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Exam : **AD0-E556**

Title : Adobe Marketo Engage
Architect

Vendor : Adobe

Version : DEMO

NO.1 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. * 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

B. * 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

C. * 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

Answer: B

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.2 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 "skips"-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 "skips." 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 "no score" and negative levels.

Unicorn reaches its Salesforce API limit daily, which causes a backlog of issues in each system. The workflow of the employees who have to use them is also heavily affected by this issue. It takes hours to days for the correct data to come into Adobe Marketo Engage and Salesforce but it's important for new leads to be synced after creation as soon as possible. The IT team has reviewed which applications are using the API and suspect Marketo Engage is the culprit.

Before raising their API limit, which two tasks should an Architect perform to resolve

A. Change any additional Smart Campaigns with the 'Sync to SFDC workflow steps to Request Campaign that runs daily to reduce load

B. Change any additional Smart Campaigns with the 'Sync to SFDC workflow steps into batch campaigns that run daily to reduce load

C. Change any third-party form integrations into Marketo Engage or Salesforce forms to cut down on additional API usage

D. Remove any additional 'Sync to SFDC Workflow steps in Smart Campaigns other than the dedicated ones managing the sync

E. Change from using 'Add to Salesforce Campaign' smart campaign workflow step, and instead use the native 'Marketo Program/Campaign' sync setup

Answer: A,B

Explanation

Changing any additional Smart Campaigns with the 'Sync to SFDC workflow steps to Request Campaign that runs daily to reduce load and changing any additional Smart Campaigns with the 'Sync to SFDC workflow steps into batch campaigns that run daily to reduce load are two tasks that an Architect should perform to resolve the issue of reaching the Salesforce API limit daily. These tasks would help reduce the number of API calls made by Marketo Engage to Salesforce and avoid exceeding the rate limit or concurrency limit. Changing any third-party form integrations into Marketo Engage or Salesforce forms to cut down on additional API usage would not help with the issue of syncing new leads as soon as possible. Changing from using 'Add to Salesforce Campaign' smart campaign workflow step, and instead use the native 'Marketo Program/Campaign' sync setup would not reduce the number of API calls made by Marketo Engage to Salesforce. Removing any additional 'Sync to SFDC Workflow steps in Smart Campaigns other than the dedicated ones managing the sync would not ensure that new leads are synced after creation as soon as possible.

<https://developers.marketo.com/rest-api/>

<https://developers.marketo.com/rest-api/marketo-integration-best-practices/>

NO.3 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.)

A. Reduce the access for the demand generation manager and IT manager to a limited role that cannot create fields

B. Create two workspaces: An operational workspace and a marketing workspace

C. Create two workspaces: A prospect workspace and a customer workspace

D. Create a folder structure to organize customer vs prospect campaigns

E. Create a naming convention that tags customer vs prospect campaigns

F. Increase the access for the marketing operations manager and CRM administrator to super admin so they can override the field creations from others

Answer: A,C,E

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>

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Multiple Unicorn teams are manually placing Sources in multiple areas. A small set of IT members decides to use an API that triggers when the Source field is not one of a list of 9 values, or is empty. When this is the case, the API is called via webhook to confirm if there is information in the Comments, Status, or custom field

'Sales update1 and then replaces the Source with what is found in those fields, in the above order of importance.

These IT team members are ready to switch on the solution after testing successfully in a staging area, but request feedback from the Marketing team and the Adobe Marketo Engage solution architect.

The larger IT team and Marketing stakeholders are alerted to a wider review to determine if it matches the current needs across each team.

Which steps should be taken first?

A. Make sure the larger IT team switches on the solution in a low-activity timeframe, where as little automated and marketing work is happening. Once the updates are complete, monitor the change of data as it is switched on, to check for any unexpected effects in the Marketo Engage instance.

B. Recommend they build a new field to update this data into the CRM that can not be seen by Marketo Engage. This way, Marketing and IT can see the data in CRM without affecting any operations outside CRM.

C. Perform an audit of Marketo engage automation and analyze the impact, outline any issues with the proposed changes, and make recommendations and next steps. Send this report to the rest of the stakeholders and IT team to make sure it aligns with their needs before agreeing to anything.

Answer: C

Explanation

Performing an audit of Marketo Engage automation and analyzing the impact, outlining any issues with the proposed changes, and making recommendations and next steps is the best step to take first. This way, the solution architect can ensure that the solution is aligned with the business requirements and best practices, and that it does not cause any negative consequences for the data quality, campaign performance, or reporting accuracy. Sending this report to the rest of the stakeholders and IT team would also allow for feedback and collaboration before implementing any changes. Making sure the larger IT team switches on the solution in a low-activity timeframe, where as little automated and marketing work is happening would not be a good step to take first, as it would risk disrupting the existing workflows and data integrity without proper testing and validation. Recommending they build a new field to update this data into the CRM that can not be seen by Marketo Engage would not be a good step to take first, as it would create data silos and prevent Marketo Engage from using the source information for segmentation, personalization, or attribution.

NO.5 An Adobe Marketo Engage Architect needs to audit an existing Marketo Engage instance. Upon inspection, more than 1000 fields that only live in Marketo Engage were created for a single use to collect information for a specific event, or ask a specific question during the registration of an event. What should the Architect recommend to their client regarding field creation best practices?

A. Create a set of temporary program member fields (PMCF String 1, PMCF String 2, PMCF Boolean 1, PMCF Boolean 2) and utilize those fields on a local form for every event that requires custom questions.

No additional action is needed to retain the data.

B. Create a set of temporary person fields (temp_string 1, temp.string 2, temp.date 1, temp.date 2) and utilize those fields on a local form for every event that requires custom questions. Add them to a static list if data needs to be retained. Clear the data from the temporary fields at the end of the event for utilization by another program.

C. Create a set of temporary program member fields (PMCF String 1, PMCF String 2, PMCF Boolean 1, PMCF Boolean 2) and utilize those fields on a local form for every event that requires custom questions.

Add them to a static list if data needs to be retained.

Answer: C

Explanation

Creating a set of temporary program member fields and using them on local forms for every event that requires custom questions is a good way to avoid creating too many fields that only live in Marketo Engage.

Adding the leads to a static list can help retain the data if needed.

<https://experienceleague.adobe.com/docs/marketo/using/home.html>