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
• 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 Activities’
• 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](ralumni.com/marketo) for a downloadable copy of this training, as well as other step by step and troubleshooting guides.