Quick Study Tips

Spend time on **Trailhead** especially the longer drawn out **Help pages** and go to the **PDF links** in **Trailhead** they will have nuggets of information that are helpful in the exam.

It's okay to forget things **even the most knowledgeable and experienced marketer** has to go back to documentation to make sure they are up to date.

There's **a lot of misinformation + older content** out there so before you lean on your foundational knowledge make sure you check the study guide.

A lot of what was relevant even a few short years ago doesn't matter due to **changes on the platform**.
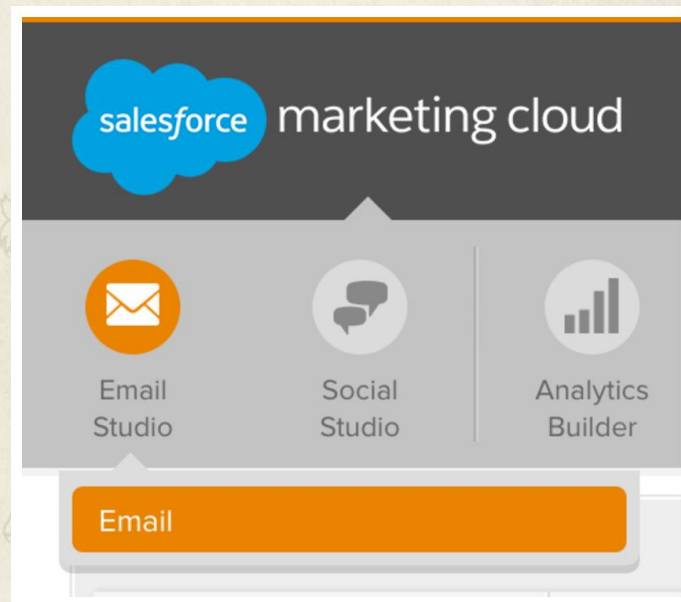
Do you remember this legacy UI?
If not, that's okay – that's why you're here!

Let's cover these sections in this presentation:

- **Email Marketing Best Practices**

- **Compliance**

- **Marketing Cloud Einstein**

- **Deliverability**

- **Reporting (Tracking & Datorama) & Strategy**

Email Marketing Best Practices

It has been around for decades. When was the first marketing email sent?

Initial Set Up

Before you get to start on creating the email campaigns make sure you've got the sender profiles set up. What you will use to send the campaigns.

What comes with a **Sender Authentication Package (SAP)?**

SAP uses four main tools to vouch for your email messages as timely and relevant communications.

Private dedicated domain (sfmc.trailblazers.com), custom account branding (hello@sfmc.trailblazers.com), Dedicated IP address, Custom Domain for Cloud Pages, Reply Mail Management (RMM).

This also includes DKIM which is very handy.

Initial Set Up

Private dedicated domain: sfmc.trailblazers.com

Custom account branding: hello@sfmc.trailblazers.com

Dedicated IP address (#)

Custom Domain for Cloud Pages:
Preference Center & Landing Pages

Reply Mail Management (RMM): Email response.

Marketing Cloud only makes DNS changes that are required for SAP setup solely within Marketing Cloud. This policy applies to what is required for any other SAP use. If the domain needs to be purchased, you must purchase it.

Initial Set Up

Create Sender Profiles, Delivery Profiles, and Send Classifications

Create Sender Profiles
Sender profile standardizes the FROM name and email address you use for email send

Delivery Profiles
Sender profile includes the From information for your sends, the delivery profile includes some important message information for each send

Send Classifications
CAN-SPAM classification of Commercial or Transactional

Create Your Effective Email

Before you send, create the subject lines and don't ignore preheaders!

Many brands, due to lack of knowledge internally, may miss the preheaders but this is a great space to finish telling your story and categorize whether the message is a **commercial or transactional message**.

Make emails relevant using personalized, dynamic content utilizing AMPscript or dynamic content block for example.

Think like a subscriber, while **personalization is important** be thoughtful to get good engagement.

Craft effective Calls to Action (CTA) links which can be <u>text</u> <mark>highlighted text</mark> or buttons

Create Your Effective Email

Make the subject lines + don't ignore pre-header:

Create effective subject lines.
Make it fun or simply informative. You want the audience to come back.

Create effective preheaders.
Supports the SL, test different preheader lengths and how they appear on different devices and limit the preheader to about 100 characters.

Make emails relevant using personalized, dynamic content.
Not just using content builder but think about what will get your audience engages. What's the messages value proposition?
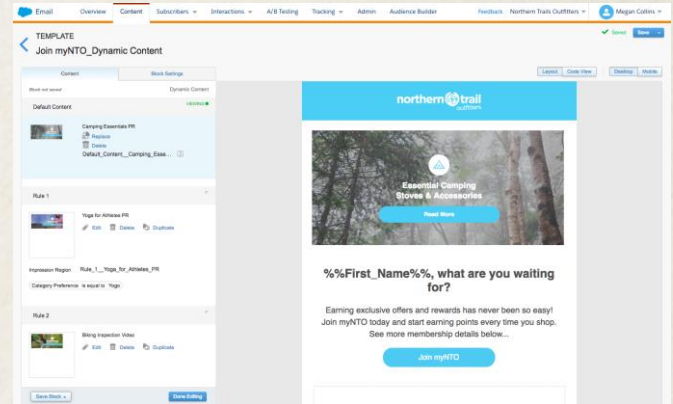
Methods to Acquire New Subscribers

Subscribers will consent to these marketing methods:

Mobile
Websites
Single opt in vs
Double opt in
Sales & customer service calls
In-store promotion

Compare Your Options

Which industry are you in or what industry is your client in?

No matter what method is chosen: You will need to gain trust in your newly acquired subscribers, making sure you communicate in a timely manner.
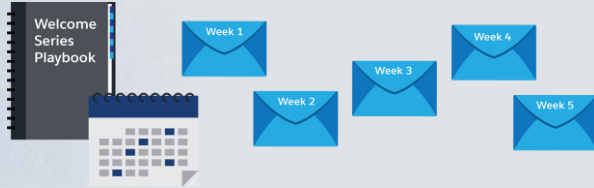
Methods to for Engagement

Keep Your Customers Happy:
All interactions are memorable, make it count.

Don't Force It:
Newsletter resurgence is coming out of quality writing.

Offer Incentives:
Make them excited but without the (!?) points.

Make a Good First Impression:
How does the email look like?

Plan Content Carefully:
Welcome Series

Personalize It:
Read your data first and have a good data
policy behind it.

Compliance

U.S. Laws like CAN-SPAM which serve as compliance guidelines for emails and other forms of marketing.
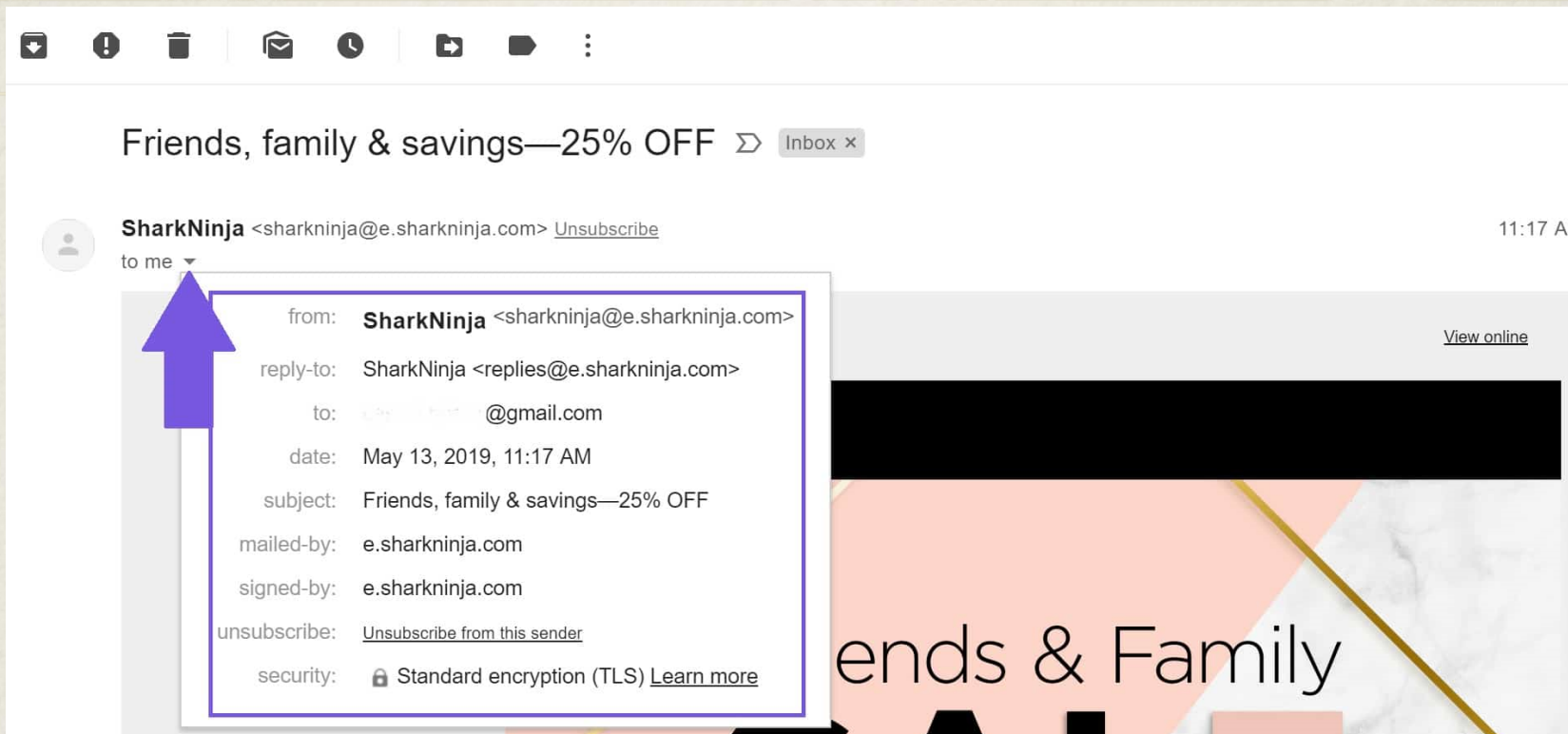
Compliance: CAN-SPAM

Definition: **CAN-SPAM stands for Controlling the Assault of Non-Solicited Pornography and Marketing Act 2001**. Enforced by the Federal Trade Commission here in the U.S.

1. Accurately identify the **sender in the header information**.

2. Use a **subject line that accurately represents the content of the email**.

3. Identify the message as an **advertisement**.

4. Include your **physical mailing address**.

5. Honor **opt-out requests promptly**. Process an unsubscribe request within **10 days** and keep your **unsubscribe mechanism operational for at least 30 days after the mailing**.

6. Provide an opt out. You cannot require a subscriber to log in/visit more than a single page to **unsubscribe**.

Compliance: Data Protection & Privacy Tools

Depending on where you are located marketing activities could be subject to different regulations, such as CCPA, GDPR or CASL or even something else but the exam will mainly focus on CAN-SPAM act itself.

Marketing Cloud provides the following tools below so that if you need to utilize them you can create your compliance plan based on these principles:

Consent Management: Ensure that you obtain consent for all marketing activities, prevent tracking + profiling of contacts who request that action.
Data Deletion: Helps you remove contact and other personal information from Marketing Cloud when a contact or data subject requests that action.
Data Portability: Helps you provide a copy of contact information to a contact who requests that action.
Restriction of Processing: Helps you prevent processing of contact data for legal reasons.

Available in wide range of apps and several APIs and it can be used in various ways but consult legal team first.

Compliance: Directly Control Compliance Settings in Email Studio Setup

Avoid delays in standing up email campaigns while adhering to **CAN-SPAM laws** (or equivalent local regulations).

Administrators can now set up **Profile Link Check**, **Physical Address Check**, and **Unsubscribe Link Check** by business unit. Previously, customers called support to have these options disabled.

Where is this? **Email Studio**

How can I make this edit? Admins on platform can enable or disable the respective compliance check in **Email Studio Setup** by going to the Email Optional Features section.

Email Deliverability Best Practices

○ **Get consent**: Email list capture process and recommendations on opt-in method
○ **Use branding:** Email From address branding
○ **Use email subject line branding and optimization**
○ **Avoid common words + phrases targeted by spam filters***
○ **Get consent again:** List hygiene with services and doing good content
○ **ISP compliance:** By doing good IP warm-ups and not hitting your lists
○ Volume filter avoidance
○ **SMTP log filtering** to proactively detect blocking

*there is a lot of misinformation about this one.

• The use of certain words
• Links to sketchy websites
• Messages in ALL CAPS
• Colorful and different sized fonts
• Broken HTML code
• Emails without an unsubscribe button

• Scams
• Gimmicks
• Schemes
• Promises
• Free gifts

Trailblazer
COMMUNITY GROUPS

Compliance: GDPR

Privacy as a Fundamental Right: Law went into effect 2018 and is far stricter than many throughout the world. Principles surrounding this are below since this was created it inspired other countries and even US states.

Emphasizes the following:

Fairness and Transparency

Purpose Limitation

Data Minimization

Accuracy

Data Deletion

Security

Marketing Cloud Einstein

Learn about it, turn it on + see what's inside and what works for the program you're working in!

Types of Einstein You'll Need to Know

Einstein Send Time and Frequency Optimization:
Journey Builder + Automation Studio, engagement data.

Einstein Copy Insights: For email subject lines.
Ex. Universal use cases and useful in any scenario.

Einstein Content Selection: Works in Content Builder
leveraging your assets using rules you set up using
attributes. Ex. Simpler commercial real estate site.

Einstein Email & Web Recommendation:
Define key Einstein Recommendations terms
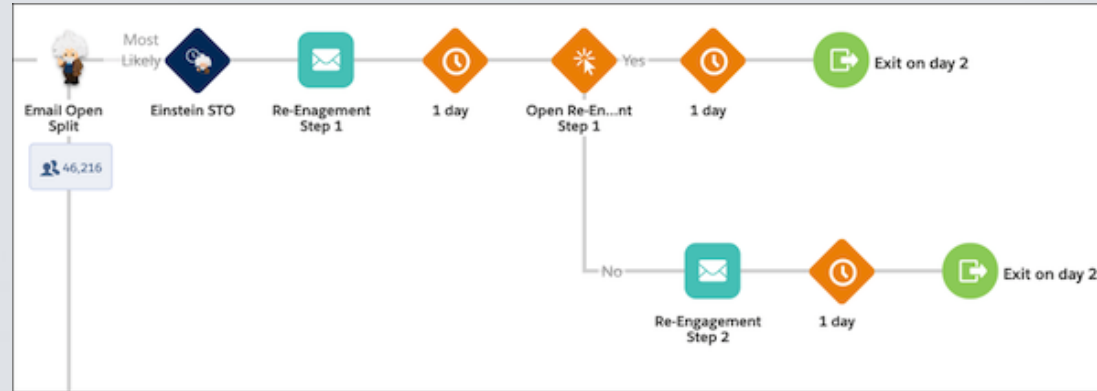and attributes. Ex. Ecommerce site.
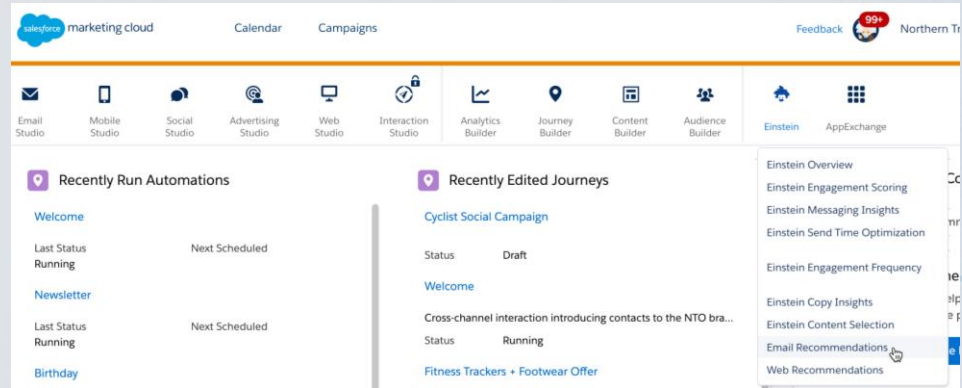
Types of Einstein You'll Need to Know

Einstein Messaging Insights: Alerts you to changes in your marketing performance no matter where you are in the Marketing Cloud.

Engagement Scoring: Predicts consumer engagement with email and Mobile Push messaging.

Einstein STO on Journey Builder.

Deliverability

IP warming and all that black box stuff.

Deliverability: Some Terms to Know

Phishing

Phishing is impersonating a trustworthy source to criminally and fraudulently acquire sensitive information, such as usernames, passwords, and credit card details.

Spoofing

Spoofing is falsifying information in an email message; for example, using a fake "From" address.

Email Authentication

Email authentication is a process that confirms an email is not forged and is from the organization who owns the provided domain name. This process allows an ISP to block known spammers as well as to approve email from reputable domains. This process varies by ISP, with some ISPs being stricter than others.

Deliverability: Some Terms to Know

Sender Authentication Package (SAP)

An SAP is purchased from Salesforce and includes a collection of products, including a private domain with link and image wrapping, a dedicated IP address, and reply mail management (RMM).

Security Socket Layer (SSL)

SSL encrypts communications between networks, allowing sensitive information such as credit card numbers, Social Security numbers, and login credentials to be transmitted securely. While not related directly to email deliverability, SSL (HTTPS) links are considered best practice and are often required by large retailers and corporations. Not having SSL on landing pages and clickable URLs can negatively impact deliverability.

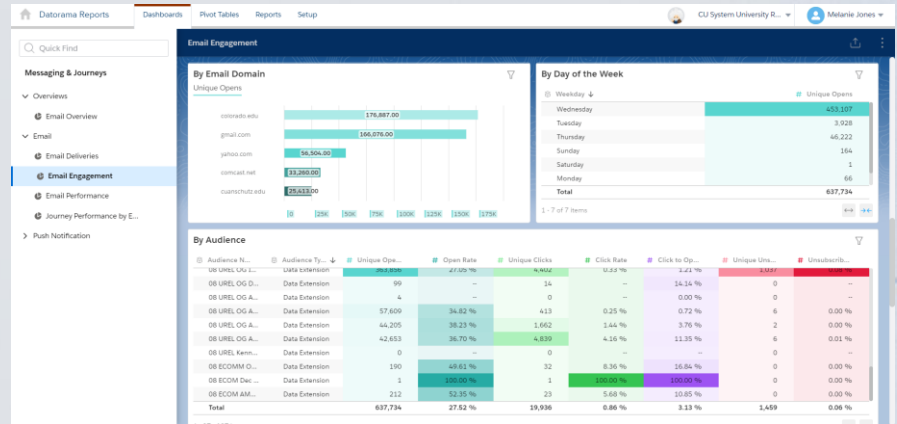# Reporting + Strategy

The double trouble of the email world.
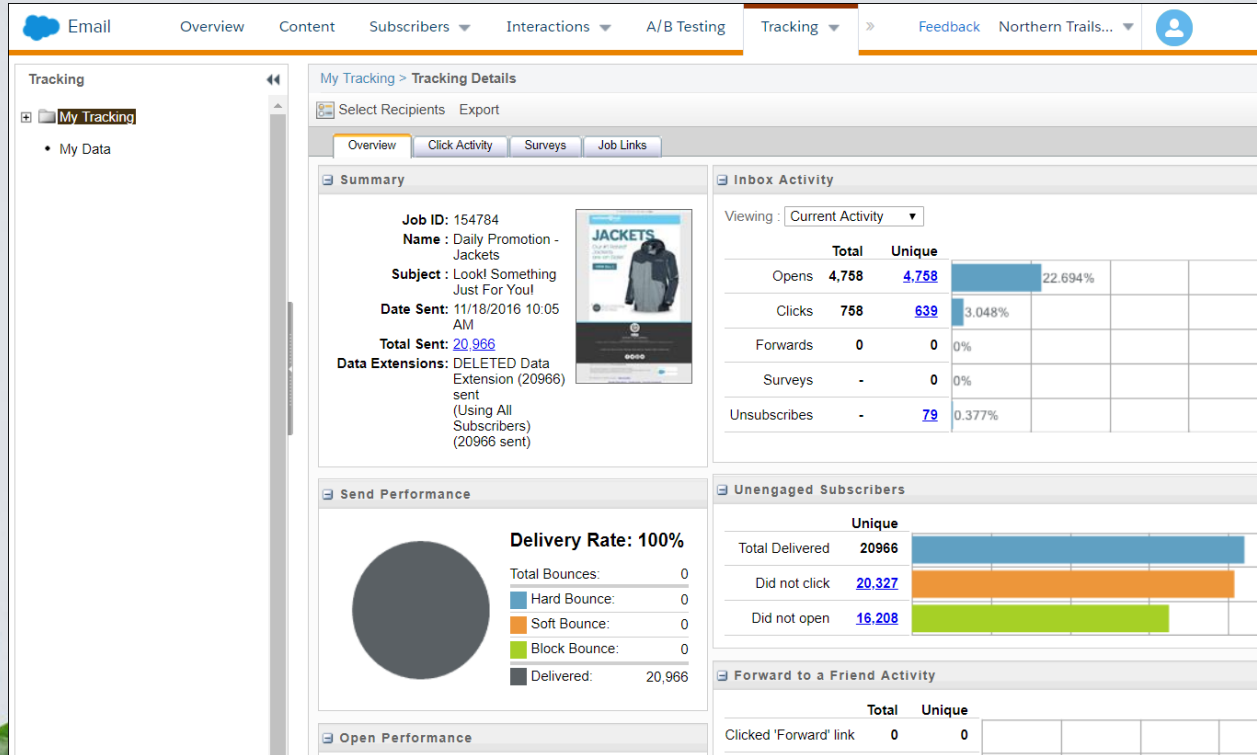
Reporting (Tracking & Datorama)

Reporting today, in 2022, has changed significantly in just these few past releases.

Datorama Reports enables users to generate, view, and share a detailed analysis of Email data. It also includes dashboards, pivot tables and reports.

Ex. **Overview, Engagement** and **Performance**.

Reporting (Tracking & Datorama)

Strategy: Email Keeps Changing

Know when an ad-hoc campaign is not the right call and when to automate an **email campaign**.

Know what data points and clues are to make your next campaigns like more engagement with one CTA vs another CTA when an A/B Test is ran.

How to segment your audience and **when is the right time for you to make a query or use the user interface.**
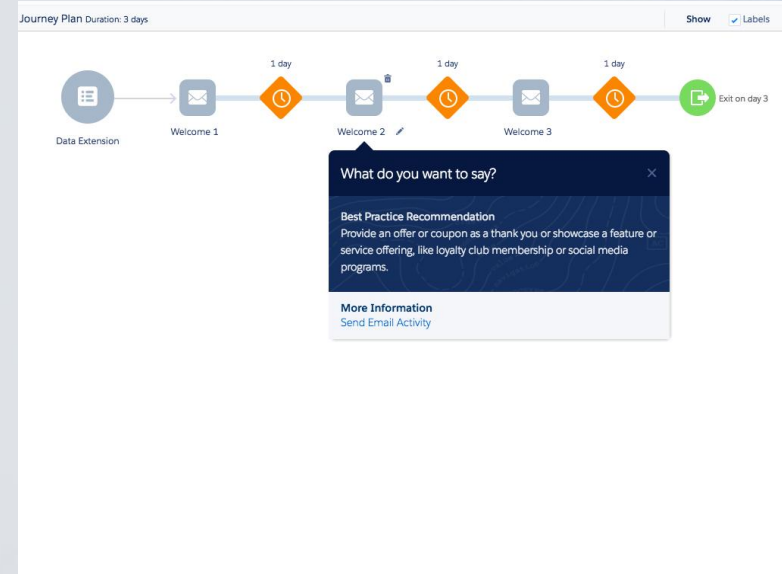
Q & A

Let's chat!

Links for Studying Email Marketing Best Practice

○ _Active Campaign_: Spam Words
○ Salesforce: Data Protection Control
○ _Salesforce:_ Email Marketing Best Practices
○ _Salesforce Help_: A/B Testing
○ _Salesforce Help_: Personalization Strings
○ _Salesforce Help_: Dynamic Content
○ _Salesforce Help:_ Create a Dynamic Subject Line and Preheader
○ _External Site_: 100 Best Email Subject Lines
○ _Trailhead_: Marketing Content Creation
○ _Trailhead_: AMPscript for Marketers
○ _Video_: How Salesforce Uses Dynamic Email to Drive Real Pipe

Links for Studying Email Marketing Best Practice

- ○ *Salesforce:* Email Marketing Best Practices
- ○ *Salesforce Help*: A/B Testing
- ○ *Salesforce Help*: Personalization Strings
- ○ *Salesforce Help*: Dynamic Content
- ○ *Salesforce Help:* Create a Dynamic Subject Line and Preheader
- ○ *External Site*: 100 Best Email Subject Lines
- ○ *Trailhead*: Marketing Content Creation
- ○ *Trailhead*: AMPscript for Marketers
- ○ *Video*: How Salesforce Uses Dynamic Email to Drive Real Pipe