



# Marketo Certified Expert Exam

## Preparation Guide:

The Complete Guide to Achieving  
Marketo Expert Certification

2016, v1

Marketo Inc.  
901 Mariner's Island Blvd., Ste 200  
San Mateo CA 94404

# CONTENTS

<b>Certified Expert Preparation Guide .....</b>	<b>2</b>
What's Covered in this Preparation Guide .....	2
Recommended Learning and Experience.....	2
Certified Expert Exam Information .....	3
Exam Format.....	3
Exam Topic Areas.....	3
Topic Study Areas.....	4
1. Basic Administration Topics .....	4
2. Customer Data, Leads and Lists Topics .....	4
3. Asset Design: Images, Forms, Landing Pages and Emails .....	5
4. Programs & Smart Campaigns .....	6
5. Scoring & Lifecycle .....	7
6. Reporting.....	7
7. Marketing Calendar .....	7
Practice Exam & Sample Questions .....	8
Readiness Checklist .....	10
Registering for the Marketo Certification Exam .....	11
Maintaining Your Marketo Certification .....	11
For More information .....	11

# Certified Expert Preparation Guide

---

The Marketo Certified Expert designation is a technical marketing credential that validates an individual's competency, expertise, and operational knowledge in the broad use of Marketo. This designation clearly demonstrates to the marketplace that these certified professionals possess knowledge and skills in all functional areas of Marketo, while exhibiting commitment to professional growth. Please note, Marketo Certification Exams are open only to Marketo Customers and Partners.

## What's Covered in this Preparation Guide

This Marketo Certified Expert Preparation Guide is designed to help you prepare for the Certified Expert Exam. It includes:

- Recommended learning and experience for certification
- Overview of the certification exam and key topic areas
- Preparation recommendations
- Exam registration instructions

## Recommended Learning and Experience

Marketo recommends a combination of training, documentation, community sharing, and on-the-job experience to increase your chances for success. Key recommendations:

- ✓ One year of marketing experience
- ✓ A minimum of 6 months experience using Marketo or a lot of hands-on experience creating assets, campaigns and doing analytics
- ✓ Completion of Marketo Foundation Training (recommended, not required)
- ✓ Review of Marketo Product Docs ( <http://docs.marketo.com> )
- ✓ Review courses in the Certified Marketo Expert Preparation Learning Path in the Marketo University ( <https://learn.marketo.com> )
- ✓ Participation in Marketo Learning Passport program webinars and topics as well as Marketo Community discussions (recommended, not required)

## Certified Expert Exam Information

The Marketo Certified Expert Exam has been designed to assess your knowledge and proficiency in the use of Marketo. The exam is rigorously developed and professionally administered in order to provide a highly respected technical marketing credential.

### Exam Format

The current Marketo Certified Expert Exam has the following characteristics:

- ✓ Approximately 100 multiple choice items
- ✓ Time allotted to complete the exam: 90 minutes
- ✓ Exams are scored based on the number of correct answers divided by the total number of questions
- ✓ Minimum passing score: 75%
- ✓ Registration fee: \$175 (USD)

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 exam content very seriously.

### Exam Topic Areas

The Marketo Certified Expert Exam measures the candidate's knowledge and skills related to the topic areas listed below. The Exam Breakdown provides insight into the approximate amount of focus applied to each topic area in the exam.

Topic Area	Exam Breakdown
Basic Admin and Setup	5%
Managing Customer Data, Leads and Lists	20%
Asset Design: Images, Forms, Landing Pages and Emails	15%
Programs and Smart Campaigns	35%
Lead Scoring and Lifecycle	10%
Reporting and Basic Analytics	10%
Marketing Calendar	5%

## Topic Study Areas

Below is a list of areas of study, including links to Marketo's Docs site. Candidates should have hands-on experience as a Marketo practitioner and be familiar with the topics below:

### 1. Basic Administration Topics

1. Configure email settings: [Block Field Overwrites: Identify which Fields should not Overwrite](#)
2. Know about Channels and Tags [Ignored Fields and Blocked Field Updates during List Import](#)
3. Configure fields for data integrity [Create a Program Channel](#)
4. Set, create, and edit user roles and assign them to users: [Managing User Roles and Permissions](#)

### 2. Customer Data, Leads and Lists Topics

1. Import lists needed for marketing programs
  - Add yourself as a lead: [Using Flow Actions](#)
  - Upload a list of leads: [Import a List of Leads](#)
  - Check a lead's activity: [Reviewing Lead Details](#)
  - What are my leads doing: [How to Review the Activity Log](#)
  - Create a custom view of leads: [Custom Tab for Lead Detail](#)
2. Identify junk data , learn about merge/de-dupe: [Working with Duplicate Leads](#)
3. Understand standard system Smart Lists and create Smart Lists to segment leads
  - Marketo's OOTB Smart Lists: [Smart Lists](#)
  - Build Smart Lists and start segmenting: [Create and Change Views for Lists and Smart Lists,](#)
4. Learn how a lead status goes from anonymous to known and how to change a lead status
  - Control your Lead Database: [Data Management](#)
  - Fix junky data with lead actions: Data Clean up and Management

### 3. Asset Design: Images, Forms, Landing Pages and Emails

1. Upload images and files, or grab them from the web
  - [Upload Images and files](#)
  - [Search for images](#)
  - [Get image URL](#)
2. Create emails and landing pages
  - Email basics: [Create or Edit an Email](#)
  - Email Deliverability: [Set up SPF and DKIM](#)
  - Create a Local Asset Landing Page: [Create a Landing Page](#)
  - Add social tools to landing pages: [Social buttons](#)
3. Build a form with progressive profiling
  - The basics: [Configure Form Progressive Profiling](#)
  - Hidden fields on forms: [Set a Form as Hidden](#)
4. Use tokens in emails
  - [Personalizing emails using tokens](#)

## 4. Programs & Smart Campaigns

1. Define a foldering and naming protocol consistent with Marketo's best practices
  - Set up a logical, scalable foldering system: [Understanding Local Assets in a Program](#)
  - Smart Campaign Checklist: [Smart Campaign Checklist](#)
  - Understanding Smart Campaigns: [Smart Campaigns](#)
  - Renaming Marketo Assets: [Rename Marketo Assets](#)
2. Create a program and assign an appropriate channel and/or tags
  - Overview of Programs: [Understanding Programs](#)
  - Basics on creating a Program: [Create a Program](#)
  - Always use the Cost tag: [Use Tags in a Program](#)
  - Working with Channels: [Create a Program Channel](#)
3. Basics of Marketo Program Campaign flows: basic email, auto response, lead nurture, webinar
  - Basic campaigns: [Create a New Smart Campaign](#)
  - Nurture leads: [Create an Engagement Program](#)
  - Event Management with Marketo: Understanding Event Programs
  - How to send out an email when a lead fills out a form: [Email Auto Response](#)
4. Cloning Programs
  - Quick and easy way to scale: [Clone a Program](#)
5. Tokens
  - Understanding My Tokens: [Tokens Glossary](#)
  - Other ways to use tokens: [Tokens for Flow Steps](#), [Tokens for Interesting Moments](#), [Add Text and Tokens to a Landing Page](#)
  - [Manage my tokens](#)

## 5. Scoring & Lifecycle

1. Identify score fields: lead, behavior, demographic
  - Create Scoring Campaigns: [Simple Scoring](#)
  - Definitive Guide to [Lead Scoring](#)
2. Define Interesting Moments and Make Campaigns [Sales Insight]
  - Interesting Moments Overview: [What are interesting Moments?](#)
  - [Creating and Using Interesting Moments](#)
3. [Define and assign lead statuses](#), [Send leads to Sales](#)

## 6. Reporting

1. Basic Reporting: [Getting Started](#)
2. Define and differentiate between the [different report types](#)
3. Use reporting features: [subscription](#), [manage report subscriptions](#), drill down Smart Lists in lead reports, add [custom columns](#)
4. [Getting Started with Analytics](#)

## 7. Marketing Calendar

1. Marketing Calendar Overview: [Navigating the Marketing Calendar](#)
2. [View Entry Details](#)
3. [Filtering the Marketing Calendar](#)
4. Watch the [Marketing Calendar Demos](#) in the Marketing Nation Community (login required)



## Practice Exam & Sample Questions

Please take advantage of the [Marketo Certified Expert Practice Exam](#) to test your skills. The Practice Exam contains 150 questions that reflect the concepts and topics covered in the Marketo Certified Expert Exam. Practice Exam results are populated immediately upon submission and include an outline of your correct and incorrect answers for review.

For your convenience, the following questions are representative of those on the Certified Expert Exam. Actual exam questions may be more or less difficult than the questions below.

1. Which of the following is NOT true about a snippet?
  - A. A snippet is any graphical element used on more than one asset.
  - B. A snippet is a grouping of texts and graphical elements that can be associated to a segment.
  - C. A snippet is re-useable content for implementing dynamic content
  - D. Snippets are assigned to single editable regions within an email.
  
2. Which report indicates the ROI on your marketing programs?
  - A. Program Performance Report
  - B. Landing Page Performance Report
  - C. Email Performance Report
  - D. Campaign Activity Report
  
3. To prevent a Marketo form fill out from updating existing data in the Lead Source field, you can
  - A. Block field updates in the field management area of admin
  - B. Create a custom layout in the field management area of admin
  - C. Add a new custom field in the field management area of admin
  - D. Create a user role to prevent it

4. Which of the following is true about tracking known user activity?
  - A. Tracking known user activity across multiple domains is possible if the user visits each domain's website
  - B. Tracking known user activity across multiple domains is possible if the user fills out a form or clicks a link in an email that directs to each domain
  - C. Tracking known user activity across multiple domains is possible if the user fills out a form on one website and then visits subsequent websites
  - D. Tracking known user activity across multiple domains is NOT possible because you can only track a visitor on a single website
  
5. One way to de-duplicate your database is to use which of the following?
  - A. Use the Merge Leads functionality
  - B. Use the Remove from Flow functionality
  - C. Use the Delete Lead functionality
  - D. Use the Remove from List functionality
  
6. How many lead records will exist when a person fills out the same Marketo form multiple times with the same email address?
  - A. One
  - B. Two
  - C. Multiple
  - D. Zero
  
7. Progressive Profiling \_\_\_\_\_
  - A. is used to capture additional new information for a lead.
  - B. requires a hidden field.
  - C. displays all fields on the form every time.
  - D. requires at least one token to implement.
  
8. If a lead reaches the Program Status of "success," what does that indicate?
  - A. The lead performed the desired action as defined by the program channel.
  - B. A lead became a member of the program.
  - C. An email was successfully opened by 100% of recipients.
  - D. An event enrolment met your goal.

9. Channels are a type of
- A. Tag
  - B. Asset
  - C. Token
  - D. Status
10. Which of the following can be used as a filter in Smart Lists?
- A. Score Values
  - B. Tags
  - C. Snippets
  - D. Tokens

## Readiness Checklist

This checklist outlines the types of skills you'll need to be familiar with in order to pass the Marketo Certified Expert exam. Read and check-off each of the skills listed below as a part of your certification preparation plan.

### Basic Administration

- Set up users and roles
- Manage and import customer data
- Define which data fields are imported or omitted
- Create segments

### Leads/People & Lists

- Import lists
- Monitor lead/people activity using the activity log and custom views
- Identify and remove duplicate leads/people
- Create Smart Lists including constraints and filters

### Asset Design

- Upload images
- Create personalized emails
- Create landing pages
- Create forms with progressive profiling

### Programs & Smart Campaigns

- Choose programs with appropriate channel and/or tags
- Understand nurturing and progression status
- Identify status change activities
- Create and run Smart Campaigns
- Monitor and measure program costs
- Limit led exposure to programs

### Scoring & Lifecycle

- Set up scoring campaigns
- Understand lifecycle and track velocity

### Reporting

- Understand and run standard reports
- Create and run custom reports

### Marketing Calendar

- Understand Marketing Calendar views
- Filter the Marketing Calendar

## Registering for the Marketo Certification Exam

All Marketo certification exams are delivered by Kryterion, Marketo's exam delivery partner. To register for the Marketo Certified Expert exam, please visit: [www.webassessor.com/marketo/](http://www.webassessor.com/marketo/)

## Maintaining Your Marketo Certification

The Marketo Certified Expert credential is valid for one year from the date you pass the exam. You can take the exam to recertify any time before your anniversary date and up to 2 weeks after that date. Your recertification will be effective as of the date you pass the exam. If you do not recertify, you will lose your status and benefits as a Marketo credential holder until you recertify.

## For More information

Have a question about Marketo Certification? Contact us at [certification@marketo.com](mailto:certification@marketo.com) for additional details about the program.