

# Marketing Rockstar's Guide to Marketo

# Chapter 1. Introduction

## At a Glance

Overview	3
A Bit About Josh	4
Who is this guide for?	5
Acknowledgements	6
Before you begin	9
How to Make the Most of the Guide	13

## The Marketing Rockstar's Guide to Marketo by Josh Hill

Principal, Marketing Rockstar Guides, LLC

## Overview

This is the guide I wish I had when I started using Marketo in 2010. It is much more than that vision now. It's the Marketo Guide you wish you had yesterday and I hope it's the guide you need right now. Marketo is a fantastic tool for marketers like you and me, yet it is not always clear how to attain our marketing goals using it. In writing this guide, along with my collaborators, my goal was to provide a clear way for you to do the most common marketing tasks using Marketo. In other words, I translated your real life problem into a solution using Marketo's campaigns, programs, lists, and workflows.

Of course, each company is different and you may find it necessary to modify the steps you find here to match your unique situation. Please do so! This is a guide, a template, but not the instruction manual for your firm's marketing plan. As you become proficient in using Marketo, you will develop unbelievable skills and systems to automatically run much of your marketing. (If you develop a solution to a marketing problem not seen in these pages, let me know! I'll feature you in the next edition).

## A quick note about payment

I decided to offer this guide in a serial format, over time, to best take advantage of the time and fluid nature of Marketo, just like any software tool.

You are welcome to download the Marketing Rockstar's Guide to Marketo at no charge. What I do ask is if you start to download several chapters and find them useful, please consider a payment to keep the project going.

[Sign Up for Updates!](#)

As an added bonus, I may invite Members to special projects or early releases of chapters as they come out. Members also will receive a full PDF when all the chapters are complete. That means a few extra days of Marketo excellence before your competitors. That's a pretty small price to pay to be an insider, right?

## A Bit About Josh

**Josh Hill** is an experienced marketer at the nexus of sales, technology, and marketing. He began using Salesforce in 2007 and quickly became a power user, laying the foundations for his first Marketo integration in 2010. That Marketo experience sparked the early versions of this guide you have today.

Josh uses the [Golden Rule](#) to create delightful customer experiences, develop new products, and to run businesses. The Golden Rule is the ultimate expression of being customer centric.

Josh works with technology and media firms to develop demand generation programs across all channels. He works primarily with Marketo+Salesforce integrations and advises on best practices marketers can use for revenue performance management. Josh has worked with media and technology firms in Singapore, New York, Boston, and San Francisco.

Contact Josh at [josh@marketingrockstarguides.com](mailto:josh@marketingrockstarguides.com) or visit one of his blogs:

[Marketing Rockstar Guides](#)

Demand Generation and Marketing Automation

[JDavidHill.com](#)

Personal Site

[Golden Rule Now](#)

Dedicated to using the Golden Rule for better business practices.

**Connect with Josh**



## Who is this guide for?

In many ways, this guide is a re-organization of the Marketo documentation, community discussions, and my experience using the system. The guide can be used as a reference for the skilled user or a How To for the newbie.

The Guide is primarily intended for those with about 6 months of Marketo experience. It is primarily for business-to-business marketers using the Standard, Select, or Enterprise Editions with Salesforce.com. This guide does not cover Spark. Spark users may find this guide to be helpful, however. Of course, plenty of other users can make the most of this Guide, possibly learning neat tips and tricks or as a reference for power users:

Marketo Experience	What You Can Gain	Best Way to Use this Guide
Pre-Start – Building Your First One	Whether you've run automation systems before or not, there are some key steps and technical issues to be aware of before you begin. You may find time to rethink your sales funnel tracking too.	Read the sections on Lead Management, Data Management, SFDC Integration, and Lead Scoring.
Quick Start Newbies (0 – 6 Months)	I'll show you how to setup webinars, events, and even a few tricks they didn't share with you during setup.	Got to send that email now? Check the Sending an Email section or Setup a Webinar now.
Solid Users (6-18 months)	You want to go beyond Send Email and start Nurturing and Analytics. Great! Let's do that together.	Learn a bit more about AB Testing, Advanced Nurturing, and Analytics.
Power Users (18+ months)	Use the Guide as a reference of filters, triggers, etc as well as a starting point for RCM and RCA if you are going in that direction.	See the Appendix in the back! Or thumb through for trickier situations. If you can't find an answer, email me so we can add it later.

## Acknowledgements

As promised, this is the acknowledgements page for people who helped me with this guide with their advice and more importantly, submissions of How Tos, Case Studies, and Reference Guides.

Person	Contribution	Contact
<a href="#">Sam Boush</a>	Forms Case Study	sam@leadlizard.com leadlizard.com
<a href="#">Ryan Vong</a> <a href="#">Zak Pines</a>	Ideas for Guide Ideas for Guide Demand gen mentor	ryan.vong@gmail.com Marketing Director <a href="#">Ipswitch File Transfer</a>
<a href="#">Jep Castelein</a>	Providing much needed Marketo assistance and reviewing the Guide	<a href="#">Principal Consultant</a> <a href="#">Marketo</a>
<a href="#">Jason Long</a>	Token help and great guy	Revenue Engineer The Pedowitz Group
<a href="#">Lev Barenboym</a>	Template design and layout. Copyediting and more.	lbarenboym@gmail.com
<a href="#">Robbie Mitchell</a> <a href="#">Eric Hollebone</a>	Modular Nurturing Guide <a href="#">Advanced Nurturing Inspiration</a> and Marketo Ultimate Champion	marketo@robbiemitchell.com <a href="#">Test.hollebone.ca</a> is a tremendous resource for technically inclined.
<a href="#">Phil Dolan</a>	Video in Marketo Slides and Case Study	<a href="#">Navicure</a>
<a href="#">Alexandre Pelletier</a>	Getting Started with RCA	www.apelletier.com 514-913-3039 alex@apelletier.com
<a href="#">Stephanie Worthington</a> <a href="#">Brian Wood</a>	SFDC Integration <a href="#">Advanced Nurturing Deep Dive Slides</a>	<a href="#">Coraid</a> Director of Marketing Radisys
Ryan Nichols	<a href="#">Marketo Integration and API Slides</a>	Vice President, Apps Podio
Heather Watkins	Keeping me connecting to the Marketo world and employed!	<a href="#">Director of Community</a> <a href="#">Marketo</a>
Liz Courter	Being a tremendous community manager	<a href="#">Community Manager</a> <a href="#">Marketo</a>
Bud Smith	Introducing me to the world of writing guides.	<a href="#">Technical Documenter</a> <a href="#">Marketo</a>

I have noted people throughout this guide through links or call outs. If I missed you, I apologize in advance.

I also want to thank the many fine folks at Marketo, Marketo Support, and the Marketo Community for their support, guidance, and submissions to this Guide.

Best,

A handwritten signature in black ink that reads "Josh". The letters are cursive and fluid, with a prominent loop on the 'J' and a trailing flourish on the 'h'.

Josh Hill  
Demand generator

## Legal Stuff

The Marketing Rockstar's Guide to Marketo  
by Joshua D. Hill  
© 2011-12 Marketing Rockstar Guides, LLC. All Rights Reserved.  
First Edition, November 2012.

Marketo and Marketo Spark are registered trademarks of Marketo, Inc. Salesforce.com is a registered trademark of Salesforce.com, Inc. Microsoft Dynamics, Office, Word, and Excel are registered trademarks of Microsoft, Inc. Other names may be trademarks of their respective companies.

Marketo, Inc and/or its employees did not write this guide. It is an independent project.

No personally identifiable or proprietary information is displayed in this Guide. Any email addresses or domains shown are for illustrative purposes and are unlikely to be real sites, emails, or domains. Please exercise common sense when applying examples to your own business.

The Marketing Rockstar's Guide is meant to provide illustrations of how to use Marketo for business purposes. The examples are culled from best practices as well as Marketo's own workflows. There is no intention to provide advice leading to any specific result, business or otherwise. Please use the examples as a guideline; they may not always be appropriate for your business or systems, so be careful.

Links to external resources are provided as additional resources, I do not necessarily endorse any firm. Their content and claims are their responsibility. Most links are free of affiliate tracking, however certain Tool recommendations may have affiliate links.

Josh Hill and Marketing Rockstar Guides, LLC does not claim any responsibility for your use or misuse of the information provided. Please consult an appropriate expert if you are ever uncertain about using Marketo. References to laws and legal situations are not intended as legal advice. Please seek legal counsel in your jurisdiction in regard to any legal situations related to your use of Marketo.

Use of Case Studies or other examples from real companies or consultants are provided with permission, which is noted whenever those appear in the Guide. If you find their ideas helpful, thank them!

If you discover an error or question regarding the accuracy of claims, examples, or steps, please email me: [corrections@marketingrockstarguides.com](mailto:corrections@marketingrockstarguides.com).



## Before you begin

The Marketing Rockstar's Guide to Marketo assumes you have some basic knowledge of the system including understanding the terms Campaign, Smart List, Static List, Program, and Flow. We will definitely go through these in some detail, however, the Guide is meant to help you get results from Marketo.

That being said, we will cover a number of setup topics with step-by-step explanations to help you more deeply understand what you can do with the system.

## Formatting of the Guide

The Guide is formatted to help you use Marketo in common modern marketing situations. I assume you are somewhat familiar with Marketo's terms and general layout. There is a helpful Glossary and Icon Guide at the end of the Guide. Here are the key things you need to know about the layout.

Text will change depending on what I am discussing. Aside from the headers, watch for these styles:

Regular Text

`Filter, Trigger, Example Name, Commands or programming code`

Boolean or filter commands: `STARTS WITH OR AND IS or IS NOT`

Eg: use the filter `Member of Smart List IN Test Leads`

Step 1: Used in How Tos to denote main steps

## Icons

There are four icons used to bring attention to a key point. Heed them.



Caution! Be careful. What you are about to do may affect other things more than intended.



Note. A helpful reminder about what is going on.



Best Practice: a friendly reminder on the ideal way to handle a situation.



Warning! Expect a database meltdown of epic proportions. Ok, maybe not. But this is a serious alert.

## Glossary of Common Terms

Marketers like to use our own language, even special jargon in subsets like demand generation and marketing automation. Marketo has its own terminology as well, which sometimes I translate into my own way of thinking. I tend to switch between these and have done my best to be consistent. Please be advised:

Term	Definition
Action	Sometimes used to refer to a Flow. Also can refer to the Flow Actions you manually run using the Lead Database List View.
Campaign	Campaign or Smart Campaign. May refer to the entire Campaign Program such as a white paper promotion.
Channel	Often refers to the Channel Tag and Progressions. May refer to a marketing channel such as Email or Webinars.
Conversion	Usually refers to a Form Fill Out on a Landing Page. Can also refer to success points in the sales funnel.
Flow or Workflow	This is the Flow component to a Smart Campaign and may refer to the entire Campaign. It is what we do to leads that qualify.
Import or Upload	Are equivalent.
Lead	Almost always refers to a record in Marketo or Salesforce (SFDC Lead OR SFDC Contact). A lowercase "lead" is usually used when I mean any sort of lead.
Live Event	Always refers to a trade show, roadshow, or "in-person" and offline event.
Member	Member of a Marketo Program. SFDC Campaign Member is often explicitly used.
Nurturing Program	Nurturing programs or systems of any type. Almost always refers to a Marketo Program and its child components.
Status	Usually context specific, such as Lead Status (position in funnel) or Member Status (position in Program).
Webinar	A webinar or webcast, recorded or live. Vendor neutral.

## Online Content



During the course of this guide you will find hyperlinks to online content. The existing Marketo Documentation and Marketo Community offer excellence resources, many of which I draw upon. Each chapter has a Recommended Resources summary of useful documentation or expert articles. I also include links to my own content seen on my blog at MarketingRockstarGuides.com. Extra content is [also available here](#).

## Chapter Layout

Each chapter is based on a specific function of Marketo or a marketing action, such as Running a Webinar. A typical chapter covers

### Feature or Purpose

An introduction to the feature with screenshots or overview. For a marketing action, such as a Nurturing Program, I will discuss some key reasons or issues. In most cases, I am assuming you are familiar with the core concepts.

### Basic Concepts

While I assume you know what an Email or Landing Page is, I do not always assume you understand how Marketo handles certain things. Here we will go through the basics. For feature use, this is straightforward. For a major marketing concept, such as Email Reputation, I will discuss the individual issues in detail.

### How To...

The part you bought this Guide for. How to get a Webinar done, or a nurturing program, or whatever. Marketo can do many things but its *value is in how you organize its features* to fit your needs.

### Recommended Resources

I peppered this Guide with direct conceptual links right back to sources or experts. I also summarize them here for your benefit. Some chapters will include a FAQ.

## How to Make the Most of the Guide

You can use this guide from start to finish to learn a ton about Marketo.

A better way is to use this as your trusted colleague. Refer to the Guide with a question about how to do something. Use it as a visual instead of the monitor. Use it to get ideas. Use it well and use it wisely.

**Ok, let's get moving because you need leads. Leads now.**