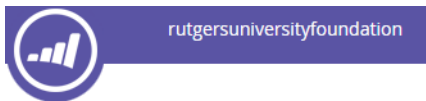


Marketo Terminology Refresher and Cheat Sheet

Marketo Terminology Review

- **Workspace** – your Marketo universe. Contains all email campaigns, templates, and lists. 2 administrators can access each workspace.
- **Program Template** – a template to copy from to create new email campaigns. Contains a blank email for editing and your list (see folder names)
- **Email Program** – the 4 components you need to send your email: **audience, email, schedule, and approval**
- **Email Campaign** – one email sent to a selected audience. An email campaign uses a program template to build out individual emails to send. (see folder names)
- **Email** – the actual email you will mail to an audience
- **Smart List** – the master list of your full alumni constituency that is available in the program templates in your workspace. *Note: during training, there is a sample list only.*
- **Clone** – copying over a program or old email to make a new one
- **Powerball** – the purple circle top left – when you click it turns into a site menu



Marketing Activities...

Marketo Cheat Sheet

- Log into Marketo at: <https://rufsso.rutgers.edu/>
- Remember, your Marketo login and password are your **NetID** login and password
- All email campaigns are created and sent in '**Marketing Activites**'
- All images are uploaded in '**Design Studio**'
- Your program templates should be kept clean – use them to clone from.
Never edit a list or mail an email from your template folder!
- To get a new email started, copy or “clone” from one of your templates, or a previous email you have sent
- Always keep your workspace name in your email program name for reporting purposes! (see workspace setup for visual)
- Visit ralumni.com/marketo for step by step guides to help answer common questions
- Reach out to your Volunteer Engagement staff contact with questions or concerns

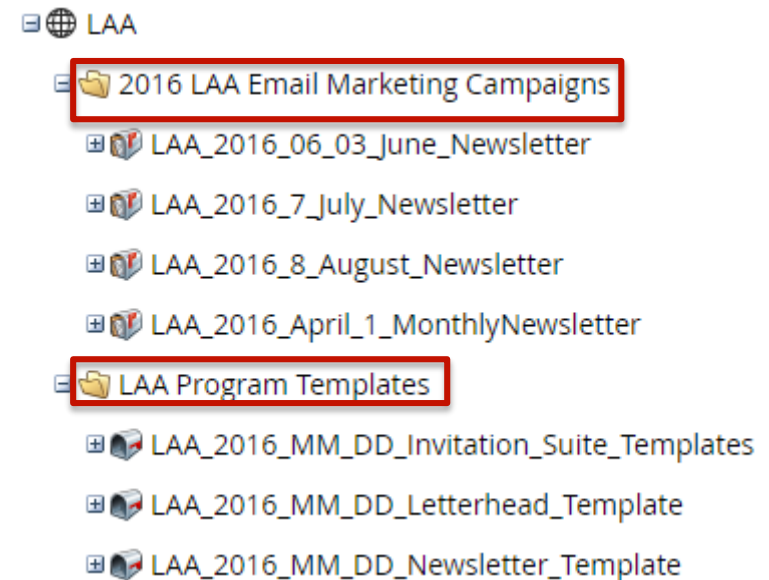


What's in my workspace?

- 4 email **program templates** each featuring a different email template/layout
- A **smart list** connected to each email program template that includes your base audience – i.e. all alumni from your organization
- **Note:** *during training, you will have access to a 'training smart list' with only 2 recipients. Your full list will be pushed live after you complete training exercises.*

Workspace Set Up

- Every email program in a workspace has a naming convention – **Workspace_YYYY_MM_DD_Freeform Entry of email type.**
 - Keep this naming convention, including underscores, for ease in reading reporting down the road.
- As you create a new program, **ALWAYS start the name with the acronym you see in your program templates.** This will keep reporting clean and ensure opt out programs function correctly.
- Remember – your program templates contain your list of your total constituency, and basic template layouts. **The purpose of the templates is to clone and use over and over.** Do not send emails or filter your list before you clone a template into another folder for modification
- The graphic to the right is a sample of a workspace that has cloned from its program templates into a new folder, and used the correct naming convention for email programs.



What's in my workspace? - Templates

There are 4 email layout templates in each workspace

1. **Invitation Suite** – includes Save the Date, You're Invited, You're Registered, and Thank You layouts.
2. **Letterhead** – basic template with your organization's logo at the top. Recommended use for Dean communications, or some newsletters.
3. **Newsletter** – designed newsletter layout with a featured story area and 3 supporting stories. Template is very clean but not easy to adjust if you have more or less news for it.
4. **One Off** – Essentially the letterhead template without the line below the logo. This template would be recommended for an organization mailing a message featuring one large graphic, for example

Marketo Reminders

- **Never** edit the smart list or email asset in a template. **Always clone first.**
- Name your programs using the **Workspace_YYYY_MM_DD_Freeform_Entry** format
- Always start the program name with the acronym used in your program templates
- Reach out to your Volunteer Engagement staff partner with questions or issues.
- Visit ralumni.com/marketo for a downloadable copy of this training, as well as other step by step and troubleshooting guides.