.

- More than 25 Hours: In this case, the program will start running at the scheduled time in the earliest time zone in the world (UTC + 14:00)
 - enable both Head Start and Recipient Time Zone, email programs need to be scheduled at least 12 hours ahead of the scheduled time in UTC +14:00
 - Anyone who unsubscribes between the time you start your email send and when it's actually delivered will still receive the email. We recommend adjusting your unsubscribe notification to reflect that unsubscribes may take 1-2 business days to process.
- Head Start
 - Head Start cannot be used with A/B testing.
 - With Head Start selected, the program will begin processing approximately 12 hours prior to the scheduled time. Once processing starts, the program is locked.
 - Anyone from your audience who unsubscribes after program lock will still receive the email. We recommend adjusting your unsubscribe notification to reflect that unsubscribes may take 1-2 business days to process.
- Aborting with recipient time zone
 - After cancellation, the Results grid of your email program will look something like the one below. Any subsequent sends are canceled and will show up as "Email Bounced Soft" in the Activity Type column.
 - Canceled emails will not show up as a soft bounce until the time they were originally scheduled to be delivered in their respective time zones. Up until that point, they will still display as "Send Email."
- Given a scenario, identify how to test emails using the email program A/B test and champion/challenger test.
- Given a scenario about creating an engagement program, identify the settings that need to be in place for the first cast to go out.
- Given a scenario about an engagement program with exhausted leads, identify what happens if additional content is added to the stream.
- Given an engagement program, identify the relevance of adding, pausing, and removing people from the program.
- Given an engagement program with multiple streams, identify how the streams and transition rules should be set up.
- Identify the asset types that can be used in an engagement program.

- <https://docs.marketo.com/display/public/DOCS/Adding+a+Program+to+an+Engagement+Program+Stream>
 - Be sure to use a Member of Engagement Program filter in your smart list.
- Given a scenario using a webinar platform, identify the options for syncing registration and attendee data.
- Identify how to send a webinar confirmation that includes the unique link to the webinar.
 - {{member.webinar url}} is the link that must be used for joining
 - This matches the URL that is shown in the Google calendar for each lead
 - <https://global.gotowebinar.com/join/{{my.webinar-ID}}/{{member.registration code}}> is not correct
 - <https://global.gotowebinar.com/icsCalendar.tmpl?webinar={{my.webinar id}}&user={{member.registration code}}&cal=google>
 - Both of the above are correct
 - Operational
- Given a scenario identify the proper configuration for the smart campaign.
- Given a screen shot of a smart campaign identify the resulting impact on a particular person in the database.
- Identify situations where the request campaign flow step should be used and the proper configuration for those situations.
 - Long term nurture - when they don't have a budget this year and you just want to stay on the radar
 - Active sales cycle - when the sales person doesn't want any messages to the person except their own. (use the marketing suspended flag to temporarily unsubscribe them)
 - <https://docs.marketo.com/pages/releaseview.action?pagelId=7514898>
 - <https://docs.marketo.com/display/public/DOCS/Request+Campaign>
 - The campaign you are placing the person into must be active and have the Campaign is Requested trigger.

Targeting and Personalization

- Given a scenario about an email with tokens, identify the incorrect use of tokens.
- Given a graphic showing a folder tree with a program and assets and folders under the assets, identify how the tokens will be inherited.
- Identify the purpose of default values in tokens.
- Identify valid local (my) token types.
- Identify the difference between using segmentation and using multiple smart lists.
 - A person might qualify for different segments, but eventually belongs to just one which depends on the priority order of the segments.
 - Smart lists can't create dynamic content. Segmentations can.
 - A lead can only qualify for one segment per segmentation. Multiple smart lists can contain the same lead.
- Identify the requirements for using dynamic content.
- Snippets
 - You cannot embed any Marketo email syntax in snippets; it will not work in an email. Snippets should just be body content (HTML + TEXT).

Analytics and Reporting

- Identify the type of program dashboards available and the components of each.
- Identify how to use different report customization options including custom columns, opportunity columns, smart lists.
- Identify the settings available for different reports including timeframes, subscriptions, and export rows.
 - When a login is required to download reports, if you don't have access to Marketo, you will not receive smart list report emails. This applies to existing and future subscriptions.
 - Anyone can unsubscribe from the report in the email they receive.
- Given a scenario, identify when to use each of the following types of reports: people performance, people by revenue stage, people by status, email performance, email link performance, landing page performance, program performance, company web activity, web page activity, engagement stream performance, campaign activity, and campaign email performance.
- Identify the requirements to accurately report on the success, acquisition, and ROI of marketing activities.

Lead Management

- Identify the parties who should determine the criteria and values for scoring.
- Identify the Marketo features that enable the understanding of the quality of the leads.
- Given a scenario where Marketing has an SLA with Sales, identify the appropriate flow step setup.
- Identify the Marketo features that enable sales to understand a lead's behavior.
- Given a scenario of needing to reset a score, identify the appropriate value.
- Given a scenario where a lead is deemed sales ready, identify the ways this can be communicated to sales.

Explicit scoring is based on information the prospect tells you, or otherwise directly identifiable information. Implicit scoring is based on information that you observe or infer about the prospect, such as their online behaviors

Active Vs Passive Scoring

Possible solutions to this problem might be to look at the overall score versus the score for just the past three months, use interesting moments to flag big actions as soon as possible, or have a separate score for each product line/solution

Implementation and Operations

- Identify a scenario when an unsubscribe link is not needed.
- Identify the use of operational and nonoperational emails for event invitations, confirmations, and reminders.
- Given a scenario about a form, identify how to determine the leads who filled out the form on a specific page.
- Identify the differences between using a local vs. global landing pages.
- Identify how to change the URL of a landing page.
 - Landing page actions: URL tools
- Given a scenario with form visibility rules, identify how the form should be set up so dependent fields show up appropriately.
- Identify the purpose and value of using progressive profiling.
- Identify the purpose of hidden form fields and the means of populating those fields.
 - Default value, URL parameter, Cookie, Referrer Parameter
- Identify how to display thank you pages using choices based on information collected on a form.
- Given a scenario, where a company web page exists and a Marketo form needs to be deployed, identify the available options.
- Identify the features of Marketo that are differentiated from an email service provider (ESP).
 - <https://blog.marketo.com/2012/11/what-is-the-difference-between-email-marketing-and-marketing-automation.html>
- Given a scenario including receiving new leads, identify the ways in which acquisition can be assigned.
 - <https://docs.marketo.com/display/public/DOCS/Understanding+Program+Membership>
- Identify the difference between hard and soft bounces.
 - <https://nation.marketo.com/t5/Knowledgebase/Maintaining-a-Directory-of-Leads-Bouncing-Emails/ta-p/251532>
 - Hard bounces: Email invalid/does not exist & marked as spam by recipient server
- Identify use cases for marketing suspend.
 - <https://docs.marketo.com/display/public/DOCS/Understanding+Unsubscribe>
- Given a scenario about an email need in which consistent repeatable content is required across all emails and maintained in a single location, identify the tools required.

- Given a scenario about a requirements to limit the amount of email a lead receives, identify the appropriate settings.
- Given a scenario including using tokens for scoring, identify the token that is the appropriate one.
- Given a scenario of a company with international prospects, identify the sender's legal requirements for opting in and unsubscribing.
- Identify the purpose of munchkin code.
- Given a scenario about the need to display a value in a form and the requirement to input it into the database using a different value, identify the steps to complete this.
- Identify the benefits of having both text and HTML email versions.
- Given a scenario about having unstandardized data, identify the features that can be used to remedy this situation.
 - <https://gosolomon.com/mce-study-guide-targeting-personalization/>
 - If a lead enters Marketo with a specific data value that you want to change (e.g. United States of America to United States), run them through a smart campaign to standardize their country value. In addition, you can switch your country field on forms to a drop-down of preset values. This goes a long way to standardize values coming into your Marketo instance organically.
 - You can do this with job titles, languages, industry, and other elements that you wish to standardize as well.

Tyron's Important Things To Remember

- Hard bounce
 - Email was rejected because of a permanent condition, such as a nonexistent email address.
- Soft bounce
 - Email was rejected because of a temporary condition, such as a server being down or a full inbox.
- Opened email and clicked email filter both have the platform constraint for seeing who was using iOS or android
- When anonymous records are merged into a new or existing person record, custom field values will not transfer over.
- Unlike other links in Marketo emails, View as Web Page is not tracked as an email click.
- Period costs refer to the money you spend in a specific month on a program.
- Token types
 - Calendar File
 - Date
 - Email Script
 - Number
 - Rich Text
 - Score
 - SFDC Campaign
 - Text
- Communications limits do not apply to operational emails
- Spam laws
 - US is Opt-Out
 - Europe is Double Opt-In
 - Canada is Opt-in
- Engagement program
 - Removing is not advisable because leads will not appear in data/analytics for all historical data
- Snippet
 - An object in the system where rules can be set to change content for use in a landing page or email.
- Cannot get added to a program via a static list
- Remember available webinar partners
 - <https://docs.marketo.com/display/public/DOCS/LaunchPoint+Event+Partners>

- Email Send programs cannot be used in engagement streams because they do not have a send smart campaign that can be used within the stream
- There are two types of content you can add to engagement program streams—emails and programs