



Lesson 8

## Course Wrap



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## Course Roadmap



LESSON 1:  
Intro  
to the MC

LESSON 2:  
Administration  
Essentials

LESSON 3:  
Data  
Management

LESSON 5:  
Testing,  
Delivery, & Best  
Practices

LESSON 4:  
Email Message  
Design & Creation

LESSON 6:  
Marketing  
Automation

LESSON 7:  
Analytics &  
Troubleshooting

LESSON 8:  
Course Wrap

Congrats!

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## Lesson Objectives

By the end of this lesson, you will be able to:

- Review key concepts from the course.
- Apply what you know to revise a marketing campaign.
- Discover available resources to help you succeed as a Marketing Specialist.



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## Course Wrap

Lesson Topics

1. Final Course Review
2. Capstone Project Requirements
3. Where to Go for More Resources



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## Contact Builder Tools



Contact Builder has several tools to help manage contact data for use in building 1:1 relationships:

- **Contacts Configuration.** Determine how Contact Builder processes imported contact information.
- **Data Designer.** Define information about your contacts and relate that data directly to the contact record by linking data extensions.
- **Data Extensions.** Create and manage the data extensions that hold contact information.
- **Imports.** Create the processes that move contact information into your data extensions.
- **Data Sources.** Visualize where your contact data originates and assign attributes to those sources.



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## What is a Data Extension?



SubscriberKey	EmailAddress	First_Name	Last_Name	Gender	DOB	Address1	Address2	Zip	Language	Mobile_Number
224880033	mhashel.2248...	Meher	Hashel	M	7/18/1971 12:0...			48369	English	12485554800
224880034	rbana.224880...	Rachell	Bana	F	8/10/1978 12:0...			58814	English	
224880035	jcalabrese.224...	Jamie	Calabrese	F	6/29/1956 12:0...			63861	English	
224880036	dracy.224880...	Chang	Tracy	M	1/20/1939 12:0...			32535	English	
224880037	educkett.22488...	Emory	Duckett	M	11/28/1955 12:0...	2151 Dow Court		48854	English	
224880038	glockess.2248...	Grady	Lockess	M	7/20/1955 12:0...			58205	English	17015558707
224880039	mpolish.22488...	Steve	Polish	M	8/18/1953 12:0...			23887	English	15715552404
224880040	choudman.224...	David	Choudman	M	8/30/1998 12:0...			86220	English	
224880041	mcwhittem.224...	Rico	Whittem	F	11/16/1978 12:0...			82217	English	13075557819
224880042	gordman.2248...	Jerrel	Gordman	M	8/29/1958 12:0...			28146	English	
224880043	mcpland.22488...	Roberto	Mcpland	M	1/29/1973 12:0...	401111111 Avenue		01146	English	
224880044	ldobson.2248...	Kathleen	Dobson	F				88567	English	12085552373
224880045	medross.22488...	Lamar	Medross	M	10/10/1972 12:0...			61280	French	
224880046	mcclerman.22...	Garrett	Mcclerman	F	8/29/1956 12:0...			58545	French	
224880047	hubbard.22488...	Herbert	Luhwig	M	6/30/1901 12:00...			58020	English	
224880048	gibson.22488...	Gene	Gibson	M	1/20/1905 12:00...			88260	English	8805554143

Data Extension



A table in the Marketing Cloud that stores data for Marketing campaigns.

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## Data Designer



- ✓ Consolidate and organize data from any source.
- ✓ Build data relationships.
- ✓ Relate the data to the contact record using Attribute Groups.
- ✓ Use the data to drive customer journeys.
- ✓ Use the Customer ID from a contact record to link to another data extension that contains product and shipping information.



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## What is an Attribute?



### Definition

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Attributes represent a single piece of information about a contact.

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Two types of attributes:

1. Profile Attribute: Data about the subscriber.
2. Preference Attribute: A choice for a declarative statement.

For example: Do you wish to receive HTML emails? Value stored is a Boolean value.



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# Segmentation



## Definition

Dividing your subscriber lists so that you can target individuals with specific, relevant, and timely messages—messages that stand out in inboxes and grab your customers' attention.



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# Email Design Best Practices



**Make it easy to unsubscribe.  
Always test your emails.**

**Make it personal.  
Optimize for mobile.**

## Images

- Design for the banner area to display a maximum of 600x150px
- Observe an image to text ratio of 80% text, 20% images
- Use relevant imagery
- If displaying text on image, use Live Text (this will require programmatic skills)

## Copy

- Write clear and concise copy – keep it simple
- Personalize subject lines and email content
- Minimize the use of spam words

### NOTE:

The weight of your emails should not exceed a total of 800KB.

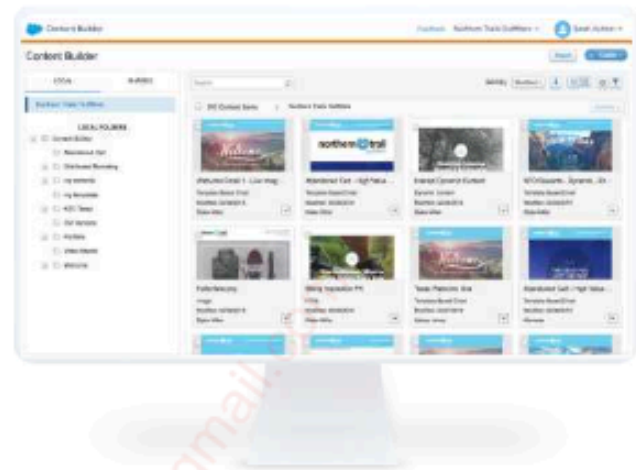
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## What can Content Builder do?



One place to store, search, edit, and personalize content across Email, SMS, and more.

- **Consolidate** images, content blocks, templates and emails in a single location.
- **Visualize** your content in a thumbnail view.
- **Manage** search and sort all of your content with filters and tags.
- **Store** and share pre-approved assets and templates to quickly build engaging emails.
- **Seamlessly integrate** content across channels.



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## Email Template Options

### Empty Template

Legacy templates. Content areas are empty, allowing for the most flexibility during the creation process.

### Basic Template

Pre-determined layouts that can be populated with a specific type of content. Based on industry best practices from our services team.

### Themed Template

Pre-formatted and styled templates enabling you to jumpstart the design process. All the templates were built using Content Builder editor to show what is possible without editing a single line of HTML.

**Now Available!**  
Templates are now built with accessibility in mind.

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## Making Email Personal: Dynamic Content



**Dynamic Content**



**Personalization  
Strings**



**AMPscript**

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## Ensure the Accuracy with Testing



Preview and Test desktop, mobile, and plain text testing features include:

- Static and subscriber-specific previews: Review personalization and business logic before sending.
- Test send thresholds: Test send up to five email addresses or a test data extension.
- Subject and preheader validation: Prevent "test", "draft", or "proof" related emails from being sent to a customer.

Testing tools available:

1. **Content Detective**
2. **Subscriber Preview**
3. **Test Send**



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## What is Marketing Automation?

- Automating repetitive marketing processes to simplify efforts.
- Sending the right message, to the right person, at the right time.
- Gives marketers time to focus on content rather than processes.
- Handle various interaction points automatically.



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## Journeys and Automations

Design and automate campaigns that guide customers through their journey with a brand. Execute simple or multi-step marketing and data management activities on an immediate, triggered, or scheduled basis.



### Automation Studio

- Schedule recurring Processes/Activities
- Data Digestion – Extract-transform-load
- Advanced Segmentation – SQL queries



### Journey Builder

- Automate 1:1 messaging at scale
- Deliver personalized content at the right time
- Multi-path/multi-channel messaging



### Triggered Emails/API

- Automatic response to a subscriber action

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## Course Wrap

### Lesson Topics

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2. Capstone Project Requirements
3. Where to Go for More Resources



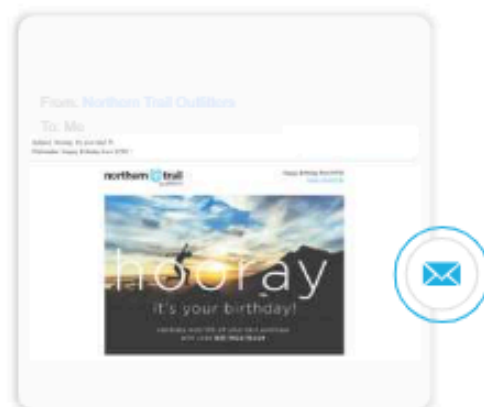
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## NTO Expands its Campaigns



The NTO marketing team wants to implement a new Birthday Campaign to reward loyal subscribers.

As the Marketing Specialist, you need to configure this new journey.



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## Requirements



- Create data structures (data extensions and attribute groups) for the campaign.
- Create emails for the campaign. Emails should include:
  - Personalization Strings with proper case.
  - Dynamic Content
  - At least one link to an external site (preferably [northerntrailoutfitters.com](http://northerntrailoutfitters.com))
  - At least one image
- Create a Journey for the campaign.
  - The journey will include various splits based on the campaign requirements in your exercise guide.
  - This campaign is an entirely new journey.

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Your Turn

## 8-1 Capstone



### Goal:

Create a new Birthday Campaign journey for NTO.

### Instructions:

Create the Birthday Campaign journey based on the provided requirements.



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## Course Wrap

### Lesson Topics

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## Further Resources



### The Trailblazer Community

- New Features
- Best Practices
- Community Group Meetings and Events

### Salesforce Help

- Release Notes
- Help Documentation
- Knowledge Articles
- Trailhead Modules

### IdeaExchange in the Trailblazer Community

- Suggest a new product concept by posting an idea.
- Promote your ideas that you want developed.
- Discuss with product managers and other users.
- Review future plans.

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## Certification Action Plan



- ✓ Access the Exam Guide at <https://trailhead.salesforce.com/help?article=Salesforce-Certified-Marketing-Cloud-Email-Specialist-Exam-Guide>
- ✓ Research unfamiliar topics from the Exam Outline section of the Study Guide using Help & Training.
- ✓ Take advantage of relevant courses and get hands-on experience (Help & Training | Other Resources | Training).
- ✓ When you're ready, set up a test taker account at [www.webassessor.com](http://www.webassessor.com) salesforce to register for the exam or attend a Certification Days Event.
- ✓ If at first you don't succeed, try, try again. Once certified, use your logo proudly and often!

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## Email Specialist Practice Exam



Think you're ready? Uncover your next steps with the Email Specialist Practice Exam. To register for the practice exam:

- Log in to [Webassessor](http://Webassessor).
- Click **Register for a new exam**.
- Expand the **Certified Practice Tests** section.
- Locate the exam called "Salesforce Marketing Cloud Email Specialist Certification Practice Test".
- And **Register!** The cost to register is USD 20.
- You can launch the exam from your Webassessor profile home page.



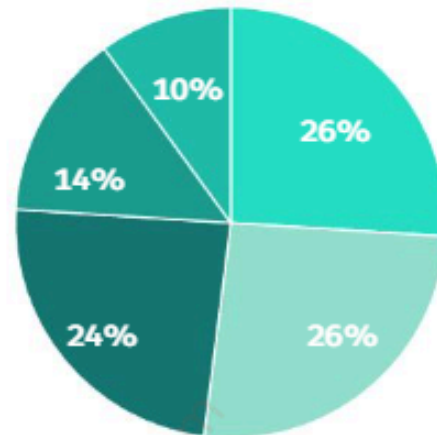
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## About the Exam



The Salesforce Certified Marketing Cloud Email Specialist credential is designed for individuals who want to demonstrate their knowledge, skills, and experience in:

- Building email marketing campaigns
- Building relational data models
- Sending emails
- Building email automations
- Creating reports and tracking data



- Email Marketing Best Practices (10%)
- Content Creation and Delivery (24%)
- Marketing Automation (26%)
- Subscriber and Data Management (26%)
- Insight and Analytics (14%)

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## About the Exam



Who is the best candidate for the exam?

**Six Months to a Year Experience With:**

- Executing both tactical and strategic email campaigns.
- Building an email marketing campaign.
- Using tools such as Email Studio, Content Builder, segmentation, automation, and tracking and analytics to make data driven decisions to optimize their email campaigns.

**Not Expected to Know:**

HTML, JavaScript, CSS, how to design or how to develop custom API Integrations, or know Account Engagement, formerly Pardot, tool.

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## About the Exam



### FAQ

- What is the format of the exam?
- How many questions are on the exam?
- How much time is allotted to complete the exam?
- What is the passing score for the exam?
- Can I reference any materials during the exam?
- Are there any prerequisites?
- How much does the exam cost?
- How do I know what to study?

Multiple Choice
60
90 minutes
67%
No
No
\$200 (\$100 for a retake)
The exam study guide

## Exam Logistics Information



### Onsite Proctored

- To locate a testing facility near you visit <http://www.kryteriononline.com/Locate-Test-Center>
- Testing centers set their own schedules for when Salesforce certification exams are offered, so availability varies
- Typically, exam registration is required at least 24-72 hours in advance; however, we recommend registering a week in advance



# Exam Logistics Information



## Online Proctored

- The exams will be monitored by a proctor through a webcam
- Online proctored exams are offered daily, excluding major U.S. holidays and exam system down-time
- Advance registration is not required for online proctoring; you can register and launch an exam on the same day; however, if you are completing an exam through online proctoring for the first time, please allow extra time to prepare your computer
- Before scheduling an online proctored exam, it is strongly recommended that you review all of the necessary requirements and policies here:  
<https://trailhead.salesforce.com/help?article=Online-Proctoring-Completing-Your-Exam-Remotely>

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# Thank You!



## Thanks for Attending!



Your opinion matters, and we want to hear from you. Navigate to the Class Survey provided to give us your feedback.

### What's Next?

#### LEARN ALL THE SKILLS YOU NEED

Build on your skills with self-paced learning or another expert-led class.

<https://trailhead.salesforce.com/academy>

#### EARN SKILL-BASED CREDENTIALS

Get rewarded for the skills you learn and get industry-wide recognition for your expertise.

<https://trailhead.salesforce.com/credentials/>

#### CONNECT WITH FELLOW TRAILBLAZERS

Community: <https://trailblazer.salesforce.com>

Twitter: @Trailhead

Facebook: /SalesforceTrailhead

## Training Feedback Survey – Please complete!



**Option 1:** Use this URL to complete the survey:  
<https://www.research.net/r/trailheadacademy>

**Option 2:** Use the QR code and complete the survey on your mobile device.



Use Survey ID provided by your instructor (format is TASM-#####) to answer to the first survey question.

**Thank you!**



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