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Marketo and AI

MARKETO GROWTHOPS™

The Opportunity Checklist



Adobe Marketo Engage × CONTENTIM

Find out how much more Marketo can do for your team, and choose three priorities to plan what comes next.

For marketing operations teams, demand generation leads and the people who approve their plans.

TAKE THE ASSESSMENT.
SET YOUR PRIORITIES.

This short assessment covers ten areas that shape demand generation results in Marketo. For each one, it explains why it matters and what to measure.

By the end, you will have your answers to ten questions, three priorities with notes for your colleagues, and a technical check for your Marketo admin to complete.

Why now

Adobe is building AI into Marketo Engage through Coworker for Marketo Engage, previously called Marketo AI. Some of its skills explain, others take action, and all of them work to the rules and data you give them. Teams with documented standards, data they can trust and routine work already automated will get the most from it. People still review what it does.

How to complete it

1 Answer the questions. **Work through page 2 on your own.** It takes about ten minutes. Answer for how things are today, as you would to a colleague rather than to the board.

2 Understand your answers. **Pages 3 to 5 explain each area, give you one question to consider and list what to measure.** Change any answer that no longer feels right.

3 Choose your three priorities. **Page 6 gives you space to write why each one matters, ready to share with your team.**

4 Check your technical setup. **Pass page 7 to your Marketo admin.**

Prefer to talk it through?

Book a free 20-minute call and we will review your answers with you.

See page 9.

STEP 1. *ANSWER THE QUESTIONS*

What to do: Choose one answer for each question. Answer for how things are today.

Why: Your answers show what you want from Marketo and what is holding it back. They are the starting point for your three priorities.

Your goals

Where are you with each of these?

1. **More campaigns out of the door, without adding people.**
   - ◯ We have this ◯ A priority ◯ Not a priority
2. **Account-based targeting you can measure.**
   - ◯ We have this ◯ A priority ◯ Not a priority
3. **Campaigns live in days, not weeks.**
   - ◯ We have this ◯ A priority ◯ Not a priority
4. **Pipeline reporting that leadership can see, without building it by hand.**
   - ◯ We have this ◯ A priority ◯ Not a priority

The foundations behind your goals

How much of this is in place today?

5. **Do you have one documented way of building, covering naming, templates, program structure, workspaces, governance and QA standards?**
   - ◯ Yes ◯ Partly ◯ No
6. **Can you see and govern your data, including completeness, quality, duplicates, who owns each field and source, and who can access what?**
   - ◯ Yes ◯ Partly ◯ No
7. **Does automation handle the routine work, such as lifecycle, scoring, routing, alerts and checks?**
   - ◯ Yes ◯ Partly ◯ No
8. **Can sales see and act on what marketing sends, with lead quality defined in writing?**
   - ◯ Yes ◯ Partly ◯ No

Who does the work, and how?

9. **Are the Marketo skills you rely on held by more than one person?**
   - ◯ Yes ◯ Partly ◯ No
10. **Have you decided where you would use a partner: implementation, ongoing support or training?**
    - ◯ Yes ◯ Partly ◯ No

STEP 2. *UNDERSTAND YOUR ANSWERS*
Your goals

What to do: Read each area and check your answer. Then pick the three that matter most.

Why: These are your priorities. Use them to decide which foundations matter most.

1. More campaigns out of the door, without adding people

Output per person decides whether marketing grows with the business or struggles to keep up with demand. Coworker can take work off people, but only where structure and data are consistent, and with a person reviewing what it produces.

Question to consider: If your team had a fifth more time each quarter, what would you launch that is waiting today?

What to measure: campaigns live per quarter per person, hours of manual work per campaign, requests delivered in the quarter they were asked for.

Your answer:

◯ We have this ◯ A priority ◯ Not a priority

2. Account-based targeting you can measure

Account-based work is easy to promise and hard to prove, because reporting has to hold accounts, contacts, engagement and opportunities in one place. Once it does, sales conversations move from lead counts to which accounts are warming up.

Question to consider: Could you name the ten most engaged target accounts this quarter, and the pipeline they have produced?

What to measure: engaged accounts in the target list, buying group coverage, meetings and pipeline from target accounts.

Your answer:

◯ We have this ◯ A priority ◯ Not a priority

3. Campaigns live in days, not weeks

Slow launches miss the moment and keep the team on the last request rather than the next one. Coworker can now draft a program from your template and check it against your rules, leaving people to review the logic and make the judgement calls.

Question to consider: Where does a typical campaign wait longest: the build, approvals, QA or data?

What to measure: time from brief to live, build and check cycles per campaign, errors found after launch.

Your answer:

◯ We have this ◯ A priority ◯ Not a priority

4. Pipeline reporting that leadership can see, without building it by hand

Reporting assembled by hand arrives late, is open to challenge and limits what marketing is trusted to own. Standing reporting changes the conversation with finance and sales from cost to return and protects the budget when the year gets tight.

Question to consider: When leadership asks what marketing contributed last quarter, how long does the answer take, and do people accept it?

What to measure: pipeline and revenue with marketing contribution, cost per qualified lead, hours per reporting cycle.

Your answer:

◯ We have this ◯ A priority ◯ Not a priority

The foundations behind your goals

What to do: Check your answer for each area, then think about which of your priorities depends on it.

Why: An area answered Partly or No that one of your priorities depends on is a gap to close first. Those links make your business case.

5. One documented way of building

Naming, templates, program structure, workspaces and QA standards let two people work in the same Marketo setup without creating a third way of doing things. Written into Organizational Rules, the same standards guide Coworker when it builds and checks a program.

Question to consider: Could a new team member build a program to your standards using only what is written down?

What to measure: programs passing validation first time, errors found after launch, new starter time to first independent build.

Your answer:

◯ Yes ◯ Partly ◯ No

6. Data you can see and govern

Completeness, quality, duplicates and a named owner for each field and source decide what any AI-enabled workflow can do. Coworker works within each user's existing permissions, so knowing what data it can reach matters as much as cleaning it.

Question to consider: If Coworker imported a list tomorrow, would you know which fields it should fill and who owns them?

What to measure: data completeness and quality, duplicate rate, fields and sources with a named owner, usable records as a share of license count.

Your answer:

◯ Yes ◯ Partly ◯ No

7. Automation handling the routine work

Lifecycle, scoring, routing, alerts and checks happen whether or not anyone has time, so they should not depend on someone being free. Writing the rules down now also decides how much you can hand to Coworker later.

Question to consider: Which routine tasks stop when the person who usually does them is on leave?

What to measure: hours on manual tasks, speed to lead, routing errors, campaigns waiting on a person.

Your answer:

◯ Yes ◯ Partly ◯ No

8. Sales able to see and act on what marketing sends

Most arguments about lead quality are really about definitions, and they are settled by writing the definition down and reporting against it. Marketing activity visible in the CRM turns follow-up from a chase into a routine.

Question to consider: Do sales and marketing use the same definition of a qualified lead, and is it written down?

What to measure: follow-up time on new leads, MQL to SQL rate, lead rejection rate.

Your answer:

◯ Yes ◯ Partly ◯ No

Your team and support

What to do: Check your answer for each area.

Why: This part decides how the work gets done: by your own team, with a partner, or both.

9. Marketo skills held by more than one person

Many teams rely on one person who knows how scoring, lifecycle and integrations really work, which makes holidays difficult and a resignation costly. Spreading that knowledge costs less than replacing it.

Question to consider: If your most experienced Marketo person left next month, what would stop working?

What to measure: people able to build independently, work paused when one person is away, processes documented.

Your answer:

◯ Yes ◯ Partly ◯ No

10. A clear view on where a partner fits.

Implementation, ongoing support and training are three different things, and combining them in one brief makes an engagement harder to get right. Deciding which you need, and what your team should be able to do at the end, makes any partner easier to hold to account.

Question to consider: What would you want your own team to be able to do at the end of a partner engagement?

What to measure: time to value on a project, skills retained after handover, cost against hiring for the same skills.

Your answer:

◯ Yes ◯ Partly ◯ No

STEP 3. *CHOOSE YOUR THREE PRIORITIES*

What to do: Pick the three areas to tackle first, then write notes for your colleagues.

Why: Three is enough to make progress and to agree with your team.

A strong priority is often a goal you answered “A priority” alongside a foundation you answered Partly or No.

Priority 1

Area	Why it matters to us	Notes for colleagues

Priority 2

Area	Why it matters to us	Notes for colleagues

Priority 3

Area	Why it matters to us	Notes for colleagues

STEP 4. *CHECK YOUR TECHNICAL SETUP*

Technical checks for your Marketo admin

What to do: Pass this page to whoever runs Marketo and ask them to answer the six checks below.

Why: These settings decide whether Coworker can work for you at all, so check them before you plan anything that relies on it.

What Adobe has changed, as of October 2026

Coworker for Marketo Engage is available to all subscriptions once your organization has accepted Adobe's Core Gen-AI and supplemental terms. If the tile is missing from My Marketo, ask your account manager.

Some skills explain without changing anything. Investigate Leads shows why a person did not reach MQL, and Product Knowledge answers how-to questions from Adobe's documentation.

Others take action. Import Leads maps fields, normalizes and deduplicates a list before importing it. Build Programs creates a program from a brief, using one of your existing programs as the template. You confirm the plan before it builds, then finish the campaign logic and content yourself.

Organizational Rules hold your standards in one document: naming, folder structure, required tokens, compliance and exclusion rules. Build Programs, Plan Campaigns and Validate Programs all work to them. Every instance starts with a default set, which is worth reviewing.



Validate Programs scores a program against those rules before launch. It does not check Smart List filters, flow step logic, dynamic content, email rendering or brand tone, so full QA still needs a person.

Coworker sees only what each user can already see, including workspace, partition and field permissions. The Access Coworker permission is off by default for Marketing User and custom roles. The AI Assistant permission in the email designer is also off by default.

For teams using Predictive Audiences, Marketo shows Data Completeness and Data Quality for each model under Admin, in Models and Data Health.

Coworker brings AI into Marketo. The Marketo Engage MCP server, now generally available, works the other way. MCP (Model Context Protocol) is an open standard for connecting AI tools to other systems, so your team can work in Marketo from the AI tools it already uses, such as Claude, ChatGPT or Gemini.

Adobe hosts the server, so there is nothing to install. It covers more than 100 actions across programs, smart campaigns, leads, emails and lists, and only allows actions that do not delete anything. Your Marketo admin needs to enable API access and set up credentials before anyone can connect.

Marketo Qualifier is a new AI-first application for business development representatives (BDRs). It ranks prospects using engagement signals from Marketo Engage and your CRM, gathers research on each account, and drafts personalized outreach across email and LinkedIn for the BDR to edit or send. It connects to Salesforce or Microsoft Dynamics 365 and is licensed per BDR.

The six checks

A. Is your subscription migrated to Adobe IMS, with users managed in the Adobe Admin Console?

◯ Yes ◯ No ◯ Not sure

B. Is Coworker for Marketo Engage enabled, with the tile showing on My Marketo?

◯ Yes ◯ No ◯ Not sure

C. Have the Core Gen-AI terms and supplemental terms been accepted?

◯ Yes ◯ No ◯ Not sure

D. Is the Access Coworker permission given to the roles that need it, and only those?

◯ Yes ◯ No ◯ Not sure

E. Is the Access AI Assistant permission given for the email designer?

◯ Yes ◯ No ◯ Not sure

F. Have your Organizational Rules been reviewed and edited to match your own standards?

◯ Yes ◯ No ◯ Not sure

NEXT STEPS

What to do: Share your priorities with your team and agree which to turn into a project. Ask your Marketo admin to complete the technical checks, so you know whether your setup supports them.

Why: A second view often confirms the priorities you have and finds one you missed. The technical picture may help identify gaps preventing you from achieving your goals.

Review your assessment with us

We offer a 20-minute call for teams working through this assessment. Bring your answers and your three priorities, and we will talk through what we would do first and why. Afterwards you get a short, written follow-up with our thinking. There is no charge and no obligation, and you are free to use the thinking and do the work yourselves.

About Contentim

We are a Swiss company working with international B2B organizations. We started in content and demand generation for technical products, and marketing operations grew out of that work. That is why we look at the whole picture rather than the platform on its own.

Where we help

Assessment of platform health, campaign maturity, operations, data, reporting and AI readiness, with a prioritized plan for the first 90 days.

Implementation, instance redesign, migration and CRM integration.

Campaign operations as an extension of your team, including nurture, webinars, events and account-based programs.

Optimization, managed services, training and hands-on coaching for in-house teams.

Track record

More than 600 campaigns delivered for enterprise marketing teams, across multiple languages and brands.

Senior certified Marketo specialists, with Champion-standard expertise, leading every engagement.

Clients in MedTech, chemicals and materials, industrial manufacturing and enterprise software.

Teams across Europe and India, so senior thinking and delivery capacity come from the same place.

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Book the 20-minute call



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