BARCLAYS x Adobe

TV EMEA - Barclays Workfront Marketo HOL

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1. Welcome



Welcome to the Barclays x Adobe Hands-On Lab!

1.1. Personalising your Hands-on Experience

We added some magic to our documentation that allows you to save some information and when you do the guide will update to reflect your personal information.

Login credentials

You should login with your Barclays email address

First Name	Last Name	Email
Caitlin	Clements	caitlin.clements@barclays.com
Amy	Arifin	amy.arifin@barclays.com
Amy	Mignosi	amy.mignosi@barclays.com
Danian	Martinez	danian.martinez@barclays.com
Emilie	Uzan	Emilie.Uzan@barclays.com
Kari	Herrig	kari.herrig@barclays.com
Mercedes	Elguezabal	mercedes.elguezabal@barclays.com
Nadia	Sheikh	nadia.sheikh@barclays.com
Robin	Mather	rob.mather@barclays.com
Ronald	Lofrese	ronald.lofrese@barclays.com

Once you enter the email address, you will be send an one time pin for authorisation.

Enter that one and fill in the form to continue and submit the details to log in.

Let's start by adding the some personalisation to the guide using some information about you.

1. Fill out the input fields below, make sure
    1. **Your initials**:
       Abbreviate your name. Should not contain spaces. For example: Nirmal Jose would be `nirmalj`. It's important that this is a unique name.

2. **Your email address**

   Make sure the email address in the file matches your Barclays email address. This is the email address we added to you test profile.

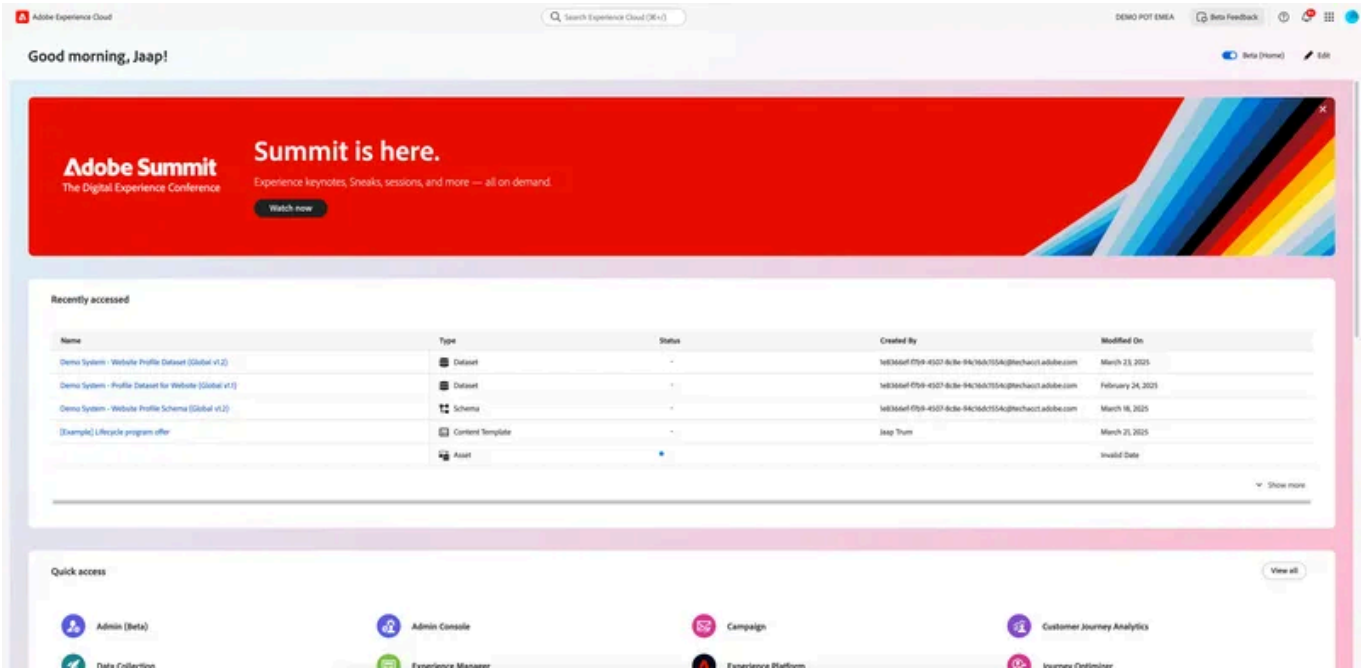
Your initials	{{CUSTOMER_NAME_INPUT}}
Your email address	{{CUSTOMER_EMAIL_INPUT}}

1.2. Logging into the platform

User accounts have been created to access the Adobe Experience Cloud and all of the tools you'll need in today's workshop.

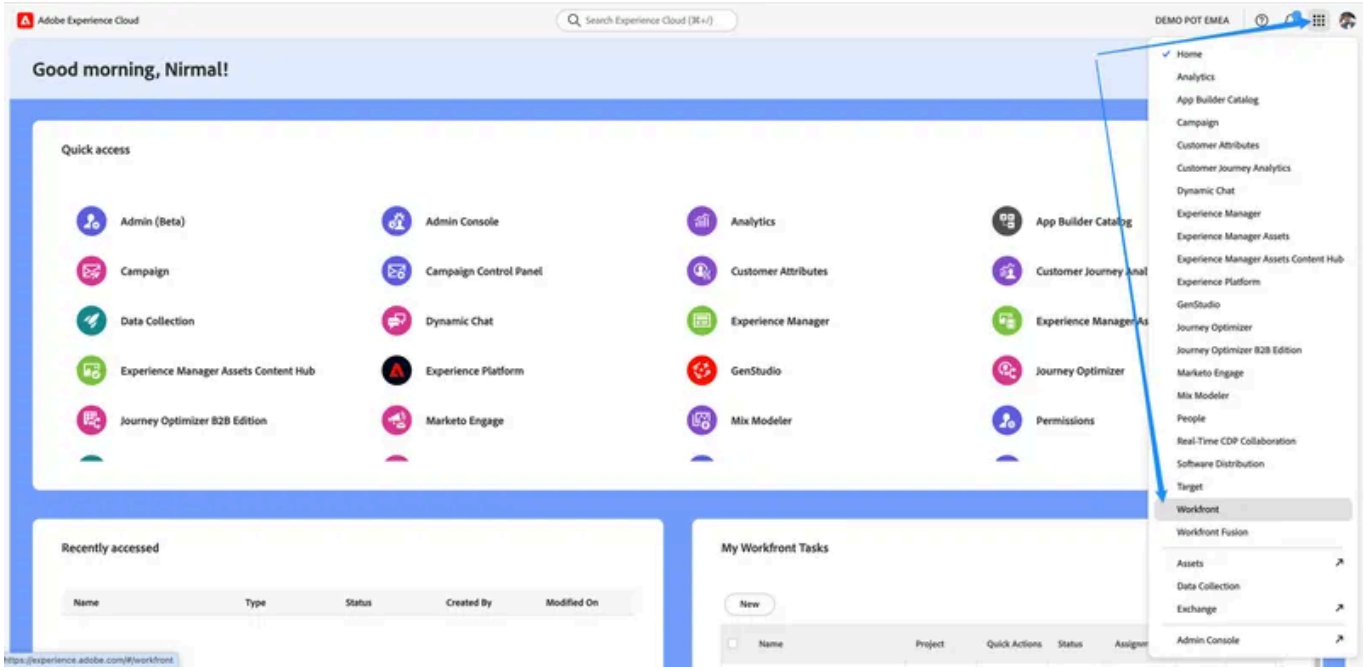
Login to Adobe Experience Cloud

1. Make sure you completed **Personalising your Hands-on Experience**.
2. Navigate to **Adobe Experience Cloud Homepage**
3. Logout if you are already logged in on your own or corporate Adobe account
4. Sign in using your Barclays email address
5. You'll be redirected back to Adobe Experience Platform in the Adobe Experience Cloud home dashboard

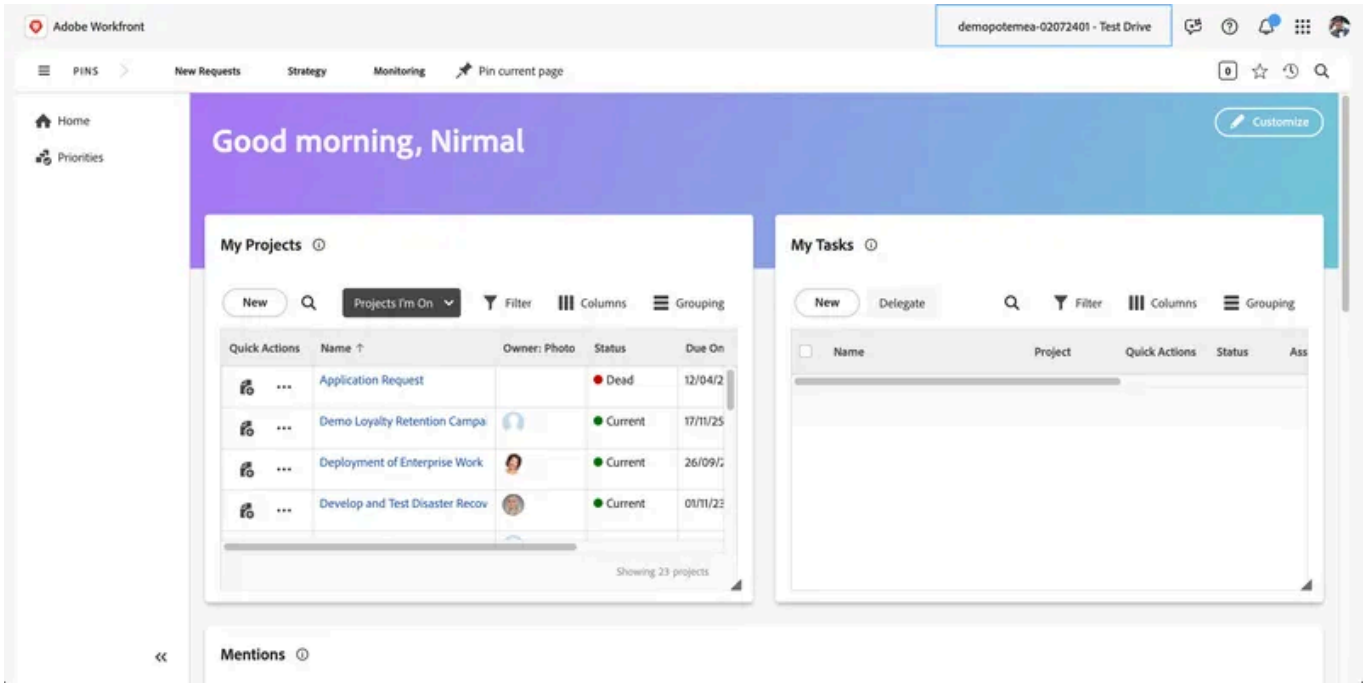


Navigating to Adobe Workfront

Click on the **navigation-icon** (9 dots) in the top right and select **Workfront** in the dropdown list.



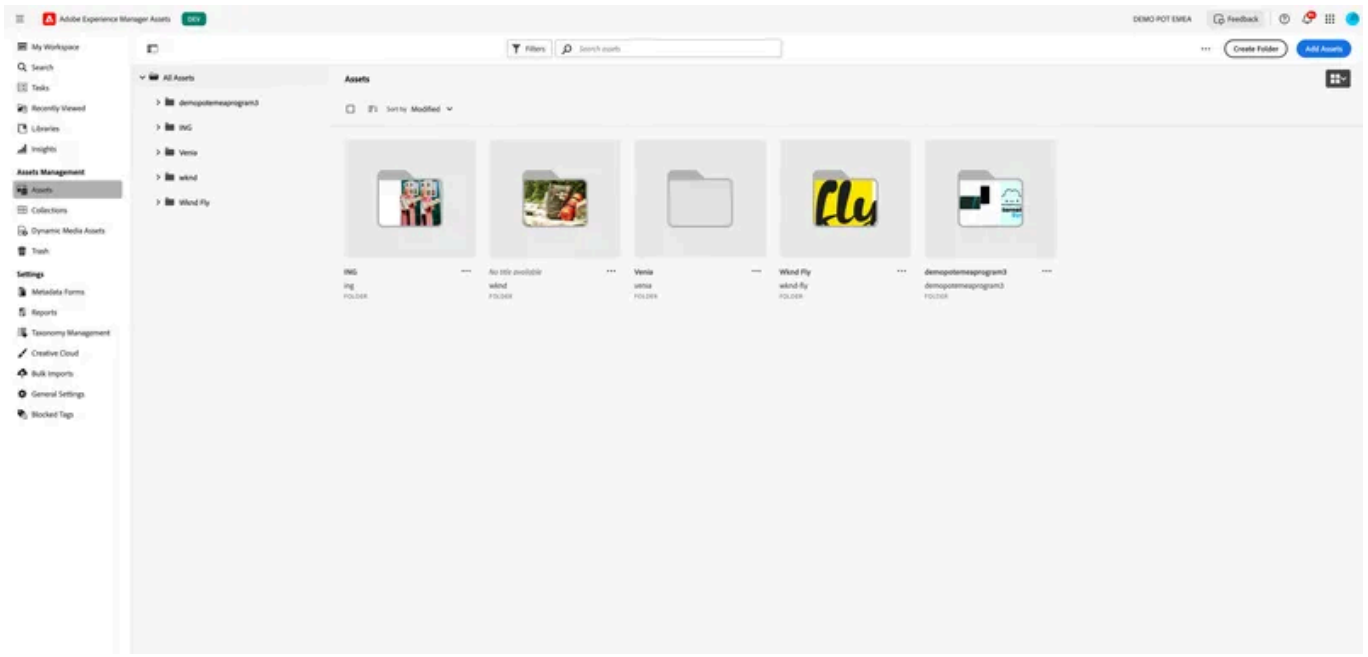
This should land you to workfront homepage. Please ensure the environment is `demopotemea-02072401 - Test drive`



Experience Manager Assets

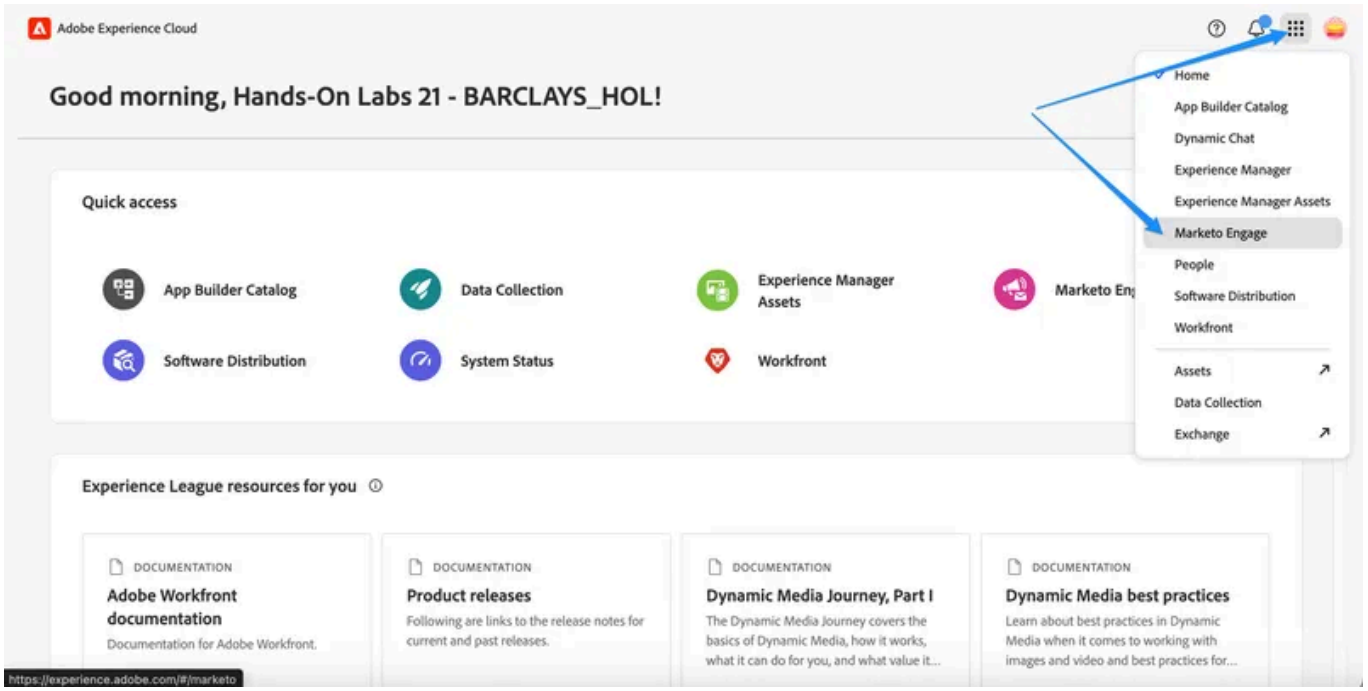
Click on the **navigation-icon** (9 dots) in the top right and select **Experience Manager Assets** in the dropdown list.

1. You'll see a large visual with a search bar. Click on **Browse Assets** to open the full workspace.

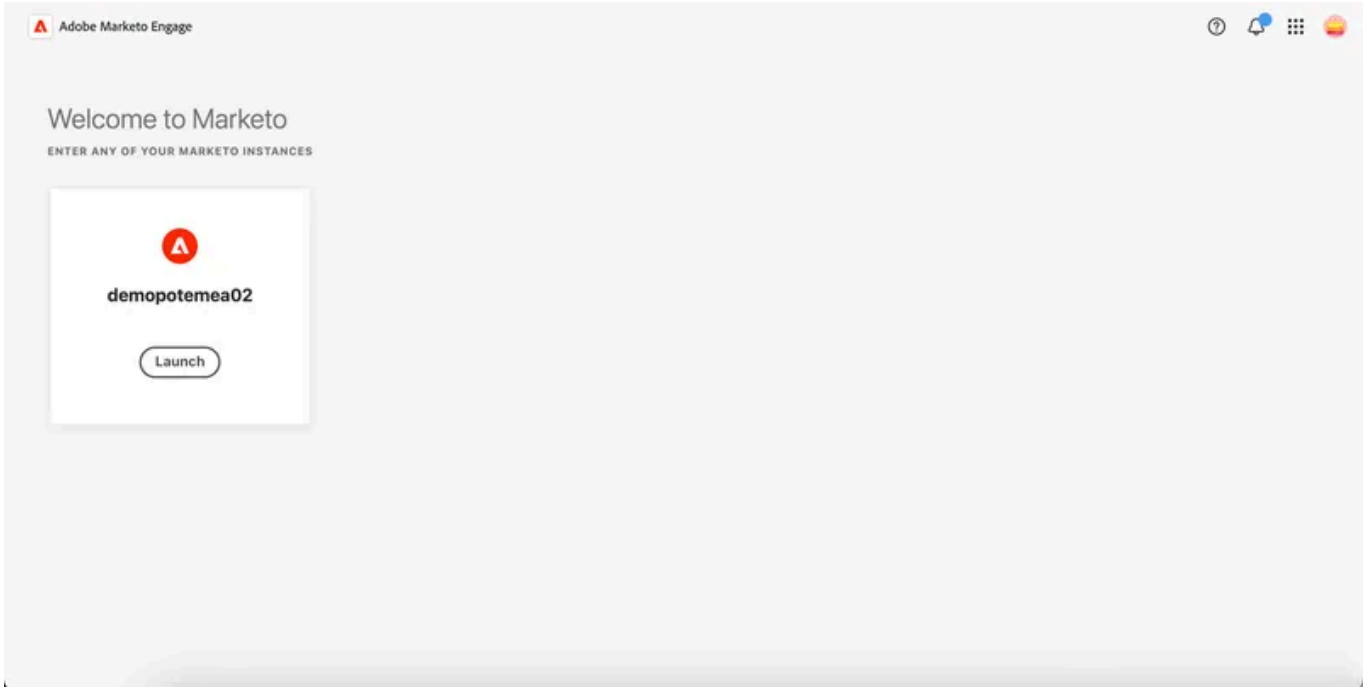


Marketo Engage

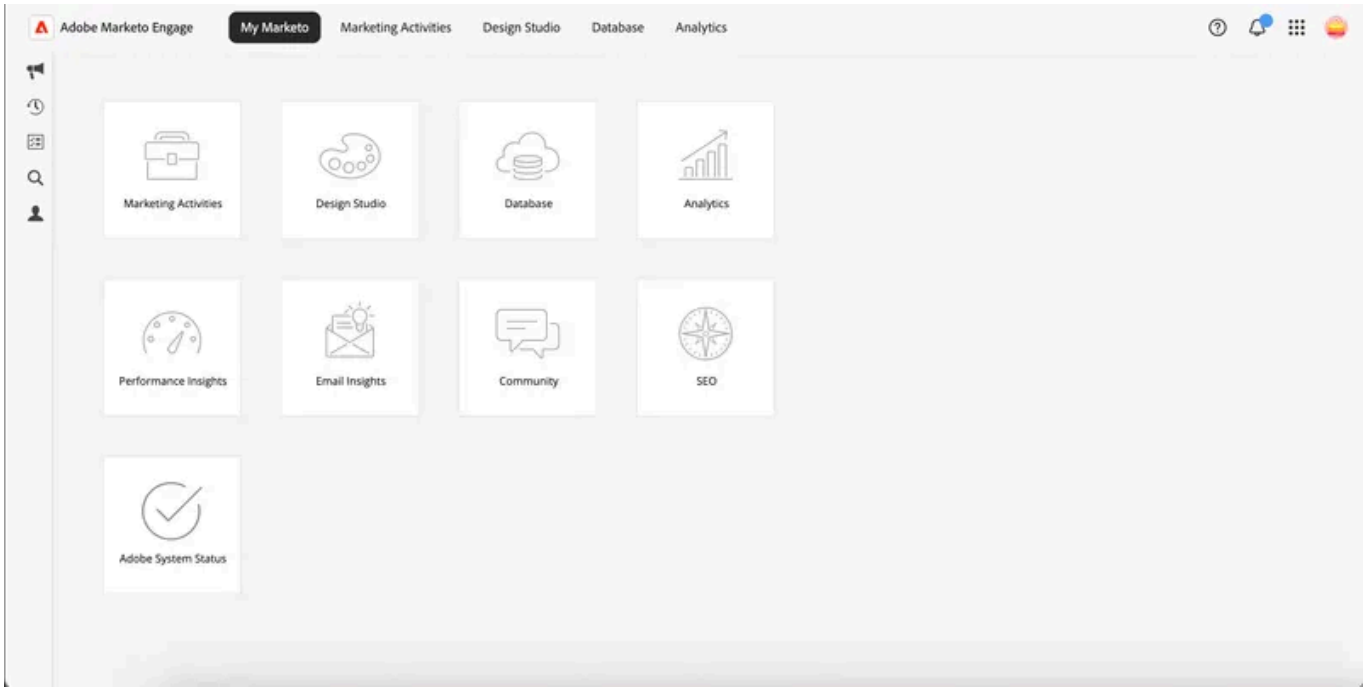
Click on the **navigation-icon** (9 dots) in the top right and select **Marketo Engage** in the dropdown list.



You'll see all your marketo instances. Click on **Launch** to open the marketo instance. In our case the instance name is `demopotemea02`



You will land on marketo landing page as below.



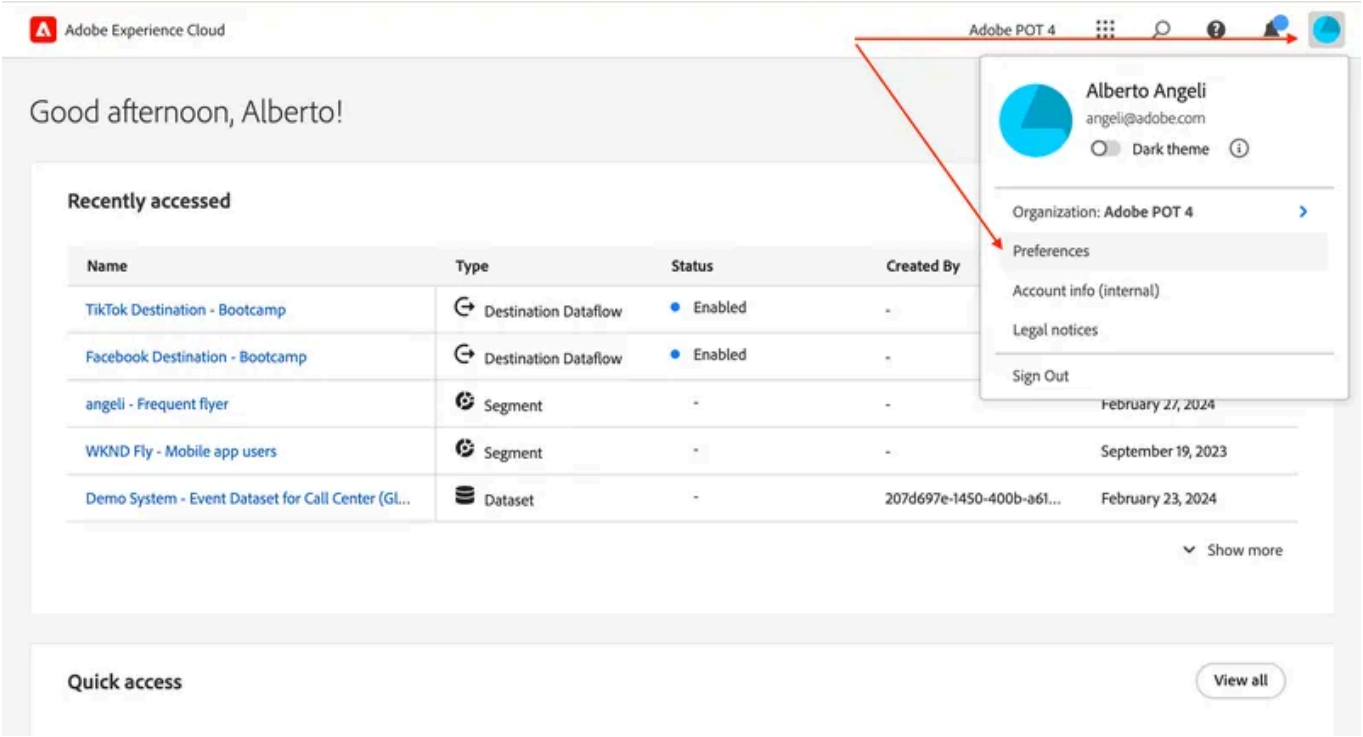
Set language preferences

This guide is written in English and the screenshot are taken from a UI set for English language. If your UI is set to use other language, it can be difficult to recognise buttons, labels and text. We suggest you to switch your Adobe account preferred language to English.

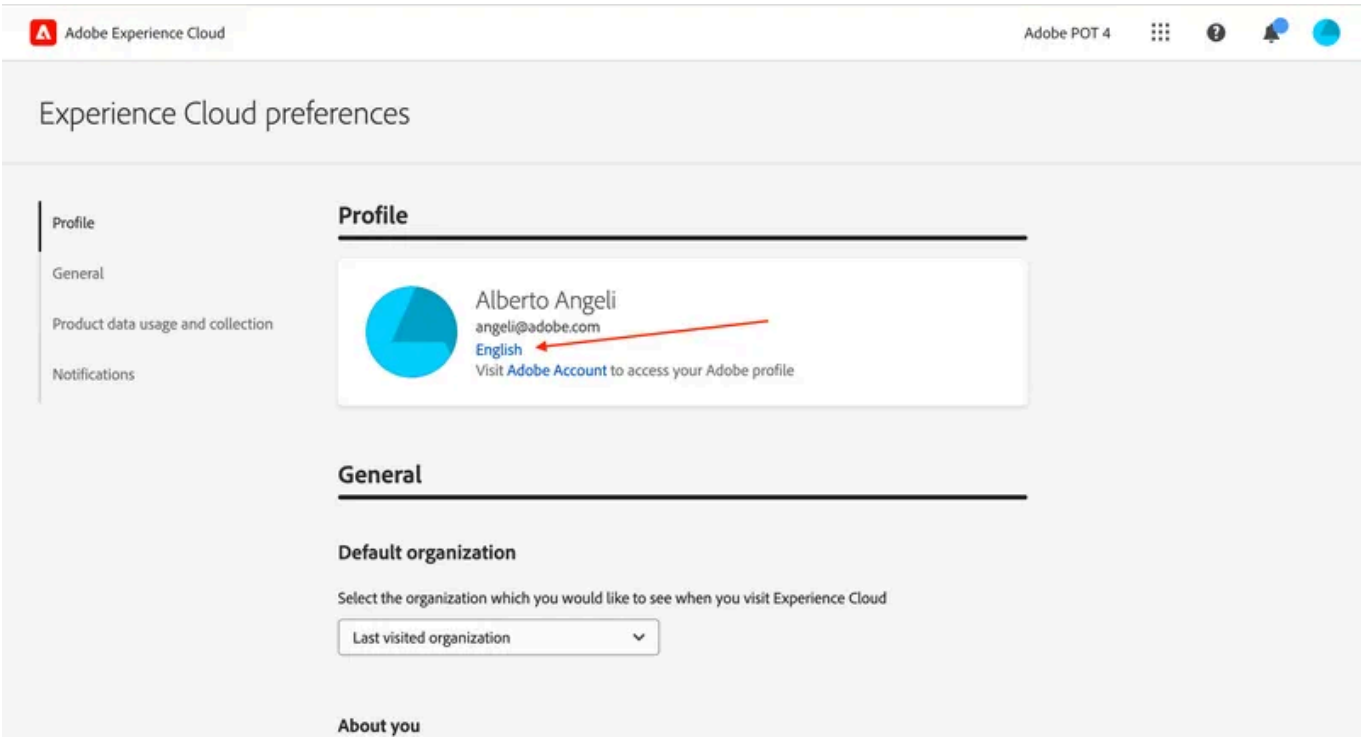
To change the preferences:

- click on the profile icon on the top right corner;

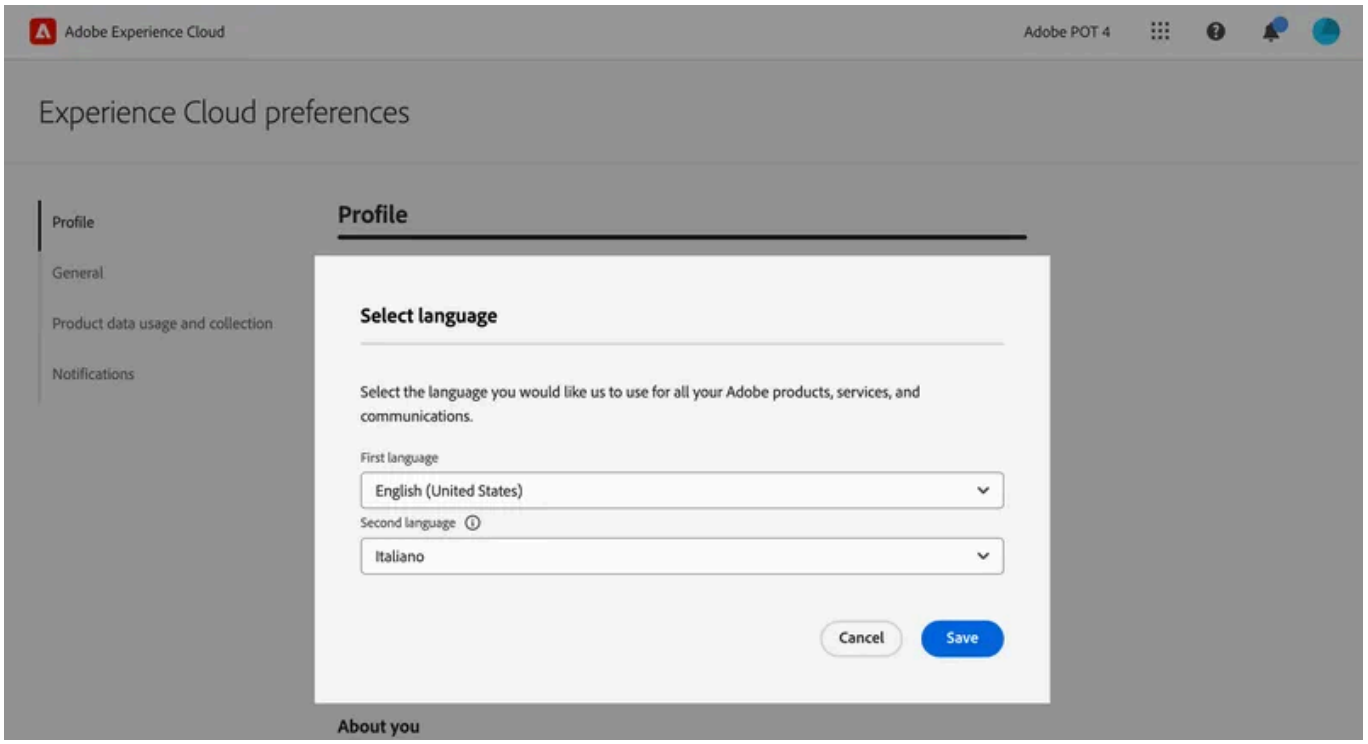
- click on Preferences.



- Click on the language label just below your name.



- Select `English (United States)` as First language;
- select your preferred language as Second language;
- click **Save**.


Adobe Experience Cloud
Adobe POT 4
Experience Cloud preferences
Profile
General
Product data usage and collection
Notifications
Profile
Select language
Select the language you would like us to use for all your Adobe products, services, and communications.
First language
English (United States)
Second language
Italiano
Cancel
Save
About you

2. Lab 1 - Planning & Production

2.1. Workflow & Planning

Introduction

Effective campaign execution begins with structured planning. This stage includes **Brief Submission, Timeline Review, and Project Execution**, ensuring seamless coordination across teams. Workfront plays a key role in managing tasks, resources, and approvals efficiently.

Learning Objectives

- Learn how to submit campaign brief and track approvals.
- Understand timeline reviews and milestone tracking in Workfront.
- Explore best practices for executing marketing projects efficiently.

2.1.1. Submitting a brief

Introduction

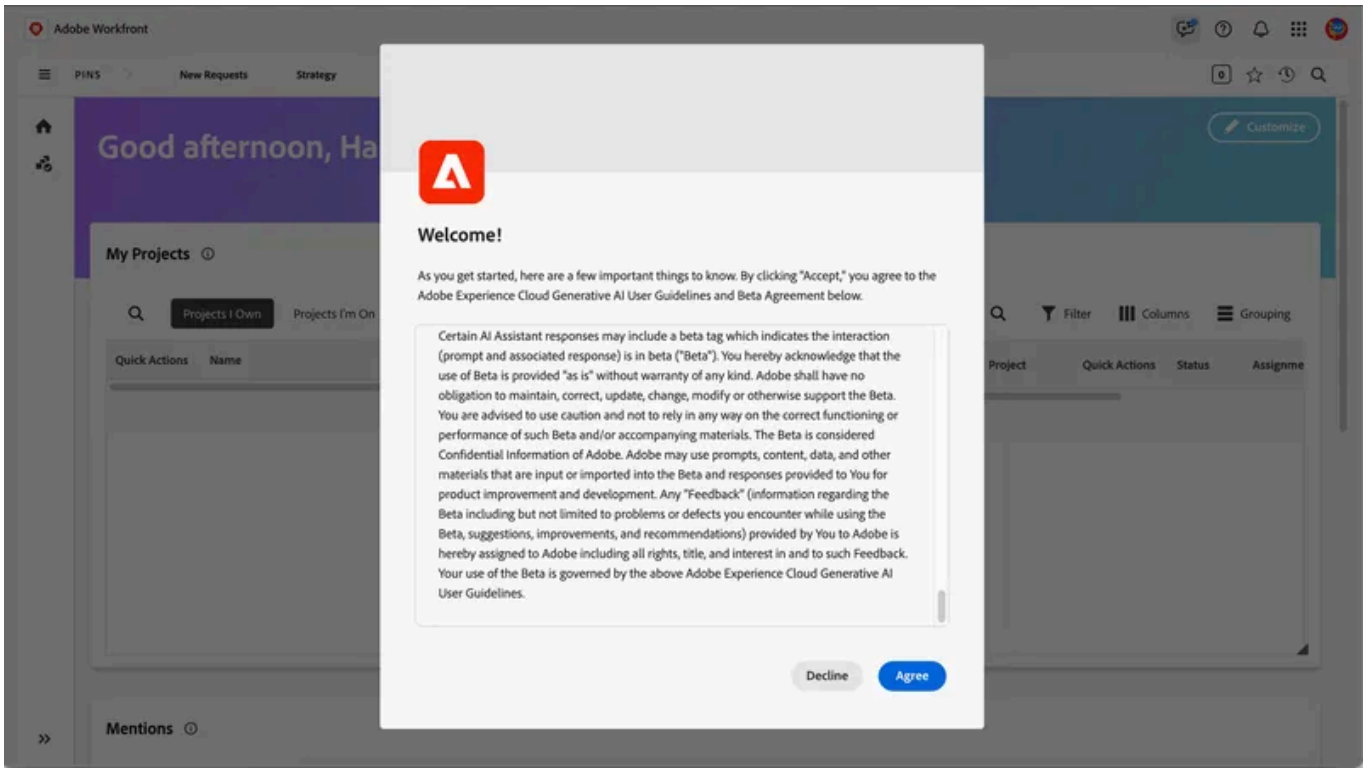
Now that we found an oppurtunity lets submit a request for buliding it.

Workfront request is the centralised placed to submit all types of requests in for the organisation.

Logging into workfront

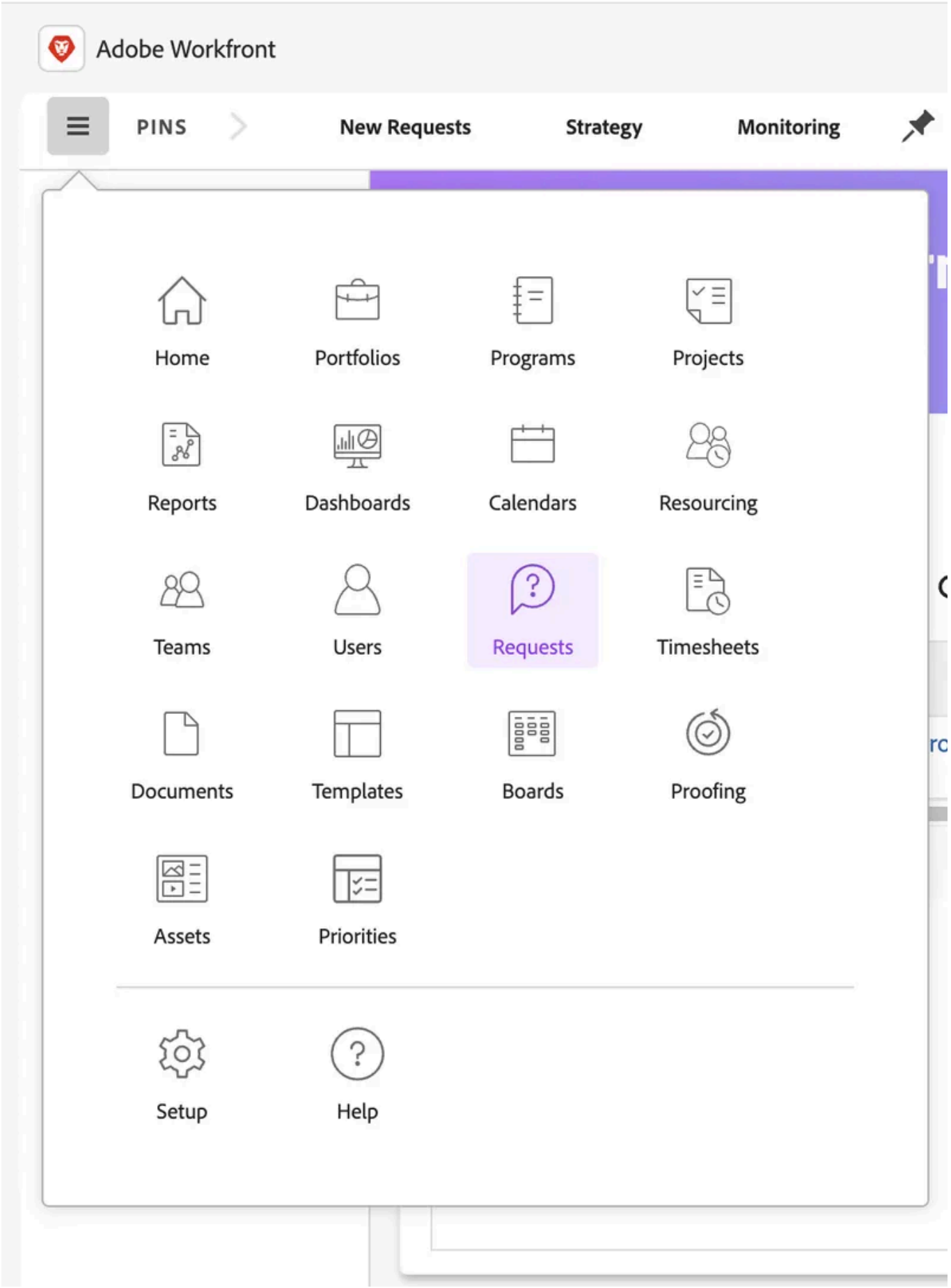
We will be starting from workfront Home. You can navigate to workfront home by following **Logging into the platform** > Navigating to workfront section.

In case you see a GenAI agreement popup, scroll to the end and click on Agree. This is needed for the usage of AI assistant in workfront.



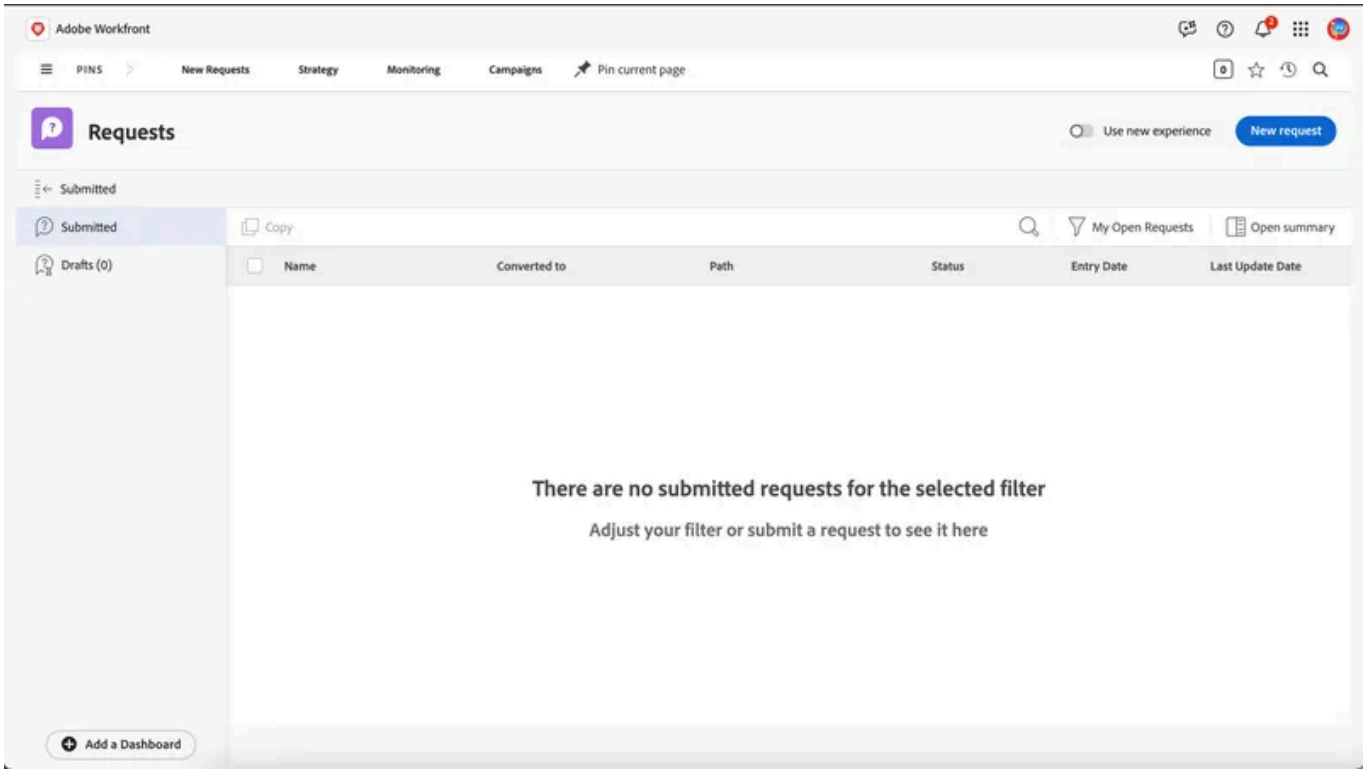
Submitting a request

Click on the **burger menu (three lines)** to see the workfront menu.

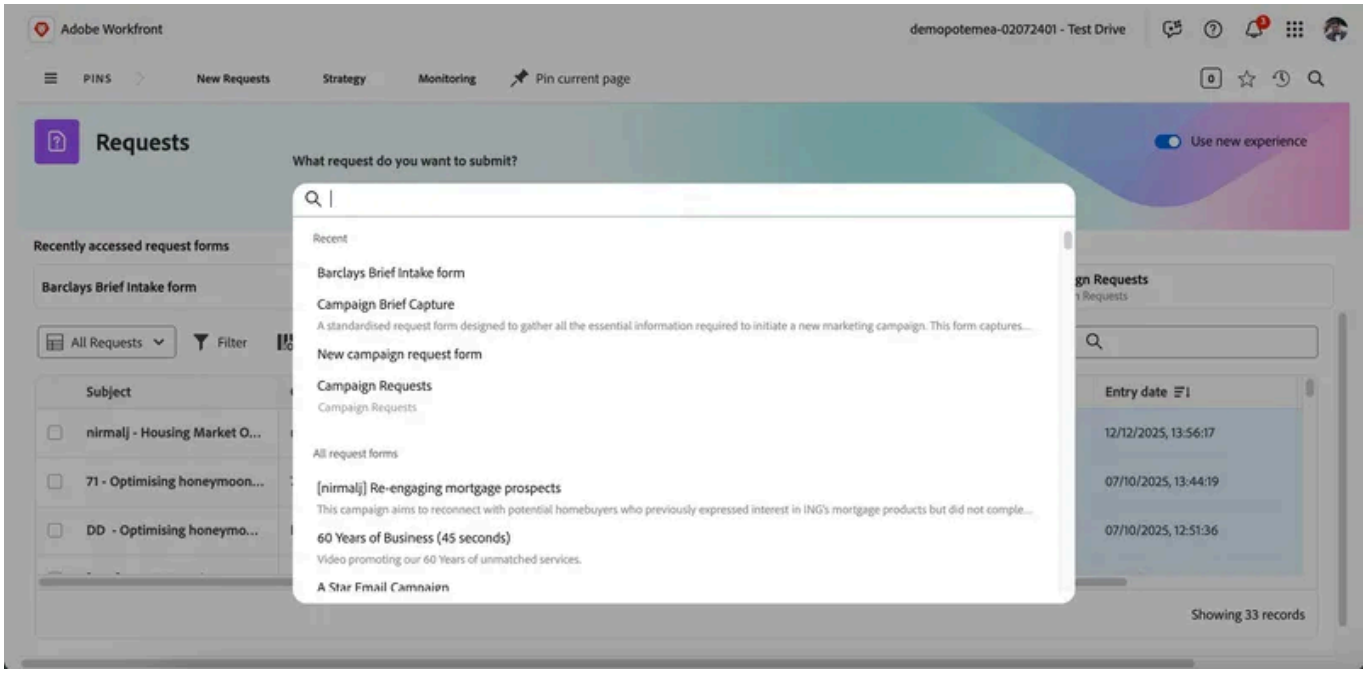


Click on **Requests** to open the Requests overview page. Requests is the central place where we capture all types of requests for the organisation.

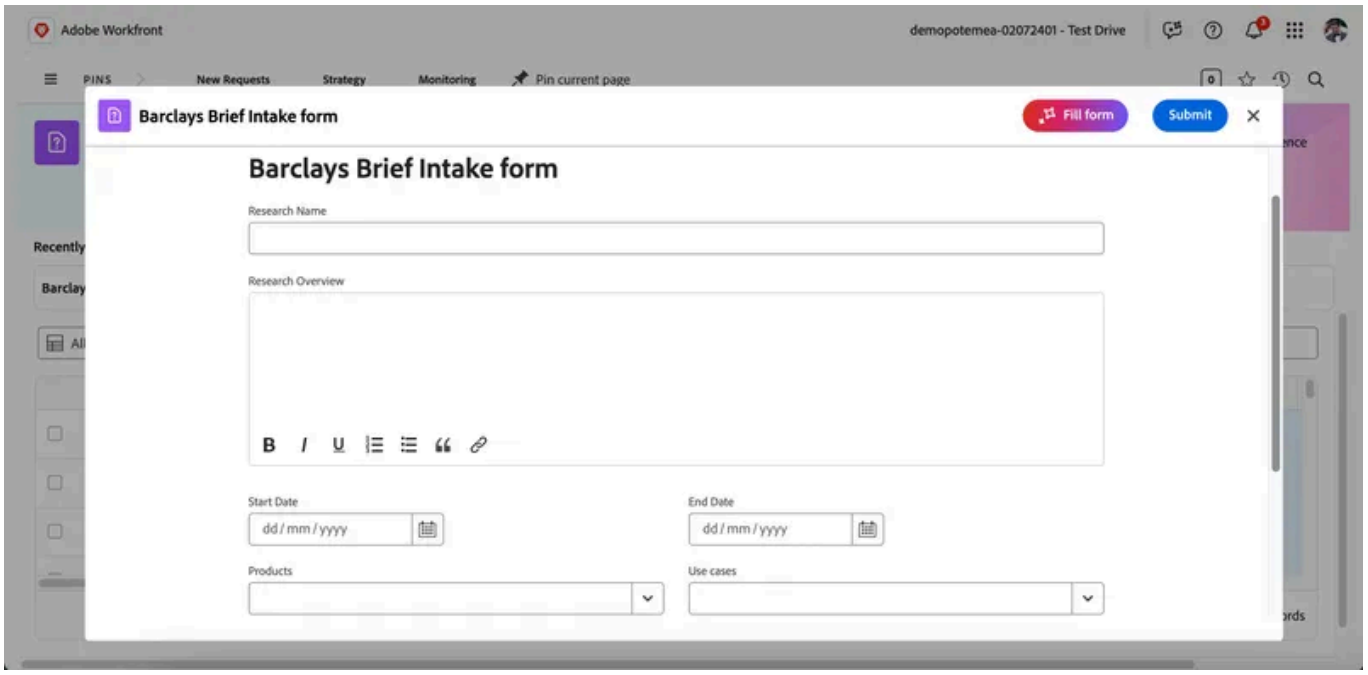
In case you see the below screen, click on the toggle button to **Use new experience.**



Different request queues can be created and managed to ensure processing various types of requests in an organisation. In our case, we want to create a request for a new campaign. To do that, click on the search bar and select **Barclays Brief Intake form**.



This will open up a form to enter the brief details.



Enter the below research details

Research Name : `[initials] - Housing Market Outlook 2026` Use your name prefix along with the research name **eg.** `{{CUSTOMER_NAME}} - Housing Market Outlook 2026`

Research Overview : `This research explores the projected housing market outlook for 2026 in both the UK and US, providing a comparative view of expected performance and examining how global economic conditions are shaping each market.`

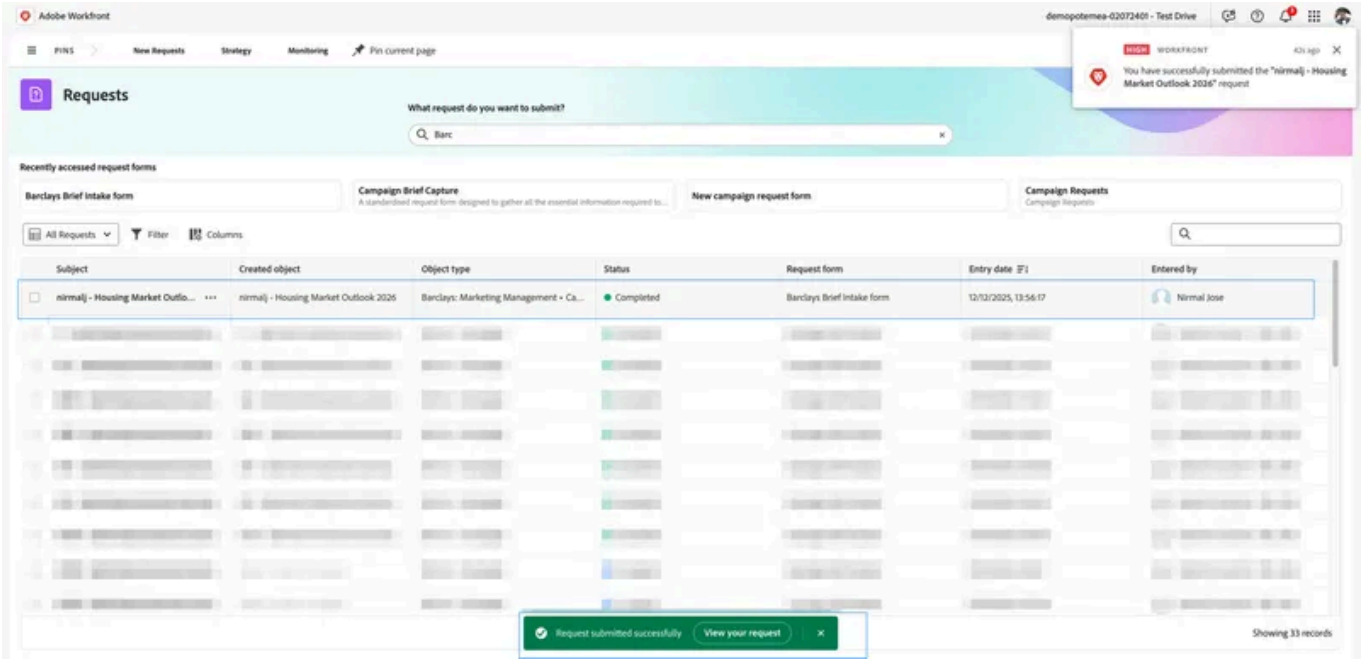
Start Date : Select todays date i.e. `17/12/2025`

End Date : Select a date in the January as the end date i.e. `01/31/2026`

Use Cases : Select `Data-driven lending`

You can leave the other fields unfilled. Click on **Submit** to submit the campaign brief. There are various other ways to submit a brief, **read documentation for details**

Once successfully submitted, you will receive a toast message as `Request submitted successfully.`



We can create custom request forms to capture all kinds of information needed for various types of campaigns and projects. We can also create routing rules or approval processes for requests based on request types allowing different areas in organisation to manage its own request queues.

> You have now successfully submitted a campaign brief in workfront and created a campaign object in workfront planning.

2.1.2. Campaign overview and approval

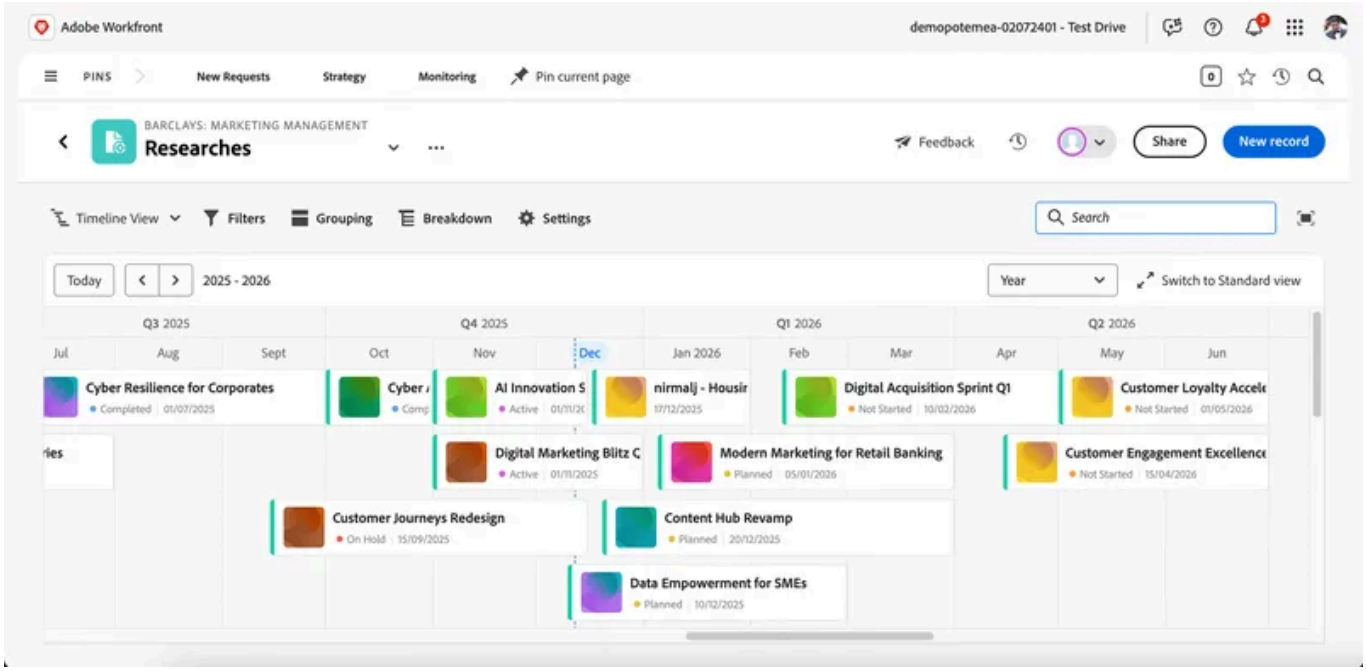
Introduction

Once the campaign creation request is submitted and approved, it will go in to the full list of campaign. If we have submitted a different type of request, it will go into their own queues for futher processing.

In workfront, we have a module called workfront planning which helps to do an overview of all the campaigns.

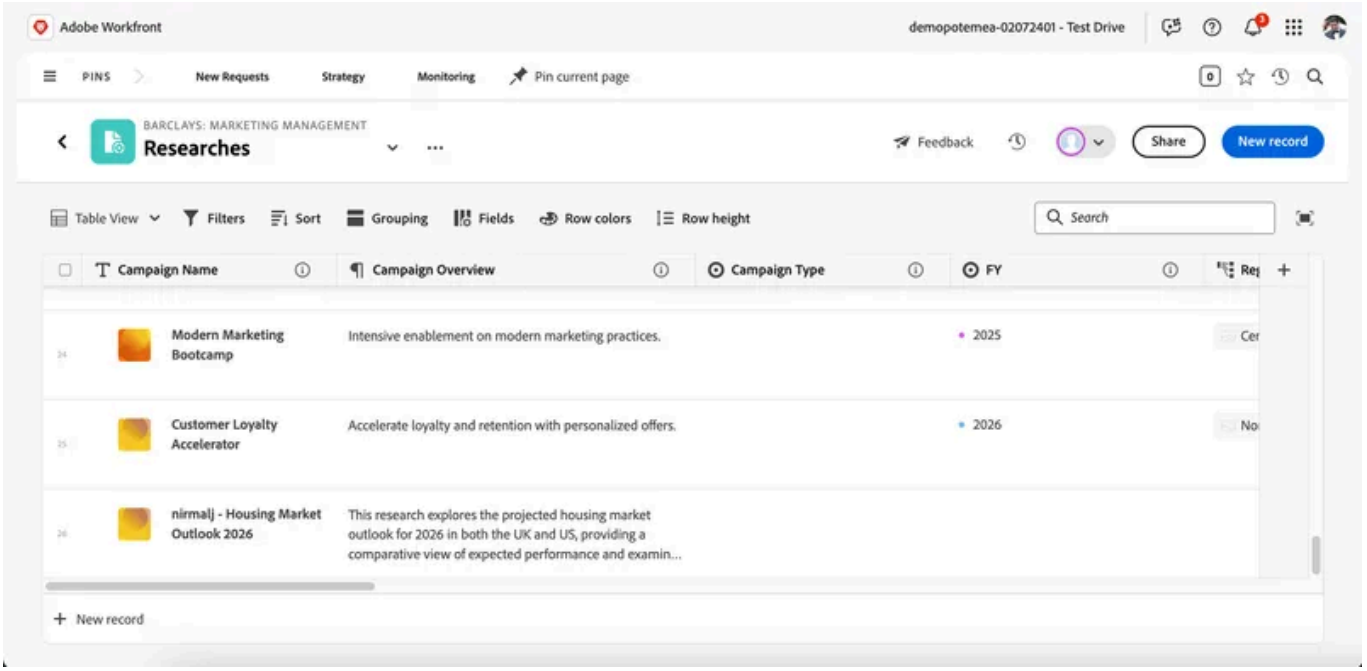
Planning view

Open **Workfront Planning Campaign overview**

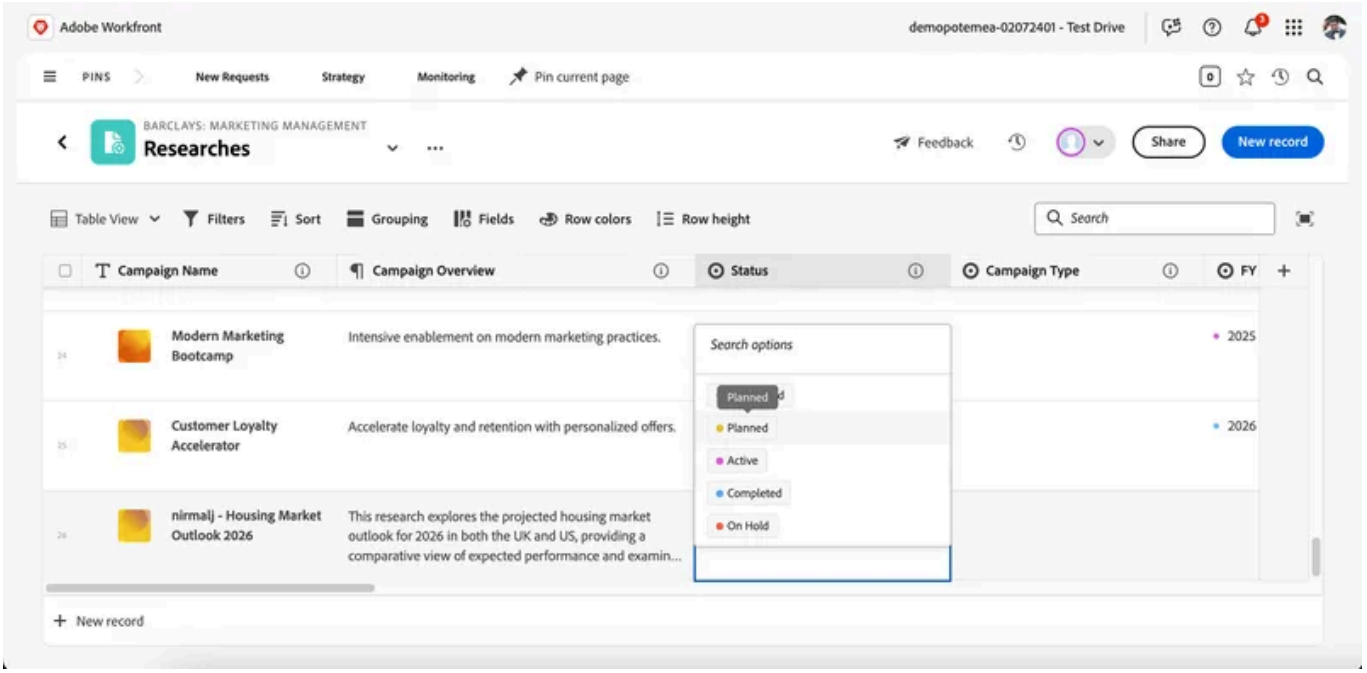


Campaign view gives you the full view of all the campaigns going on in the organisation. The view is fully customisable to suit relevant departments and we can create various connections to various taxonomies and record types.

You can switch to **Table view** and see your approved campaign object at the bottom.



Click on the Empty Status column and **select** the project as **Planned.** You can also click on the campaign name to open the object and see/add more details.



You have now successfully reviewed athe campaign planning calendar for checking the timeline conflicts of the campaign and added to the planned campaigns.

2.1.3. Creating a project

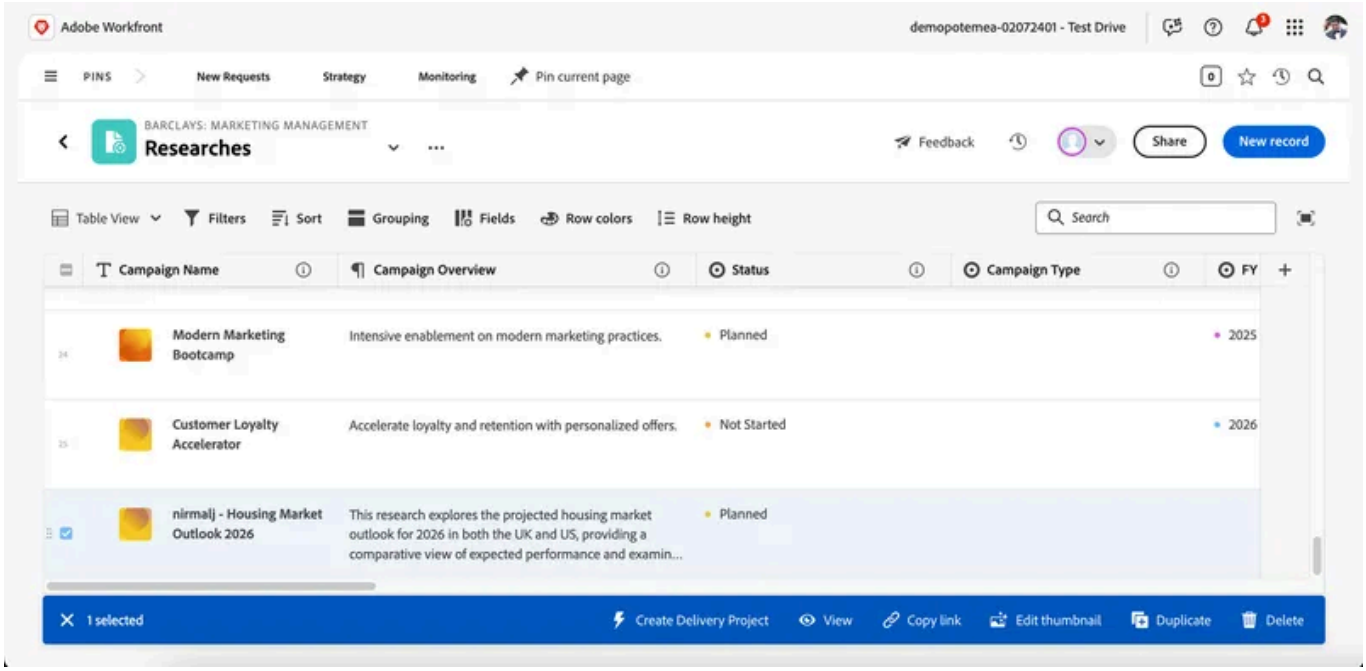
Introduction

The marketer has analysed the data and identified the campaign requirements, created the brief and submitted the request. The campaign manager has validated the overall campaign timelines and budget availability and has given a go ahead. Now its time to start actioning on the request.

Creation of project

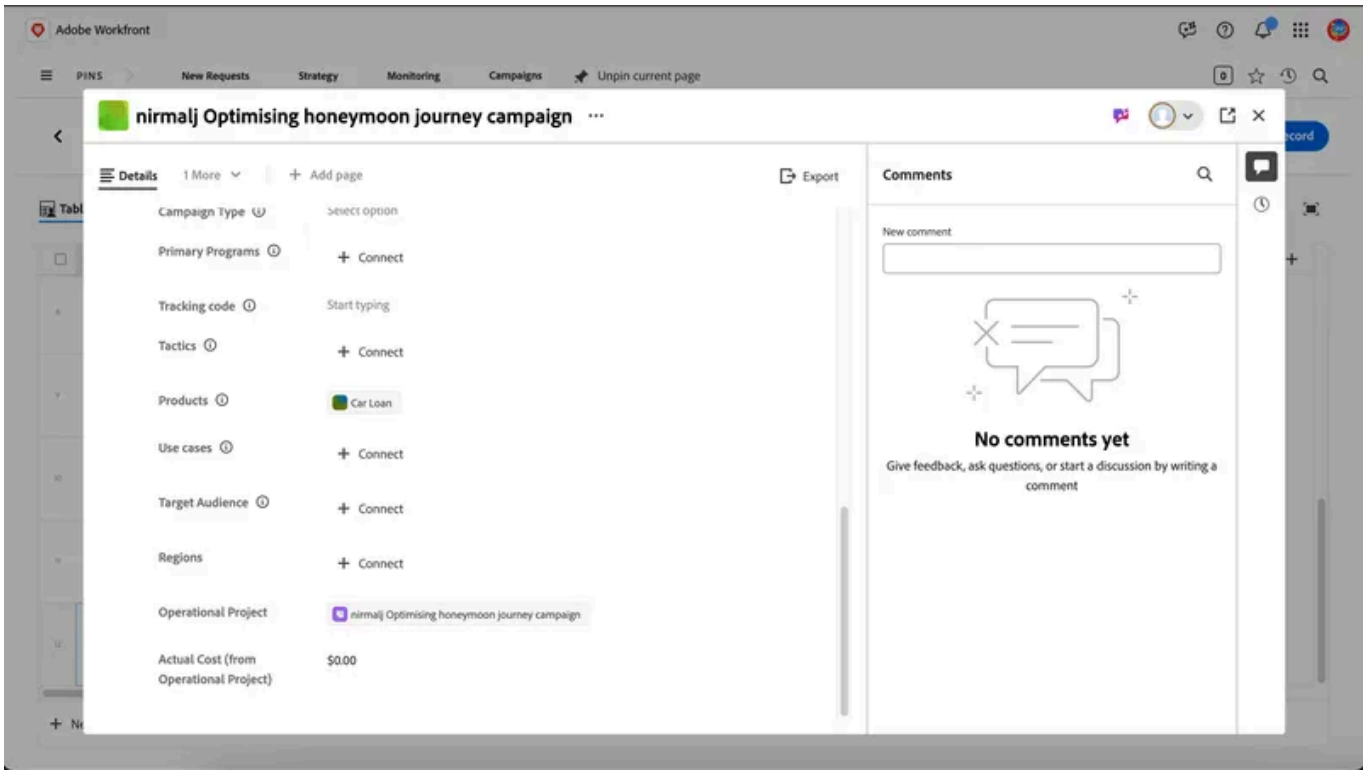
Select the campaign object you created in the Table view `{{CUSTOMER_NAME}} - Housing Market Outlook 2026`

This will open a ribbon menu where in you can click on **Create Delivery Project**

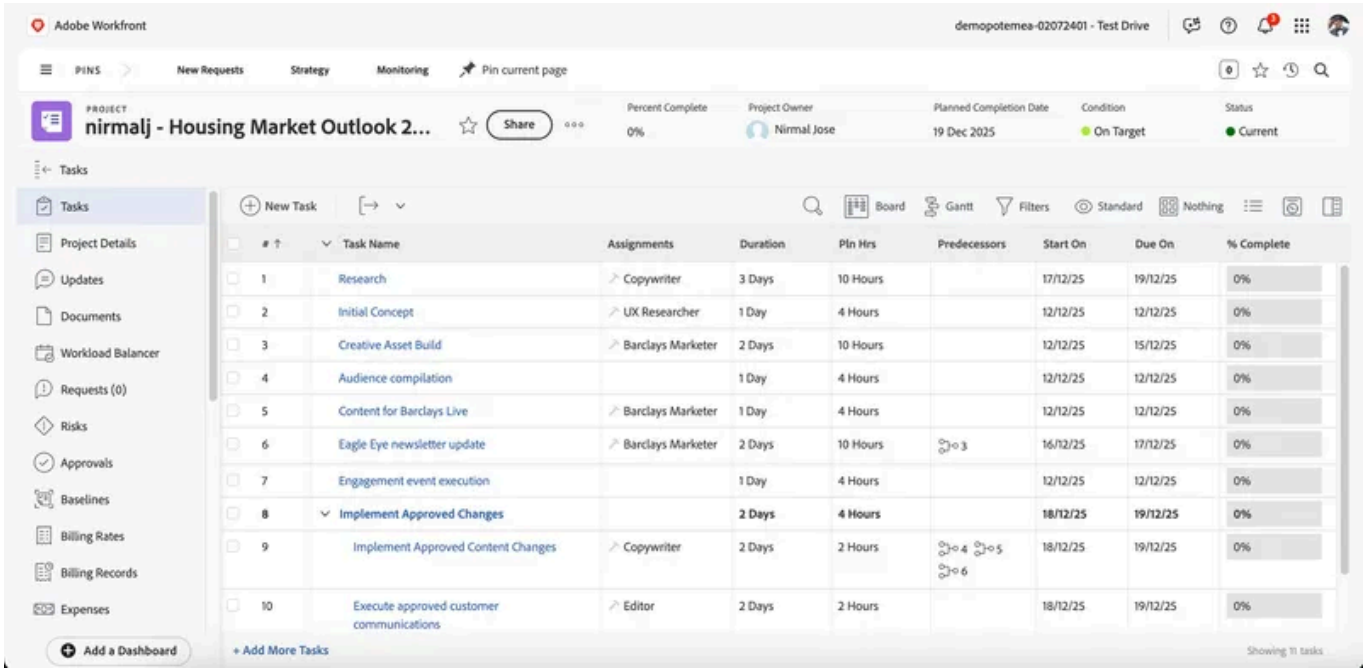


This converts the request to a project and creates actionable tasks based on the template. You will see a success pop up upon conversion.
Project creation may take a couple of minutes depend on the template we use. ***Please refresh the window*** *once you see the success toast message.*

Click on the **Research Name** to open the campaign object and scoll down to see **Delivery project.**

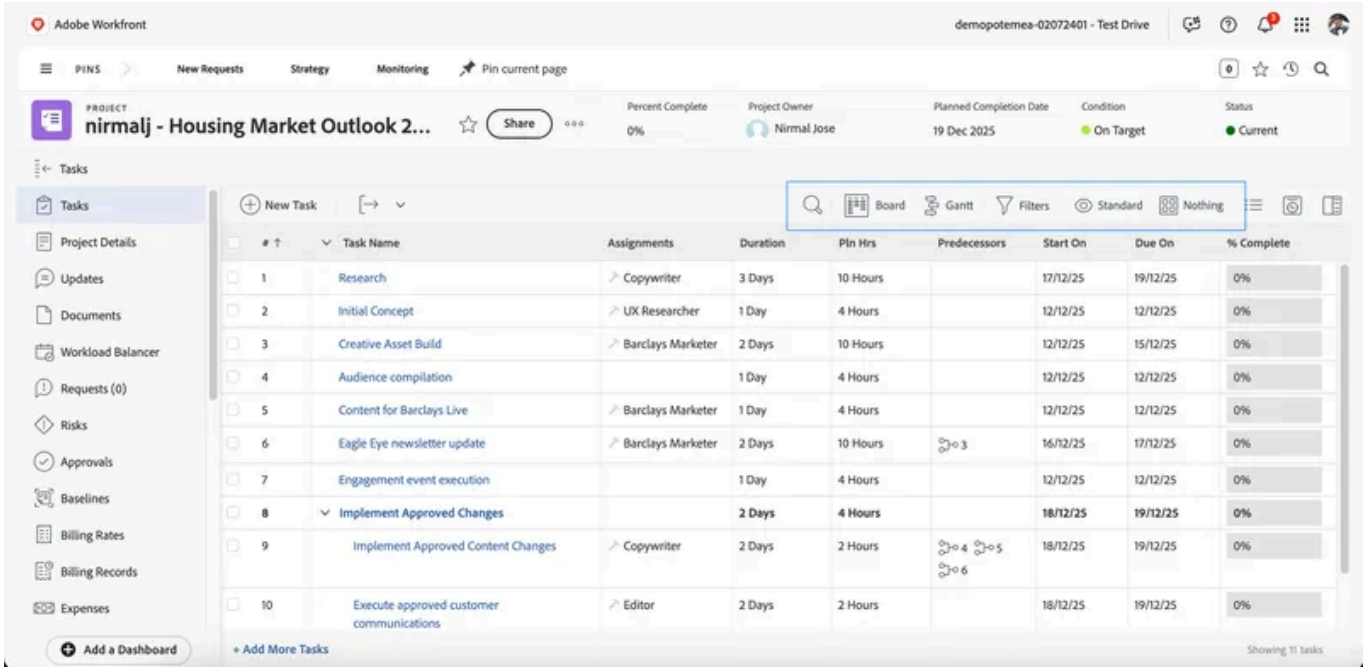


Click on the operational project object with the same name as research name i.e. `{{CUSTOMER_NAME}} - Housing Market Outlook 2026` to go into the project. This opens a new tab showing all the pre-defined tasks and assignees based on the project template.



We can view the tasks in different views based on the team requirements and needs.

1. Clicking on *Gantt* shows the timeline relationships between tasks and associations
2. Clicking on *Board* changes to a kanban delivery board for the tasks in the project.
3. You can select different views and grouping based on project attributes as well.



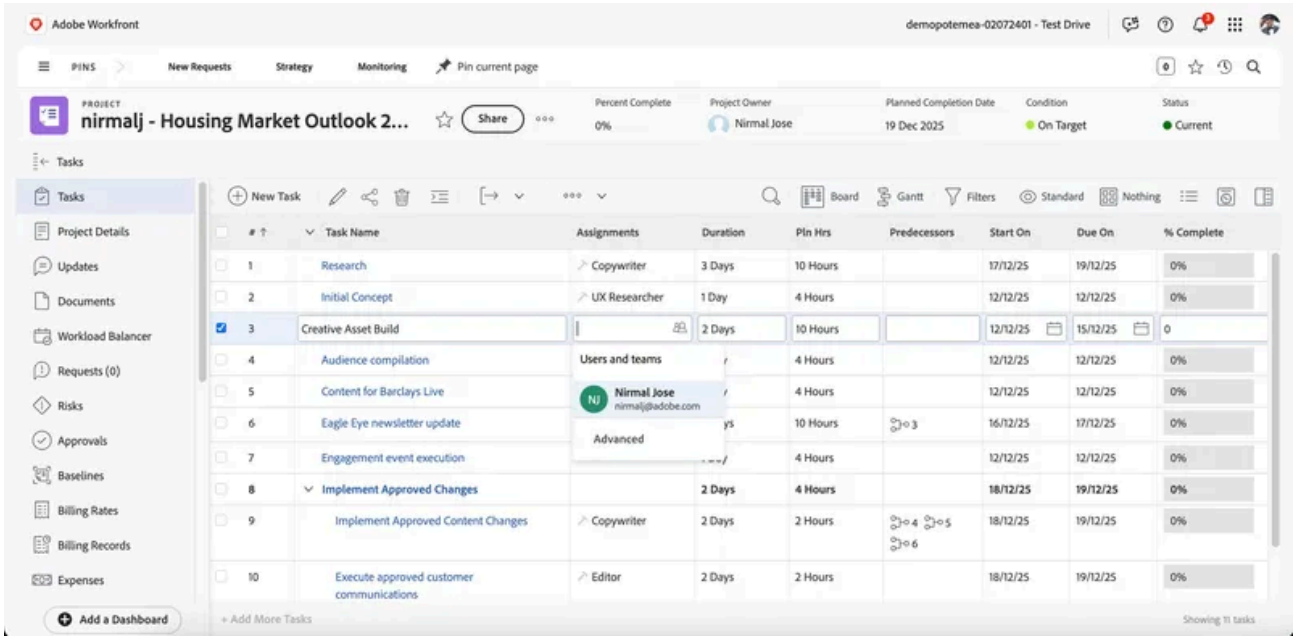
Come back to **List view** and **standard view** for the next task.

Assigning a task

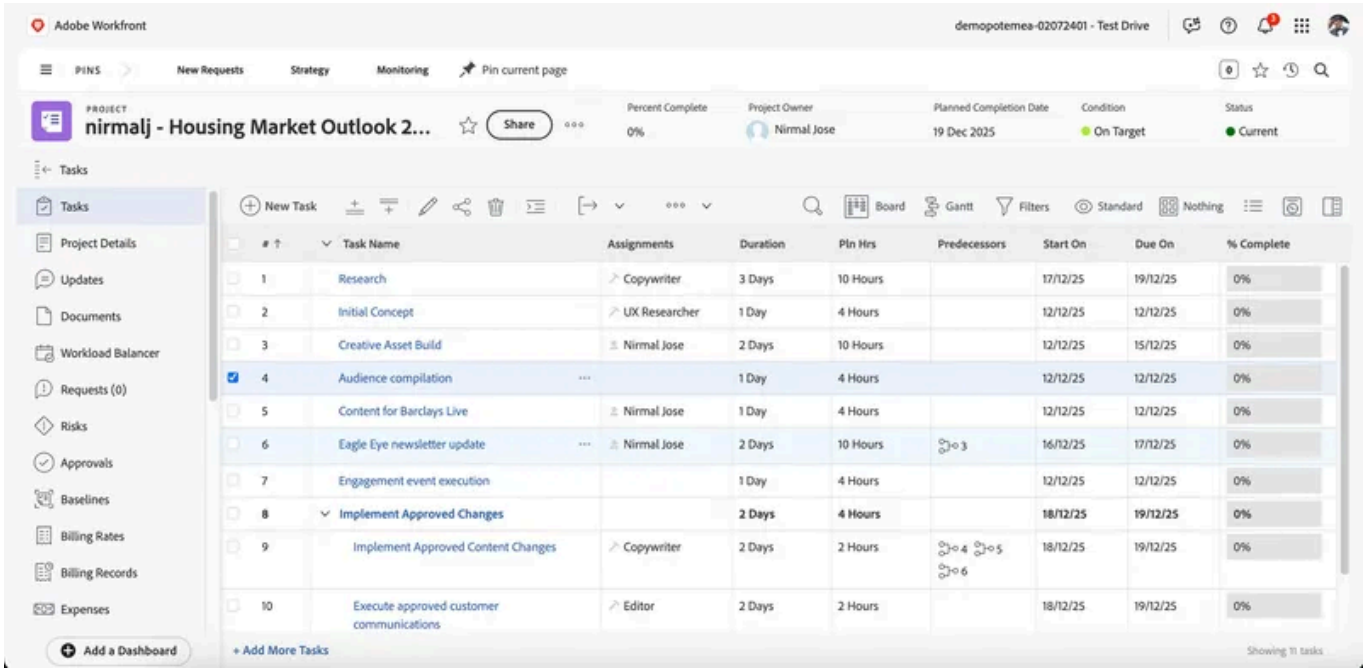
We can define the default assignments for the tasks of the project. This is by default assigned to *Barclays Marketer team* which includes everyone attending the labs today.

We are now going to assign two tasks to yourselves.

1. Click in the assignments cell for the **Creative Asset Build** task to make it editable.
2. Click on **(x)** on Barclays Marketer group to remove the teams assignment
3. Search for your assigned user name and select it to assign the task to yourself.



4. Do the same for the **Content for Barclays Live & Eagle Eye newsletter update** tasks and assign them to yourselves.



Workload balancer for team view

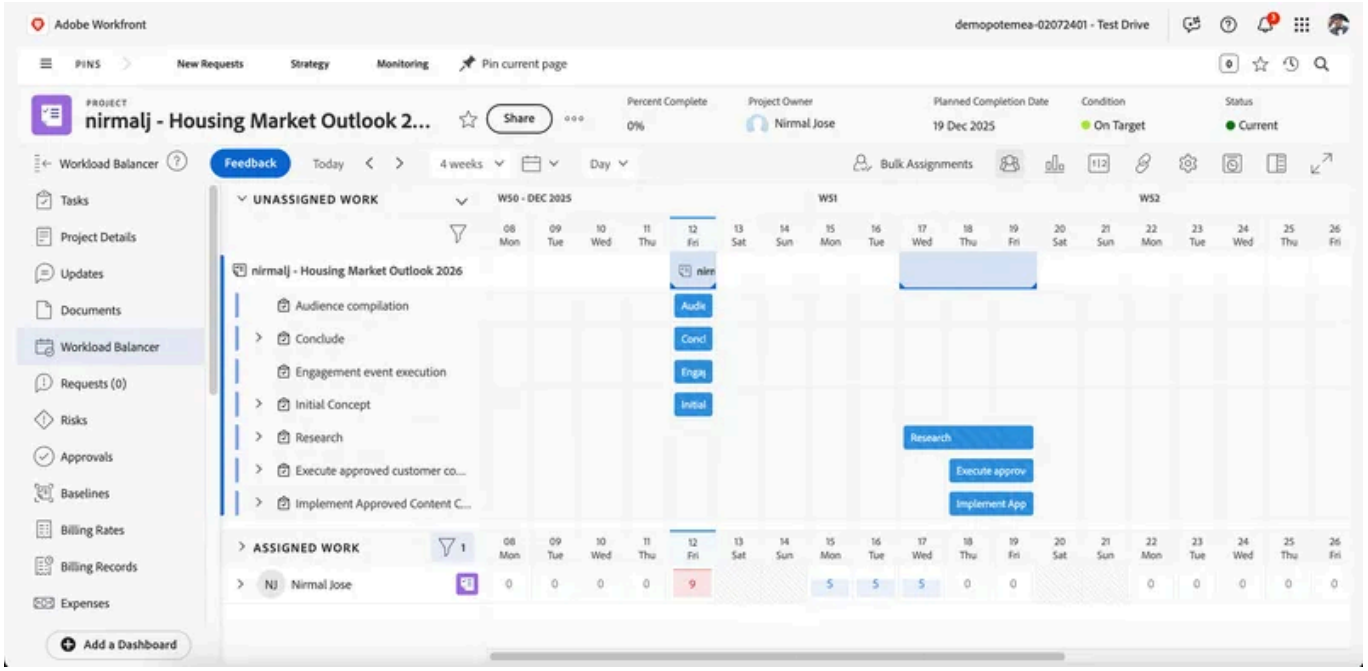
The **Workload Balancer** in Adobe Workfront is a powerful tool designed to help project managers and team leads efficiently manage and distribute work across their teams. It provides a real-time, visual overview of team members' workload, making it easy to identify over- or under-utilization and adjust assignments accordingly.

With the Workload Balancer, you can:

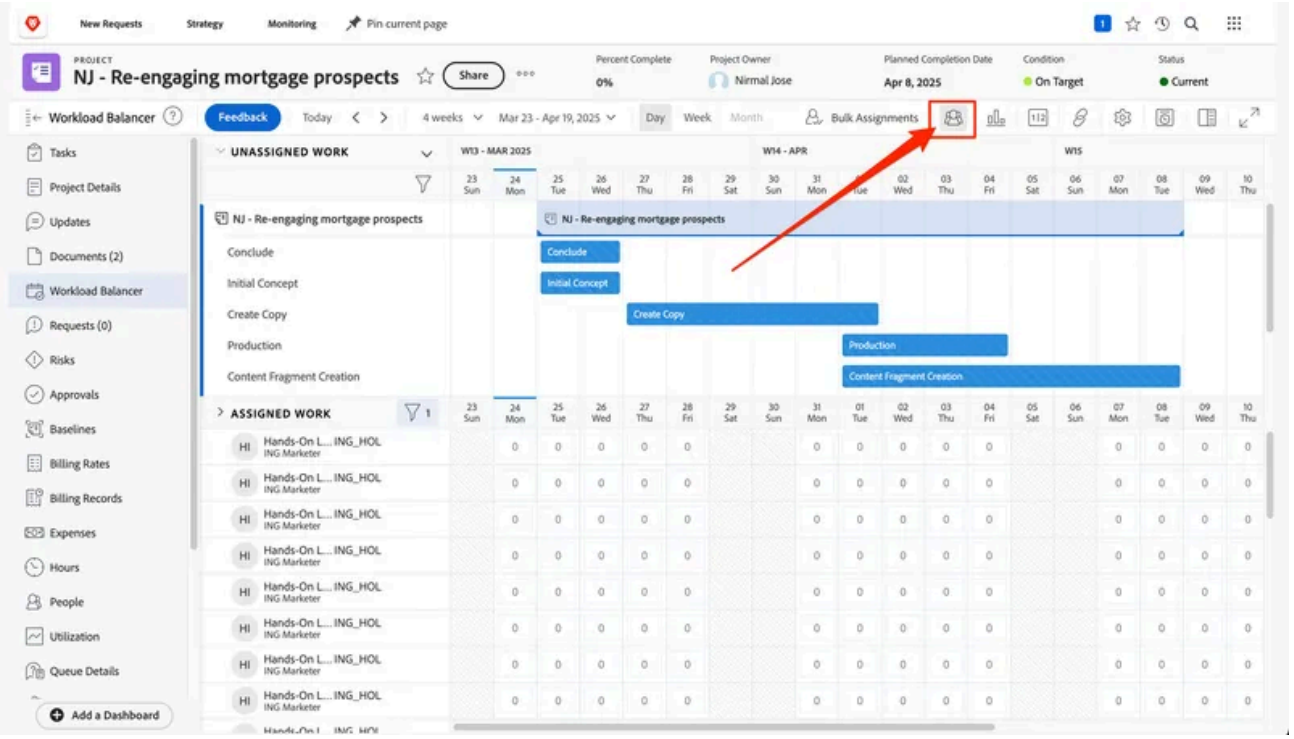
- **View workload distribution** – See how work is allocated across team members and adjust to prevent burnout or inefficiencies.
- **Reassign tasks easily** – Drag and drop tasks to balance workloads in real time.
- **Set capacity limits** – Define individual and team capacity to ensure workloads stay manageable.
- **Improve efficiency** – Optimize resource allocation to meet deadlines without overloading team members.

By using the Workload Balancer, you can ensure that work is distributed fairly and efficiently, helping teams stay productive and focused.

1. Click on **Workfront Balancer** from the left pane menu.



1. Click on **show all users** icon to see the workload of your team. This view is filtered to just to see people attending the lab today.



You have now successfully created a campaign project in workfront and have assigned tasks to the relevant team.

2.2. Creation & Production

Introduction

Once the plan is in place, content creation and asset development begin. This phase includes Content Creation, Review & Approval, and Asset Management, ensuring high-quality, on-brand marketing materials.



Learning Objectives

- Learn how to create and manage digital assets effectively.
- Understand the review and approval process for campaign assets.
- Explore how to organize and store content for efficient reuse.

2.2.1. Creation of asset

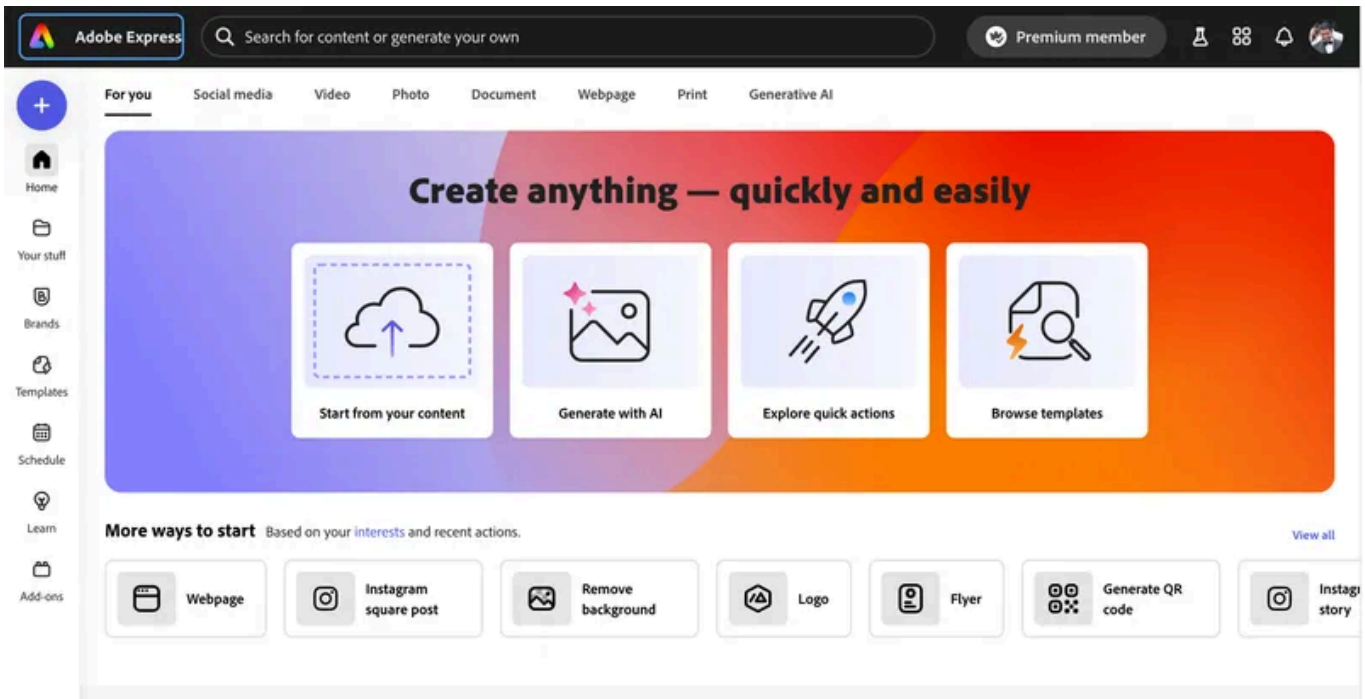
Introduction

We now have the Creative Asset Build task assigned to you and now lets do it. The ask is to create a hero banner for the welcome email in the honeymoon journey.

In the real world, it may be any of our enterprise creative software such as Adobe Photoshop or Adobe illustrator which has a native workfront integration. In these software, creative team will get their tasks from workfront readily available in the tool of their choice.

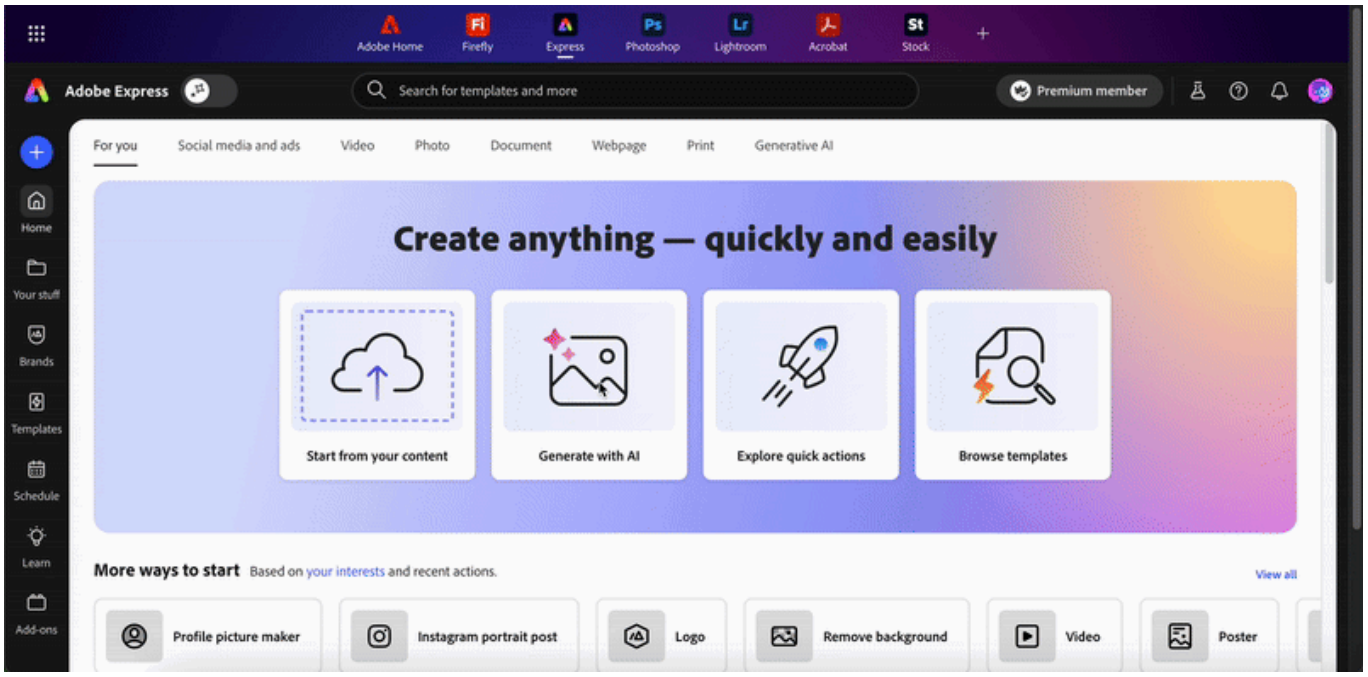
For this exercise, we will be using Adobe Express as our asset creation tool for this lab. Open **Adobe express**

Once logged in, you should land on the Adobe Express Homepage as below.

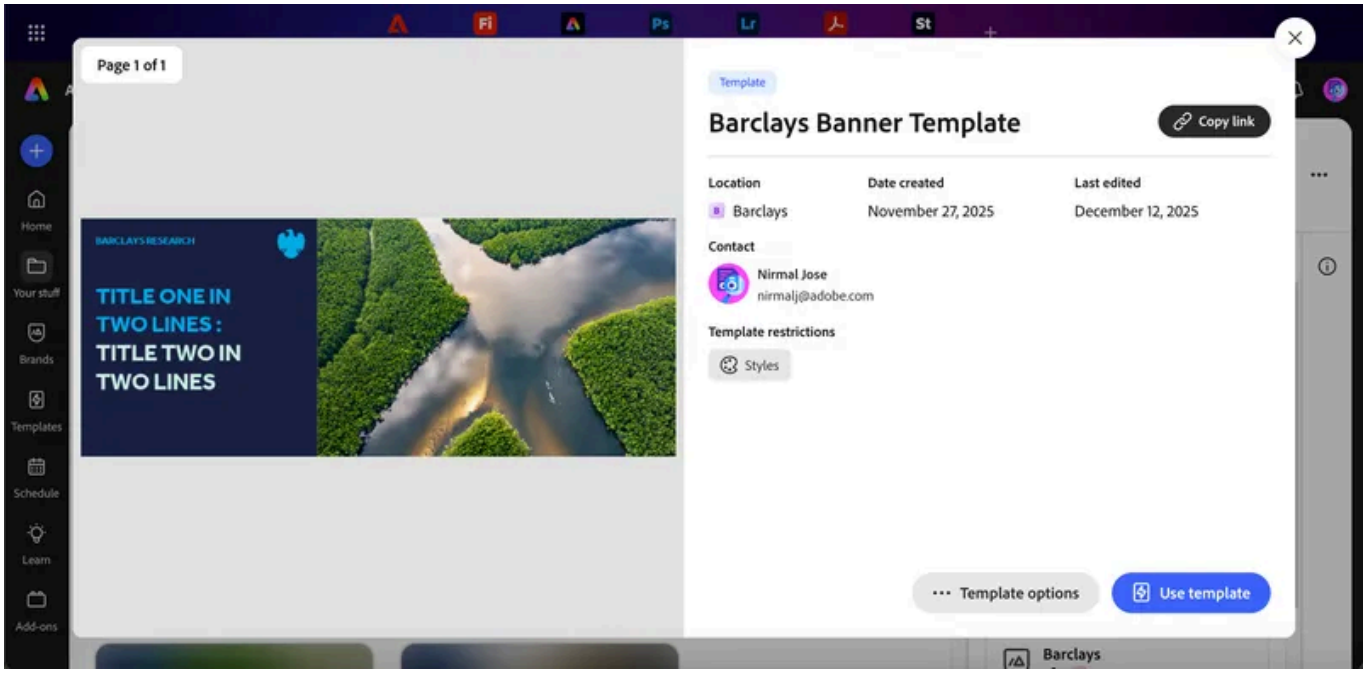


Starting from brand templates

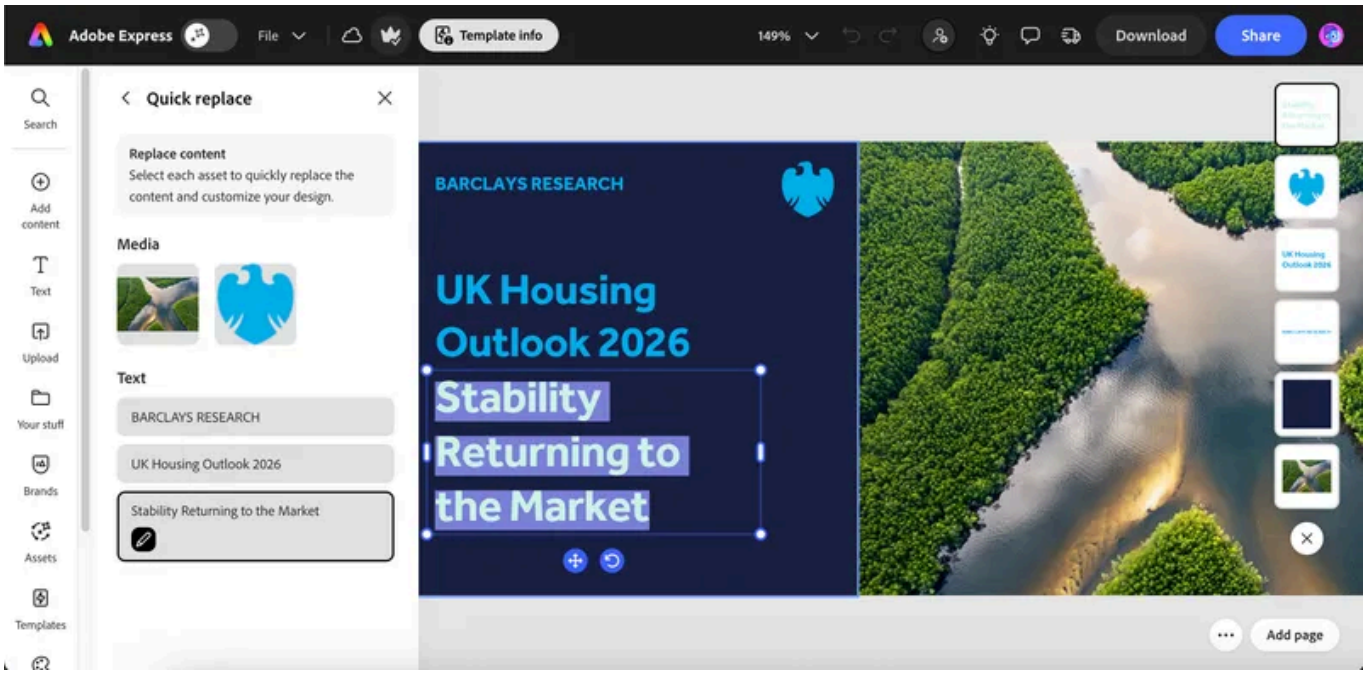
Click on **Your stuff** in the left hand menu and go to **Projects** tab and select **Barclays** project.



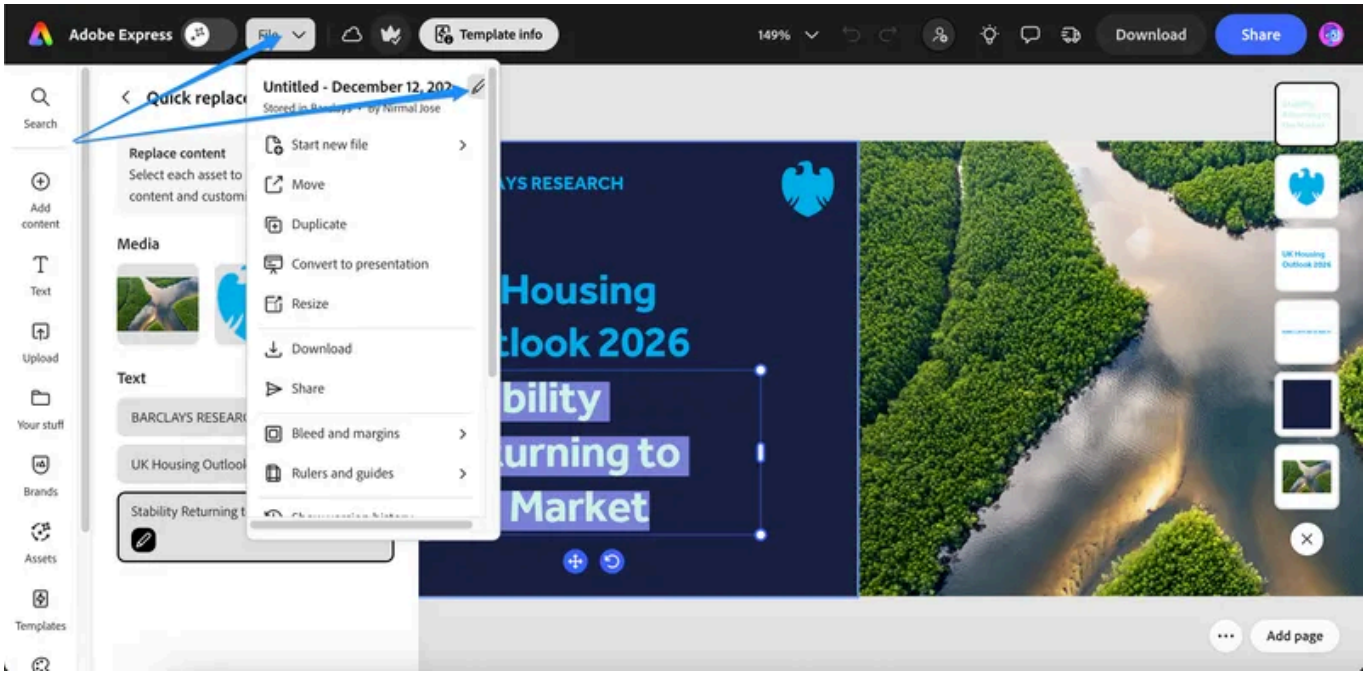
Click on **Barclays Banner Templaa** to start from this template. Templates allows us to quick create brand adhered assets. Click on **Use template** to create a new file using this template.



Click on the **first Text element block** in the Quick replace menu. Update the title as `UK Housing Outlook 2026` .Update second line text as `Stability Returning to the Market`

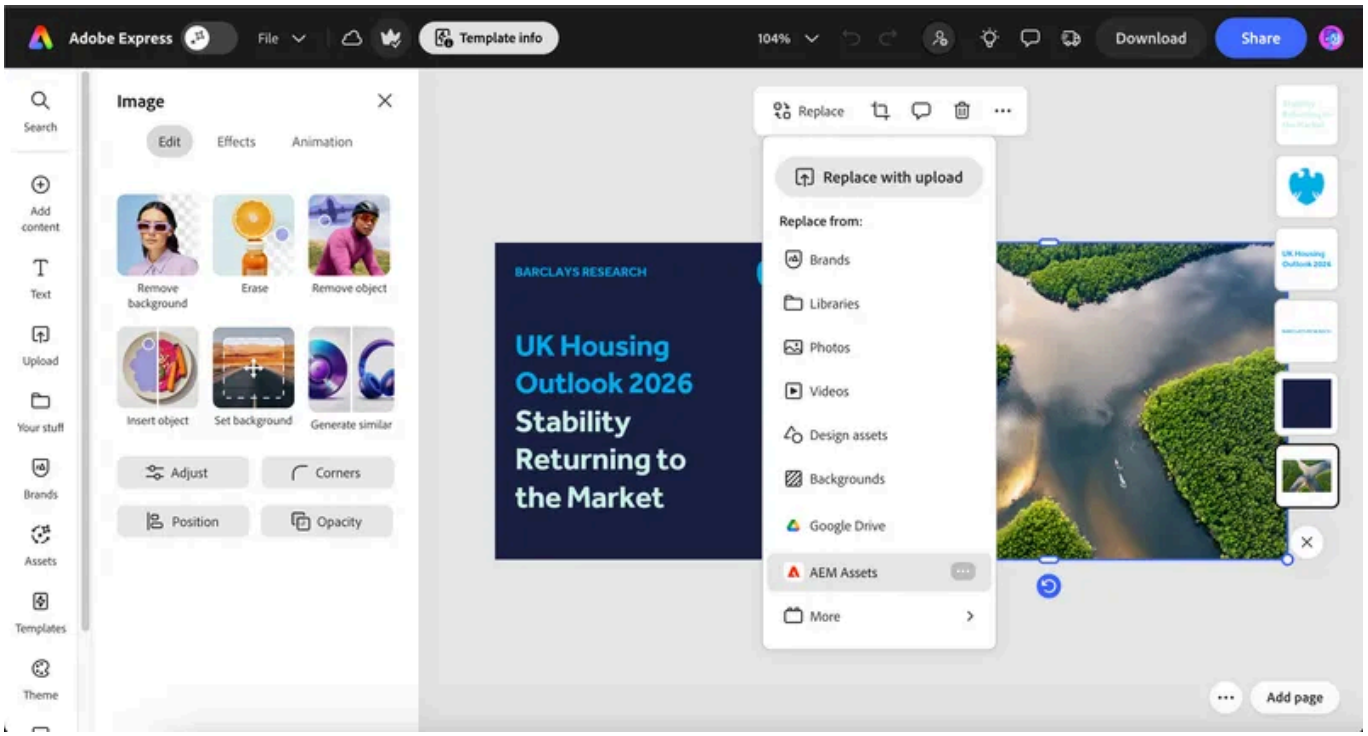


Click on File and Edit icon on the file name. Update the the **Name of the file** and rename it with your name prefix as `{{CUSTOMER_NAME}} - UK Housing Outlook 2026 Banner`

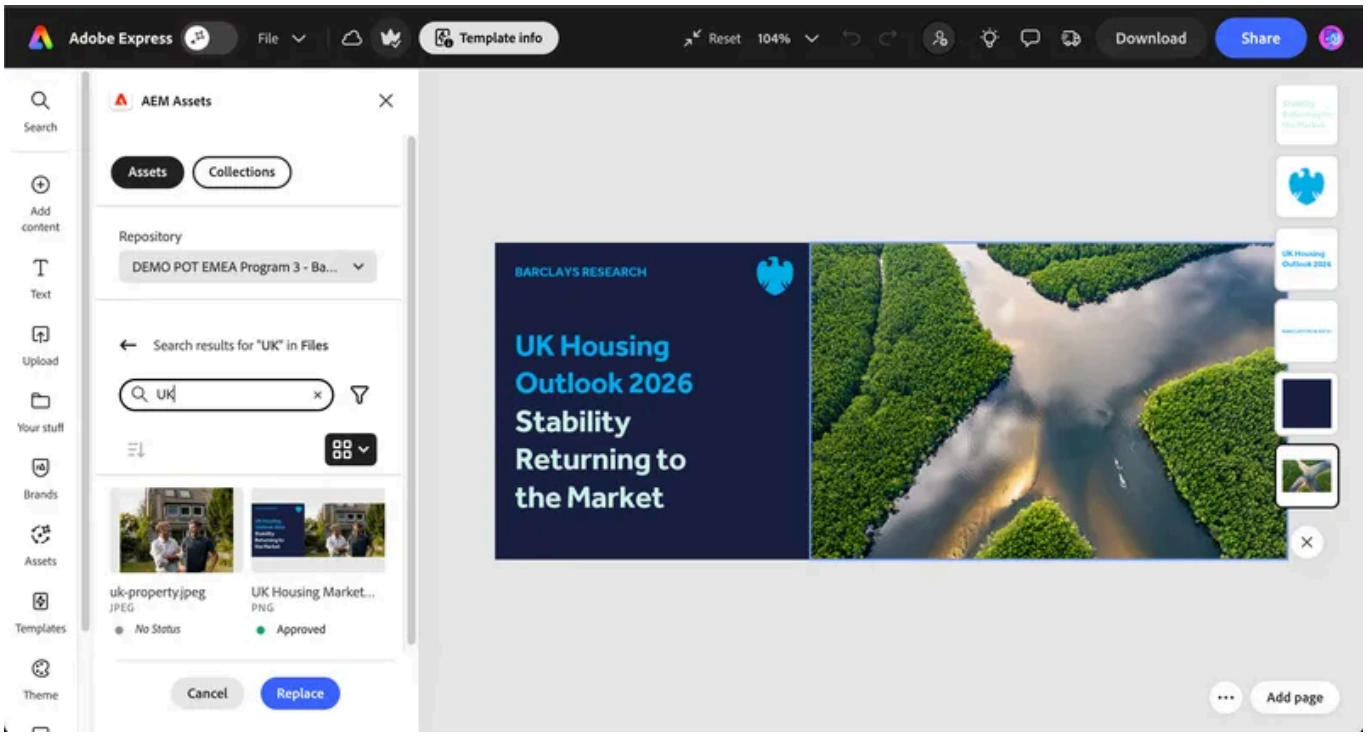


Replace the image with asset from AEM assets

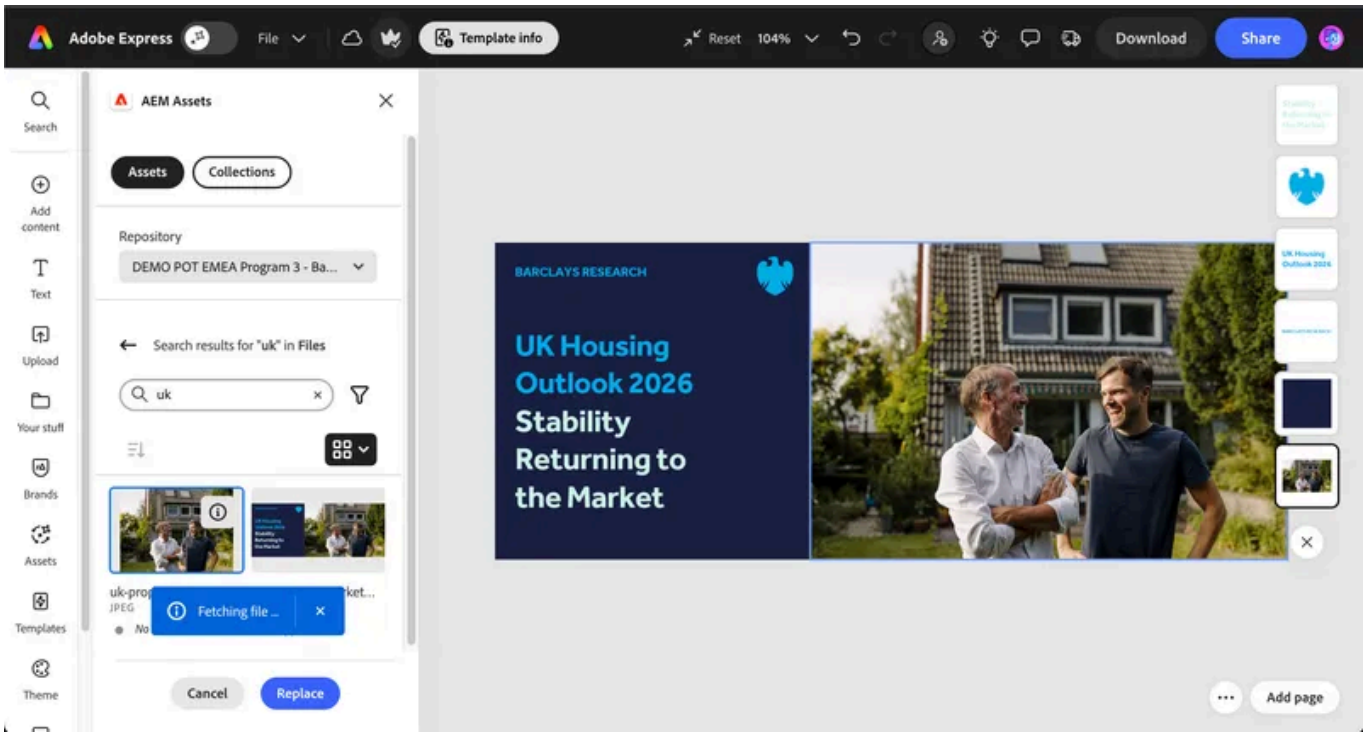
Click on the **image** to show the image menu options. Click on **Replace** button and select **AEM Assets** from the list.



This opens up AEM Assets rail on the left. **Search** for `UK` in the search bar to filter for UK images.

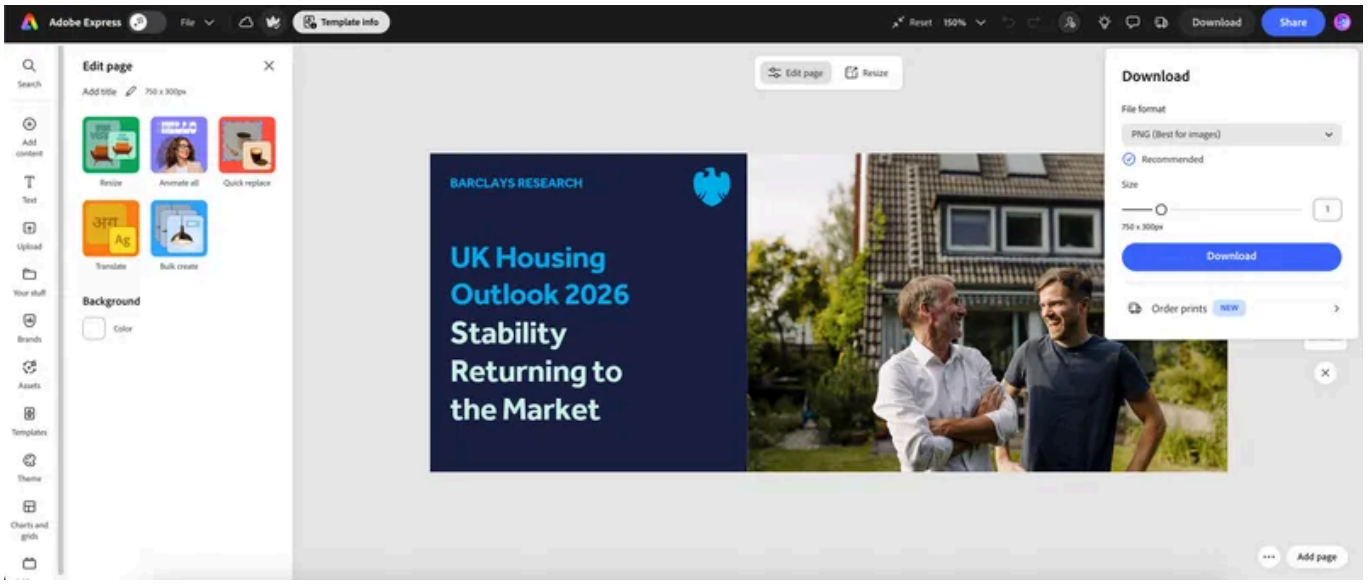


Click on the **uk-property.jpeg** image thumbnail to replace the image in our banner.



Once the banner is ready, to download the image

1. Click on **Download** from the top ribbon menu.
2. Select File format as **PNG.**
3. Click **Download** button to download the image to your local machine storage.



> In a production instance, there is direct integration where you can send the assets directly to workfront for review & approval for Adobe Express. You can read more about it in **documentation**.

You have now successfully created a banner in Adobe express.

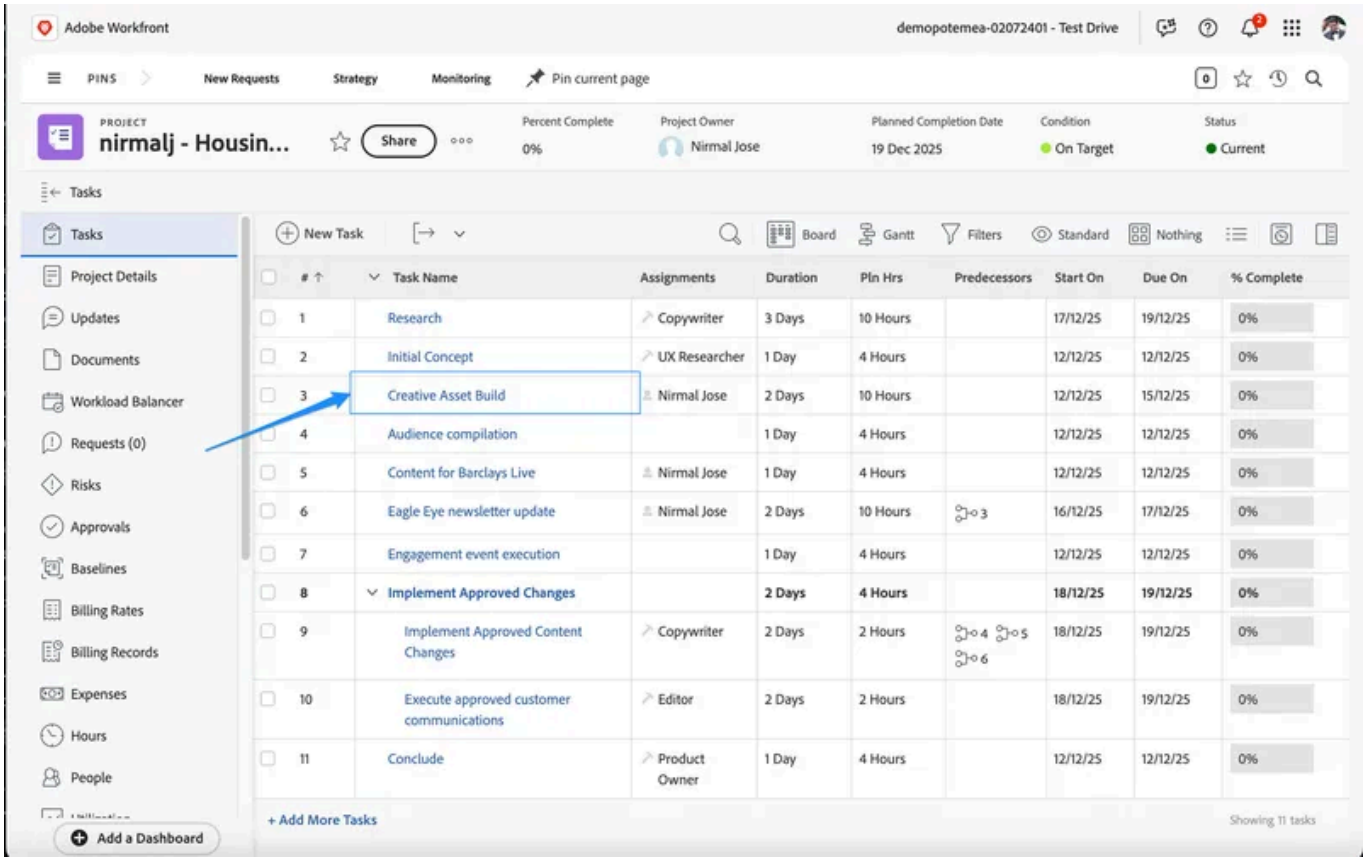
2.2.2. Review & Approval

Introduction

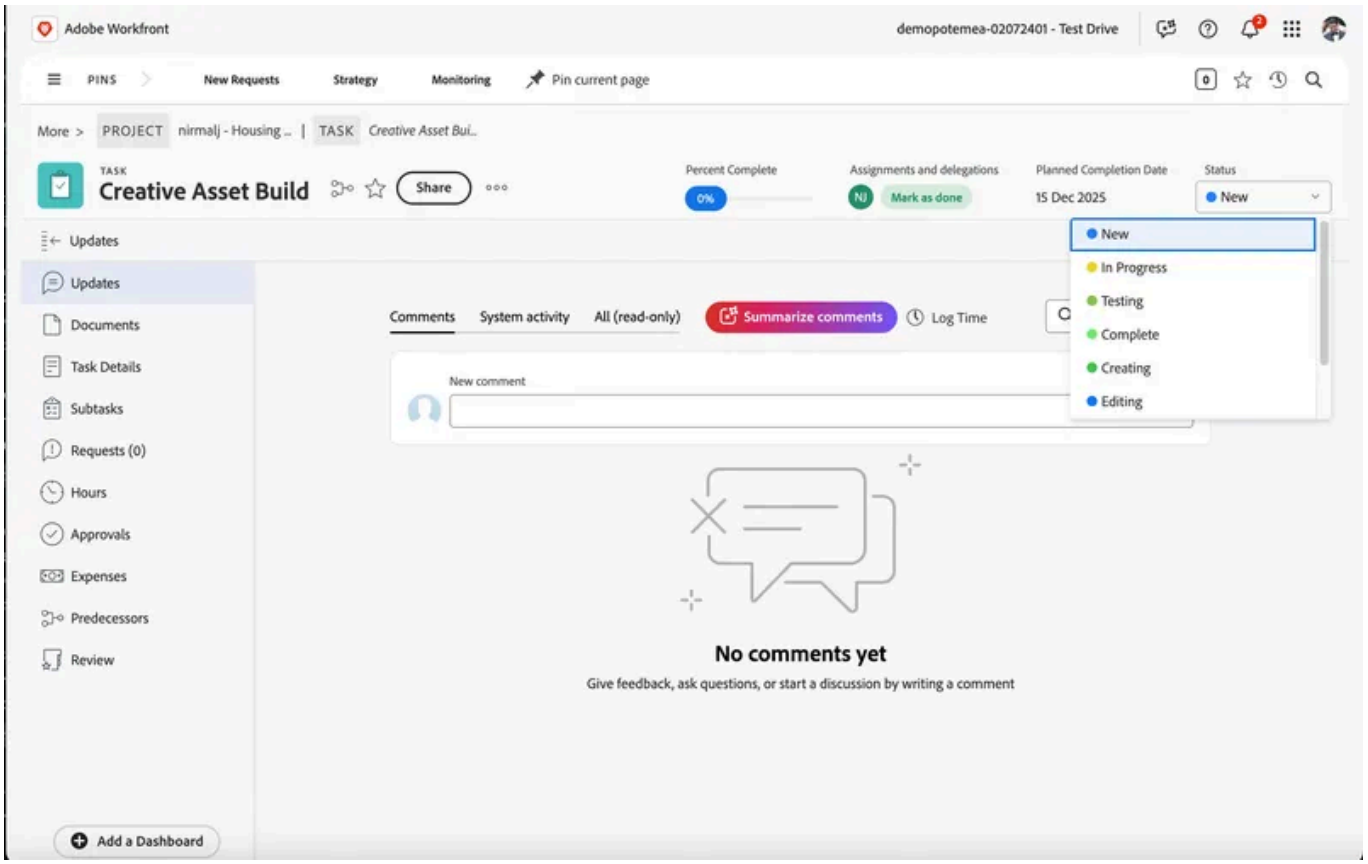
In the original process flow, creative teams will go through content creation, review and approval process via creative tools itself. Since we have skipped the content creation section of the lab, we will be going through the review and approval process using the asset we downloaded from the project.

Requesting a review

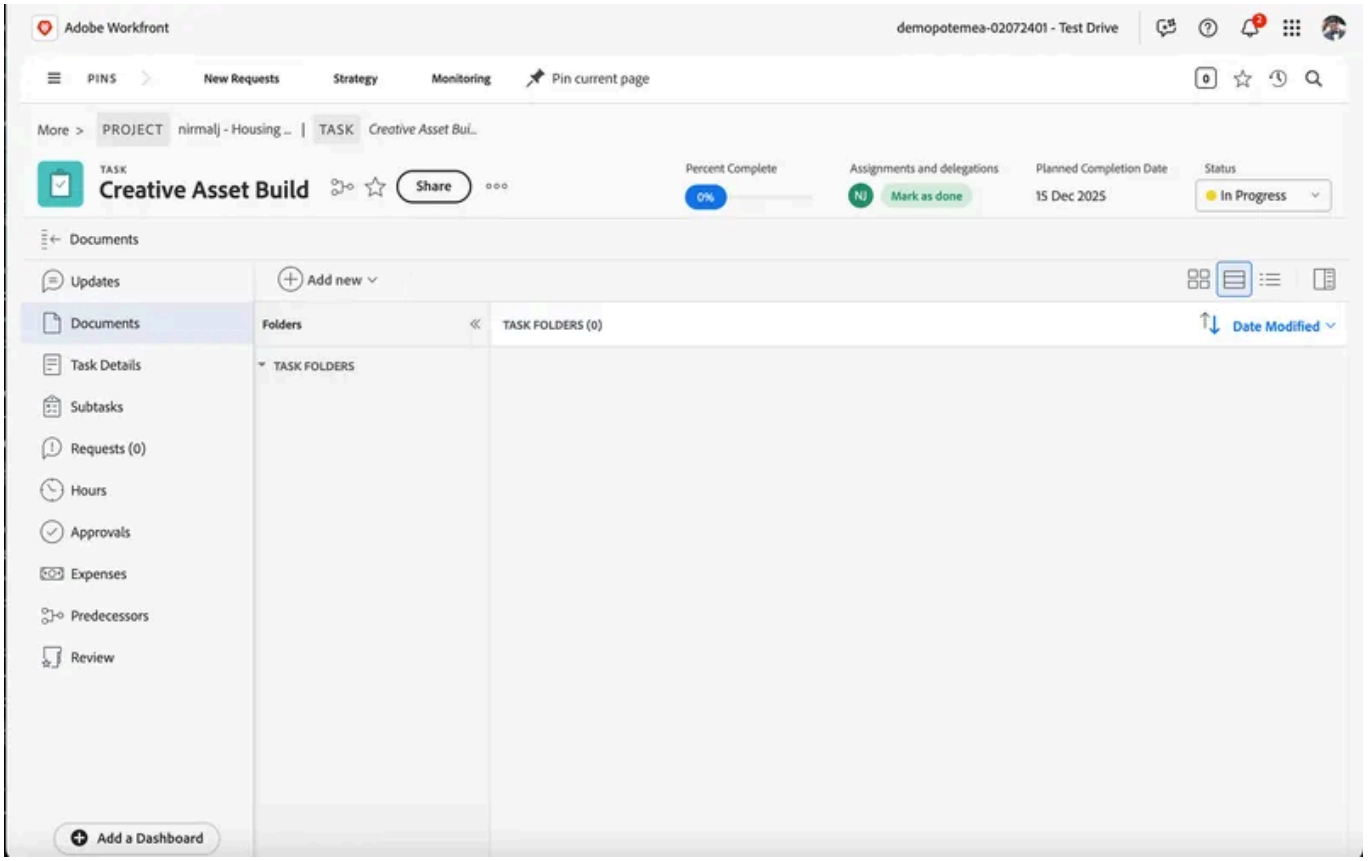
Navigate to **Tasks** and click on the **Creative Asset Build** task.



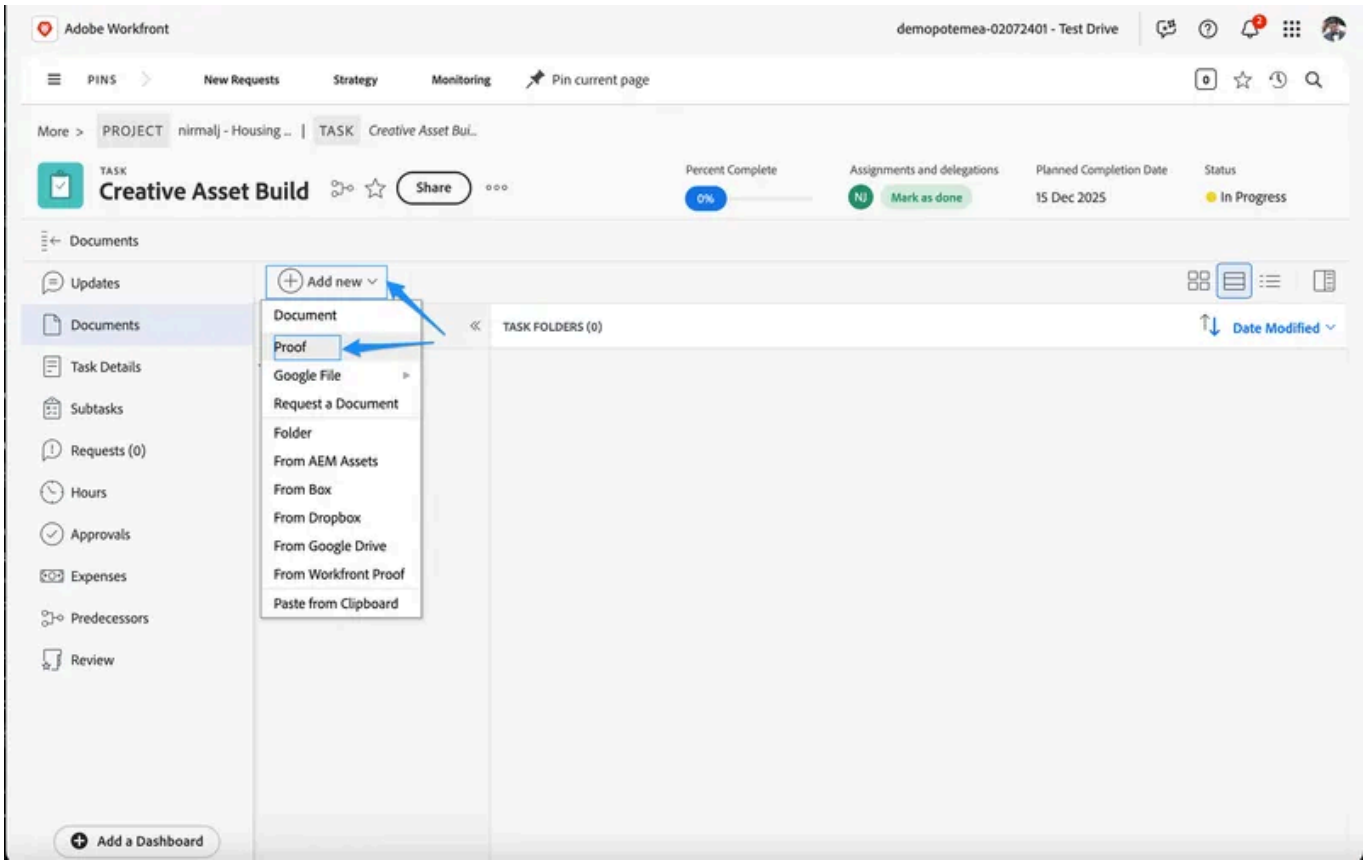
Go into the **Task Details** and mark the **status** of the task to **In Progress**



Click on **Documents** from left side menu.

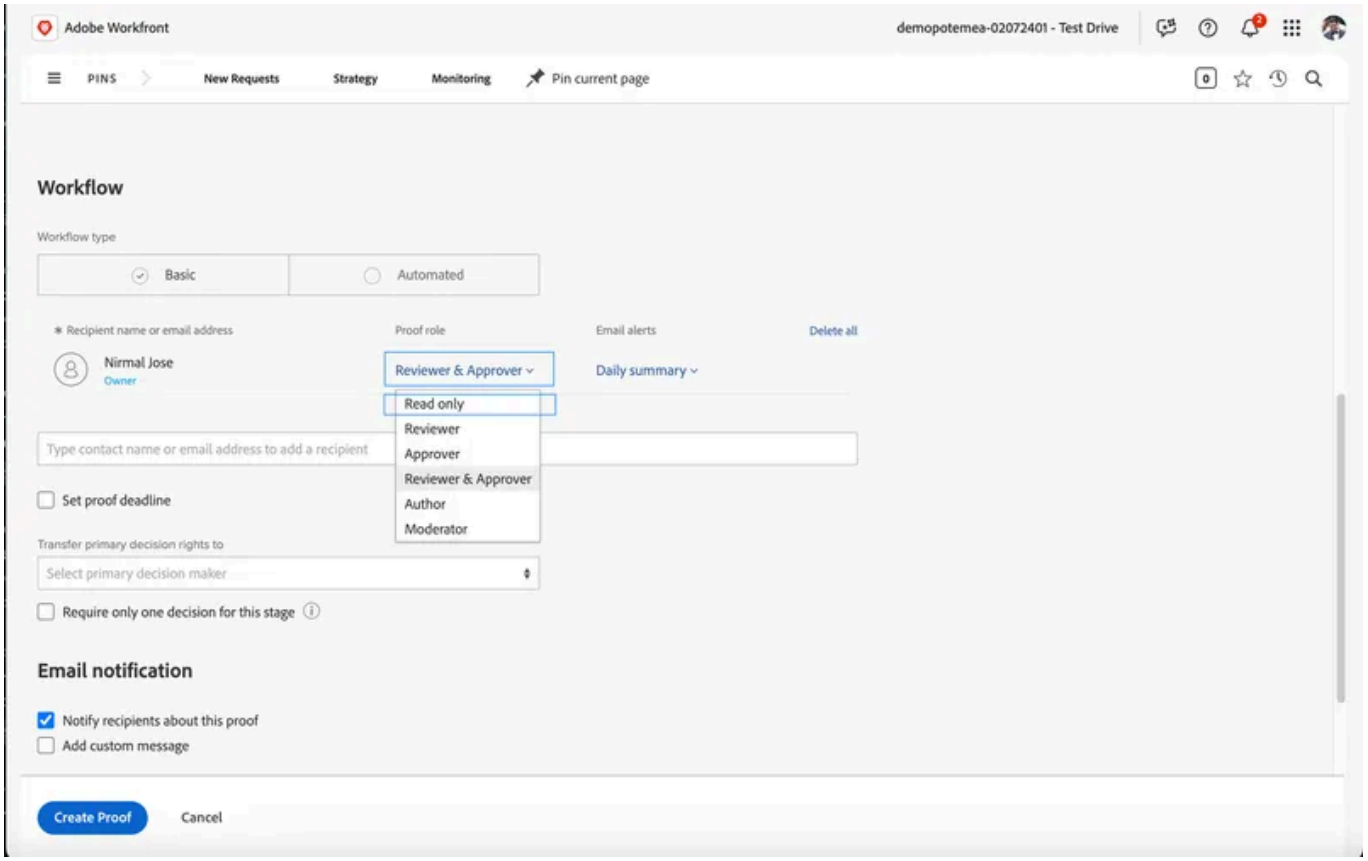


Click on **Add new** and select **Proof.**

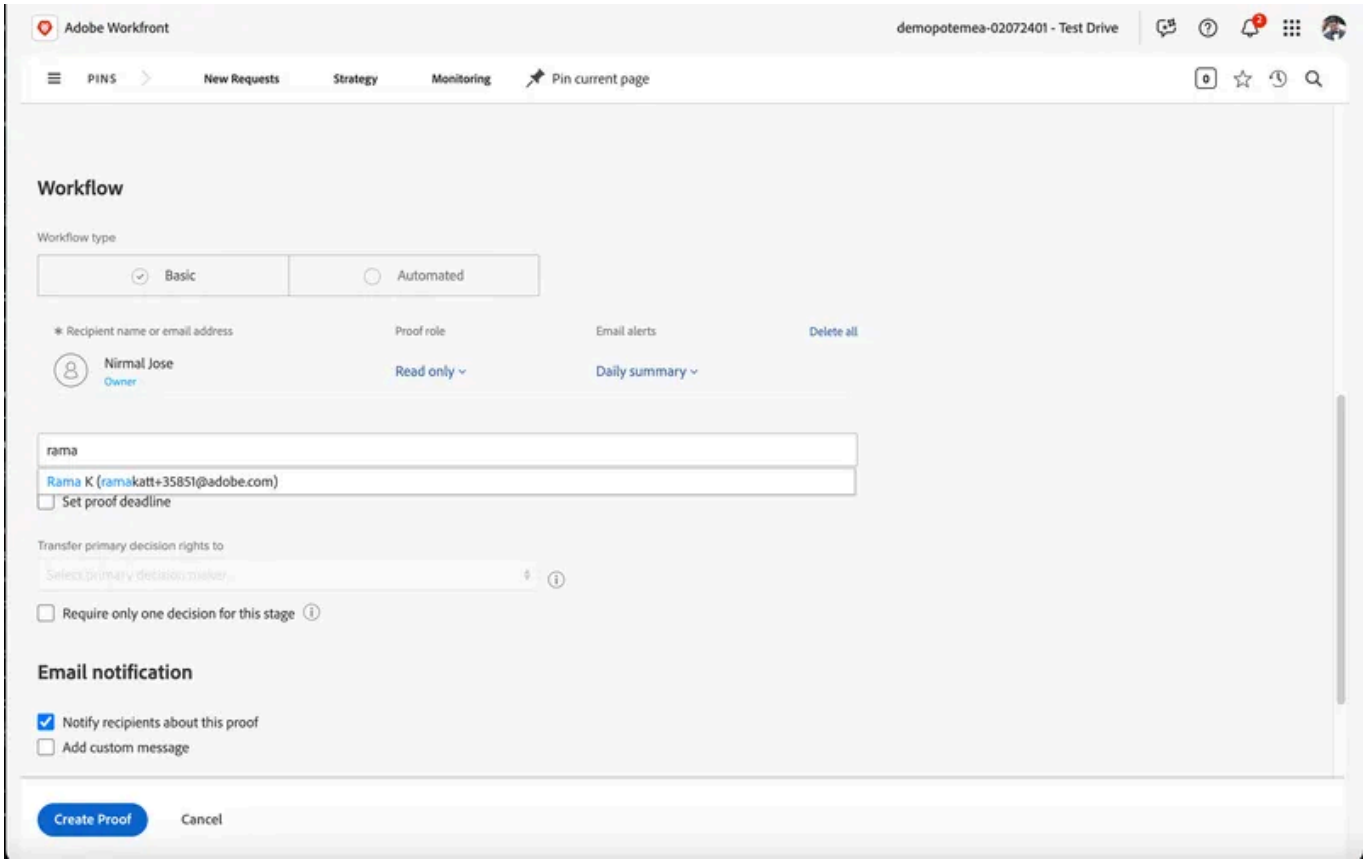


This will open up the *New Proof upload page.* **Add the file** we downloaded and renamed in the previews exercise by *browsing* to your local storage OR *drag and drop* the file.

Update your Proof role as **Read only.** This will ensure the proof is approved as soon as the reviewer approves it.

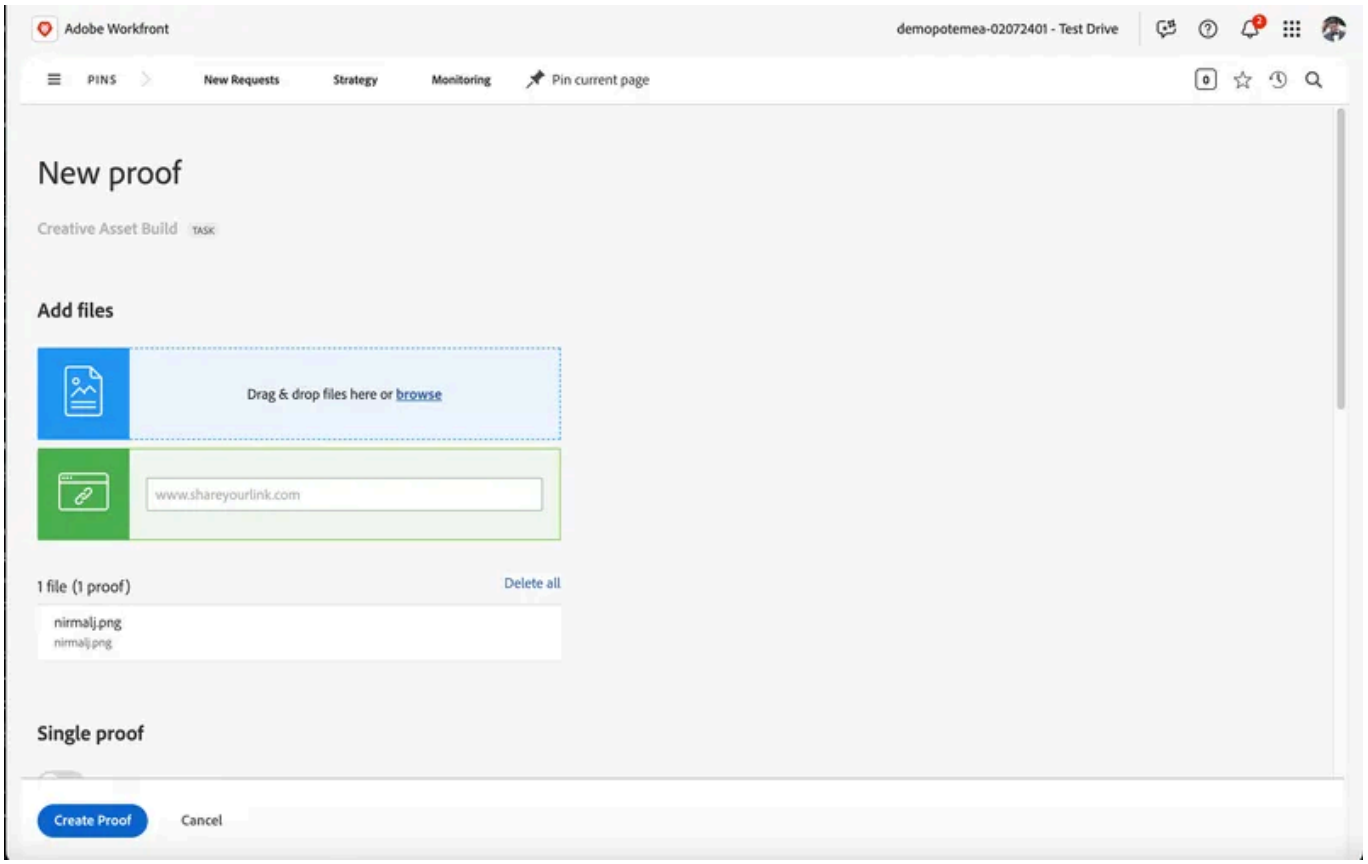


Request your colleague to review your asset. To do this, **add** your colleague by typing the user login ID (their Barclays ID / Name) and select them from the drop down list. In case you are sitting alone, you can update yourself as Reviewer & Approver.



Leave all other fields as the **default** selections.

Click on **Create Proof.**

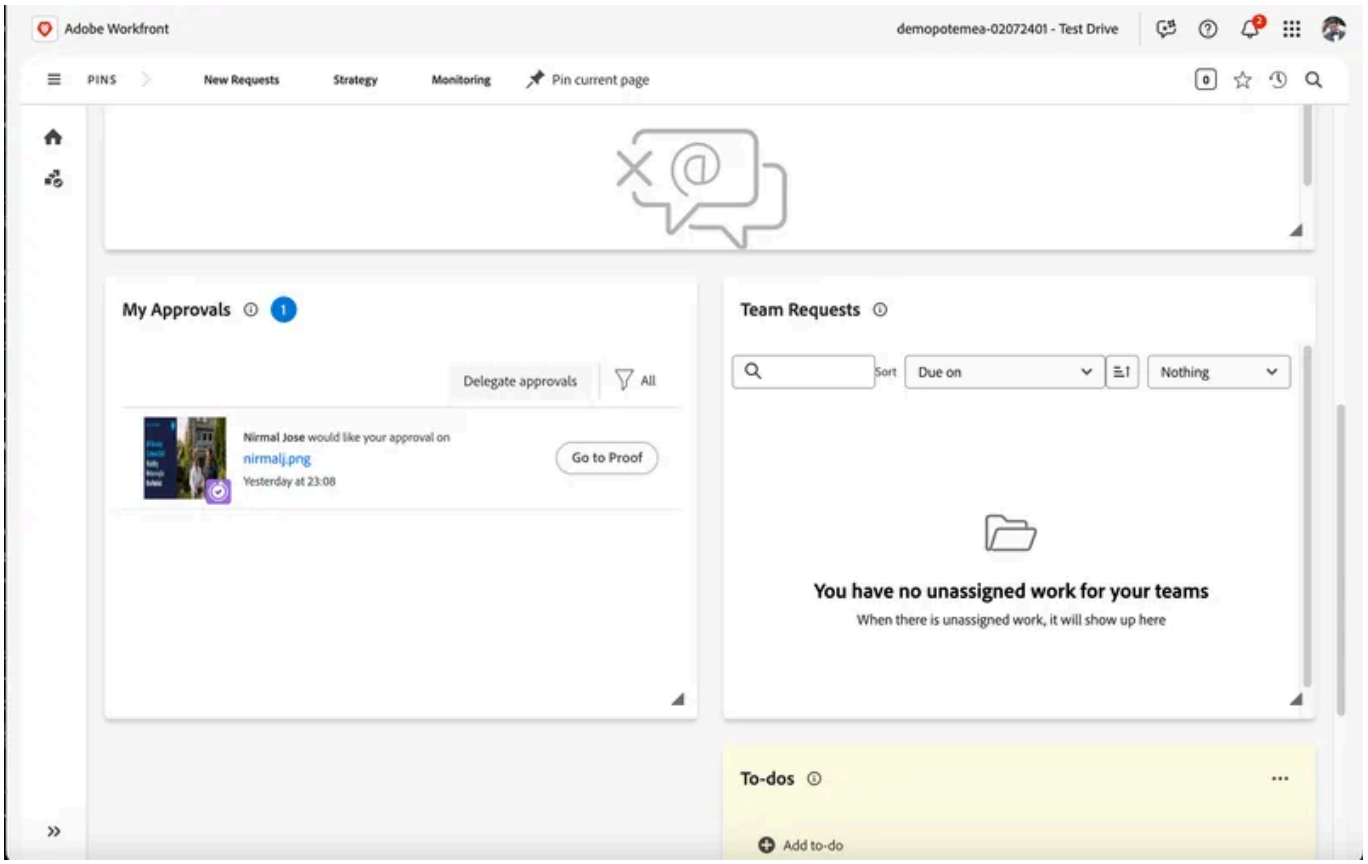


Review and approval

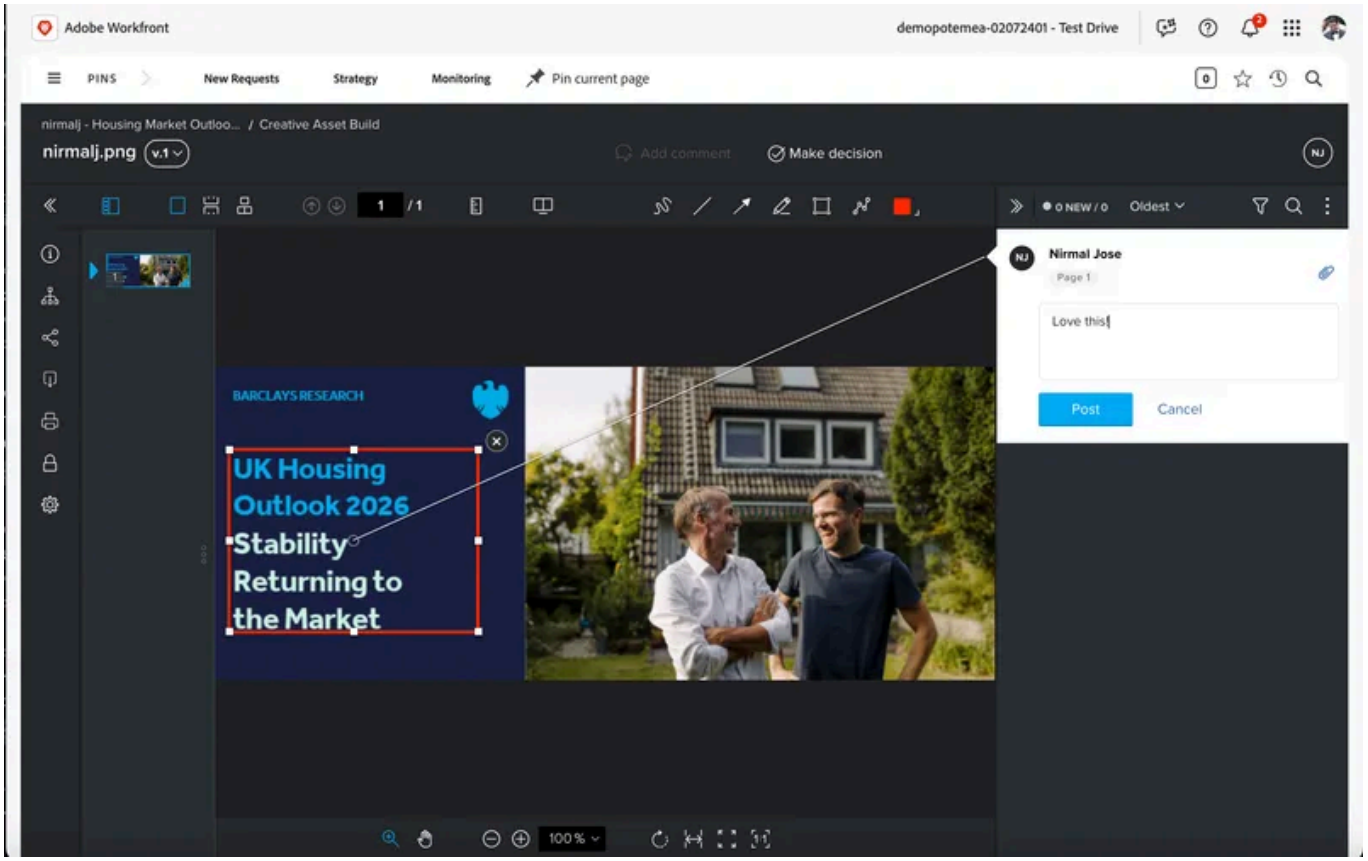
The **Workfront Proof Review and Approval Process** streamlines the way teams collaborate on and finalize assets. It allows stakeholders to review, comment, and approve creative work in a centralized platform, ensuring faster feedback loops and more efficient decision-making. By using Workfront Proof, teams can track changes, manage versions, and ensure that all feedback is addressed before final approval. This process helps maintain consistency, improve accuracy, and reduce time to market.

Click on **Adobe Workfront logo** to go to home dashboard.

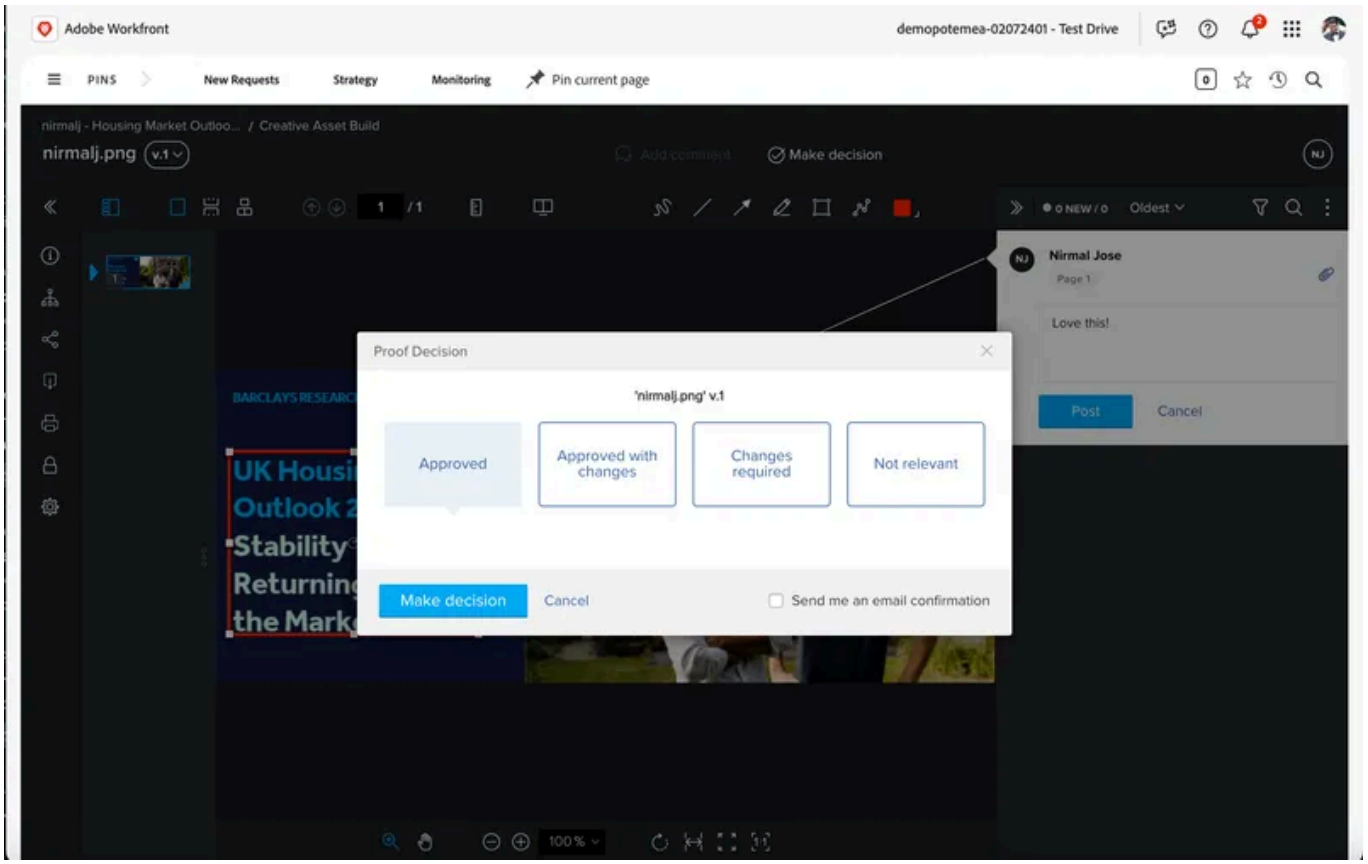
Scroll down to find the item to review on **My approvals** widget. Click on the **Go to Proof** to open the proofing viewer.



Click on **Add comment** where you can comment on the reviewing item.



Click on **Make decision** to show the options and select **Approved** and click **Make decision button** on the popup to approve the changes.

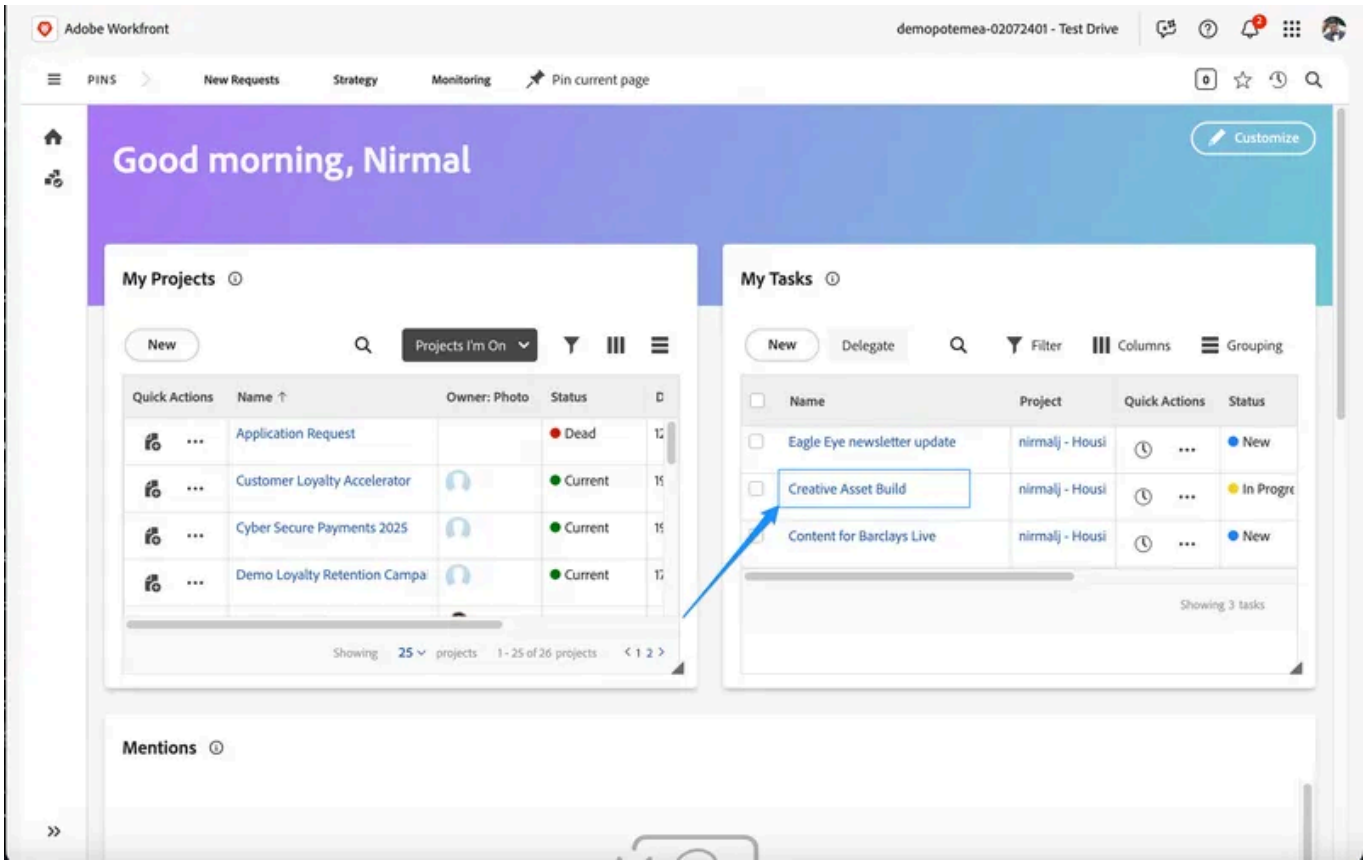


> We did a simple manual approval process by assigning it to a colleague and getting it reviewed and approved. We can setup approval workflows and automations to adjust to the organisation policies and processes.

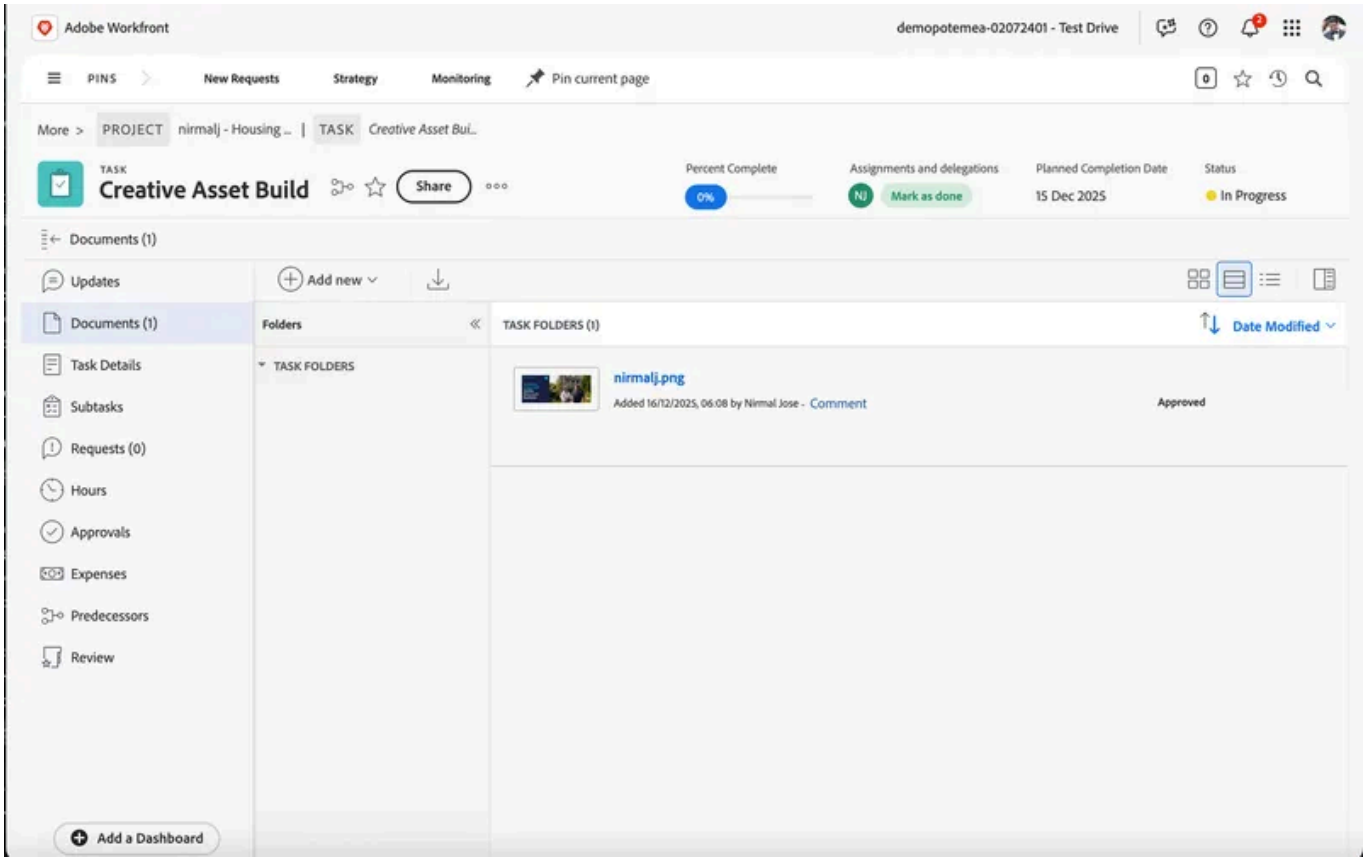
You can close the window once the decision is made by clicking on the **Adobe Workfront logo** on top left.

Verify document status

On the homepage, please click on **Creative Asset Build** task in the **My Tasks** Widget.



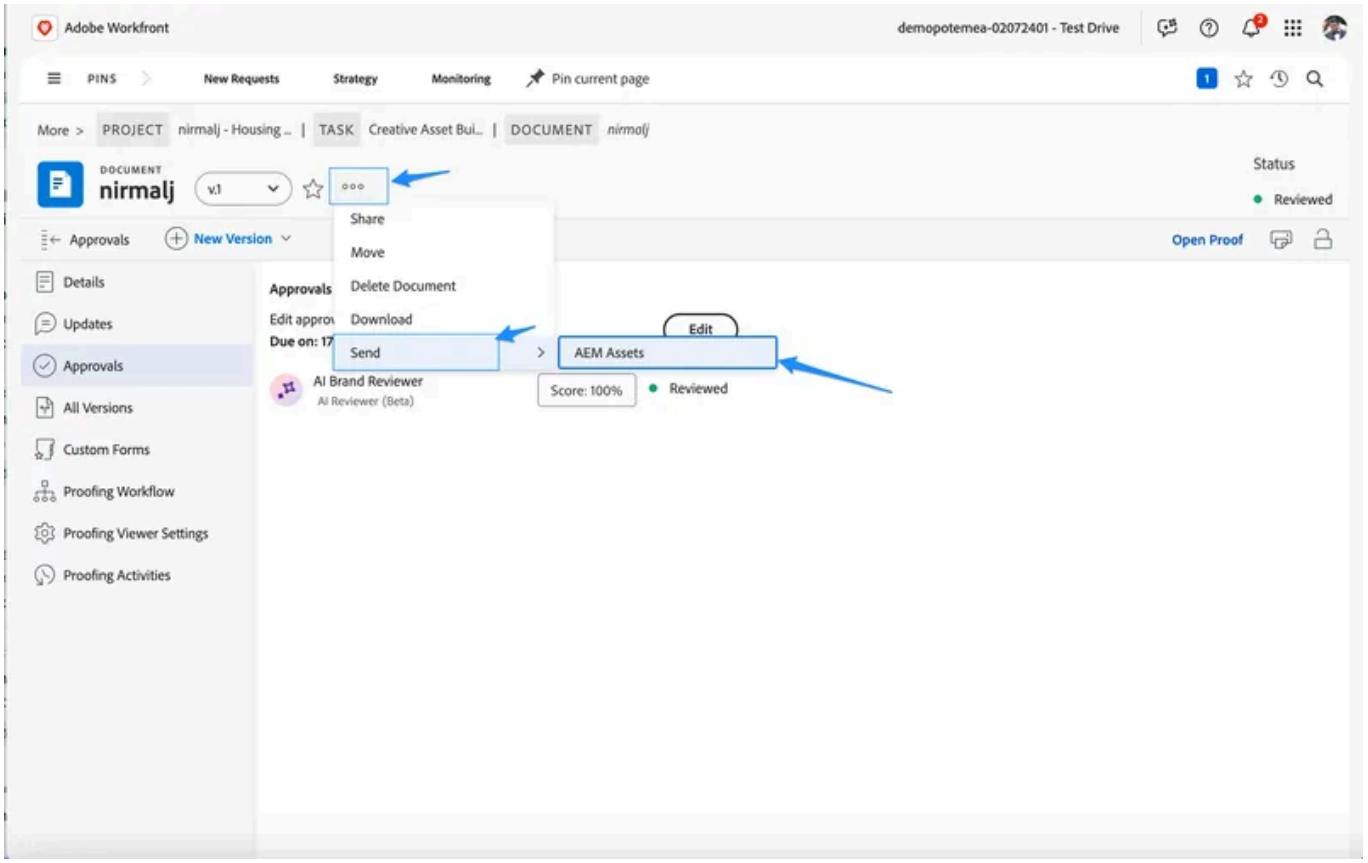
Click on **Documents** section and **click** on the approved document tile. As you can see, all the proof status are completed and document is marked as **Approved**.



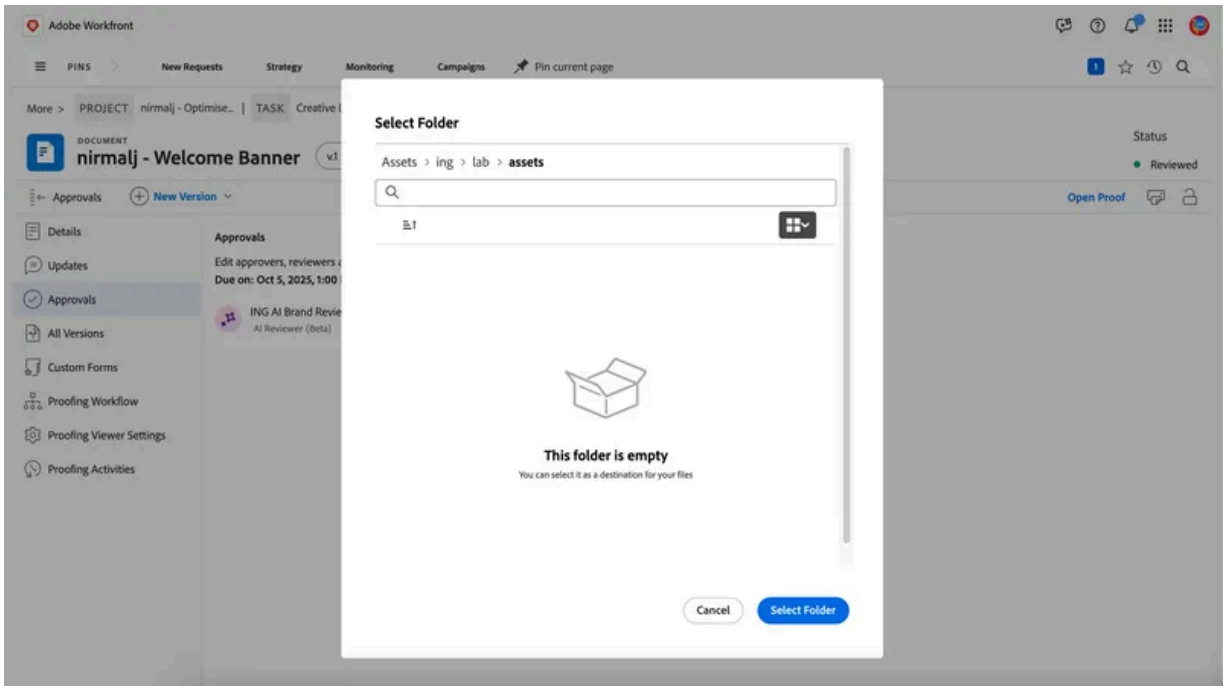
Sending approved assets to AEM Assets

Once an asset is approved in **Workfront**, it can be seamlessly transferred to **Adobe Experience Manager (AEM)** for use in various digital experiences. This integration ensures that only finalized, high-quality assets are published, maintaining consistency across channels. By automating the transfer process, teams can reduce manual effort, prevent versioning issues, and ensure that the latest approved assets are readily available for content creation and delivery.

Click on **••• -icon** next to the document title, go to Send menu and **Select AEM Assets.** This opens a new popup window.



This open the window where we need to select the destination folder in AEM assets. Navigate to **barclays > lab** folder and click **Select Folder.**

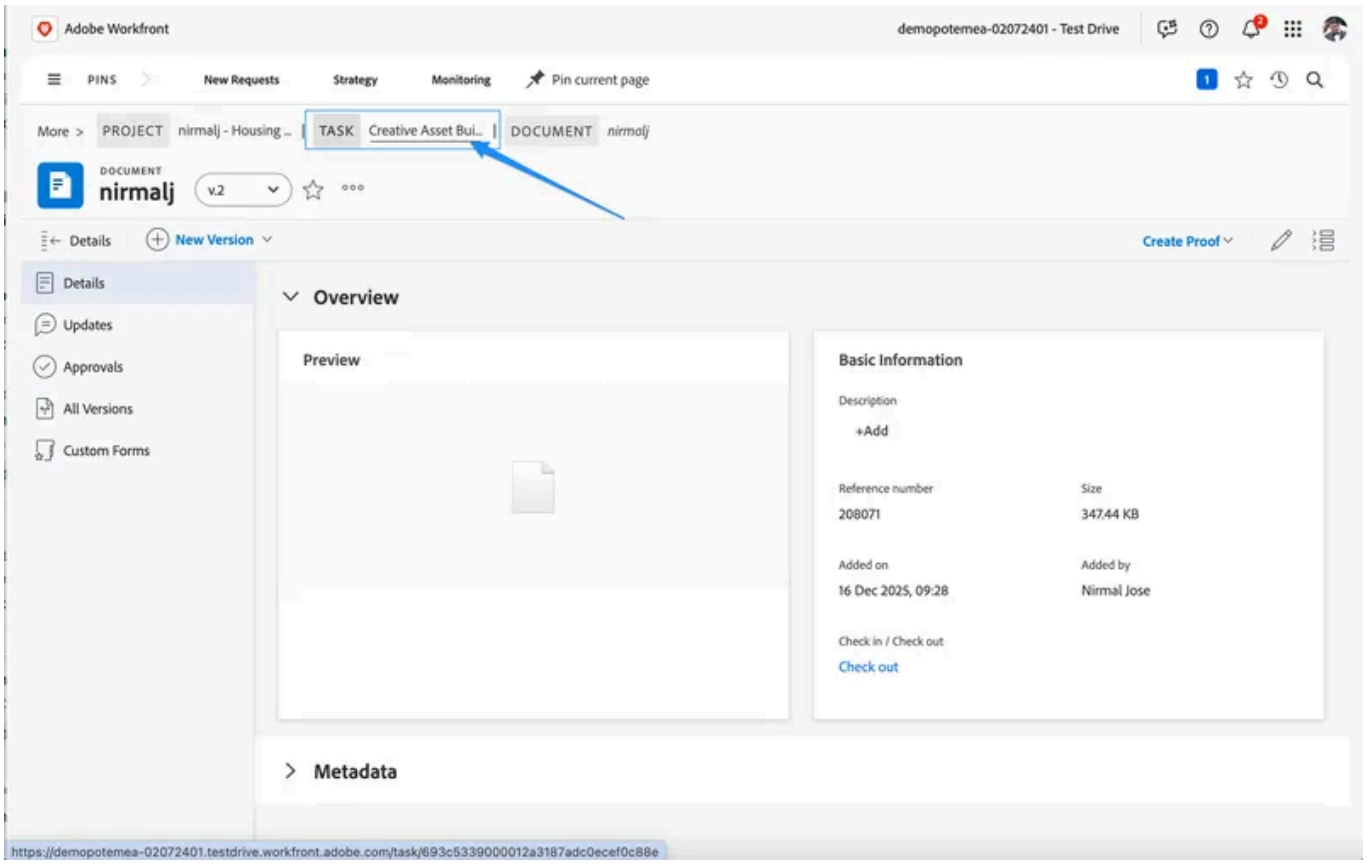


1. This should close the window and will send the asset to AEM Assets. You will get a notification when it is complete.

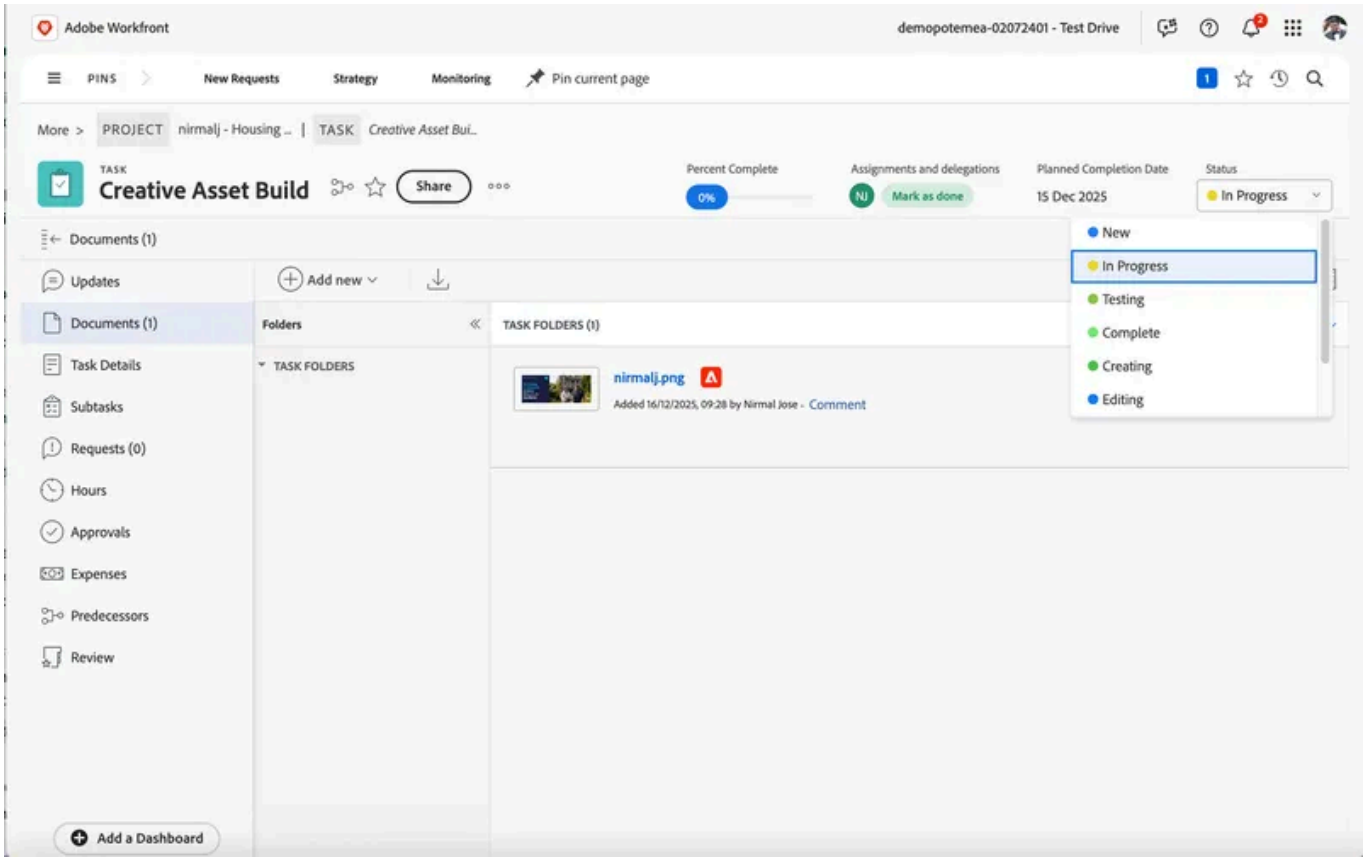
Mark tasks as complete in workfront

Now that you have completed the work needed in the task, lets mark the Status of the task as complete. This ensures other teams are aware that creative team has completed the task.

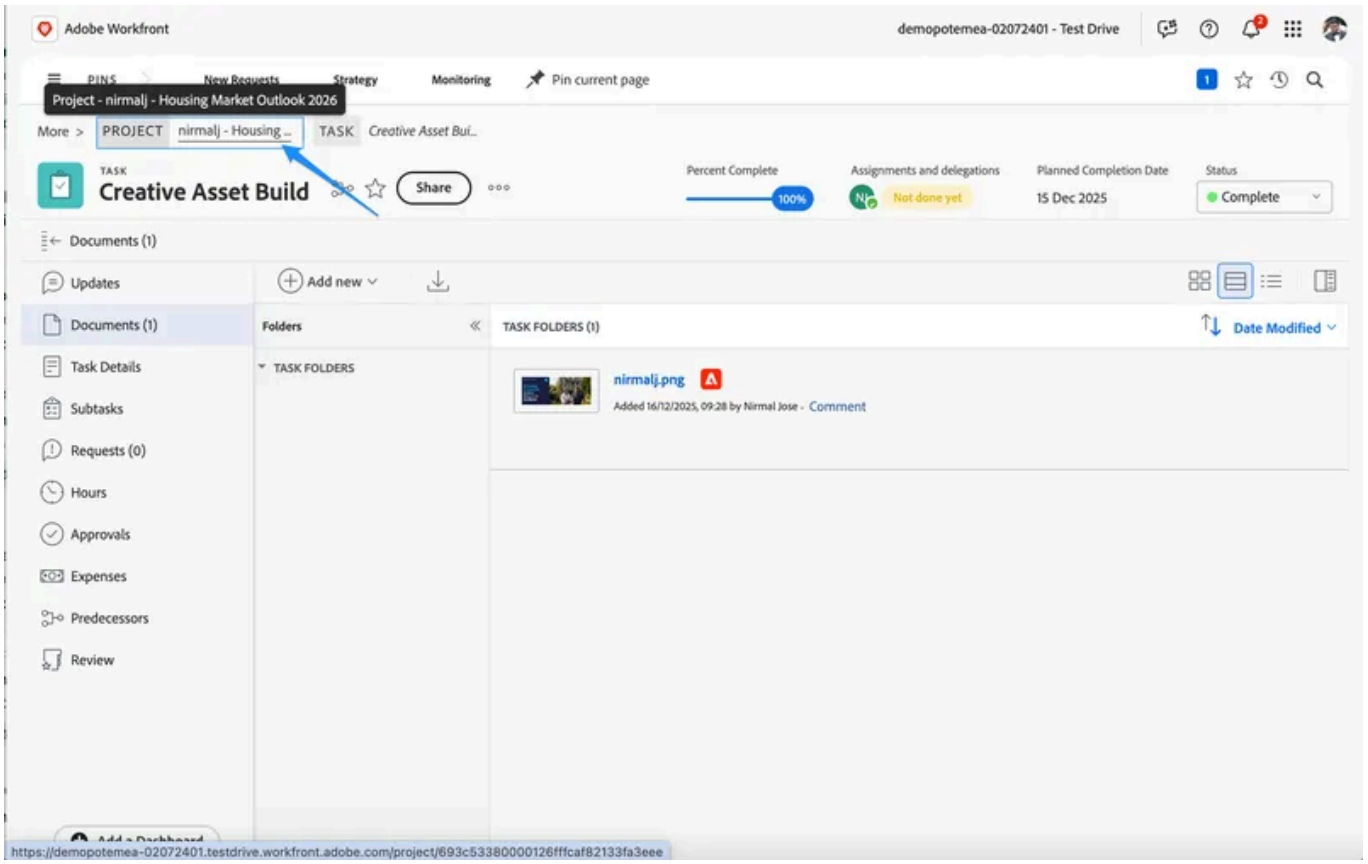
Click on the **Task Creative Layout** in the breadcrumb ribbon menu to go back to the task.



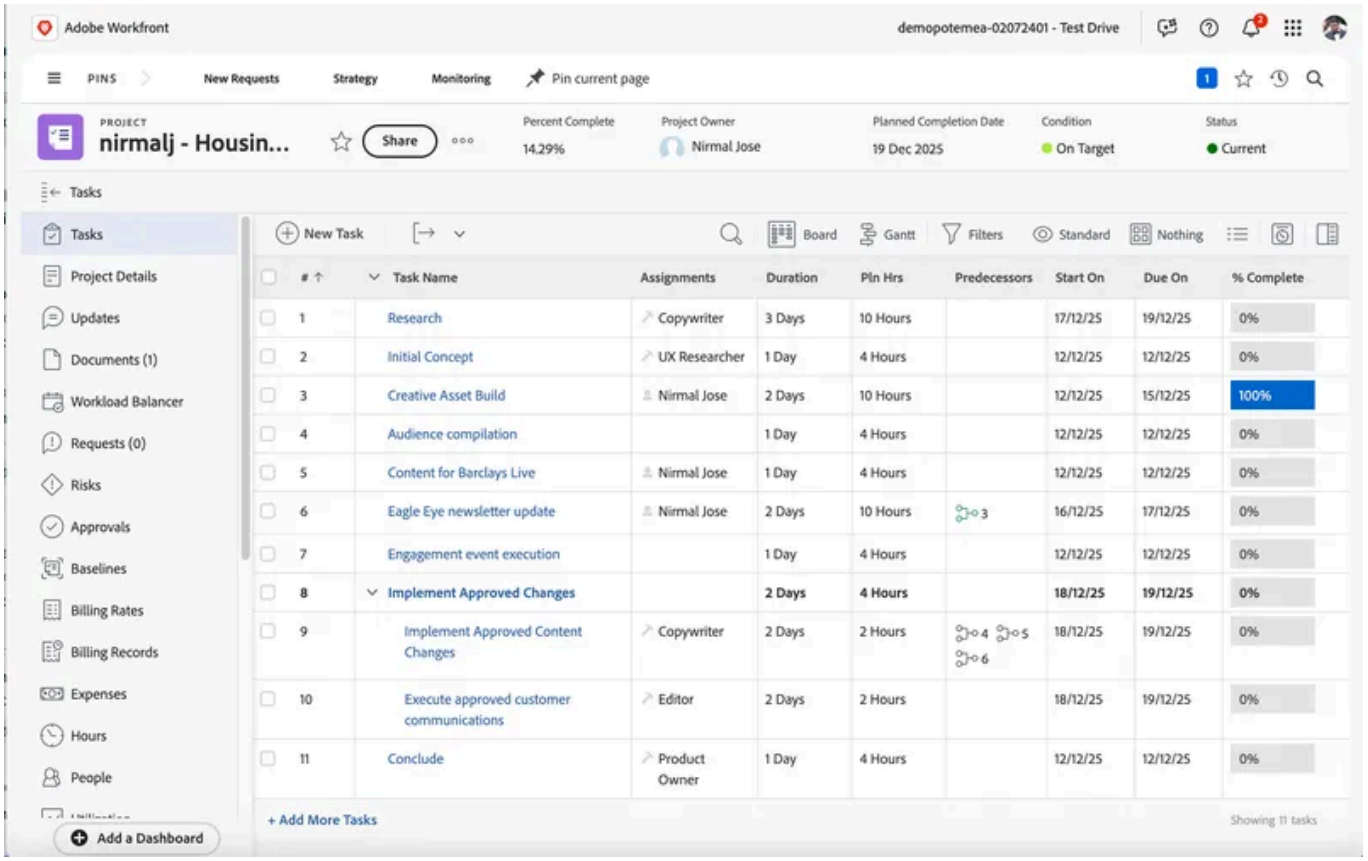
Once we are in the task, click on the **Status** dropdown and select **Complete**.



Click on the **Project name** in the breadcrumb ribbon to go back to the project task list.



You can now see the Creative Asset Build task is marked as **100% complete**.



Since this is a lab instance, we have done the manual review and approval workflow. In production systems, the review and approval workflows are integrated natively to Adobe express or Adobe photoshop so that the creative team can go through content creation, review and approval process via the creative tool itself.

You have now successfully reviewed and approved an asset for the campaign

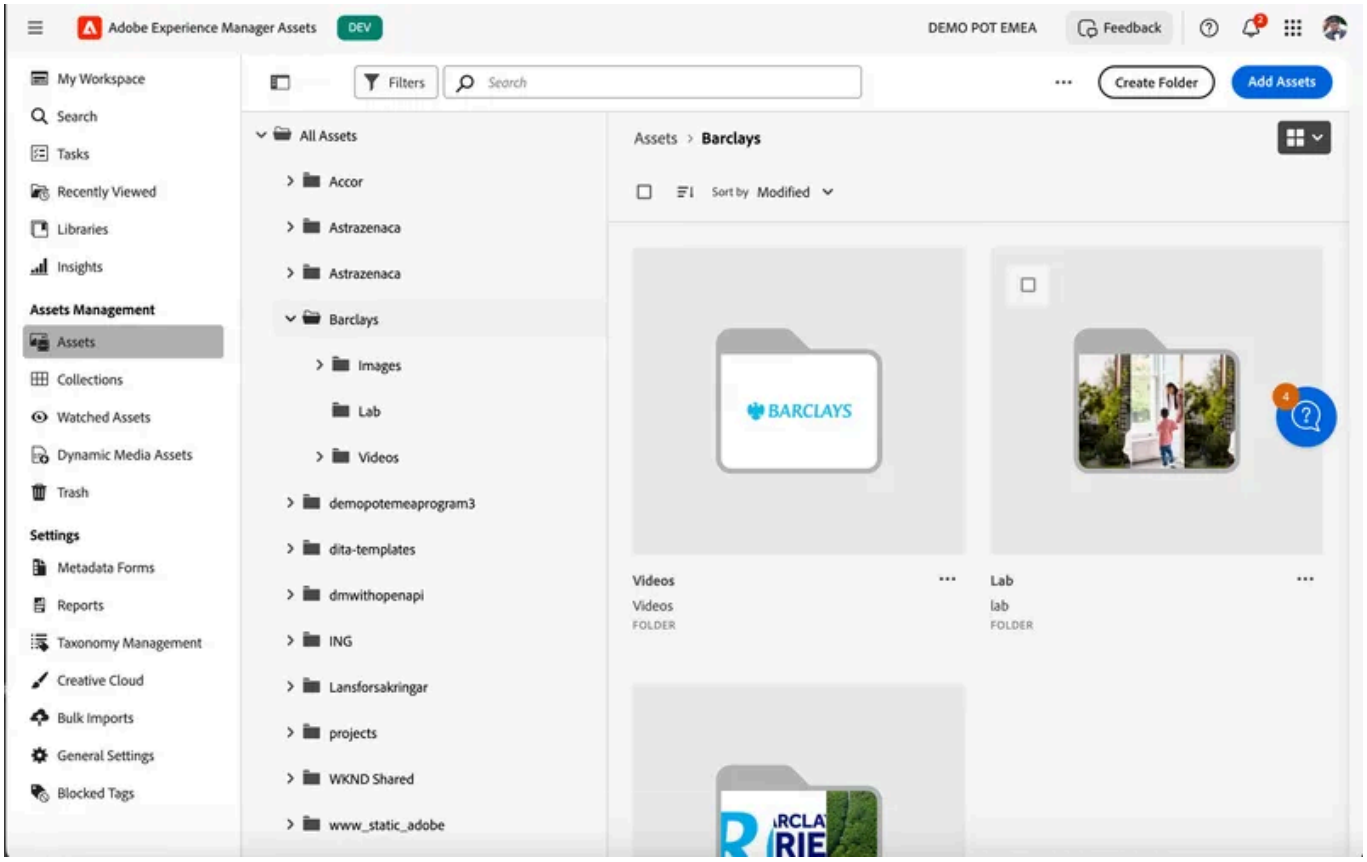
2.2.3. Asset management

Introduction

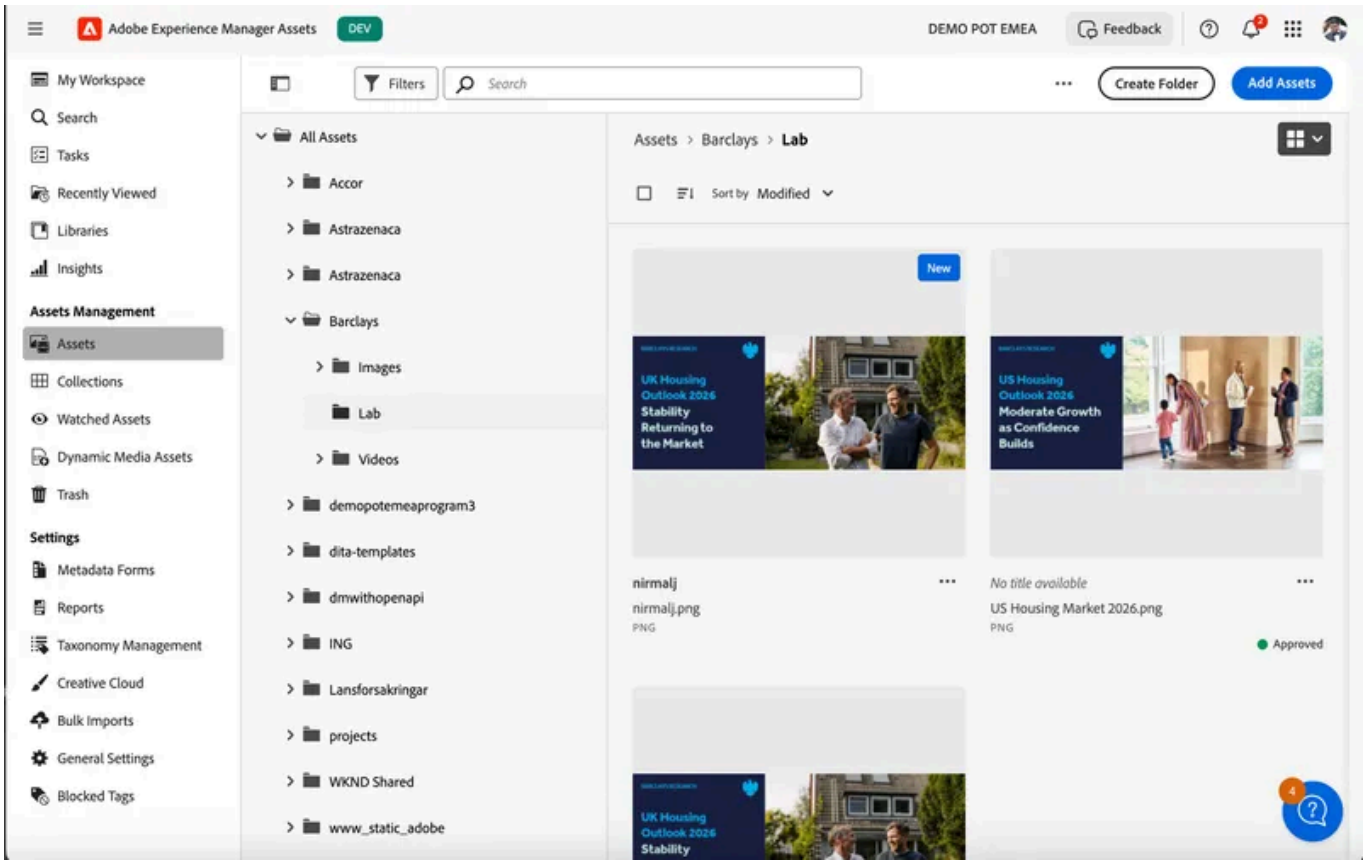
Once an asset is approved in **Workfront**, it can be seamlessly transferred to **Adobe Experience Manager (AEM)** for use in various digital experiences. This integration ensures that only finalized, high-quality assets are published, maintaining consistency across channels. By automating the transfer process, teams can reduce manual effort, prevent versioning issues, and ensure that the latest approved assets are readily available for content creation and delivery.

View Asset in AEM Assets

Open **AEM Assets.** This should show AEM Assets with Barclays folder open on the Folder navigation menu.



Navigate to **Lab folder** by clicking on the folder name to see the asset you sent from Workfront project.



Metadata and renditions in AEM Assets

When transferring approved assets from **Workfront** to **Adobe Experience Manager (AEM)**, ensuring that key metadata is mapped correctly is essential for efficient asset management and accurate searchability. Metadata such as asset title, description, tags, and usage rights can be automatically mapped from Workfront to AEM, enabling better organization and faster retrieval.

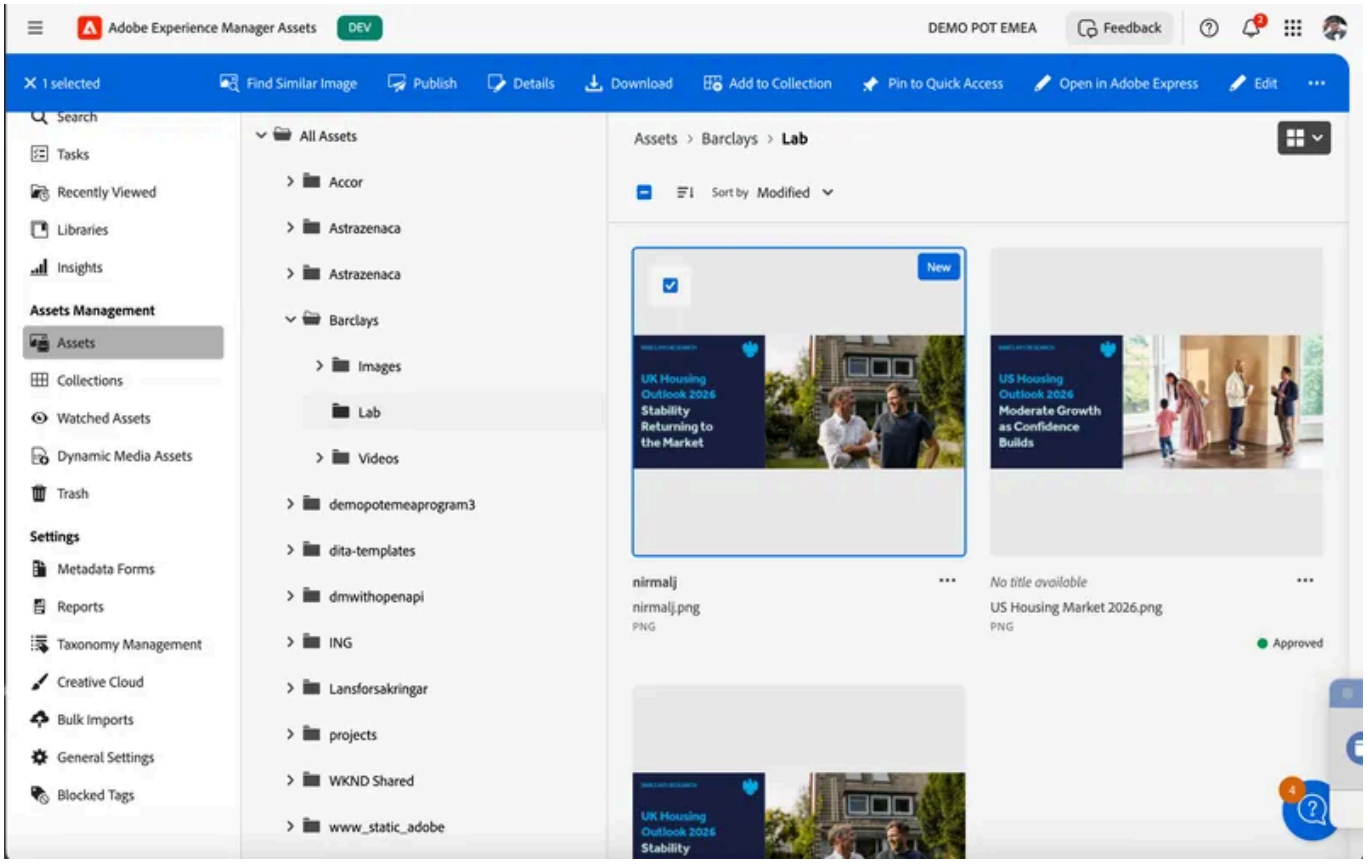
In addition to metadata, AEM supports various **renditions** to optimize asset delivery across different platforms and devices:

- **Static Renditions** – Predefined, fixed-size versions of the asset for consistent display.
- **Dynamic Renditions** – On-demand resizing or reformatting of assets based on delivery requirements.
- **Smart Crop Renditions** – AI-powered cropping that automatically adjusts the focal point to highlight the most important part of the asset, ensuring optimal presentation across different screen sizes.

By mapping metadata and utilizing renditions, teams can streamline content management, enhance content delivery, and improve the overall customer experience.

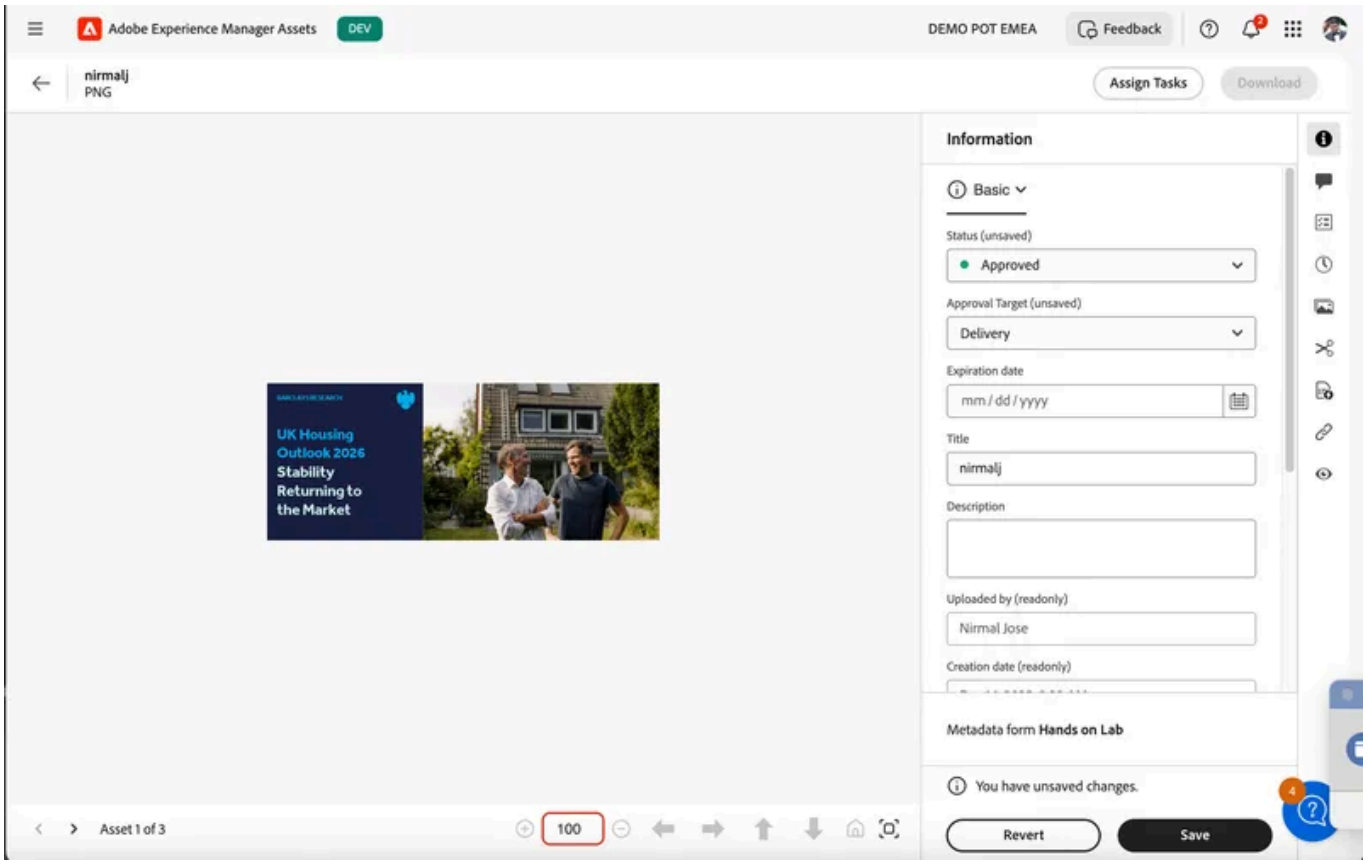
Lets see it in action.

Click on the **asset tile** to select it and click on **Details** in the top blue menu bar to go into the asset.

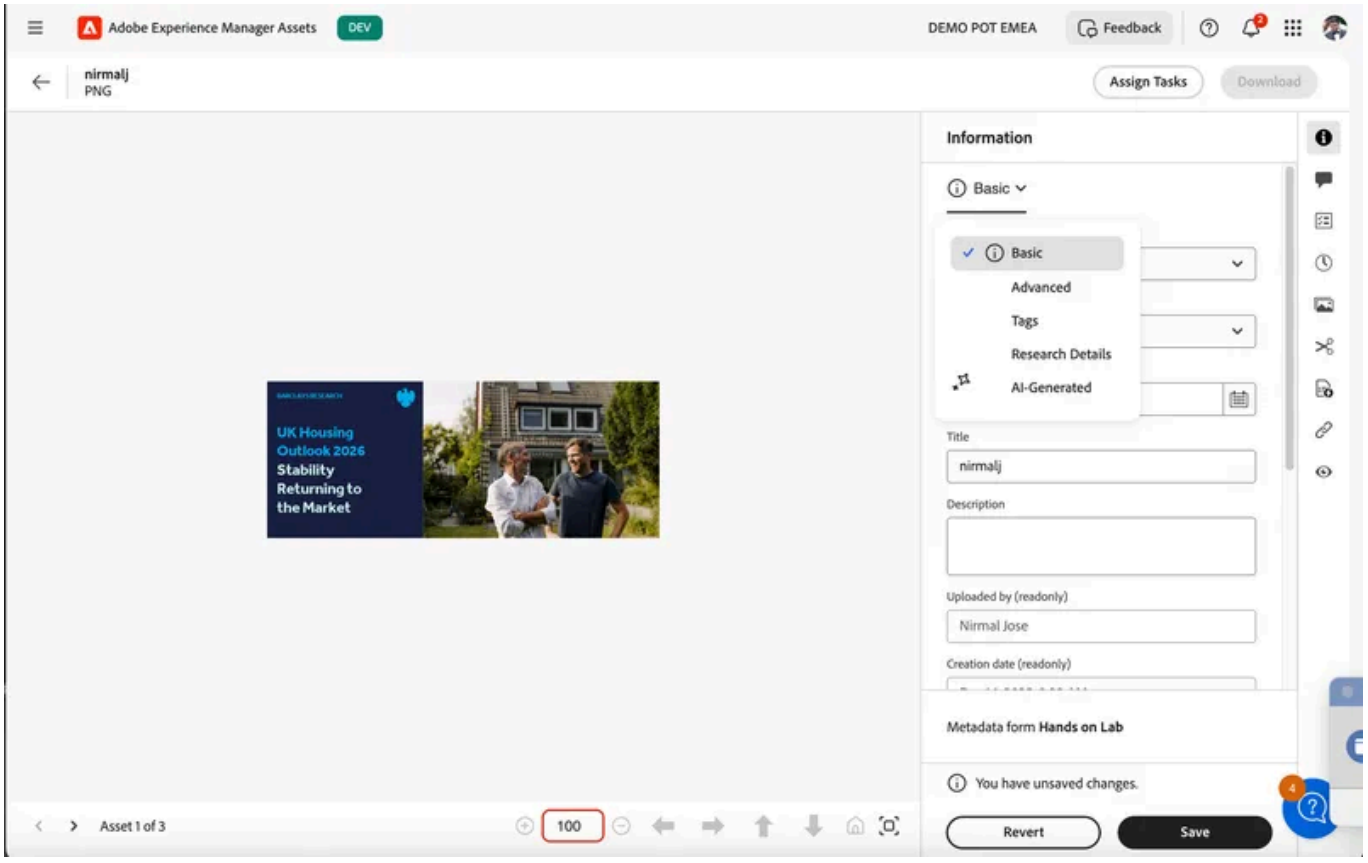


On the right hand side menu, you will see all the information of the asset. Select Status as **Approved** and Approval Target as **Delivery.** Click **Save** at the bottom.

This is normally auto-configured to pick up the asset status from workfront.

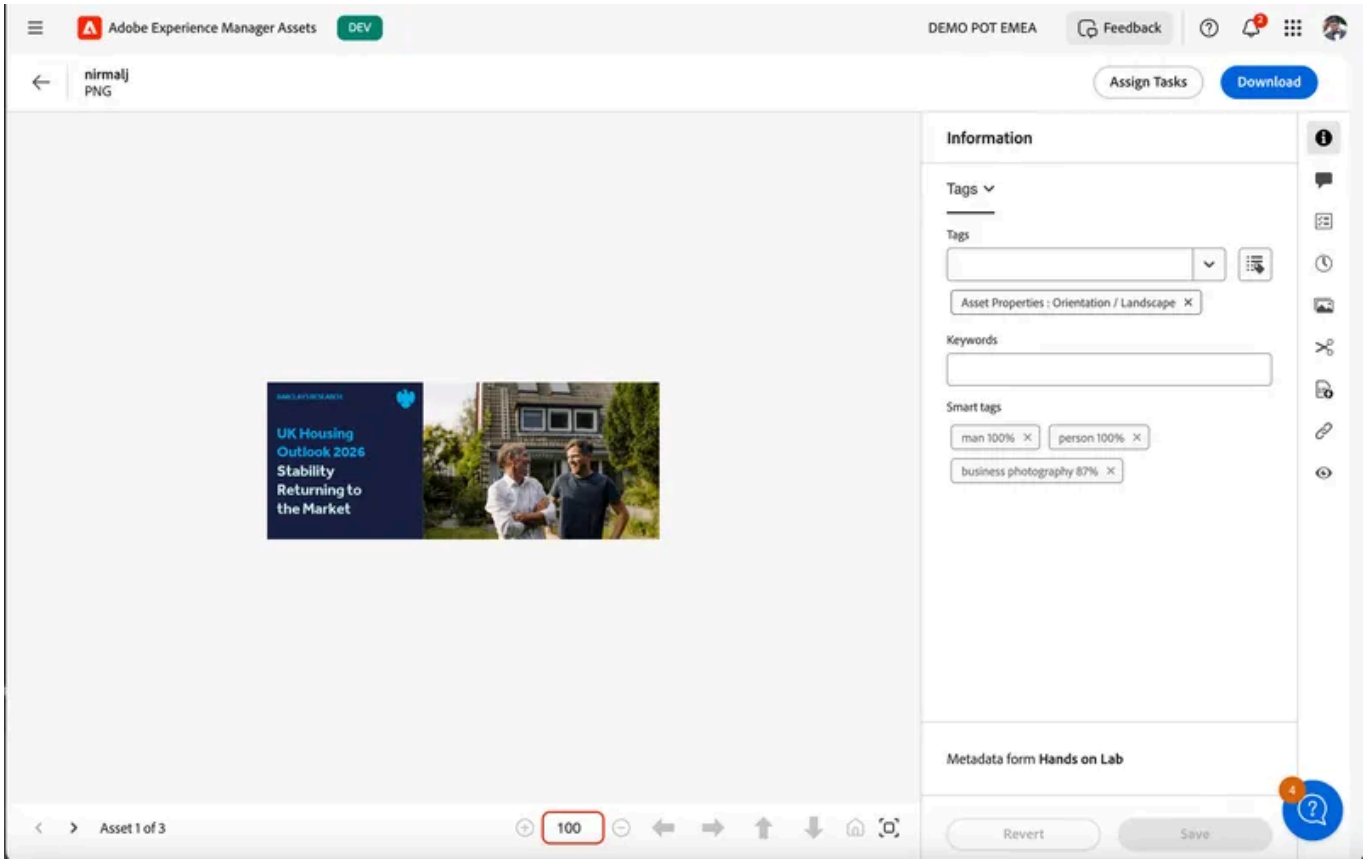


Click on **-icon** next to Basic to show the other metadata tabs.

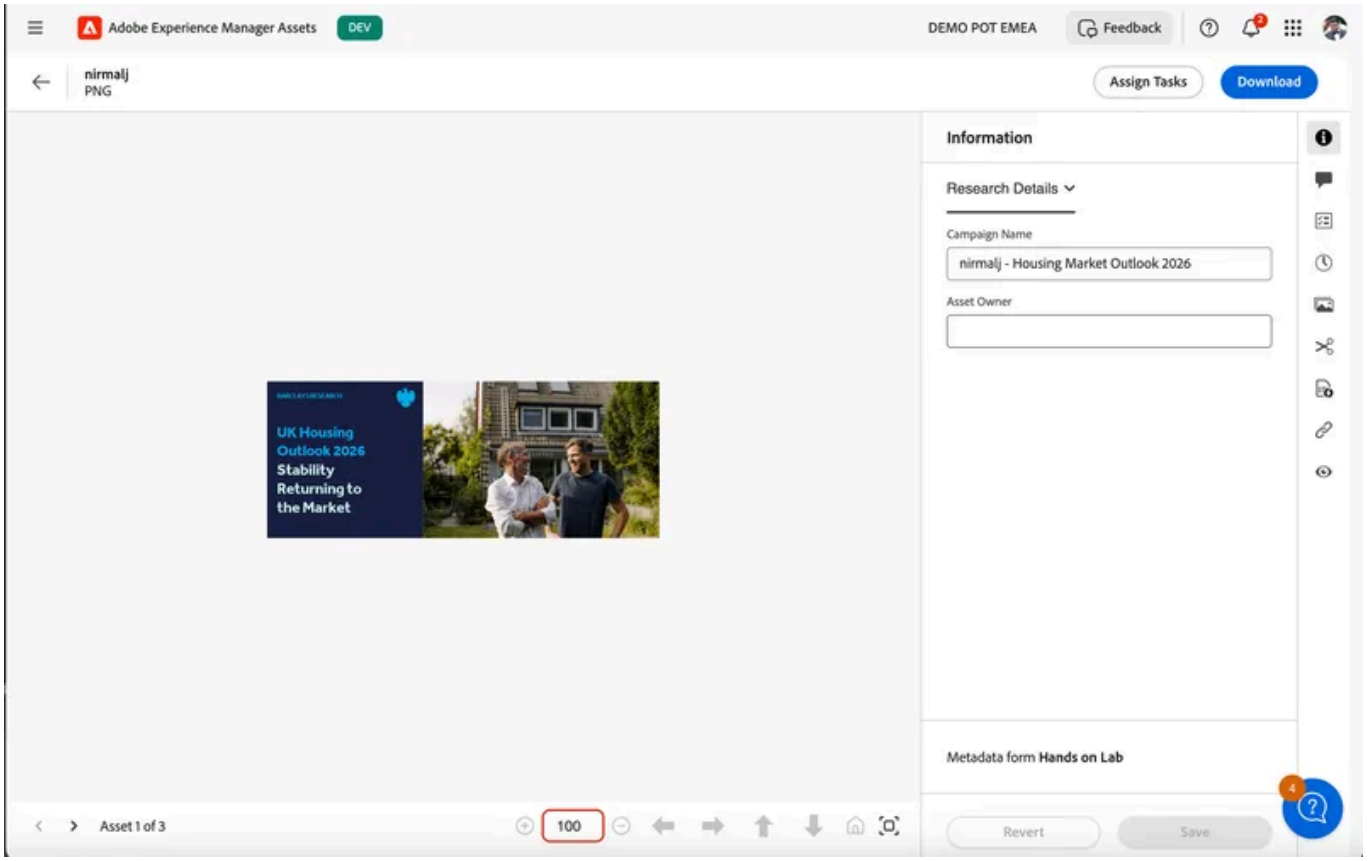


Click on the dropdown and select **Tags** to see all the tags on the assets. As you can see, it understand the Orientation and it tags with various other smart tags (powered by Adobe

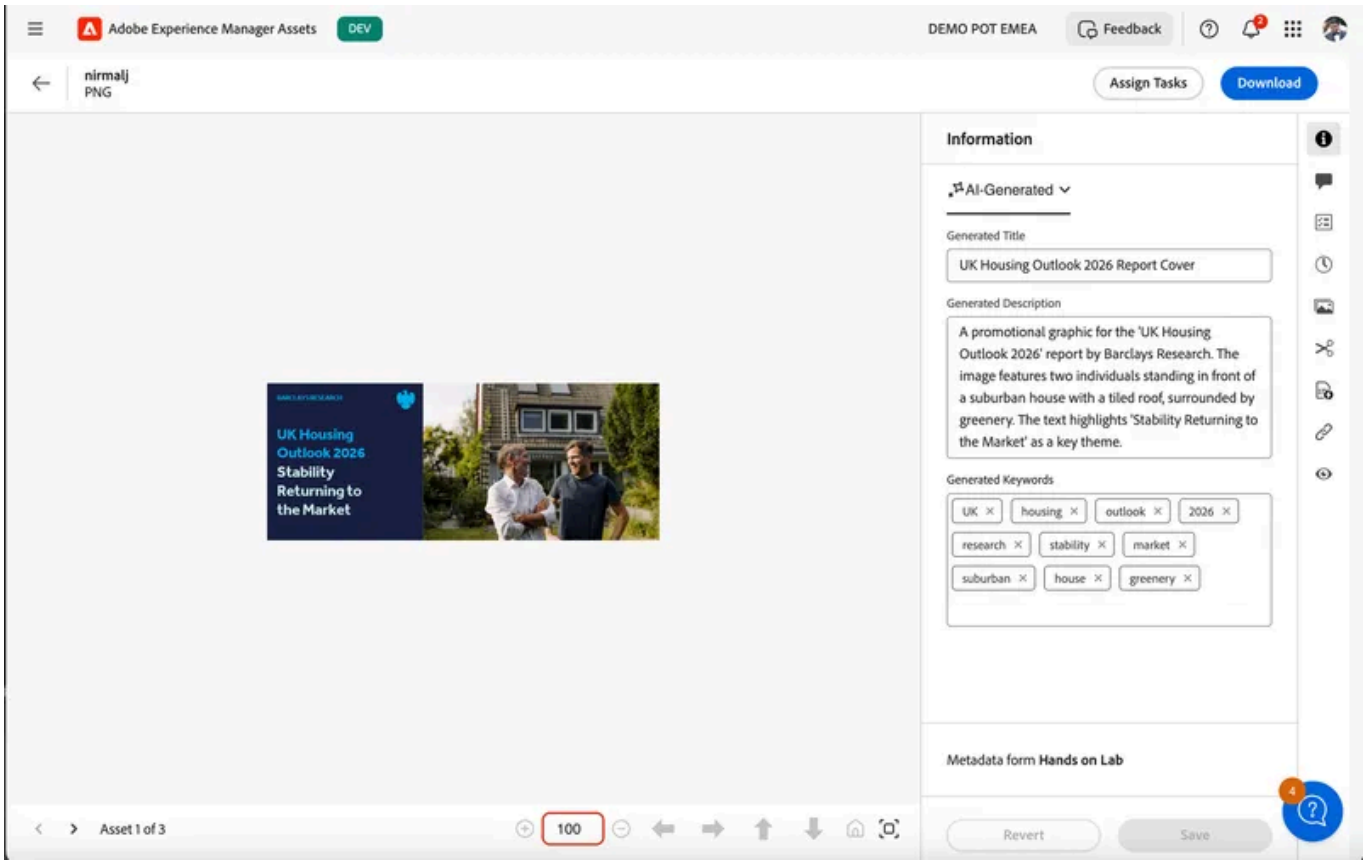
Sensei) to increase the discoverability and ease of management of the asset.



Click on the dropdown to select **Research details** tab to see the research information sent from workfront. This metadata very useful in tracing the asset history and in search. We can configure to sent any workfront information to be sent as a metadata for the asset.



Click on **AI-Generated** tab to see how AI has processed the information on the asset. You can see a more human friendly title called generated title, as well as Generated description and Generated keywords. All these help to discover your assets while searching for assets and there by improving the reuse of the assets.



With assets available in AEM assets, it is now available to be used in any customer journeys in any channels.

> You have now successfully created an asset and its various smart renditions of it in AEM Assets and published it to made it available for using it in any delivery channels like email or web.

2.2.4. Project health check

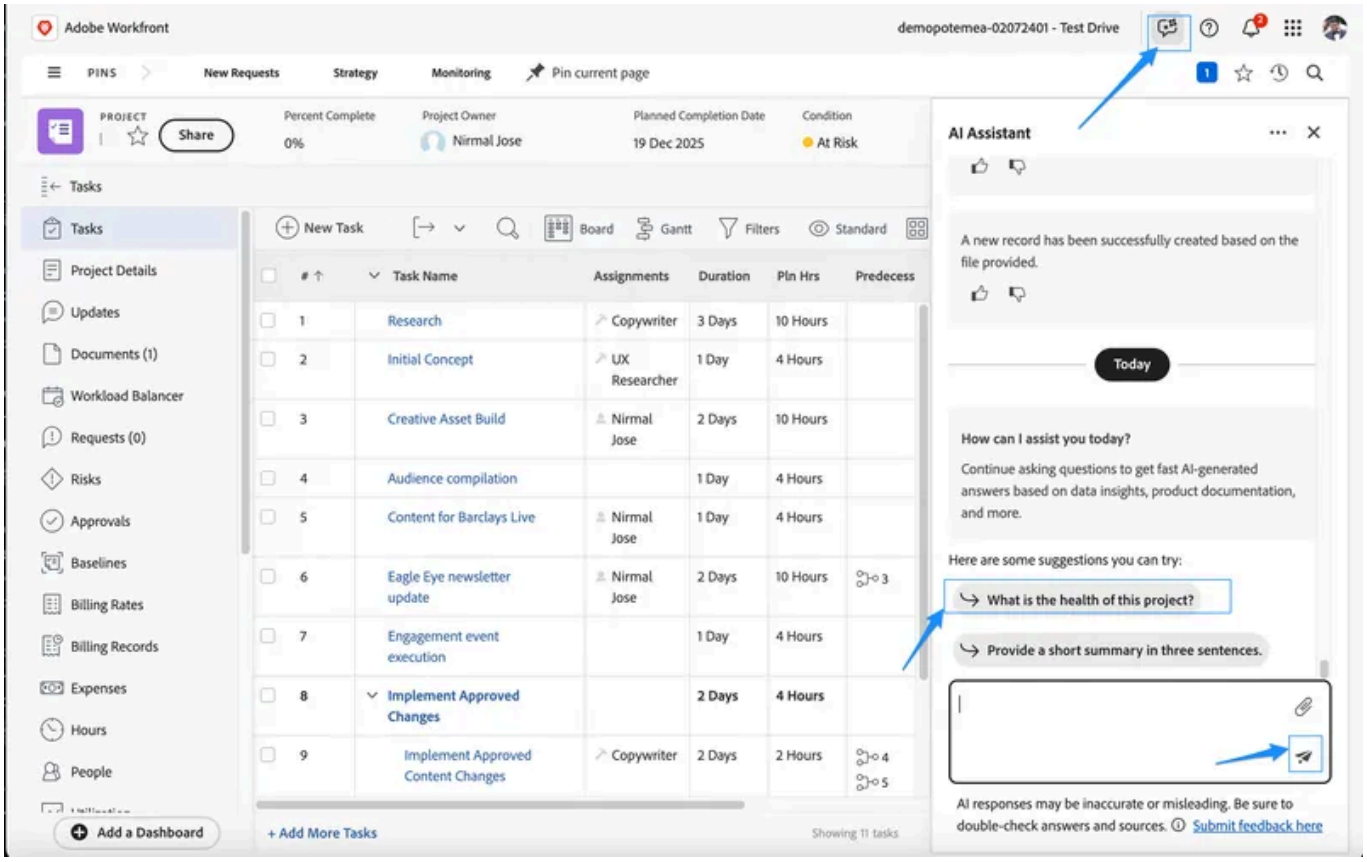
Introduction

The Project Health functionality in Adobe Workfront is an AI-powered feature designed to provide actionable insights into the status and risk profile of projects. Its primary goal is to help project managers and stakeholders:

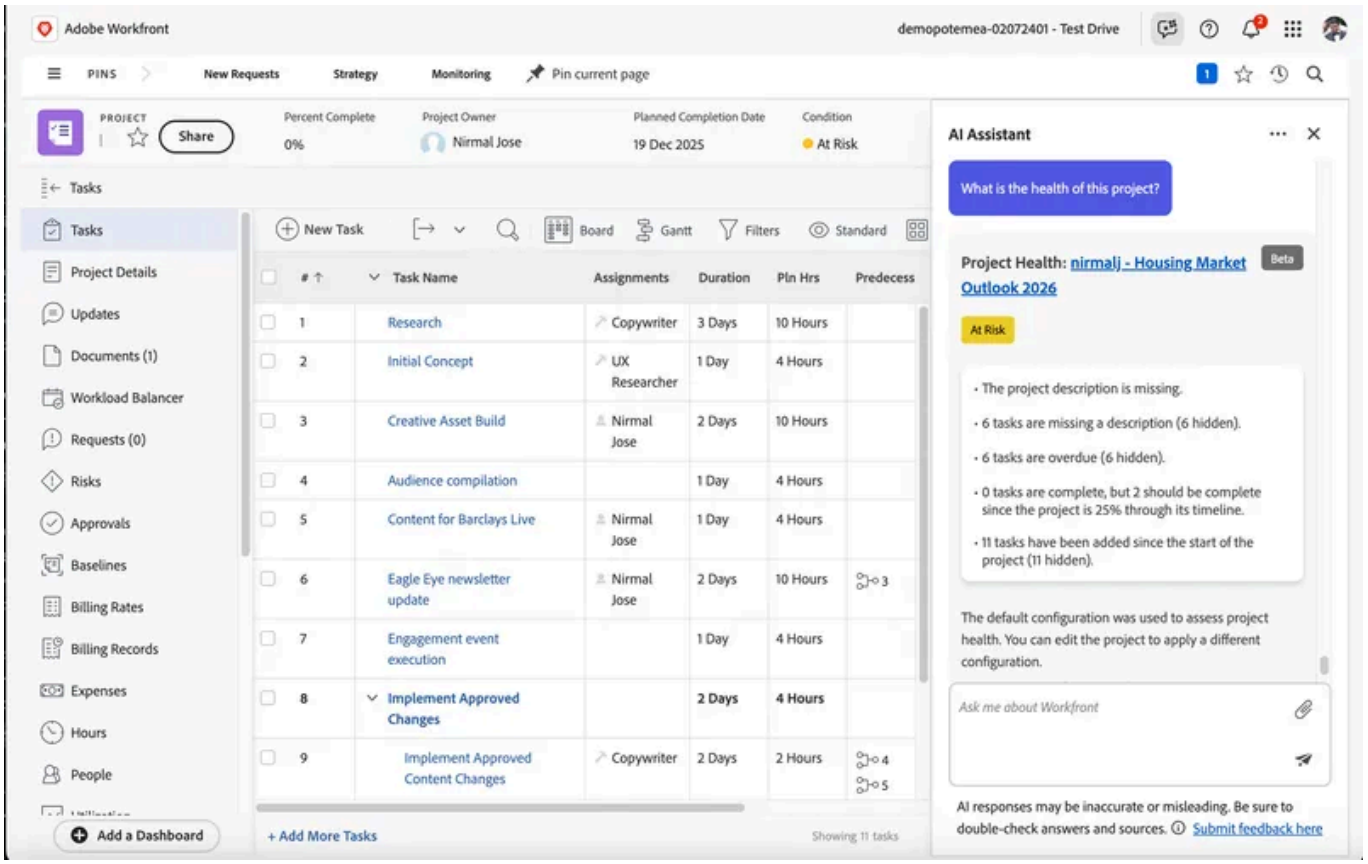
- Quickly assess project health
- Identify high-risk projects
- Prioritize attention and resources
- Spot patterns of risk across a portfolio

Ask the workfront AI assistant

Click on **AI Assistant icon** in the top ribbon menu to open the workfront AI assistant pane and ask `What is the health of this project?`



The AI assistant will use a configured Project health configuration to access the project and report back with a summary of the project health as below. This is currently in Beta and more improvements are planned on this feature. Read **documentation** for more information



You have now successfully checked the project status with AI assistant.

3. Lab 2 - Execution

3.1. Demo: Marketo+Workfront Better Together

3.2. Getting Started

Welcome to the Marketo Hands-on Lab

Welcome to the "Getting Started" section of the Marketo Hands-On Lab.

This foundational section is designed to smoothly transition you into the Marketo learning environment. It's the first step in your journey to mastering Marketo's powerful marketing automation tools. Ideal for beginners or those needing a refresher, this section ensures you're well-prepared to make the most out of the subsequent, more advanced modules.

To begin your Marketo learning journey, head over to the **"Logging In"** page.

https://experience.adobe.com/#/@demopotemea/home

Embark on your Marketo learning adventure with confidence!

3.3. Profile and Data

Overview

Welcome to the **Profile & Data** module of the Marketo Hands-On Lab.

This module is designed to provide an in-depth understanding of how to effectively manage profiles and data within Marketo. Whether you are a marketing professional, data analyst, or campaign manager, this module will equip you with the knowledge and skills to harness the power of data in Marketo.

What You Will Learn:

1. **Understanding User Profiles:** Delve into the intricacies of user profiles in Marketo. Learn how to create, edit, and manage profiles to ensure they align with your marketing goals.
2. **Activity Logs and User Behavior:** Get insights into how activity logs can be a powerful tool for understanding user interactions. Discover how to track, analyze, and use this data to refine your marketing strategies.
3. **Data Management and List Handling:** Explore the best practices for handling data lists in Marketo. Learn the processes of uploading, updating, and maintaining lists to ensure maximum efficiency and accuracy in your marketing efforts.
4. **Data-driven Decision Making:** Understand how to use profile and data insights to make informed decisions. Learn to analyze user data and activity logs to enhance the effectiveness of your marketing campaigns.

Exercises:

- **Exercise 1: Profile & Activity Logs**
  - Focus on creating and editing user profiles, understanding activity logs, and analyzing user engagement.
- **Exercise 2: List Upload**
  - Learn about preparing and uploading data lists, managing lists in Marketo, and integrating lists with marketing campaigns.

Target Audience:

This module is ideal for anyone looking to deepen their understanding of data management in Marketo, including marketing professionals, data analysts, and campaign managers.

Duration:

The estimated completion time is approximately 15 minutes.

Getting Started:

To begin, navigate to the **Exercise 1: Profile & Activity Logs** page, where you will find detailed instructions and hands-on tasks to kickstart your learning journey in managing profiles and data within Marketo.

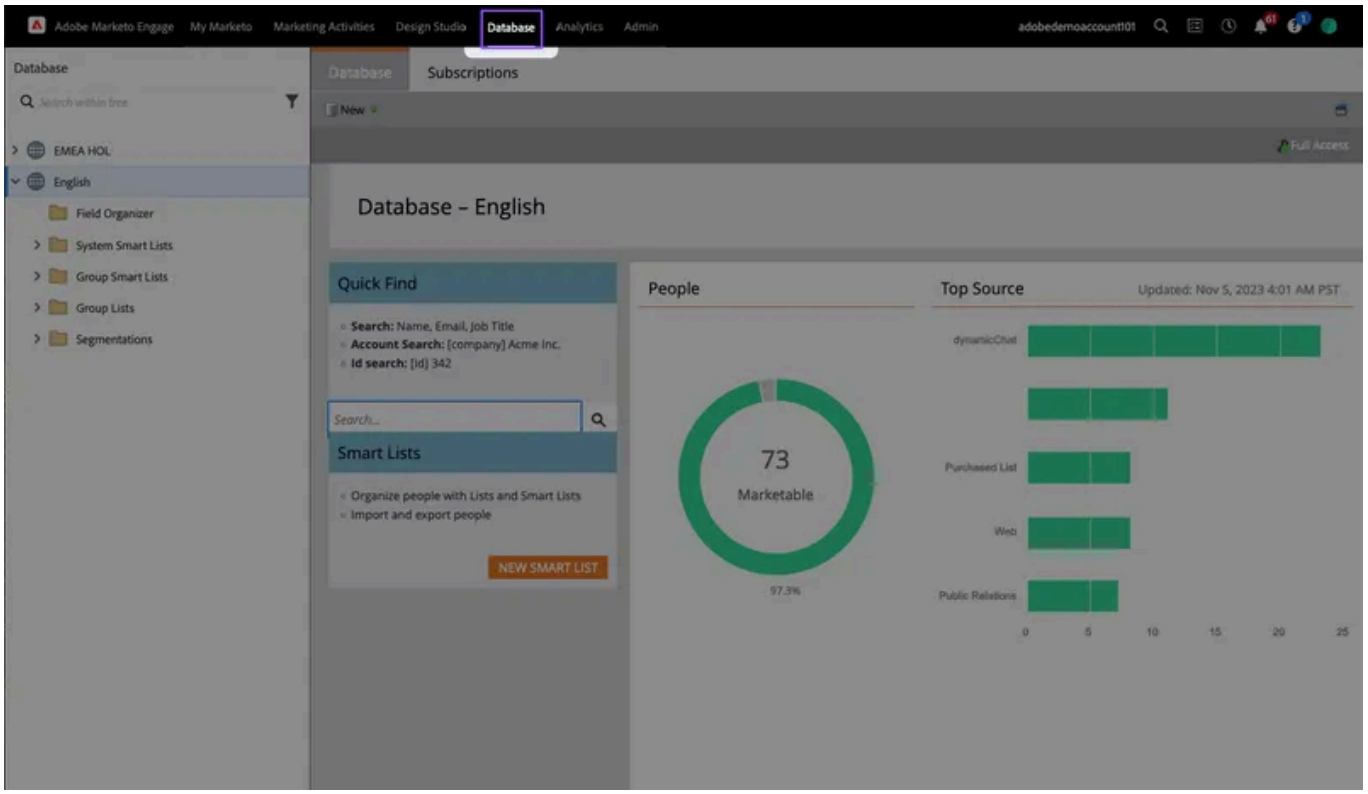
3.3.1. Profiles & Activity Logs

Objective:

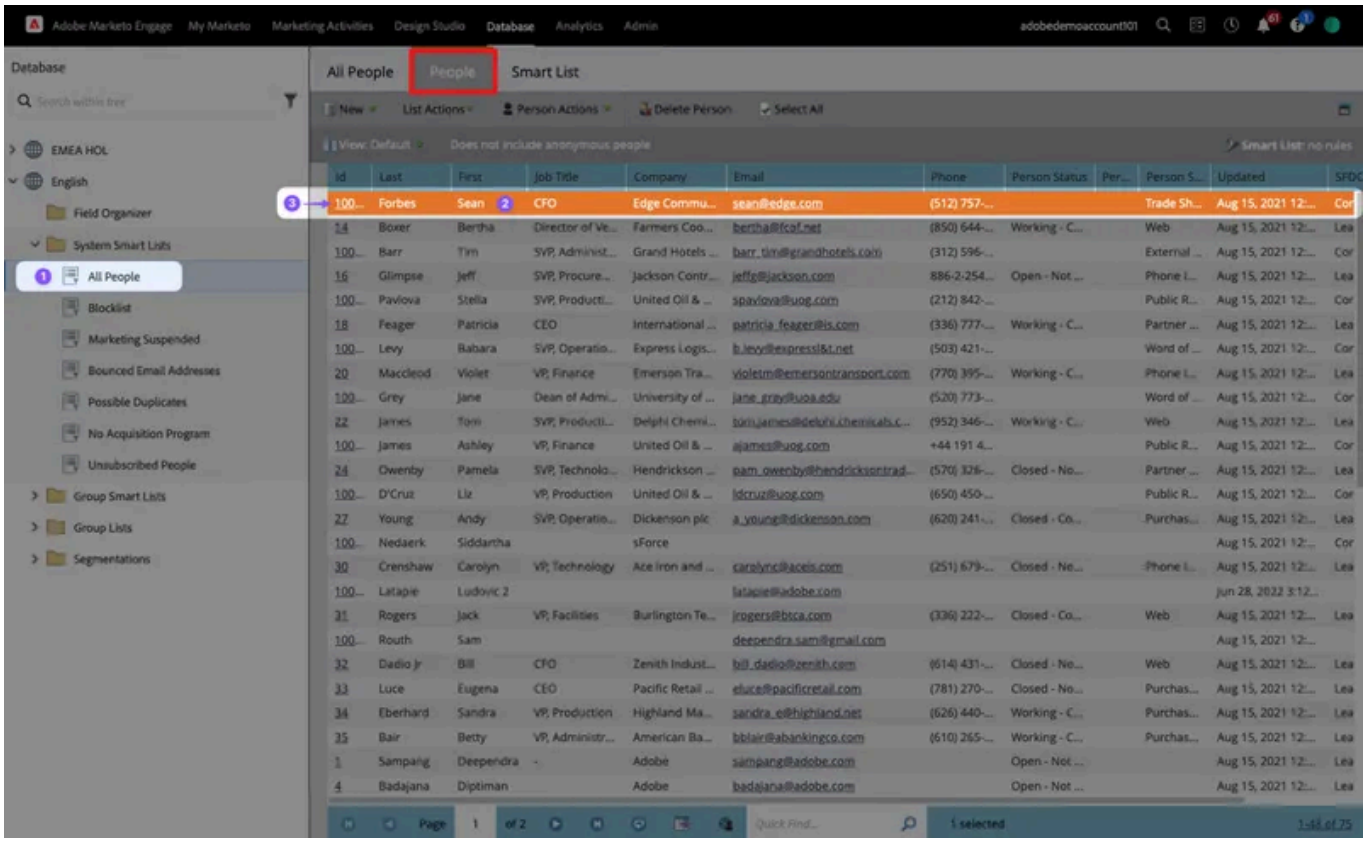
To understand and manage user profiles and activity logs within Marketo.

Please follow the steps below:

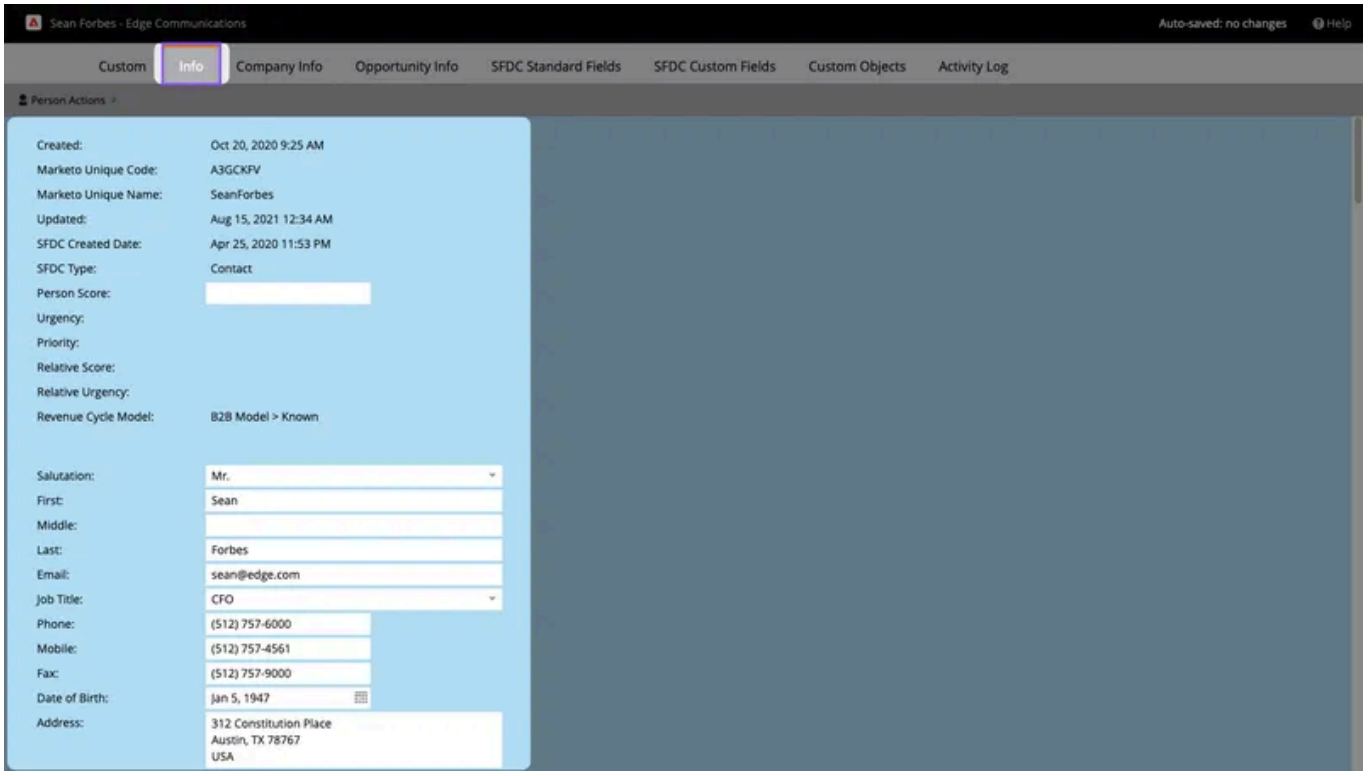
1. Select **Database** from the top bar navigation menu



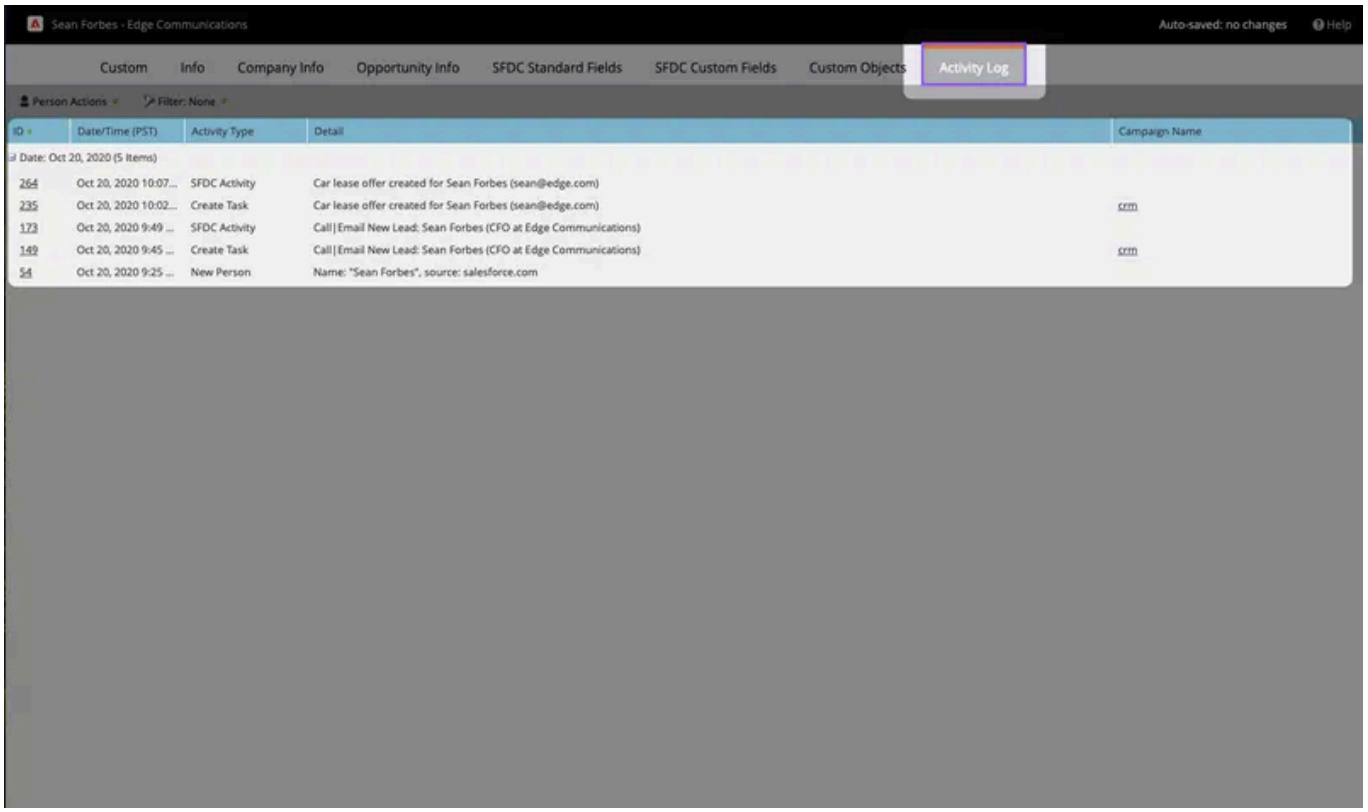
2. Select **All People, People** (highlighted in Red) tab, and select a profile from the list on the right, and select the ID of any profile



3. Select the **Info** tab within the profile



4. Select the **Activity Log** tab within the profile



Go to List Upload exercise

3.3.2. List Upload

Objective:

To master the process of uploading and managing lists in Marketo.

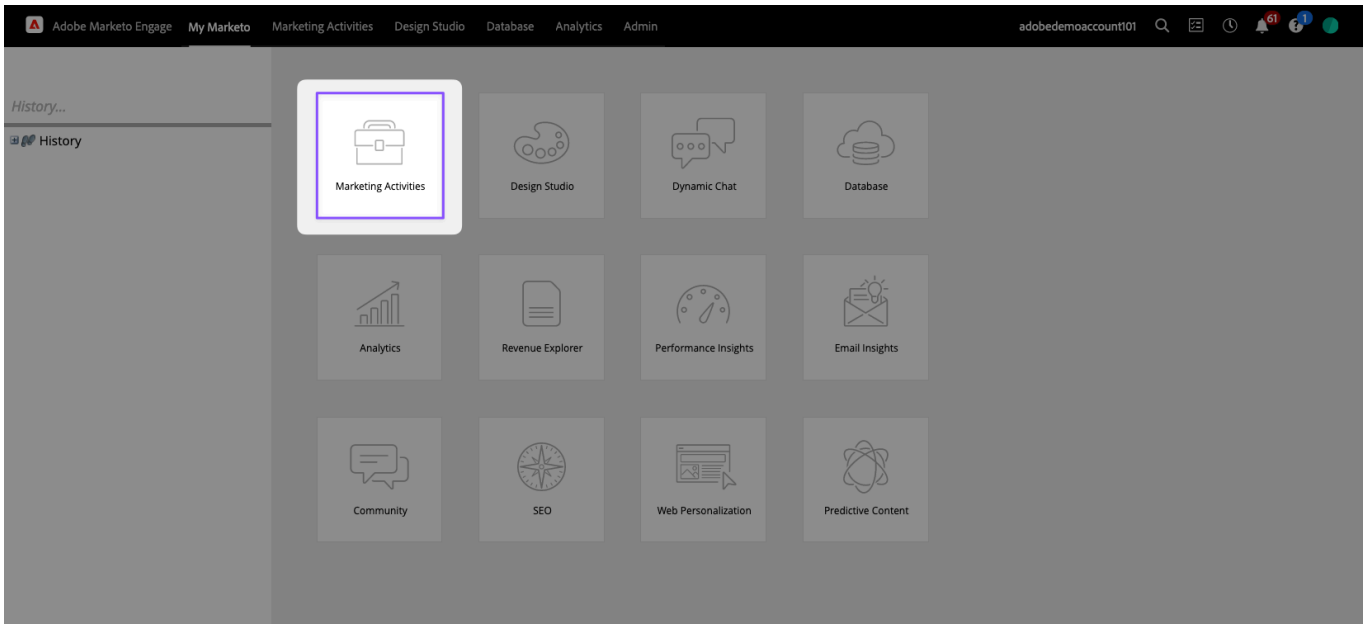
Note: You have to download the CSV file and save it on your system before proceeding to next steps. The file will be provided during the HOL session.

CSV File

HOL-Marketo-sample-profile-YY_with_ra...

Create a list

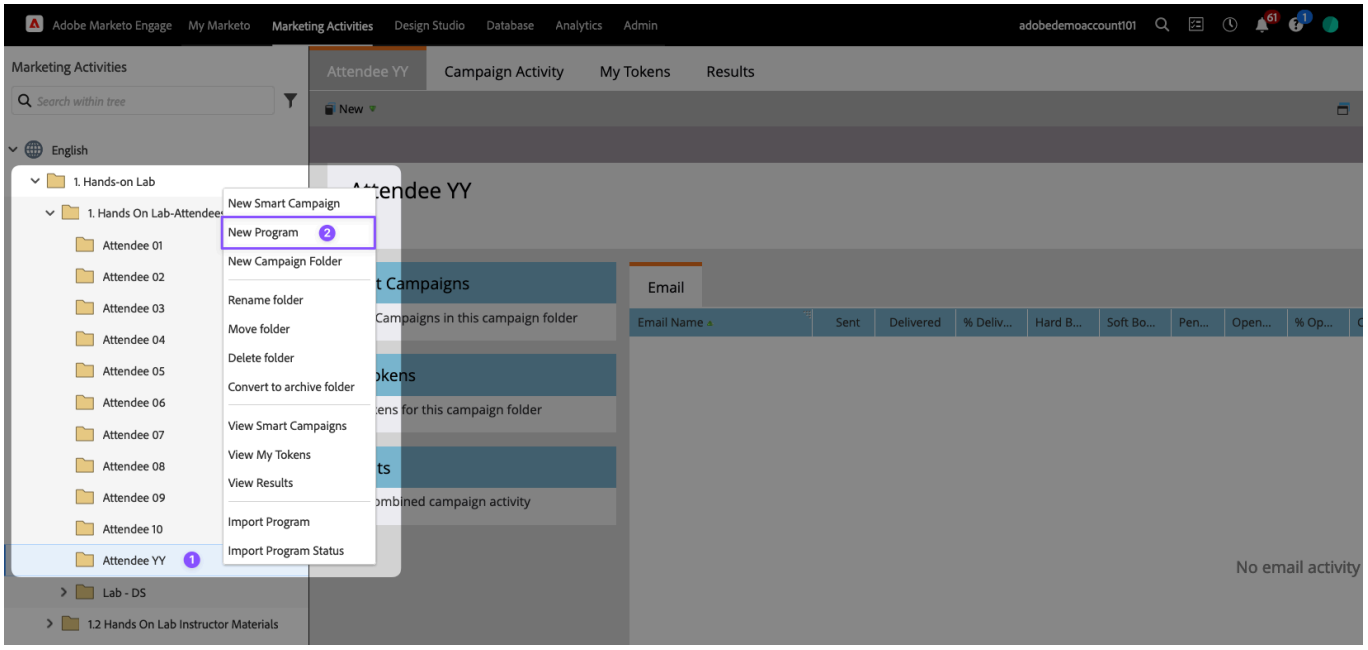
1. Navigate to **Marketing Activities**



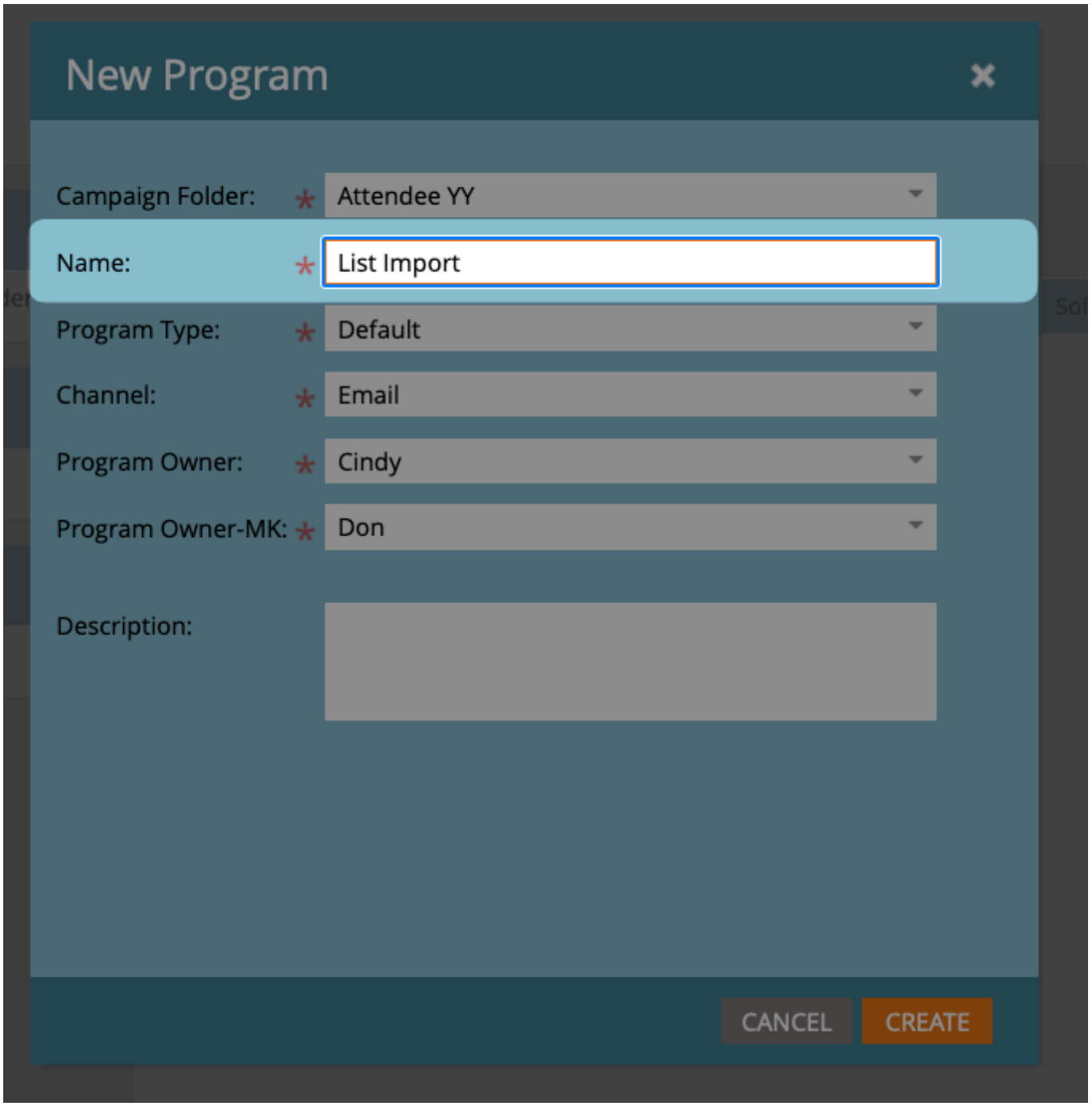
2. Go to your respective folder (details below) under **Hands-on Lab Attendee**

Attendee Folder #	First Name	Last Name	Email
01	Caitlin	Clements	caitlin.clements@barclays.com
02	Amy	Mignosi	amy.mignosi@barclays.com
03	Danian	Martinez	danian.martinez@barclays.com
04	Emilie	Uzan	Emilie.Uzan@barclays.com
05	Kari	Herrig	kari.herrig@barclays.com
06	Mercedes	Elguezabal	mercedes.elguezabal@barclays.com
07	Robin	Mather	rob.mather@barclays.com
08	Ronald	Lofrese	ronald.lofrese@barclays.com
09	Amy	Arifin	amy.arifin@barclays.com
10	Nadia	Sheikh	nadia.sheikh@barclays.com
11	Kevin	Evans	kevans@adobe.com
12	Nirmal Barclays	test	nirmalj+bc1712@adobetest.com
13	Paul	Schofield	pschofield@adobe.com

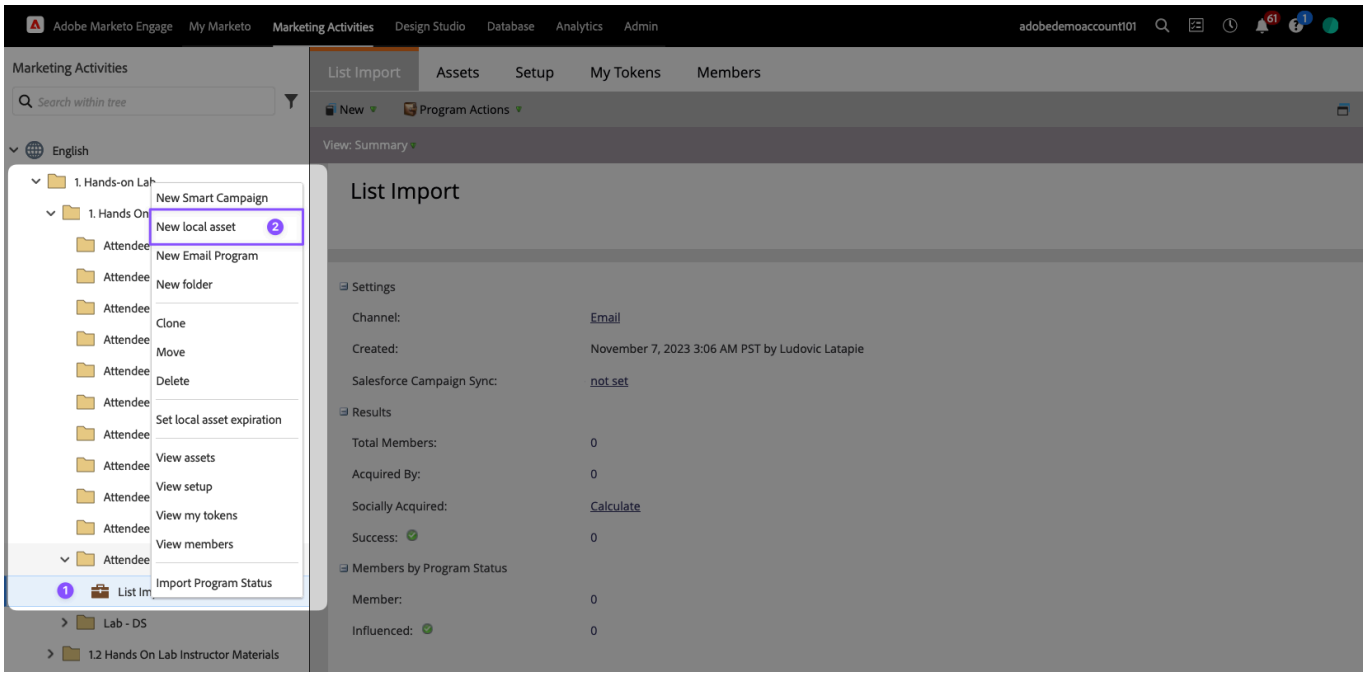
Right-click and select **New Program**



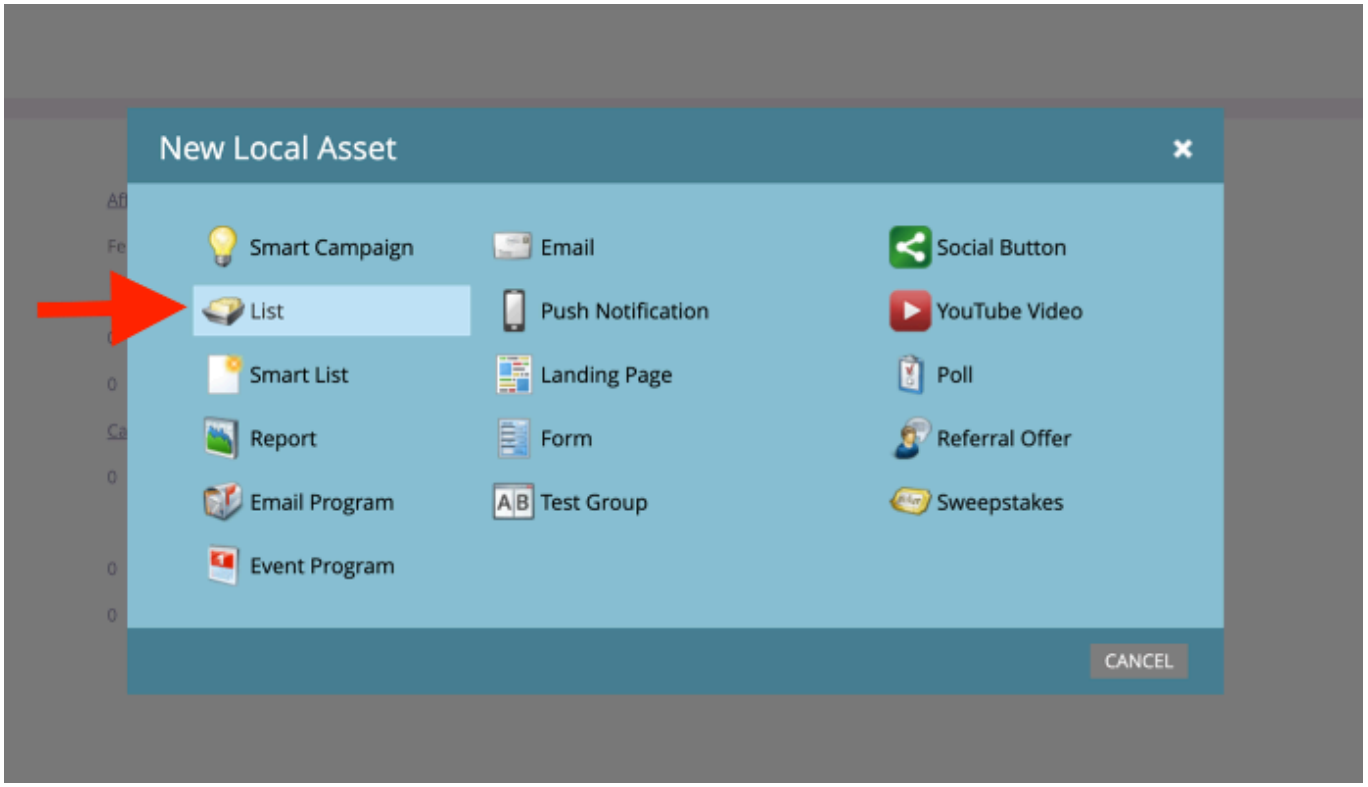
3. Name the new program “List Import-##” (replace ## with your attendee number e.g. “01”), Program type as **default** and click **Create**



4. Right-click on the newly created program and select **New local asset**



Choose **List** from the options

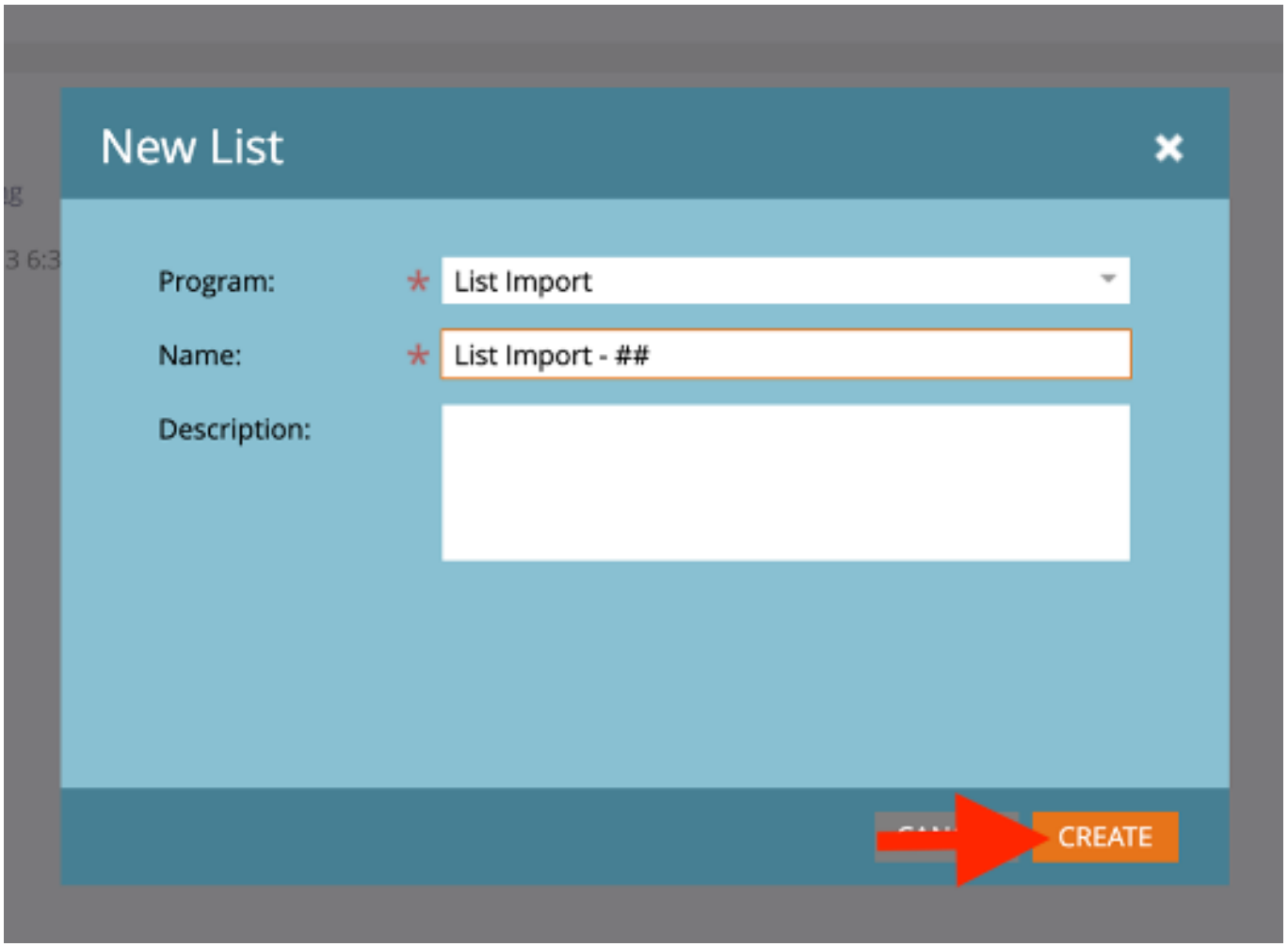


Name the list “List Import - ##”

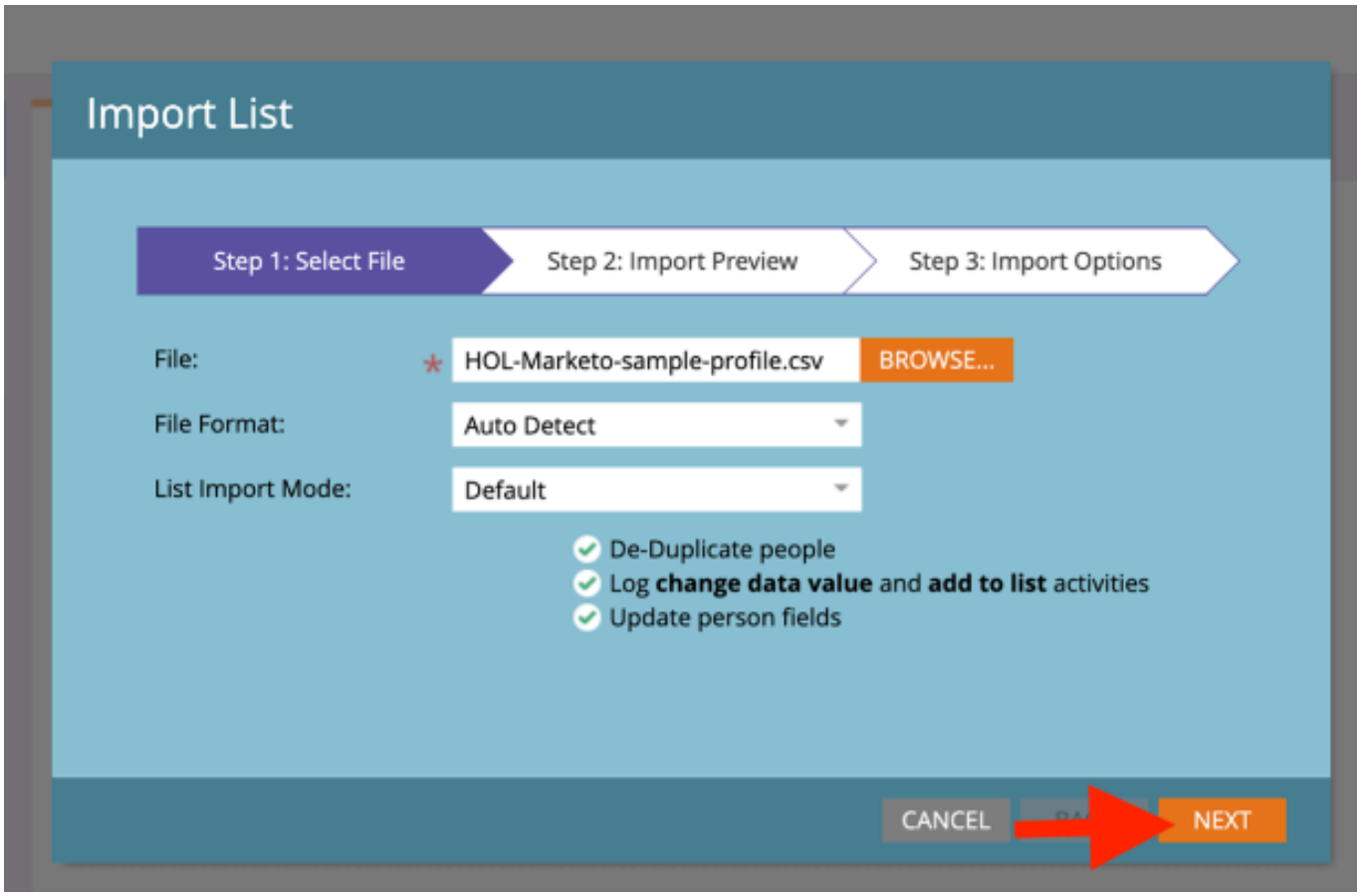
Note: replace ## with your attendee number e.g. “01”

Import file to the list

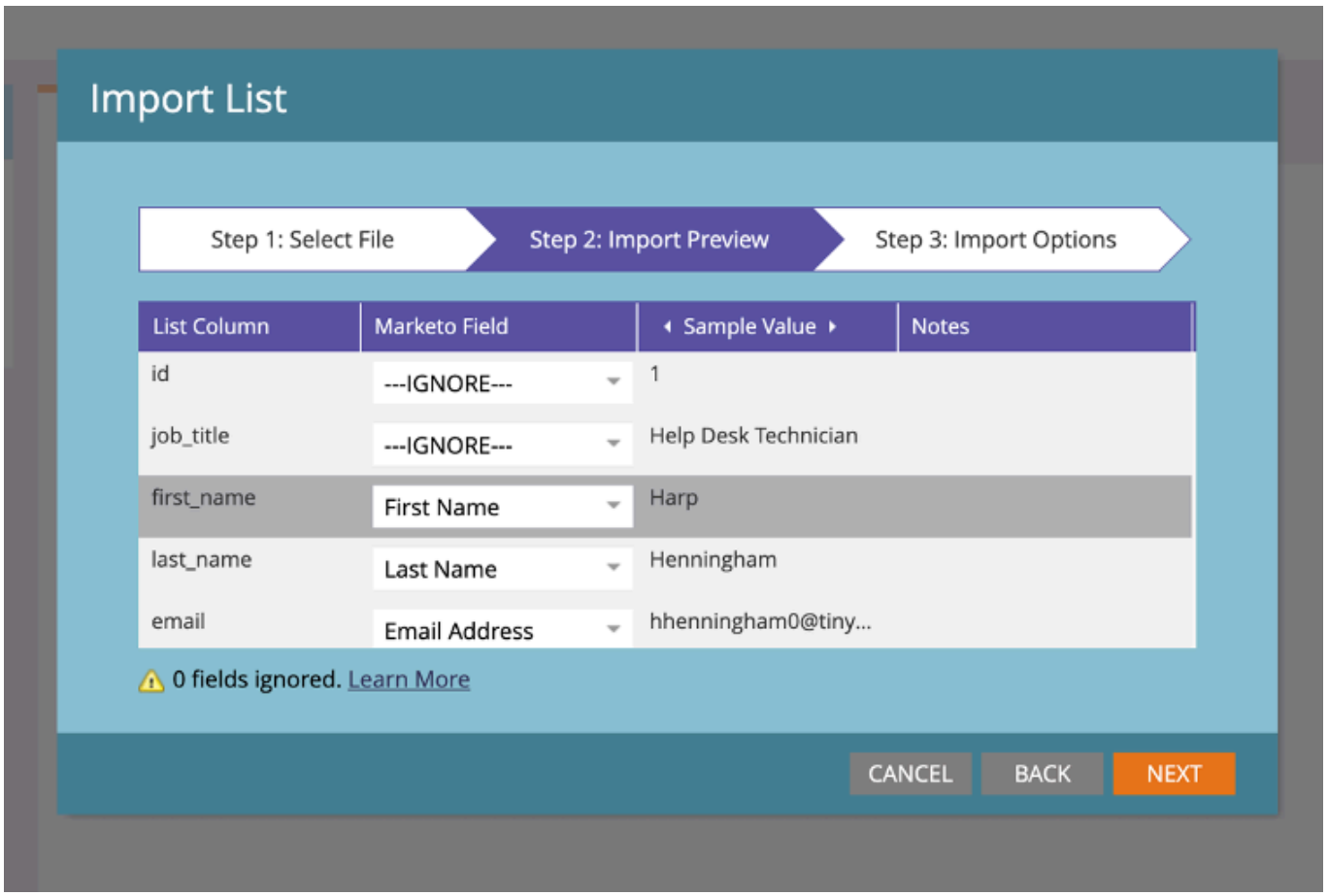
1. Right-click on the list “List Import - ##”



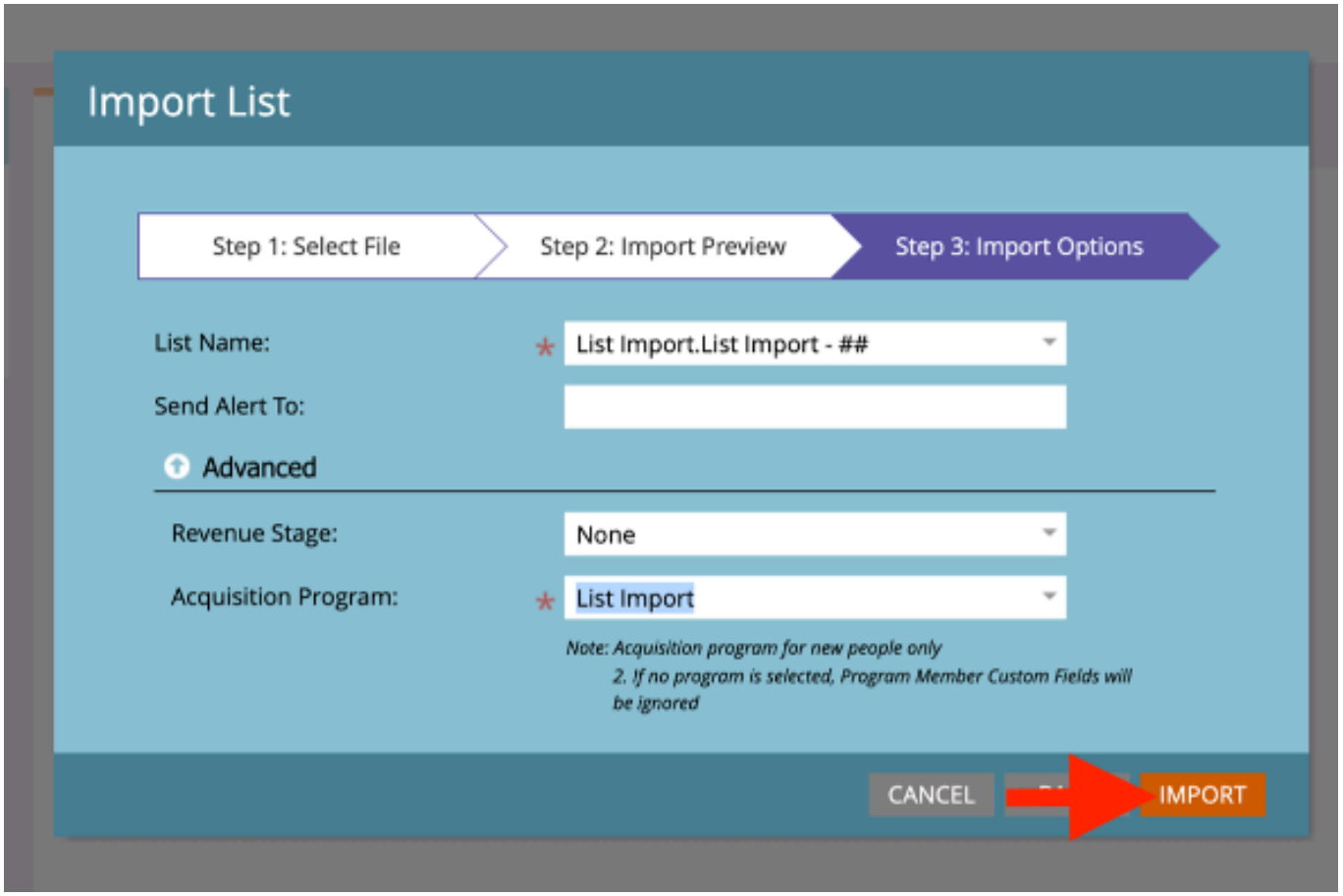
2. Browse and choose the CSV file from your file system e.g. profile-sample-01 and click next.



3. Now map the fields, in this case, mapped by default so go next.



4. Select your acquisition program "List import-##" and click **Import**



The List will start getting uploaded.

Go to Campaign and Assets module

3.4. campaign-and-assets

3.4.1. Campaign and Assets

Overview

Welcome to the "Campaign & Assets" module of the Marketo Hands-On Lab.

This module is specifically tailored for individuals aiming to master the creation, management, and optimization of email campaigns and assets in Marketo. It is an essential resource for marketing professionals, email campaign managers, and digital marketers who want to leverage Marketo's capabilities for effective email marketing.

What You Will Learn:

1. **Email Program Development:** Explore the steps to construct a comprehensive email program in Marketo. Gain insights into planning, execution, and monitoring of email campaigns for maximum impact.
2. **Dynamic Email Creation:** Understand the fundamentals of building dynamic, responsive emails that cater to diverse audiences. Learn about personalization, design best practices, and content optimization.
3. **Program Cloning and Scoring Integration:** Discover efficient ways to replicate successful email programs and integrate scoring mechanisms. Learn how to use cloning to save time while maintaining quality and how scoring can enhance targeting and segmentation.

Exercises:

- **Exercise 1: Build an Email Program**
  - Get hands-on experience in setting up an email program from scratch, focusing on strategy, creation, and execution.
- **Exercise 2: Build a Dynamic Email**
  - Learn the art of crafting responsive and personalized emails that resonate with your audience.
- **Exercise 3: Clone Email Program with Scoring**
  - Explore how to duplicate successful email programs and integrate scoring to enhance targeting and effectiveness.

Target Audience:

This module is ideal for marketing professionals, email campaign managers, digital marketers, and anyone interested in mastering email marketing using Marketo.

Duration:

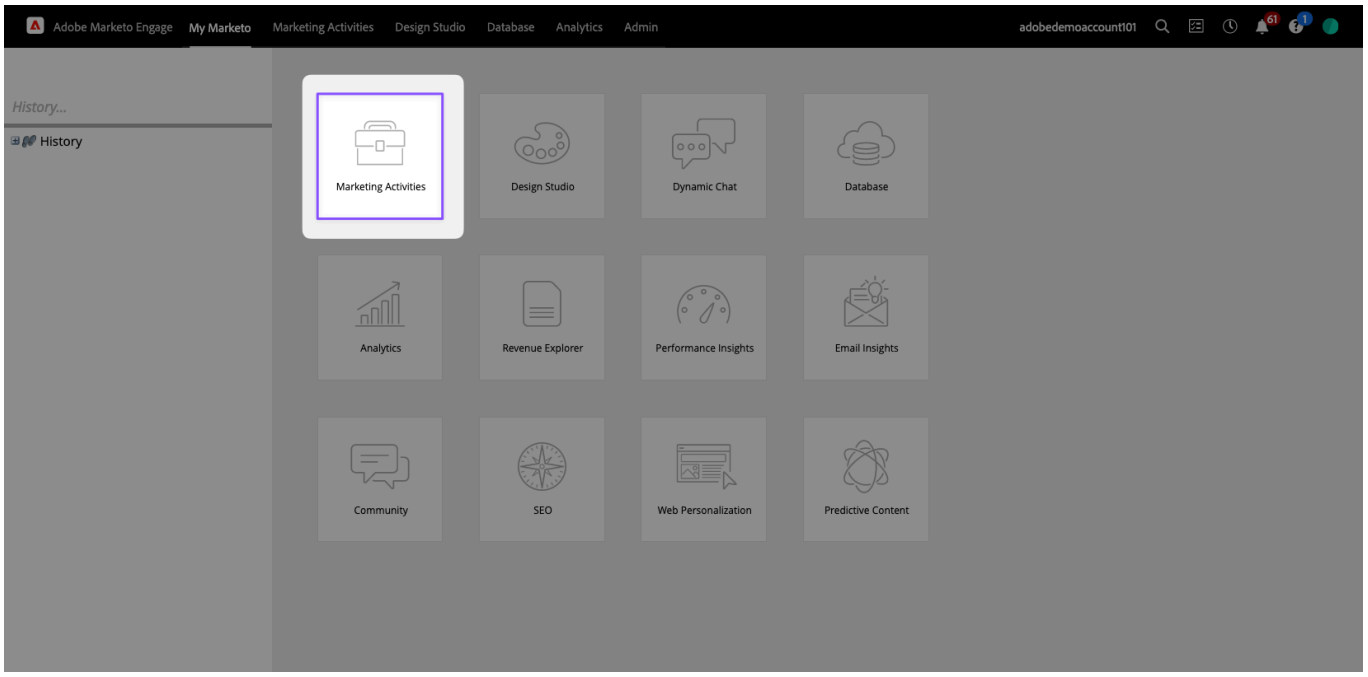
The estimated completion time is approximately 50 minutes.

Getting Started:

Begin your journey in the **Campaign & Assets** module by diving into the first exercise: **Build an Email Program**. Here, you will find comprehensive instructions and interactive tasks to develop your skills in email campaign creation and management.

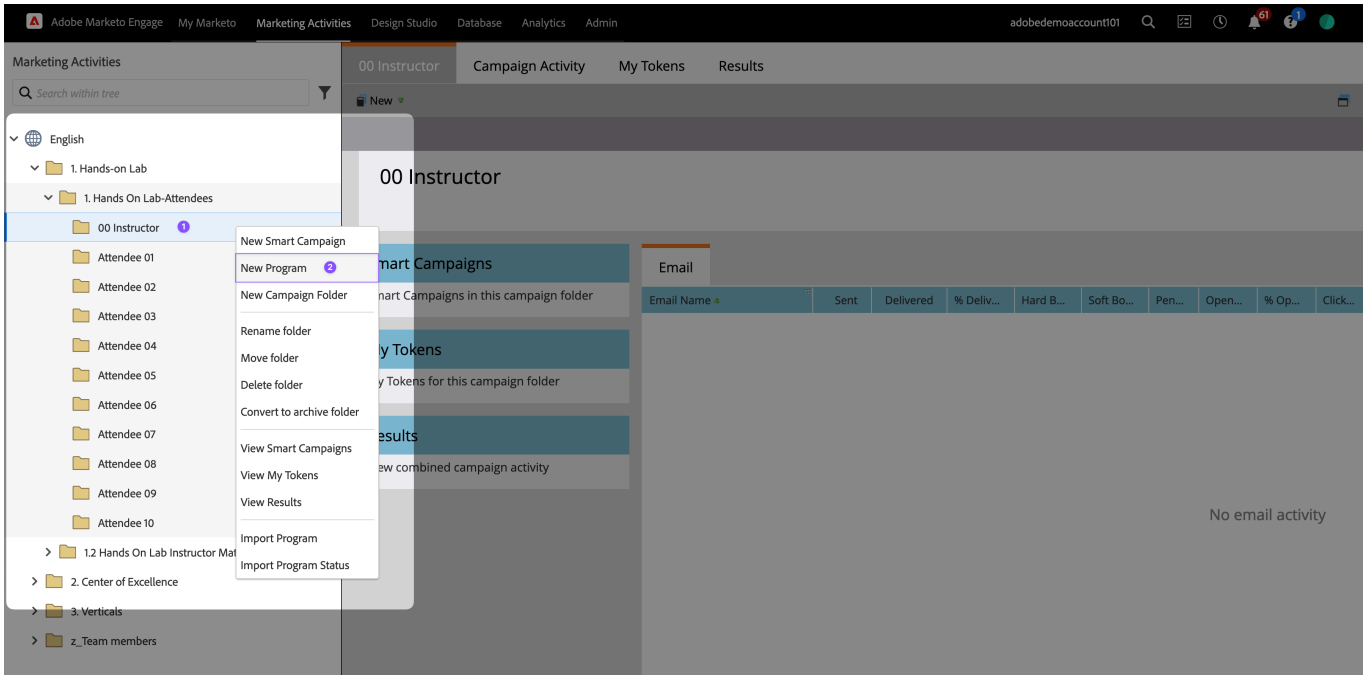
3.4.1.1. Build an Email Program

1. Navigate to **Marketing Activities**

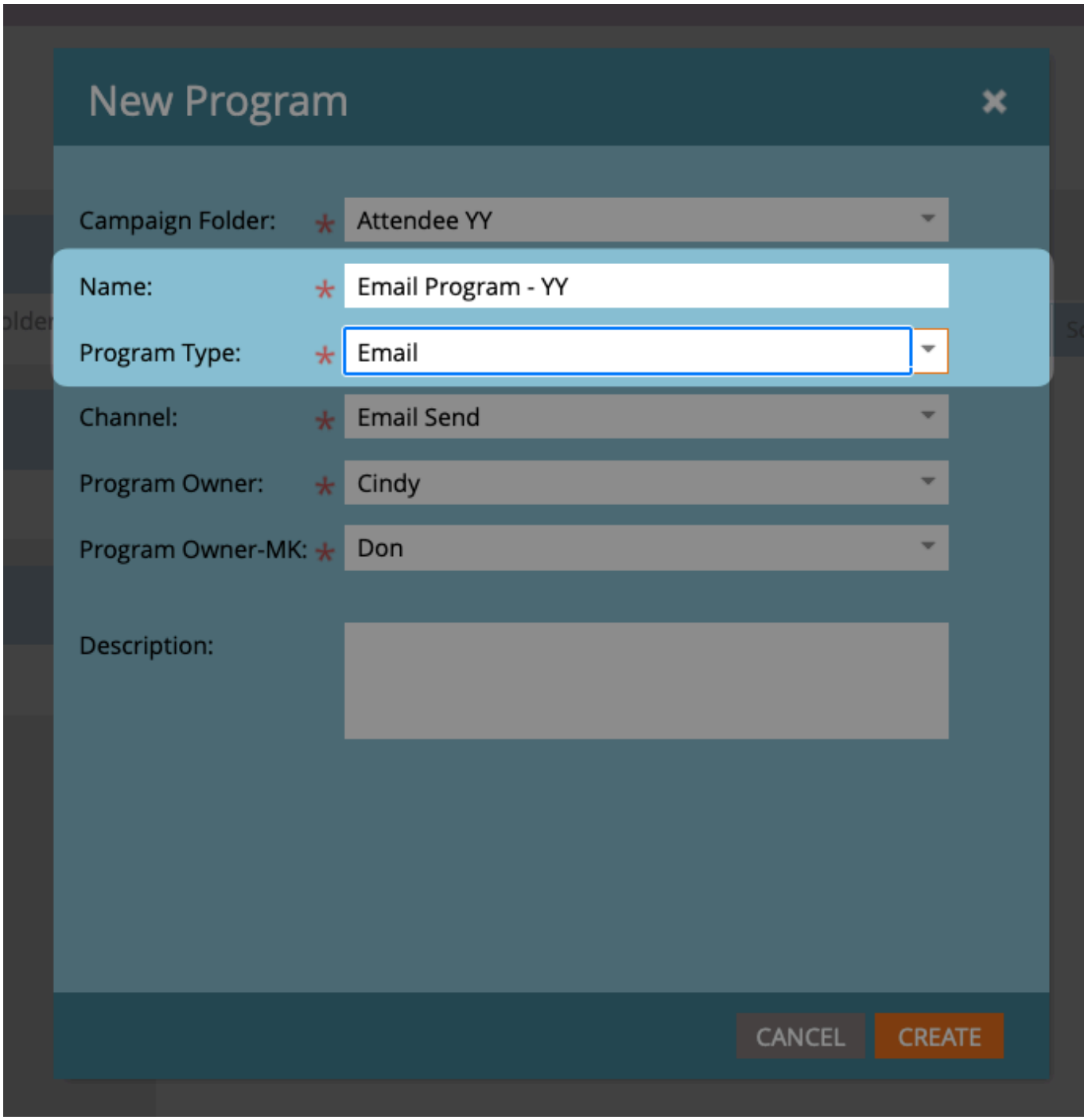


2. Go to your respective folder under **Hands-on Lab Attendee**

Right-click and select **New Program**



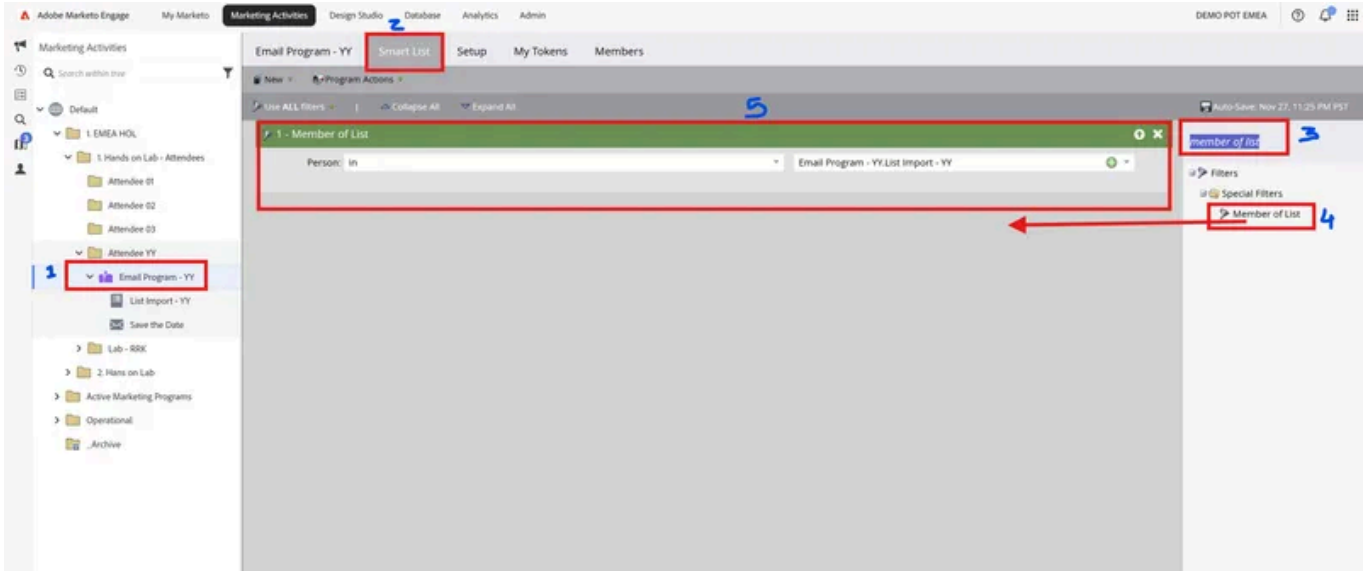
3. Name the new program “Email Program - ##” (**Note**: replace ## with your attendee number e.g. “01”), Program type as **Email** and click **Create**



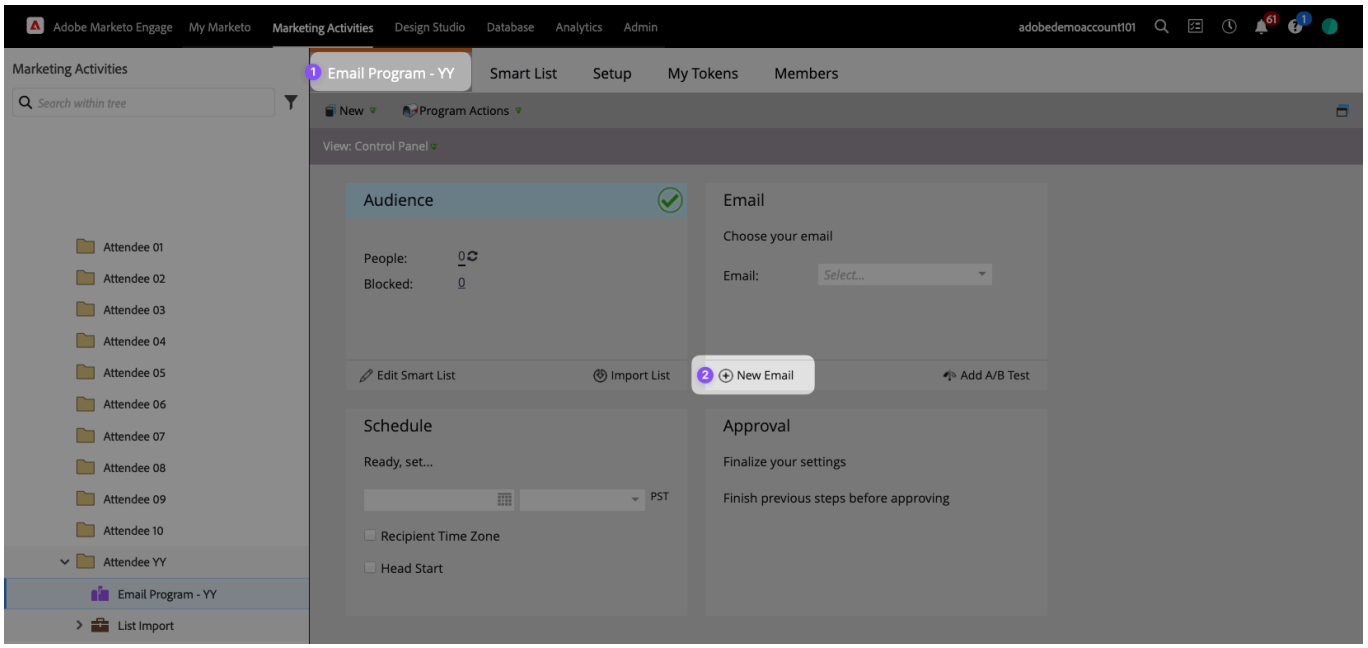
4. Navigate to the newly created email program and then to the smart list.

Type member of list, select the filter, drag and drop (as shown with the arrow). Select the list by typing your program name and choosing it from the drop-down menu.

Note: This is the same list created in the previous activity under the List Upload section.

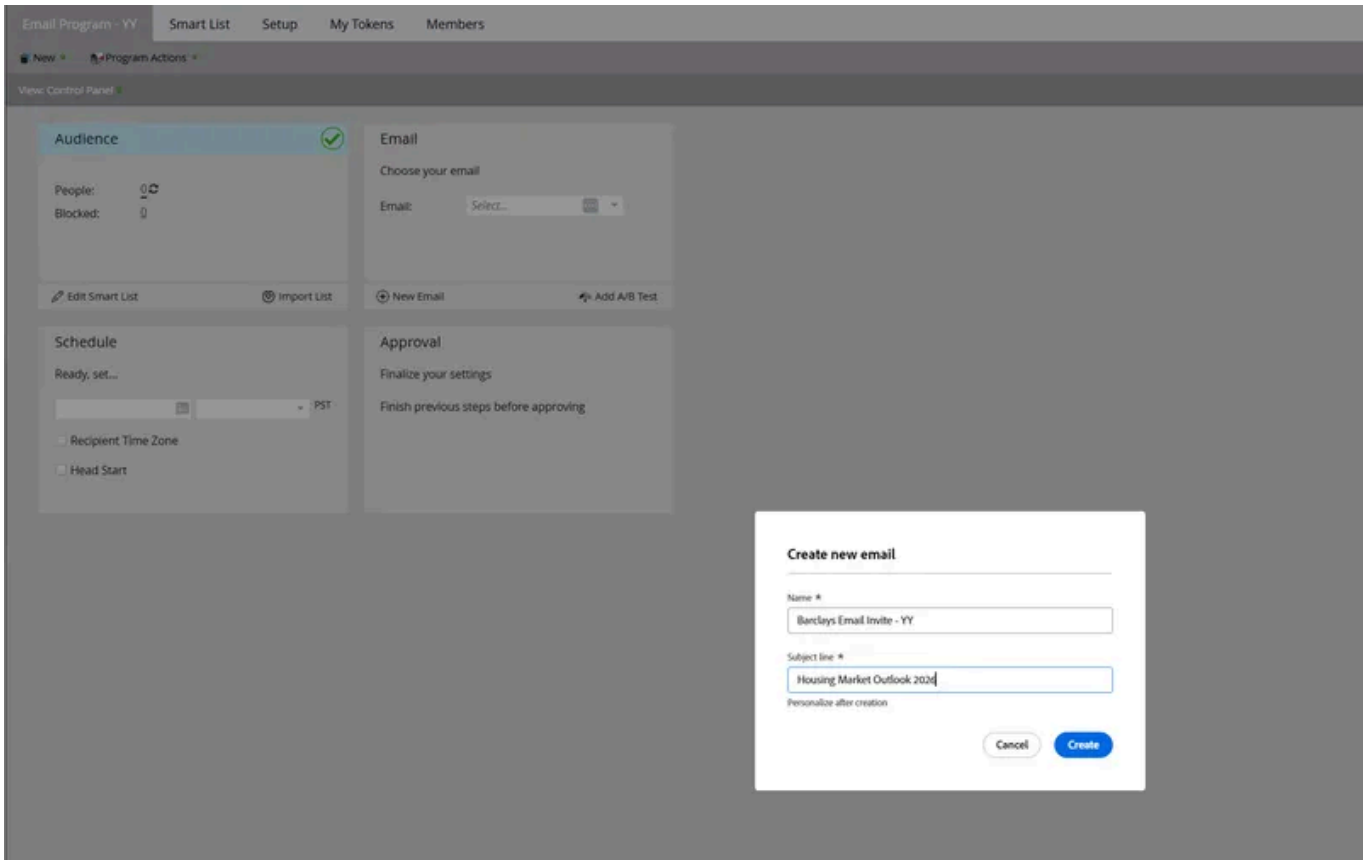


Go to the **Email Program - ##** tab, click on **New Email, Email (New Email Designer)** when prompted.

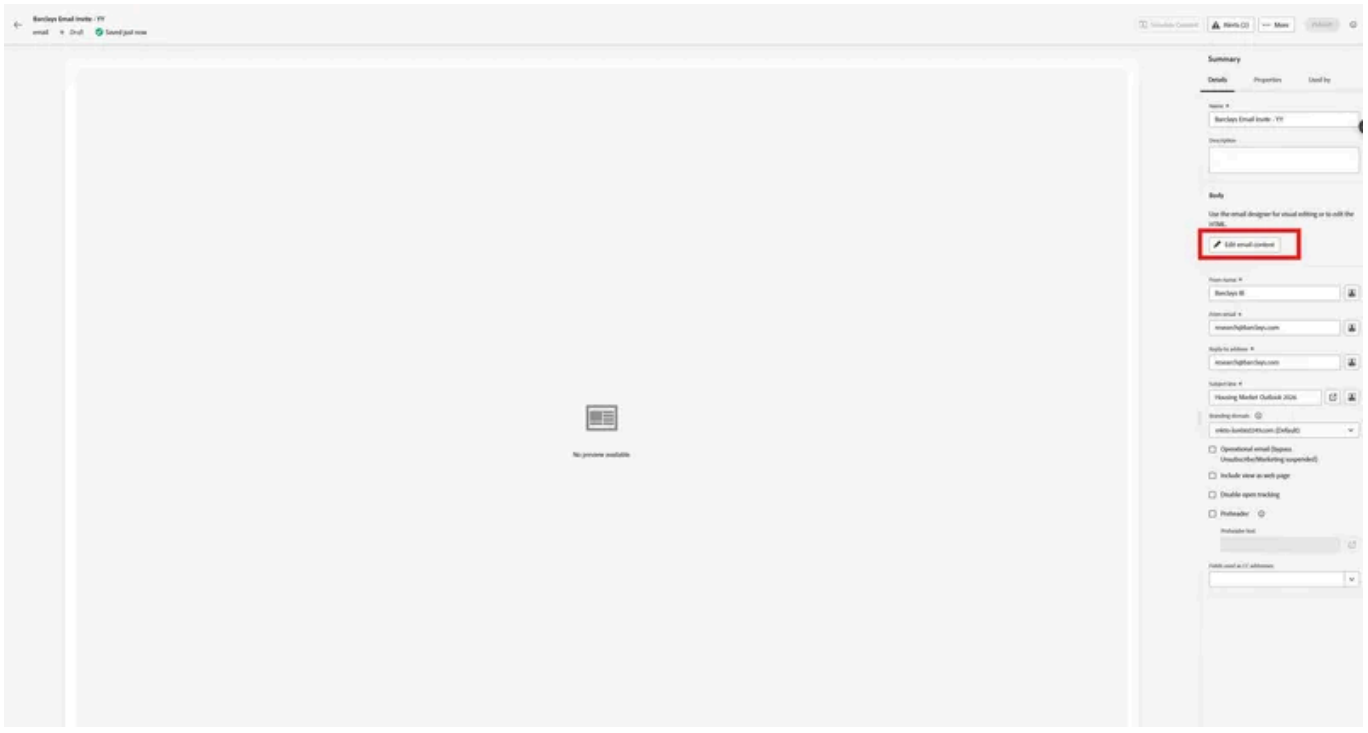


Provide Name (Barclays Email Invite - ##). Provide Subject line (Housing Market Outlook 2026)

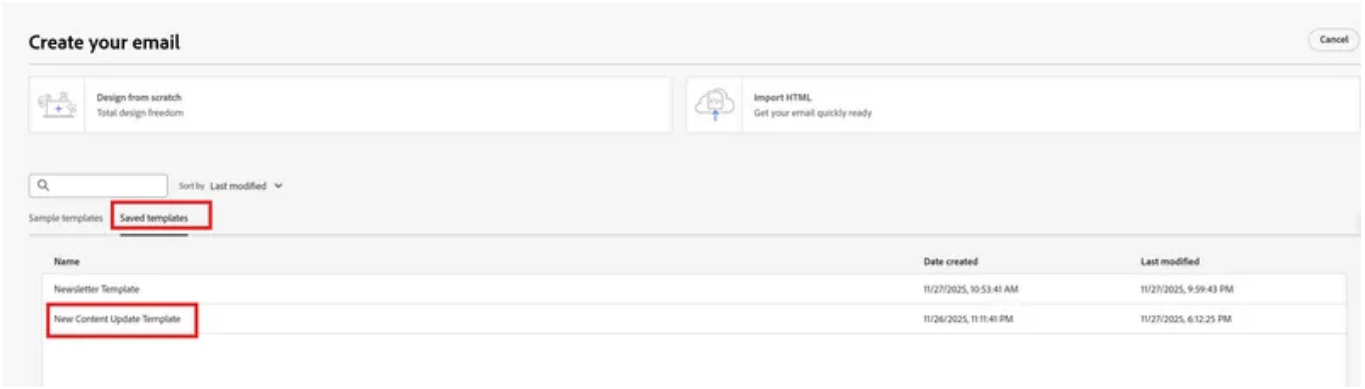
Note: replace ## with your attendee number e.g. “01”



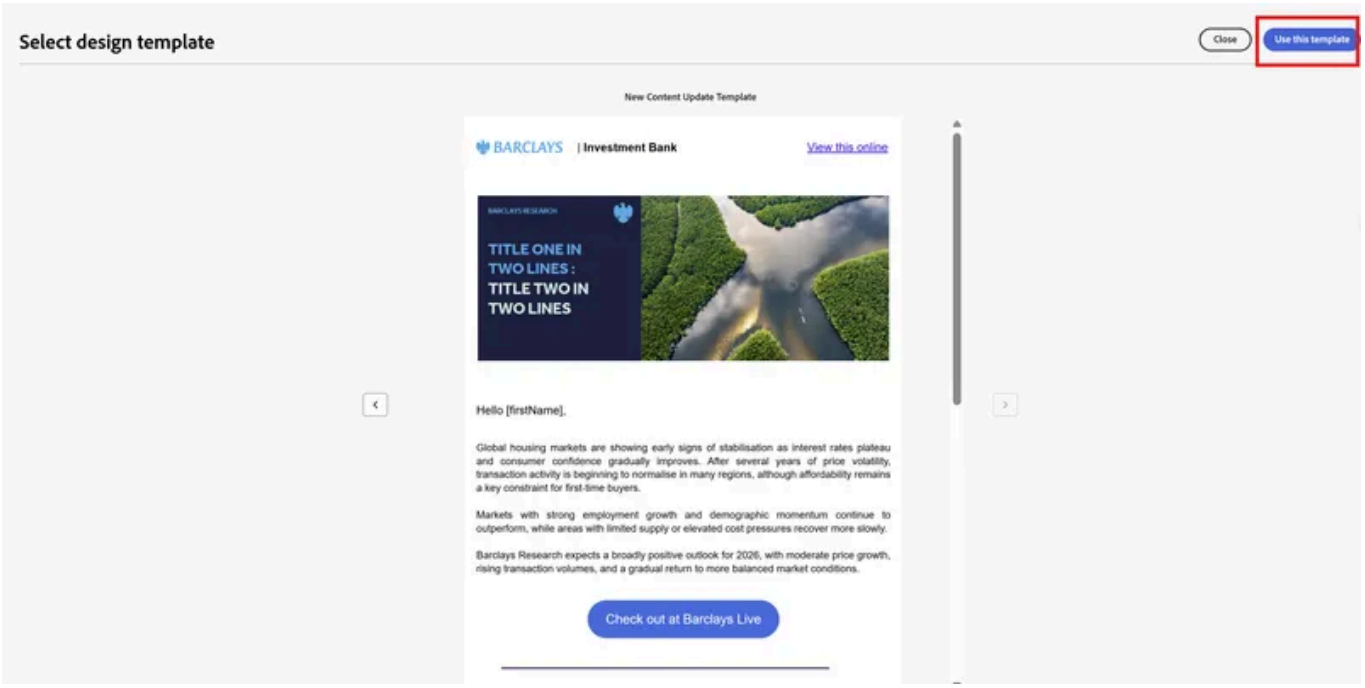
Click on Edit email content



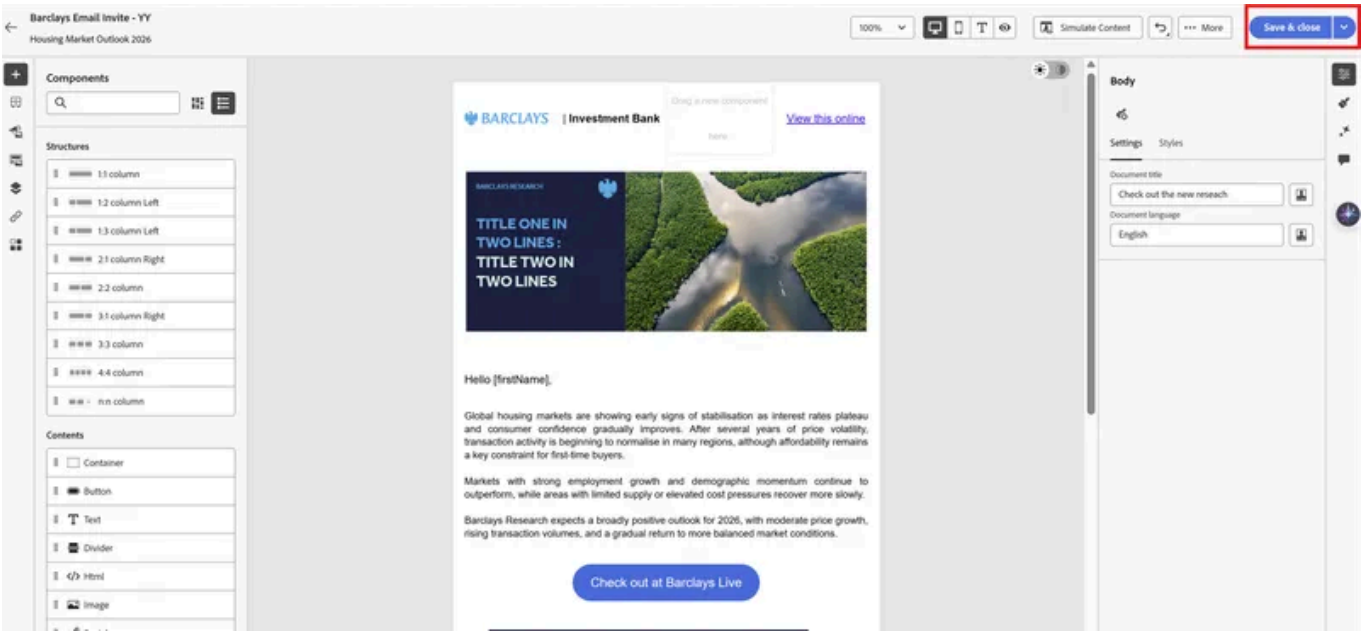
Click on **Saved templates** and select **New Content Update Template**



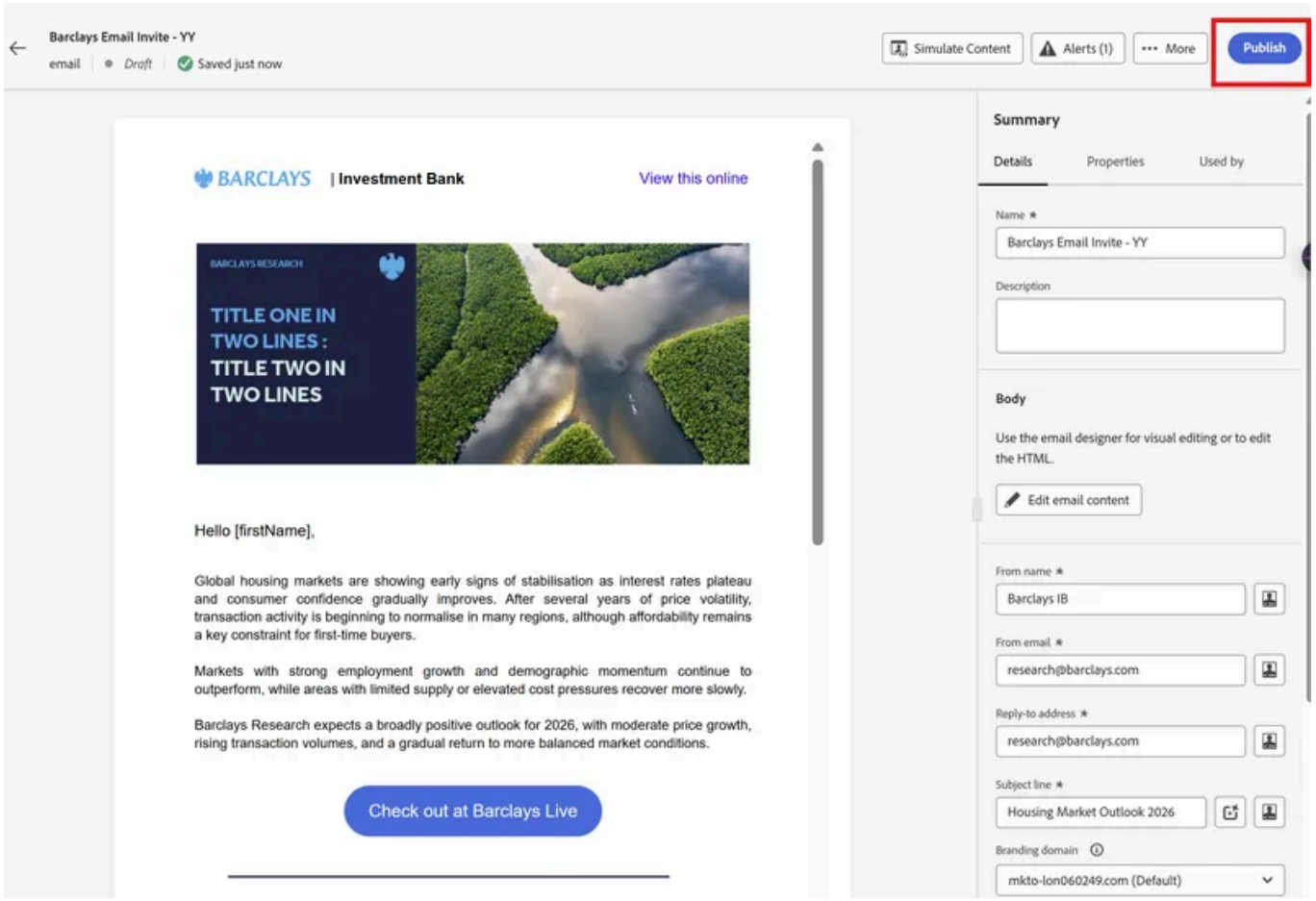
Click on **Use this Template**



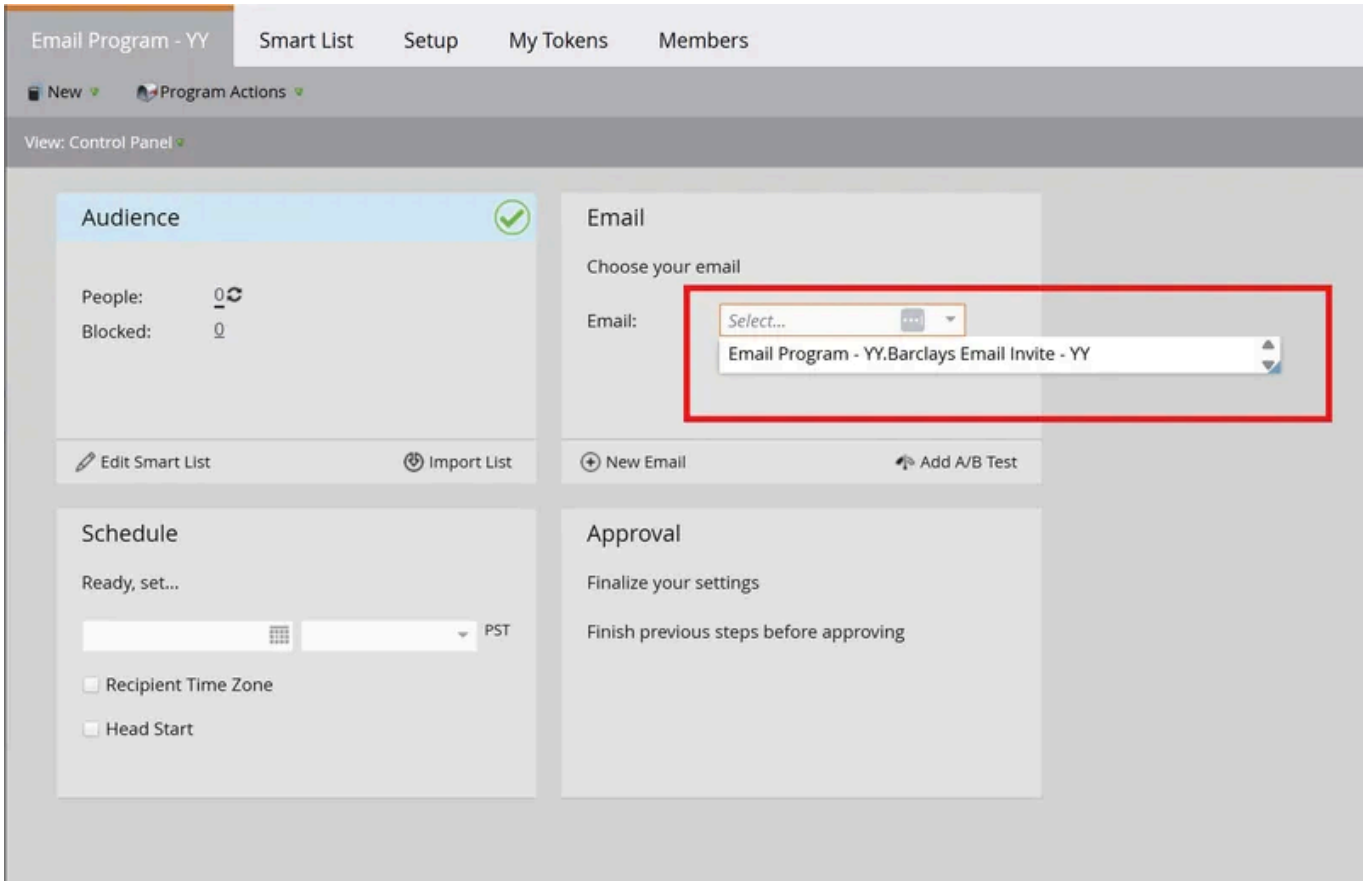
Click **Save & close**



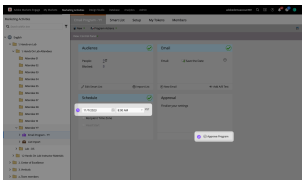
Click on **Publish**



Click on your Email program and select the email we just created and published.

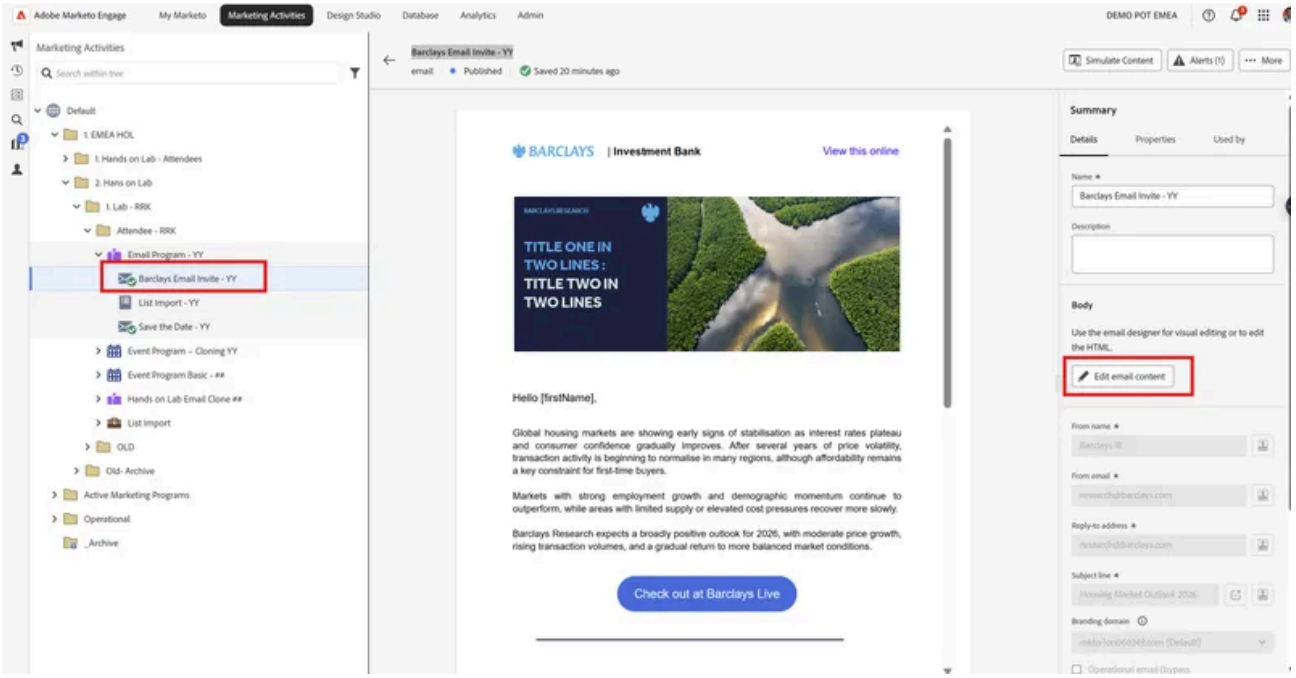


Select the date and time for the deployment, Schedule and Approve Program

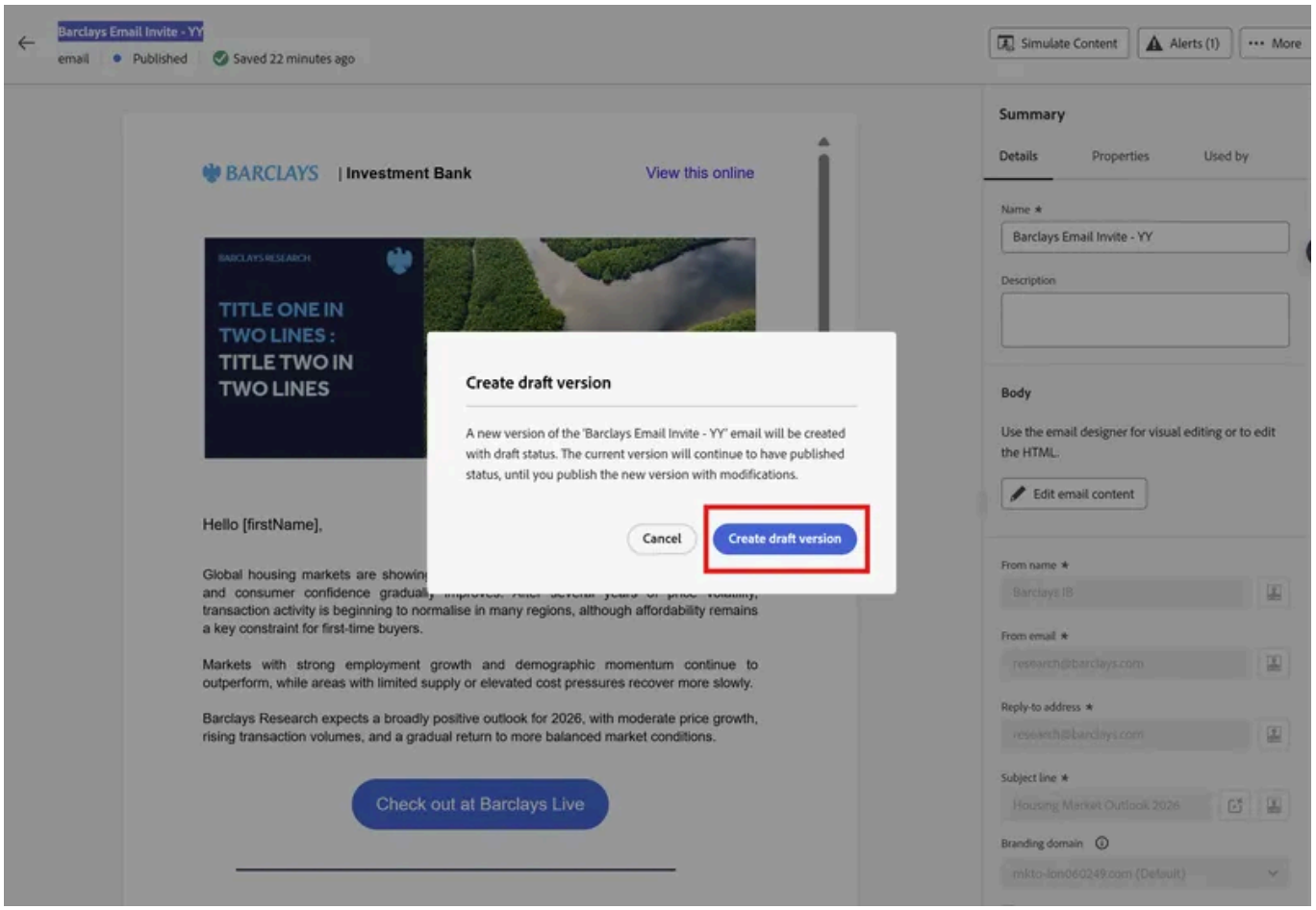


3.4.1.2. Build a Dynamic Email

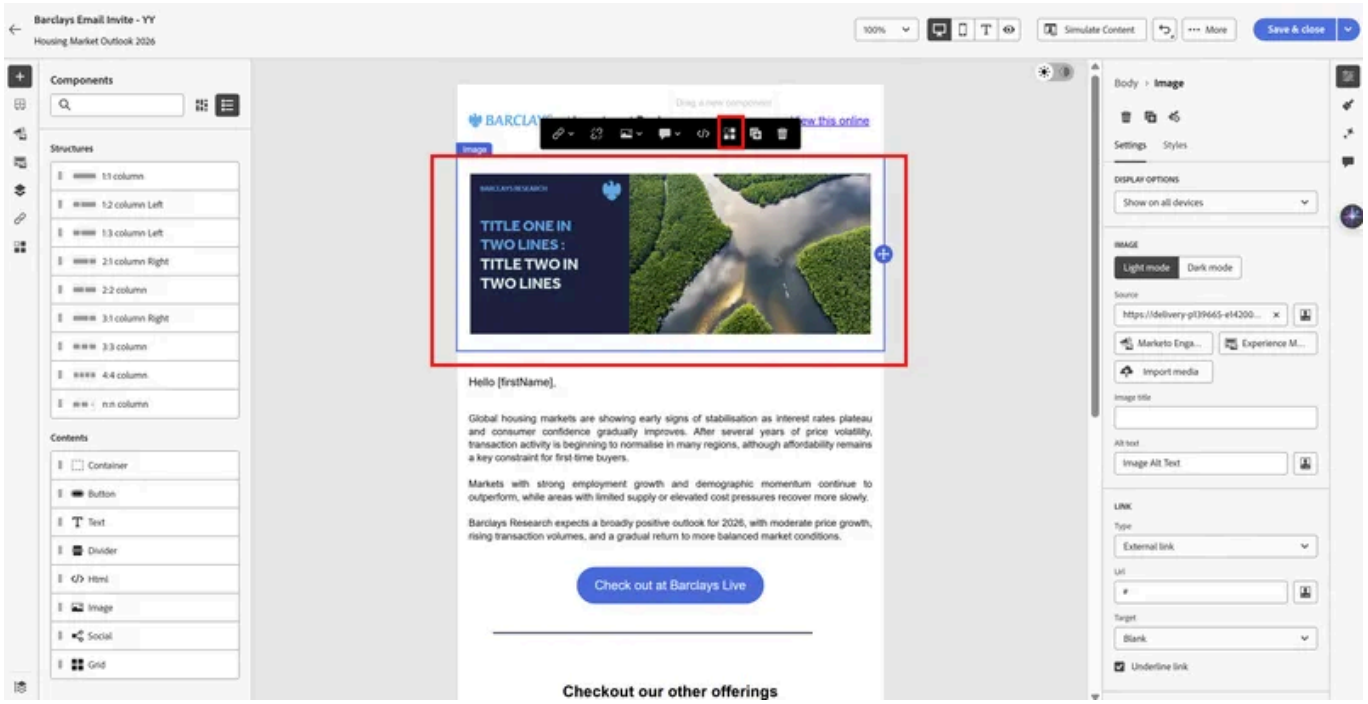
1. Select **Barclays Email Invite - ##** email (in your respective folder) from the Navigation tree on the left
2. Click **Edit email content,** click **Create draft version**



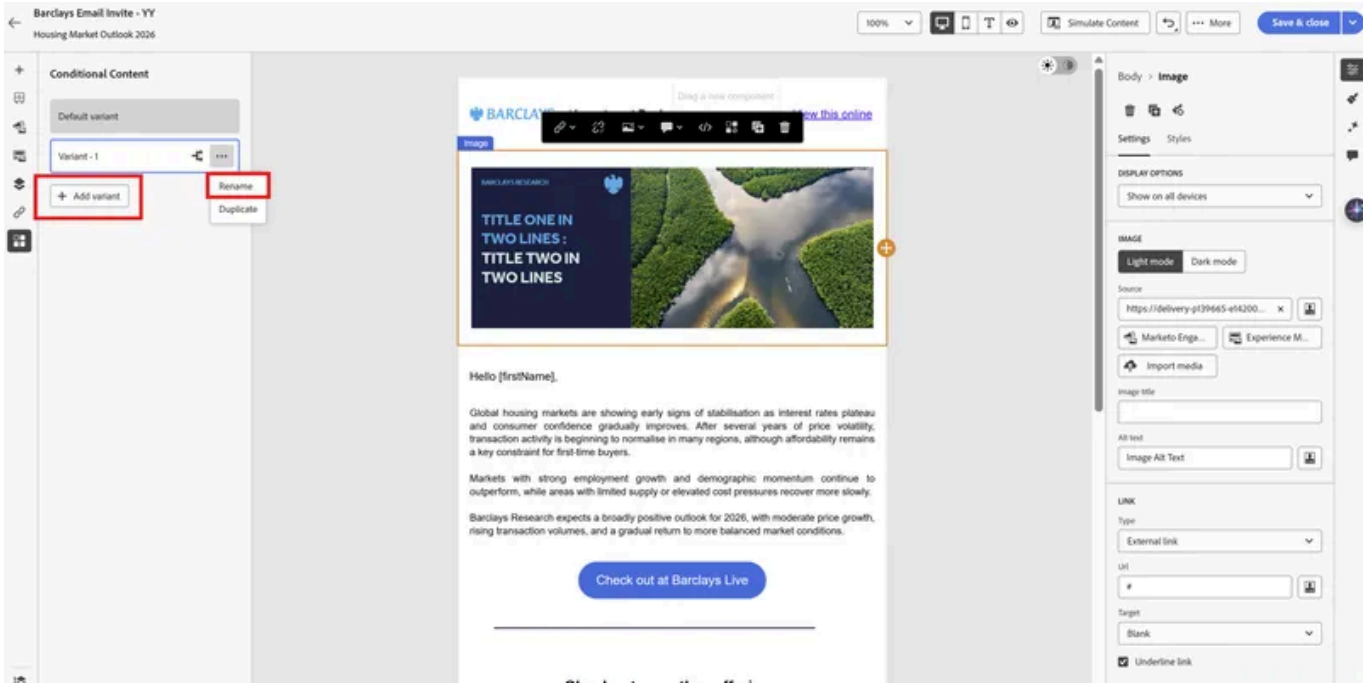
Click on **Create draft version**



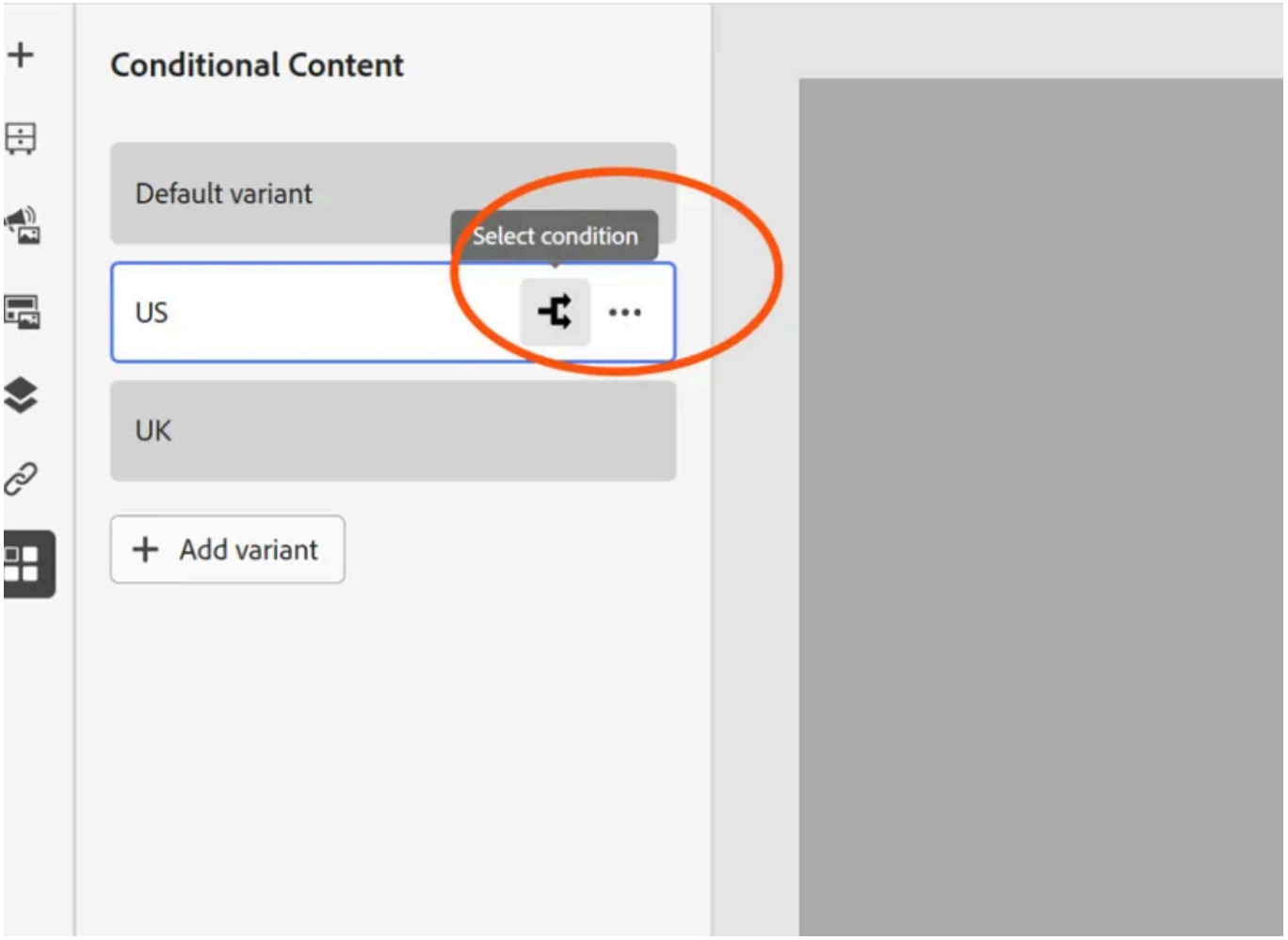
3. In the email editor, select the banner image, and click on **Conditional content**



4. Click Add variant and rename them for the US and UK

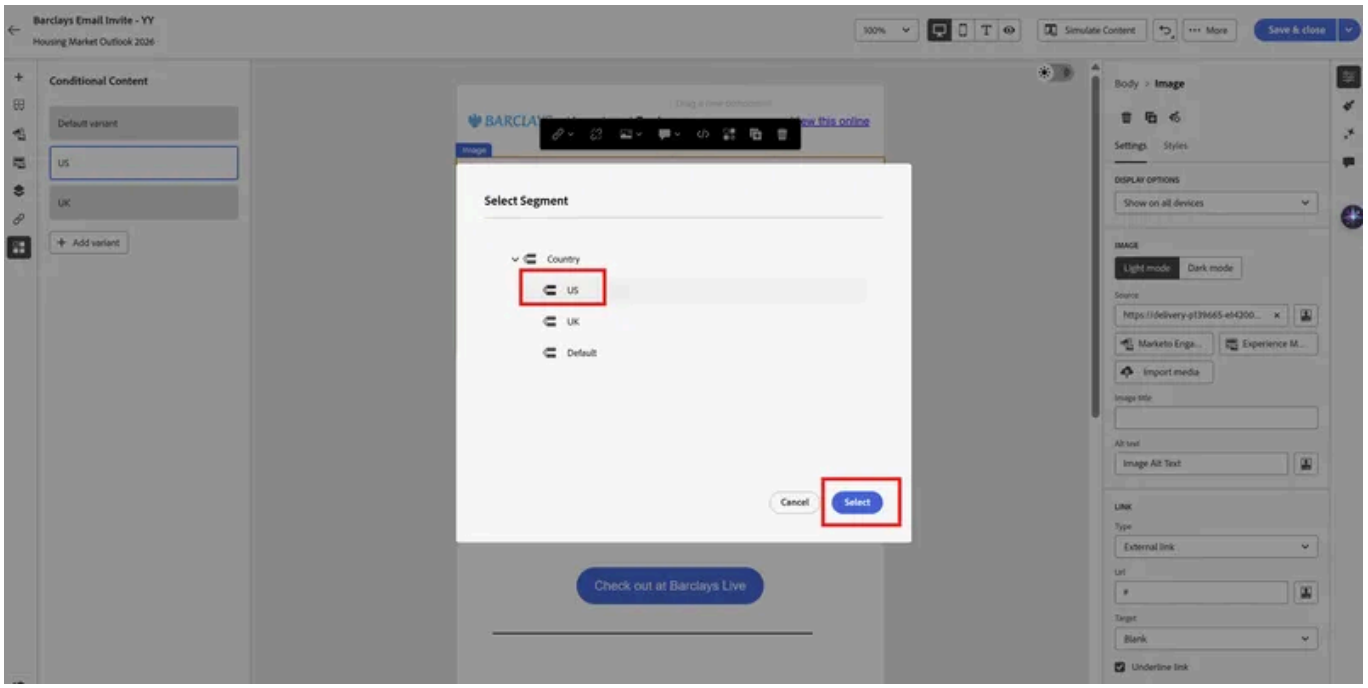


Click on **Select condition** for US

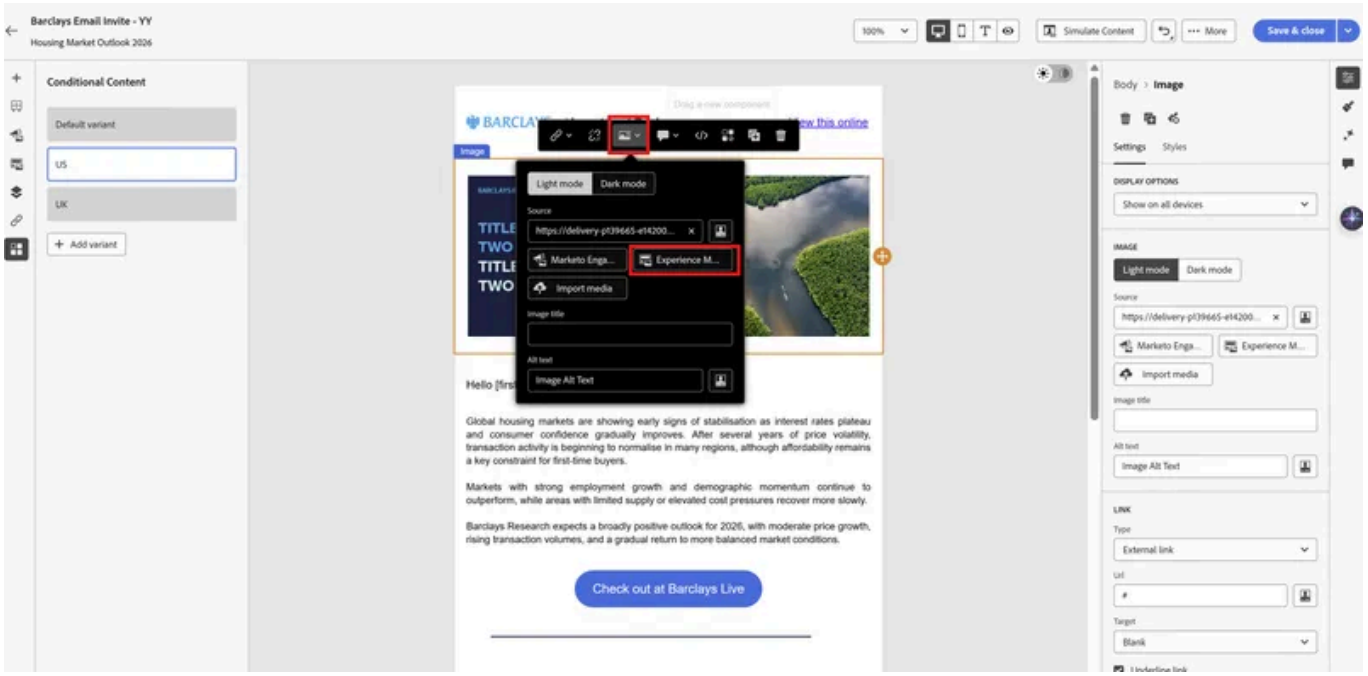


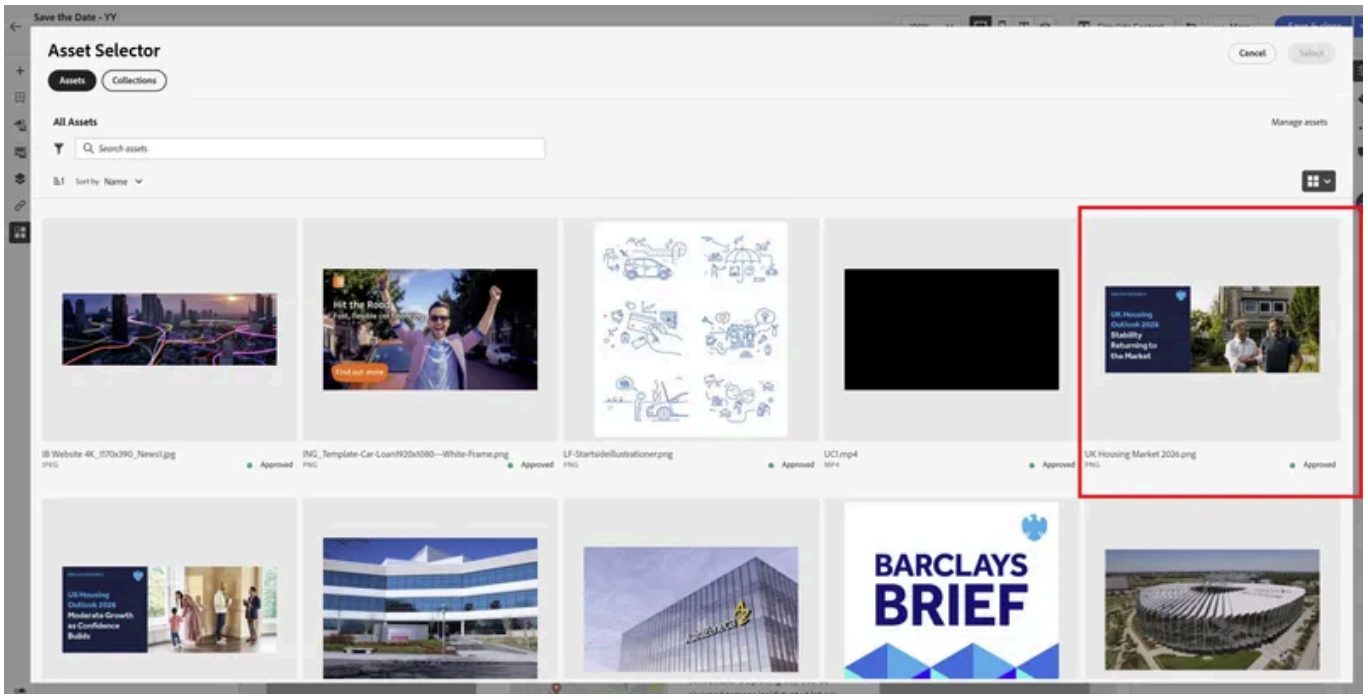
Select the US segment

Note: Segments can be built in database based on profile attributes (like Country, Product interest (Banking/Housing etc.)). Segments are already created in the database for this exercise.



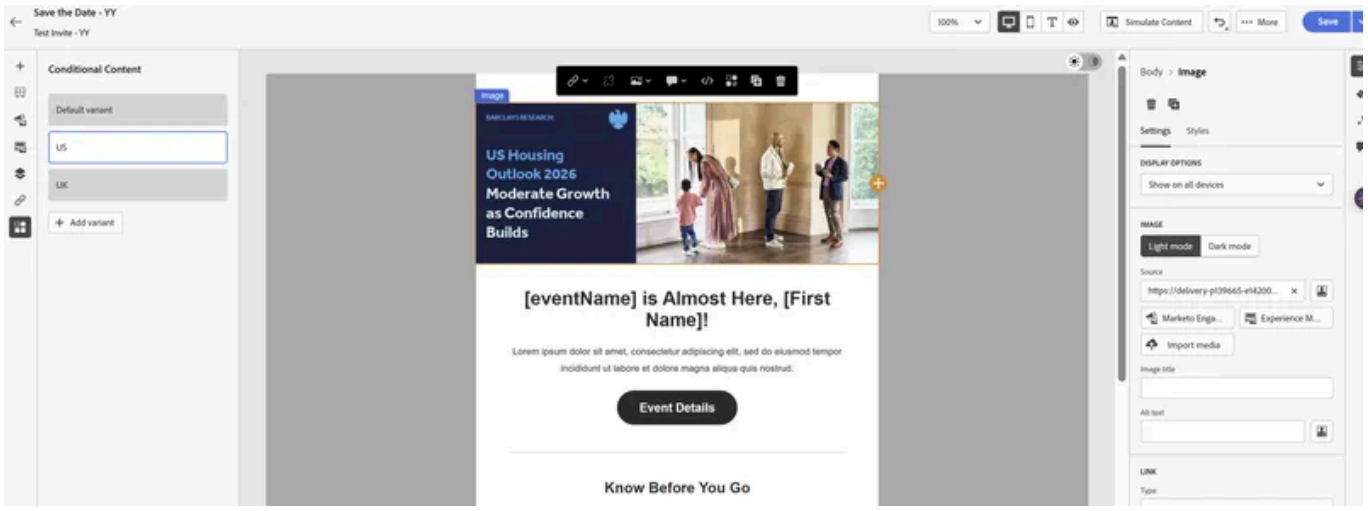
Select the US banner from AEM as shown in the image below.





Repeat the same process for the UK with the respective segment and banner selection.

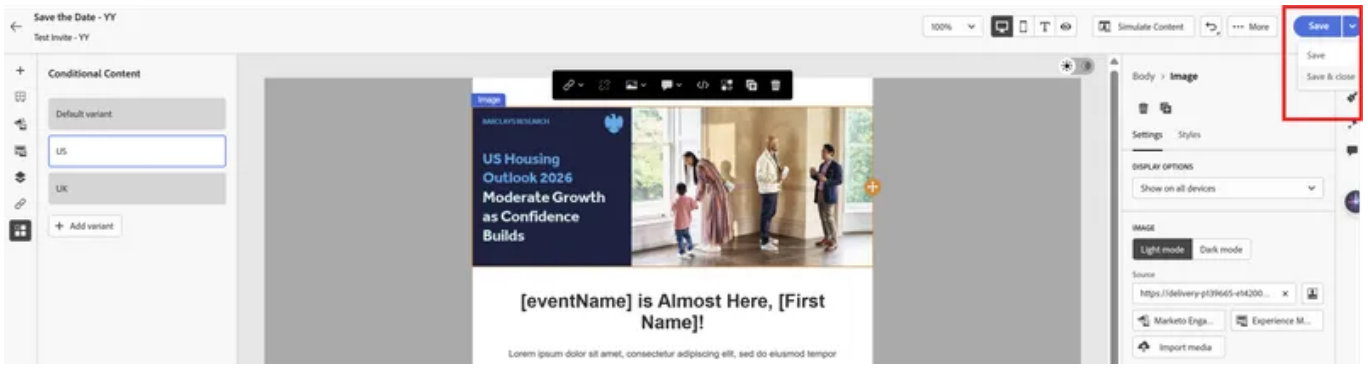
5. Select the respective country to see the specific banner for each country.

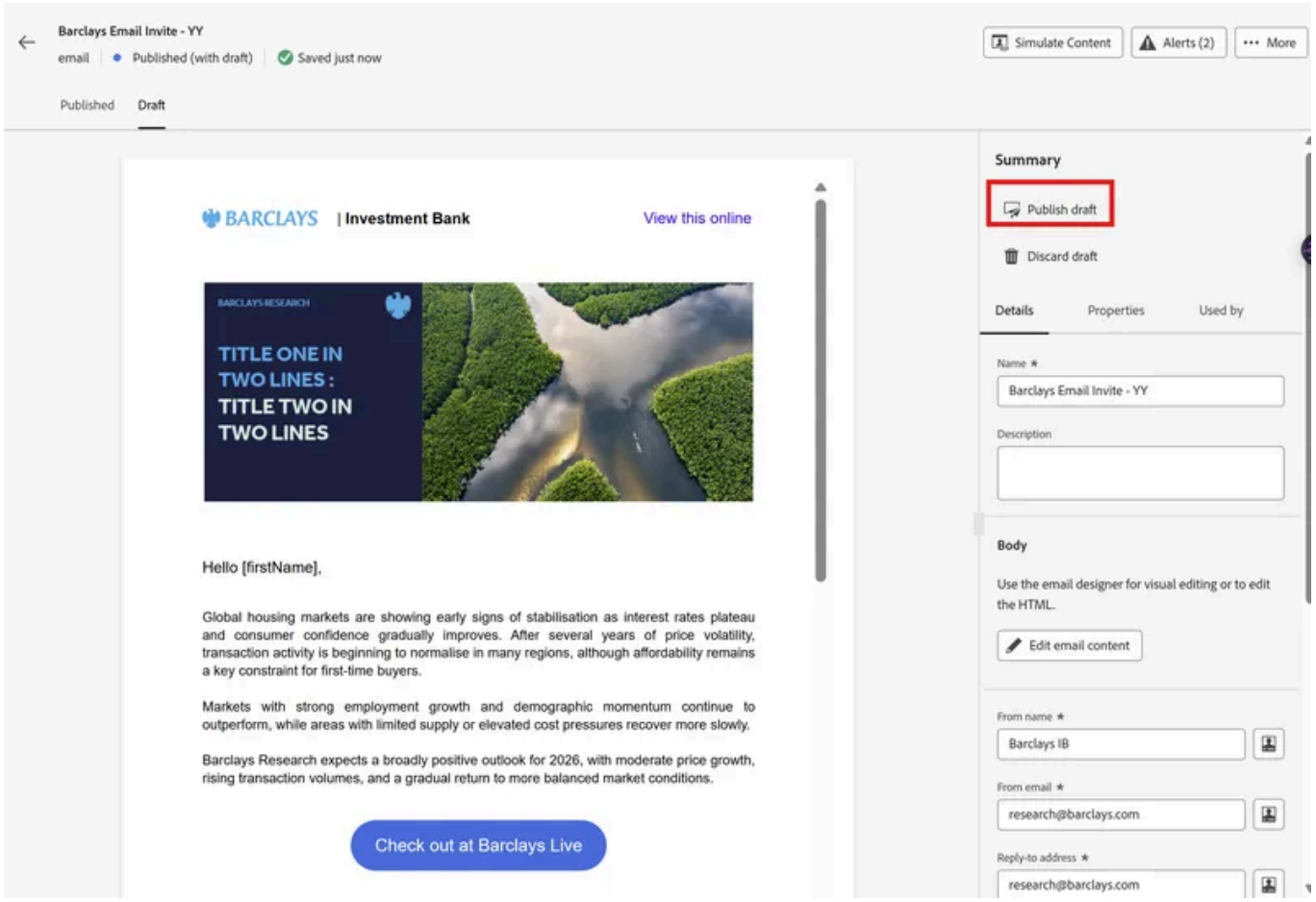


Note: There is a new AI capability within the email designer. AI Assistant in the Marketo Engage Email Designer helps you create contemporary, performant, and intuitive emails.

Example prompt: Update the content for Barclays housing prospects

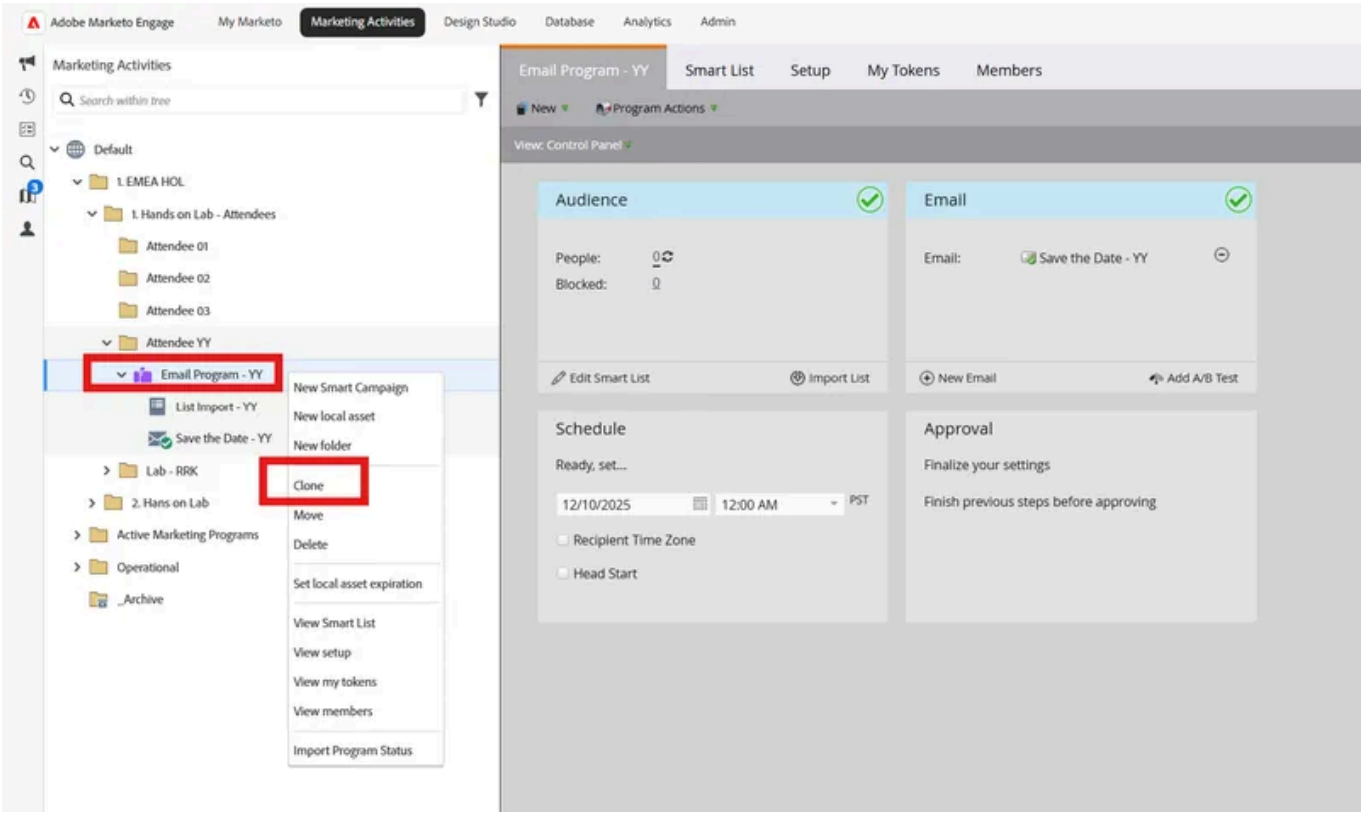
6. Save and close the email, and publish the draft for the changes to be applied.


Save the Date - YY
Test Invite - YY
Conditional Content
Default variant
US
UK
Add variant
Simulate Content
More
Save
Save & close
Body > Image
Settings
Styles
DISPLAY OPTIONS
Show on all devices
IMAGE
Light mode
Dark mode
Import media
US Housing Outlook 2026 Moderate Growth as Confidence Builds
[eventName] is Almost Here, [First Name]!
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor

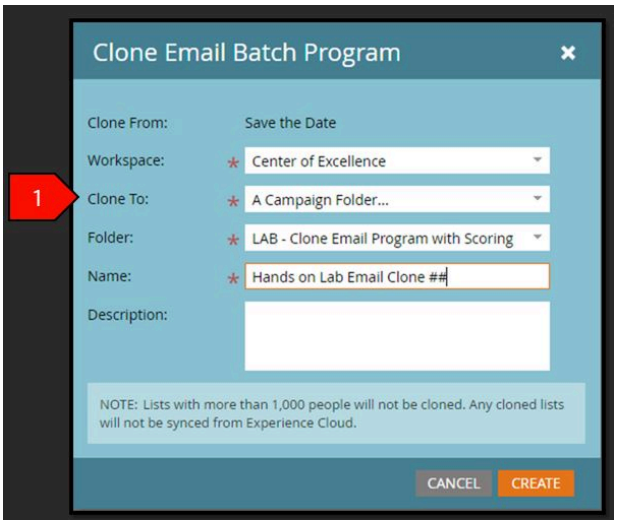

Barclays Email Invite - YY
email
Published (with draft)
Saved just now
Simulate Content
Alerts (2)
More
Published
Draft
BARCLAYS | Investment Bank
View this online
BARCLAYS RESEARCH
TITLE ONE IN TWO LINES : TITLE TWO IN TWO LINES
Hello [firstName],
Global housing markets are showing early signs of stabilisation as interest rates plateau and consumer confidence gradually improves. After several years of price volatility, transaction activity is beginning to normalise in many regions, although affordability remains a key constraint for first-time buyers.
Markets with strong employment growth and demographic momentum continue to outperform, while areas with limited supply or elevated cost pressures recover more slowly.
Barclays Research expects a broadly positive outlook for 2026, with moderate price growth, rising transaction volumes, and a gradual return to more balanced market conditions.
Check out at Barclays Live
Summary
Publish draft
Discard draft
Details
Properties
Used by
Name *
Barclays Email Invite - YY
Description
Body
Use the email designer for visual editing or to edit the HTML.
Edit email content
From name *
Barclays IB
From email *
research@barclays.com
Reply-to address *
research@barclays.com

3.4.1.3. Clone Email Program with Scoring

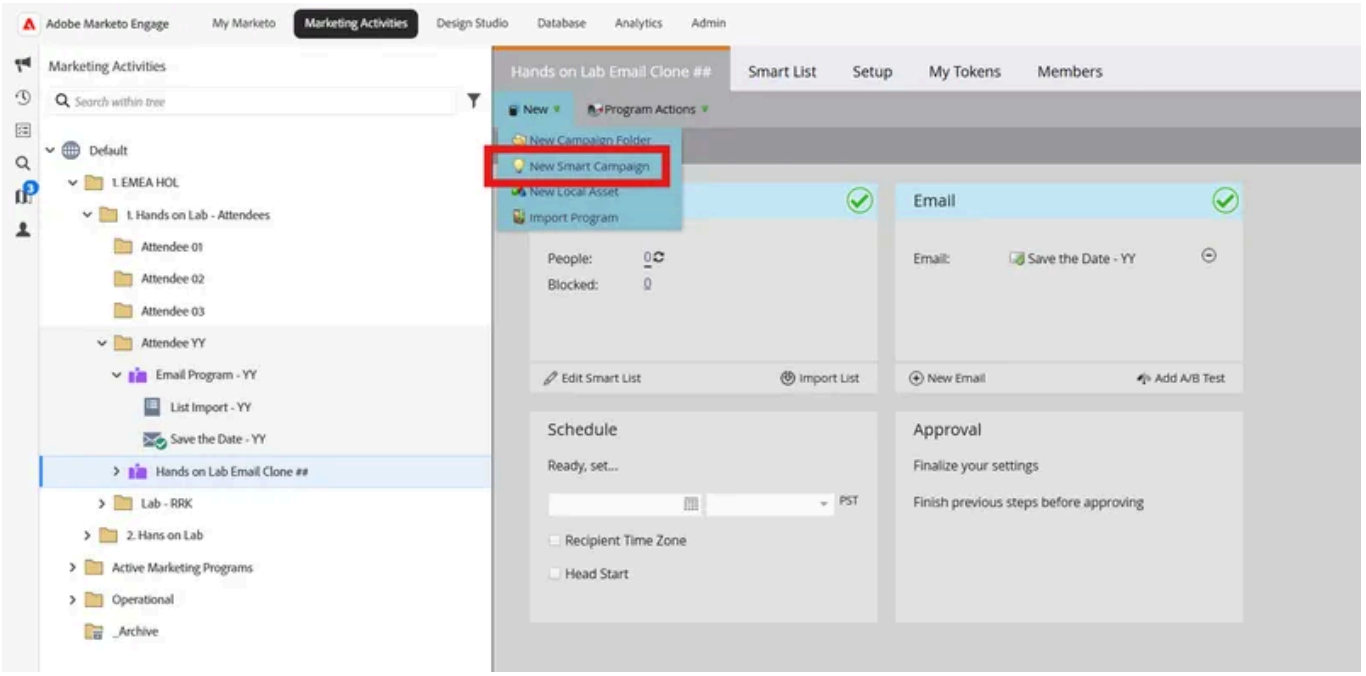
1. From our Previous Exercise, Right-Click on your program, select **Clone**



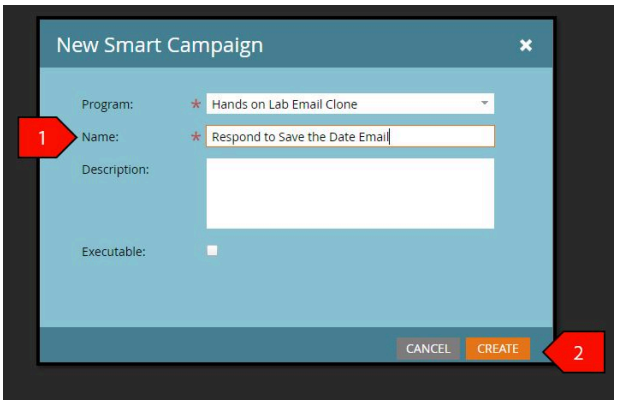
2. Click **Save** after the following fields have been filled out
    - Clone To: `A Campaign Folder…`
    - Name: `Hands on Lab Email Clone ##`
    - Folder: `Attendee ##`
    - Folder Description: Leave blank
    -



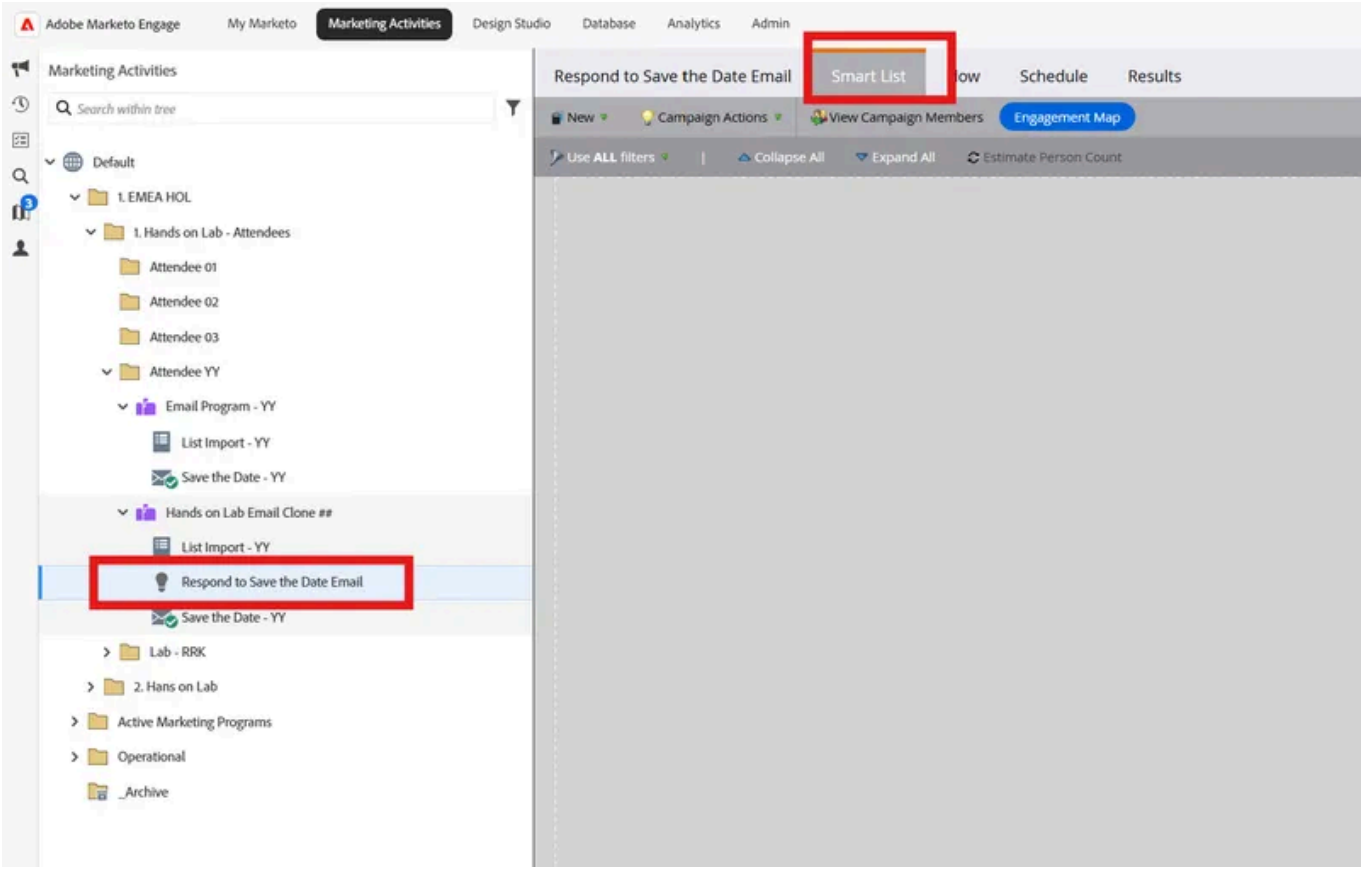
3. Click on the **New,** drop-down menu, select **New Smart Campaign**



4. Click **Create** after the following fields have been populated:
    - Program: `Hands on Lab Email Clone`
    - Name: `Respond to Barclays Email Invite - ##`
    - Description: Leave blank



5. Inside your Smart Campaign menu click on the **Smart List** Tab



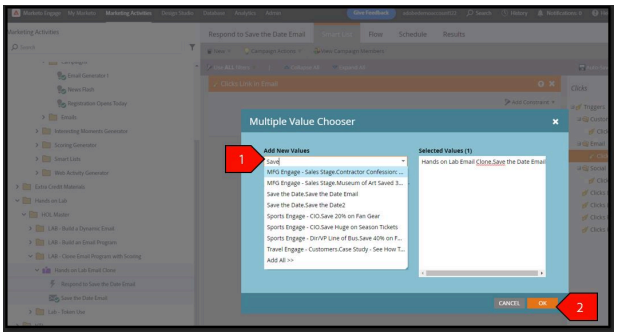
6. On the right from in the search bar, type `Clicks` in order to limit the Triggers Results.



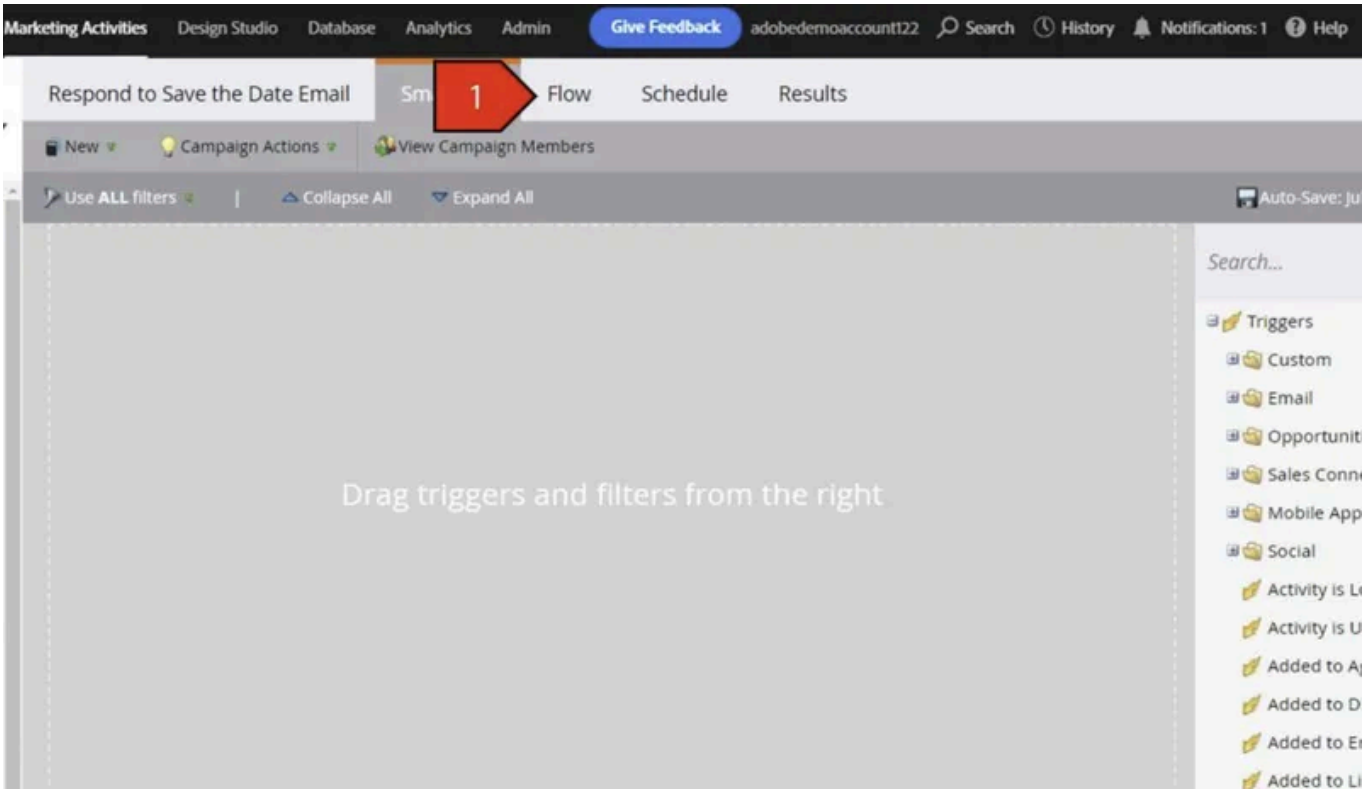
7. Select **Clicks Link in Email** and drag this filter on the canvas, and click on the '**+**' symbol to add the criteria.



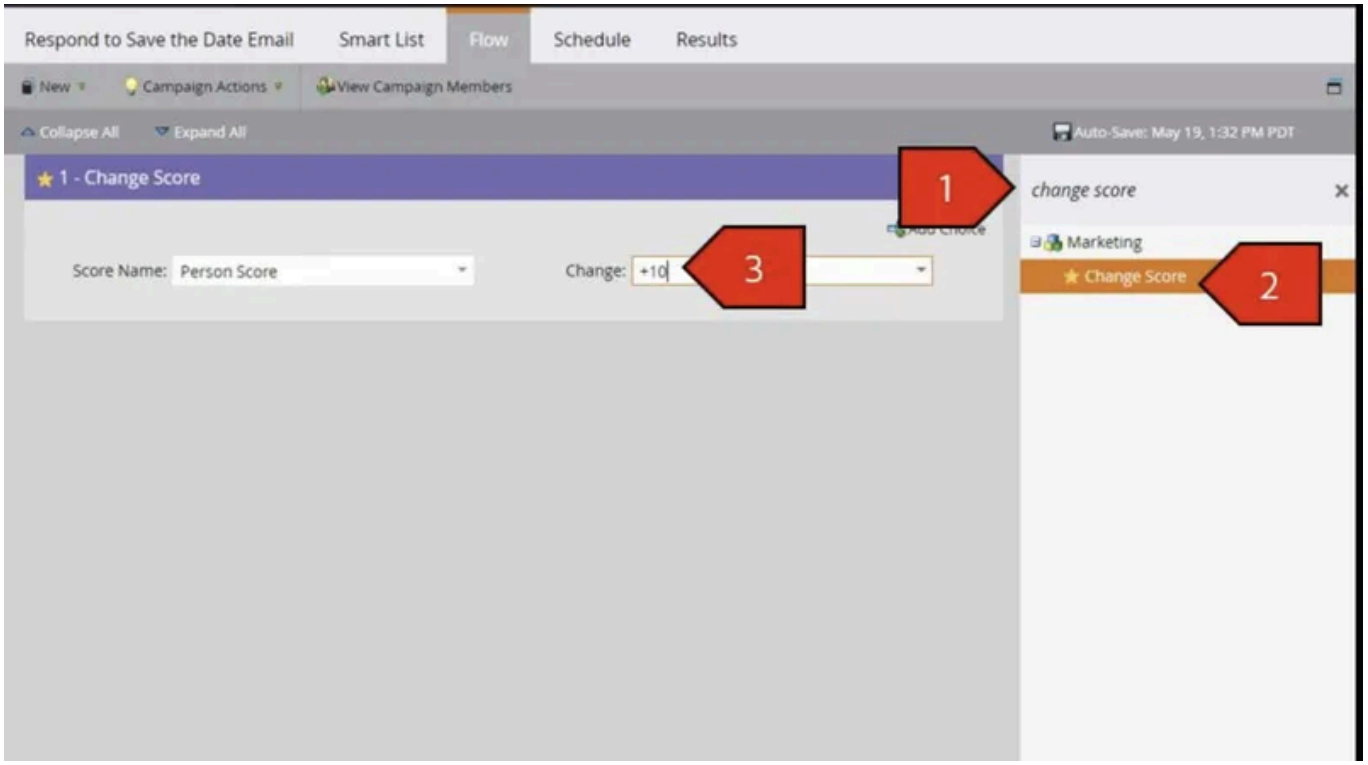
- On the trigger click **Add New Values**, Type Barclays, select **Hands on Lab Email Clone.Barclays Email Invite - YY,** Click **OK**



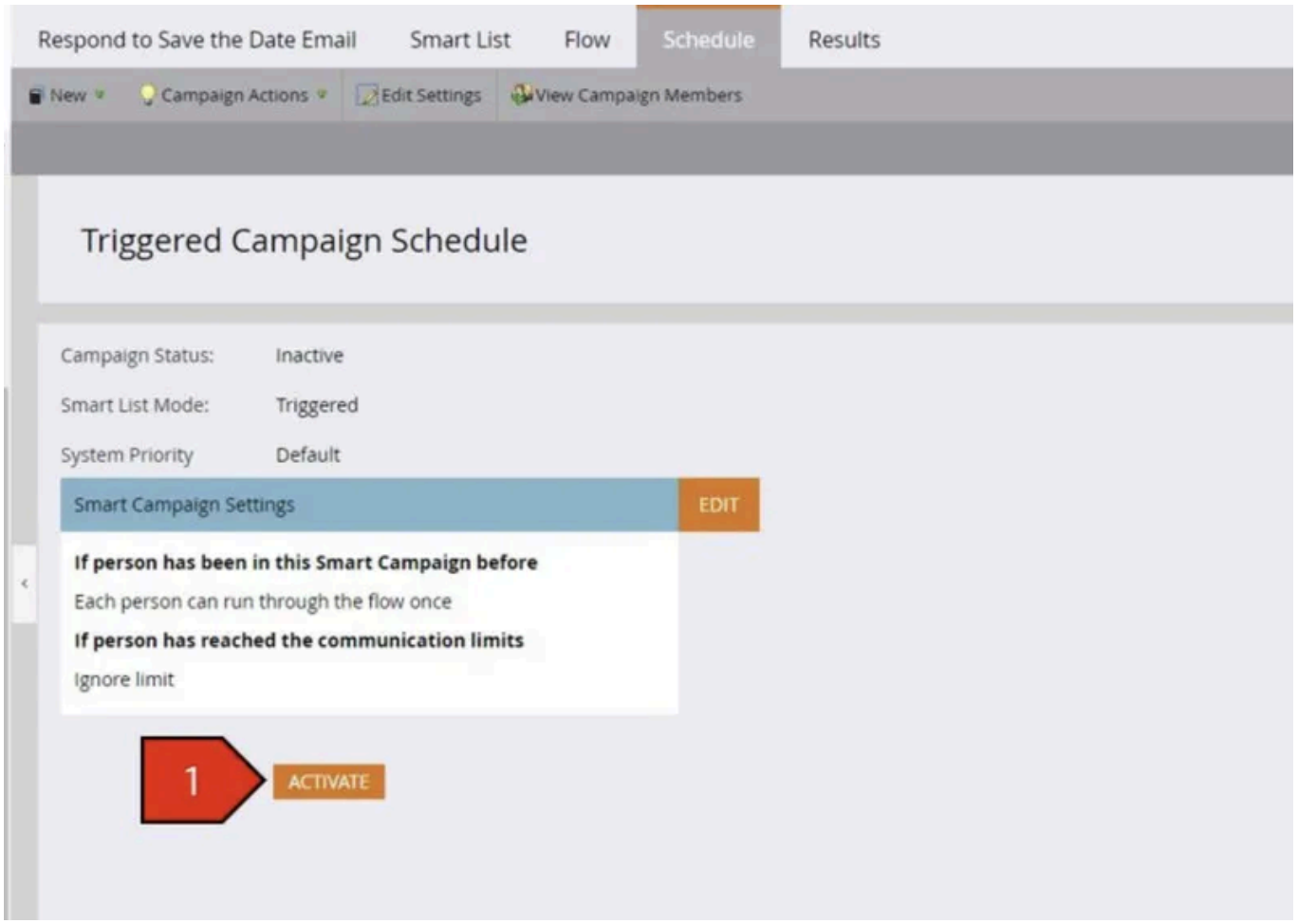
8. Click on the **Flow** Tab



9. On the right In the search bar, type `Change Score`
10. Drag this filter on the canvas with the following criteria:
    - Score Name: Select **Person Score**
    - Type in Change:
    - `+10`



11. Click the **Schedule** Tab, Click **Activate**


Respond to Save the Date Email
Smart List
Flow
Schedule
Results
New
Campaign Actions
Edit Settings
View Campaign Members
Triggered Campaign Schedule
Campaign Status:
Inactive
Smart List Mode:
Triggered
System Priority
Default
Smart Campaign Settings
EDIT
If person has been in this Smart Campaign before
Each person can run through the flow once
If person has reached the communication limits
Ignore limit
1
ACTIVATE

3.5. event-and-engagement-programs

3.5.1. Events and engagement programs

Overview:

The "Events & Engagement Programs" module in the Marketo Hands-On Lab is a comprehensive guide designed to equip users with the knowledge and skills needed to effectively create and manage event and engagement programs in Marketo. This module is ideal for those who are involved in event marketing, engagement strategies, or anyone looking to deepen their understanding of these critical aspects of Marketo.

What You Will Learn:

1. **Creating Engagement Programs:** Delve into the process of setting up engagement programs like newsletters. Learn about content curation, scheduling, and audience segmentation.
2. **Advanced Engagement Program Tactics:** Explore additional streams in engagement programs. Understand how to diversify content, target different audience segments, and measure engagement effectiveness.
3. **Building Event Programs:** Gain insights into organizing and executing basic event programs. Learn about event setup, promotion strategies, and attendee management.
4. **Efficient Event Program Management:** Discover the art of cloning event programs for efficient reuse. Understand when and how to replicate successful programs while maintaining program quality and relevance.

5. **Measuring Success and Analytics:** Learn how to track the performance of your engagement and event programs. Understand key metrics, analytics tools, and strategies for continuous improvement.

Exercises:

- **Exercise 1: Engagement Program – Newsletter**
  - Focus on creating an engaging newsletter program, including content creation, audience targeting, and scheduling.
- **Exercise 2: Engagement Program – Additional Streams**
  - Learn to add and manage multiple streams in an engagement program, catering to varied content needs and audience segments.
- **Exercise 3: Event Program – Basic**
  - Get hands-on experience in setting up a basic event program, covering aspects from initial setup to post-event analysis.
- **Exercise 4: Event Program – Cloning**
  - Master the technique of cloning successful event programs for efficient replication and adaptation for future events.

Target Audience:

This module is tailored for marketing professionals, event organizers, and digital marketers who are looking to excel in event and engagement program management within Marketo.

Duration:

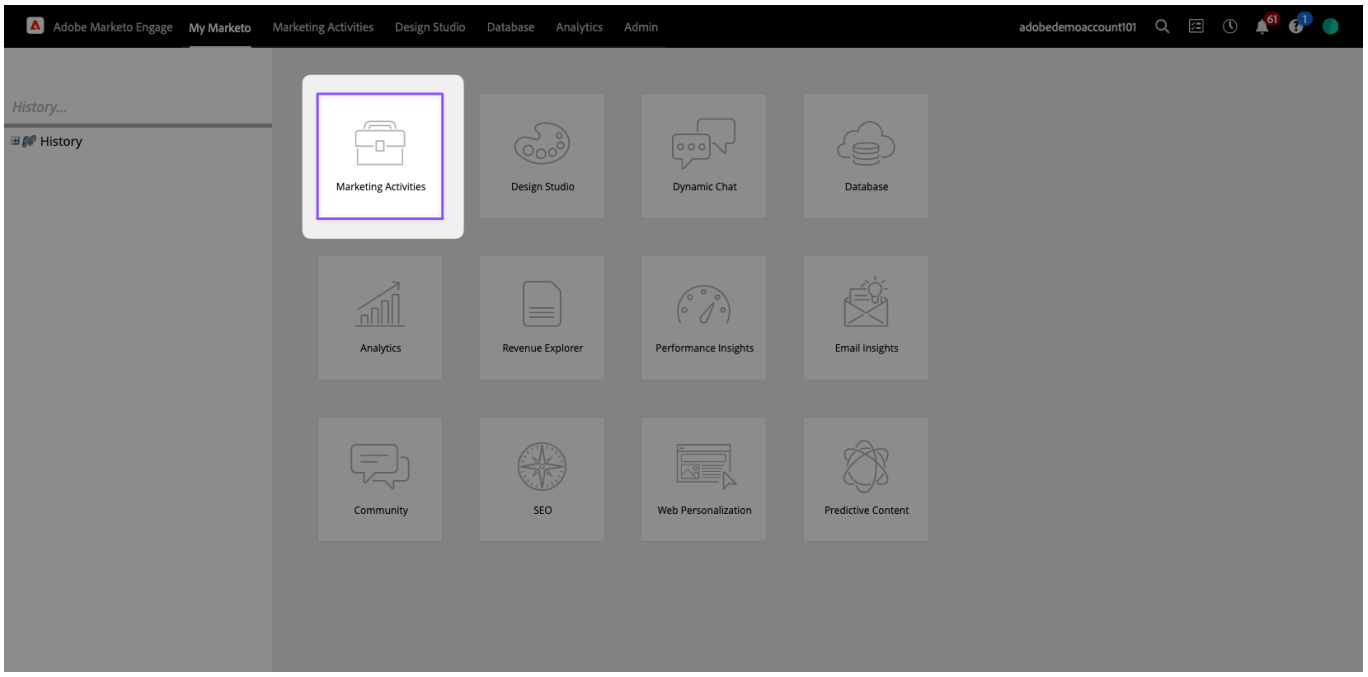
Estimated completion time of 60 minutes.

Getting Started:

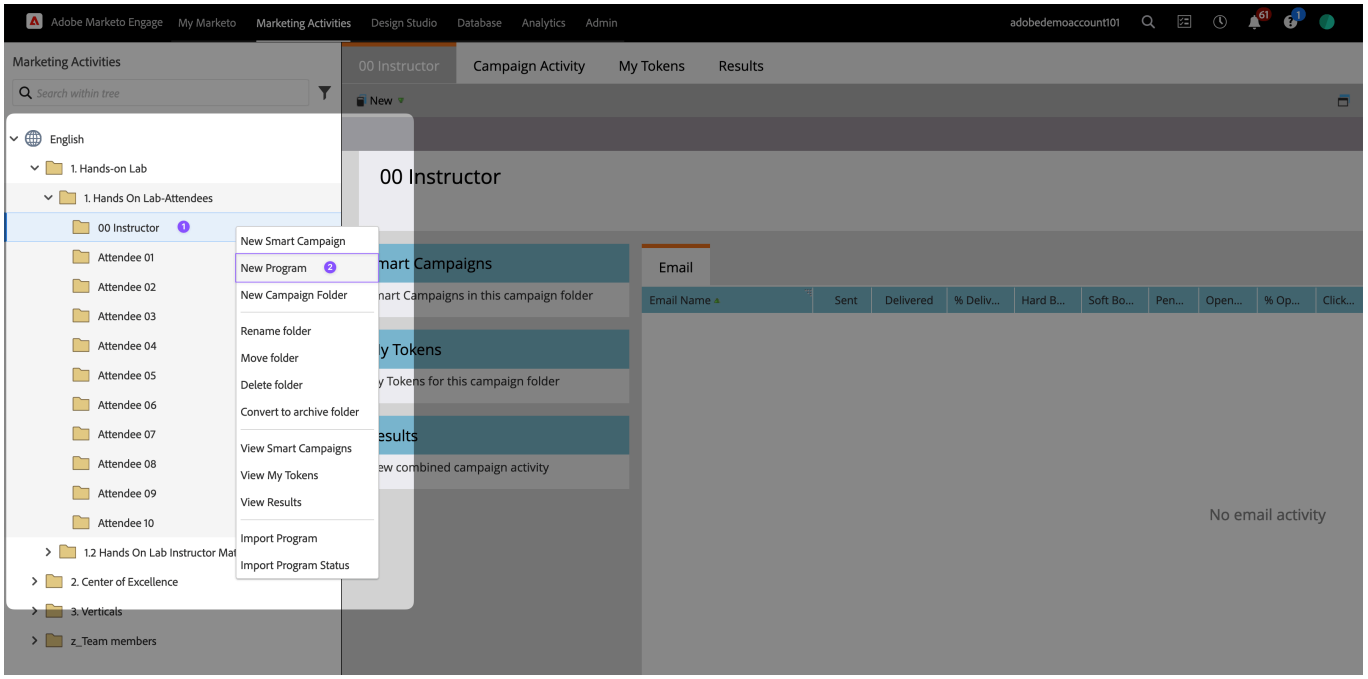
Begin your exploration into Events & Engagement Programs by diving into the first exercise: **Engagement Program – Newsletter**. Here, you will find step-by-step instructions and practical tasks to build your proficiency in managing effective engagement and event programs in Marketo.

3.5.1.1. Engagement Program -Newsletter

1. Navigate to **Marketing Activities**



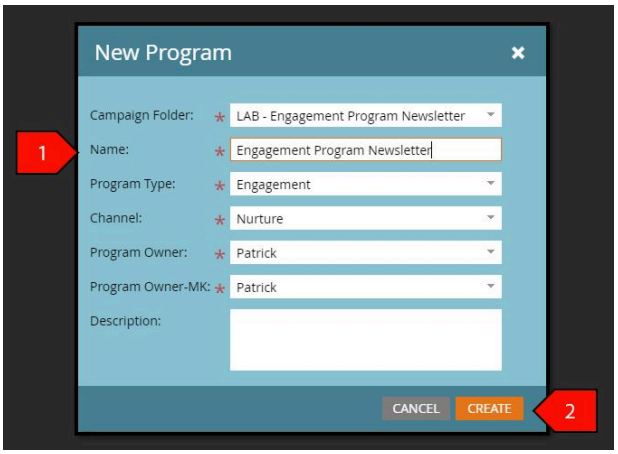
2. Go to your respective folder under **Hands-on Lab Attendee** Right-click and select **New Program**



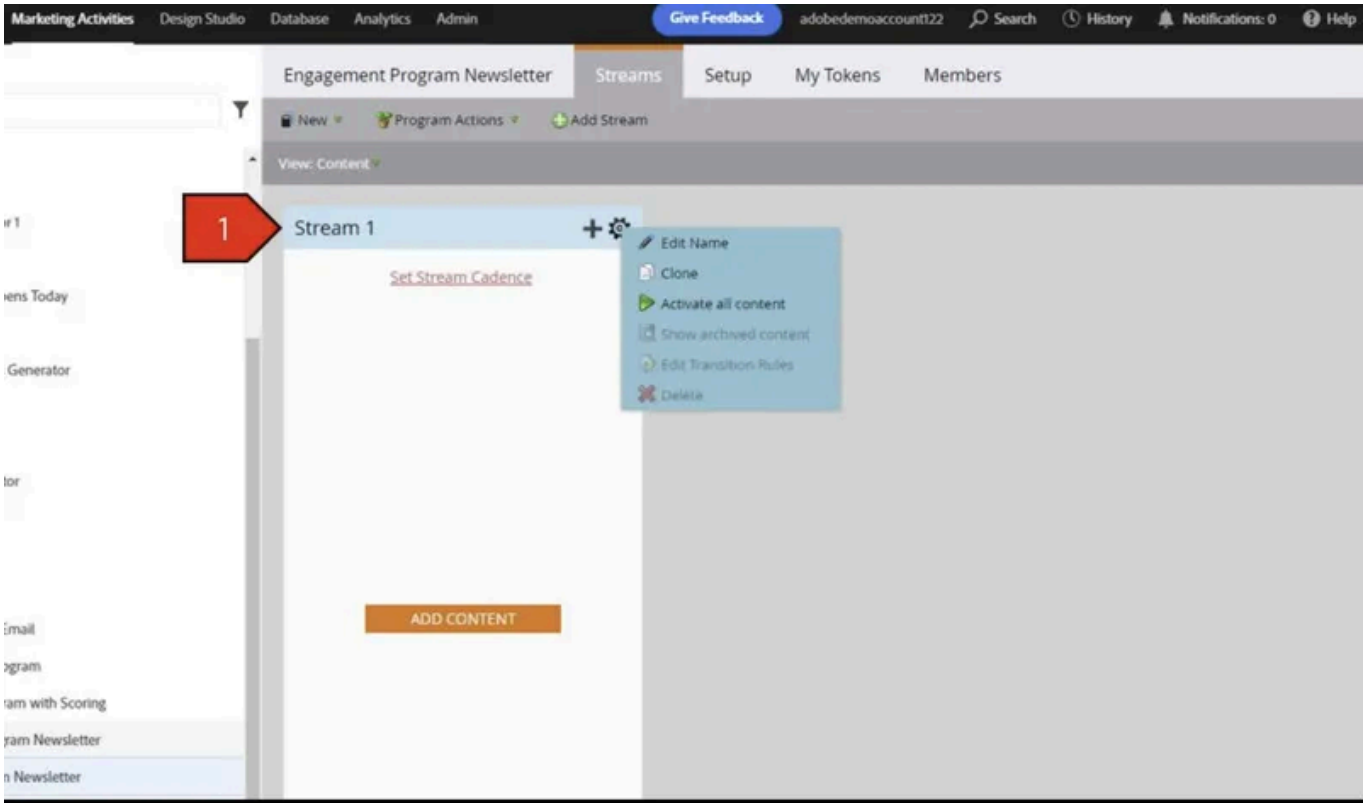
3. Name the new program “Engagement Program Newsletter - ##” (**Note**: replace ## with your attendee number

Click **Create** after the following fields have been filled out:

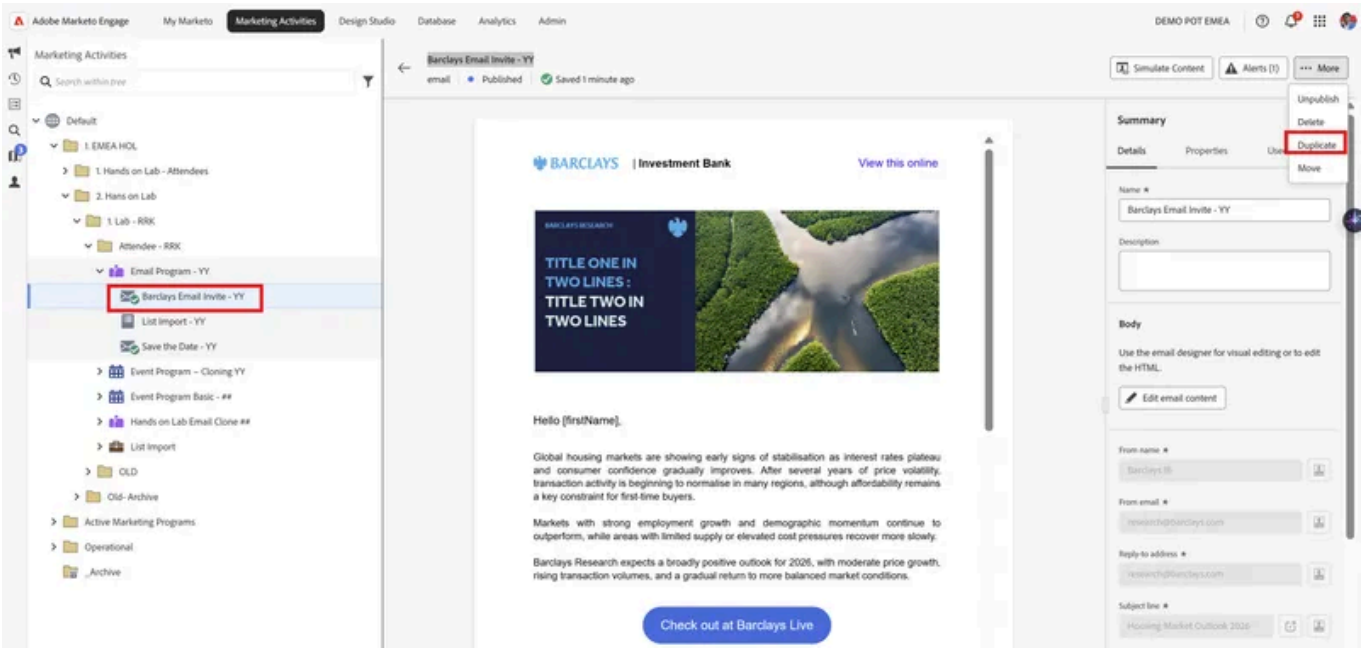
- Campaign Folder: `Attendee ## Folder`
- Name: `Engagement Program Newsletter`
- Program Type: `Engagement`
- Channel: `Nurture`
- Program Owner: `Patrick`
- Program Owner-MK: `Patrick`
- Description: Leave blank



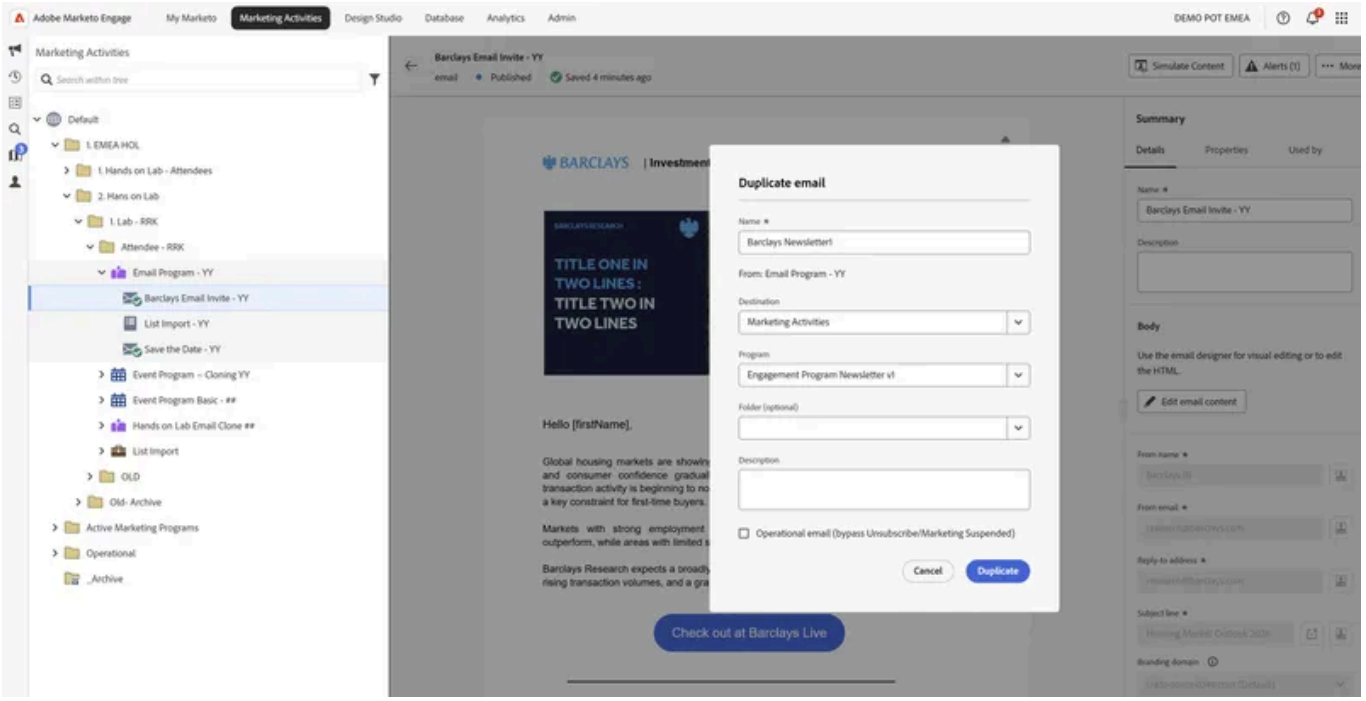
4. Click the gear and rename the stream to `Newsletter,` Add a new folder in the engagement program labeled `Emails`



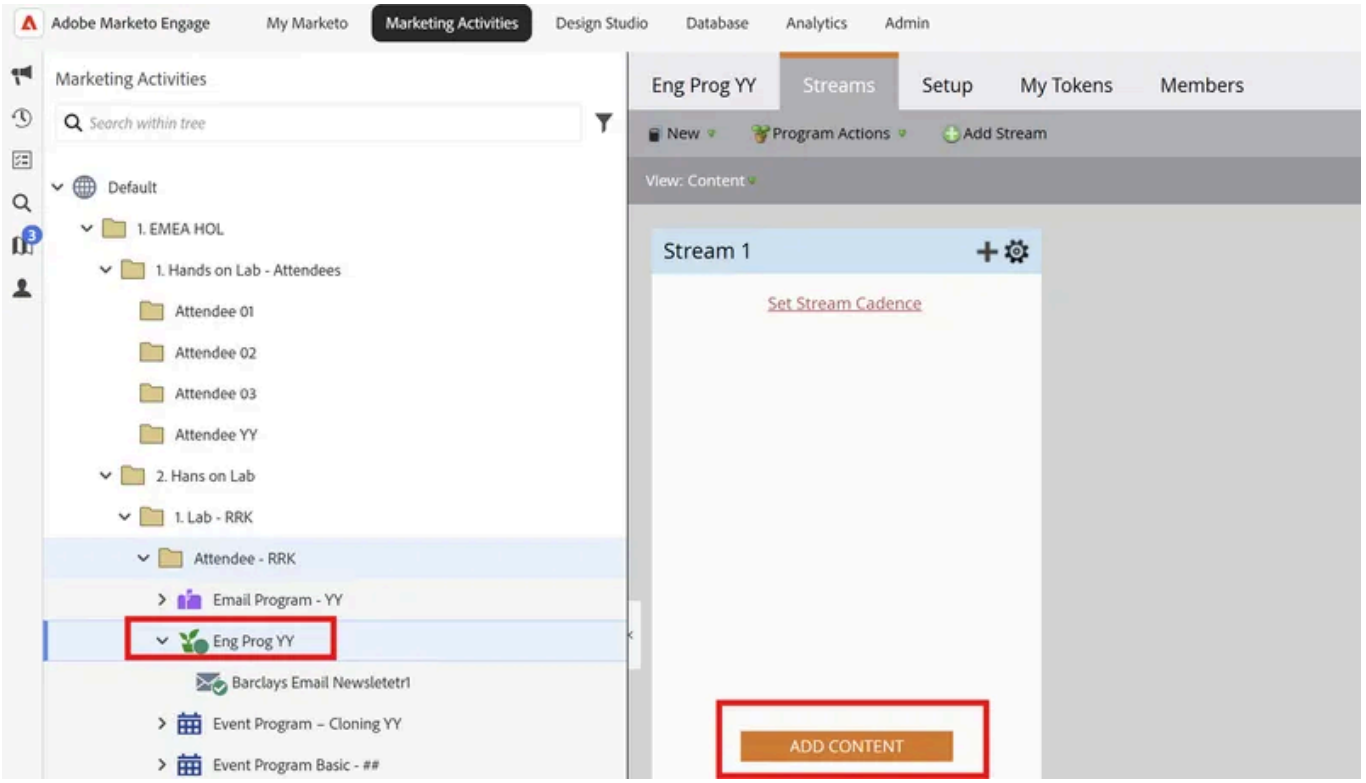
5. Click on the **Barclays Email Invite - YY** email you created in the previous sessions (your Hands-on Lab Email Clone ## program), select **More** and click **Duplicate.**

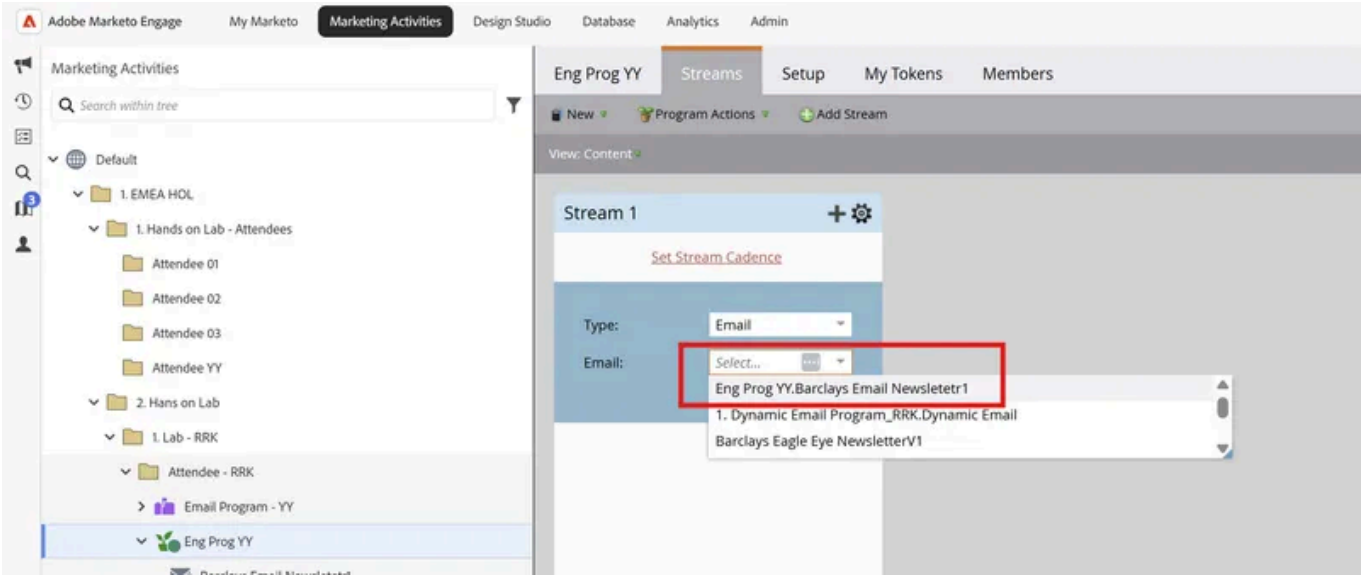


6. In the Program Field, select the **Engagement Program Newsletter-##** Program
7. Click **Create** after the following fields have been filled out:
    - Name: `Barclays Newsletter Email 1`
    - Program: `Engagement Program Newsletter - ##`

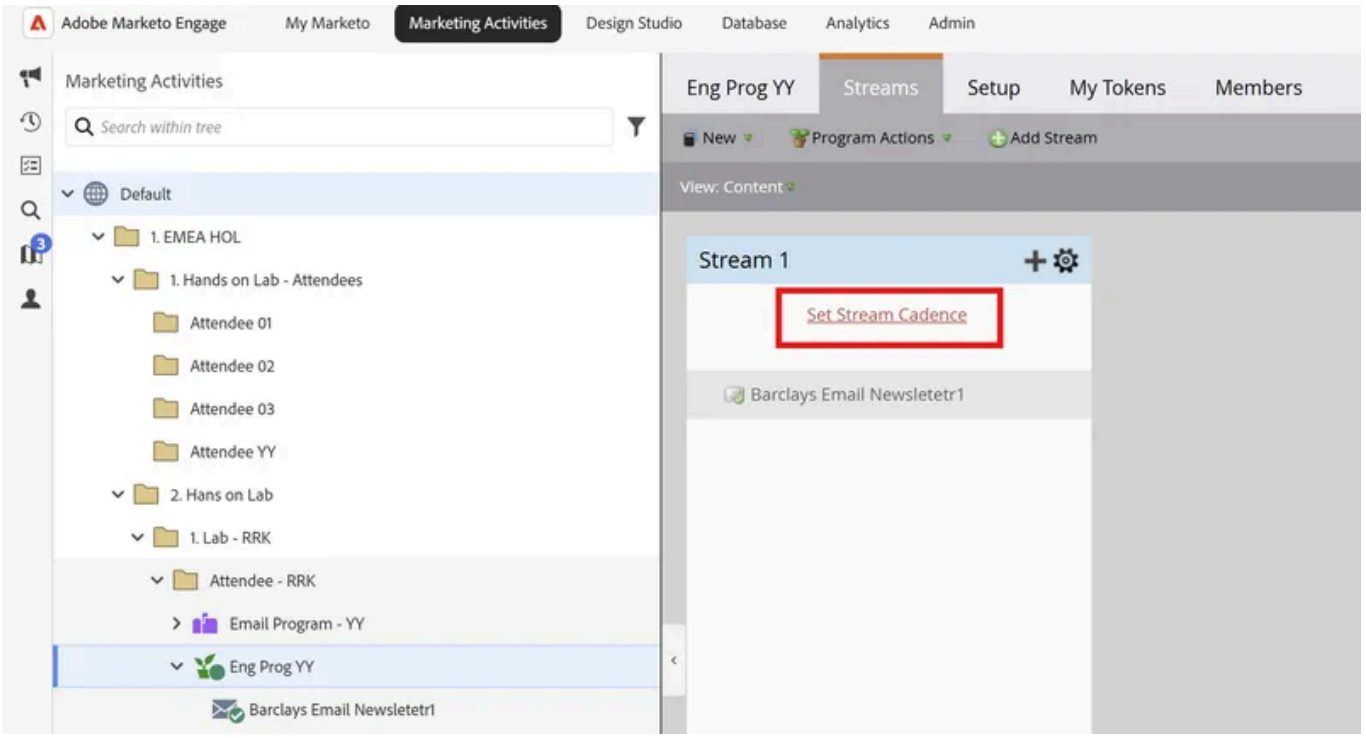


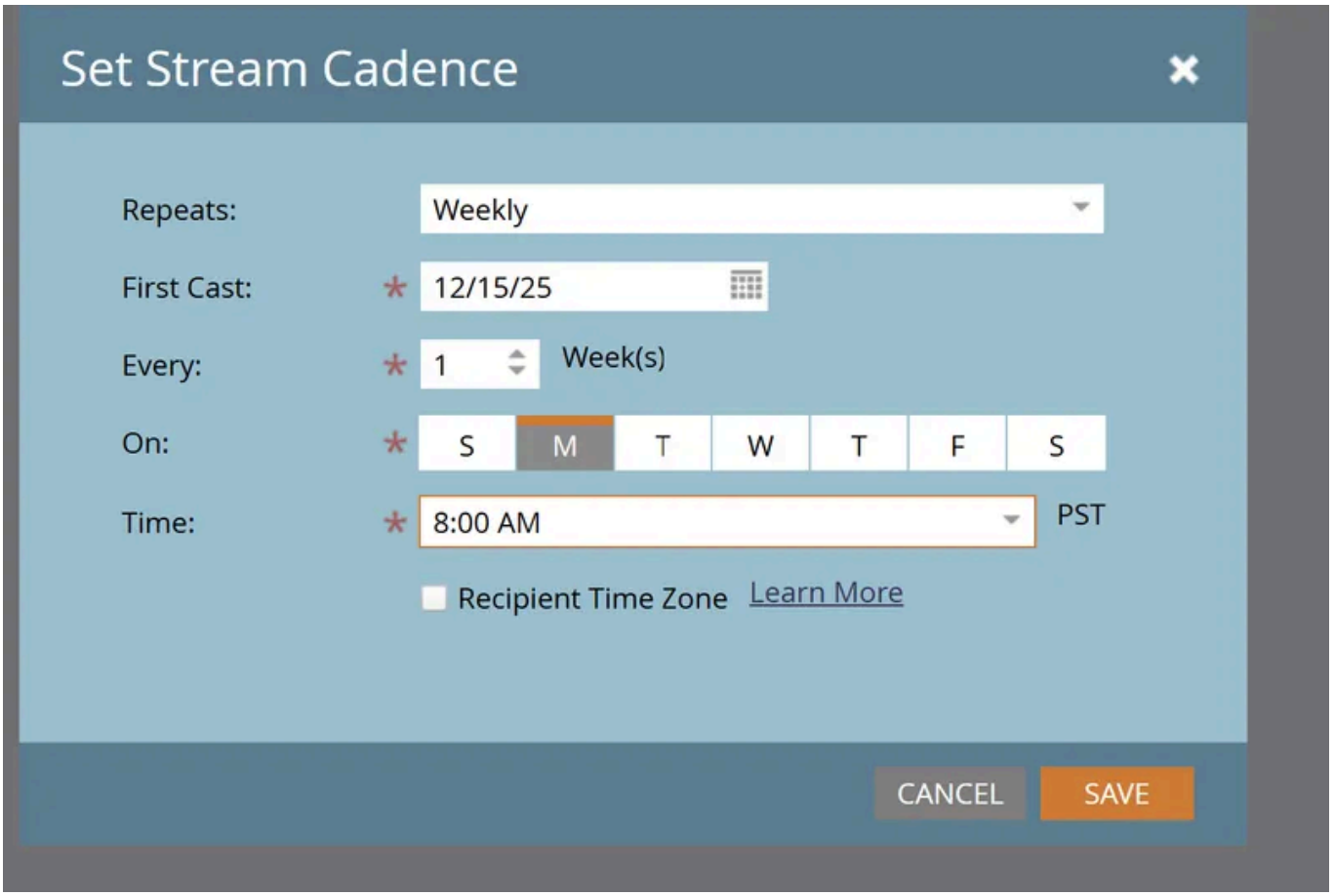
8. Save and Close, Publish. You will repeat this process so that you have cloned 4 emails to your Lab Engagement Program. Repeat for Emails 2-4;
9. Add all these 4 emails to the **Newsletter** stream by clicking **Add Content**.



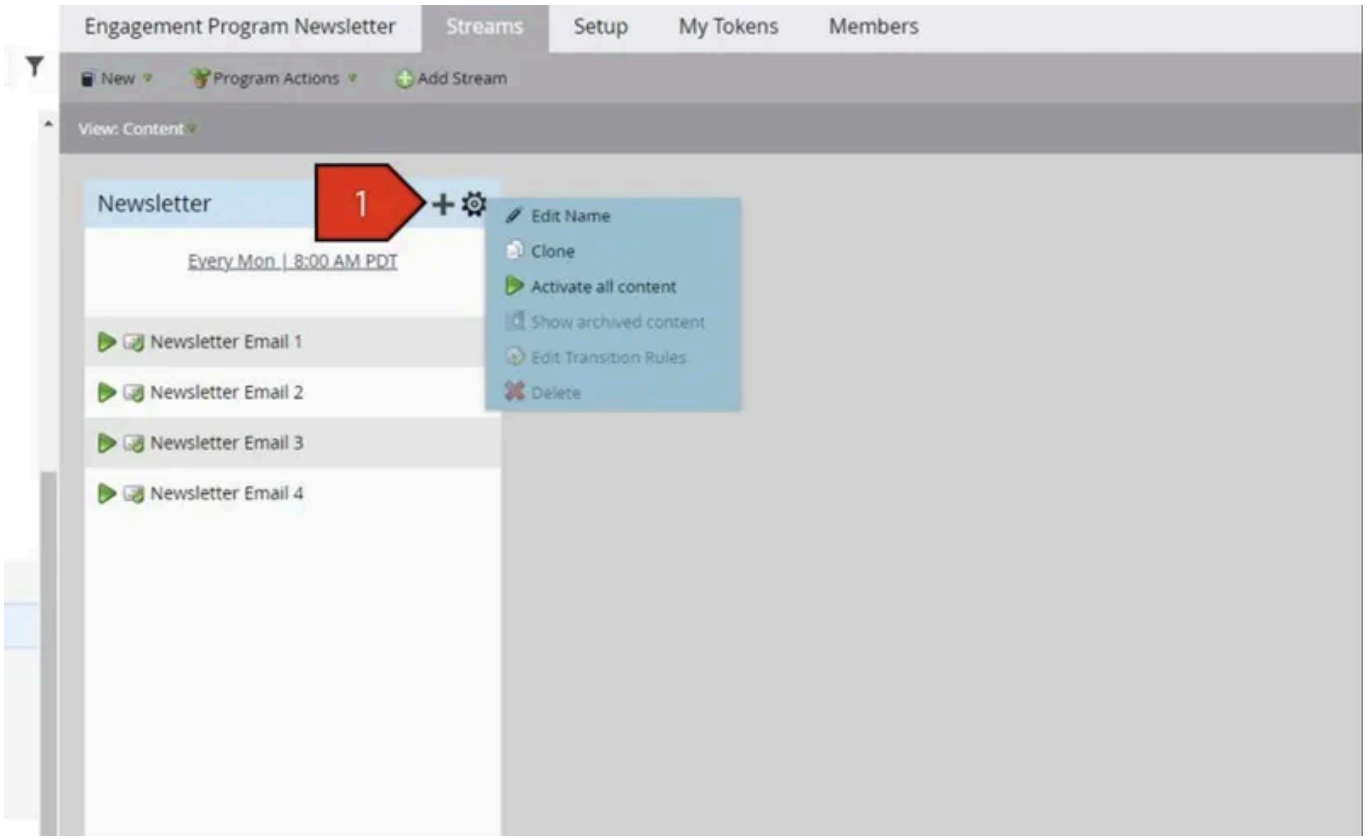


10. Select the date at the top of the stream to set a cadence for the email sends



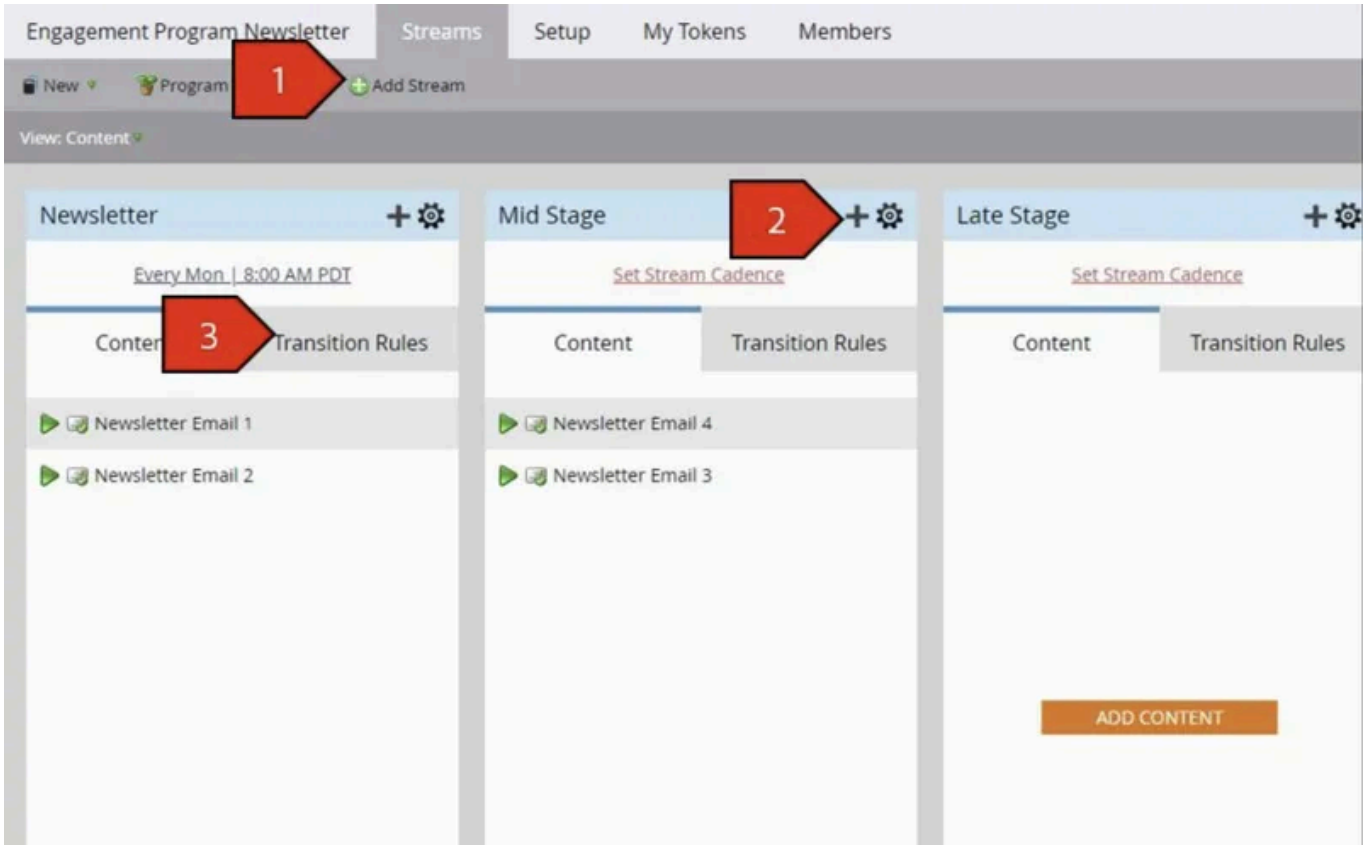


11. Activate the content by selecting the gear on the right corner of the stream

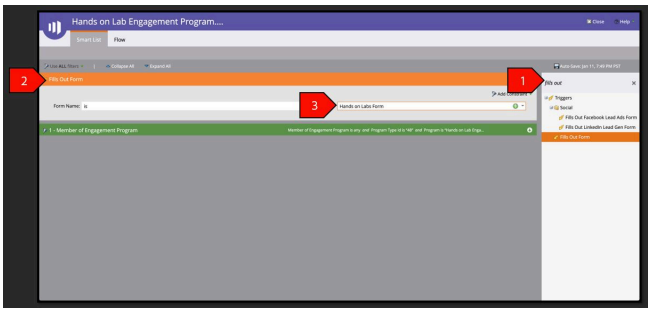

Engagement Program Newsletter
Streams
Setup
My Tokens
Members
New
Program Actions
Add Stream
View: Content
Newsletter
1
Every Mon | 8:00 AM PDT
Newsletter Email 1
Newsletter Email 2
Newsletter Email 3
Newsletter Email 4
Edit Name
Clone
Activate all content
Show archived content
Edit Transition Rules
Delete

3.5.1.2. Engagement Program – Additional Streams

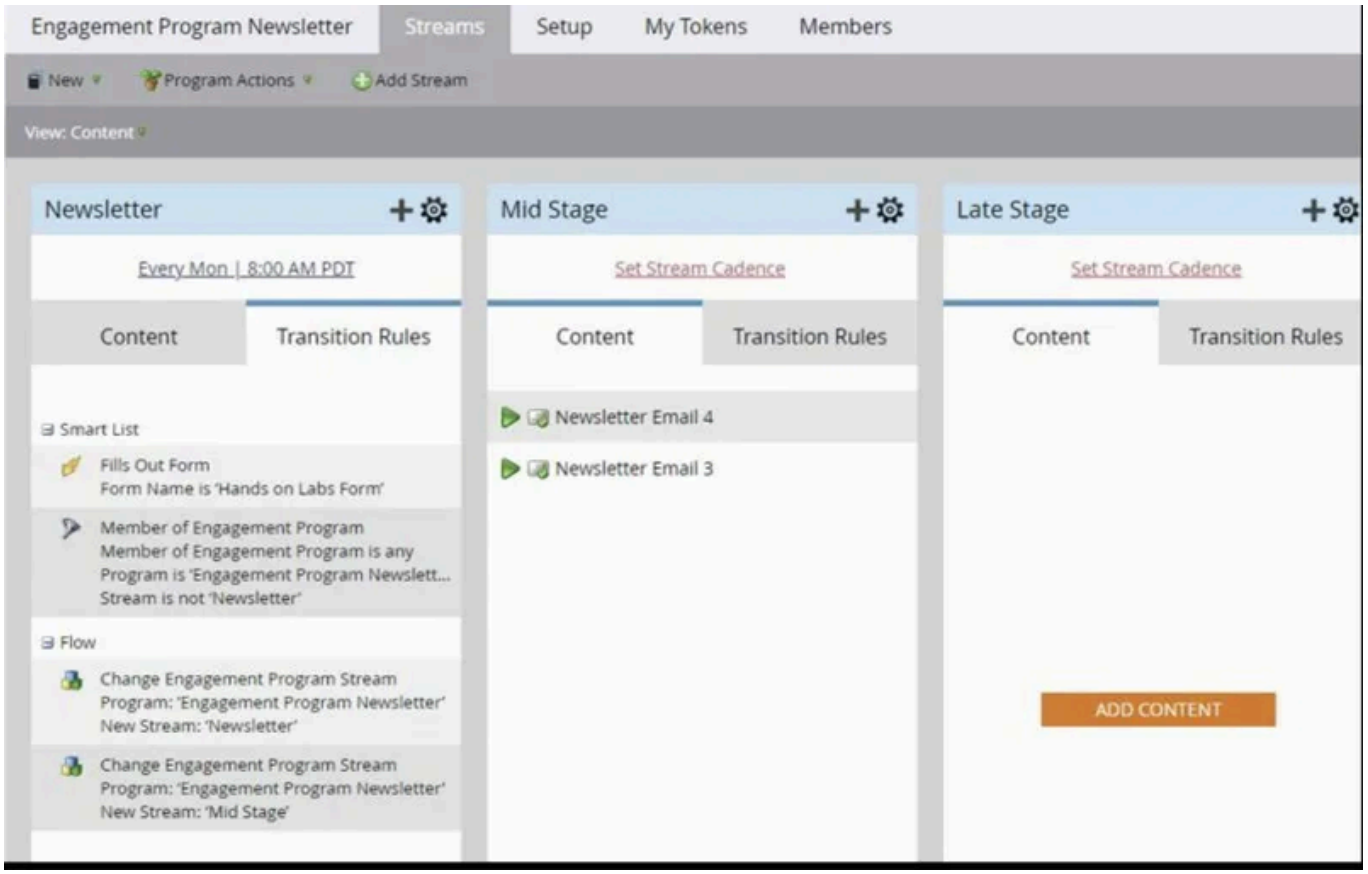
1. Leaving off from our previous lab, add 2 more streams. Rename them all as follows. Use the gear icon to rename the stream.
    - `Newsletter`
    - `Mid Stage`
    - `Late Stage`
2. Drag and drop emails into the Mid Stage and Late Stage streams
3. At the top of the stream, select the **Transition Rule** tab and click **Edit Transition Rules**



4. In the search bar on the right, type `Fills Out` to limit the Triggers shown. Drag the **Fills Out Form** trigger on the canvas, select Form Name: **Hands-on Lab Form v1**



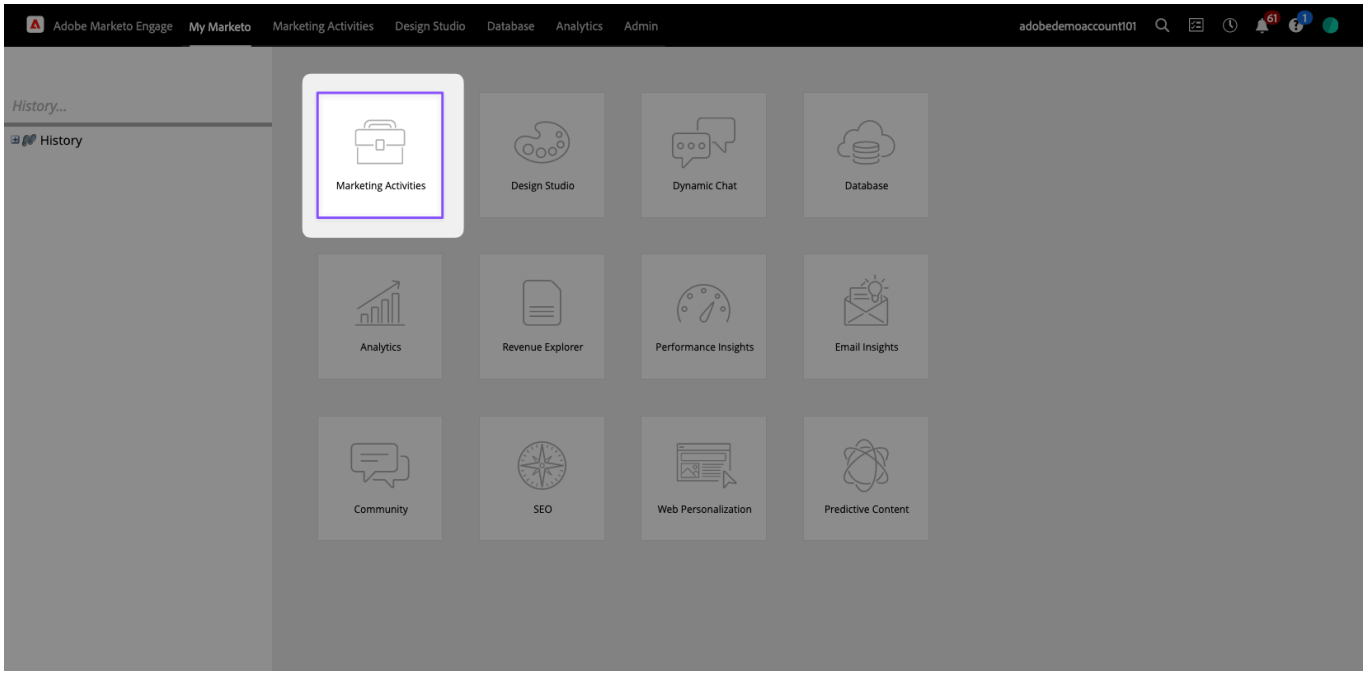
5. Click the **Flow** tab. Drag and drop the **Change Engagement Program Stream** from the list on the right with the following criteria:
    - Program: **Engagement Program Newsletter - ##**
    - Stream: **Mid Stage**



3.5.1.3. Event Program - Basic

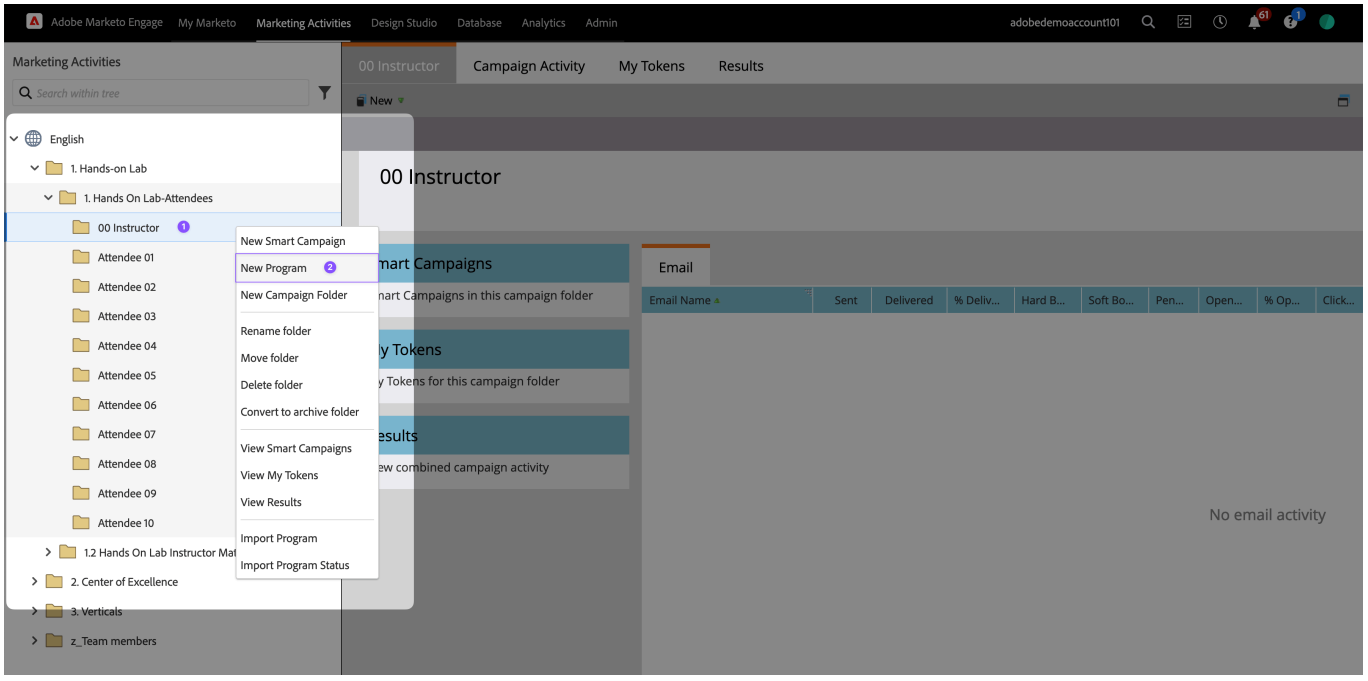
Create Event Program

1. Navigate to **Marketing Activities**



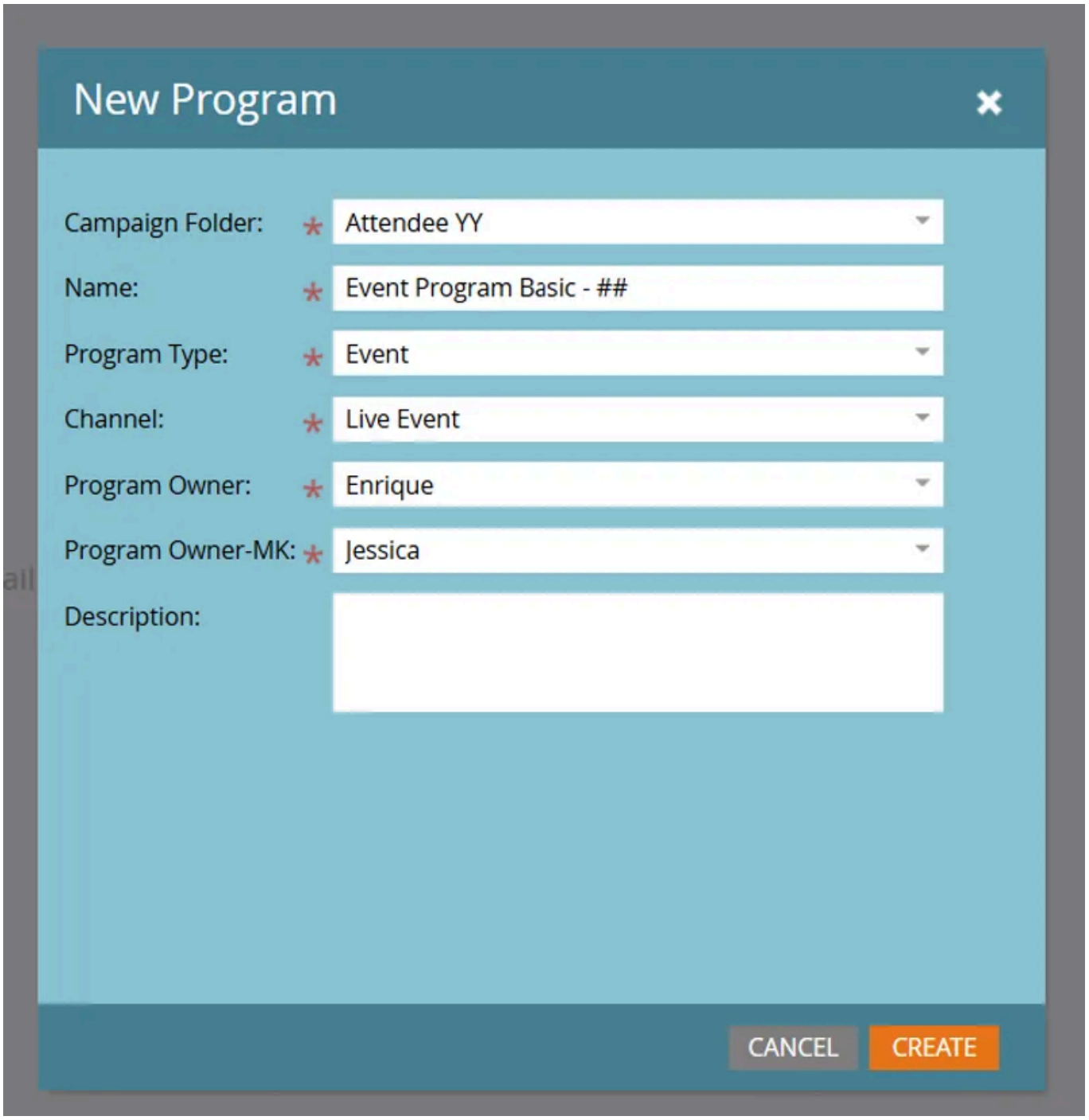
2. Go to your respective folder under **Hands-on Lab Attendee**

Right-click and select **New Program**

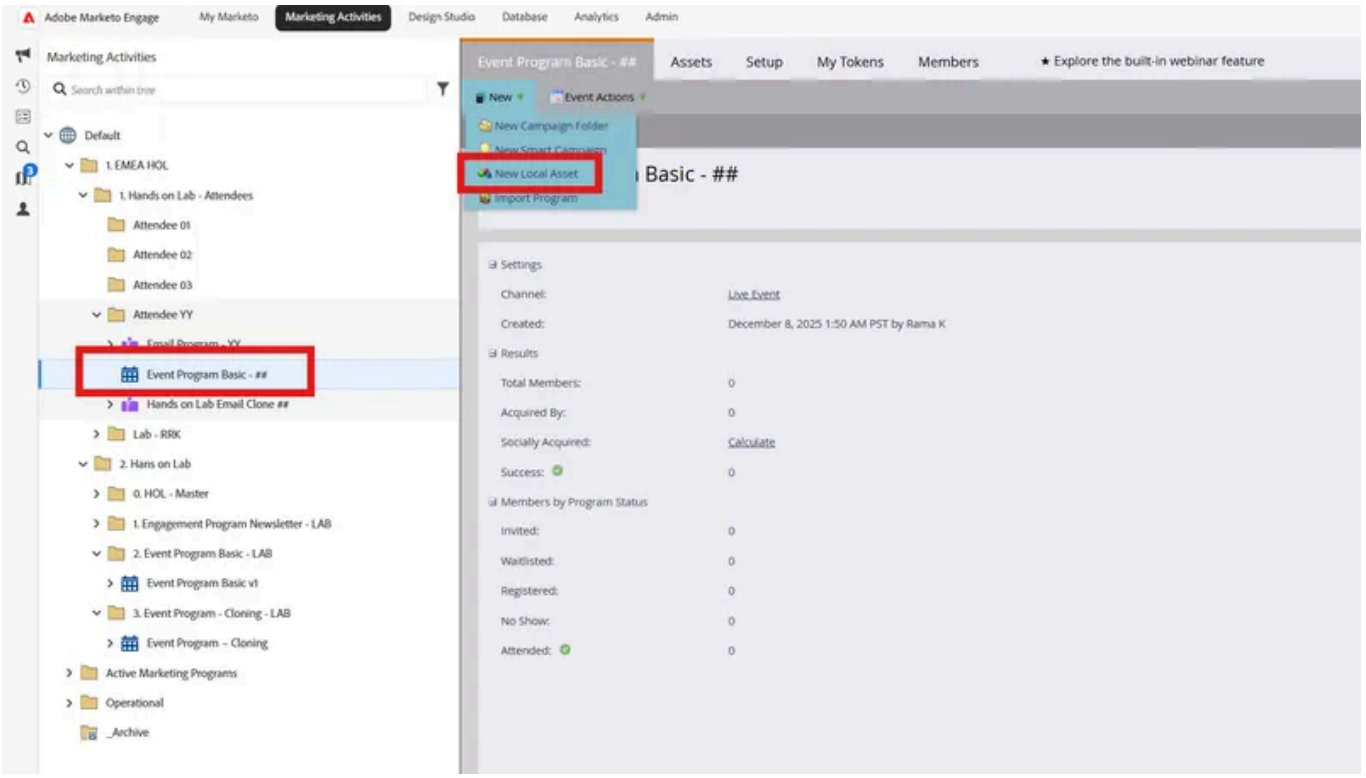


3. Name the new program “`Event Program Basic` - ##” (**Note**: replace ## with your attendee number e.g. “01”), Program type as **Event** and click **Create** after the following fields have been filled out:

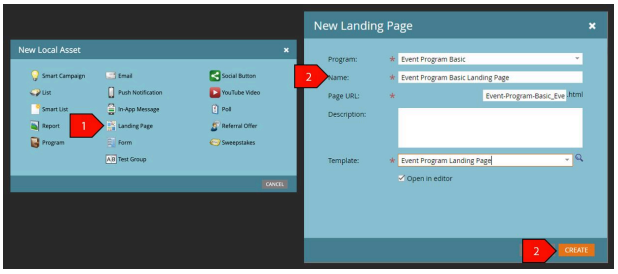
- Campaign Folder: `Attendee - ##`
- Folder Name: `Event Program Basic -##`
- Program Type: `Event`
- Channel: `Webinar`
- Program Owner: `Patrick`
- Program Owner: `Patrick`
- Description: Leave blank



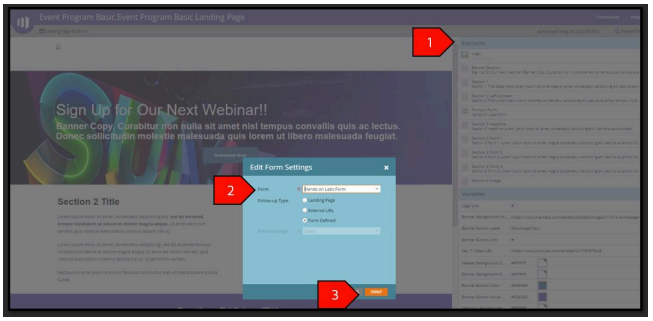
4. Select the **Event Program Basic - ##** you just created in your folder. Select **New**, then **New Local Asset**



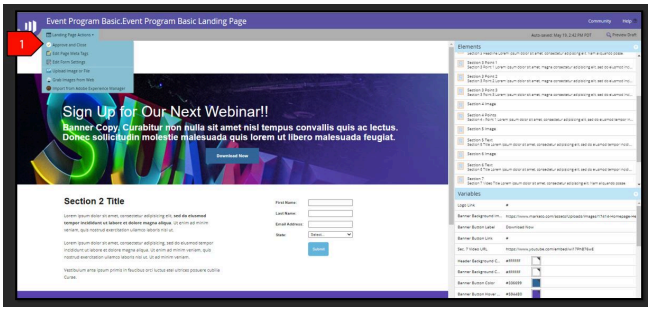
5. Select **Landing Page,** Click **Create** after the following fields have been filled out:
    - Program: `Event Program Basic - ##`
    - Name: `Event Program Basic Landing Page - ##`
    - Page URL: This value will auto-populate
    - Description: Leave blank
    - Template: Event Program Landing Page



6. Double-click on the **Form** Element, select the **Email Unsubscribe Form**, and click **Insert**

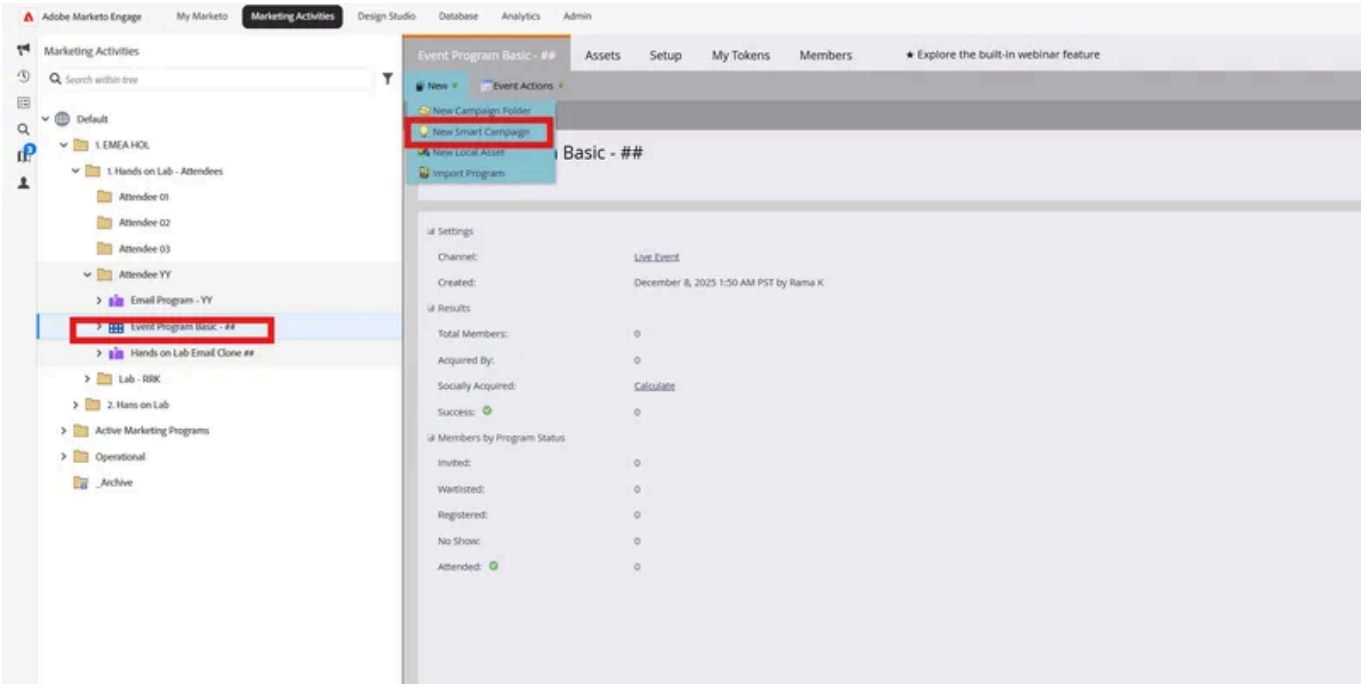


7. Select **Landing Page Action** then **Approve and Close**

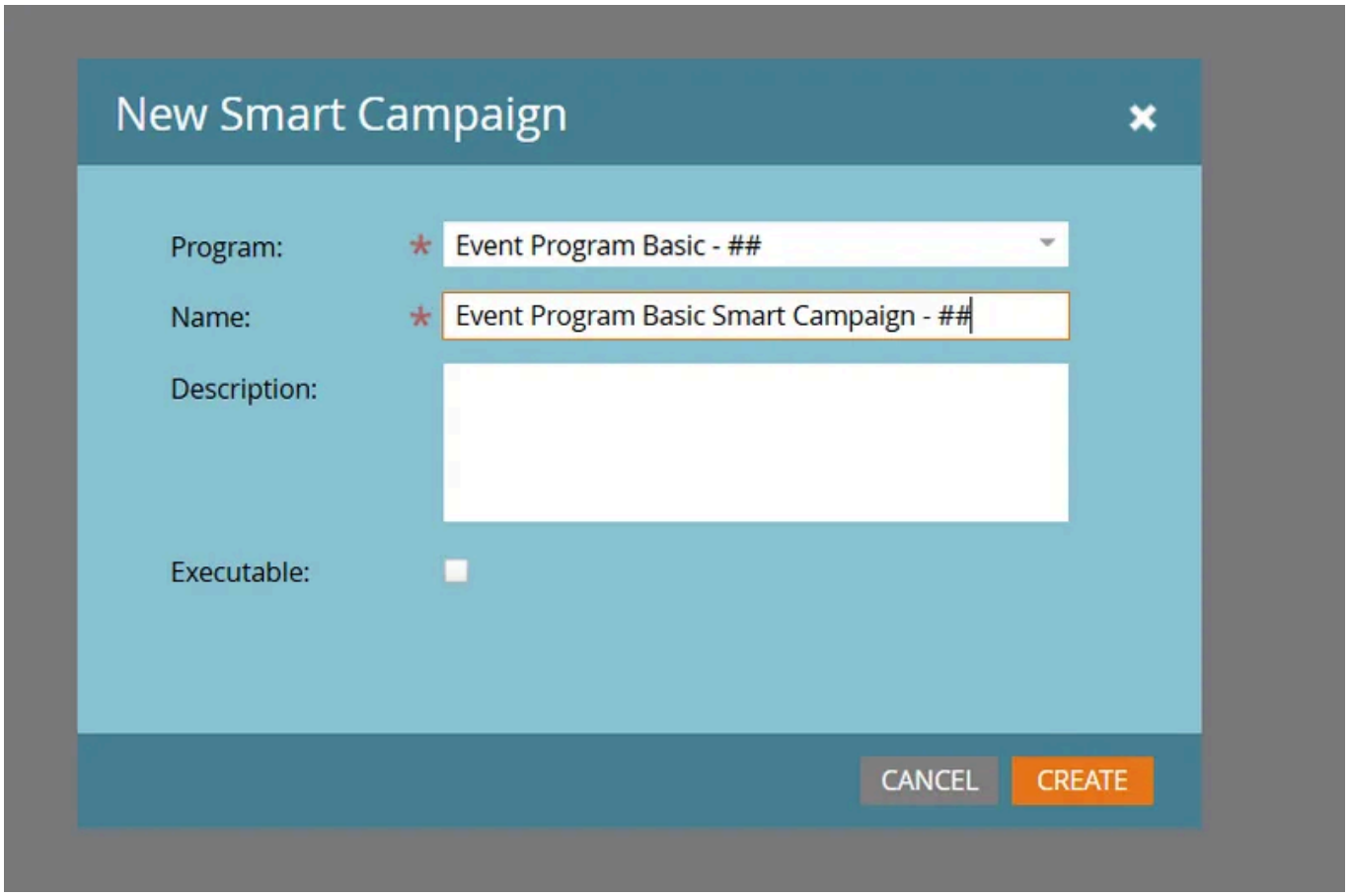


Create Nested Smart Campaign

1. Select **Event Program Basic** in your folder. Select **New,** select **New Smart Campaign**



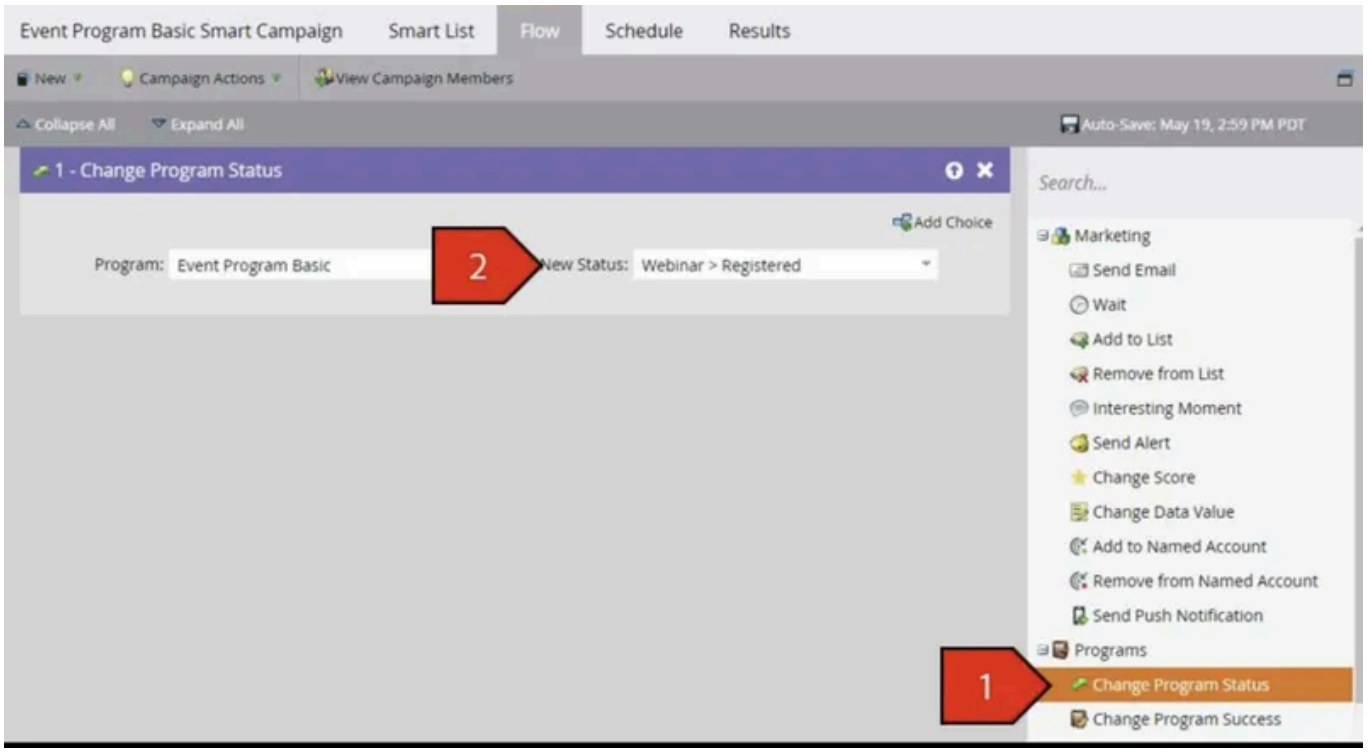
2. Click **Create** after the following fields have been filled out:
    - Program: `Event Program Basic - ##`
    - Name: `Event Program Basic Smart Campaign - ##`
    - Description: Leave blank



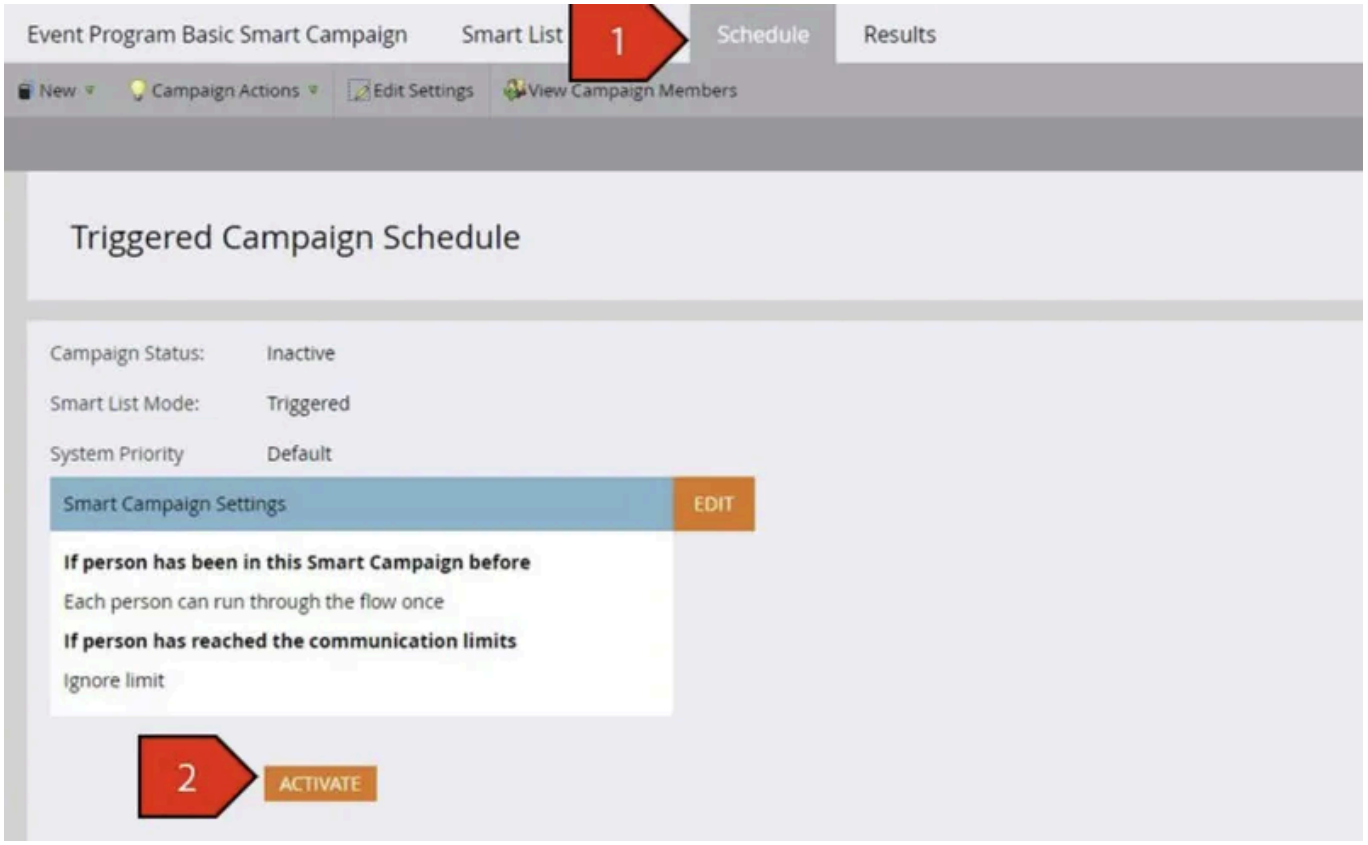
3. Select the smart campaign you just created in your folder, click **Smart List** tab
4. Type `form` in the search filter and drag out the **Fills Out Form** filter with the following criteria:
    - Form Name is **Email Unsubscribe Form**



5. Select the **Flow** tab. Type `Change Program Status` in the search bar and drag out the **Change Program Status** filter with the following criteria:
    - Program: **Event Program Basic - ##**
    - New Status: **Webinar > Registered**



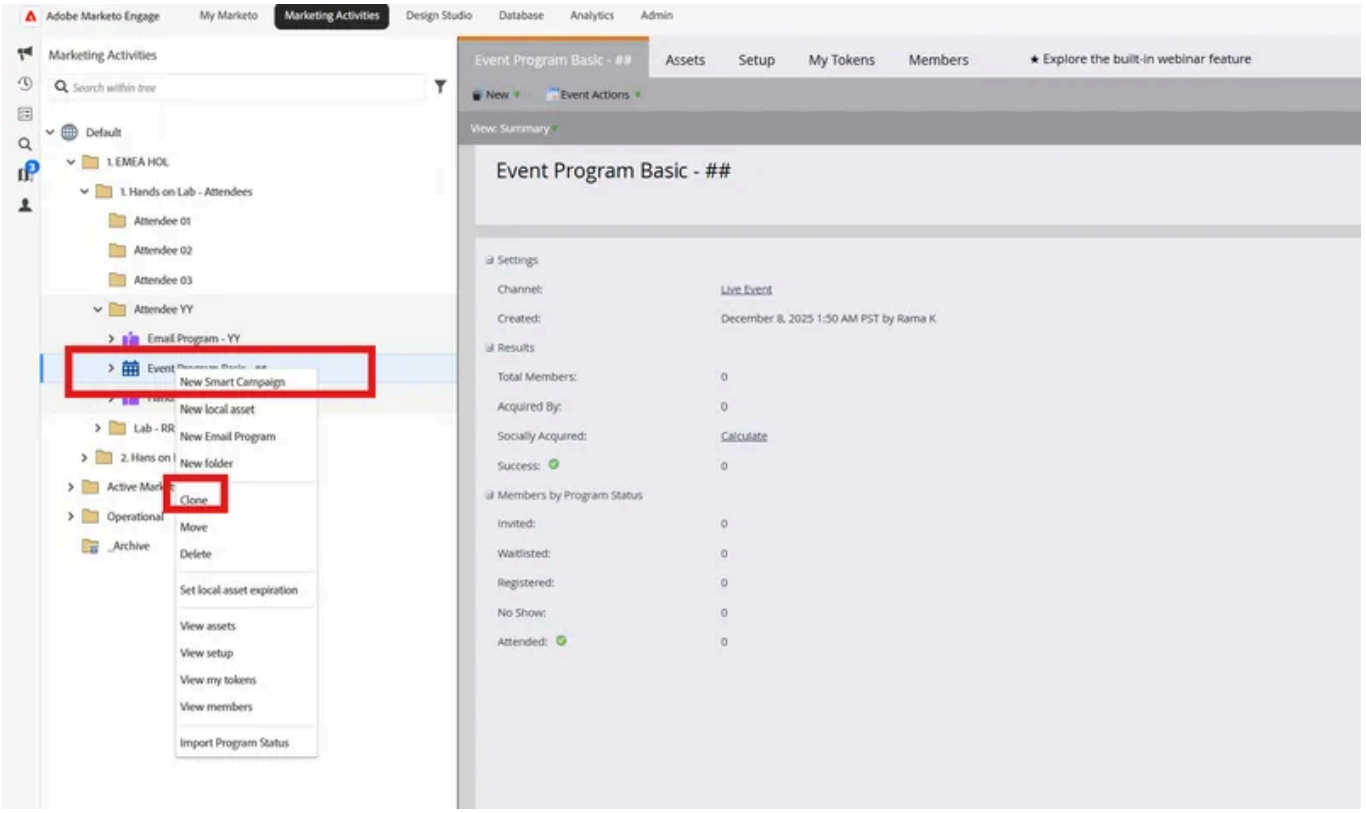
6. Select the **Schedule** tab, click the **Activate** button



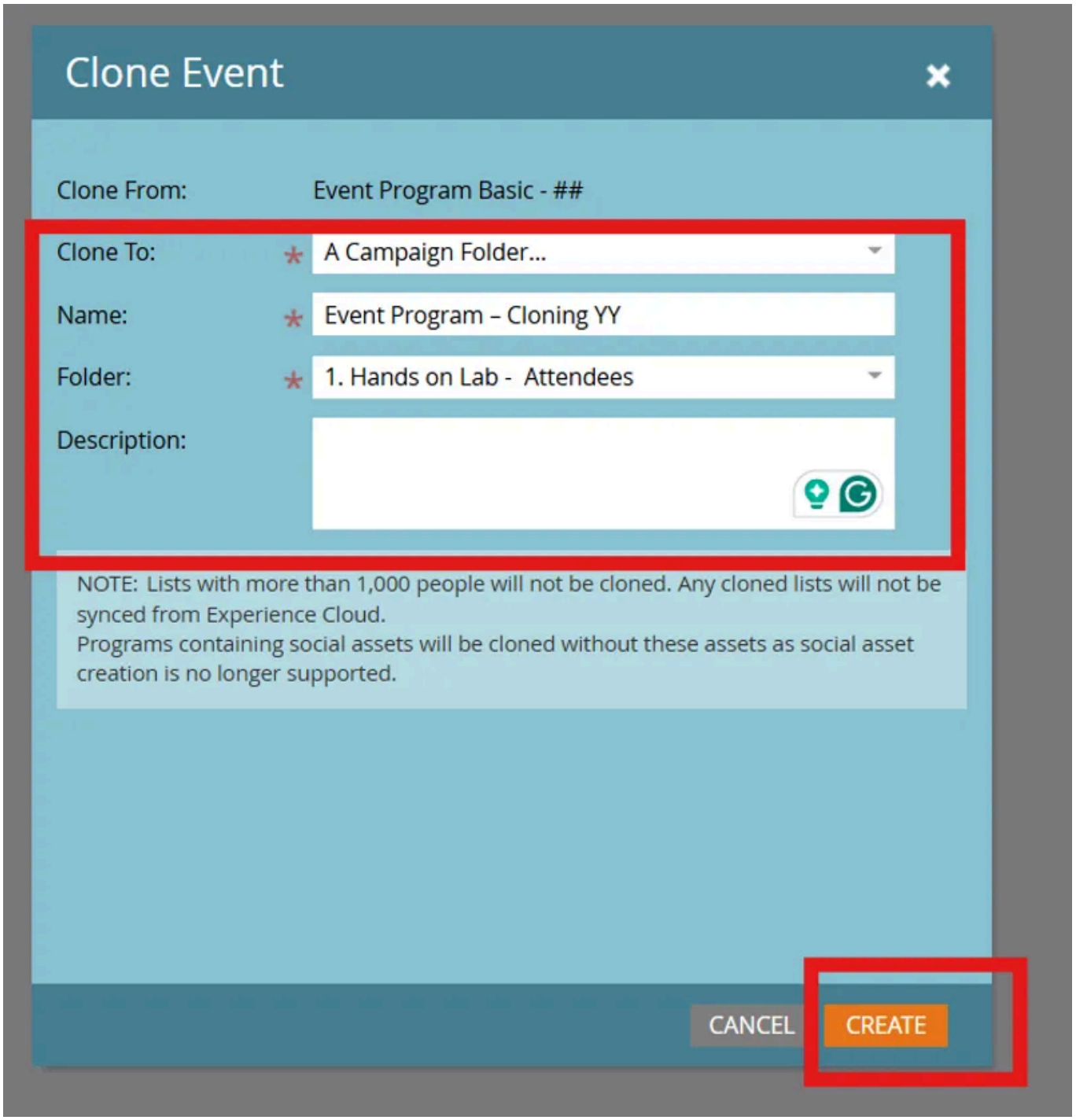
3.5.1.4. Event Program - Cloning

Clone Event Program

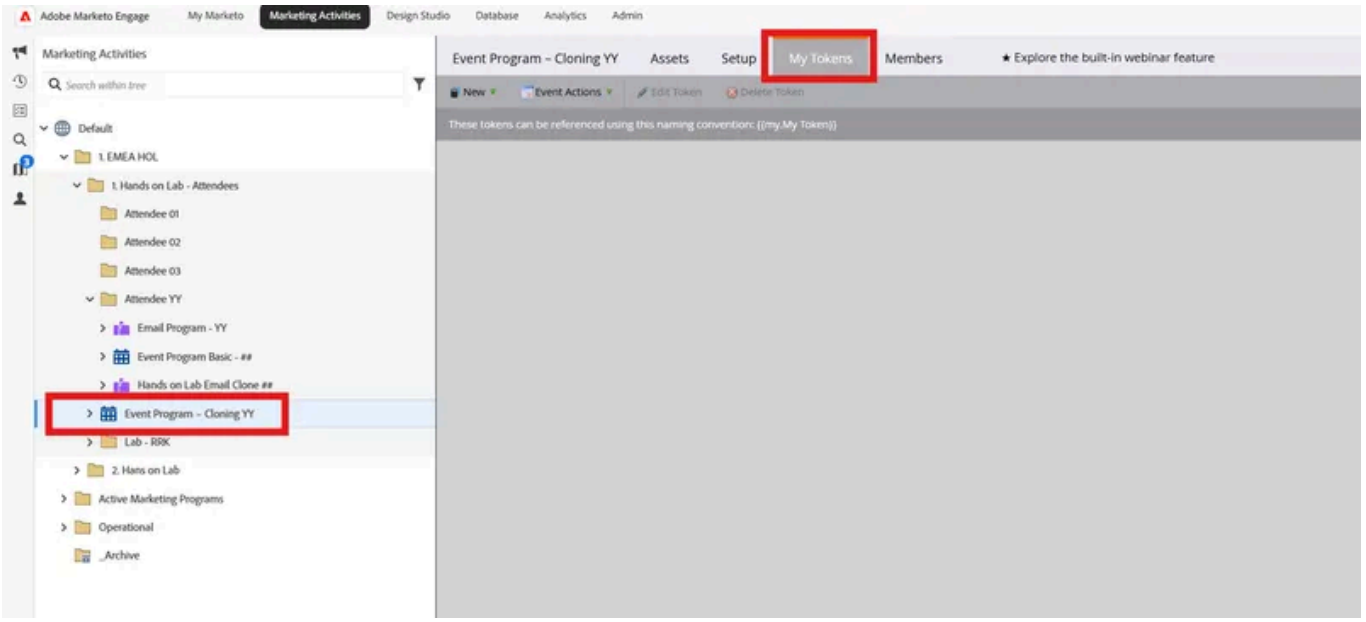
1. Right-click on the Event Program you just created before, select **Clone**



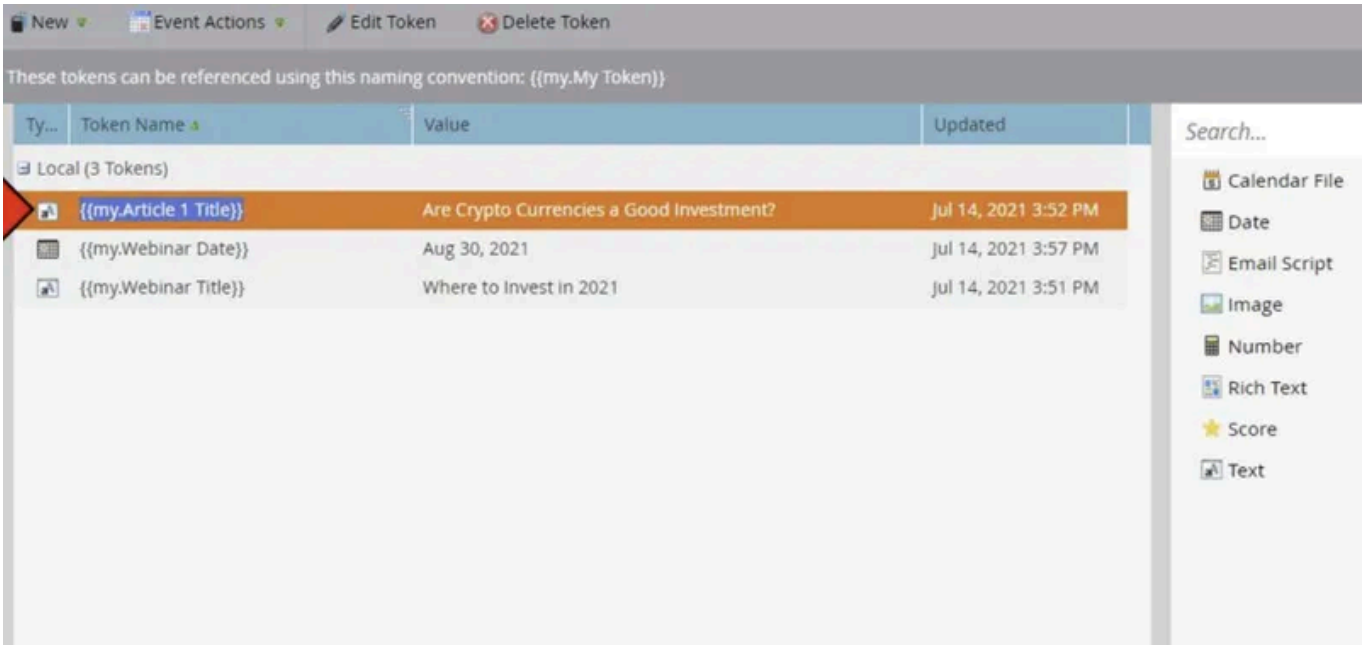
2. Click **Create** after the following fields have been filled out:
    - Clone To: `Attendee ## Folder`
    - Name: `Event Program – Cloning ##`
    - Folder: `Attendee - ##`
    - Description: Leave blank



3. Click on the **Event Program – Cloning Event** that you just created. Click on **My Tokens** tab

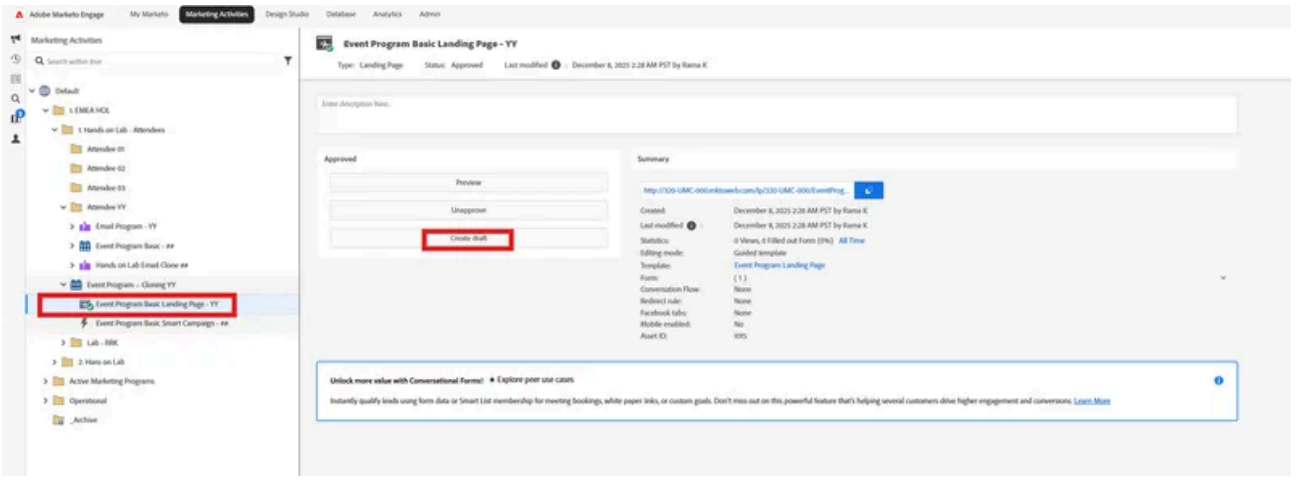


4. Create the Following Tokens:
    - Article 1 Title
    - Webinar Date
    - Webinar Title



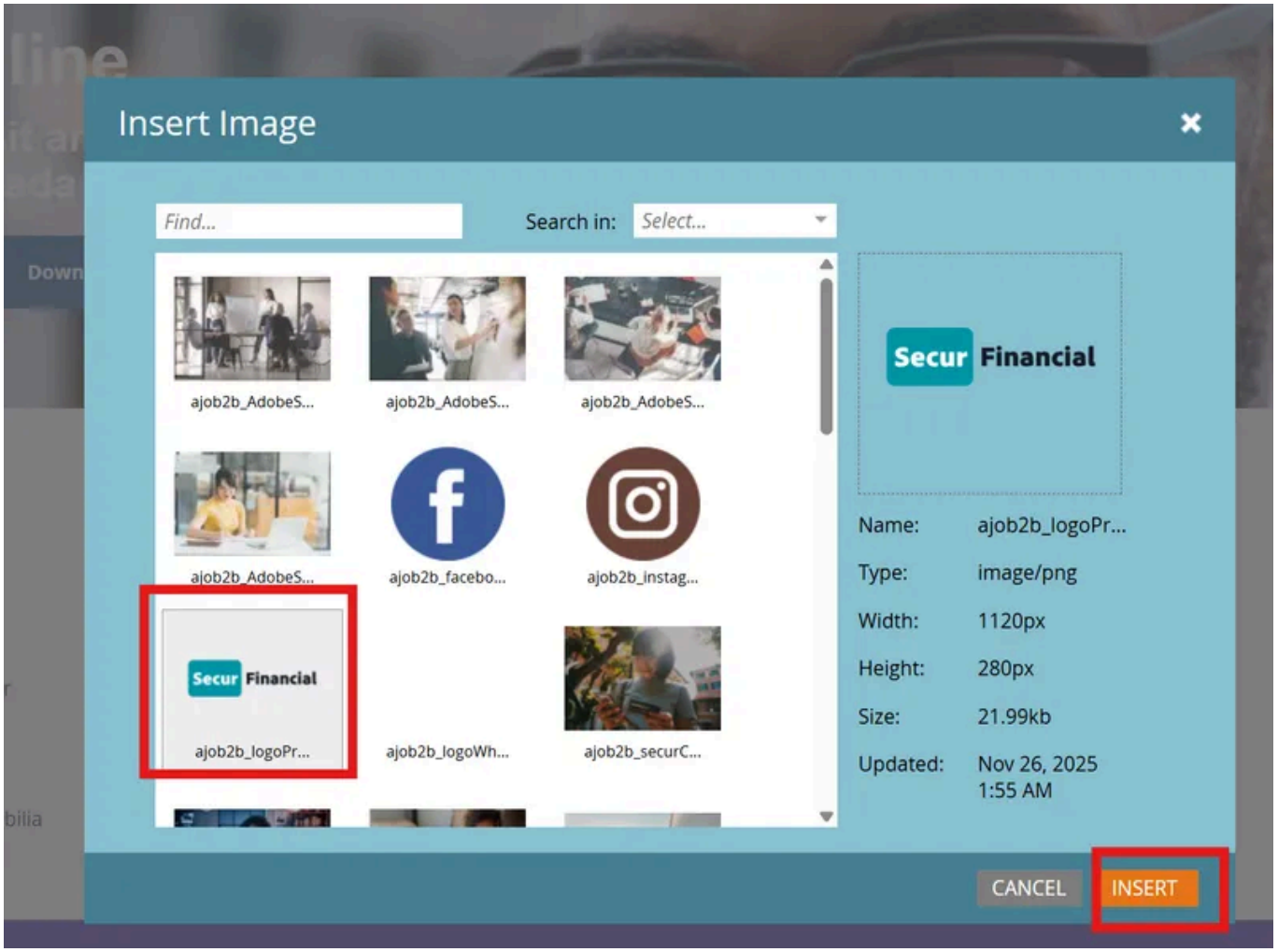
Edit/Customize Landing Page

1. Click on your program from the left navigation menu, select **Event Program Basic Landing Page - ##**
2. Click on **Create Draft**



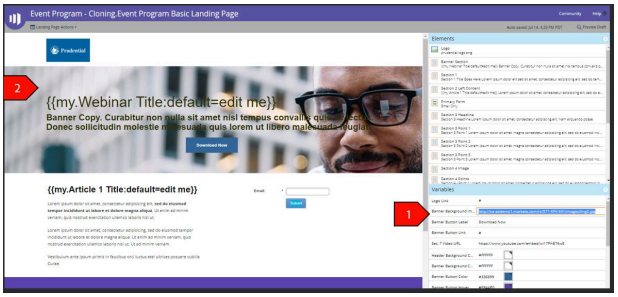
4. Areas that we are going to modify with tokens:
    - Logo
    - Banner Section

Double-click on the Logo. Select Secur Financial Logo.

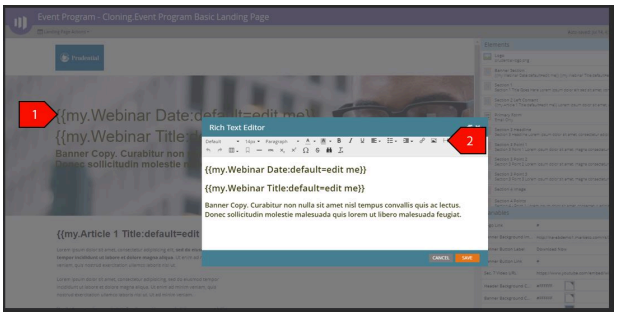


Change the Banner Background Image by inserting URL to the layout menu on the right in the **Banner Background** box

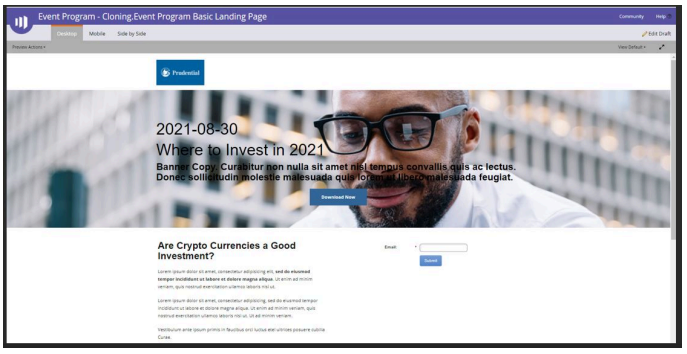
- **http://na-abdemo1.marketo.com/rs/377-XPV-931/images/img2.jpg**
-



Double-click on the Banner Section Headline. Highlight the Banner Section Headline Text and Click on the **Insert Token** Icon



Click on Preview to view the Modifications that the Tokens had on the Landing Page



4. Demo: Reporting

5. Demo: Marketo+CRM (Salesforce)