Activity Guide

Adobe Marketo Engage: Reporting and Insights

Adobe Digital Learning Services

Adobe Marketo Engage Reporting and Insights

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10152023

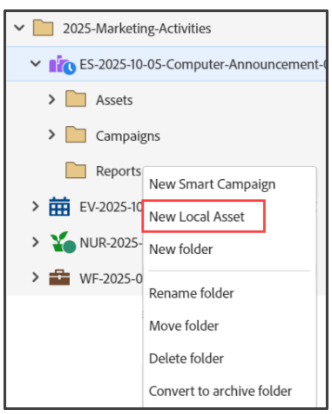
Contents

Module 2: Marketo Engage Standard Reports

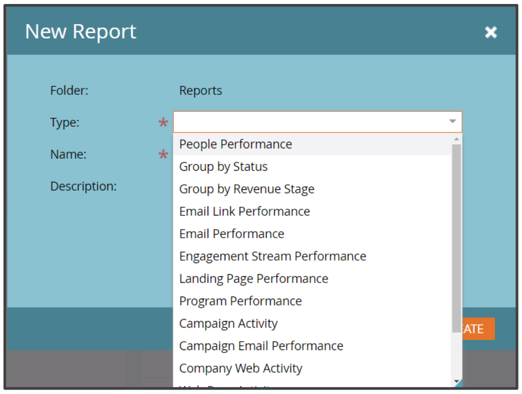
Demo 2.1: Create a Local Report

Do not perform these steps – your instructor will perform them in class.

1. Log in to Marketo Engage.
2. From the My Marketo dashboard, click **Marketing Activities** in the navigation bar (the black bar at the top of your screen). Marketo Engage displays the Marketing Activities section of the platform.
3. In the navigation tree, locate the program where you would like the report to be saved. Right-click on the name of the program. A dropdown menu appears.
4. In the dropdown menu, select **New folder**. The Create Folder dialog box appears.
5. In the Folder name field, type **Reports**.
6. In the navigation tree, right-click on the Reports folder. A dropdown menu appears.
7. In the dropdown menu, select **New Local Asset**. The New Local Asset dialog box appears.



8. In the New Local Asset dialog box, click **Report**. The New Report dialog box appears.
9. In the Type field, select the type of report you want to create from the dropdown menu.

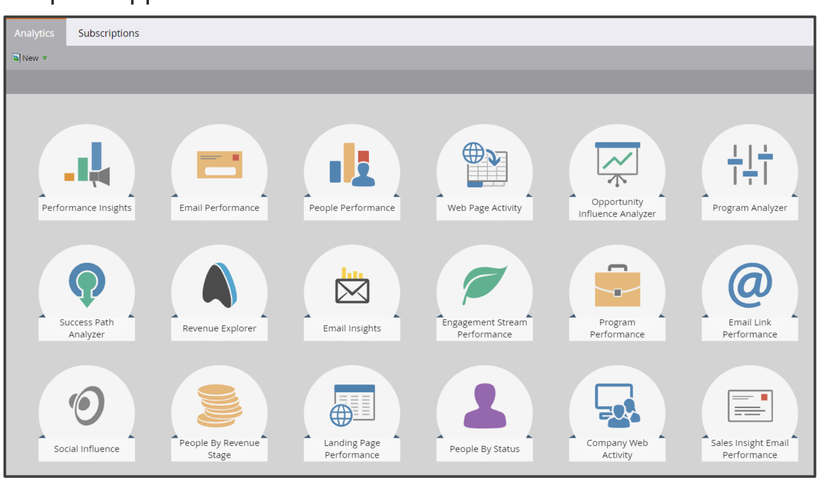


10. The Name field automatically updates to the type of report. You can update the name if you choose.
11. (Optional) In the Description field, type a description of your report.
12. Click **Create**. Marketo Engage creates your report in the navigation tree and displays the summary tab in your canvas.

Demo 2.2: Create a Global Report

Do not perform these steps – your instructor will perform them in class.

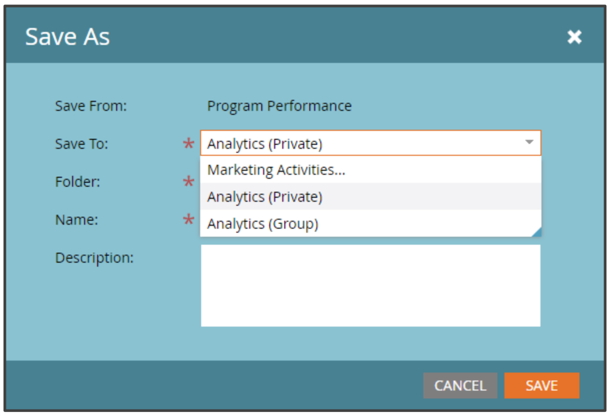
1. Click **Analytics** in the navigation bar (the black bar at the top of your screen). Marketo Engage displays the Analytics section of the platform.
2. From the Analytics home dashboard, click on the icon of report you want to create. The report template appears.



3. In the gray menu bar of the report template, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, select **Save As**. The Save As dialog box appears.

5. In the Save As dialog box, choose the appropriate **Save To** location based on where you want to save the report:

   - **Marketing Activities:** If selected, you need to choose a program where the report is saved. Because this report is saved in a program, it is considered a local report.
   - **Analytics (Private):** The report is saved in the Analytics section and will is visible only to you.
   - **Analytics (Group):** The report is saved in the Analytics area and is visible to all users who have access to the Analytics area of the workspace.



6. In the dialog box, if you selected to save the report in the Analytics area, in the Folder field, select the folder where you want to save the report.
7. In the dialog box, In the Name field, type a name for the report (required).

   Note that global report names must be unique.

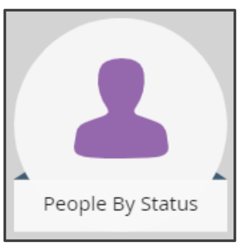
8. (Optional) In the dialog box, in the Description field, type a description for the report.
9. In the dialog box, click **Save**.

Module 3: People Reports

Activity 3.1: Create a People by Status Report

Create the Report

1. Click **Analytics** in the navigation bar (the black bar at the top of your screen). Marketo Engage displays the Analytics section of the platform.
2. In the navigation tree, right-click on the **Group Reports** folder. A dropdown menu appears.
3. In the dropdown menu, select **New folder**. The Create Folder dialog box appears.
4. In the Create Folder dialog box, in the Folder Name field, type **Learning-*your student number-your initials*** (example: **Learning-00-JK**).
5. In the Analytics home dashboard, click on the **People by Status** icon. The report template appears.



6. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
7. In the dropdown menu, click **Save As**. The Save As dialog box appears.
8. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
9. In the Save As dialog box, in the Folder field, select your **Learning** folder (example:. **Learning-00-JK**).
10. In the Save As dialog box, in the Name field, type **People-By-Status-*your student number-your initials***.
11. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
12. In the Save As dialog box, click Save. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

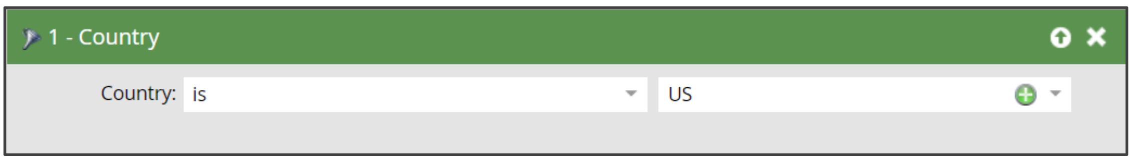
Adjust Report Settings

1. In the canvas, click on the report **Setup** tab.

2. In the canvas, double-click on the **Person Created At** line. The Person Created At dialog box appears.
3. In the dialog box, in the Person Created At dropdown menu, select **All Time.**
4. In the dialog box, click **Save**.

Add a Smart List Filter

1. In the canvas, click on the report **Smart List** tab.
2. In the right-hand filter menu, search for **Country**. The Country filter appears in the search results.
3. Drag-and-drop the **Country** filter into your canvas.
4. In the Country select field, type **US**.

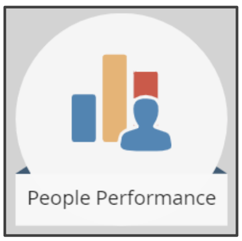


5. To view the report data, click on the **Report** tab. Marketo Engage displays the report data.

Activity 3.2: Create a People Performance Report with Opportunity Columns

Create the Report

1. To return to the Analytics dashboard, click on the name of the workspace in the navigation tree.
2. In the Analytics dashboard, click on the **People Performance** icon. The report template appears.

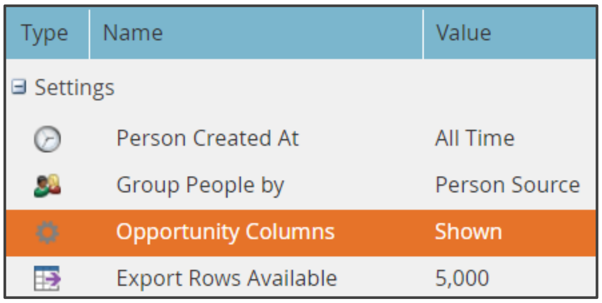


3. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, click **Save As**. The Save As dialog box appears.
5. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
6. In the Save As dialog box, in the Folder field, select your **Learning** folder (example:. **Learning-00-JK**).
7. In the Save As dialog box, in the Name field, type **People-By-Source-*your student number-your initials*.**
8. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
9. In the dialog box, click **Save**. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

Adjust Report Settings

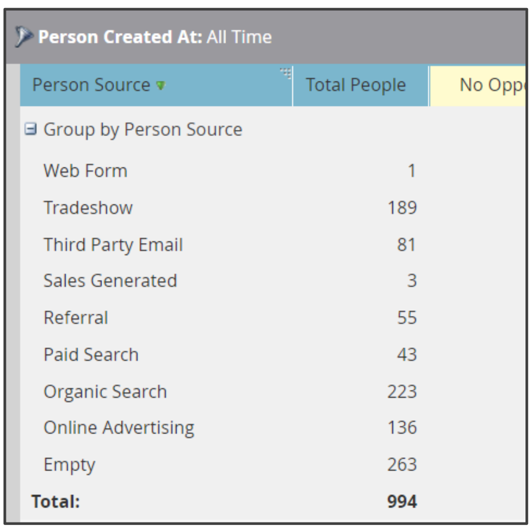
1. In the canvas, click on the report **Setup** tab.
2. In the canvas, double-click on the **Person Created At** line. The Person Created At dialog box appears.
3. In the dialog box, in the Person Created At dropdown menu, select **All Time.**
4. In the dialog box, click **Save**.
5. In the canvas, double-click on the **Group People By** line. The Group People By dialog box appears.
6. In the dialog box, in the Group By field, select **Person Source** from the dropdown menu.
7. In the dialog box, click **Save**.

8. In the canvas, double-click on the **Opportunity Columns** line. The Opportunity Columns dialog box appears.
9. In the dialog box, in the Opportunity Columns field, select **Shown** from the dropdown menu.
10. In the dialog box, click **Save**.



Type	Name	Value
Settings		
	Person Created At	All Time
	Group People by	Person Source
	Opportunity Columns	Shown
	Export Rows Available	5,000

11. In the canvas, click on the **Report** tab to view the report data.

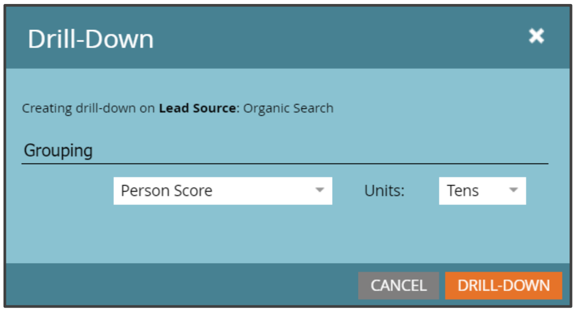


Person Created At: All Time

Person Source	Total People	No Opp
Group by Person Source		
Web Form	1	
Tradeshow	189	
Third Party Email	81	
Sales Generated	3	
Referral	55	
Paid Search	43	
Organic Search	223	
Online Advertising	136	
Empty	263	
Total:	**994**	

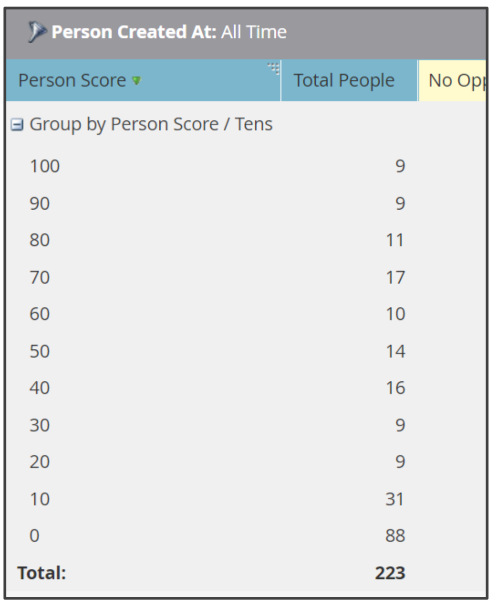
Drill Down on a Line in the Report

1. In the Reports tab, select the row for the source that you want to learn more about.
2. In the gray menu bar, select the **Drill Down** button. The Drill-Down dialog box appears.
3. In the dialog box, in the Grouping field, select **Person Score** from the dropdown menu.
4. In the dialog box, in the Units field, select **Tens** from the dropdown menu.
5. In the dialog box, click **Drill-Down**. The drill down report opens in a new browser tab or window.



If the drill-down report does not open automatically in a new browser tab or window, adjust your browser settings to allow pop-ups from Marketo Engage and try again.

6. View the drill-down report data.



Person Created At: All Time

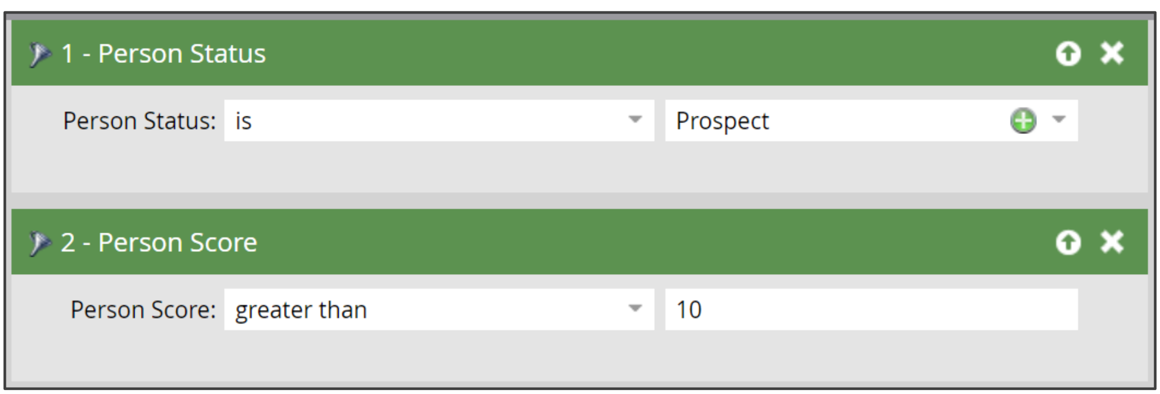
Person Score	Total People	No Opp
Group by Person Score / Tens		
100	9	
90	9	
80	11	
70	17	
60	10	
50	14	
40	16	
30	9	
20	9	
10	31	
0	88	
Total:	**223**	

Activity 3.3: Create a People Performance Report with Custom Columns

Create a Smart List in the Database

1. Click **Database** in the navigation bar (the black bar at the top of your screen). Marketo Engage displays the Database section of the platform.
2. In the navigation tree, right-click on the **Group Smart Lists** folder. A dropdown menu appears.
3. In the dropdown menu, select **New folder**. The Create Folder dialog box appears.

4. In the Create Folder dialog box, in the Folder Name field, type **Smart-Lists-for-Report-Custom-Columns-*your student number-your initials*** (example: **Smart-Lists-for-Report-Custom-Columns-00-JK**).
5. In the navigation tree, right-click on your **Smart-Lists-for-Report-Custom-Columns** folder. A dropdown menu appears.
6. In the dropdown menu, select **New Smart List**. The New Smart List dialog box appears.
7. In the dialog box, in the Name field, type **Engaged-Prospects-*your student number-your initials*** (example: **Engaged-Prospects-00-JK**).
8. (Optional) In the dialog box, in the Description field, type a description of your Smart List.
9. In the dialog box, click **Create**. Marketo Engage creates your Engaged-Prospects Smart List within your Smart-Lists-for-Report-Custom-Columns folder.
10. In the Smart List Search menu on the right side of the canvas, search for the filter **Person Status.**
11. Select the **Person Status** filter and drag-and-drop it into your canvas.
12. In the Person Status Search field, select **Prospect** from the dropdown menu.
13. In the Smart List Search menu on the right side of the canvas, search for the filter **Person Score**.
14. Select the **Person Score** filter and drag-and-drop it into your canvas.
15. In the Person Score operator menu, select **greater than** from the dropdown menu.
16. In the Person Score number field, type 10.



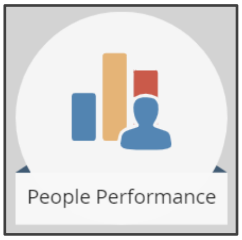
17. In the canvas, click on the **People** tab to view the members of the Smart List.

Create the Report

1. Click **Analytics** in the navigation bar (the black bar at the top of your screen). Marketo Engage

displays the Analytics section of the platform.

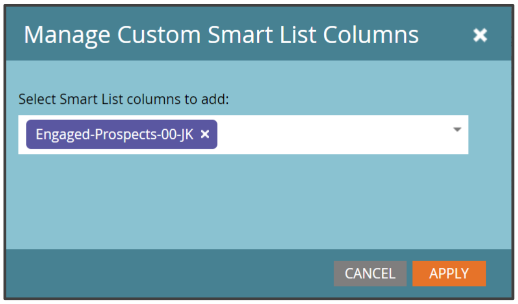
2. In the Analytics dashboard, click on the **People Performance** icon. The report template appears.



3. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, click **Save As**. The Save As dialog box appears.
5. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
6. In the Save As dialog box, in the Folder field, select your **Learning** folder (example: **Learning-00-JK**).
7. In the Save As dialog box, in the Name field, type **People-By-Source-*your student number-your initials*.**
8. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
9. In the dialog box, click **Save**. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

Adjust Report Settings

1. In the canvas, click on the report **Setup** tab.
2. In the canvas, double-click on the **Person Created At** line. The Person Created At dialog box appears.
3. In the dialog box, in the Person Created At dropdown menu, select **All Time.**
4. In the dialog box, click **Save**.
5. In the canvas, double-click on the **Group People By** line. The Group People By dialog box appears.
6. In the dialog box, in the Group By field, select **Country** from the dropdown menu.
7. In the dialog box, click **Save**.
8. In the Settings menu on the right side of the canvas, select **Custom Columns** and drag-and-drop it into your canvas. The Manage Custom Smart List Columns dialog box appears.
9. In the dialog box, select your **Engaged-Prospects** Smart List from the dropdown menu.



10. In the dialog box, click **Apply**.

Type	Name	Value
Settings		
	Person Created At	All Time
	Group People by	Country
	Opportunity Columns	Hidden
	Export Rows Available	5,000
	Custom Columns	Engaged-Prospects-00-JK

11. In the canvas, click on the **Report** tab to view the report data.

Person Created At: All Time

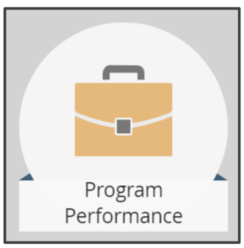
Country	Total People	Engaged-Prospects-...
Group by Country		
US	595	70
CA	84	9
UK	78	0
MX	50	3
SG	34	11
IE	25	7
AU	22	6
CN	21	8
JP	18	3
GH	11	2
NZ	9	2

Module 4: Program Performance Report

Activity 4.1: Create a Program Performance Report

Create the Report

1. At the top of the navigation tree, click on the name of your workspace. Marketo Engage displays the Analytics home dashboard.
2. In the Analytics home dashboard, click on the **Program Performance** icon. The report template appears.

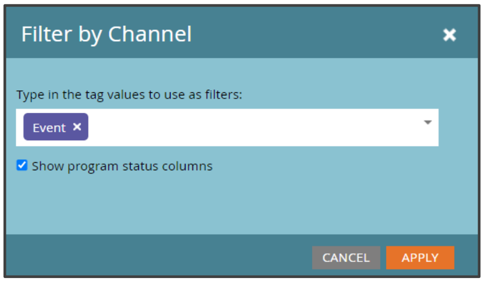


3. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, click **Save As**. The Save As dialog box appears.
5. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
6. In the Save As dialog box, in the Folder field, select your **Learning** folder (example: **Learning-00-JK**).
7. In the Save As dialog box, in the Name field, type **Program-Performance-*your student number-your initials***.
8. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
9. In the Save As dialog box, click **Save**. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

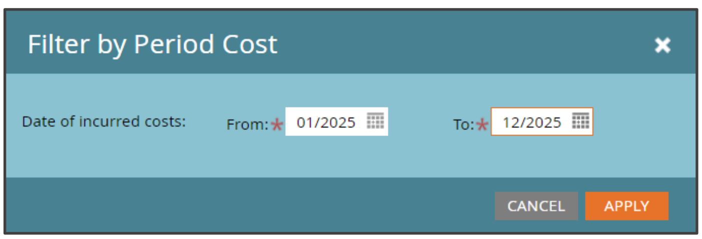
Adjust Report Settings

1. In the canvas, click on the report **Setup** tab.
2. In the Settings menu on the right side of the canvas, select **Channel** and drag-and-drop it into your canvas. The Filter by Channel dialog box appears.
3. In the dialog box, select the **Event** channel from the dropdown menu.

4. In the dialog box, check the Show Program Status Columns checkbox.
5. In the dialog box, click **Apply**.



6. In the Settings menu on the right side of the canvas, select **Period Cost** and drag-and-drop it into your canvas. The Filter By Period Cost dialog box appears.
7. In the dialog box, select the timeframe (by month) for the programs that you want to include in the report (for example, programs in the last 12 months).



8. In the dialog box, click **Apply**.
9. In the canvas, click on the **Report** tab to view the report data. Any programs using the Event channel during that timeframe populate in the report with program status columns.

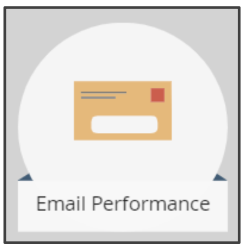
Note that data may not populate for this activity in some Marketo Engage training instances.

Module 5: Email Reports

Activity 5.1: Create an Email Performance Report

Create the Report

1. At the top of the navigation tree, click on the name of your workspace. Marketo Engage displays the Analytics home dashboard.
2. In the Analytics home dashboard, click on the **Email Performance** icon. The report template appears.



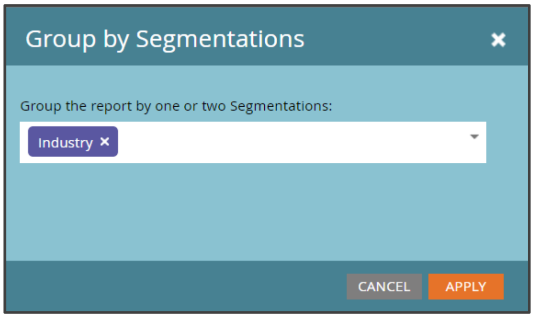
3. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, click **Save As**. The Save As dialog box appears.
5. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
6. In the Save As dialog box, in the Folder field, select your **Learning** folder (example: **Learning-00-JK**).
7. In the Save As dialog box, in the Name field, type **Email-Performance-by-Industry-*your student number-your initials***.
8. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
9. In the Save As dialog box, click **Save**. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

Adjust Report Settings

1. In the canvas, click on the report **Setup** tab.
2. In the canvas, double-click on the **Sent Date** line. The Sent Date dialog box appears.
3. In the dialog box, in the Sent Date field, select **Last 12 Months** from the dropdown menu.
4. In the dialog box, click **Save**.
5. In the Settings menu on the right side of the canvas, select **Group by Segmentations** and drag-and-

drop it into your canvas. The Group by Segmentations dialog box appears.

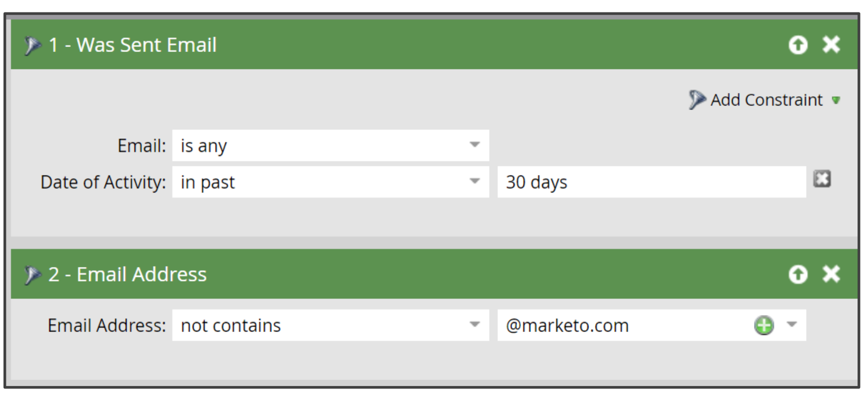
6. In the dialog box, select the **Industry** segmentation from the dropdown menu.



7. In the dialog box, click **Apply**.

Filter the Report Smart List to Exclude Your Company's Employees

1. In the canvas, click on the report **Smart List** tab.
2. In the Smart List Search menu on the right side of the canvas, search for the **Was Sent Email** filter.
3. Select the **Was Sent Email** filter and drag-and-drop it into your canvas.
4. In the Was Sent Email operator menu, select **is any** from the operator dropdown menu.
5. In the Smart List Search menu on the right side of the canvas, search for the **Email Address** filter.
6. Select the **Email Address** filter and drag-and-drop it into your canvas.
7. In the Email Address operator menu, select **not contains** from the operator dropdown menu.
8. In the Enter Email field, type **your company's email domain** (for example: **@marketo.com**).



9. In the canvas, click on the **Report** tab to view the report data.

Note that data may not populate for this activity in some Marketo Engage training instances.

Demo 5.1: Create an Email Insights Chart

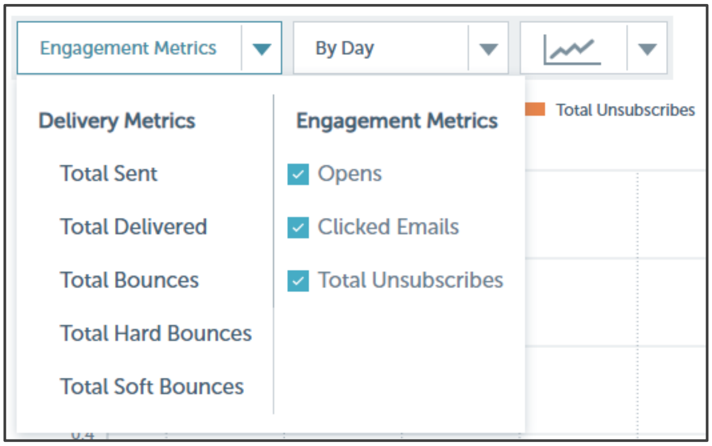
Do not perform these steps – your instructor will perform them in class.

Create the Report

1. At the top of the navigation tree, click on the name of your workspace. Marketo Engage displays the Analytics home dashboard.
2. In the Analytics home dashboard, click on the **Email Insights** icon. Email Insights opens in a new browser tab.

Adjust Report Settings

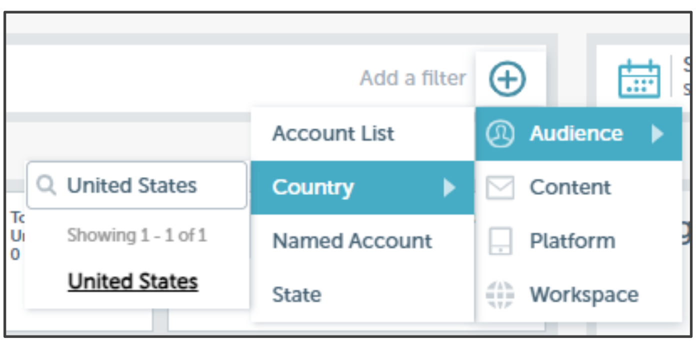
1. Above the chart, in the Metrics dropdown menu, select Engagement Metrics (Opens, Clicked Emails, Total Unsubscribes).
2. Above the chart, in the Group By dropdown menu, select By Time. A sub-dropdown menu appears.
3. In the sub-dropdown menu, select By Day.
4. Above the chart, in the Graph Type dropdown menu, select the Line Graph icon.



Note: Data in Email Insights does not refresh in real time. It can take up to eight hours for data to reflect in Email Insights.

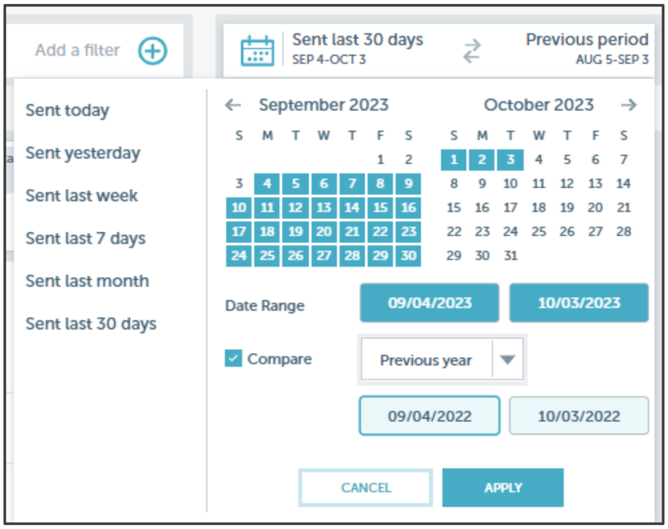
Filter the Report

1. At the top of the screen, click **Add a Filter**. A dropdown menu appears.
2. In the dropdown menu, select Audience. A sub-dropdown menu appears.
3. In the sub-dropdown menu, select **Country**. The Country sub-dropdown menu appears.
4. In the Country sub-dropdown menu, select the **United States** checkbox.



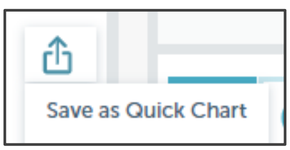
Adjust Report Timeframe

1. In the upper-right corner of the screen, click in the **Time Frame** box. The Time Frame dialog box appears.
2. In the dialog box, select **Sent Last 30 Days**.
3. In the dialog box, check the **Compare** checkbox.
4. In the dialog box, in the Comparison dropdown meu, choose **Previous Year**.
5. In the dialog box, click **Apply**.



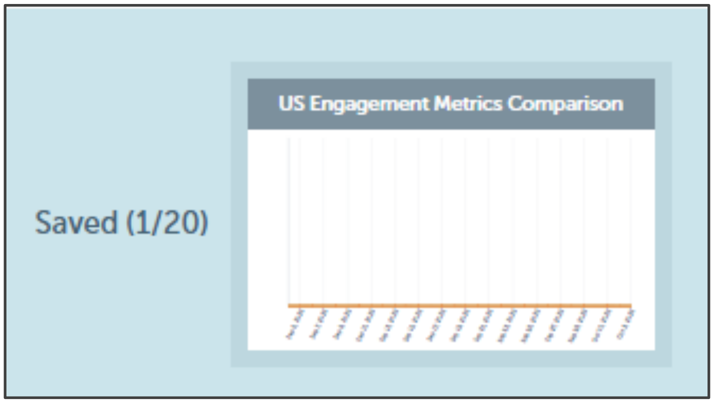
Save a Quick Chart

1. In the upper-right corner of the chart, click the **Export icon**. A dropdown menu appears.
2. In the dropdown menu, select **Save as Quick Chart**. A dialog box appears.



3. In the dialog box, in the empty field, type a name for your Quick Chart (example: **US Engagement Metrics Comparison**).

4. In the dialog box, click **Save**. Your Quick Chart appears at the top of the screen in the blue Quick Charts bar.



5. To view your Quick Chart at any time, click the **Quick Charts** button in the upper right corner of the screen and select your Quick Chart in the blue bar.

   Note: You can have to up 20 Quick Charts. They can be deleted and replaced.

6. Close the Email Insights browser tab.

Module 7: Web Reports

Activity 7.1: Create a Company Web Activity Report

Create the Report

1. At the top of the navigation tree, click on the name of your workspace. Marketo Engage displays the Analytics home dashboard.
2. In the Analytics home dashboard, click on the **Company Web Activity** icon. The report template appears.

3. In the gray menu bar, click on **Report Actions**. A dropdown menu appears.
4. In the dropdown menu, click **Save As**. The Save As dialog box appears.
5. In the Save As dialog box, in the Save To field, select **Analytics (Group)**.
6. In the Save As dialog box, in the Folder field, select your **Learning** folder (example: **Learning-00-JK**).
7. In the Save As dialog box, in the Name field, type **Anonymous-Company-Web-Activity-*your student number-your initials***.
8. (Optional) In the Save As dialog box, in the Description field, type a description of your report.
9. In the Save As dialog box, click **Save**. Marketo Engage creates your report in the navigation tree. The report Summary tab is displayed.

Adjust Report Settings

1. In the canvas, click on the report **Setup** tab.
2. In the canvas, double-click on the **Date of Activity** line. The Date of Activity dialog box appears.
3. In the dialog box, in the Date of Activity field, select **All Time** from the dropdown menu.
4. In the dialog box, click **Save**.

5. In the canvas, double-click on the **Activity Source** line. The Activity Source dialog box appears.

6. In the dialog box, in the Activity Source field, select **Anonymous Visitors (not including ISPs)**.

7. In the dialog box, click **Apply.**

8. In the canvas, click on the **Report** tab to view the report data.