STATE STREET GLOBAL ADVISORS

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Icons

Icon	Description	Product Documentation link
	Smart Campaigns Smart campaigns are the most important tool in Marketo. They can trigger on one person and perform actions or rollup millions of people and run a series of flow steps.	Click Here
	Static List A Static List is a list of names from your Database. This is a group of people already in your Database.	Click Here
	Smart Lists Smart Lists allow you to find specific groups of people using simple filters.	Click Here
	Reports Reports help analyze people, your programs, landing pages, emails, and social assets.	Click Here
	Email Programs Send out emails, create A/B tests, and track your results all in one place.	Click Here
	Email Engages your customers as individuals in your email marketing. Delivers compelling messages relevant to your audience and measure the ROI of your email campaigns.	Click Here
	Landing Pages Landing Pages are Marketo-hosted pages that allow you to display content and track visitors.	Click Link

	Forms Create and use a form on a landing page to generate new names. Forms can reside on Marketo landing pages and also be embedded on any page of your website.	Click Link
	Test Group Marketo tracks the number of page views and form completions on each tested page within a Test Group. You can use Test Group results to decide which Landing Page and Email is the most compelling.	Click Link (Landing Page) Click Link (Email)
	Workspace Workspaces are separate areas in Marketo that hold marketing assets like programs, landing pages, emails and more. They can be used by multiple people. Each user has access to one or more workspaces (e.g. CoE, North America, Testing).	Click Link
	Folder Folders inside a program can be used to organize your smart campaigns and assets.	Click Link
	Archive In Marketo you have the ability to convert existing folders into Archive folders. Archive folders exist in Marketing Activities, Database, and Design Studio.	Click Link

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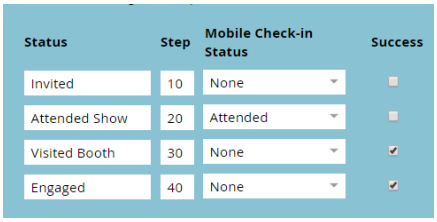
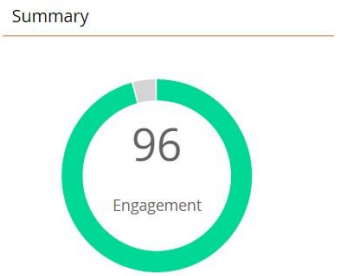
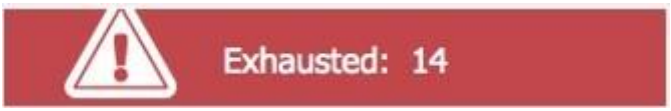
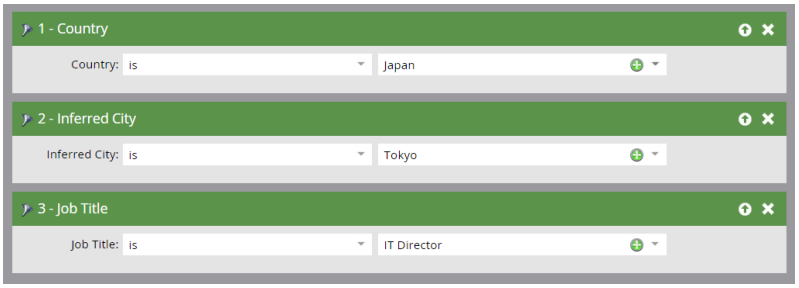
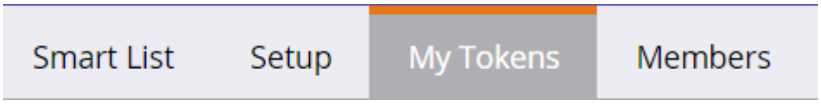
Marketo Terms

Name	Description
Assets	**Definition:** Assets are the content that make up your Program. These include emails, landing pages, follow up pages, lists, reports, social buttons, and forms. **Application:** Assets are customizable and enable you to build automated marketing initiatives. **Where you might see this:** Assets can be created for use within a Program.
Cast	**Definition:** A cast is the event of sending emails from a Stream in an Engagement Program. **Application:** You decide when a cast happens by setting up stream cadence. This is how you schedule content to go out at regular intervals. **Where you might see this:** You see this in an Engagement Program.
Channel	**Definition:** A channel is the mechanism you choose to deliver a specific marketing initiative. Examples include Webinar, Sponsorship or Online Ad. Custom channels can be defined for your marketing activity in Marketo. **Application:** It is recommended that you create custom channels using your chosen naming conventions. These can be defined by your Marketo administrator. **Where you might see this**: Below is an example of a standard Tradeshow - Channel configuration:  Note: Leads can only be one status at a time.
Dynamic	**Definition:** Sections of content in Marketo emails and landing pages can be customized according to the recipient (e.g. changing the language in an email, based on the recipient's country). **Application:** To use dynamic content, you would first create a custom field, and then create your segmentation using this field. You can then use this segmentation as the basis for dynamic content. **Where you might see this:** When creating snippets, emails, and landing pages. Marketo Segmentations is a prerequisite to ensure dynamic content works.
Engagement	**Definition:** Engagement is calculated based on leads demonstrating an interest, by interacting with the content in your engagement program. For example by clicking links or downloading PDFs.

	 **Application:** It measures the following metrics into a score: Opens, Clicks, and Unsubscribes. **Where you might see this:** The Marketo Engagement score is a key metric in the Engagement program dashboard.
Exhausted	**Definition:** Marketo will set a lead to Exhausted once the Stream runs out of content. To resolve this, add more content to the Stream.  **Application:** A constraint can be added called 'Exhausted Content' for the members of Engagement Program. Where you might see this: In an Engagement program filter, when creating a smart list.
Flow	 **Definition:** The Flow in a Marketo smart campaign determines the steps that will run in the campaign. **Application:** Example - Marketo recognises a lead action, such as "Converted" in a Program - Marketo adds a lead to a list when they complete an action, such as filling out a form - Marketo sends a follow-up email to a lead when they register for an event **Where you might see this:** You will find this in Smart Campaigns.
Lead	**Definition:** Every Person in Marketo is considered a lead. Marketo makes the distinction between Lead and Contact via the "CRM Type" and "SFDC Type" field. This includes people who qualify as Contact or customers in the CRM system. **Application:** You will engage with leads through your programs. **Where you might see this:** Leads are stored in your Marketo database, and can be added to programs by using smartlists.

Program	**Definition:** A Program represents a single marketing initiative. **Application:** In Marketo, Programs are a group of activities oriented towards a specific outcome. Local assets are added to a program to set the functionality of the program. **Where you might see this:** Programs are found in the Marketing Activities section of Marketo. There are 4 program types in Marketo:
Program members	**Definition:** A member is a person that has a status in a program. **Application:** Leads are considered members of a Program once they have been targeted or have engaged with that Program. **Where you might see this:** People on the initial target list of an email Program will only become members once the email has been sent to them.
Program Statuses	**Definition:** Program statuses are defined within a Marketo Program to show at which stage leads are in the Program. **Application:** Program statuses correspond to a Channel, and can be customized by your Marketo Administrator. **Where you might see this:** For example; for a Webinar Program, a lead can be at the Invited/Registered/Attended/No Show/Attended on demand stage.
Segmentations	**Definition:** These are defined by smart list criteria, such as Region, Industry and other Marketo field values. **Application:** Segmentations are required before dynamic content can be set up. **Where you might see this:** Segmentations in Marketo are set up in the Lead Database section.
Smart Campaigns	**Definition:** Marketo smart campaigns follow the commands that have been set. They are instructions to let the campaign know what steps need to be taken. **Application:** They perform actions such as sending an email, adding a person to a specific list in your database, or moving a person to a new program status. **Where you might see this:** Smart campaigns can be either Batch or Triggered: Batch campaigns are running based on past activities. They can run immediately or at a scheduled time. Triggered smart campaigns listen for an activity that you predefine. When a lead opens an email, your Marketo smart campaign may:

	- Move that person into the “Opened Email” program status - Send them a follow up email
Smart List	**Definition:** Smart lists allow you to find specific groups of people using simple filters. **Application:** They are used all over Marketo, such as in smart campaigns, programs, reports, segmentations, business models, engagement programs, dynamic content, and more. **Where you might see this:** Depending on your needs, smart lists can be created in two places within Marketo: 1. In the Database, where they're available for shared/global use (e.g., "All Unsubscribed People"). 2. In programs as local assets, where they find a group of people who are relevant to that specific program (e.g., "Attended Tradeshow"). For example, to create a Smart List of all leads whose Country is Japan, whose IP data indicates they are located in Tokyo, who have the Job Title of IT Director, you would choose these filters from Lead Attributes:  Smart lists refresh themselves each time they are called and add any new leads that qualify.
Static List	**Definition:** Static lists are one of the most simple and useful features of Marketo. They are simply a list of names from your Database. **Application:** Static Lists in Marketo are created by the user and must be manually updated. They do not update themselves the way Smart Lists do. **Where you might see this:** You can create smart campaigns to add leads to a static list.
Stream	**Definition:** A stream is a series of emails which make up a part of a Marketo Engagement program. **Application:** Streams are oriented towards groups of leads that exhibit behavioral or demographic similarities. **Where you might see this:** Behavioral similarities such as new leads vs. leads which have already actively engaged with marketing. Demographic similarities such as region, language, industry, and so on.

Success	**Definition:** The success status refers to the Program status in a Marketo Program. **Application:** This is an automatic status change in Marketo, based on the criteria you have set up. **Where you might see this:** Once the status is 'Success' it indicates the outcome of a marketing Program is a success for that lead.
Tags	**Definition:** Tags are used to describe programs. You can make as many as you need, each with unique values. **Application:** Utilizing tags will assist you in filtering data for reporting purposes. **Where you might see this:** Tags can be appended to any Marketing Program in Marketo in the Setup tab.
Tokens	**Definition:** A token is a variable that can be used in Marketo smart campaign flow steps, emails, landing pages, snippets, and web campaigns. **Application:** A common use of tokens is to personalize your marketing. **Where you might see this:** A token can be added in an email to address the email to the lead by their first name {{lead.First Name}}. Marketo also has local "my" tokens, which can be created under folder or program. 

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Common reporting terms

Email Performance

Column	Definition
Clicked Link	Number of email recipients who clicked a link in the email.
Hard Bounced	When an email is rejected and cannot be sent for permanent reasons. For example, this may be due to a non-existent email address or an invalid domain name.
Pending	This number is calculated by subtracting the number of emails Delivered, Bounced, and Soft Bounced from the total number Sent.
Soft Bounced	When an email is rejected because of a temporary condition. For example, this may be due to the recipients email inbox being full therefore they cannot receive any more emails. Marketo would try to send those soft bounced email address thrice and mark them as hard bounce if they failed in all attempt.
Unsubscribed	Number of email recipients who clicked the **Unsubscribe** link in the email and filled out the form.

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Web Page Activity

Column	Definition
Person	The visitor's name, title, and company. Click to view person details and activity history.
First/Last Visit (Time zone)	Date and time of the first/last visit by anyone from this company.
Page Views	Number of pages loaded by this visitor. Click to view which pages were visited.
HTTP Referrer	URL of the page that contains the link the visitor followed to your page.
Entry Page	First page the person visited
Inferred Company or ISP	The company, as inferred from the visitors' IP address. Names in bold indicate this is the company, not the ISP.
Inferred Country, State/Region, & City	Geographic location of the visitor, as inferred from their IP address.

Program Performance

Column	Definition
Channel	The channel type of the program.
New Names	New people acquired by the program.
Success	Number of members who achieved success as defined in the program statuses.
Total Cost	Sum of all period costs within the program.

Email Link Performance

Column	Definition
Link	Grouped by email name. Click the plus (+) to see all links included that email.
Clicks	The number of times that link was clicked.
% Clicks	Of the total clicks on all links in that email, percentage on this link.
People	The number of unique people who clicked the link.
% People	Of the total unique people who clicked links in that email, percentage on this link.

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Company Web Activity

Column	Definition
Company	The visitors' company. Names in bold are confirmed to be the company name by at least one person.
Inferred Company or ISP	The company, as inferred from the visitors' IP address. Names in bold indicate this is the company, not the ISP.
Page Views	Number of pages loaded by the visitors.
People	Number of people from this company who visited your site.
Country, State/Region, & City	Geographic location of the company.
First/Last Visit (Time zone)	Date and time of the first/last visit by anyone from this company.