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# Question 1

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## Question Type: MultipleChoice

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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
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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.

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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 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?

### **Options:**

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

**D-** Create a Custom Activity linked to the person record

**Answer:**

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C

**Explanation:**

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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.

## Question 2

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**Question Type:** MultipleChoice

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Refer to the case study.



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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.

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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."

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## CMO

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- \* In general, analytics integrations are manual, slow, and unreliable
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## CIO

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## MARKETING STAFF

Marketing Operations staff concerns:

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

Example.

- 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.

A key revenue source for Unicorn is "skips". This source is made up of customers who initially engage with Unicorn, but then "skip" to receive services directly from a consortium bank. Unicorn wants to attribute this revenue from these customers to their campaigns. Unicorn IT has done the due diligence to be able to receive access to this data.

For Marketo's revenue attribution model and overall data architecture, in which location should this data be available to Marketo?

### Options:

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- A- Stored directly on the Person record
- B- Stored on the Salesforce Opportunity Object and synced to Marketo via the native sync
- C- Stored on a Salesforce Custom Object and synced to Marketo via the native sync
- D- Stored in a Marketo Custom Object

### Answer:

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B

### Explanation:

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Storing the data on the Salesforce Opportunity Object and syncing to Marketo via the native sync is the best location for Marketo's revenue attribution model and overall data architecture. This way, Marketo can use the Opportunity Influence Analyzer and the Revenue Cycle Modeler to attribute revenue to campaigns based on the opportunity data. Storing the data directly on the Person record would not allow for revenue attribution, as Marketo does not use person-level fields for this purpose. Storing the data on a Salesforce Custom

Object or a Marketo Custom Object would require additional configuration and integration to link the data to the person and the opportunity.

## Question 3

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**Question Type:** MultipleChoice

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Unicorn Fintech launches a new paid subscription app where users can sign up to read financial advice. Access to Unicorn Fintech's new app is renewed each year, and the App User Expiry Date is a date field that is updated hourly from CRM to Adobe Marketo Engage. Another string type field called App User Status changes to a status of "Current" in Marketo Engage when the App User's access becomes valid, and changes to "Lapsed" if the App User fails to renew.

The Marketing team wants to add App Users who have not yet renewed to an Engagement Program to nurture them 2 months prior to their App User Expiry Date, and then remove the App User from the nurture if they renew.

Which smart campaign setup is the most efficient to manage adding the App User to the nurture?

### **Options:**

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**A-** Build a scheduled batch Smart Campaign, use a Wait Step with a Date Token, and then Add to Engagement Program

**B-** Build a scheduled batch Smart Campaign, use a Wait Step with a specific date, and then Change Engagement Program Cadence

- C-** Build a triggered Smart Campaign, use a Wait Step with a Date Token, and then Add to Engagement Program
- D-** Build a triggered Smart Campaign, use a Wait Step with a specific date, and then Change Engagement Program Cadence

**Answer:**

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C

**Explanation:**

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Building a triggered Smart Campaign, using a Wait Step with a Date Token, and then Add to Engagement Program is the most efficient way to manage adding the App User to the nurture. This way, the Smart Campaign will trigger whenever the App User Status changes to "Lapsed", and then wait until two months before the App User Expiry Date to add the App User to the Engagement Program. Building a scheduled batch Smart Campaign would require running the Smart Campaign periodically to check for new App Users who have not renewed, which is less efficient. Using a Wait Step with a specific date would not work for different App Users who have different expiry dates. Changing Engagement Program Cadence would not add or remove the App User from the nurture.

## Question 4

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**Question Type:** MultipleChoice

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Refer to the case study.

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Despite the absence of an external Sales team,

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Unicorn Fintech needs to revamp its scoring model.

Who should be involved in making decisions on what behaviors should be scored?

**Options:**

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- A- Marketing Operations Manager, CRM Administrator, CMO, and a sales team representative
- B- CIO, CMO, a sales team representative, and Web Developer
- C- Marketing Operations Manager, CMO, a sales team representative, and Web Developer
- D- CIO, CMO, CRM Administrator, and a sales team representative

**Answer:**

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A

**Explanation:**

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Marketing Operations Manager, CRM Administrator, CMO, and a sales team representative should be involved in making decisions on what behaviors should be scored. The Marketing Operations Manager is responsible for lead scoring and analytics, the CRM Administrator is responsible for the Salesforce CRM system, the CMO is responsible for the overall marketing strategy and budget, and a sales team representative can provide feedback on the quality and readiness of the leads. The CIO and the Web Developer are not directly involved in the scoring model, as they are more focused on the technical aspects of the marketing technology and integrations.

## Question 5

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**Question Type:** MultipleChoice

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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

### **Options:**

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

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

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

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

**E-** Remove any additional 'Sync to SFDC Workflow steps in Smart Campaigns other than the dedicated ones managing the sync

**Answer:**

---

B, D

**Explanation:**

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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/>

## Question 6

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**Question Type: MultipleChoice**

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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 0 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.

Some of Unicorn's customers use their financial products and services. Marketing wants to roll out a "Weekly rollup" email to customers who are opted in for email. This email will show a quick snapshot of how each product/service those customers have with Unicorn perform.

The data to send these emails must be set up to sync to the Adobe Marketo Engage instance for each customer. Each customer can own multiple of the same product, or a number of products/services.

How should this data be pushed into Marketo Engage to be used most effectively?

### **Options:**

---

**A-** Sync this data on the 'Person' Level in a number of fields for 'Product' or 'Service'

Build Segmentations for Product and Service

Add Segments into the Email as Dynamic content for personalization

**B-** Create a maximum of 3 fields for each piece of data for both Products and Services onto the 'Person' Level

Add each field into Email Scripting tokens then use to turn the module on or off if they have less than 3 products

**C-** Build two Custom Objects, one called 'Products' and one called 'Services' to link onto Person

with relevant fields

Use an Email Scripting token in the email so it can be personalized for each email recipient



**Answer:**

---

C

**Explanation:**

---

Building two Custom Objects, one called "Products" and one called "Services" to link onto Person with relevant fields is the best way to push the data into Marketo Engage. This way, you can store multiple records of products and services for each person, and use an Email Scripting token in the email to personalize it for each recipient. Syncing this data on the "Person" level in a number of fields for "Product" or "Service" would limit the number of products and services you can store for each person, and would require building Segmentations for Product and Service and adding Segments into the Email as Dynamic content for personalization. Creating a maximum of 3 fields for each piece of data for both Products and Services onto the "Person" level would also limit the number of products and services you can store for each person, and would require adding each field into Email Scripting tokens then use to turn the module on or off if they have less than 3 products.

<https://nation.marketo.com/t5/product-blogs/custom-objects-best-practices-tips-and-tricks/ba-p/244199>

## Question 7

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**Question Type:** MultipleChoice

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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.

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## 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

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## 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
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All campaigns to date direct respondents to a single 0 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

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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

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- \* 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
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## 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 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?

### **Options:**

---

**A-** 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

**B-** 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

**C-** 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

**D-** 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

### **Answer:**

---

C

### **Explanation:**

---

Building smart campaigns that trigger based on the appropriate form into the scoring program and adding the appropriate score value '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/>

## Question 8

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**Question Type: MultipleChoice**

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A company implements Workspaces and Partitions for global regional marketing operations. They need to separate their Workspaces into North America, APAC, and EMEA regions as each region should not see the other region's marketing activities. They also have a Default Workspace. The Default Workspace has access to all Person Partitions. Each regional Workspace has access to their own regional Person Partition. The default dedupe key for the Unicorn Adobe Marketo Engage instance is email address.

A form that exists in the the North America workspace is filled out by a new person.

Which default behavior should be expected?

**Options:**

---



- A-** The new person will be created in the default Partition and immediately routed to the North O America Partition
- B-** The new person will be created in the North America Partition where the form exists
- C-** The new person will be created in the default Partition and should remain there as long as the North America workspace has access to the default Partition

**Answer:**

---

B

**Explanation:**

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The new person will be created in the North America Partition where the form exists because that is where the lead source is located. The Default Workspace has access to all Person Partitions but it does not determine where new leads are created.

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

## Question 9

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**Question Type:** MultipleChoice

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An Adobe Marketo Engage Architect starts their first day at their new job managing the Marketo Engage instance. When inspecting the instance, they notice that the sync to Salesforce was unusually slow and takes several hours to populate Salesforce campaign membership from Marketo Engage programs. Upon closer inspection, several errors occurred under the notifications of syncs timing out or hitting the concurrent limit.

Which three actions can the Architect take to help diagnose and address the problem around sync to Salesforce issues?

### Options:

---

- A-** Use campaign inspector to determine the number of sync to CRM flow steps  
Check the permissions in the CRM for the Marketo sync user profile  
Check for a sync backlog in the CRM admin under the sync status tab
- B-** Create a smart list to identify Marketo Engage records that have an empty CRM type  
Review the field management mapping  
Check the permission in the CRM for the Marketo sync user profile
- C-** Go to admin and view the CRM notification errors  
Count the number of custom CRM fields  
Increase the time between CRM and Marketo syncs

### Answer:

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A

### Explanation:

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Using campaign inspector and creating a smart list are two actions that can help diagnose the sync issues by identifying the number of sync to CRM flow steps and the records that have an empty CRM type. Checking the permissions in the CRM for the Marketo sync user profile can also help address the problem by ensuring that the sync user has the right access level. Counting the number of custom CRM fields or increasing the time between CRM and Marketo syncs are not helpful actions.

## Question 10

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**Question Type:** MultipleChoice

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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?

### Options:

---

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

**C-** 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.

### **Answer:**

---

A

### **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>

## **Question 11**

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### **Question Type: MultipleChoice**

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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.)

### Options:

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

### Answer:

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B, C

### Explanation:

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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-one.html?lang=en>

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