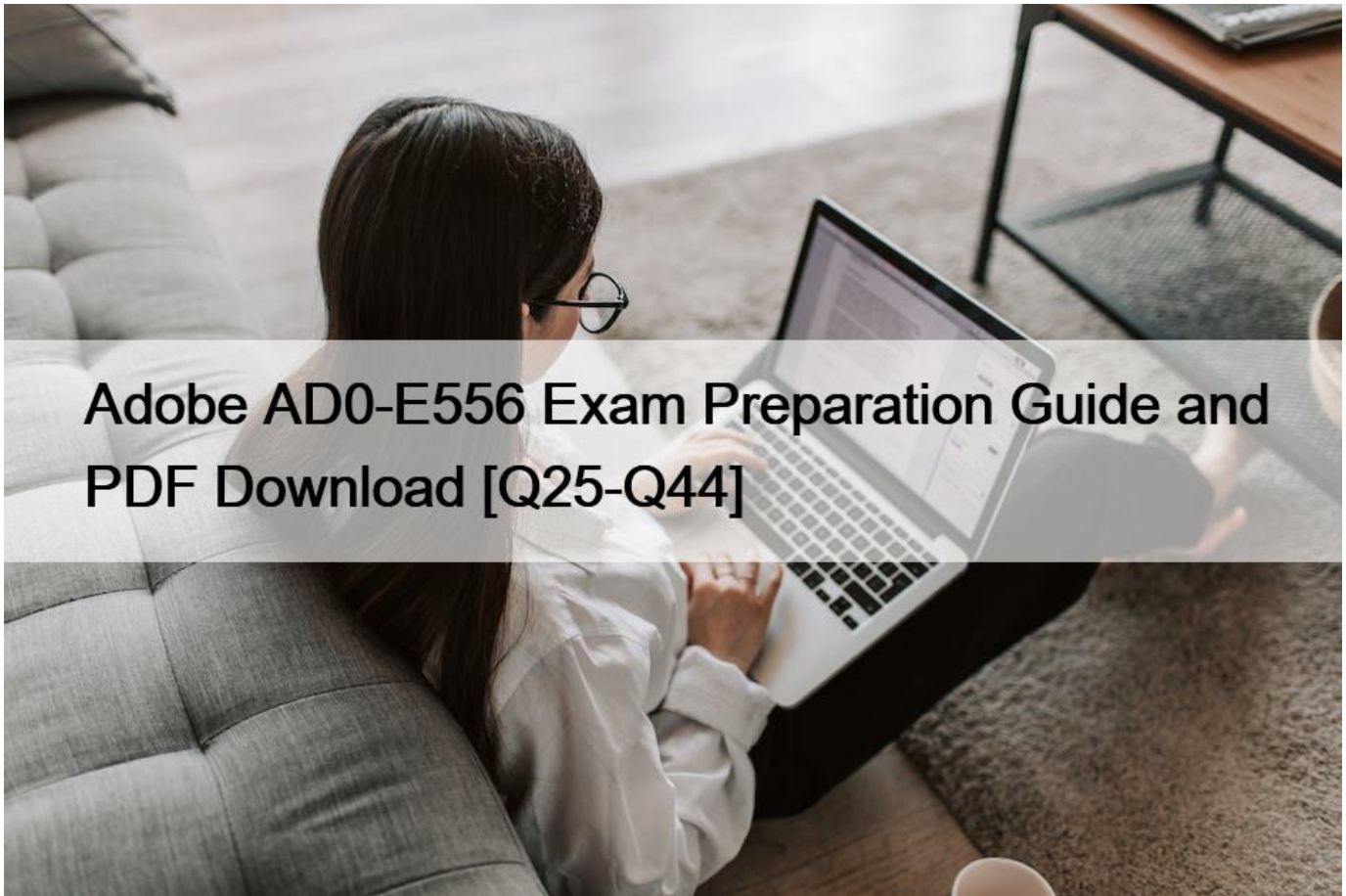


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UNICORN FINTECH COMPANY PROFILE

Unicorn Fintech is a mobile-only financial-services startup created by a consortium of consumer banks to resell savings, checking, loan, transfer/remittance, and other services from a secure smartphone app. The company is venture-funded, and plans to reach profitability before a planned IPO in two years.

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Marketing is responsible for acquiring new customers through online, television advertising, and email campaigns, and for cross-selling new services to customers through IM, email, and in-app campaigns.

Evaluating the success of these campaigns has been a persistent problem: although the company can track revenue by product line, it can't attribute those revenues to campaigns: for example, did a new loan come from onboarding a new customer, or by cross-selling a savings-account customer? Marketing currently uses crude, manual tools and guesswork to evaluate the quality and lifespan of new leads, and even the deliverability of emails in its external campaigns. As a result, the department can't

allocate spending to the most productive campaigns, or decide how much different touchpoints in multi-stage campaigns contribute to revenue. Operational processes to connect lead data to CRM and other databases are entirely manual.

Staffing and leadership

Unicorn has fewer than 200 employees, and roles aren't always defined in traditional ways. Since customer acquisition and cross-selling are primarily through electronic channels, Marketing and IT roles especially often overlap. The traditional Sales role falls entirely to Marketing, and IT is responsible for the Salesforce CRM system, Google Analytics, and a handful of third-party integrations. The CMO and CIO work closely together on most initiatives, and budgets are typically project-driven rather than fixed annually. Individual contributors to Marketing campaigns include the Marketing Operations Manager, responsible for lead scoring and analytics. Key IT contacts include the CRM Administrator and Web Developer. Incidental contributors are the Corporate Attorney, who signs off on opt-in/out and DMARC policies.

Revenue sources

Unicorn earns commissions on financial services delivered by the banking consortium through its apps, including fixed finders' fees for what the company calls "customers who initially engage with Unicorn, but then to receive services directly from a consortium bank. Unicorn needs to attribute revenue from these customers to its own campaigns; currently, it's impossible to attribute ROI to individual campaigns, or provide documentation to claim commissions on "Current and aspirational marketing technology Current Marketing technology consists of Marketable, an open-source lead management solution supported by a set of spreadsheets and scripts developed in-house. Marketable offers lead tracking and source attribution, but not multi-touch source attribution. Unicorn Fintech Marketing has difficulty linking the different stages of customer campaign journeys, and relies on scripts to translate Marketable's sales alerts into next steps it could use in multi-touch campaigns. IT has worked out scripts to input Marketable qualified leads into Salesforce, but the system is brittle and often requires manual intervention.

Current campaign management processes

A typical email campaign:

- * Addresses a purchased (for customer acquisition) or in-house (for cross-sell) list. Purchased lists range from 300,000 to 1.5 million addresses
- * Is sent from multiple data centers in the US and Canada
- * Includes an "unsubscribe"; opt-out below the message
- * Is static; there are no formula fields
- * Uses no deliverability authentication, nor integration with any email management platform.

All campaigns to date direct respondents to a single landing page with the company's "all markets" message.

More sophisticated targeting is a high priority.

Current lead management and attribution

Unicorn's lead-management process follows

Marketable's out of the box defaults: lead evaluation levels 1 through 3, lifecycle stages unqualified; and

qualified. The qualification processes are manual, and highly subjective: Marketing staff classify leads according to prospect email responses, including free-form comments. Sales followup is by email forms prompting higher levels of engagement. The company intends to phase out Marketable and replace spreadsheets and scripts with native features of whatever solution set it adopts.

Attribution processes are binary: response to a campaign email or web visit is rated a success if it results in a sale: there is no success rating assigned to TV ads that result in web visits, for example. Cost are not allocated to individual campaigns.

The Marketing department plans to expand outreach to social media (Facebook, Twitter, Instagram, in-house and third-party financial blogs), and wants to make sure it can assess the ROI of these channels, and the overall social media program.

Current governance processes

Currently, the Marketing department assigns content development and campaign management duties to team members on a campaign-by-campaign basis. All team members (and IT) have access to all assets and tools, which sometimes leads to duplication and conflicts. The CMO realizes that a more specialization will be necessary to support the social media campaigns, but hasn't decided on the optimal organizational model.

Input of qualified leads from Marketable into

Salesforce is by manual cut-and-paste, assisted by scripts; inconsistency of input practices across Marketing team members is a known problem; individual members have their own go-to fields: where one member might check TV ad; as Lead Source, another would put that in the comments field.

CMO

The CMO's most important concerns are:

- * The current solution has too many manual steps to scale with anticipated growth
- * Without more sophisticated attribution, the company will overinvest in less productive campaigns, and underinvest in better ones
- * In general, analytics integrations are manual, slow, and unreliable
- * The current system completely misses skips;-customers switching from the Unicorn app to consortium banks-an important source of revenue
- * Documenting the value of Unicorn's Marketing processes is essential to the success of the planned IPO, and millions of dollars in stock valuation hangs in the balance.

CIO

The CIO is concerned primarily with:

- * The amount of time his team spends patching up Marketing campaigns and CRM data transfers, at the expense of other, critical initiatives

* Quality and reliability of the Analytics information his team provides to Marketing **MARKETING STAFF** Marketing Operations staff concerns:

* Campaigns require so much work that they can't run as many of them as they need to

* Multi-touch cross-selling campaigns (for example, savings accounts to loans) with excellent margins, but no way to know which campaign touches perform best

* Getting swamped with manual record-keeping; for example, spreadsheet mistakes take hours to find and fix

* Poor integration with third-party tools for preparing, sending, and evaluating campaign materials, for Example.

o Webhook not firing,

o Reaching API limit

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* Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with no score; and negative levels.

Unicorn currently uses a manual and subjective process of moving Leads through the pipeline. Unicorn wants to utilize Adobe Marketo Engage for a more autonomous and effective process. The Marketing Operations team plans to set up a Revenue Cycle Model powered by key behavior such as form fills. Scoring also needs to be set up, and Marketing and Sales; nurture campaigns that reference the Model stages will be built afterward.

Unicorn needs to obtain the resources and budget to implement these projects.

Who should be involved in initial discussions before implementation begins?

* CMO, CIO, and the CRM administrator

* CMO and the Marketing department

* Marketing Ops team leader, CRM administrator, and the Web Developer

* Marketing team leaders, the CRM administrator, and the IT team

Explanation

The CMO, CIO, and the CRM administrator should be involved in initial discussions before implementation begins. The CMO and CIO are the key decision-makers who can approve the resources and budget for the projects, as well as align the business goals and strategy. The CRM administrator is the key contact for the Salesforce CRM system, which needs to be integrated with Marketo Engage for the Revenue Cycle Model and the scoring. The Marketing department and the Marketing Ops team leader are not directly involved in the initial discussions, as they are more focused on the execution and optimization of the campaigns. The Web Developer is not directly involved in the initial discussions, as they are more focused on the technical aspects of the web integrations.

NO.26 Refer to the case study.

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Unicorn and their Adobe Marketo Engage Architect want to update their current scoring for web-based behaviors. One area that is highlighted for changes are the forms. The goal is to avoid using one form score, and instead use 3 score values, depending on whether the form is low (+3); medium (+7), or high value (+15).

What is the most scalable way to build these changes?

* Update the hidden Behavioral Score fields in each form to have the appropriate ‘My Token’ score for the value of the form Make sure this triggers a Score field update as well

* Build Smart Campaigns that trigger based on the appropriate form into the Scoring Program Add the appropriate score values into the ‘Change Data Value’ flow step, then switch on

* Build Smart Campaigns that trigger based on the appropriate form into the Scoring Program Add the appropriate score value ‘My Tokens’ into the ‘Change Score1 flow step, then switch on

* Update the hidden Behavioral Score fields in each form to have the appropriate score values for the value of the form Make sure this triggers a Score field update as well

Explanation

Building smart campaigns that trigger based on the appropriate form into the scoring program and adding the appropriate score value into My Tokens; into the Change Score; flow step is the most scalable way to build these changes. This way, the score values can be easily updated and reused across different forms and programs.

Updating the hidden behavioral score fields in each form or using Change Data Value; flow steps are not scalable solutions as they require manual updates and duplication.

<https://breadcrumbs.io/blog/marketo-lead-scoring/>

NO.27 FADE IN:

CUSTOMER CONTACT ; SCORING DILEMMA

In a virtual meeting, a marketing executive in

business attire, speaks directly to the camera. The screen displays the executive's name and title (CMO).

CMO

's nice to meet you. Welcome to our growing B2B tech SaaS company. I heard you've spoken with the CIO.

Good. Listen, I have a specific concern I'd like you to evaluate.

Marketing, my team, we're really ramping up our demand generation activities. We have a lot of leads coming in and we are pushing over an increasing amount of marketing qualified leads to the inside sales team.

(shakes their head)

The volume we're pushing-inside sales is just

getting inundated, and they don't know how to prioritize or who to follow up with first. My team has a lot of data and context to send over to the sales team, but it's just too much for them to take in all at once. I don't want us to waste these opportunities. Tell me, how can I use scoring to help with this challenge we're in?

THE END

At Treat Snack Inc, a company that specializes in unique local ethnic snacks, the new CMO is being bombarded by complaints from the sales team that a high volume of MQLs are being delivered to the sales team. There is no context around why they reached MQL, what it is about them, as well as what they did that caused them to MQL. The CMO decides to overhaul the entire scoring system and build a new method from scratch.

The Sales team is interviewed to understand what indicated a good person to speak with who has a high likelihood of wanting to take a meeting. The Sales team reports that their best leads have the following traits in order of priority starting with the most helpful trait:

1. People who attended a webinar on different types of treats enjoyed in different global regions
2. People who have a title of director and higher, followed by whether the account was larger than 1000 employees
3. People who work for companies that look similar to companies that they have sold to previously

4. People who have a high interest in their chocolate tasting line of products
5. People who search the web for wholesale suppliers of gourmet treats

In which order should the different types of scoring be rolled out?

- * Predictive, Behavior Demographic, Intent, Product
- * Behavior, Demographic, Predictive, Product, Intent
- * Behavior, Intent, Demographic, Product, Predictive

Explanation

The order of the different types of scoring should be based on the priority and feasibility of the traits that the Sales team identified. Behavior scoring should be rolled out first, because it captures the most helpful trait of attending a webinar, as well as other actions that indicate interest and engagement. Demographic scoring should be rolled out next, because it captures the second most helpful trait of title and company size, as well as other attributes that indicate fit and qualification. Predictive scoring should be rolled out third, because it captures the third most helpful trait of working for similar companies, as well as other factors that indicate propensity and likelihood to buy. Product scoring should be rolled out fourth, because it captures the fourth most helpful trait of having a high interest in their chocolate tasting line of products, as well as other preferences and needs that indicate product fit and value. Intent scoring should be rolled out last, because it captures the fifth most helpful trait of searching the web for wholesale suppliers of gourmet treats, as well as other signals that indicate buying intent and readiness.

References: <https://docs.marketo.com/display/public/DOCS/Scoring+Overview>

<https://docs.marketo.com/display/public/DOCS/Best+Practices%3A+Lead+Scoring>

NO.28 Refer to the case study.

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- * In general, analytics integrations are manual, slow, and unreliable
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- * Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with **no score**; and negative levels.

Unicorn starts rebuilding out its Revenue Cycle Model (RCM) to move away from the generic Marketable model. The goal is a model that more accurately matches its customer journey. When building out the RCM, Unicorn finds that several of their **Skips** (customers who initially engage with Unicorn, but then **skip** to receive services directly from a consortium bank) seem to only appear at the Engaged phase due to scoring, before reappearing as a **Closed Won**; in their CRM.

As the CRM begins to sync back these Closed Won Opportunities, how should this journey be captured in the Revenue Cycle Model?

- * The **Skips**; should have specific stages in the success path that are the equivalent of MQL, SAL, and Opportunity, but with **Skips**; labelled.
- * Manage the **Skips**; quickly by moving them through each stage of the Success Path from engaged to

Closed Won; once identified

- * The **Skips**; should have a detour arrow above the Success Path that moves them directly from

Engaged; to **Closed Won**;

Explanation

The **Skips**; should have a detour arrow above the Success Path that moves them directly from **Engaged**; to

Closed Won; This way, the Revenue Cycle Model can capture the unique journey of these customers who bypass the normal stages of the Success Path and still generate revenue for Unicorn. The detour arrow would also allow for reporting and analysis of the **Skips**; segment and their contribution to the overall revenue. The

Skips; should not have specific stages in the success path that are the equivalent of MQL, SAL, and Opportunity, but with **Skips**; labelled, as this would create confusion and redundancy in the model. The

Skips; do not go through these stages, so they should not be assigned to them. Managing the **Skips**; quickly by moving them through each stage of the Success Path from engaged to **Closed Won**; once identified would not be a good solution, as it would distort the accuracy and integrity of the model. The **Skips**; do not follow the same criteria and behavior as the other customers who go through each stage, so they should not be treated as such.

NO.29 An Adobe Marketo Engage Architect has just hired a new person to join their team. They have been tasked with building a

new lifecycle model and you work together to develop a solution. The top half of the funnel stages (Known, Engaged, MQL) will be driven by Marketo Engage where as the bottom half of the funnel will be driven by specific data value changes in salesforce. Due to this quarter's budget reasons, there were not enough funds to subscribe to Revenue Explorer or Bizible but it will be prioritized for the next fiscal year.

Which scalable approach should the Architect choose to ensure that the lifecycle model is tracking lead stage changes accurately?

- * Build trigger logic in a program. Create a field for revenue stage and a date field for each stage to track date of entry into that field.
- * Build trigger logic in a program. Build the triggers in the Revenue Cycle Model to listen for stage changes driven by the program.
- * Build trigger logic within the Revenue Cycle Model.
- * Build a program to listen to the movement driven by the Revenue Cycle Model.

Explanation

The scalable approach that the Architect should choose to ensure that the lifecycle model is tracking lead stage changes accurately is to build trigger logic within the Revenue Cycle Model. This approach will allow the Architect to create a lifecycle model that is driven by Marketo Engage for the top half of the funnel stages and by specific data value changes in Salesforce for the bottom half of the funnel stages, without requiring an active revenue cycle model. Building trigger logic within the Revenue Cycle Model will enable the Architect to define the criteria and conditions for each stage transition, as well as to track and measure the lead movement across the funnel stages.

References: <https://docs.marketo.com/display/public/DOCS/Revenue+Cycle+Modeler>

<https://docs.marketo.com/display/public/DOCS/Revenue+Cycle+Modeler+Best+Practices>

NO.30 An Architect notices that deliverability is slowly decreasing over time. After pulling a year of reports, the Administrator notices that the number of emails per month has increased from 3 to 10. The unsubscribe rates nearly double each quarter. Per the CMO, the amount of marketing activity must remain the same.

Which two actions can the Architect take to make sure emails reach people in their database? (Choose two.)

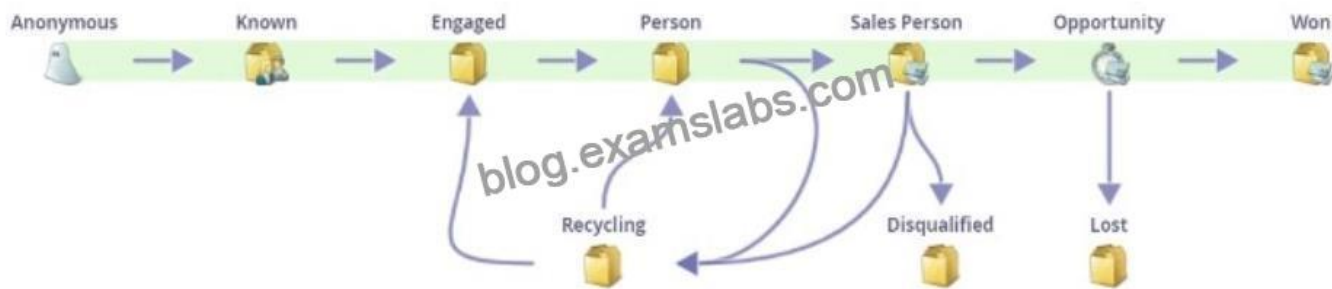
- * Make marketing emails operational so people who have unsubscribed continue to receive communications
- * Implement communication limits so people receive fewer emails
- * Work with the marketing team to decrease the number of email sends per month
- * Create a marketable smart list to include on every send that excludes multiple soft bounces
- * Decrease behavior scores when someone unsubscribes from an email

Explanation

Implementing communication limits and decreasing the number of email sends per month are two actions that can help improve deliverability by reducing email fatigue and spam complaints. Making marketing emails operational or decreasing behavior scores are not recommended as they can harm the sender reputation and engagement. Creating a marketable smart list is not relevant to the deliverability issue.

<https://experienceleague.adobe.com/docs/marketo-events/events/marketo-and-mochas/2023/deliverability-part-o>

NO.31



Refer to the lifecycle model above.

A company wants improve the efficiency of its sales follow-up and enhance its velocity reporting across the funnel. The company currently uses the out-of-box Adobe Marketo Engage success with detours modeler. The stages are defined as:

1. Anonymous: Leads whose web activity is tracked, but whose identity is not known yet
2. Known: Leads for whom we have an email address or other information that allows us to market to them
3. Engaged: Leads that have engaged us by filling out a form, clicking a link in an email, or visiting our website at least 10 times within a week
4. Lead: Leads with scores greater than 25
5. Sales Person: Leads with scores greater than 30
6. Opportunity: Leads who also have an opportunity attached to them. The Max Age is set to 7 days before it moves to Lost;
7. Won: Leads who are attached to opportunities that we have closed and Won
8. Recycling: People with scores below 25 that need to be nurtured
9. Disqualified: People who are not a fit for our products and services and we no longer want to market to them
0. Lost: People who are attached to opportunities that we have lost

Once leads reach the Sales Person stage, 50% of them do not get followed up by Sales until 7 days later. The Sales leader wants a salesperson to follow up with leads within 4 days.

Which two modifications should the Adobe Marketo Engage Consultant make to the lifecycle model to achieve these goals? (Choose two.)

- * Modify the Opportunity stage and update the Max Age from 7 days to 4 days
- * Add an additional stage between Opportunity and Won. Set type to SLA and set Max Age to 3 days
- * Add an additional stage between Sales Person and Opportunity. Set type to SLA and set Max Age to 3 days

- * Modify the Sales Person's stage from Type: Gate to Type: SLA and set Max Age to 4 days
- * Modify the Sales Person's stage from Type: Inventory to Type: SLA and set Max Age to 4 days

Explanation

The two modifications that the Adobe Marketo Engage Consultant should make to the lifecycle model to achieve these goals are to add an additional stage between Sales Person and Opportunity; and to modify the Sales Person stage from Type: Gate to Type: SLA. These modifications will help the company to improve the efficiency of its sales follow-up and enhance its velocity reporting across the funnel, as well as to ensure that a salesperson follows up with leads within 4 days. Adding an additional stage between Sales Person and Opportunity;

Opportunity; will enable the Consultant to create a separate stage for leads that are being worked by Sales but have not yet become opportunities, as well as to measure the conversion rate and velocity of this stage.

Setting type to SLA and setting Max Age to 3 days for this stage will enable the Consultant to define a service level agreement (SLA) between Marketing and Sales, as well as to monitor and measure the compliance and performance of Sales. Modifying the Sales Person stage from Type: Gate to Type: SLA will enable the Consultant to specify the maximum time that a lead can stay in the Sales Person stage before it is moved to another stage or marked as non-compliant. Setting Max Age to 4 days for this stage will enable the Consultant to align with the Sales leader's goal of following up with leads within 4 days.

References: <https://docs.marketo.com/display/public/DOCS/Revenue+Cycle+Modeler>

<https://docs.marketo.com/display/public/DOCS/Revenue+Cycle+Modeler+Best+Practices>

NO.32 An Adobe Marketo Engage Architect needs to build a subscription center that contains an option to pause notifications for 30 days; to dissuade people from unsubscribing. If a person fills out the form and selects this feature, Marketing wants to Marketing Suspend them for 30 days and subtract five points from the lead.

Existing records whose notifications are currently paused should be excluded from the flow to avoid double processing.

Which order of steps is required to build this program?

- * Remove from Flow (Existing) > Change data value > Change Score > Wait > Change data value
- * Remove from Flow (Existing) > Change Score > Wait > Change data value > Change data value
- * Change data value > Remove from Flow (Existing) > Change Score > Wait > Change data value
- * Change Score > Change data value > Wait > Change data value > Remove from Flow (Existing)

Explanation

The order of steps required to build this program is to remove from flow (existing), change data value, change score, wait, and change data value. These steps will allow the program to build a subscription center that contains an option to pause notifications for 30 days; to dissuade people from unsubscribing, and to perform the desired actions for the leads who select this feature. The remove from flow (existing) step will exclude existing records whose notifications are currently paused from the flow to avoid double processing. The change data value step will update the Marketing Suspended field to true for the leads who select this feature.

The change score step will subtract five points from the lead score for the leads who select this feature. The wait step will pause the flow for 30 days for the leads who select this feature. The change data value step will update the Marketing Suspended field to false for the leads who select this feature after 30 days.

References: <https://docs.marketo.com/display/public/DOCS/Subscription+Center>

<https://docs.marketo.com/display/public/DOCS/Remove+from+Flow>

<https://docs.marketo.com/display/public/DOCS/Change+Data+Value>

<https://docs.marketo.com/display/public/DOCS/Change+Score>

<https://docs.marketo.com/display/public/DOCS/Wait>

NO.33 Refer to the case study.

UNICORN FINTECH COMPANY PROFILE

Unicorn Fintech is a mobile-only financial-services startup created by a consortium of consumer banks to resell savings, checking, loan, transfer/remittance, and other services from a secure smartphone app. The company is venture-funded, and plans to reach profitability before a planned IPO in two years.

Business issues and requirements

Marketing is responsible for acquiring new customers through online, television advertising, and email campaigns, and for cross-selling new services to customers through IM, email, and in-app campaigns.

Evaluating the success of these campaigns has been a persistent problem: although the company can track revenue by product line, it can't attribute those revenues to campaigns: for example, did a new loan come from onboarding a new customer, or by cross-selling a savings-account customer? Marketing currently uses crude, manual tools and guesswork to evaluate the quality and lifespan of new leads, and even the deliverability of emails in its external campaigns. As a result, the department can't allocate spending to the most productive campaigns, or decide how much different touchpoints in multi-stage campaigns contribute to revenue. Operational processes to connect lead data to CRM and other databases are entirely manual.

Staffing and leadership

Unicorn has fewer than 200 employees, and roles aren't always defined in traditional ways. Since customer acquisition and cross-selling are primarily through electronic channels, Marketing and IT roles especially often overlap. The traditional Sales role falls entirely to Marketing, and IT is responsible for the Salesforce CRM system, Google Analytics, and a handful of third-party integrations. The CMO and CIO work closely together on most initiatives, and budgets are typically project-driven rather than fixed annually. Individual contributors to Marketing campaigns include the Marketing Operations Manager, responsible for lead scoring and analytics. Key IT contacts include the CRM Administrator and Web Developer. Incidental contributors are the Corporate Attorney, who signs off on opt-in/out and DMARC policies.

Revenue sources

Unicorn earns commissions on financial services delivered by the banking consortium through its apps, including fixed finders' fees for what the company calls "skip-customers" who initially engage with Unicorn, but then skip to receive services directly from a consortium bank. Unicorn needs to attribute revenue from these customers to its own campaigns; currently, it's impossible to attribute ROI to individual campaigns, or provide documentation to claim commissions on skip. Current and aspirational marketing technology Current Marketing technology consists of Marketable, an open-source lead management solution supported by a set of spreadsheets and scripts developed in-house. Marketable offers lead tracking and source attribution, but not multi-touch source attribution. Unicorn Fintech Marketing has difficulty linking the different stages of customer campaign journeys, and relies on scripts to translate Marketable's sales alerts into next steps it could use in multi-touch campaigns. IT has worked out scripts to input Marketable qualified leads into Salesforce, but the system is brittle and often requires manual intervention.

Current campaign management processes

A typical email campaign:

- * Addresses a purchased (for customer acquisition) or in-house (for cross-sell) list. Purchased lists range from 300,000 to 1.5 million addresses
- * Is sent from multiple data centers in the US and Canada
- * Includes an unsubscribe; opt-out below the message
- * Is static; there are no formula fields
- * Uses no deliverability authentication, nor integration with any email management platform.

All campaigns to date direct respondents to a single landing page with the company's all markets; message.

More sophisticated targeting is a high priority.

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Unicorn's lead-management process follows

Marketable's out of the box; defaults: lead evaluation levels 1 through 3, lifecycle stages unqualified; and

qualified. The qualification processes are manual, and highly subjective: Marketing staff classify leads according to prospect email responses, including free-form comments. Sales; followup is by email forms prompting higher levels of engagement. The company intends to phase out Marketable and replace spreadsheets and scripts with native features of whatever solution set it adopts.

Attribution processes are binary: response to a campaign email or web visit is rated a success if it results in a sale: there is no success rating assigned to TV ads that result in web visits, for example. Cost are not allocated to individual campaigns.

The Marketing department plans to expand outreach to social media (Facebook, Twitter, Instagram, in-house and third-party financial blogs), and wants to make sure it can assess the ROI of these channels, and the overall social media program.

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Input of qualified leads from Marketable into

Salesforce is by manual cut-and-paste, assisted by scripts; inconsistency of input practices across Marketing team members is a known problem; individual members have their own go-to; fields: where one member might check TV

ad” as Lead Source, another would put that in the comments field.

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- * In general, analytics integrations are manual, slow, and unreliable
- * The current system completely misses “skips”-customers switching from the Unicorn app to consortium banks-an important source of revenue
- * Documenting the value of Unicorn’s Marketing processes is essential to the success of the planned IPO, and millions of dollars in stock valuation hangs in the balance.

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 - o Webhook not firing,
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 - * Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with “no score” and negative levels.

Unicorn Fintech is using Salesforce and Adobe Marketo Engage. They want to change their lead sync and lead routing rules for new leads that are generated through Marketo Engage forms. The Marketing Operations Manager needs to help them build new automation. Leads must reach a minimum lead score of 50 prior to being synced for Inside Sales to follow up. Prior to syncing to

Salesforce, they want to make sure that each lead has a minimum data set of lead source and country. The Inside Sales Managers in each region cannot agree on a single global process for which leads should be assigned to which Inside Sales reps once the leads are created in Salesforce. They want the flexibility to decide at the country level.

What is the most appropriate, scalable process for the Marketing Operations Manager to build?

- * Include country as a form field, use a hidden field to populate lead source, trigger the sync immediately, and assign to a country lead queue
- * Include country as a form field, use a hidden field to populate lead source, trigger the sync when the person reaches 50 points, and assign to a country lead queue
- * Use inferred data to populate the country field, use a hidden field to populate lead source, trigger the sync when the person reaches 50 points, and assign to an Inside Sales rep
- * Use inferred data to populate the country and lead source fields, trigger the sync immediately, and assign directly to the Inside Sales Managers in each region

Explanation

Including country as a form field, using a hidden field to populate lead source, triggering the sync when the person reaches 50 points, and assigning to a country lead queue is the most appropriate, scalable process for the Marketing Operations Manager to build. This way, the process ensures that each lead has a minimum data set of lead source and country, that the lead score is high enough to indicate interest and readiness, and that the lead routing is flexible enough to accommodate different regional preferences. Using inferred data to populate the country field or the lead source field would not be reliable or accurate, as inferred data can be incorrect or missing. Triggering the sync immediately would not respect the lead score threshold of 50 points. Assigning to an Inside Sales rep or an Inside Sales Manager directly would not allow for flexibility or load balancing.

Assigning to a country lead queue would allow for more control and visibility over the lead distribution

NO.34 A large global company hires a media agency to run their paid social campaigns. They use a standardized UTM structure to track paid activities, which will allow them to differentiate paid efforts versus organic efforts. For example, UTM-source=paid social, UTM-medium=facebook, UTM-campaign=:B2B-social, UTM-content=Definitive-guide-to-paid-social. Cost will be added to the Adobe Marketo Engage programs on a monthly basis. The same assets will be used across campaigns and social platforms (Twitter, Facebook, LinkedIn).

Which Marketo Engage program structure will allow the company to determine paid social effectiveness and ROI?

- * * A program in the Global Content channel will capture member success, and a program will be created for each asset regardless of the platform that drove the person to the asset
- * UTMs will be used to place people in static lists to separate out the different platforms that drove the lead
- * Cost will be added to each Global Content program
- * * A program in the Global Content channel will capture member success
- * A program in the paid social channel will capture member success and one will be created for each asset and social media campaign
- * Cost will be added to each paid social program and content program
- * * A program in the Global Content channel will capture membership but not success
- * A program in the paid social channel will capture member success
- * Each program in the social media channel will be created for each paid social campaign

* Cost will be added to paid social programs

Explanation

The requirement should be met by creating one set of channels and using a tag to determine Direct or Partner.

This will allow the company to report on the efficacy of direct marketing and investment to third-party seller/partner marketing, as well as to determine how budget should be spent the following year. Creating one set of channels will enable the company to use consistent and standardized metrics and definitions for each channel type, such as webinar, paid social, virtual event, etc. Using a tag to determine Direct or Partner will enable the company to differentiate and track the performance and ROI of each marketing channel based on whether it was executed by the company or by a third-party seller.

References: <https://docs.marketo.com/display/public/DOCS/Programs+and+Channels>

<https://docs.marketo.com/display/public/DOCS/Tags>

NO.35 Refer to the case study.

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- * Is static; there are no formula fields
- * Uses no deliverability authentication, nor integration with any email management platform.

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Marketable's out of the box; defaults: lead evaluation levels 1 through 3, lifecycle stages unqualified; and

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 - * Campaigns require so much work that they can't run as many of them as they need to
 - * Multi-touch cross-selling campaigns (for example, savings accounts to loans) with excellent margins, but no way to know which campaign touches perform best
 - * Getting swamped with manual record-keeping; for example, spreadsheet mistakes take hours to find and fix
 - * Poor integration with third-party tools for preparing, sending, and evaluating campaign materials, for Example.
 - o Webhook not firing,
 - o Reaching API limit
 - o Synchronization errors with third-party tools and Salesforce

* Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns. Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with no score; and negative levels.

The social media team at Unicorn Fintech has been running paid search, paid social, and retargeting ads for the past year. Each of these is an Adobe Marketo Engage program channel and is set up to capture program member success and cost. The newly formed Account Based Marketing team (ABM) also wants to run paid social and retargeting ads but has their own budget. They want to report on their ABM efforts and ROI of their specific programs separate from the social media team. The social media team wants to be able to see how all campaigns are performing as well as easily separate the ABM efforts.

How should the Marketo Engage Architect set up the program structure to achieve these reporting goals?

- * Use the existing paid social and retargeting channels and add ABM to the program name
- * Create new ABM channels for paid social and retargeting
- * Use the existing paid social and retargeting channels and add a tag for ABM

Explanation

Creating new ABM channels for paid social and retargeting is the best way to set up the program structure to achieve the reporting goals. This way, the ABM team can have their own channels with their own success and cost metrics, and report on their ROI separately from the social media team. The social media team can also see how all campaigns are performing by using the existing channels, and easily separate the ABM efforts by filtering by channel. Using the existing paid social and retargeting channels and adding ABM to the program name would not be a good solution, as it would not allow for separate cost and success metrics for the ABM programs. Using the existing paid social and retargeting channels and adding a tag for ABM would not be a good solution, as it would not allow for separate cost and success metrics for the ABM programs, and it would require manual tagging of each program.

NO.36 Refer to the lifecycle model above.



A company wants to increase the number of leads sent to Sales. The Sales and Marketing teams need to meet quarterly conversion rate goals. These teams use the out-of-box Adobe Marketo Engage success (only) modeler. The stages are defined as:

1. Anonymous: Leads for which web activity is tracked, but whose identity is not known yet
2. Known: Leads for which we have an email address or other information that allows us to market to them
3. Engaged: Leads that have engaged us by filling out a form, clicking a link in an email, or visiting our website at least 10 times within a week
4. Lead: Leads with scores greater than 25
5. Sales Lead: Leads with scores greater than 30

6. Opportunity: Leads that also have an opportunity attached to them

7. Won: Leads that are attached to opportunities that we have closed and Won In a meeting to discuss how to increase the amount of sales leads, someone suggests scoring leads who have clicked a link in an email with +35 points.

As the Adobe Marketo Engage Consultant, what are the effects of the lifecycle if this suggestion is implemented? (Choose two.)

- * Conversion from Lead -> Sales Lead would increase
- * Conversion from Opportunity -> Won would increase
- * Conversion from Known -> Engaged would decrease
- * Conversion from Sales Lead -> Opportunity would decrease
- * Conversion from Sales Lead -> Opportunity would increase

Explanation

The effects of the lifecycle if this suggestion is implemented are that the conversion from Lead -> Sales Lead would increase and the conversion from Sales Lead -> Opportunity would decrease. This is because scoring leads who have clicked a link in an email with +35 points would make them jump from Known to Sales Lead in one step, bypassing the Engaged and Lead stages. This would increase the number of leads sent to Sales, but it would also decrease the quality and readiness of those leads, as they may not be truly interested or qualified for the product or service. This would result in lower conversion rates from Sales Lead to Opportunity, as well as lower sales efficiency and effectiveness.

References: <https://docs.marketo.com/display/public/DOCS/Success+Path+Analyzer>

<https://docs.marketo.com/display/public/DOCS/Best+Practices%3A+Lead+Scoring>

NO.37 A company wants to generate new leads through content syndication. The goal is not to pay for existing leads.

A third-party company will send leads through an API directly to the Adobe Marketo Engage instance.

The third-party company passes the following information through the API:

- * First
- * Last
- * Email
- * Person Source
- * Company
- * Asset Name

An Architect needs to create a program that captures leads and evaluates if the leads are new or existing.

Engagement will also be captured on all leads. Only new leads must be scored and sent a welcome email.

Existing leads will then be excluded from the program and sent back through the API to the third-party company.

Which order of steps is required to build this program?

- * Remove from Flow > Change Data Value > Add to Program > Change Score > Call Webhook

- * Change Data Value > Change Program Status > Call Webhook > Remove from Flow > Send Email
- * Remove from Flow > Call Webhook > Change Data Value > Change Program Status > Change Score
- * Change Program Status > Call Webhook > Change Data Value > Send Email > Remove from Flow

Explanation

The order of steps required to build this program is to change data value, change program status, call webhook, remove from flow, and send email. This is because these steps will allow the program to capture leads and evaluate if they are new or existing, as well as capture engagement and perform the desired actions. The change data value step will update the person source and asset name fields based on the API information. The change program status step will update the program status based on whether the lead is new or existing. The call webhook step will send existing leads back to the third-party company through the API. The remove from flow step will exclude existing leads from the program. The send email step will send a welcome email to new leads only. The other options are not as correct as this one, because they either miss some of the required steps or include some of the unnecessary steps.

References: <https://docs.marketo.com/display/public/DOCS/Programs+Overview>

<https://docs.marketo.com/display/public/DOCS/Smart+Campaigns+Overview>

<https://docs.marketo.com/display/public/DOCS/Webhooks>

NO.38 Refer to the case study

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o Reaching API limit

o Synchronization errors with third-party tools and Salesforce

* Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with **no score**; and negative levels.

Unicorn has been having an issue with data quality coming from their Adobe Marketo Engage instance. An audit finds that a key issue is that Marketers and IT members lacked knowledge in best practice processes for the following tasks:

* Importing data to Marketo Engage or CRM in incorrect format or with old information

* Setting up forms to comply with Data Standardization (such as String Country fields to fill out)

* Importing large purchased lists without any minimal validation

Unicorn agrees with the auditor's recommendations to roll out enablement as part of a way to solve the problems.

Which two steps should be a part of this enablement? (Choose two.)

* Set up a Roles and Permissions workshop with the CMO and CIO to capture and enforce the right level of access for level of Marketo Engage usage

* Remove access to users who are the **worst offenders**; until they have successfully passed the Marketo Certified Associate Exam

* Align IT and Marketing Ops teams on what level of responsibility each team should have on data management in Marketo Engage

* Buy lists from a third-party data provider that are GDPR compliant with no country values

* Set up training sessions that covers List Import and Form best practices for both day-to-day users and Marketo Engage **Power Users**;

Explanation

Setting up training sessions that covers List Import and Form best practices for both day-to-day users and Marketo Engage **Power Users**; is a good step to be part of the enablement, as it would help the users to learn how to avoid common data quality issues and follow the best practices for importing data and creating forms.

Aligning IT and Marketing Ops teams on what level of responsibility each team should have on data management in Marketo Engage is another good step to be part of the enablement, as it would help to clarify the roles and expectations of each team and ensure a consistent and collaborative approach to data quality.

Setting up a Roles and Permissions workshop with the CMO and CIO to capture and enforce the right level of access for level of Marketo Engage usage is not a bad step, but it is not directly related to the data quality issues or the enablement of the users. Removing access to users who are the **worst offenders**; until they have successfully passed the Marketo Certified Associate Exam is not a good step, as it would be punitive and disruptive to the users' work. Buying lists from a third-party data provider that are GDPR compliant with no country values is not a good step, as it would not solve the data quality issues or improve the users' knowledge of best practices.

NO.39 An Adobe Marketo Engage Architect joins a company and needs to audit a prospect engagement scoring model. The previous administrator did not properly set up or maintain the model. The Marketing and Sales teams identify all engagement elements they want the new revamped model to score on. The administrator needs to make improvements.

According to best practices, what are the three important elements for the Architect to consider when updating the scoring model? (Choose three.)

- * Scoring tokens are in use for all scoring values in the model.
- * The scoring for all form activities happens within the individual form Programs.
- * The frequency of scoring is considered in the implementation of the model.
- * All scoring triggers are held in an operational Program in Marketing Activities.
- * Make sure only Leads are scored on this model, not the entire database.
- * A new Channel is set up for Scoring; and all Programs related to scoring use this Channel.

Explanation

The three important elements for the Architect to consider when updating the scoring model are to use scoring tokens for all scoring values in the model, to consider the frequency of scoring in the implementation of the model, and to hold all scoring triggers in an operational program in Marketing Activities. These elements will help the Architect to audit and improve the existing prospect engagement scoring model according to best practices. Using scoring tokens for all scoring values in the model will enable the Architect to easily adjust and maintain the scoring values across different campaigns and programs, instead of hard-coding them.

Considering the frequency of scoring in the implementation of the model will enable the Architect to avoid over-scoring or under-scoring leads based on their actions and behaviors, and to set appropriate time frames and limits for scoring triggers. Holding all scoring triggers in an operational program in Marketing Activities will enable the Architect to centralize and organize all the scoring campaigns and assets in one place, instead of scattering them across different folders or workspaces.

References: <https://docs.marketo.com/display/public/DOCS/Scoring+Overview>

<https://docs.marketo.com/display/public/DOCS/Best+Practices%3A+Lead+Scoring>

NO.40 Refer to the case study.

UNICORN FINTECH COMPANY PROFILE

Unicorn Fintech is a mobile-only financial-services startup created by a consortium of consumer banks to resell savings, checking, loan, transfer/remittance, and other services from a secure smartphone app. The company is venture-funded, and plans to reach profitability before a planned IPO in two years.

Business issues and requirements

Marketing is responsible for acquiring new customers through online, television advertising, and email campaigns, and for cross-selling new services to customers through IM, email, and in-app campaigns.

Evaluating the success of these campaigns has been a persistent problem: although the company can track revenue by product line, it can't attribute those revenues to campaigns: for example, did a new loan come from onboarding a new customer, or by cross-selling a savings-account customer? Marketing currently uses crude, manual tools and guesswork to evaluate the quality and lifespan of new leads, and even the deliverability of emails in its external campaigns. As a result, the department can't allocate spending to the most productive campaigns, or decide how much different touchpoints in multi-stage campaigns contribute to revenue. Operational processes to connect lead data to CRM and other databases are entirely manual.

Staffing and leadership

Unicorn has fewer than 200 employees, and roles aren't always defined in traditional ways. Since customer acquisition and cross-selling are primarily through electronic channels, Marketing and IT roles especially often overlap. The traditional Sales role falls entirely to Marketing, and IT is responsible for the Salesforce CRM system, Google Analytics, and a handful of third-party

integrations. The CMO and CIO work closely together on most initiatives, and budgets are typically project-driven rather than fixed annually. Individual contributors to Marketing campaigns include the Marketing Operations Manager, responsible for lead scoring and analytics. Key IT contacts include the CRM Administrator and WebDeveloper. Incidental contributors are the Corporate Attorney, who signs off on opt-in/out and DMARC policies.

Revenue sources

Unicorn earns commissions on financial services delivered by the banking consortium through its apps, including fixed finders' fees for what the company calls 'skip-customers who initially engage with Unicorn, but then skip to receive services directly from a consortium bank. Unicorn needs to attribute revenue from these customers to its own campaigns; currently, it's impossible to attribute ROI to individual campaigns, or provide documentation to claim commissions on skip. Current and aspirational marketing technology Current Marketing technology consists of Marketable, an open-source lead management solution supported by a set of spreadsheets and scripts developed in-house. Marketable offers lead tracking and source attribution, but not multi-touch source attribution. Unicorn Fintech Marketing has difficulty linking the different stages of customer campaign journeys, and relies on scripts to translate Marketable's sales alerts into next steps it could use in multi-touch campaigns. IT has worked out scripts to input Marketable qualified leads into Salesforce, but the system is brittle and often requires manual intervention.

Current campaign management processes

A typical email campaign:

- * Addresses a purchased (for customer acquisition) or in-house (for cross-sell) list. Purchased lists range from 300,000 to 1.5 million addresses
- * Is sent from multiple data centers in the US and Canada
- * Includes an unsubscribe/opt-out below the message
- * Is static; there are no formula fields
- * Uses no deliverability authentication, nor integration with any email management platform.

All campaigns to date direct respondents to a single landing page with the company's all markets message.

More sophisticated targeting is a high priority.

Current lead management and attribution

Unicorn's lead-management process follows

Marketable's out of the box defaults: lead evaluation levels 1 through 3, lifecycle stages unqualified; and

qualified. The qualification processes are manual, and highly subjective: Marketing staff classify leads according to prospect email responses, including free-form comments. Sales followup is by email forms prompting higher levels of engagement. The company intends to phase out Marketable and replace spreadsheets and scripts with native features of whatever solution set it adopts.

Attribution processes are binary: response to a campaign email or web visit is rated a success if it results in a sale: there is no success rating assigned to TV ads that result in web visits, for example. Cost are not allocated to individual campaigns.

The Marketing department plans to expand outreach to social media (Facebook, Twitter, Instagram, in-house and third-party financial blogs), and wants to make sure it can assess the ROI of these channels, and the overall social media program.

Current governance processes

Currently, the Marketing department assigns content development and campaign management duties to team members on a campaign-by-campaign basis. All team members (and IT) have access to all assets and tools, which sometimes leads to duplication and conflicts. The CMO realizes that a more specialization will be necessary to support the social media campaigns, but hasn't decided on the optimal organizational model.

Input of qualified leads from Marketable into

Salesforce is by manual cut-and-paste, assisted by scripts; inconsistency of input practices across Marketing team members is a known problem; individual members have their own 'go-to' fields: where one member might check 'TV ad' as Lead Source, another would put that in the comments field.

CMO

The CMO's most important concerns are:

- * The current solution has too many manual steps to scale with anticipated growth
- * Without more sophisticated attribution, the company will overinvest in less productive campaigns, and underinvest in better ones
- * In general, analytics integrations are manual, slow, and unreliable
- * The current system completely misses 'skips'-customers switching from the Unicorn app to consortium banks-an important source of revenue
- * Documenting the value of Unicorn's Marketing processes is essential to the success of the planned IPO, and millions of dollars in stock valuation hangs in the balance.

CIO

The CIO is concerned primarily with:

- * The amount of time his team spends patching up Marketing campaigns and CRM data transfers, at the expense of other, critical initiatives
- * Quality and reliability of the Analytics information his team provides to Marketing MARKETING STAFF Marketing Operations staff concerns:
 - * Campaigns require so much work that they can't run as many of them as they need to
 - * Multi-touch cross-selling campaigns (for example, savings accounts to loans) with excellent margins, but no way to know which campaign touches perform best

- * Getting swamped with manual record-keeping; for example, spreadsheet mistakes take hours to find and fix
- * Poor integration with third-party tools for preparing, sending, and evaluating campaign materials, for Example.
 - o Webhook not firing,
 - o Reaching API limit
 - o Synchronization errors with third-party tools and Salesforce
- * Inadequate number of lead stages and qualification levels, making it difficult to evaluate lead value, especially in multi-touch campaigns Despite the absence of an external Sales team, Marketing Operations would like to improve the granularity of their lead tracking, including both lifecycle stages and quality levels, with $\&\#8220$;no score $\&\#8221$; and negative levels.

Unicorn Fintech plays a key role in a subset of applications for loans that happen at Consortium Banks. The Unicorn Marketing Operations team has the ability to integrate with these banks to pull this application data into Adobe Marketo Engage so they can automate their involvement in this process. They have discussed this data integration with their legal team, and it has been approved. Based on this, Unicorn decides to proceed with this integration and wants to pull all available data in because other Marketo Engage campaigns can be run in the future to this audience. Part of the initial requirements of this process include Unicorn emailing the customer if they reach a certain stage in the application process. Only certain customers will be added to this stage, so only those customers can be contacted by Unicorn as part of this initial process.

How should this information be stored in Marketo Engage?

- * Push each record to a Program if they meet the right loan stage criteria
- * Store the data in custom fields on the person record
- * Create a Custom Object linked to the person record
- * Create a Custom Activity linked to the person record

Explanation

Creating a Custom Object linked to the person record is the best way to store the information in Marketo Engage. This way, the data can be stored in a structured and scalable way, without cluttering the person record with too many custom fields. The Custom Object can also be used to trigger smart campaigns based on the loan stage criteria. Pushing each record to a Program if they meet the right loan stage criteria would not store the data in Marketo Engage, but only associate the record with a Program. Storing the data in custom fields on the person record would not be efficient or scalable, as there might be many fields and values to store for each loan application. Creating a Custom Activity linked to the person record would not allow for triggering smart campaigns based on the loan stage criteria, as Custom Activities are only available for segmentation and reporting.

NO.41 An Adobe Marketo Engage Consultant is assigned to audit an existing Marketo Engage instance. The instance is 2 years old and follows a de-centralized model for program execution. Therefore, all marketers within the organization have been trained to operate and build in the Marketo Engage instance independently. During the audit, the consultant discovers:

1. Naming convention does not exist. Therefore, all program names are named arbitrarily.
2. There are four Marketo Engage Admins: The marketing operations manager, the demand generation manager, the CRM administrator, and the IT manager. All four admins have access to everything and have been creating fields on their own to fit individual business needs.
3. There is one workspace for the entire instance. However, the company has paid for additional workspaces.

4. There are two Revenue Lifecycle Models: a prospect lifecycle and a customer lifecycle.

The CMO wants to prioritize the following goals:

1. Ability to pull quick reports for prospect programs and customer programs from a reporting tool like Tableau.
2. Change the operating model from de-centralized to centralized so the marketing operations manager and CRM administrator are the only two people managing the operational side of the Marketo Engage instance and a new agency will manage the campaign execution on the behalf of marketing.

Which three recommendations should the Consultant make? (Choose three.)

- * Create a folder structure to organize customer vs prospect campaigns
- * Create two workspaces: A prospect workspace and a customer workspace
- * Create a naming convention that tags customer vs prospect campaigns
- * Reduce the access for the demand generation manager and IT manager to a limited role that cannot create fields
- * Create two workspaces: An operational workspace and a marketing workspace
- * Increase the access for the marketing operations manager and CRM administrator to super admin so they can override the field creations from others

Explanation

The three recommendations that the Consultant should make are to create two workspaces: A prospect workspace and a customer workspace, to create a naming convention that tags customer vs prospect campaigns, and to reduce the access for the demand generation manager and IT manager to a limited role that cannot create fields. These recommendations will help the company to achieve their goals of pulling quick reports for prospect programs and customer programs from a reporting tool like Tableau, and changing the operating model from de-centralized to centralized. Creating two workspaces: A prospect workspace and a customer workspace will enable the company to segment and organize their programs based on their target audience, as well as to leverage their existing workspaces feature. Creating a naming convention that tags customer vs prospect campaigns will enable the company to standardize and identify their programs based on their purpose, as well as to facilitate reporting and analysis. Reducing the access for the demand generation manager and IT manager to a limited role that cannot create fields will enable the company to centralize and control their field management process, as well as to avoid field duplication or inconsistency.

References: <https://docs.marketo.com/display/public/DOCS/Workspaces+and+Partitions>

<https://docs.marketo.com/display/public/DOCS/Naming+Conventions>

<https://docs.marketo.com/display/public/DOCS/Roles+and+Permissions>

NO.42 An Adobe Marketo Engage Consultant is assigned to audit an existing Marketo Engage instance. This is a

10-year-old instance. Due to high turnover within the Marketing Operations team, the team does not have the MQL assignment process documented. Marketing Operations does not have access to Salesforce. The sales team reports that they receive only 10 MQLs in a week. The Marketing team shows on average 50 MQLs in a week. The Sales team members do not get any MQL alert from Marketo Engage. They see the lead assignment only when the leads are assigned to `Sales Queue`; on Salesforce. The Marketo Engage sync on Salesforce is properly configured and has write access to all standard objects and fields. While auditing Marketo Engage instance, the consultant finds the following issues:

- * An average 40 leads are getting graduated to MQLs but not syncing with Salesforce. These records are already in Salesforce's lead object and belong to Hospitality Industry.
- * The web-message field on the Marketo Engage form is not getting updated to Salesforce's Lead and Contact objects. The

Marketo Engage Sync user has read and write access to `Web-Message` field on Lead, Contact, and Account objects.

Which two steps should the consultant perform to find the root cause? (Choose two.)

- * Check if Marketo's Custom Object is in place
- * Check if the Web-Message form field is mapped to Account object
- * Check if the Custom Activities are configured properly
- * Check if the Behavior Scoring is configured properly
- * Check if the Custom Sync Rule is in place

Explanation

The two steps that the consultant should perform to find the root cause are to check if the Web-Message form field is mapped to Account object and to check if the Custom Sync Rule is in place. These steps will help the consultant to identify and resolve the issues that are causing leads not syncing with Salesforce or fields not getting updated. Checking if the Web-Message form field is mapped to Account object will help the consultant to verify that the field mapping is correct and consistent between Marketo Engage and Salesforce, as well as between Lead, Contact, and Account objects. Checking if the Custom Sync Rule is in place will help the consultant to verify that there are no filters or conditions that are blocking leads from syncing with Salesforce based on their industry or other criteria.

References: <https://docs.marketo.com/display/public/DOCS/Salesforce+Sync%3A+Overview>

<https://docs.marketo.com/display/public/DOCS/Field+Mapping>

<https://docs.marketo.com/display/public/DOCS/Custom+Sync+Filter>

NO.43 A company buys a webinar solution that connects to its Adobe Marketo Engage instance via API. The Marketing VP wants to quickly scale the volume of webinars from once a month for North America to three times a month globally. All webinars will be in English. The company markets to three different regions, and the content of all assets such as the landing page and emails need the option to vary the content for different combinations of region and industry.

The Marketing VP wants to see the results of each webinar reported at the global level. The Demand Generation Manager wants to see the results of each webinar reported at the regional level.

Which two actions should the Marketo Engage Architect recommend to meet these requirements? (Choose two.)

- * Create a webinar email asset in the program template that uses Velocity Scripting to populate region and industry
- * Create a webinar email template with program tokens to populate content by region and industry
- * Create a regional webinar program template with a consistent naming convention
- * Create a global webinar program template that contains each region's local assets when it is cloned
- * Create a webinar email template with snippets to populate content by region and industry

Explanation

The two actions that the Marketo Engage Architect should recommend to meet these requirements are to create a webinar email asset in the program template that uses Velocity Scripting to populate region and industry and to create a regional webinar program template with a consistent naming convention. These actions will help the Architect to quickly scale the volume of webinars from once a month for North America to three times a month globally, as well as to vary the content of assets for different combinations of region and industry. Creating a webinar email asset in the program template that uses Velocity Scripting to populate region and industry will enable the Architect to dynamically insert content based on the lead's region and industry segmentation fields, instead of creating separate email assets for each segment. Creating a regional webinar program template with a consistent naming convention will enable the Architect to easily clone and customize the program for each region, as well as to report on the results of each webinar at the global and regional level.

References: <https://docs.marketo.com/display/public/DOCS/Webinar+Programs>

<https://docs.marketo.com/display/public/DOCS/Velocity+Scripting>

<https://docs.marketo.com/display/public/DOCS/Program+Templates>

NO.44 The marketing team at a multinational company needs to better understand their marketing effectiveness. The team is planning for the next fiscal year and must decide how to allocate budget to the various marketing channels. Spending must be cut by \$1,000,000. The team needs to decide what they are not going to do next year. By using program analyzer, extracting the information, and populating an Excel sheet, the team is able to analyze the following data.

	Cost	FT Pipeline	Ft Pipeline/C	MT Pipeline	MT Pipeline/Cost
Webinars	\$500,000	\$1,500,000	3	\$10,000,000	20
Paid Social	\$1,000,000	\$2,000,000	2	\$4,000,000	4
Tradeshows	\$2,000,000	\$12,000,000	6	\$10,000,000	5

Based on the data from this year’s marketing metrics, which conclusion can be made to help make decisions for next year?

- * Tradeshows returns the greatest ROI for acquiring new names, and webinars return the greatest ROI for engaging people down the funnel. Due to paid social performance, the marketing team decides to cut back on spend by \$1 million and opts not to do any paid social campaigns.
- * Paid social is performing the best on average for both acquiring new names and engaging with people down the funnel to generate pipeline. The team needs to cut \$333,333 in each channel to spread out the cutbacks.
- * Webinars provide the best ROI for acquiring new names because of the low cost. Tradeshows provide the least ROI because of the high cost. To help the company save money without sacrificing returns, they need to cut Tradeshows by \$1 million.

Explanation

The conclusion that can be made based on the data from this year’s marketing metrics is that webinars provide the best ROI for acquiring new names because of the low cost, and tradeshows provide the least ROI because of the high cost. To help the company save money without sacrificing returns, they need to cut tradeshows by

\$1 million. This conclusion can be derived from analyzing the data in terms of cost per acquisition (CPA), return on investment (ROI), and budget allocation. Webinars have the lowest CPA (\$10) and the highest ROI (900%) among all channels, which means they are the most efficient and effective way to acquire new names.

Tradeshows have the highest CPA (\$100) and the lowest ROI (100%) among all channels, which means they are the least efficient and effective way to acquire new names. Tradeshows also have the largest budget allocation (\$1 million) among all channels, which means they are consuming a lot of resources without generating much value. Therefore, cutting tradeshows by \$1 million will help the company reduce costs and increase returns.

References: <https://docs.marketo.com/display/public/DOCS/Program+Analyzer>

<https://docs.marketo.com/display/public/DOCS/Program+ROI>

Adobe AD0-E556 Exam Syllabus Topics:

TopicDetailsTopic 1- Review an existing implementation and provide findings- Review an existing implementation, recommend actions to scale campaign executionTopic 2- Evaluate an audit and recommend priorities and timeline- Explain the applicability of workspace and partitions for a given scenarioTopic 3- Identify and describe the pros and cons of different attribution models- Evaluate a customer's implementation and recommend actions to improve deliverabilityTopic 4- Given a business need, identify the different behaviors for scoring- Illustrate how to validate Marketo Engage reporting in tracking lifecycle changesTopic 5- Identify the different types of integrations and when to use them- Gather information about a client's implementation and recommend security practicesTopic 6- Identify metrics to use in a given report type- Evaluate a customer's implementation and recommend actions to improve administration managementTopic 7- Identify how to track multi-channel attribution to evaluate ROI- Evaluate a set of requirements and recommend project boundaries, budget, resources, and scopeTopic 8- Outline an operational procedure for lead routing multiple countries- Appraise a set of requirements and recommend an approach to campaign logicTopic 9- Given a set of requirements, recommend an efficient data schema- Given a modified process, determine who needs enablement and efficient enablement rollout planTopic 10- Given a model to review, explain the concept of detours in the lifecycle modeler- Gather requirements- needs and recommend a lead management and lifecycle design

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