



# Preference Center Development Best Practices

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# Agenda

Preference Center Overview

Managing Preferences in Salesforce Marketing Cloud

Cloud Pages Overview

Preference Center Development Best Practices

Final Considerations

Q&A

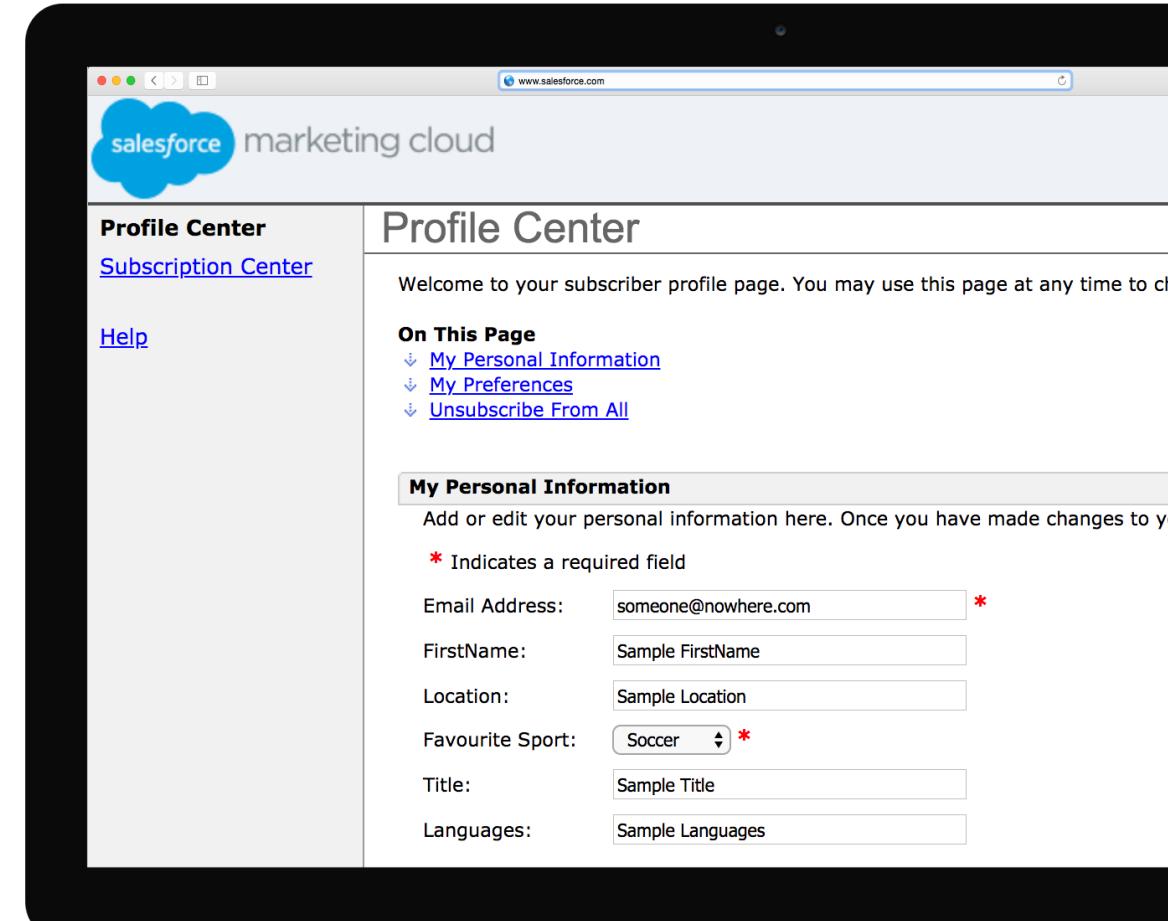
# What's a Preference Center?

Page or collection of Pages to allow your Customers to choose what type of information they want to receive about your brand, in what format and how often.

The screenshot shows a tablet displaying the Skaggs School of Pharmacy website. The top navigation bar includes links for About Us, Admissions, Programs, Departments, Research, Current Students, Faculty/Staff, and Blog. Social media icons for Facebook, Twitter, LinkedIn, and YouTube are also present. The main content area is titled "Manage Your Preferences". It features fields for Email Address, First Name, and Last Name, each with a corresponding input box. Below these, there is a section titled "Publication Lists" with two checkboxes: "Skaggs School of Pharmacy Events" and "Skaggs School of Pharmacy Communications".

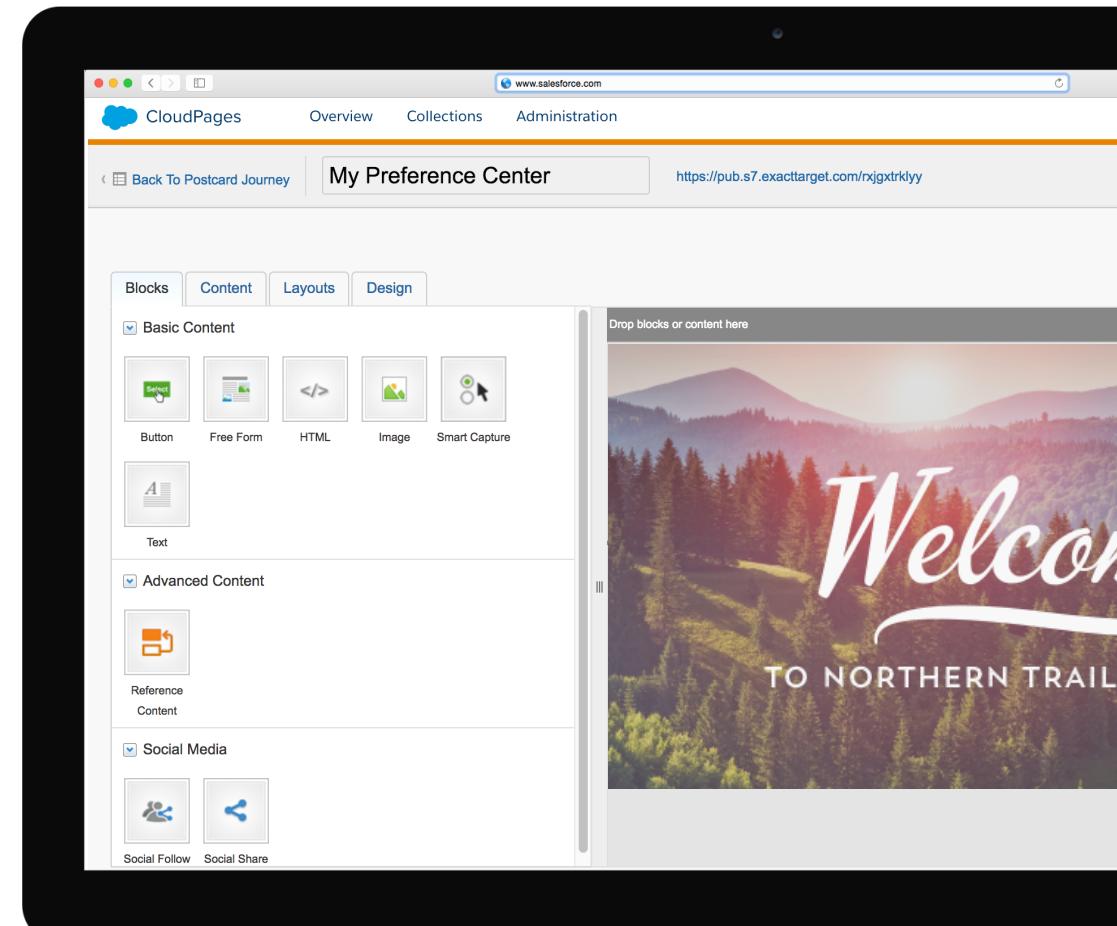
# Managing Preferences in Salesforce Marketing Cloud

- Related to Profile Attributes, Lists and Publication lists in Email Studio
- Branding options include: top logo and basic color scheme
- Oriented for Desktop only
- Separates concept of Profiles and Subscriptions



# Cloud Pages Overview

- Create personalized landing pages or microsites
  - Utilize the power of Programmatic languages like AMPScript or SSJS
  - Collect data directly in Salesforce Marketing Cloud
  - Comply with specific regulations or security standards (GDPR, CASL, etc)
- <https://www.salesforce.com/gdpr/marketing/>





# Best Practices

# Number 1. Understand Key Requirements



## Preference Center Discovery Questionnaire

Prepared for [Client Name]

### Introduction

Preference (or sometimes called Profile) centers built with Salesforce Marketing Cloud can run the range of project complexity from easy to complicated, depending on the business and IT requirements needed.

This article lists questions used in the preliminary Discovery phases of the project in order to come up with proper estimates, expectations, and project timelines.

### Questionnaire

1. Do you currently have a Preference Center built?
  - a. If yes, who built it?
  - b. If yes, what technology is it built with?
  - c. If yes, would you like to leverage any pieces of the current Preference Center?
2. Do you have any thoughts on how you'd like the interaction with the Subscriber to flow? (i.e. subscriber receives an email and lands in the landing page directly, etc.)
3. Would you like this Preference Center to live on a separate Microsite or would this Preference Center live inside your website? (i.e. inside a "My Account" section)
4. Can you indicate if there will be multiple Preference Centers built?

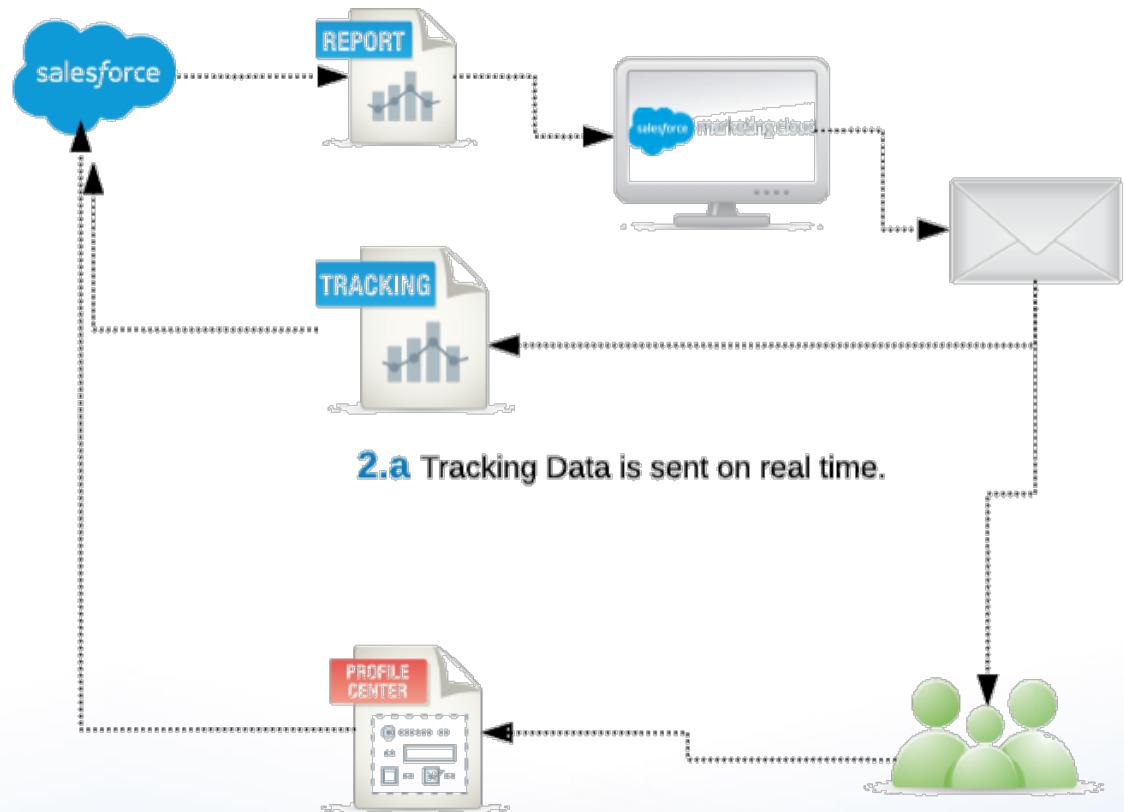
1. How will the preference center be accessed?
2. What information can the customer update?
3. Do you have any multi-language requirements?
4. Do you have to integrate with external systems? (i.e: CRM, CMS, etc)
5. How often will the preference center content change?
6. Do you need to support multiple BUs?



# Number 2. Think and Design your Data Structure



1. Salesforce Send is originated from Marketing Cloud using a report or campaign



**2.a** Tracking Data is sent on real time.

2. Subscriber access custom preference center, connected to SFDC to update custom fields per preference

3. Custom Profile Center updates custom fields on real time.

## Number 3. Encode information with CloudPagesURL



Write (you can ask support to replace %%profile\_center\_url%% with your code!):

```
%%=CloudPagesURL(777, 'language', 'EN')=%%
```

Read:

```
%%[  
set @sk = _SubscriberKey  
set @language = RequestParameter('language')  
]%%
```

# Number 4. Modularize with Content Blocks



Code in Profile Center Page:

```
%%=ContentBlockByName(Concat('Content Builder\',@brand,'\',@language)=%%
```

Structure in Marketing Cloud:

Content Builder

Feedback Pato Sapir ▾ Pato Sapir ▾

Import + Create ▾

Content Builder

LOCAL SHARED

Pato Sapir

LOCAL FOLDERS

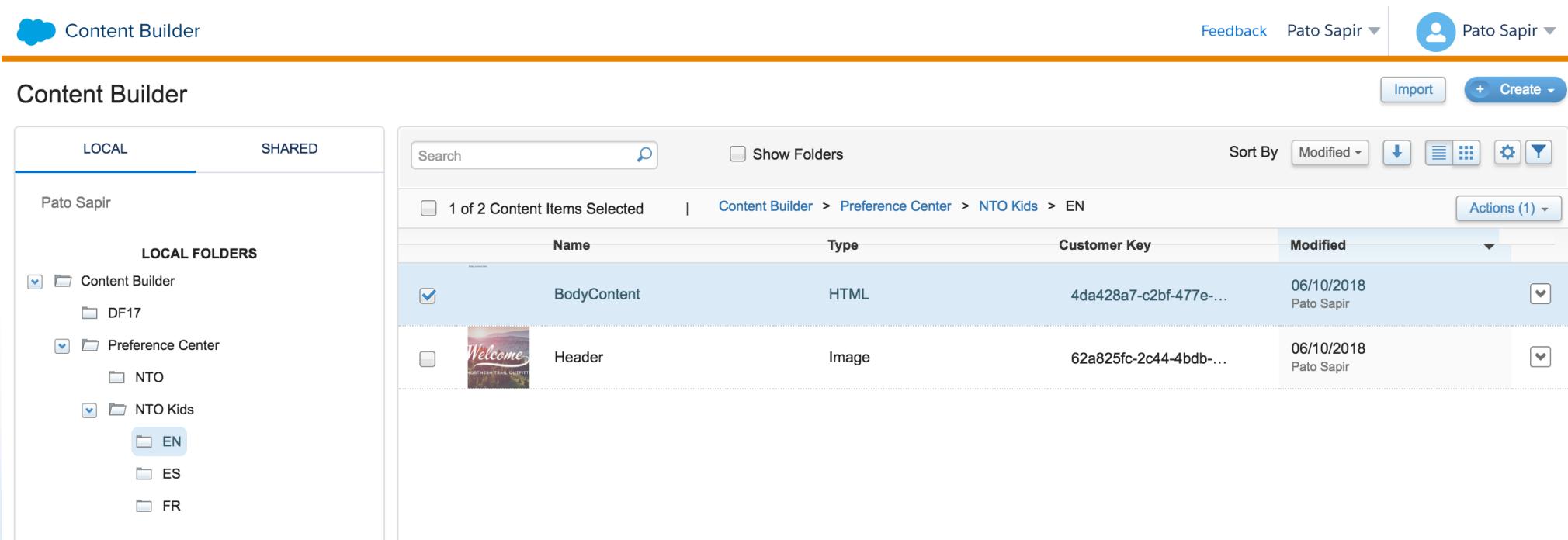
- Content Builder
  - DF17
- Preference Center
  - NTO
- NTO Kids
  - EN
  - ES
  - FR

Search  Show Folders

Sort By Modified ▾

Name	Type	Customer Key	Modified
BodyContent	HTML	4da428a7-c2bf-477e-...	06/10/2018 Pato Sapir
	Header	62a825fc-2c44-4bdb-...	06/10/2018 Pato Sapir

Actions (1) ▾



# Final Considerations



- Think carefully about the Email Address update Flow
- RESTful Preference Center Considerations
- Evaluate hosting options

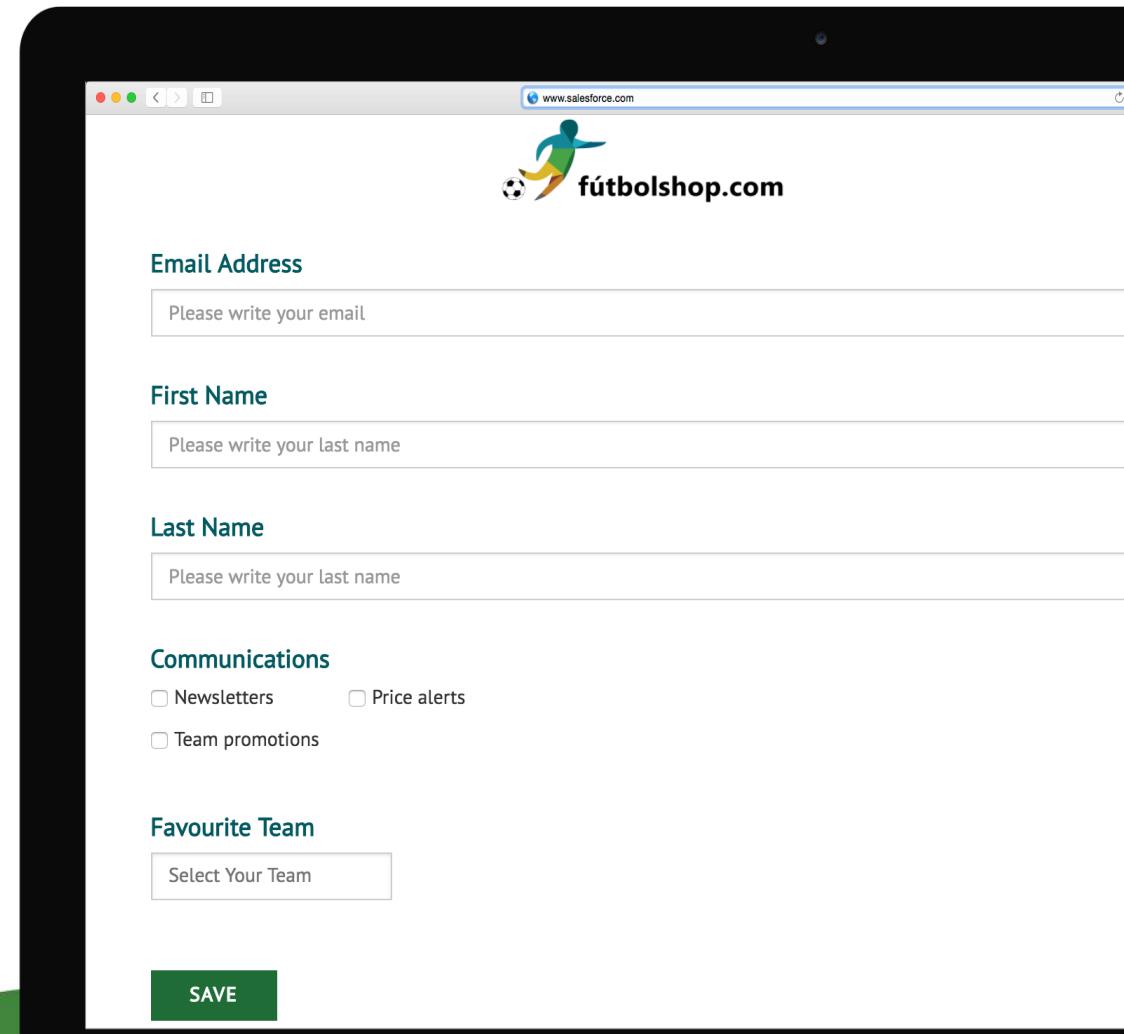
Hosting in Cloud Pages	Hosting externally	Hosting in Heroku
Single point of Failure	Multiple points of failure	Multiple points of failure
Code is integrated with Sales and Marketing Cloud	Have to integrate using APIs	Can leverage Heroku Connect to integrate with Salesforce
Requires knowledge in AMPScript or SSJS	Can leverage other programming languages	Can leverage other programming languages
No hosting maintenance required	Maintenance required	Some maintenance can be automated with auto-scale options

# Contact us to learn about our PrefCenter Framework!

info@devsutd.com

## Features:

- Multi-language
- Multi-Brand & Multi-Business Unit
- Configurable Content
- Secure
- 100% hosted in Cloud Pages
- Connected to Sales Cloud objects or Data Extensions
- Email Address change flow included
- Additional attributes with auto-complete features
- Fixed price and configurable in days



# Thank You

