

# Marketing Rockstar's Guide to Marketo

## Chapter 1. Getting Help

### At a Glance

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## Overview

Before we get any further, let me show you the other resources available to you online. Marketo does have extensive resources online for customers only. These include self-help documentation, advice, and training. You can also leverage the collective Marketo mind by asking questions on the Community. For those tough technical issues, there is always Marketo Support. Let's go through each of these areas in more detail.

## Marketo Community

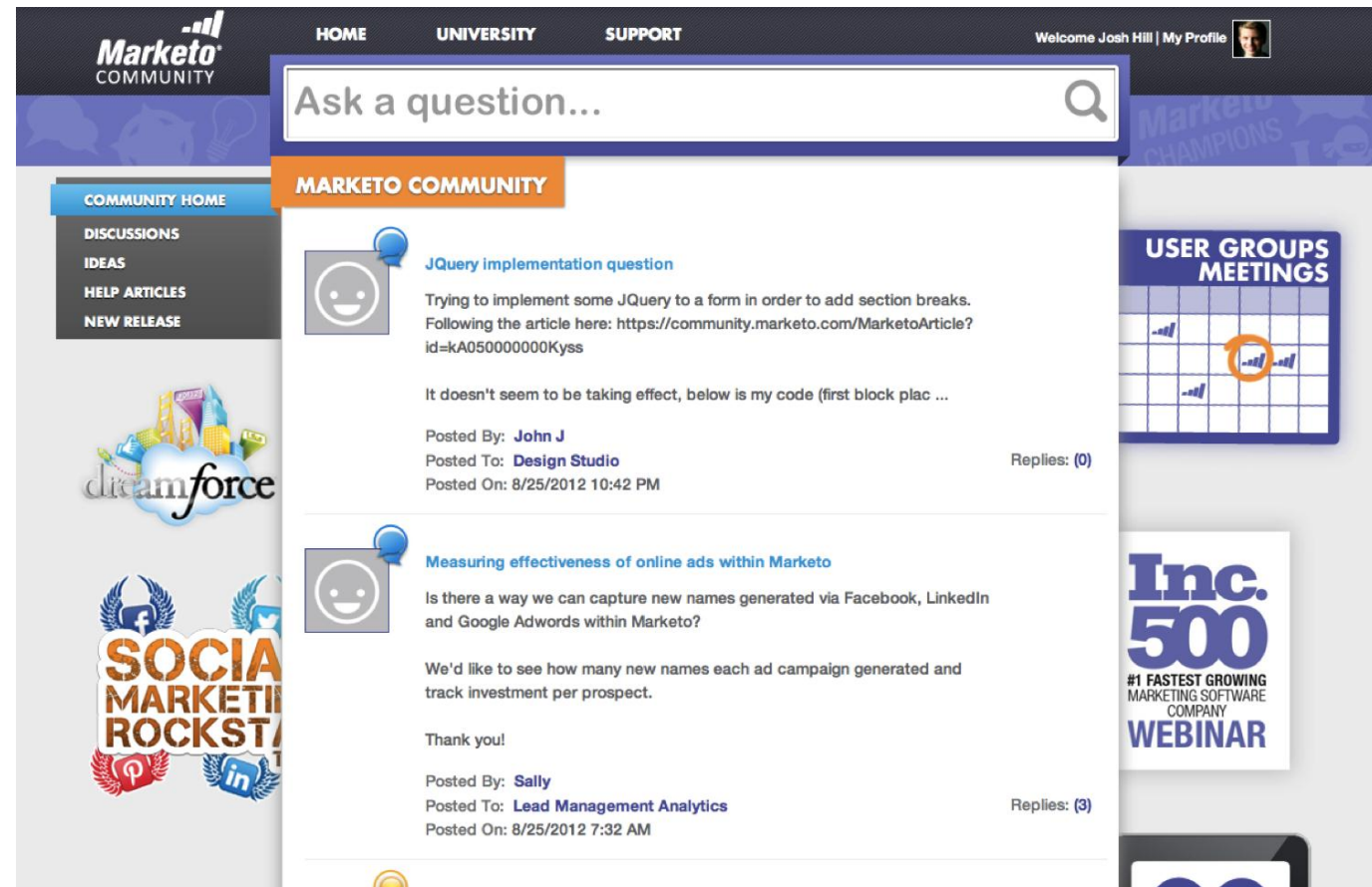
This is by and large the best resource (other than this guide!) for help in using Marketo. The Community is a friendly place to meet users of all levels as well as employees. You can ask questions and hear from experienced users and staff on ways to handle a situation.

The Community also contains Help Files and Official Documentation along with Release Notes as Marketo adds new features.

The Community is your access point for Support Cases.

Let's walk through the Community

## Home



Whenever you press Community or Help in the main Marketo console, you will find yourself here. The default view is to show the latest Discussions or Ideas. Feel free to join in!

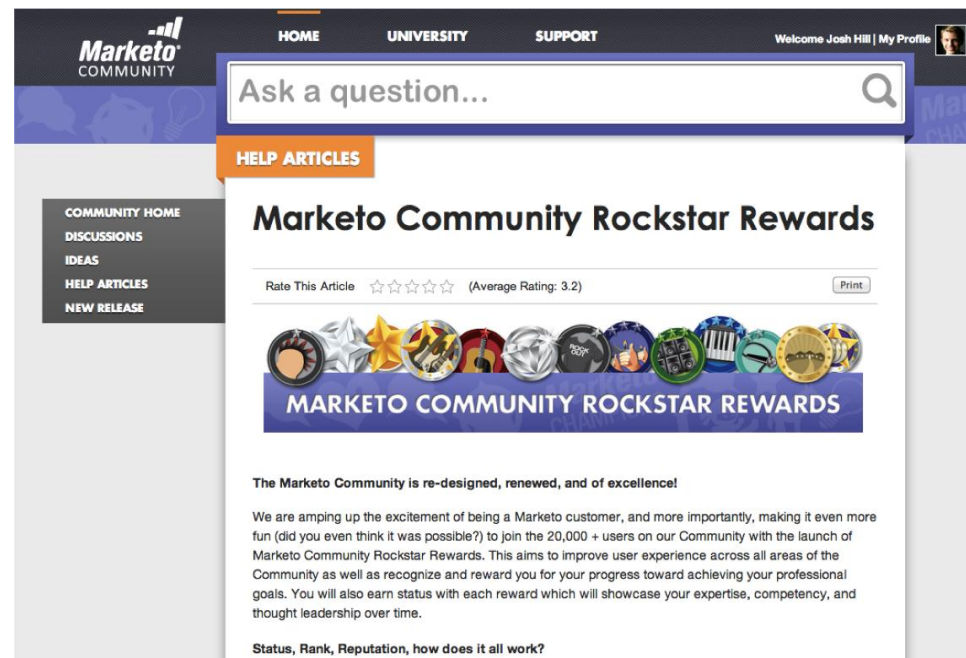
Here is a quick overview of what you see on the screen as of mid-2012:

- Top Navigation: Home, Support (use this to open a case), and University (training materials).
- Big Search Box: go ahead, ask what you've always wanted to know!
- Left Nav: fast links around and Marketo promotions.

- Right Nav: User Group Schedule and promotions

## New in August 2012: Rockstar Rewards!

Marketo just added [Rockstar Rewards](#) to enhance the experience as well as provide incentives for everyone to answer and ask questions and post Ideas. You start at Beginner and can climb the ranks to Diamond Level and expert World Tour User. It's very cool and possibly will involve special rewards from Marketo.



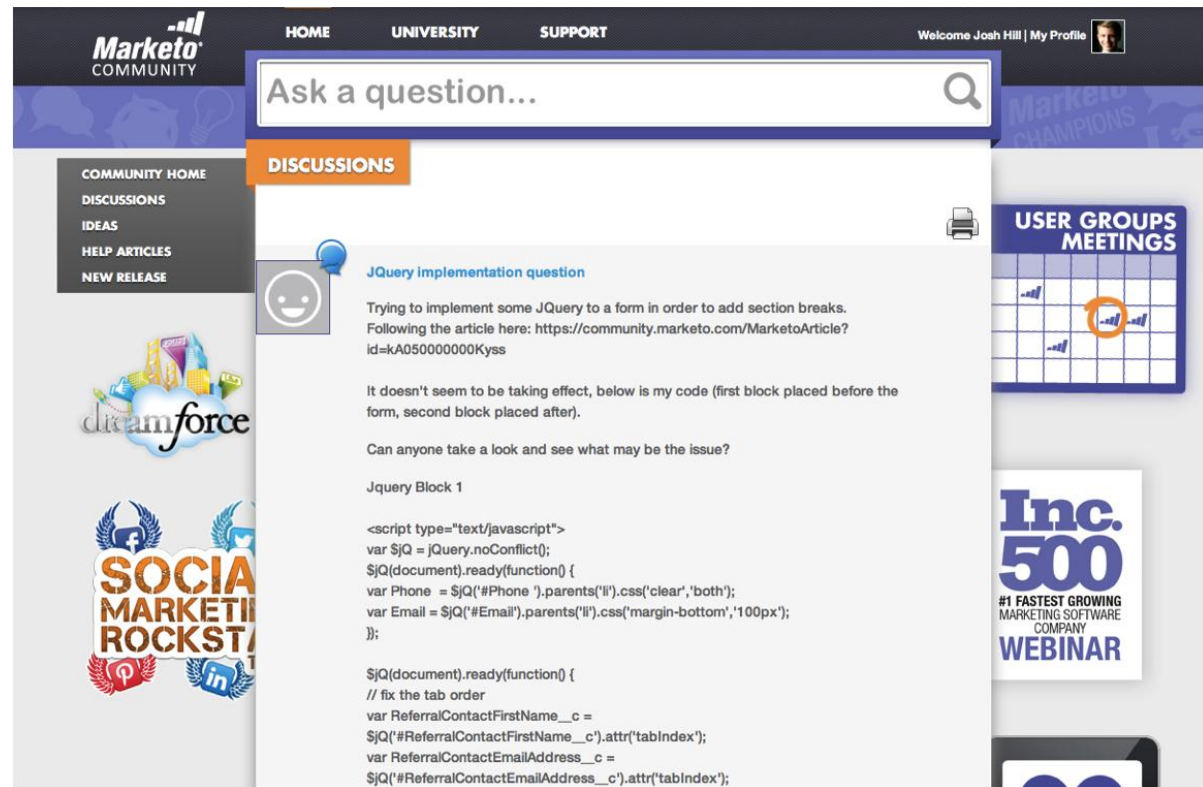
Click on My Profile to see your current rank and points.



Quite a few people outrank me!

## Ask a Question

The big bar that says “Ask a Question” is your friend. It auto populates just like Google does. The Search will then bring up relevant Discussions, Ideas, and Help Articles (documentation). Please do this first, before posting an Idea or Discussion. There’s a good chance someone asked or answered what you had in mind.



## Discussions



**Pro Tip:** search Ask a Question before you post. Most common questions have already been answered.

The greater part of the Community is here asking and answering questions. This is the cutting edge of making Marketo work for your business.

Click on Discussions to see a list of recent discussions. This is like a forum where Marketo users ask questions ranging from Newbie to Programming API stuff.

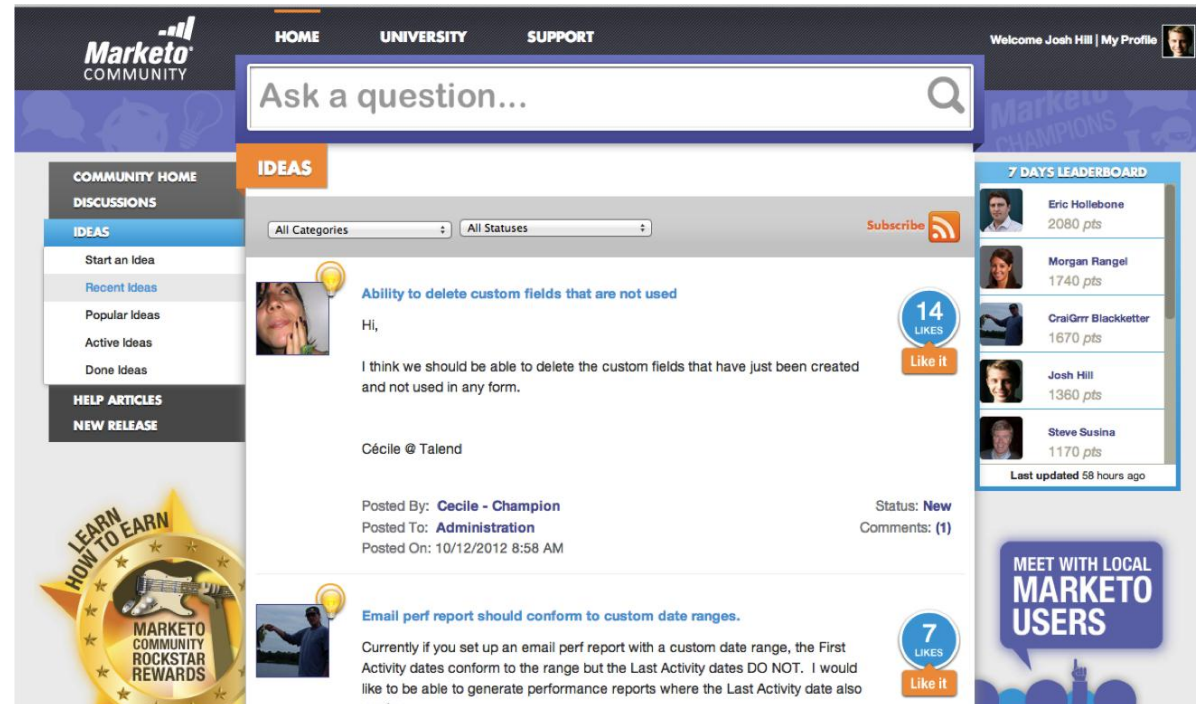
You can use the Categories bar to find specific areas, including Job Postings.

Use the RSS Feed to subscribe to All or certain Discussions.

Looking for a gig? Use the selector to find Job Opportunities.

## Ideas

Click on Ideas. Ideas are denoted by a lightbulb icon and the “Like Counter” icon.

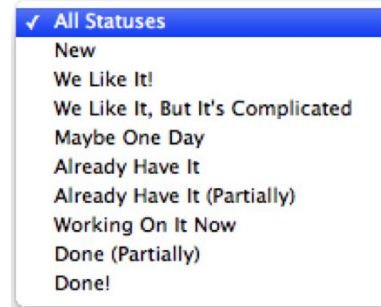


If you like an idea you see, press **Like** It to add your voice.

If you want to add a comment, you can click on the Idea just like a Discussion. You can also Add a New Idea or Subscribe to the RSS Feed.

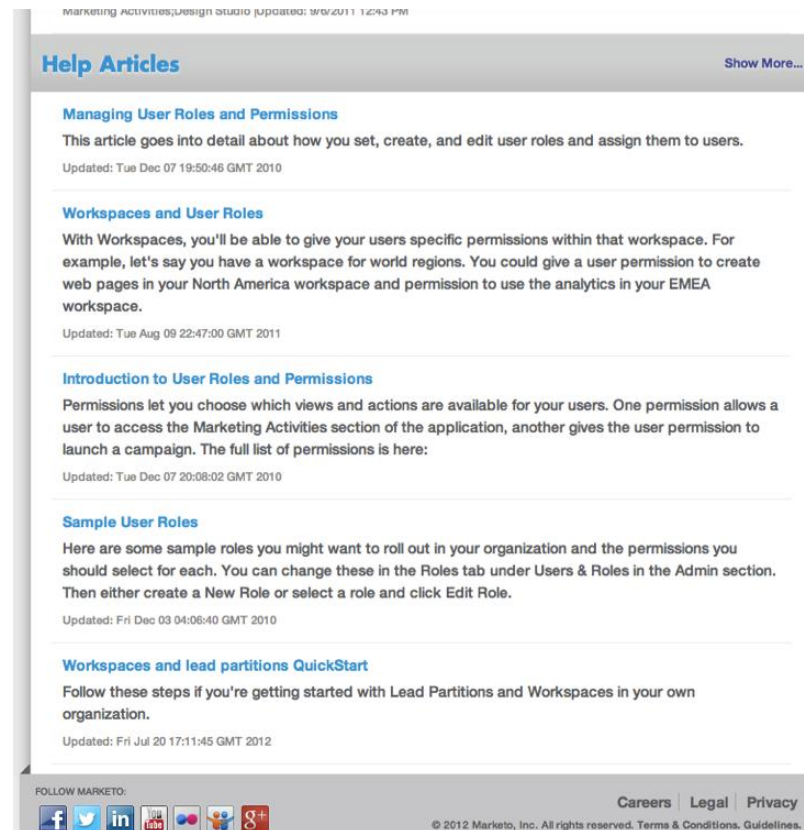
Marketo Employees review each Idea and decide if they will implement it, which helps give users some sense of when the Idea will become a real feature. Sometimes Ideas end up in the **Treasure Chest** during testing. Check back with your ideas to see how Marketo views them:





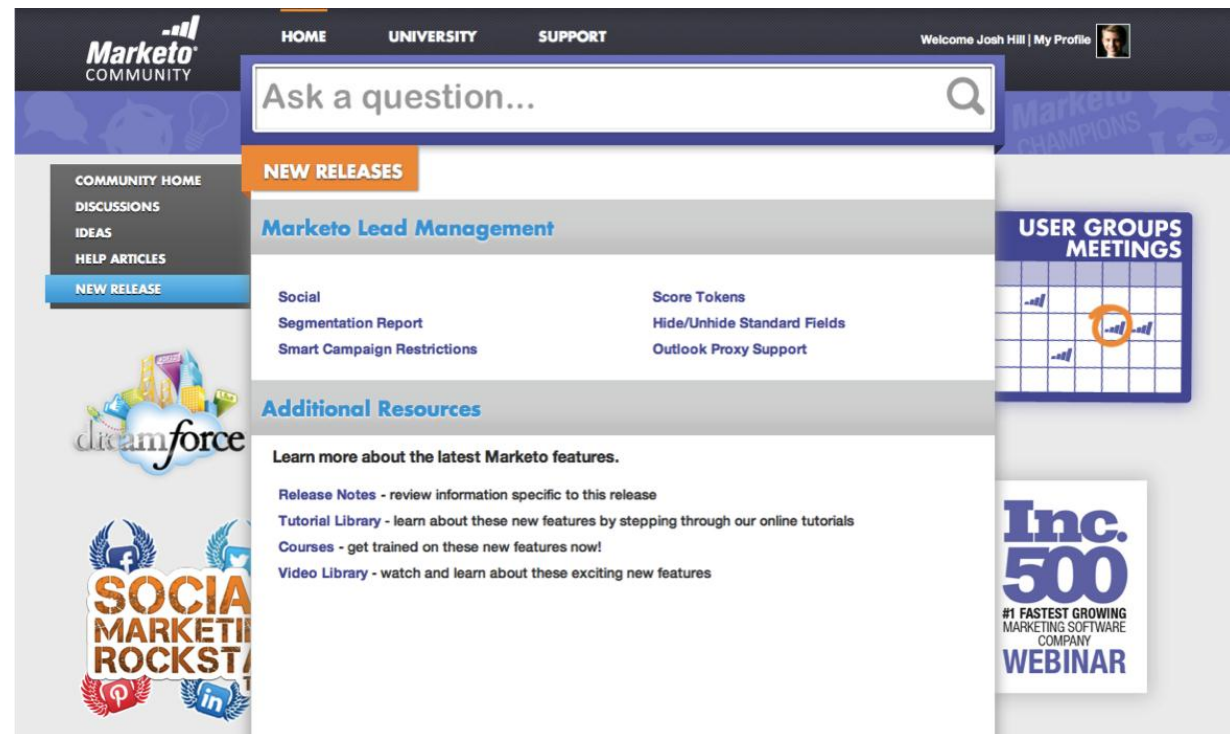
## Help Articles

Help Articles include the official documentation written by my friends in Education at Marketo. The documents include best practices, feature uses, and common situations. I often refer to these articles throughout this Guide in case you want to review the original Marketo article.



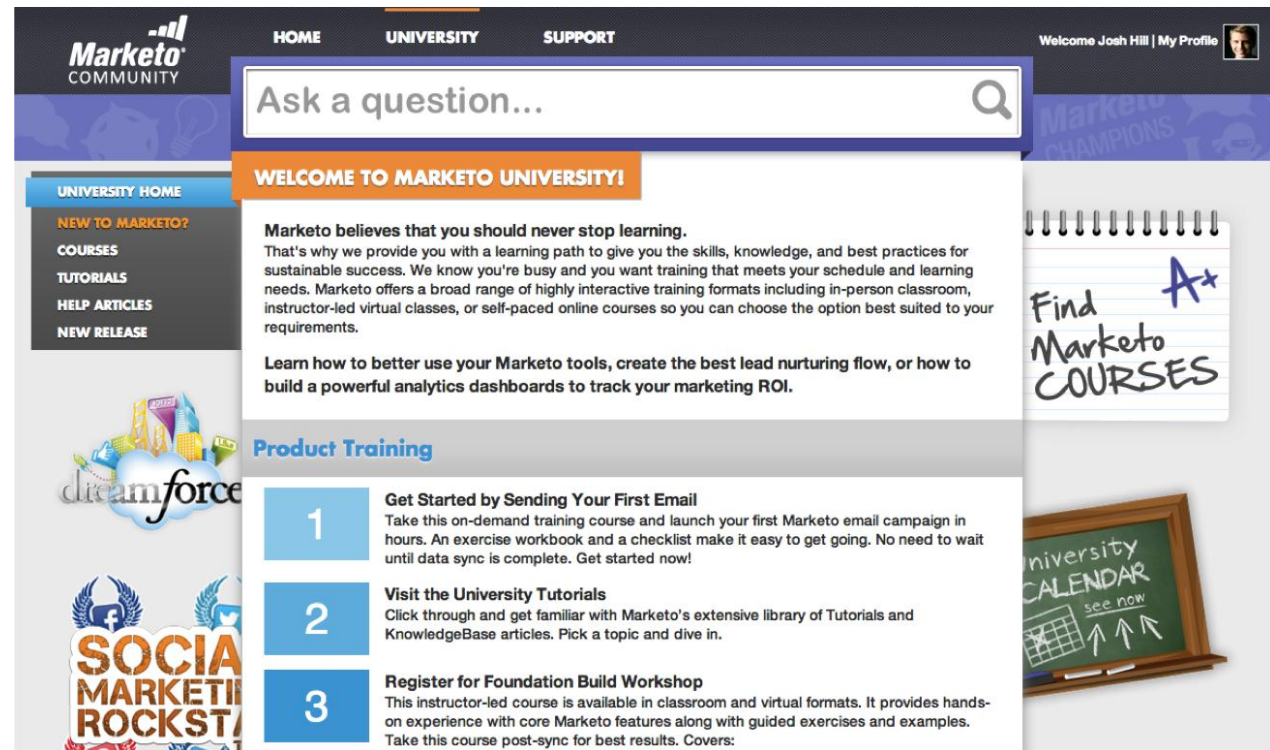
## New Release

This section has announcements on New Releases of features as well as organizes documentation on recently added features. Check here about once a quarter for new things to do with Marketo.



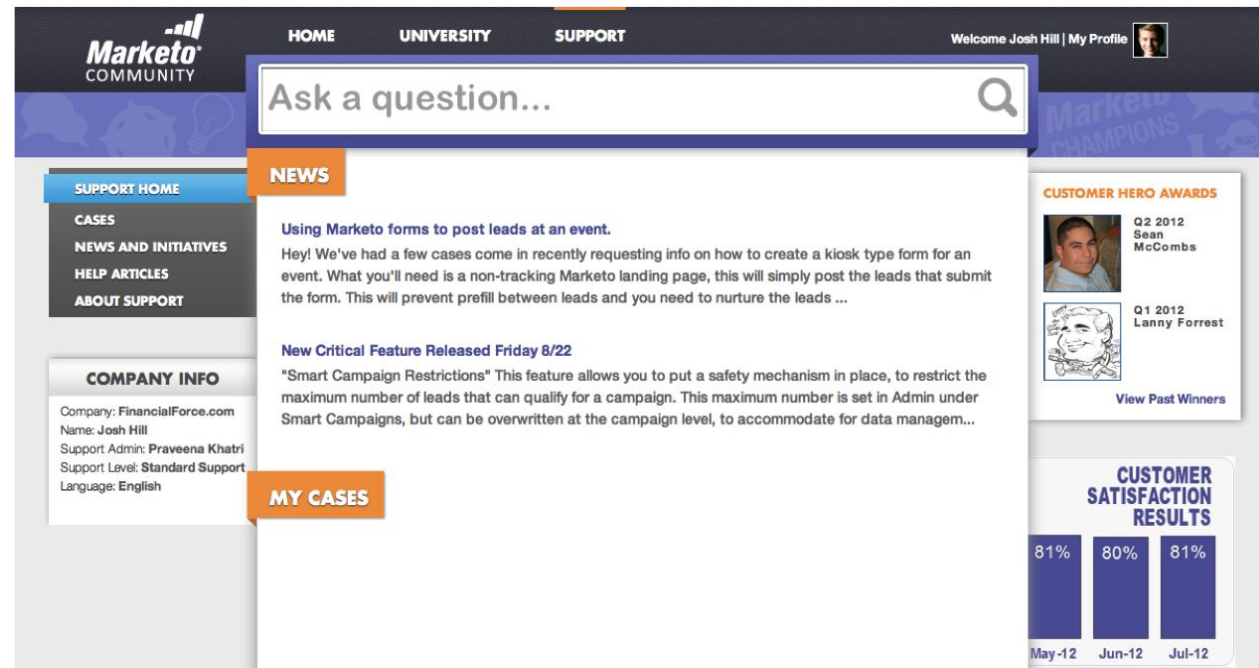
## University

This area includes much of Marketo's QuickStart tutorials, webinars, and long form documentation for newer features. I highly recommend using the Basics first, then heading to Advanced Techniques as your use of Marketo increases.



## Support

Did you not find what you were looking for? Did something strange happen you cannot fix? Ask Support!



## Home

A summary of Support information.

## Cases

Manage and create your cases here. Remember, you can manage cases via email and the Community and have all the details appear here.

Support shows you recent News and Open Cases under My Cases. To create a Case

**Step 1:** Click on Cases to see your list of Cases and Statuses.

You can then Create a Case.

Fill in details. Provide names of the assets, Programs, or Campaigns as well as the direct links to the items in question. This will help your Support representative find a solution faster.

**SUPPORT HOME**  
**CASES**  
**NEWS AND INITIATIVES**  
**HELP ARTICLES**  
**ABOUT SUPPORT**

**COMPANY INFO**  
Company: FinancialForce.com  
Name: Josh Hill  
Support Admin: Praveena Khatri  
Support Level: Standard Support  
Language: English

**CREATE CASE**

**Additional Information** | = Required Information

Priority:   
Case Status:  
Case Number:  
Old Ticket #:  
Date/Time Opened:  
Problem Type:  
Category:  
Sub-Category:  
Cust. Ref. #:  
Last Modified Date:

**CC Email List**  
You may add a comma separated list of email addresses to be included on updates for this case.

Email List:

**Description Information**

Subject:   
Description:

**Save** **Cancel**

**CUSTOMER HERO AWARDS**  
Q2 2012  
Sean McCombs  
Q1 2012  
Lanny Forrest  
[View Past Winners](#)

**CUSTOMER SATISFACTION RESULTS**  
81% 80% 81%  
May-12 Jun-12 Jul-12

### Create a Case Using Email

Step 1: Make sure you are listed as a Support contact and Role.  
You will see this on the Left side of the screen under "Company Info".

Step 2: Email your question to  
`support@marketo.com`

### News and Initiatives

A place where Marketo posts common issues and bugs.

## Help Articles

A link to the main list of articles.

[About Support](#): contact details and hours.

## Contacting Support



**Note:** register your preferred phone numbers so Marketo can call you back.

You can contact support via the Case system (preferred) or email [support@marketo.com](mailto:support@marketo.com) as long as your email is from a client domain and is approved for Support in Roles. A ticket will be created automatically.

### Americas

Hours: M-F, 6am to 6pm Pacific  
Online: [support.marketo.com](http://support.marketo.com)  
Email: [support@marketo.com](mailto:support@marketo.com)  
Toll Free US: +1.877.270.6586  
Direct: +1.650.376.2302

### Europe, Middle East, & Africa

Hours: M-F, 8am to 5pm GMT  
Online: [support.marketo.com](http://support.marketo.com)  
Email: [support@marketo.com](mailto:support@marketo.com)  
Phone: +353 (0)1 242 3030

### Asia Pacific

Hours: M-F, 9am to 6pm Australia Eastern Time  
Online: [support.marketo.com](http://support.marketo.com)  
Email: [support@marketo.com](mailto:support@marketo.com)  
Direct: +1.650.376.2302

## Marketo Trust

[trust.marketo.com](http://trust.marketo.com): Quickly view System Status and email deliverability before sending that support email.

## Self-Help

Other than using this Guide, there are a few things you can do to stay productive using Marketo.



I also recommend a review of Marketo's own thoughts on support:

- [Checklist for Getting the Most from Support.](#)
- [Support Webinar](#)
- [Webinar Slides and Checklist](#)

### What to Check Before Creating a Ticket or Calling Support

Done?	What is Wrong?	Questions to Ask	Comments	Action To Try
<input type="checkbox"/>	Designer not working or does not save.	Did the browser crash? Are you using a supported browser?	Safari is not supported, however it works well with Designer. Chrome has a known issue with Designer	Close Window, re-open. Switch browsers.
<input type="checkbox"/>	Smart list not saving	Did you click somewhere else too quickly? Check connection.	Be sure to click in the white space after each filter change, wait for the Auto Save to finish before further actions.	Try clicking on a different list or on Marketing Activities, then return to the List.
<input type="checkbox"/>	Smart List did not provide data intended.	Did you use the filters correctly?	Usually caused by incorrect filter use.	Review. Check for IS/IN vs NOT or Was vs. Not Was.
<input type="checkbox"/>	Smart List Count is taking too long.	How many filters did you use?	Complex filter use will take longer.	Try clicking on another list, then clicking back on the smart list. Sometimes the overview page will show a count.
<input type="checkbox"/>	Lead did not sync to SFDC	Is your campaign syncing to SFDC? Does the lead have the required information?	Check affected Leads' history for further detail.	Check affected leads for required SFDC creation details. Check Marketo User for access levels. Check SFDC Sync OK on Admin
<input type="checkbox"/>	Sync Failed! Why? OMG!	Call your Marketo Administrator to review Sync. Did an automated email	This is a serious error and the system will usually tell you.	Check Sync Status. Reset Sync Credentials Call SFDC Admin to see if something



		provide information?		changed.
<input type="checkbox"/>	Landing Page or email looks broken.	Call your designer. Is it something specific?	Usually an html coding error. Be sure your <code>mktEditable</code> tags are there and that your designer used the LP Template Code correctly.	Can you edit the HTML to fix it?

You should also consider the following questions

- Is this an integration error?
- Is this an error on my side of the equation and can Marketo help me better understand it?
- Urgency?

### Contacting Support with the Right Details

Before contacting Support, gather together as much of the following as you can:

- ☐ Name of Asset or Campaign
- ☐ Link to an Example Lead or Lead ID/Email
- ☐ What is happening
- ☐ What do you want to happen
- ☐ Counts if data related
- ☐ Business impact and time constraints
- ☐ Contact info – Marketo often has the Administrator's number, not yours.

## Further Networking and Badges

### Becoming a Champion

You may see a few profiles which say “Champion” under their picture or elsewhere. These are users who have shown exemplary leadership in the Marketo Community and across the web through helping other users and being brand evangelists. Each summer and winter a new group of up to 50 special users are granted this distinction. Think you meet the criteria? [Join the club!](#)

My Giant Mug. It fits in my carry on!



## User Group Meetings

User Groups are a great way to get involved with fellow marketers and learn from each other. The calendar icon leads to a sign up page with details on [upcoming meetings](#).

You can also search LinkedIn for your local MUG and learn more about the Group there. I've made many contacts through this method so I highly recommend joining a MUG.

## Refer a Friend = iPad!

You may notice the not so subtle Win an iPad button. If you know of someone who could use Marketo, refer them (with permission) and you can [win the latest iPad from Marketo](#). Pretty cool.

## My Profile – Your Networking Tool

Yet another professional networking tool! Why be anonymous in a closed community of fellow Marketo users? Setup your profile with a picture and contact details. It's up to you, but people are more likely to help profiles with pictures and information. You never know, it could lead to great things.

Step 1: To build your profile, click on My Profile.

Step 2: Click Edit

Add in the details you want.

You should keep these details professional such as work email and LinkedIn with a brief summary of who you are in work life.

**EDIT PROFILE**

**Information | Manage Subscriptions**

**Basic Info**

Community Nickname: Josh Hill

Company Name: Contractor

Position: Principal

Location: Boston, MA

Website Link: <http://jldavidhill.com>

CRM: SFDC

Date I Started Using Marketo: October 2010

**About Me**

I am a revenue team leader with sales, demand generation, and inbound marketing experience in B2B organizations. I work at the nexus of technology, sales, and marketing to deliver revenue for companies. Marketo Guide: <http://eepurl.com/kqfSL>


**Social Links**

Facebook:

Twitter: <http://twitter.com/jldavidhill>

LinkedIn: <http://www.linkedin.com/in/jhill2>

**Profile Image**

Current Image:  Delete

New Image:  no file selected

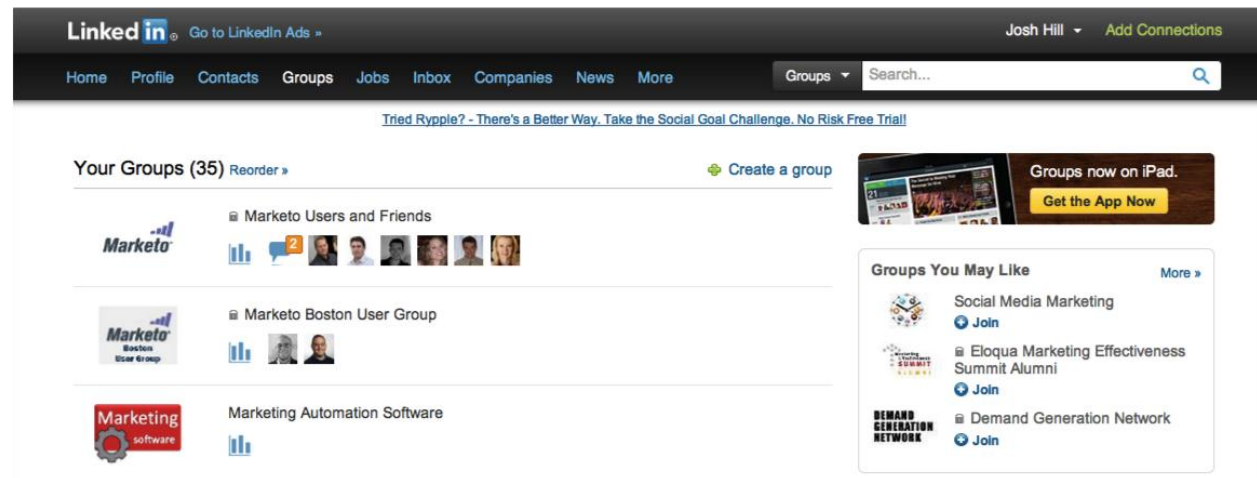
Note: Suggested size for the image is 80 x 80 pixels.

Step 3: Press Save.

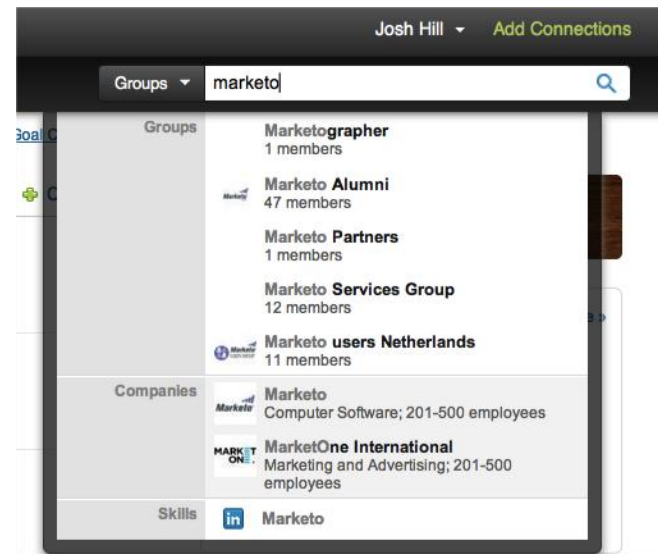
Step 4: You can also Manage Subscriptions for the email address associated with this account.

## LinkedIn Groups

There are several LinkedIn Groups dedicated to Marketo Users. The most popular is [Marketo Users and Friends](#), which is the main official group run by Marketo. Marketo staffer [Liz Coulter](#) is the owner of this group. Introduce yourself!



Definitely join Marketo Users and Friends and then look for your local Marketo User Group (MUG). MUGs are usually by city in North America with groups now popping up in EMEA and soon in Asia. Managers are strict about your location, so be sure to join only the MUG nearest you. There are also special groups by invitation only. Read this Guide and then start helping people...you never know.



Other Groups you might consider joining:

- [Marketing Automation Software](#)
- [Demand Gen Specialists](#)
- [Demand Generation & Marketing Automation Professionals](#)
- [Demand Creation Specialists](#)
- [Marketing Automation Association](#)
- [Marketing Automation Experts](#)
- [Marketing Automation Institute](#) is the group for general certification.
- [Masters of Marketing Operations](#)
- [Salesforce.com Professional Network](#) an informal place for Power Users and Above.
- [Golden Rule Marketing](#). A great place to discuss how automation can treat your clients better.

## Chapter Review

### Self-Quiz

Where is the best place for advice on using Marketo?

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When should you call Support *first*?

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What cool things can you do (or win) on the Marketo Community?

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## Recommended Resources

### Marketo Documentation

Marketo's own [checklist for Getting the Most from Support](#).

[Support Webinar](#)

[Webinar Slides and Checklist](#)

### Tools

[Marketo Community](#)

[Marketo Support Center](#)

[LinkedIn Groups](#)

## Experts

[Jep Castelein](#), Marketo

[Alex Pelletier](#)

[Eric Hollebhone](#)

[Lead Lizard – Sam Boush](#)

[Marketing Rockstar Guides](#)

[The Pedowitz Group](#)

[Demand Gen](#)