Welcome to Marketo Training!

Topics Covered in this training:

- Workspaces and Partitions
- Create a New Smart Campaign
- Create a Smart List
- Find and Add Filters to a Smart List
- Define Smart List Filters
- Create an Email Program
- Define an Audience with a Smart List
- Schedule your Email program
- Approve an Email Program
- Create an Analytics Report in a Program
- Munchkin Tracking Code

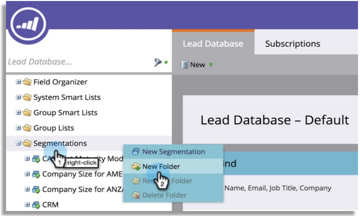
Additional detailed assistance can be accessed at: https://docs.marketo.com/display/public/DOCS/Welcome+to+Marketo+Docs

1. Workspace and Partitions

Workspaces are separate areas in Marketo that hold marketing assets like programs, landing pages, emails and more. They can be used by multiple people. Each user has access to one or more workspaces. Some reasons you might use a workspace:

- **Geography**: Europe, Asia and North America marketing departments each get a workspace
- **Business Unit**: Quicken, Quickbooks and TurboTax each get a workspace

In each case, the separation is because the marketing assets are completely different. If they share marketing assets, then workspaces may not be the right tool for you.



Here's how to share assets across workspaces. It works the same for anything you want to share. (This example shows segmentations.)

1. Create a new folder.
2. Name the folder you are going to share.
3. Move the asset(s) you want to share into the folder.
4. Right-click the folder and select Share Folder.
5. Select the workspace(s) you want to share the folder with and click Save.

1. Workspace and Partitions continued

Note: The Share Folder dialog box will only display workspaces you have permission to view.

The originating folder will now have a little green arrow, indicating it was shared.
In the workspace shared, the folder will have a padlock, indicating read-only.
You can share these items across workspaces.

- Email templates
- Landing page templates
- Models
- Smart campaigns
- Smart lists
- Segmentations
- Snippets

Cloning across Workspaces

For assets that aren't templates, its best to clone them as local assets inside of a program. With the proper access level, you can drag and drop these assets into another workspace:

- Programs
- Emails
- Landing Pages
- Forms

Moving Assets to other Workspaces

To move assets to a new workspace, put them into a folder and drag the folder over to the other workspace.

Note: You can't move a program that contains members from one workspace to another.

Lead Partitions

Lead partitions act like separate lead databases. Each partition has its own leads that do not de-dupe or mix with other partitions. You can assign lead partitions to workspaces in the following configurations:

- one workspace to one lead partition (1:1)
- one workspace to many lead partitions (1:x)
- many workspaces to one lead partition (x:1)

Reasons you would use a lead partition:

- Your workspaces not only have different assets, but do not share leads either, or, You want duplicates for other business reasons

Note: Lead partitions do not interact with each other, so be careful when setting them up.

Create a Lead Partition

Admin Permissions Required. Lead Partitions can be complex. Please contact Marketo support for help in setting them up.

- Under Admin, select Workspaces & Partitions.
- Go to the Lead Partitions tab and click New Lead Partition.
- Name your partition, choose the Workspaces where it will appear, and click Create.

After creating the partition, you should see the update. You now know how to create a Lead Partition!

2. Create a New Smart Campaign

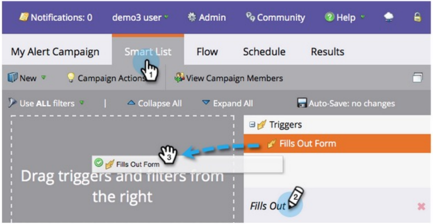
Smart Campaigns are the most important tool in Marketo. They can trigger on one person and perform actions, or rollup millions of people and run a series of flow steps. Smart Campaigns can be created as a Local Asset of any Program.

- Go to the Marketing Activities area.
- Choose a Program and then under New click on New Local Asset.
- Click on Smart Campaign.
- Enter smart campaign name and click Create.

Note: Batch Smart Campaigns can be scheduled for recurrences, such as daily, weekly, and monthly. You can also have them run just one time, and they are visible on the program schedule view.

**Note that anything after a "Wait" step within the smart campaign will not be included on the view.*

3. Create a Smart List



Prerequisites: Create a Program

Smart lists allow you to find specific groups of people using simple filters. Here's how to create one:

- Go to the Marketing Activities area.
- Select the program you want to create the smart list in.
- Under New, click New Local Asset.
- Select Smart List.
- Enter a Name and click CREATE.

4. Find and Add Filters to a Smart List

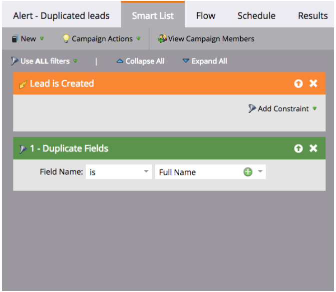
Prerequisites: Create a Smart List

Once you have created a smart list, you need to add filters to it and define them. Here is how to find and add filters. In this example, let's find all people in California with a score over 50.

Explore the tree on the right. You will be surprised how much expressiveness there is for you to use.

- Go to the Marketing Activities area.
- Select the smart list you want to add filters to and click on the Smart List tab.
- Find and drag the State filter into the canvas.
- Also find and drag the Lead Score filter into the canvas.

5. Define Smart List Filters



Prerequisites:

- Create a Smart List
- Find and Add Filters to Smart Lists

Now that you have created a Smart List and added filters to it, let's define the filters to finish up. Here is how:

As an example, let's define these filters to find all people in California with a score over 50.

- Go to the Marketing Activities area.
- Select the smart list and click on the Smart List tab.
- Find and select CA for the State filter.
- Use a selection such as “greater than and enter 50.”

6. Create an E-Mail Program

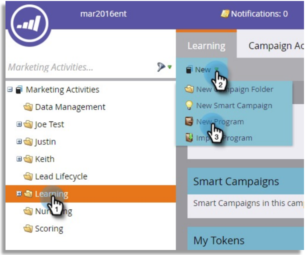
This can include a custom HTML doc that is hard-coded or by selecting an available template.

1. Go to the Marketing Activities area.
2. Select the folder you want to create the program in, click the “New” drop-down and select New Program.
3. Enter a Name, select Email as the Program Type and click Create.

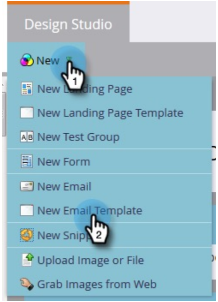
Note: When you create an email, you have several free templates to choose from. You can also create your own template and save it for future use.

If your email is critical and you want it to circumvent Communication Limits, make it operational by checking the box.

Open in editor is selected by default, and simply means you want to start editing your new email right away. Create means, create!



6. Create an E-Mail Program continued



Starter Templates include a collection of ready-to-go responsive email templates.

You may use them as-is, or customize them to your liking.

All folders that appear under **Emails** > **Templates** in your Design Studio tree will be available in My Templates.

To preview a template, hover over its thumbnail and click Preview. You can also just double-click it.

Create a new email template

Marketo Support is not set up to assist with troubleshooting custom HTML. For HTML assistance, please consult a web developer.

- Click Design Studio.
- Click New, then select New Email Template.
- Give your new template a name and click Create.
- To begin editing your new template, click Edit Draft.

7. Define an Audience with a Smart List

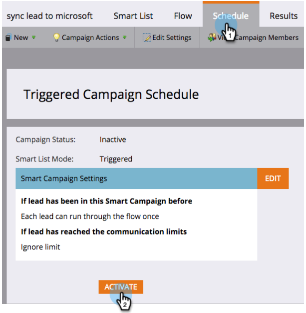
Prerequisites: Create an Email Program

Once you "Create an Email Program," you will want to tell it who to send the email to. You can do this by "Importing a List of Leads" or with a smart list. Here is how to use a smart list:

Note: Defining your audience will only work when the email program is not approved.

1. Go to the Marketing Activities area.
2. Select your email program and then click Edit Smart List under the Audience tile. (Note: Make sure the View is set to Control Panel to find this setting.)
3. Find the filter(s) you want to use and drag it into the canvas.
4. Define the filter(s). (Check out the Smart Lists and Lists to learn more about using and defining filters.)
5. When you are done adding and defining filters, go back to the main program tab. You will see how many people qualify.
6. Click the number for a detailed list of people blocked from mailings.
7. Use the button on the Audience tile to see how many leads will receive the email.

8. Schedule Your E-Mail Program



Prerequisites: Create an Email Program

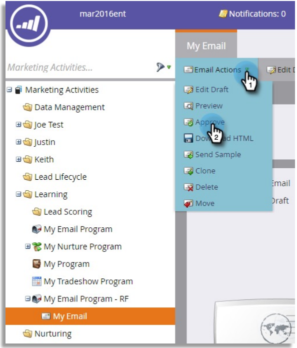
- Define an Audience with a Smart List or by Define an Audience by Importing a List
- Choose an Existing Email or Create an Email for an Email Program

With your email program created, the audience defined, an email selected, you will want to tell your program when to send the email. Here is how:

- Go to the Marketing Activities area.
- Select your email program.
- Under the Schedule tile, set the date.
- And then the time.

The only thing left is to Approve/Unapprove an Email Program and you are good to go.

9. Approve an E-Mail Program



Prerequisites:

- Create an Email Program
- Define an Audience with a Smart List or by Define an Audience by Importing a List
- Choose an Existing Email or Create an Email for an Email Program
- Schedule Your Email Program

Now that your program is ready to go, the final step is to approve it. Here's how:

1. Go to the Marketing Activities area.
2. Select your email program. **Note: If you do not approve your email program, the email will not go out.**
3. Under the Approval tile go ahead and click on Approve Program.
4. If we find issues we will let you know, fix them and try approving again.

Your email will go out at the scheduled time.

Unapprove Your Email Program:

If you change your mind and decide you don't want it to go out, you can unapprove the email program.

- Go to the Marketing Activities area.
- Select your email program.
- Under the Approval tile, simply click on Unapprove Program.

Your email will not go out at the scheduled time until you approve it again.

10. Create an Analytics Report

Run a report to analyze your leads, your programs, landing pages, emails, and social assets.

1. Go to the **Marketing Activities** area.
2. Select a program to run. (Note: You can also create reports from the Analytics tab.)
3. Right-click the program and select **New Local Asset**.
4. Click **Report**.
5. Select the **Report Type**. See Report Types for a short description of each.
6. Name your Report. To make navigating your reports later much easier, include a reference to the report type in the name.
7. Set the time frame of your report. *See Change a Report Time Frame*
8. Click the **Report Tab** to see your statistics.

Note: By default, reports cover all the activity in your account, across programs. You can quickly end up with a lot of reports. Remember to Delete a Report you no longer need.

11. Munchkin Tracking Code

Please ensure that you have access to an experienced JavaScript developer.

Marketo Technical Support is not set up to assist with troubleshooting custom JavaScript.

(Note: This is supposed to be integrated with Telium so the following is for knowledge of process – Paula N).

Marketo's custom JavaScript tracking code, called Munchkin, tracks all individuals who visit your website so you can react to their visits with automated marketing campaigns. Even anonymous visitors are tracked along with their IP addresses and other information. Without this tracking code, you will not be able to track visits or other activity on your website!

1. Add Tracking Code to Your Website
2. Add Tracking Code when Using Multiple Workspaces
3. Types of Munchkin Tracking Codes
4. Test if Your Munchkin Code is working

Add Tracking Code to Your Website

- Click Admin at the top right of the app and click Munchkin in the tree on the left.
- Select Asynchronous for Tracking Code Type. Note: In almost all cases, you should use the asynchronous code.
- Click and copy the Javascript tracking code to put on your website. Note: You must use the unique code that appears in your account

For best results, use the asynchronous Munchkin code and place it inside the <head> elements of your pages. If you are using the simple code (not recommended), this is right before the </body> tag.

Note: Put tracking code on the web pages you want to track. This may be every page for smaller sites, or only key pages on sites that have many dynamically generated Web pages, user forums, and so on.

For sites that see a high volume of traffic (i.e., hundreds of thousands of visits per month), we recommend you opt not to track anonymous leads.

Add Tracking Code when Using Multiple Workspaces

If you're using Workspaces in your Marketo account, you probably also have separate web presences that correspond to your workspaces. In that case, you can use the Munchkin tracking Javascript to assign your anonymous leads to the correct workspace and partition.

1. Click Admin at the top right of the app and click Munchkin in the tree on the left.
2. Select the appropriate workspace for the web pages you wish to track. If you don't use the special workspace Munchkin code, the leads will be assigned to the default partition that was created when your account was set up. It's named "Default" initially, but you might have changed that in your own Marketo account.
3. Select Asynchronous for Tracking Code Type.
4. Click and copy the Javascript tracking code to put on your website. Use the unique code that appears in your account!
5. Place the tracking code on your web pages in the <head> element. New leads that visit this page will be assigned to this lead partition.

Note: You can only use one Munchkin tracking script for a single partition and workspace on a page. Do not include tracking scripts for multiple partitions/workspaces on your website.

Landing pages created in Marketo automatically contain tracking code, so you don’t need to put this code on them.

11. Munchkin Tracking Code continued

Three types of Munchkin Tracking Codes

There are three (3) types of Munchkin tracking codes you can choose from. Each impact the webpage load times differently.

- **Simple**: Has the fewest lines of code, but does not optimize for webpage loading time. This code loads the jQuery library each time a webpage is loaded.
- **Asynchronous**: Reduces webpage loading time. This code checks if the jQuery library already exists, loads it if it's missing, and uses it for executing tracking code once the rest of the webpage has loaded.
- **Asynchronous jQuery**: Reduces webpage loading time and also improves system performance. This code assumes that you already have jQuery, and does not check to load it.

Test if Your Munchkin Code is Working:

To check that your Munchkin code is working after you've added it - visit the web page and click something on the page.

Build a Smart List for that page using the "Clicked Link on Web Page" or "Visited Web Page" filters or "Clicks Link on Web Page" or "Visits Web Page" trigger.

- Additional detailed assistance on processes and features can be accessed when logged in: https://docs.marketo.com/display/public/DOCS/Welcome+to+Marketo+Docs

End of Training

Additional detailed assistance can be accessed at: https://docs.marketo.com/display/public/DOCS/Welcome+to+Marketo+Docs