Partner Revision Guide

Marketing Cloud Email Specialist Certification Exam

How to Use This Revision Guide

This guide walks you through the subjects that will be tested in the Marketing Cloud Email Specialist exam and suggests key points to revise. Additional documentation links are also provided. This guide is intended to focus your knowledge and prepare you for the exam after you have completed the training in the Partner Product training learning path.

Each section covers a tested section outlined in the official Marketing Cloud Email Specialist certification Study Guide.

Subjects Tested

Subject Area	Objectives
Email Marketing Best Practices	Identify the elements that make an email message effective or ineffective. Describe global legal compliance guidelines. Identify ways to improve deliverability. Explain acquisition methods to allow potential subscribers to opt-in. Identify best practices for interacting with potential and active subscribers.
Email Message Design	Describe email design best practices. Explain how to create an email using Responsive Design in the email application. Explain A/B testing best practices to test different email elements to drive results. Describe the available tools to prepare and send an email. Explain how approvals work in the Email application.
Content Creation and Delivery	Explain various ways to customize email messages. Given a scenario, identify the optimal ways to customize an email message. Describe the available tools to construct email messages. Explain the differences between Simple Send, Guided Send, and User-Initiated Send Definition. Given a scenario, identify the appropriate send method. Describe various send capabilities in the Email application. Describe how Send Classifications, Delivery Profiles, and Sender Profiles are used.

Marketing Automation	Given a scenario, explain which automation tool to use. Describe the capabilities of Automation Studio.
Subscriber and Data Management	Compare and contrast Lists and Data Extensions and describe when to use them. Describe profile attributes, including Preview Profile Center. Given a scenario, describe the relationship between Subscriber Key, Primary Key, Send Relationship, and All Subscribers. Given a scenario, describe the ramifications of various settings when creating a Data Extension. Describe what happens when one unsubscribes from Lists vs. Data Extensions. Explain how unsubscribe works in each Marketing Cloud Edition. Describe the differences between a global unsubscribe and a master unsubscribe. Identify the ways to import, including Import Wizard, API, and Import Activity. Given a scenario, explain the optimal way to import data using the user interface vs. using the API. Given a scenario, explain when to use tools to segment data. Describe how to refresh segments manually vs. using automation. Describe how to use behavioral data to segment data. Explain how data relationships work and their use cases. Explain sharing data across business units.
Tracking and Reporting	Explain email analytics terminology. Analyze individual email performance. Given a scenario, describe the reporting functionality and capabilities
External Email Integrations	Identify where to find information or help on APIs and Marketing Cloud Connect.

Email Marketing Best Practices

This section of the exam covers five objectives:

- *Identify the elements that make an email message effective*
- *Describe global legal compliance guidelines*
- *Identify ways to improve deliverability*
- *Explain acquisition methods to allow potential subscribers to opt in*
- *Identify best practices for interacting with potential and active subscribers*

Best practices for making email messages effective

- Get permission!
- Keep the subject line short and sweet (under 50 characters).
- Use A/B testing (to determine how subscribers react to different emails).
- Show your style!
- Make sure communications are relevant. Make emails more relevant using personalization and dynamic content.
- Ensure calls to action are direct and action focused. Avoid “click here” or “download here” messages.
- Optimizing for mobile is very important.

CAN-SPAM requirements

The CAN-SPAM (Controlling the Assault on Non-Solicited Pornography and Marketing) Act requires that commercial emails and social content must adhere to the following:

- You must accurately identify the sender in the header info.
- You must use a subject line that accurately represents the content of the email.
- You must identify the message as an advertisement, unless you have express opt-in (consent) from the subscriber.
- You must include your physical mailing address in the email.
- You must provide a mechanism to opt out of communications. You cannot require the receiver to log in or visit more than one page to unsubscribe.
- You must honor opt out requests promptly (within 10 days). Your unsubscribe mechanism must be operational for at least 30 days after sending the email.

Improving deliverability

- Ensure all subscribers have opted in (given permission) to receive communications from you.
- Deal with bounce rates more than 20%.
- Ensure that your subscribers recognize your email is from you by adding the name of your organization to the subject line.
- Provide a recognizable **From** Name and Address.
- Add a message informing the recipient of how they subscribed to the email at the top.
- Purge old or inactive addresses regularly.

- Manage frequency and content – make sure you are communicating in an expected frequency.
- Authenticate your email to avoid the bulk folder.

Acquisition methods

- Website signup (this is the most popular acquisition method) – you can use single or double opt-in (where an email confirmation is the second step)
- Facebook
- Mobile opt-in
- Stores
- Customer service and inbound sales calls
- Sales associate requesting email during checkout
- Emailed receipt or online ticket purchase
- Registration for loyalty programs or providing incentives to sign up
- Location based campaigns

Best practices for interacting with potential and active subscribers

- Never force people to subscribe. Keep opt-in forms short and make email signup forms or links prominent.
- Avoid overly rich signup incentives - keep them moderate and always deliver incentives to the email address provided.
- When onboarding, use a signup confirmation page as a “pre-welcome message” to engage your subscribers.
- When someone subscribes, send a welcome email **immediately** to avoid SPAM complaints.
- Send a series of welcome messages, and set expectations as to the number of emails customers will receive from you.
- Treat new subscriptions as conditional on the subscriber engaging with your emails.
- Ensure that the email content will accurately convey messages when images are blocked. Design with a clear and content hierarchy and make sure that content above the fold is well branded.
- Use personalization and dynamic content. Use good default content.
- Make the value proposition simple and clear.
- Make it easy to unsubscribe. It should never take more than two clicks to unsubscribe.
- Never share email addresses with other brands within your company,
- Don`t buy email lists.

Check Out These Resources!

https://www.marketingcloud.com/blog/3-reasons-to-make-personalization-a-priority/
http://blog.hubspot.com/marketing/great-call-to-action-examples#sm.0000k31tf6tepf88107deaq2s5ni9
https://help.marketingcloud.com/en/documentation/exacttarget/resources/system_guides/can_spam_compliance/
https://www.marketingcloud.com/products/email-marketing/email-marketing-best-practices/
http://www.marketingcloud.com/products/email-marketing/email-marketing-best-practices/grow-email-subscribers
http://help.marketingcloud.com/en/documentation/exacttarget/resources/email_deliverability/deliverability_best_practices/

Email Message Design

This section of the exam covers five objectives:

- *Describe email design best practices.*
- *Explain how to create an email using Responsive Design in the email application.*
- *Explain A/B testing best practices to test different email elements to drive results.*
- *Describe the available tools to prepare and send an email.*
- *Explain how approvals work in the Email application.*

Email design best practices

- Design for the top 600 pixels by three inches.
- Make links look like links, so it is clear that they should be clicked on.
- Minimize the use of images and minimize text. Few emails are read – people scan, so keep the email brief.
- Make it easy for the reader to unsubscribe.
- Personalize subject lines and email content. Use an optimized subject line. This is the biggest influence on open rates. Keep impactful words within the first 35 characters.
- Avoid using CSS.
- Minimize the use of spam words.
- Always test!
- Take advantage of the pre-header space. Use at least 85 characters for your pre-header and work with and expand on your subject line, not repeat it.
- Use a trustworthy and recognizable **From** name. Keep it under 25 characters.
- Make sure content is relevant and use content hierarchy.
- Optimize for images-off viewing.
- Make email actionable in any environment.
- Provide a clear call to action.

How to create an email using Responsive Design

It's important to understand the differences between Mobile Aware and Responsive Design.

Mobile Aware uses design-only tactics; making simple improvements to enhance both the desktop and mobile experience. The goal is to create a single, mobile-friendly layout that works in all viewing environments.
A Mobile Aware email has three key elements:

1. It has a single column layout (mobile optimized templates)
2. It contains large text, images, and buttons
3. Links and buttons are spaced out so they can be accurately tapped.

Responsive design is a technique design to create different versions of an email so it will show optimally on different devices. This involves extra email design and coding and often the creation of two or more versions of an email.

A/B Testing Best Practices

A/B testing is used to market test two versions of an email. It automatically splits the audience, calculates the winner, and can send winner to remainder.
The winner is based on the highest unique opens or highest click-through rate.
A/B testing can be used to test:

- Subject lines
- Emails
- Content areas
- From names
- Send date and time
- Preheaders

The percentage of subscribers to send the A/B test to depends on the number of subscribers in the list(s). For more than 50,000 subscribers, we recommend sending to 5% per condition. For fewer than 50,000 subscribers, we recommend using 10%.
Wait 24 hours to declare a winner.

Tools to prepare and send an email

There are a variety of tools you can use for different purposes.

- **Portfolio**: Manage images, documents, media files. Maximum image size is 200KB. Other file types have max size of 1MB.
- **Assets**: Images (.jpg, .tiff, .gif, .bmp), documents used as attachments (Word, Excel, PPT, text, pdf, flash, QuickTime), and HTML, CSS, or JavaScript files.
- **Content Detective**: This is spam-filtering software that identifies words, phrases and patterns that are likely to trigger filters. It finds potential problems and suggests solutions. However, it does **not** scan HTML code to make sure it is written correctly.
- **Validate**: This tool confirms correct field syntax, confirms that content and data being used for Dynamic Content rules are built correctly, confirms Guide Template Language and AMPscript is written properly, and validates for required elements (unsubscribe link and physical mailing address).
- **Send Preview**: This is a tool that enables you to see how your email will render with Personalization Strings populated, Dynamic Content displaying content based on subscriber data, and data displayed/content rendered from Guide Template Language and AMPscript.
- **Test Send**: This provides a simple way to send a test email to yourself and others. It enables you to see how content will render. You can send a test email to up to 5 email addresses at once. Note that personalization does not populate and Dynamic Content displays default content. Guide Template Language and AMPscript code is displayed, but not all links are active.

How approvals work in the Email application

This Email Approval Process is a feature in the Email application where the end user is able to submit a created email for approval before sending. This feature needs to be enabled by an administrator.
An email will show as having a **draft** status until it is sent for approval. It can have different states during the email approval process:

- Pending: When the email is sent for approval, it will show as having a Pending status. To approve the email, the approver can navigate to the email in the Email app or access the **Approvals** dashboard.
- Approved: The email is approved.
- Declined: The email is declined.

When an email is in Draft, Pending, or Declined status, it cannot be sent. However, you can make a Test Send.
The approval trail can be seen by clicking **View Audit Trail**.

Check Out These Resources!

https://www.exacttarget.com/products/email-marketing/email-design-toolkit
http://www.exacttarget.com/blog/learn-to-design-responsive-emails-like-a-pro/
http://www.exacttarget.com/blog/7-responsive-email-design-faqs/
https://help.exacttarget.com/en/documentation/exacttarget/ab_testing/
https://help.salesforce.com/HTLaunchCourse?courseid=a1P300000012sT2EAI&trainingpathid=a1S30000000iIVDEA2
http://help.exacttarget.com/en/documentation/exacttarget/content/portfolio/
https://help.exacttarget.com/en/documentation/exacttarget/admin/approvals/

Email: Preparing for your Email (Online course: 4 minutes)
Email: Testing your Email (Online course: 6 minutes)
Email: Approvals (Online course: 15 minutes)

Content Creation and Delivery

This section of the exam has the following objectives:

- *Explain various ways to customize email messages*
- *Given a scenario, identify the optimal ways to customize an email message*
- *Describe the available tools to construct email messages*
- *Explain the differences between Simple Send, Guided Send, and User-Initiated Send Definition*
- *Given a scenario, identify the appropriate send method*
- *Describe various send capabilities in the Email application*
- *Describe how Send Classifications, Delivery Profiles, and Sender Profiles are used*

Creating and Customizing Email messages

When creating an email, the first thing you will need to do is upload **assets**.
Assets are anything you are going to include in your email, such as images or documents. (You should make any required edits to images before uploading them.) Assets are uploaded into **Content>Portfolio** and can be imported as a single upload or a batch upload using a .zip file.

If you want to see the source URL for an asset you have added, highlight the asset and click **Properties**. You will need this URL when you are using HTML.

When you've uploaded your assets, you can complete the content.

Content blocks are used to create the email content. They are simply pieces of content used to populate emails.

You have two options when creating content blocks:

1. Create in **My Contents** area and then place in the email. You can then reuse across all digital channels.
2. Create in an email as you create it.

Types of Content Blocks:

- Text only
- Image only
- Text and image
- Freeform (can use tables)
- HTML/Guide Template Language – AMPscript too
- Dynamic Content
- A/B Testing Content
- Predictive Intelligence Content

When adding content to content blocks, you can select from Content, Dynamic Content or A/B Test Content:

- Static content is standard, unchanging content
- Dynamic content allows you to decide which attributes or fields you would like to customize your content to and establish rules. You can use dynamic content in any type of email **except** text-based. Dynamic content requires content boxes. Use dynamic content when you want to deliver a targeted message to a specific audience.
- A/B testing can be used to test two different content areas to see which one performs better.

Templates (Content>Templates) determine the layout and structure of an email (banner, background colors, border, and layout). You can build a template using the Template Editor or Paste HTML.
The Template Editor provides seven different templates, each containing a header and content blocks. Templates are stored in a folder called a Template Library.

Only HTML code between the body tag (not including the body tag) should be pasted into HTML paste templates. The system adds the header and body tags to paste HTML landing page templates. You can use this method to track email opens.

Populate the banner with a header image, and think about layout. Choose a mobile optimized layout.

When you create an email, you can choose to:

- Build from a template
- Paste HTML (Usually, HTML is created in an outside editor and pasted into the email application. This option does not use a template.)
- Text only (Use this option to create a text-only email. No HTML will be created or sent, regardless of the subscriber's preference.)
- Revise an existing email

Add your content blocks and customize to your goals.
Click arrows expose content boxes that can be drag and dropped.

You can add personalization to your emails in three different ways:

- Personalization strings – easier to use than dynamic content or AMPscript, and you can obtain tracking information.
- Dynamic content
- AMPscript or Guide Template Language – can interact with data extensions

When you are ready to send your email, you can choose to send from the following three ways:

- **Guided Send** – this is a multi-screen wizard that takes you through the steps needed to send an email. You can use a Guided Send to send to data extensions and data filters. You can exclude recipients by list, group, or data extension. You can send test emails to one email address when your email contains AMPscript or dynamic content. You can also suppress tracking from reports and refresh a group before sending. Guided Send supports Send Classifications.

- **Simple Send** – this is a basic one-page send screen that allows you to easily send to a group or list. You can use Simple Send to send to a group or a list. The default send time is immediately, but you can schedule for a future date and time.
- **User-Initiated email** – a one-page send screen that allows you to easily and quickly set the parameters to send an email. The User-Initiated Email can be automated.

Only Guided Send and User-Initiated Emails allow you to send to a data extension. All three methods allow you to set up **Send Classifications**.

A Send Classification allows you to set parameters for a send job and store them for future use. The Marketing Cloud Administrator will create Send Classifications.
Specify:

- Sender Profile (From Name and From Address)
- CAN-SPAM classification
- Delivery Profile – IP Address, header, footer
- Priority

Check Out These Resources!

https://litmus.com/blog/email-marketing-best-practices-in-action-with-lots-of-examples
https://help.exacttarget.com/en/documentation/exacttarget/content/personalization_strings/
Email: Dynamic Content (Online course: 6 minutes)
Email: Paste Plain Text and HTML into Content Area Boxes (Online course: 8 minutes)
Email: Send Classifications (Online course: 18 minutes)
https://help.exacttarget.com/en/documentation/exacttarget/content/ampscript/
https://help.exacttarget.com/en/documentation/exacttarget/admin/send_classifications/
https://help.salesforce.com/htconsumerdirector?action=LaunchContent&tuId=a1T30000002dqFCEAY
http://help.exacttarget.com/en/documentation/exacttarget/content/guided_send/

Marketing Automation

This section of the exam has two objectives:

- *Given a scenario, explain which automation tool to use*
- *Describe the capabilities of Automation Studio*

Automation Tools

- **Playbooks**: These are step-by-step guides for executing digital marketing campaigns throughout the customer lifecycle. Three playbooks are available: **Welcome** series, **birthday** email and **customer anniversary**.
- **Triggered emails**: These are sent based on an event that occurs outside the Marketing Cloud.
- **Journey Builder**: This is an intuitive 1:1 marketing engine that allows you to build real-time messages across online and offline channels based on actual customer behavior. Journey Builder can be used to play, personalize, and optimize any customer lifecycle program.
- **API**: Application Program Interface. It is source code based specifications in order to allow one computer application to speak to another.
- **Automation Studio**: This is an easy-to-use drag and drop tool that allows you to define a workflow and establish the schedule for the automation of various details including the importing of data, the sending of email, and the exporting of data.

Automation Studio

Automation Studio provides two types of automation: **scheduled** and **triggered**. You will select the type of automation on the **Summary** tab.

- Use scheduled automation when you want your automation to start based on a schedule you define, or when you want to run an automation once.
- Use a triggered automation when you want your automation to start based on the event of a file being dropped into your designated Enhanced FTP folder.

When you have selected the automation, define the workflow – these are activities associated with the email application and can be selected from a menu on the left hand side of the **Workflow** tab:

- **Data extract** – gives you the ability to export tracking information or data from a data extension. This activity also allows you to transform an XML file into a comma delimited or pipe delimited file for you to import into the Email application.
- **Import file** - will import a file from an FTP site to a list or data extension
- **Transfer file** – will decrypt or unzip a file or take a file that has been extracted and place it on the FTP location. Used in conjunction with data extract activity to place the file on the FTP, or in conjunction with Import File activity to import data.
- **Filter activity** – applies a data filter to a list or data extension and places the results in a filtered list or a filtered data extension. You will need to create the data filter before creating the filter activity. You will also need to select the source list and specify the results group name and folder.

- **Refresh group activity** – applies criteria to a list to create a subset of subscribers. The subset is called a Group. Used with lists only.
- **SQL Query activity** – takes the SQP statement and applies it to the specified data extension. The records meeting the criteria are placed in a results data extension.
- **Send email activity** – choose a User Initiated Email definition to execute or define the parameters for the send using the Send Activity.
- **Wait activity** – allows you to pause/wait for a specific duration or until a specific time before performing the next step.

Steps are the order in which activities will be carried out. Steps can have multiple activities. When refreshing filtered data extensions and filtered lists from a single source, do not put more than two activities in a single step.

For scheduled automations, a schedule will need to be defined on the **Schedule** tab.
Automations can repeat hourly, daily, weekdays, weekly, monthly, or yearly.
You can specify that a scheduled automation will end:

- Never
- After
- On Date

The **Activity** tab shows the health of the automation as well as when the automation will run.
It is on the Activity tab that notification email addresses are entered.

Check Out These Resources!

http://help.marketingcloud.com/en/documentation/automation_studio/

Subscribers and Data Management

This section of the exam has the following objectives:

- *Compare and contrast Lists and Data Extensions and describe when to use them.*
- *Describe profile attributes, including Preview Profile Center.*
- *Given a scenario, describe the relationship between Subscriber Key, Primary Key, Send Relationship, and All Subscribers.*
- *Given a scenario, describe the ramifications of various settings when creating a Data Extension.*
- *Describe what happens when one unsubscribes from Lists vs. Data Extensions.*
- *Explain how unsubscribe works in each Marketing Cloud Edition.*
- *Describe the differences between a global unsubscribe and a master unsubscribe.*
- *Identify the ways to import, including Import Wizard, API, and Import Activity.*
- *Given a scenario, explain the optimal way to import data using the user interface vs. using the API.*
- *Given a scenario, explain when to use tools to segment data.*
- *Describe how to refresh segments manually vs. using automation.*
- *Describe how to use behavioral data to segment data.*
- *Explain how data relationships work and their use cases.*
- *Explain sharing data across business units.*

List Model and Data Extension Model

A list is a collection of subscribers stored in the email application. There are four types of list:

- Weekly Promotions List
- Product Alerts List
- Monthly Newsletter List
- All Subscribers List – this is your master list. Subscribers can only appear once on the All Subscriber list. There will be a record for each subscriber.

When a subscriber is added to a list, they are by default added to the *All Subscribers list.*
Individual lists are subsets of subscribers and subscribers can be members of more than one individual list.
You create a new list under **Subscribers** dropdown

Some of the limitations to be aware of with the list model:

- You can only store data about your subscribers in the list model.
- In the list model, subscriber data is held in a **profile attribute**
- From a scalability perspective, if you are dealing with more than 500,000 subscribers, the list model is not recommended.

Data extensions give you more flexibility. Data extensions are customer-defined tables. They can hold just about any type of data and are scalable. You can store information about subscribers and send to that data extension. You might also store data about your products or your brick and mortar locations and use relational database logic for data segmentation and population of dynamic content.

The learning curve for data extensions on the client side is relatively steep. It requires an understanding of relational databases, an understanding of SQL as a way to segment that data, and then possibly, an understanding of scripting languages to use that data in a proprietary scripting language for dynamic content creation.
Data extensions do require a bit more of a technical approach.

There are two different types of data extension:
Sendable data extension: this would be an example of a data extension that has subscriber data in it, specifically email address and subscriber key so you can actually send.
Nonsendable data extension: this could be a product list or a list of your locations, or basically any data you want to store.

There are a number of different fields available:

- Boolean field
- email address
- phone number
- locale
- decimal

Use the data extension model when:

- Lists are going to be greater than 500,000 subscribers
- You support multiple subscriber data sets (with separate definitions)
- You send global messages
- You require fast import speeds
- You implement triggered sends

Use the list model when:

- Lists will contain 500,000 subscribers or less long-term
- You prefer simplicity over performance
- You do not require fast import speed
- You plan to use a limited number of subscriber attributes
- You use the XML API
- You use the SOAP or REST APIs
- You prefer a flexible subscription model

Check Out These Resources!

http://help.exacttarget.com/en/documentation/exacttarget/solution_guides/using_a_list_versus_a_data_extension/

Profile Attributes

Profile Attributes are placeholders that store information about your subscribers such as first name, last name, gender etc. Attributes hold individual values (can only have one value). They are limited to the following data types:

- Text – alpha numeric
- Numeric – will only accept a number. Dollar signs, decimals etc. will not fit.
- Date – any standard date configuration

When you have saved an attribute, the data type cannot be changed.

A **preference attribute** characterizes how a subscriber prefers to receive email. These are specified as "yes or no" choices to a declarative statement. For example: "The subscriber prefers to receive email as HTML." You can build lists and groups based on these preferences.

The **Profile Center** is a webpage where subscribers can go to change their contact information. When an attribute is created, it is listed in the profile center unless it has been hidden.
To preview the Profile Center to see what it looks like to a subscriber:

1. Click the **Subscribers** tab.
2. Click **Profile Management** or **Preference Management**.
3. In the profile/preference management toolbar, click **Preview Profile Center**, which opens the web page that subscribers see.

Check Out These Resources!

http://help.exacttarget.com/en/documentation/exacttarget/subscribers/profile_and_preference_attributes/
http://help.exacttarget.com/en/documentation/exacttarget/subscribers/profile_center/

Subscriber Keys and Primary Keys

A **Subscriber Key** is a text field that contains a value that uniquely identifies a subscriber in your system. Subscriber key is the primary key in the Marketing Cloud. The Marketing Cloud requires you to provide an email address for each subscriber. Using a subscriber key enables you to identify a subscriber with a value other than the email address – this means you can maintain multiple sets of attributes for a single email address (for example, if a couple share the same email address, you can identify each individual by their subscriber key).

Primary key – determines whether the system considers this key to be the primary key of this table. The system requires that the value in this field be unique so it can use this field to uniquely identify a row. It speaks to the data schema for a particular table/data extension. **Is only used for data extensions and is required when adding/updating fields.**

Subscriber keys are used for both lists and data extensions and should be enabled before any data is brought into the Marketing Cloud. In the Marketing Cloud, the Subscriber Key would be considered the Primary key – the unique source of truth.

Check Out This Resource!

http://help.exacttarget.com/en/documentation/exacttarget/subscribers/subscriber_key/

Data Imports

Three ways that data can be imported into the Marketing Cloud:

- Import Wizard
- Import Activity
- API

Importing with Lists

When the Subscriber key is not enabled, on the back end of the Marketing Cloud, the Email Address will be assigned as the Subscriber Key. When bringing data in, the only data required is Email address and any other required attribute on the account.

When the Subscriber key is enabled, the required information for importing a list is Email address, any other required attribute on the account, and subscriber key.

Import options for the List model:

Add, Update, Add and Update

When you are importing into a list, email address field is validated at the time of import by a tool called List Detective.

Importing with Data Extensions

Each data extension can be its own data schema.

- Sendable data extensions: Must contain an email address type data field, must identify field that relates to a subscriber key, non-nullable fields must have a value.
- Non-sendable data extensions: Must have a primary key and non-nullable fields must have a value.

If you do not have an email address in a sendable data extension, system will not recognize as a subscriber.

Import options are Add, Update, Add and Update, and Overwrite.

Validation of email address is at time of send.

Check Out These Resources!

https://help.exacttarget.com/en/documentation/exacttarget/subscribers/data_extensions_and_data_relationships/data_extension_import_wizard/

http://help.exacttarget.com/en/documentation/exacttarget/interactions/activities/import_activity/

Segmenting data (Groups, data filters, and query activities)

Tools for segmenting lists are **groups**. For data extensions – SQL queries/**query activities**
Data filters can be used with list or data extension model. Similar to groups. A data filter can look at a list or a data extension.

Group: Subset of subscribers from a list. Group from All Subscribers list or Individual list. Can create random group. Rule-based group – take values and create rules to segment those. Examples: region and join date. Can refresh rule-based groups – snapshot in time. As data comes in, will need to pick up new subscribers. Group Refresh can be performed automatically or manually. Random groups cannot be refreshed.

Query activity: An activity that can be used as part of an automation or run independently. Allows clients to write SQL against both their own data and system data. Results in a Data Extension with all rows that match criteria. Example: Select * from [Data Extension] where Region = West and Join_Date > [today minus 7 days]

The results of a query are another Data Extension.

https://help.exacttarget.com/en/documentation/exacttarget/subscribers/data_filters/
https://help.exacttarget.com/en/documentation/exacttarget/subscribers/groups/

- **Smart Capture –** tool to create lead capture forms to include in your landing pages. When a lead completes the form on the landing page and clicks the Submit button, *the Smart Capture form automatically adds the information to the subscriber list, data extension*, or outside data source such as an integrated CRM system. With a Salesforce account, you can use an import activity to create and populate a data extension with the data from a Salesforce object or report. If you import to a list using the import activity, the system uses the List Detective tool to prevent bad email addresses from being imported.
- **Suppression list** - list of subscribers that you don't want to receive your communications (a "do not contact" list). Usually addresses with a history of spam complaints, unsubscribe lists from previous email delivery providers or advertisers, addresses of your competitors, and canceled customers. *Subscriber records on a suppression list do **not** have a subscriber status* and are not counted in the All Subscriber count. Suppression lists are available if you use sendable data extensions. Used with guided sends, user-initiated, and triggered emails.
- **Exclusion list -** current subscribers who you choose to exclude from specific messages. Set up exclusion lists at the time of send.
- **Publication list -** helps you manage how subscribers receive several different categories of emails or SMS messages. Having a separate publication list for each communication type enables you to honor an opt-out request from one publication type without unsubscribing that person from all previously subscribed-to publications.
- Send logging - create *a data extension* that uses the send logging template. Each account receives one send logging template and data extension. Only user-initiated send, triggered send and A/B Tests sends are logged in the send log.

- **Web Collect -** sign up form functionality that allows your subscribers to subscribe, provide attribute information, or unsubscribe from your communications on your website.

Check Out These Resources!

https://help.exacttarget.com/en/documentation/exacttarget/subscribers/smart_capture/
https://help.exacttarget.com/en/documentation/exacttarget/subscribers/suppression_lists/
https://help.exacttarget.com/en/documentation/exacttarget/subscribers/publication_lists/
https://help.exacttarget.com/en/documentation/exacttarget/subscribers/send_logging/
http://help.exacttarget.com/en/documentation/exacttarget/subscribers/web_collect/
https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000iIgVEAU
http://help.exacttarget.com/en/documentation/exacttarget/subscribers/measures/

Measures

A **measure** is a unit of subscriber behavior that you define. Categories:

- Bounce: bounce data for emails sent from your account.
- Click: link clicks for emails from your account.
- FTAF: email messages from your account being forwarded to a friend.
- Not Clicked: email messages from your account that were not clicked.
- Not Opened: email messages from your account that were not opened.
- Open: email opens for your account.
- Sent: jobs sent from your account.
- Survey Response: subscriber survey responses.
- Unique Click: unique link clicks for emails from your account.
- Unique Open: unique opens for emails from your account.
- Unsubscribe: unsubscribes from email lists in your account.

If the value is zero (no statistics), the value is not calculated for a subscriber. If a subscriber does not open any emails, they cannot be counted.
To segment on subscribers who are not engaged, use the Not Opened (or Not Clicked) event.
Use measures to define your own tracking statistics. Some examples of measures that you might create include:

- Total opens in last 30 days
- Total click-throughs in last 30 days
- Hard bounces in the last month
- Unique unsubscribes in the last 30 days.

Data sharing across business units

In Enterprise 2.0, sharing is an action taken by the owner of an item to allow others to access an item.

A shared item is an email, template, portfolio, data extension, or content area with specified permissions. Shared content can be used as dynamic content. Can share dynamic content from a shared items folder.

Users outside the business unit can access the shared item if they have particular role and permission settings.
Shared items are located in a shared items folder. You can share folders across several different business units within the same Enterprise 2.0 account. You can set permissions on the shared items folder.
Users working within business units inside an Enterprise 2.0 account can also created shared items folders and set permissions on them.

Check Out These Resources!

http://help.exacttarget.com/en/documentation/exacttarget/enterprise/shared_items/

Unsubscribes

List:

- List level unsubscribe – one click unsubscribe from that particular list.
- Master unsubscribe – All Subscribers level.

Data Extension:

- List level unsubscribes come in on a Publication List. Still have Master Unsubscribe.
- Special type of list – choose when sending to sendable data extension. If you do not choose a Publication list at the time of send, defaults to All Subscribers list. Best practice to use a Publication list.

Check Out These Resources!

http://help.marketingcloud.com/en/documentation/exacttarget/resources/system_guides/unsubscribes/
https://code.exacttarget.com/getting-started/sending-your-first-email/going-further-with-data-extensions.html
http://help.exacttarget.com/en/documentation/exacttarget/system_guides/unsubData Models When to Usescribes/
https://help.exacttarget.com/en-US/documentation/exacttarget/system_guides/unsubscribes/#What_Is_a_Master_Unsubscribe

Tracking and Reporting

This section of the exam has the following objectives:

- *Explain email analytics terminology*
- *Analyze individual email performance.*
- *Given a scenario, describe the reporting functionality and capabilities*

Email Analytics

When an email has been sent, metrics on how it has been performed are available in the Marketing Cloud.
Metrics available include:

- Total sent
- Delivery rate
- Bounces
- Total opens
- Opens
- Clicks
- Unique opens
- Unique clicks

Individual email results are found in the Email application in **Tracking**.
Basic tracking methods are available on the Overview page and detailed metrics are available when you drill down into a specific email.

Metrics on the **Overview** tab can be exported and viewed either in the browser or emailed.
To know which link received most clicks or to find out who clicked on a specific link, navigate to the **Click Activity** tab. Detailed information on who clicked on each link is available in the **Link View**.
In the **Job Links** tab, you can edit links in a specific job direct from your Marketing Cloud account after an email has been sent.

Reports

You can run reports asynchronously (you can continue working while the report runs off-screen).
Asynchronous reports are delivered to your email inbox or FTP server.
For some reports, you can also choose to run the report online and have the results appear on your screen.

Report results delivery options:

- **Save Report in my FTP folder**: Specify the name of the file so you can retrieve the report.
- **Email the Report results**: Attaches the report to an email message. Specify the email address to which to send the report, the subject line of the email, and a comment that appears in the body of the email. Select FTP delivery if the report you are running is large. You must have enhanced FTP enabled on your account to use reporting.
- **Display Report Results On Screen**: Runs the report while you wait and displays the report on your screen. Data-intensive reports cannot be displayed.

Check Out These Resources!

Reports 101 (Online course: 45 minutes)
http://help.exacttarget.com/en/documentation/exacttarget/tracking/reports/

External Email Integration

This section of the exam has the following objective:

- *Identify where to find information or help on APIs and the Marketing Cloud Connect*

Salesforce Sales and Service Cloud and the Marketing Cloud are integrated.
With Marketing Cloud Connect, you can easily segment data with Salesforce reports, send emails through the Sales and Service Clouds and Marketing Cloud and view tracking information in all three. You can get a complete view of how a contact, lead, or account views and responds to email campaigns with real-time email tracking data in Salesforce.
Information about API can be found at code@ - code.exacttarget.com