



# A ***Sprinkel***-ing of Tips, Tricks and Hacks from My 15-year MOPs Career

October 2025

# Todd Sprinkel

Principal Solution Architect at Sponge.io

[linkedin.com/in/todd-sprinkel/](https://linkedin.com/in/todd-sprinkel/)



# How to get FREE Help From Experts

General



General MOPs

Excel



Useful Excel  
formulas and other  
tips

HubSpot/Marketo



All about the MAPs

Salesforce



Sample formulas,  
browser extensions,  
reporting hacks, and  
other handy advice



How to ask for help  
when you're stuck and  
actually get it

# General MOPs

**Always plan for scale .**  
**Spend 8 hours now to save**  
**yourself 10 minutes 100**  
**times .**





General MOPs

## Pro Tips

1. Use ISO 8601 Date Formats (e.g. 2025-10-29)



General MOPs

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2. Wait steps to allow X to happen - DON'T DO THIS



## General MOPs

### Pro Tips

1. Use ISO 8601 Date Formats (e.g. 2025-10-29)
2. Wait steps to allow X to happen - DON'T DO THIS
3. Indent your formulas and code
  - a. You can even add `/*Comments*/` to your Salesforce formulas
  - b. Config block +  
`/******DO NOT TOUCH BELOW THIS LINE*****/`



## General MOPs

### Pro Tips

#### Option 1

```
CASE(MONTH(LastActivityDate),1,"January",2,"February",3,"March",4,"April",5,"May",6,"June",7,"July",8,"August",9,"September",10,"October",11,"November",12,"December","None")
```

#### Option 2

## General MOPs

### Pro Tips

#### Option 1

```
CASE(MONTH(LastActivityDate),1,"January",2,"February",3,"March",4,"April",5,"May",6,"June",7,"July",8,"August",9,"September",10,"October",11,"November",12,"December","None")
```

#### Option 2

```
/*Returns Name of the Month of LastActivityDate*/  
CASE(  
    MONTH(LastActivityDate),  
    1,"January",  
    2,"February",  
    3,"March",  
    4,"April",  
    5,"May",  
    6,"June",  
    7,"July",  
    8,"August",  
    9,"September",  
    10,"October",  
    11,"November",  
    12,"December",  
    "None"  
)
```

# General MOPs

## Pro Tips

```
//required inputs
const identityURL = "https://123-ABC-456.mktoforest.com/identity";
const restURL = "https://123-ABC-456.mktoforest.com/rest"
const clientId = "some-client-id";
const clientSecret = "some-client-secret";
const leadFormFields = {
  //use REST API Name for fields
  //email is required
  "email": "test@example.com"
};
const formId = 1002;

//optional inputs
//if not passing an input, do NOT delete the line or comment it out, just use an empty value
//e.g. const pageUrl = "";
const pageUrl = "https://example.com";
const queryString = "abc=123&def=456";
const leadClientIpAddress = "192.168.0.1";
const userAgentString = "Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/90.0.4430.93 Safari/537.36";
const cookieValue = {{lead.Marketo Munchkin Tracking Cookie}};

/***** DO NOT TOUCH BELOW THIS LINE *****/

const obtainAccessToken = identityURL+"/oauth/token?grant_type=client_credentials&client_id="+clientId+"&client_secret="+clientSecret;
const submitForm = restURL+"/v1/leads/submitForm.json";

function buildRequest(){
  var req = {};
  req.formId = formId;
  var input = [{"leadFormFields":leadFormFields,"cookie":cookieValue}]
  var visitorData = {};
  if(pageUrl) {
    visitorData.pageUrl = pageUrl;
  }
  if(queryString){
    visitorData.queryString = queryString;
  }
  if(leadClientIpAddress){
    visitorData.leadClientIpAddress = leadClientIpAddress;
  }
  if(userAgentString){
    visitorData.userAgentString = userAgentString;
  }
  input[0].visitorData = visitorData;
  req.input = input;
```



## General MOPs

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4. Thou Shalt Not Develop in Production - Use a sandbox



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  - a. You can even add `/*Comments*/` to your Salesforce formulas
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```
/******DO NOT TOUCH BELOW THIS LINE*****/
```
4. Thou Shalt Not Develop in Production - Use a sandbox
5. Use global forms

The background features a diagonal split between a deep purple on the left and a vibrant orange on the right. Overlaid on this are several semi-transparent geometric shapes, including a large purple triangle pointing towards the bottom-left and a smaller orange shape in the top-right corner.

# Excel

Excel

## Date to ISO 8601 String

- `=TEXT(A2,"yyyy-mm-dd")`

|    |            |            |   |   |           |                        |
|----|------------|------------|---|---|-----------|------------------------|
| B2 |            | :          | ✕ | ✓ | <i>fx</i> | =TEXT(A2,"yyyy-mm-dd") |
|    | A          | B          | C | D | E         |                        |
| 1  | Date       | Text       |   |   |           |                        |
| 2  | 10/22/2025 | 2025-10-22 |   |   |           |                        |
| 3  |            |            |   |   |           |                        |
| 4  |            |            |   |   |           |                        |
| 5  |            |            |   |   |           |                        |
| 6  |            |            |   |   |           |                        |

## Excel Useful Keyboard Shortcuts

| Shortcut         | Action                                       |
|------------------|----------------------------------------------|
| CTRL+D/CTRL+R    | Fill Down/Right                              |
| CTRL+Down        | Go To Bottom of Column                       |
| CTRL+Shift+Down  | Highlight to Bottom of Column                |
| CTRL+Shift+V     | Paste Special Values                         |
| CTRL+Alt+V (V/E) | Paste Special (Values/Transpose)             |
| F2               | Edit Cell Formula (and Highlight References) |
| F4               | Toggle Relative/Absolute References          |



Excel

## Is Dupe?

- `=IF(A2=A1,1,0)`
- Requires sorting based on unique identifier column
- Can be expanded to support duplicates across multiple columns
- Can be flipped to return "Is Unique?" by changing operator to `<>`

| B2             |         |          |   |   |   |
|----------------|---------|----------|---|---|---|
| =IF(A2=A1,1,0) |         |          |   |   |   |
|                | A       | B        | C | D | E |
| 1              | Item    | Is Dupe? |   |   |   |
| 2              | Thing 1 | 0        |   |   |   |
| 3              | Thing 1 | 1        |   |   |   |
| 4              | Thing 2 | 0        |   |   |   |
| 5              |         |          |   |   |   |

Excel

## In Other List?

- `=IF(ISNUMBER(MATCH(A2,D:D,0)),1,0)`
- Useful for comparing records between two systems (e.g. MAP and CRM, List Import vs. List Export)

| B2 |          | ✕ ✓ <i>fx</i>  |   | =IF(ISNUMBER(MATCH(A2,D:D,0)),1,0) |   |   |   |  |
|----|----------|----------------|---|------------------------------------|---|---|---|--|
|    | A        | B              | C | D                                  | E | F | G |  |
| 1  | Item     | In Other List? |   | Other List                         |   |   |   |  |
| 2  | Thing 1  | 1              |   | Thing 1                            |   |   |   |  |
| 3  | Thing 74 | 0              |   | Thing 2                            |   |   |   |  |
| 4  |          |                |   | Thing 3                            |   |   |   |  |
| 5  |          |                |   | Thing 4                            |   |   |   |  |
| 6  |          |                |   | Thing 5                            |   |   |   |  |
| 7  |          |                |   | Thing 6                            |   |   |   |  |
| 8  |          |                |   | Thing 7                            |   |   |   |  |
| 9  |          |                |   | Thing 8                            |   |   |   |  |
| 10 |          |                |   | Thing 9                            |   |   |   |  |
| 11 |          |                |   | Thing 10                           |   |   |   |  |
| 12 |          |                |   |                                    |   |   |   |  |

## Get List of Related Records

- =TEXTJOIN(" ",TRUE,FILTER(E:E,A2=D:D))
- Excel-ify common database operation
- Get List of Contact IDs related to Accounts, Campaign Members related to Contacts/Leads, etc.
- Use any delimiter you want
- Can also go the other way with PowerQuery to flatten data

B2

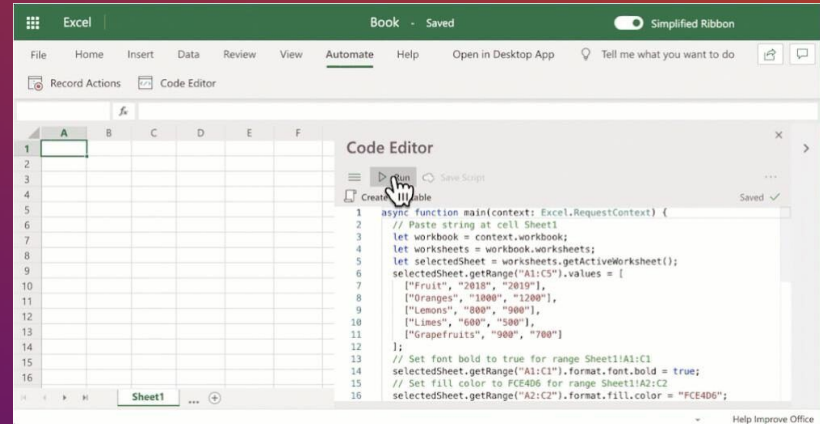
✖ ✓  $f_x$

=TEXTJOIN(", ", TRUE, FILTER(E:E, A2=D:D))

|    | A            | B                | C | D           | E          | F | G |
|----|--------------|------------------|---|-------------|------------|---|---|
| 1  | Object 1 IDs | Related IDs List |   | Object 1 ID | Related ID |   |   |
| 2  |              | 1 A,B,C          |   | 1           | A          |   |   |
| 3  |              | 2 D,E            |   | 1           | B          |   |   |
| 4  |              | 3 F              |   | 1           | C          |   |   |
| 5  |              | 4 G,H,I          |   | 2           | D          |   |   |
| 6  |              |                  |   | 2           | E          |   |   |
| 7  |              |                  |   | 3           | F          |   |   |
| 8  |              |                  |   | 4           | G          |   |   |
| 9  |              |                  |   | 4           | H          |   |   |
| 10 |              |                  |   | 4           | I          |   |   |
| 11 |              |                  |   |             |            |   |   |

# Excel Office Scripts

- Great for repetitive work
- Like Macros, but in a more familiar syntax TypeScript
- <https://sponge.io/office-scripts-a-smarter-way-to-automate-excel-tasks/>

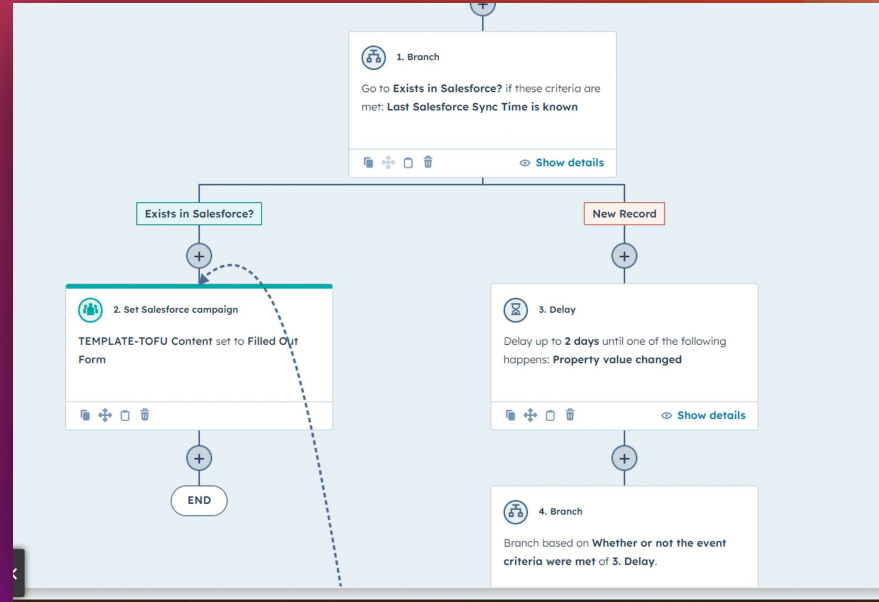


**Marketo/HubSpot**

Marketo/HubSpot

## HubSpot - Verify Sync to SFDC Before Adding to Campaign

- Create branch on Last Salesforce Sync Time is known
- Delay up to X amount of time or until Property value changed
- Continue/Send Notification



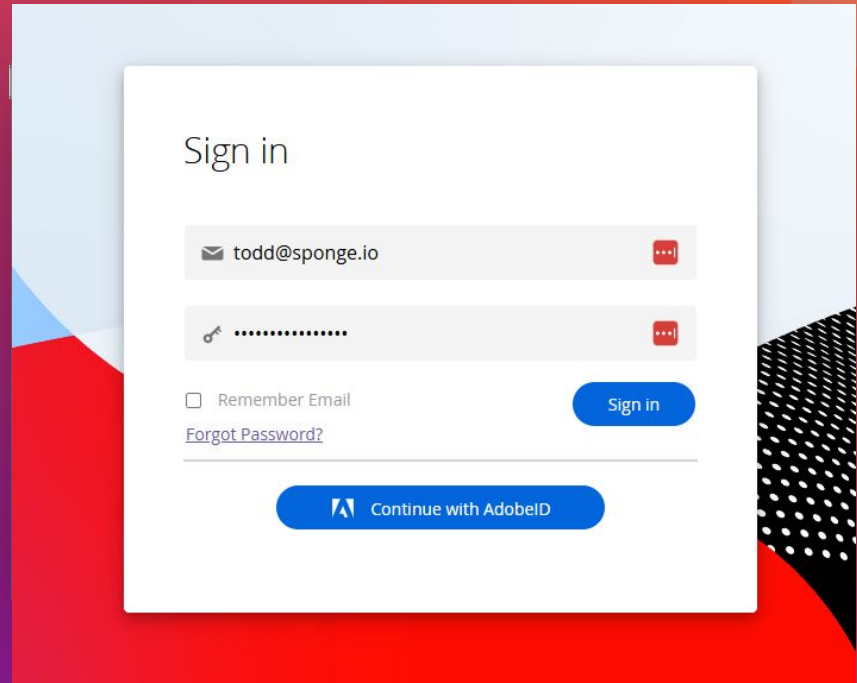
## Marketo/HubSpot HubSpot Advanced Logic

- No more duplicating logic groups!
- Still not as flexible as (1 OR 2) AND 3 style logic, but a MASSIVE improvement for HS admins
- Previously had to do things like:  
(First Name contains S  
AND Title contains Manager)  
OR  
(Last Name contains S  
AND Title contains Manager)

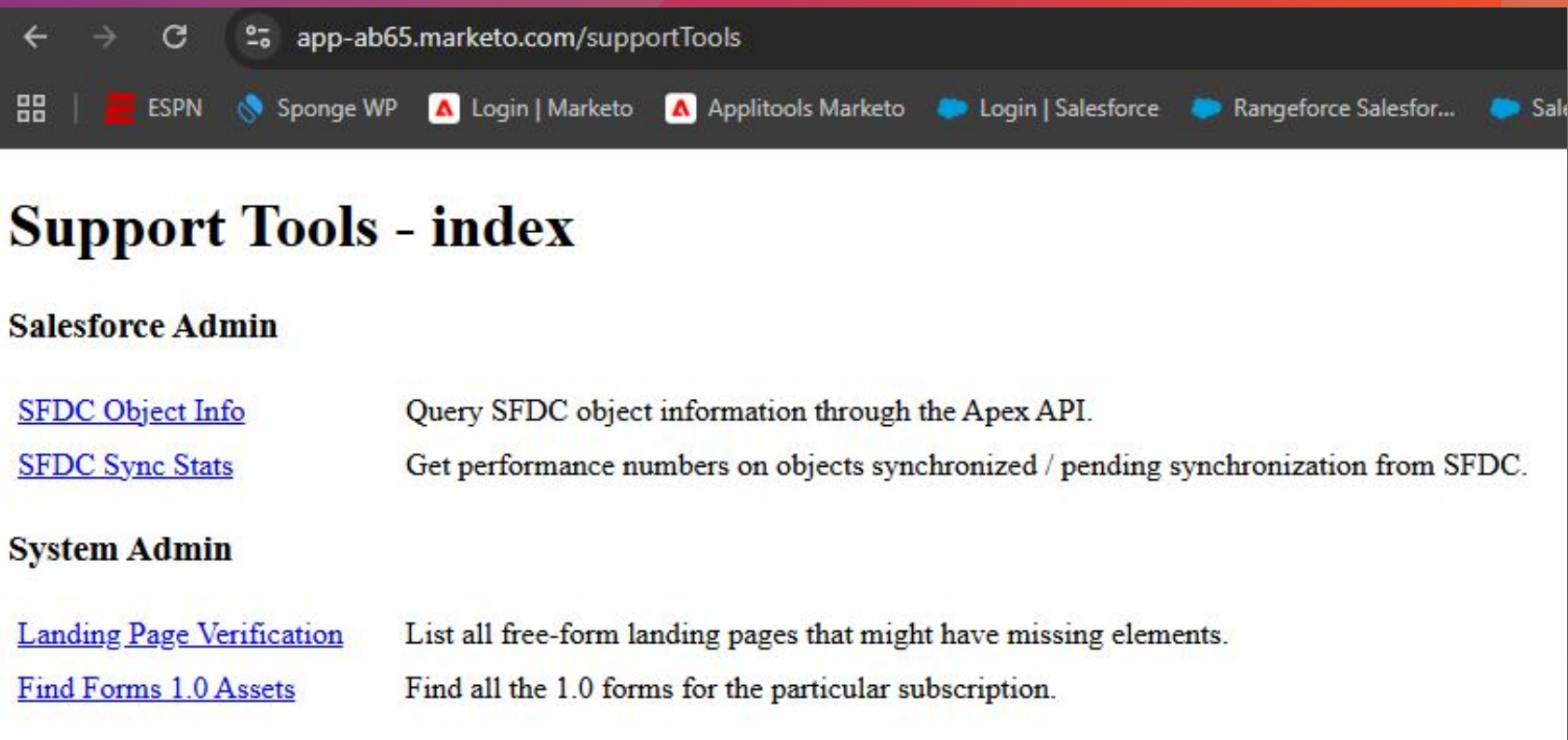
The screenshot shows the HubSpot Advanced Logic builder interface. At the top, it says 'Include' with a dropdown menu set to 'Contacts' and a link to 'Change object'. To the right is a 'Test matches' toggle switch. Below this, there are two main logic groups. 'Group 1' contains two filters: 'First name contains any of s' and 'Last name contains any of s', connected by an 'or' operator. Below Group 1 is an 'and' operator. 'Group 2' contains one filter: 'Job title contains any of Manager'. Below Group 2 is an 'and' operator and a '+ Add filter group' button. Each filter has a trash icon to its right.

## Marketo/HubSpot Marketo Direct Link

- <https://app-ab35.marketo.com/leadDatabase/loadLeadDetail?leadId=221&accessZonId=1>
- Double click into any Contact record from Lead Database (<https://app-ab35.marketo.com/homepage/xdLogin?xOrigin>)
- ...?
- Profit!







The screenshot shows a web browser window with the address bar displaying 'app-ab65.marketo.com/supportTools'. The browser's tab bar shows several open tabs: 'ESPN', 'Sponge WP', 'Login | Marketo', 'Applitoools Marketo', 'Login | Salesforce', 'Rangeforce Salesfor...', and 'Sale...'. The main content area of the browser displays the 'Support Tools - index' page. The page has a white background with black text. It features a main heading 'Support Tools - index' in a large, bold, serif font. Below this heading, there are two sections: 'Salesforce Admin' and 'System Admin', both in bold, black, sans-serif font. Under 'Salesforce Admin', there are two links: 'SFDC Object Info' and 'SFDC Sync Stats', both in blue, underlined, sans-serif font. To the right of each link is a description of the tool's function. Under 'System Admin', there are two links: 'Landing Page Verification' and 'Find Forms 1.0 Assets', both in blue, underlined, sans-serif font. To the right of each link is a description of the tool's function.

## Support Tools - index

### Salesforce Admin

|                                  |                                                                                      |
|----------------------------------|--------------------------------------------------------------------------------------|
| <a href="#">SFDC Object Info</a> | Query SFDC object information through the Apex API.                                  |
| <a href="#">SFDC Sync Stats</a>  | Get performance numbers on objects synchronized / pending synchronization from SFDC. |

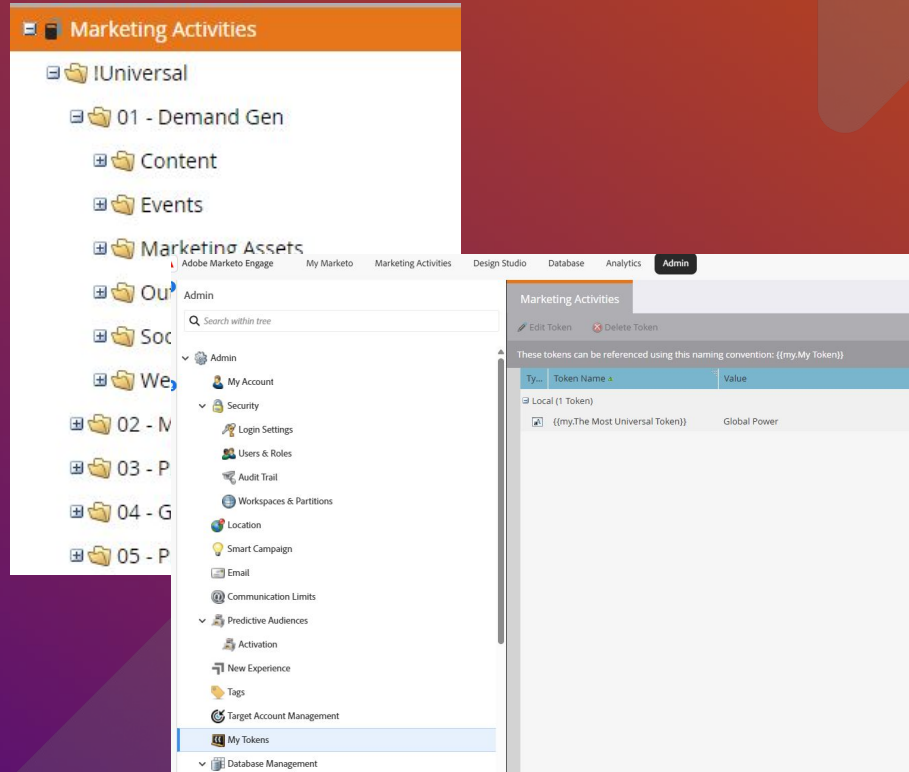
### System Admin

|                                           |                                                                    |
|-------------------------------------------|--------------------------------------------------------------------|
| <a href="#">Landing Page Verification</a> | List all free-form landing pages that might have missing elements. |
| <a href="#">Find Forms 1.0 Assets</a>     | Find all the 1.0 forms for the particular subscription.            |

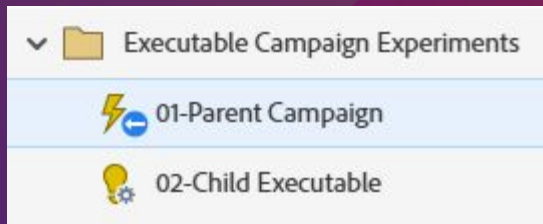
# Marketo/HubSpot

## Marketo Global Tokens

- Relatively New Feature
  - Use for common items (e.g. Company Name, Copyright Year, Logo URLs, Company Address, etc.)
- Still doesn't work for Assets in Design Studio
- Avoids an unnecessary folder in your tree



## Marketo Executable vs Requestable - Do or Queue



- Synchronous vs. Asynchronous Processing - DO or QUEUE
- Do I need this RIGHT NOW?
- Or can queue because I don't care when it finishes?
- Think of Executables like functions. Reusable pieces of processing that you can call from anywhere and guarantee that it has finished before moving on.

## Marketo/HubSpot More from MOPs Friends

- Chloe Pott:  
<https://pocketnibbles.com/marketing-ops-insights/snack-sized-marketo-tips-from-freelance-life/>
- Sanford Whiteman's Blog:  
<https://blog.teknkl.com/>
- Jack Segal's Blog:  
<https://www.netspinnr.com/page/1>
- RevOpsFM (Justin Norris):  
<https://revopsfm.substack.com/>

The screenshot shows a configuration window titled "1 - Change Data Value". It contains a list of choices for a data value change. Choice 1 is selected. Choice 2 is highlighted with a pink box, and a context menu is open over it with options: Move Up, Move Down, Move To, and Remove. The context menu has a blue background and white text. Below the choices is a "Default Choice" section. At the bottom right, there is a note: "Note: Only the first matching choice applies".

1 - Change Data Value

Add Choice

Choice 1 ▼

If: Member of Smart List in

Attribute: Persona New Value:

Choice 2 ▼

Move Up

Move Down

Move To

Remove

Member of Smart List in

Persona New Value:

If: Member of Smart List in

Attribute: Persona New Value:

Default Choice

Attribute: Persona New Value: Other

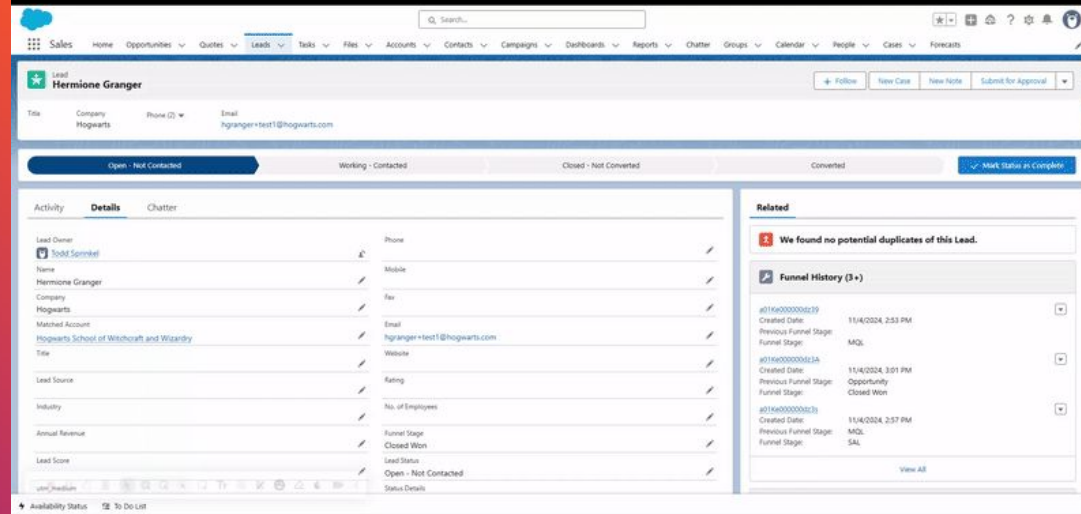
Note: Only the first matching choice applies

The background features a diagonal gradient from deep purple on the left to bright orange on the right. Abstract, semi-transparent geometric shapes, including triangles and polygons, are layered across the background, creating a modern, dynamic feel. The word "Salesforce" is prominently displayed in the center-left area.

**Salesforce**

# Salesforce Inspector Reloaded

- Get this [Browser Extension](#)
- [Salesforce Ben Guide](#)
- Field API Names, See All Data, Data Import/Export, Shortcuts, etc.



Salesforce

# UnofficialSF

- Unofficial AppExchange
- [Flow Datetime Methods](#)
- [Send Better Email](#)
- [Get Records IN](#)

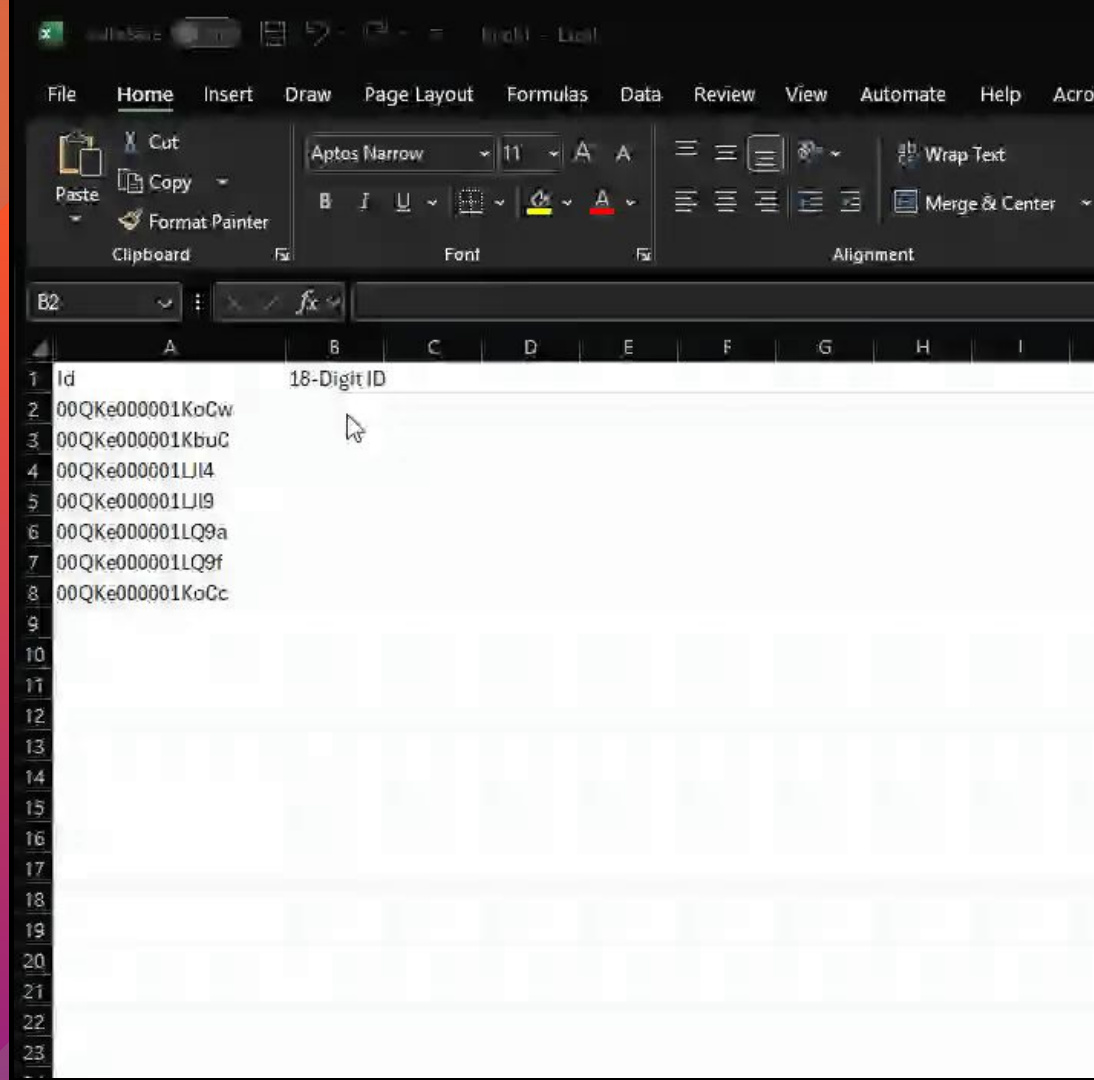
***UNOFFICIAL SF***



Salesforce

## 15-to-18 Digit IDs

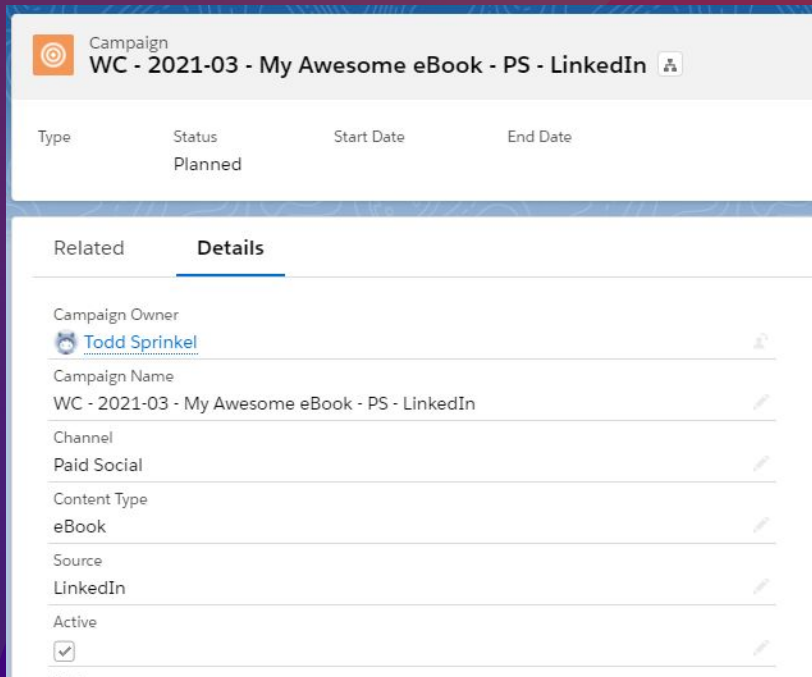
- [Excel Formula](#)
- [Google Sheets](#)
- [Online Converter](#)
- You can also create a formula field CASESAFEID( Id )
- Case-sensitive vs. case-insensitive (VLOOKUP is case-insensitive)





# Salesforce Campaign Structure

## Option 1



**Campaign**  
**WC - 2021-03 - My Awesome eBook - PS - LinkedIn**

| Type | Status  | Start Date | End Date |
|------|---------|------------|----------|
|      | Planned |            |          |

**Related** | **Details**

Campaign Owner  
 [Todd Sprinkel](#)

Campaign Name  
WC - 2021-03 - My Awesome eBook - PS - LinkedIn

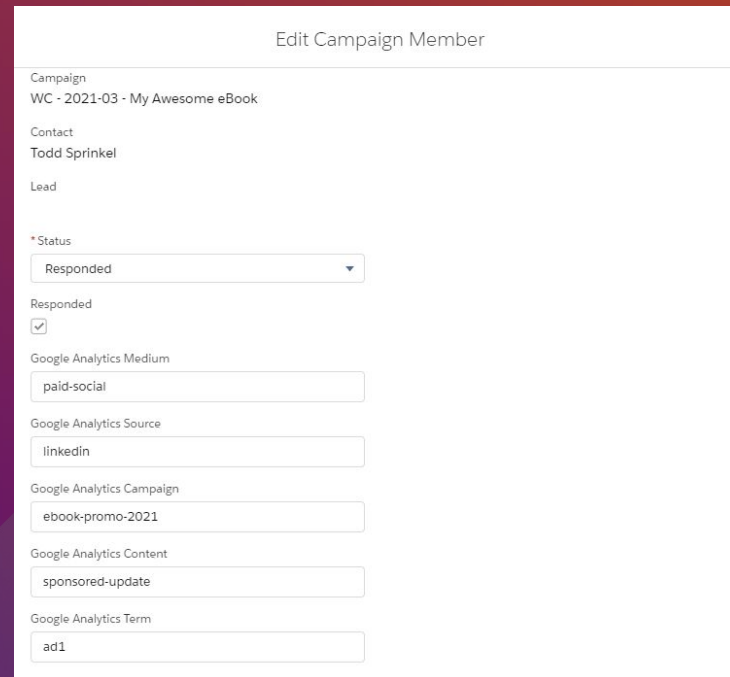
Channel  
Paid Social

Content Type  
eBook

Source  
LinkedIn

Active  
☒

## Option 2



**Edit Campaign Member**

Campaign  
WC - 2021-03 - My Awesome eBook

Contact  
Todd Sprinkel

Lead

\* Status  
Responded

Responded  
☒

Google Analytics Medium  
paid-social

Google Analytics Source  
linkedin

Google Analytics Campaign  
ebook-promo-2021

Google Analytics Content  
sponsored-update

Google Analytics Term  
ad1

# Salesforce Classic Merging in Lightning

- Merging Records in Lightning is dependent upon duplicate rules and the Potential Duplicates Related List
- You can force the "Classic Merge" using a custom button on Accounts and Contacts and Leads
- `/merge/accmergewizard.jsp?retURL=/001`
- `/merge/conmergewizard.jsp?id={!Account.Id}&retURL={!Account.Id}`
- `/lead/leadmergewizard.jsp?retURL=/00Q&id={!Lead.Id}`
- [ForcePanda](#)

Lead Merge Experiment 1 - Search for Duplicates

Search Convert Lead Cancel

Name  Search Convert Lead Cancel

Last Name

Company

Email ☒ testmerge@example.com

Email Domain ☐ example.com

Phone

Search Convert Lead Cancel

**Matching Leads**

| Name                                        | Title | Company    | Phone | Mobile | Email                 | Lead Status          | Owner Alias |
|---------------------------------------------|-------|------------|-------|--------|-----------------------|----------------------|-------------|
| <input type="checkbox"/> Merge Experiment 1 |       | Test Merge |       |        | testmerge@example.com | Open - Not Contacted | ISet        |
| <input type="checkbox"/> Merge Experiment 2 |       | Test Merge |       |        | testmerge@example.com | Open - Not Contacted | ISet        |

Other Matching Records

**Matching Contacts**

Merge Experiment 1

| Title      | Company    | Phone (2) | Email                 |
|------------|------------|-----------|-----------------------|
| Test Merge | Test Merge |           | testmerge@example.com |

Open - Not Contacted Working - Contacted Closed - Not Converted Converted Mark Status as Complete

Activity Details Chatter

Lead Owner Todd Sprinkel

Name

Company

Matched Account

Title

Lead Source

Phone

Mobile

Fax

Email

Website

Region

**Related**

We found 1 potential duplicate of this Lead. View Duplicates

Funnel History (0)

Campaign History (0)

## Custom Metadata Types, Custom Labels, etc.

- Custom Labels - Avoid hardcoding IDs and translations
- Custom Metadata Types - Scalable configuration for complex data types
  - Whitelists
  - Configuration Data (e.g. Work Day Start Time)
  - Mappings
- CMTD - kind of like custom objects, but can be deployed as metadata and don't count against your data storage or governor limits
- Reference in automation or code without needing to change the code when values change

# Salesforce Power of One

- Custom Formula Field on main objects - Return 1
- Useful for getting unique counts/using unique counts in formulas
- Partially addressed by "Show Unique Count"

Report: Campaigns with Influenced Opportunities  
**New Report**

|               |                          |                         |
|---------------|--------------------------|-------------------------|
| Total Records | Total Opportunity Amount | Total Opportunity Count |
| 4             | \$110,000.00             | 2                       |

| <input type="checkbox"/> Campaign Name ↑                                     | <input type="checkbox"/> Responded  | <input type="checkbox"/> Opportunity Name | <input type="checkbox"/> Opportunity Amount | <input type="checkbox"/> Stage | <input type="checkbox"/> Oppt Close Date | <input type="checkbox"/> Account Name | <input type="checkbox"/> Opportunity Count |
|------------------------------------------------------------------------------|-------------------------------------|-------------------------------------------|---------------------------------------------|--------------------------------|------------------------------------------|---------------------------------------|--------------------------------------------|
| <input type="checkbox"/> WC - 2021-03 - My Awesome eBook - PS - LinkedIn (4) | <input checked="" type="checkbox"/> | Test Opportunity A                        | \$100,000.00                                | Prospecting                    | 9/30/2023                                | MT Mockup                             | 1                                          |
|                                                                              | <input checked="" type="checkbox"/> | Test Opportunity B                        | \$10,000.00                                 | Prospecting                    | 9/30/2023                                | MT Mockup                             | 1                                          |
|                                                                              | <input type="checkbox"/>            | Test Opportunity A                        | \$100,000.00                                | Prospecting                    | 9/30/2023                                | MT Mockup                             | 1                                          |
|                                                                              | <input type="checkbox"/>            | Test Opportunity B                        | \$10,000.00                                 | Prospecting                    | 9/30/2023                                | MT Mockup                             | 1                                          |
| Subtotal                                                                     |                                     |                                           | \$110,000.00                                |                                |                                          |                                       | 2                                          |
| Total (4)                                                                    |                                     |                                           | \$110,000.00                                |                                |                                          |                                       | 2                                          |

Salesforce

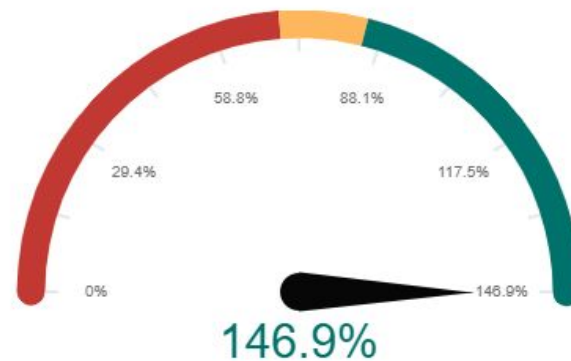
## Difference in Business Hours Formula

```
ROUND( 8 * (
  ( 5 * FLOOR( ( date/time_1 - DATETIMEVALUE( "1900-01-08 16:00:00" ) ) / 7) +
    MIN(5,
      FLOOR(MOD( date/time_1 - DATETIMEVALUE( "1900-01-08 16:00:00" ), 7)/1) +
      MIN( 1, 24 / 8 * ( MOD( date/time_1 - DATETIMEVALUE( "1900-01-08 16:00:00" ),
1 ) ) )
    )
  )
-
  ( 5 * FLOOR( ( date/time_2 - DATETIMEVALUE( "1900-01-08 16:00:00" ) ) / 7) +
    MIN( 5,
      FLOOR(MOD( date/time_2 - DATETIMEVALUE( "1900-01-08 16:00:00" ), 7)/1) +
      MIN( 1, 24 / 8 * ( MOD( date/time_2 - DATETIMEVALUE( "1900-01-08 16:00:00" ),
1 ) ) )
    )
  )
),
0 )
```

## Salesforce Run Rate Formula

- $\frac{\text{YourActualValue}}{(\text{Target} * ((\text{TODAY}() - \text{StartDate}) / \text{LengthOfPeriod}))}$
- $\frac{\text{AMOUNT:SUM}}{(1000000 * ((\text{TODAY}() - \text{DATE}(2025,10,1)) / (\text{DATE}(2025,12,31) - \text{DATE}(2025,10,1))))}$
- You can also make the % of way through the time period more generic as well

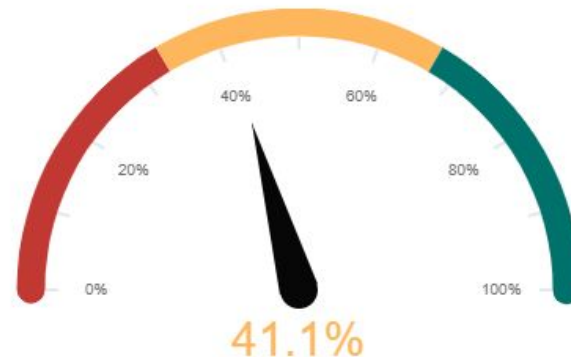
Pipeline Run Rate



[View Report \(Pipeline Run Rate\)](#)

As of May 8, 2024, 11:41 AM

Percentage of Way Through Quarter



[View Report \(Percentage of Way Through Quarter\)](#)

As of May 8, 2024, 11:41 AM



# Salesforce

## Get All Fields from an Object

- How to get all the fields on an object:
- Run this in Dev Console:

- Download the log, copy the JSON from the `USER_DEBUG` line, paste [here](#) and download the CSV.

[illegible]

# Salesforce Trailhead/Developer Edition



**Build enterprise-quality apps fast  
to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework



## **Sign up for your Developer Edition (Legacy)**

A Salesforce Platform environment for free.

Complete the form to get access to the Developer Edition (Legacy).

First Name\*

Last Name\*

Email\*

Role\*



Company\*

Country/Region\*



# How to Get FREE Help from Experts

# How to Get FREE Help from Experts

1

Meet people where they are

---

Join Slack communities, product communities, user groups, etc.

# How to Get FREE Help from Experts

1

Meet people where they are

---

Join Slack communities, product communities, user groups, etc.

2

Post publicly

---

Ask your question in public. Feel free to @ anyone specific, but don't DM me unless it's specifically about my work. Give others a chance to help.

# How to Get FREE Help from Experts

1

Meet people where they are

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Join Slack communities, product communities, user groups, etc.

2

Post publicly

---

Ask your question in public. Feel free to @ anyone specific, but don't DM me unless it's specifically about my work. Give others a chance to help.

3

Have a reasonable, specific question (No Hello)

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Provide details of your ask upfront—don't wait for someone to bite before providing details like expectations, steps to reproduce and any error messages. If you can, provide links, screenshots, etc.



# How to Get FREE Help from Experts

4

Demonstrate that you've already tried

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Use Google, reference documentation/forums related to what you're trying to do. Put in the effort before asking for help.

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5

Value their time

Say thank you. Offer to pay for their time if beyond a quick question.

# How to Get FREE Help from Experts

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Value their time

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Say thank you. Offer to pay for their time if beyond a quick question.

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6

Pay it forward

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Network religiously. Help others where you can. I am much more likely to want to help you if I see you giving back to the community.



Meet people  
where they are

Post publicly

Have a  
reasonable,  
specific  
question  
(No Hello)

Show  
you've  
already  
tried

Value  
their  
time

Pay it  
forward



**Thank you**