



# Marketing Cloud Data Model Optimization Strategies

Data architecture considerations  
and best practices

Eliot Harper, AttributeValue  
[eliot@eliot.com.au](mailto:eliot@eliot.com.au), @eliotharper



# Agenda



Data Models

Contact Model

Data Transformation and Segmentation

Connecting The Clouds





# Data Models

# Data Models: All Subscribers



Identifies the status of a Subscriber

Optionally store data related to the Subscriber

## Considerations

- Limited data types
- Profile attributes are defined globally
- One-to-one relationship

## Best Practices

- Subscriber Key is the system of record: use a unique identifier
- Subscriber Filters should not be used for segmenting large number of records
- Store non-text profile attributes in Data Extensions



# Data Models: Lists



Convenient method of audience segmentation

Stores a Subscriber's subscription status

## Considerations

- Can only contain Subscriber records
- No overwrite option
- Not re-subscribed to list after All Subscribers status changes
- Cannot be shared across Business Units

## Best Practices

- Use if you require simplicity
- Do not use to segment large number of Subscribers



# Data Models: Data Extensions



Relational database

Permission-based access

## Considerations

- Row limit of 8,060 bytes
- Referential integrity is not enforced
- AMPscript DE functions (except Lookup) executed in single call

## Best Practices

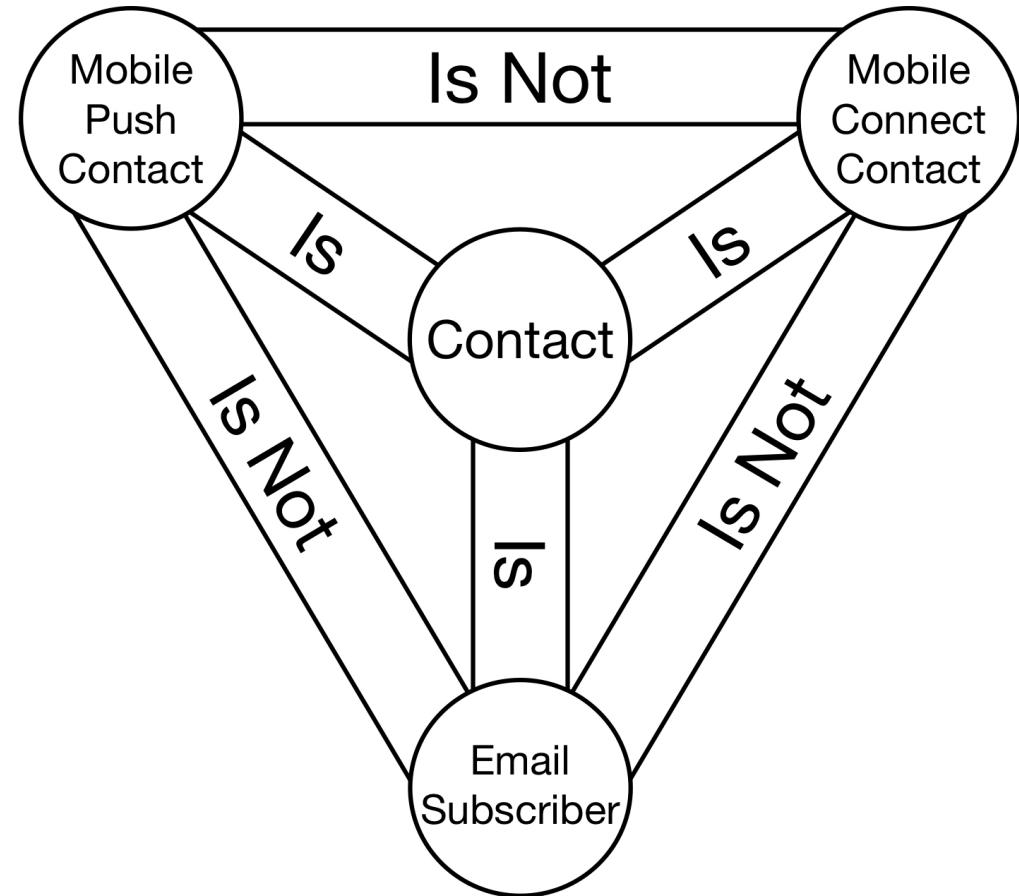
- Only import the data you need
- Assign Primary Keys or Composite Keys
- Use Publication Lists for audience-level opt-ins
- Assign appropriate data types and field lengths





# Contact Model

# The Consubstantial Contact



# Contact Model



Provides a single customer view

Derived from a Population

## Considerations

- Contact models are specific to Business Units
- Contact model != Database Contact

## Best Practices

- Use Primary Keys when creating relationships in between Attribute Sets
- Contact Key must match Subscriber Key
- Do not create relationships against the Contact ID
- Limit Populations to no more than three





# Data Transformation & Segmentation



# Data Transformation & Segmentation



Automation Studio enables ETL processes

Creates targeted audiences which can be used as Journey entry sources

## Considerations

- Not a replacement for a data warehouse
- Consider using Marketing Cloud with another ETL tool

## Best Practices

- Only import or transform deltas
- Avoid executing Query activities concurrently against the same DE
- ‘JOIN’, ‘WHERE’, ‘GROUP BY’ and ‘ORDER BY’ clauses should be isolated to Primary Key fields
- Reduce complexity of SQL queries





# Marketing Cloud Connect

# Marketing Cloud Connect



Managed Package for Sales and Service Cloud

Enables synchronization of data schemas and relationships from Objects

## Considerations

- Salesforce Objects use a different relationship model
- Only the data schema is synchronized
- Leads and Contacts are treated as different Subscribers
- Email address changes are not synchronized in All Subscribers
- Understand the behaviour of synchronized DE filters

## Best Practices

- Create an automation to update email addresses of Leads and Contacts
- Create an automation to remove deprecated Leads
- Create an automation to update Subscriber status of converted leads



Contact\_Salesforce

Contact

OVERVIEW ACTIVITY

**2015**

Records Synchronized

EXTERNAL KEY

Salesforce00D6F000001PeZRUAOContact

CREATED

November 26th 2017, 4:42 pm

ATTRIBUTE SET

Contact\_Salesforce

## Configure Synchronization

Edit

RECORDS COLLECTION

All records with EH\_Synchronise\_SFMC\_\_c equal (=) True

POLL SCHEDULE

15 minutes

## Synchronized Fields (54)

## Field

## REQUIRED

AccountId

Id

CreatedById

EH\_Member\_Name\_\_c

Email

HasOptedOutOfEmail

LastModifiedById

EH\_Lead\_Name\_\_c

**15 \$1 MILLION****14 \$500,000****13 \$250,000****12 \$100,000****11 \$50,000****10 \$25,000****9 \$16,000****8 \$8,000****7 \$4,000****6 \$2,000****5 \$1,000****4 \$500****3 \$300****2 \$200****1 \$100**

What happens when a boolean value  
is updated for a synchronised SF Object record?

**A** Record is deleted in the Sync DE**B** Record is disabled in the Sync DE**C** Subscriber is deleted in All Subs**D** Nothing

Contact\_Salesforce

Contact

OVERVIEW ACTIVITY

**2015**

Records Synchronized

EXTERNAL KEY

Salesforce00D6F000001PeZRUAOContact

CREATED

November 26th 2017, 4:42 pm

ATTRIBUTE SET

Contact\_Salesforce

## Configure Synchronization

Edit

RECORDS COLLECTION

All records with EH\_Synchronise\_SFMC\_\_c equal (=) True

POLL SCHEDULE

15 minutes

## Synchronized Fields (54)

## Field

## REQUIRED

AccountId

Id

CreatedById

EH\_Member\_Name\_\_c

Email

HasOptedOutOfEmail

LastModifiedById

EH\_Lead\_Name\_\_c

**15 \$1 MILLION****14 \$500,000****13 \$250,000****12 \$100,000****11 \$50,000****10 \$25,000****9 \$16,000****8 \$8,000****7 \$4,000****6 \$2,000****5 \$1,000****4 \$500****3 \$300****2 \$200****1 \$100**What happens when a boolean value  
is updated for a synchronised SF Object record?**D Nothing**

# Marketing Cloud Connect



Managed Package for Sales and Service Cloud

Enables synchronization of data schemas and relationships from Objects

## Considerations

- Salesforce Objects use a different relationship model
- Only the data schema is synchronized
- Leads and Contacts are treated as different Subscribers
- Email address changes are not synchronized in All Subscribers
- Understand the behaviour of synchronized DE filters

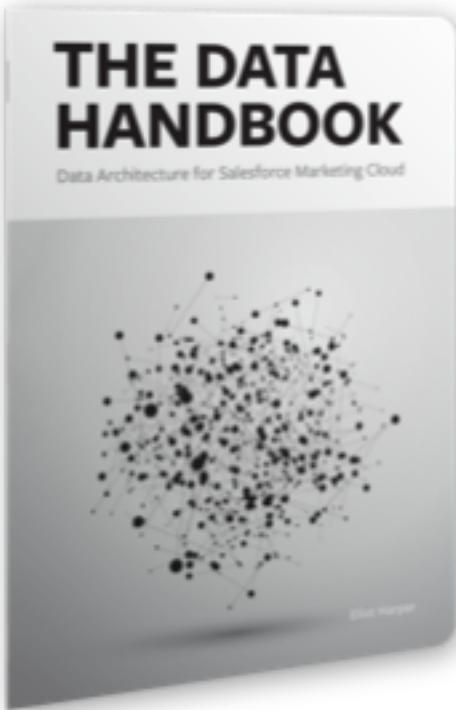
## Best Practices

- Create an automation to update email addresses of Leads and Contacts
- Create an automation to remove deprecated Leads
- Create an automation to update Subscriber status of converted leads



# Download the eBook

[getstride.com/datahandbook](http://getstride.com/datahandbook)



# THANK YOU

