Marketo Certified Expert

Preparation Guide:

The Complete Guide to Achieving
Marketo Expert Certification

2015, v3

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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 Lead Management operation, while exhibiting commitment to professional growth.

What's Covered in the Preparation Guide

This Marketo Certification Preparation Guide is designed as a self-study guide to success in the Marketo Certified Expert Exam. It includes:

Readiness checklist and suggested prerequisites	Determine if you can leap ahead to exam registration or if you need further study and hands-on time with Marketo features.
Exam testing topic areas	See how the exam is weighted by topic and become familiar with question format and difficulty.
Annotated links to articles and training and content	Marketo recommends a combination of training, documentation, community sharing, and on-the-job experience to increase your chances of passing the exam.

Recommended Learning and Experience Prerequisites

- ✓ One year of marketing experience
- ✓ One year using Marketo or a lot of hands-on experience creating assets, campaigns and doing analytics
- ✓ Completion of the Foundation Build Workshop, including completion of all exercises
- ✓ Consumption of Marketo Product Docs
- ✓ Participation in Marketo Learning Passport program webinars and topics as well as Marketo Community discussions.
- ✓ The official 150 question Marketo Certified Expert Practice Exam

Certification Exam Format

The current Marketo Certified Expert Exam has the following characteristics:

- ✓ Approximately 100 multiple choice items
- ✓ 90 minutes allotted to complete the exam
- ✓ Registration fee of USD 175

- ✓ 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.

Readiness Checklist

Are you comfortable doing all of these tasks or understanding how they work?

Basic Administration

- ☐ Users and role management
- ☐ Managing and importing customer data
- ☐ Enable communication limits
- ☐ Defining which data fields are imported and blocked
- ☐ Understand tag management

Leads, Lists and Smart Lists

- ☐ Importing lists
- ☐ Monitoring lead activity using the activity log, custom views and lead detail pop-up
- ☐ Identifying, removing and merging duplicate leads
- ☐ Understand known and anonymous leads
- ☐ Creating smart lists, including constraints and filters
- ☐ Differentiate between lists and smart lists
- ☐ Defining smart list filters

Asset Design

- ☐ Understand landing page basics
- ☐ Creating landing pages
- ☐ Uploading, replacing and grabbing images
- ☐ Landing page and template lifecycle
- ☐ Understand form basics
- ☐ Creating forms with progressive profiling
- ☐ Understand email basics
- ☐ Creating personalized emails

Programs and Smart Campaigns

- ☐ Understand Programs basics
- ☐ Choosing programs with appropriate channel and/or tags
- ☐ Understand lead nurturing and program status
- ☐ Identify when a lead status changes
- ☐ Create and run smart campaigns
- ☐ Monitor program period costs

- [ ] Schedule programs and limit over-messaging
- [ ] Understand the different types of programs available (email, events, engagement, default)
- [ ] Understand the rules of nesting programs
- [ ] Understand the different types of local assets available
- [ ] Identify the difference between local and non-local assets
- [ ] Cloning and importing programs
- [ ] Smart campaign basics
- [ ] Create and run smart campaigns

Lead Scoring and Life Cycle

- [ ] Setting up lead scoring campaigns
- [ ] Knowing how to run lead lifecycle campaigns to track lead velocity

Reporting and Analytics

- [ ] Understand and run standard reports
- [ ] Create and run custom reports
- [ ] Differentiate between standard vs. custom reports
- [ ] Understanding the types of available reports

Marketing Calendar

- [ ] Understand Marketing Calendar views
- [ ] Create and run custom reports

By "comfortable" we mean you have completed these tasks on your own in a real-world situation.

If this describes your level of comfort on the topics above you are very likely ready to attempt the Marketo Certified Expert Exam. **Click here to register for the test.**

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 perform the tasks listed as Exam Objectives within each content area.

Objective	Approx. Weighting
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%

Sample Exam Questions/Practice Exam

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.

In the meantime, you may review the following questions which are representative of those on the Marketo Certified Expert Exam. These questions are not designed to test your readiness to complete the certification exam, but they do show the format of the questions you can expect. 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 enrollment 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

Topic Study Areas

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](#)

For More information

Have a question about Marketo Certification? Check out the [Marketo Certification FAQ](#) or email certification@marketo.com for additional details about the program.