



STUDENT GUIDE

Build and Analyze Customer Journeys Using Marketing Cloud

SF-MKT101-64.0v1-EN-SG



AGENDA

Build and Analyze Customer Journeys Using the Marketing Cloud (MKT101)



45 minutes	Welcome, Course Introduction, and Overview
30 minutes	Welcome to Northern Trail Outfitters <ul style="list-style-type: none">• <i>Join Me Intro: Log in (5 min)</i>
80 minutes	Introduction to the Marketing Cloud <ul style="list-style-type: none">• Describe Capabilities Across the Marketing Cloud<ul style="list-style-type: none">◦ <i>Watch Me 1-1 (10 min): Tour the Marketing Cloud</i>• Know Where to Go for Support<ul style="list-style-type: none">◦ <i>Join Me 1-2 (10 min): Marketing Cloud Trust Site</i>
90 minutes	Administration Essentials <ul style="list-style-type: none">• Account Setup<ul style="list-style-type: none">◦ <i>Join Me 2-1 (10 min): Tour User Preferences</i>• Sending Setup<ul style="list-style-type: none">◦ <i>Join Me 2-2 (10 min): Create a Send Classification</i>◦ <i>Your Turn 2-3 (10 min): Scavenger Hunt</i>
120 minutes	Data Management <ul style="list-style-type: none">• Contact Data<ul style="list-style-type: none">◦ <i>Join Me 3-1 (10 min): Tour All Contacts</i>• Data Extensions<ul style="list-style-type: none">◦ <i>Join Me 3-2 (15 min): Create the NTOAbandonCart Data Extension</i>◦ <i>Your Turn 3-3 (10 min): Create the NTOCartInfo Data Extension</i>
30 minutes	Wrap Up

AGENDA

Build and Analyze Customer Journeys Using the Marketing Cloud (MKT101)



30 minutes

Welcome and Review

120 minutes

Data Management

- Data Extensions
 - *Join Me 3-4 (10 min): Create an Import to the NTOAbandonCart Data Extension*
 - *Your Turn 3-5 Create an Import to the NTOCartInfo Data Extension*
 - *Join Me 3-6 (15 min): Create the Abandon Cart Attribute Group*
- Segmentation
 - *Join Me 3-7 (10 min): Create the LowValueCart Segment*
 - *Your Turn 3-8 (10 min): Create the HighValueCart Segment*
 - *Watch Me 3-9 (5 min): Refresh the LowValueCart Data Extension*
 - *Join Me 3-10 (15 min): Create the NTO Abandon Cart Query Activity*

185 minutes

Email Message Design and Creation

- Email Message Design
 - *Your Turn 4-1 (20 min): Review NTO's Welcome Email*
- Organizing Content
 - *Join Me 4-2 (5 min): Create Abandon Cart Campaign Folders*
 - *Your Turn 4-3 (5 min): Create Welcome Campaign Folders*
 - *Join Me 4-4 (10 min): Upload Abandon Cart Content*
 - *Your Turn 4-5 (10 min): Upload Welcome Content*
- Content Creation
 - *Watch Me 4-6 (20 min): Tag Abandon Cart Content*
 - *Your Turn 4-7 (15 min): Tag Abandon Cart Content*

30 minutes

Wrap Up

AGENDA

Build and Analyze Customer Journeys Using the Marketing Cloud (MKT101)



30 minutes	Welcome and Review
180 minutes	Email Message Design and Creation <ul style="list-style-type: none">● Content Creation<ul style="list-style-type: none">○ <i>Join Me 4-8 (20 min): Create the NTO Template</i>○ <i>Join Me 4-9 (20 min): Create the Complete Profile Content Block</i>○ <i>Join Me 4-10 (20 min): Create Dynamic Content Blocks</i>○ <i>Join Me 4-11 (30 min): Create NTO's Welcome Email</i>○ <i>Your Turn 4-12 (30 min): Create the Abandon Cart Low Value Email</i>○ <i>Join Me 4-13 (10 min): Create Abandon Cart High Value Email</i>
160 minutes	Message Testing, Delivery, and Email Marketing Best Practices <ul style="list-style-type: none">● Message Testing<ul style="list-style-type: none">○ <i>Join Me 5-1 (20 min): Create Test Data</i>○ <i>Join Me 5-2 (15 min): Test Abandon Cart Emails</i>○ <i>Your Turn 5-3 (10 min): Test the Welcome Email</i>● Message Delivery<ul style="list-style-type: none">○ <i>Join Me 5-4 (10 min): Send the Newsletter Email</i>● Email Marketing Best Practices<ul style="list-style-type: none">○ <i>Join Me 5-5 (10 min): Tour All Subscribers</i>○ <i>Join Me 5-6 (10 min): Create a Publication List</i>○ <i>Your Turn 5-7 (20 min): Create the Recent Bounces Exclusion List</i>
30 minutes	Wrap Up

AGENDA

Build and Analyze Customer Journeys Using the Marketing Cloud (MKT101)



30 minutes

Welcome and Review

275 minutes

Marketing Automation

- Automation Studio
 - *Join Me 6-1 (10 min): Create the Abandon Cart Import Activity*
 - *Join Me 6-2 (10 min): Create the Abandon Cart Data Automation*
 - *Join Me 6-3 (20 min): Create Abandon Cart Data Filters and Filter Activities*
 - *Join Me 6-4 (10 min): Add Segmentation Activities to the Abandoned Cart Data Automation*
- Journey Builder
 - *Join Me 6-5 (20 min): Create and Schedule a Single Send Journey*
 - *Your Turn 6-6 (15 min): Create and Automate the Welcome Step 1 Filter Activity*
 - *Join Me 6-7 (10 min): Create the Welcome Series Journey and Configure the Entry Source*
 - *Join Me 6-8 (10 min): Configure Journey Settings and Goal*
 - *Join Me 6-9 (15 min): Configure Messaging and Flow Control Activities to the Welcome Journey*
 - *Join Me 6-10 (5 min): Validate and Activate the Welcome Journey*

30 minutes

Wrap Up

AGENDA

Build and Analyze Customer Journeys Using the Marketing Cloud (MKT101)



30 minutes	Welcome and Review
90 minutes	Marketing Automation <ul style="list-style-type: none">• Journey Testing <i>Join Me 6-11 (45 min): Test the Abandon Cart Campaign with Path Optimizer</i>
120 minutes	Analytics and Troubleshooting <ul style="list-style-type: none">• Tracking <i>Watch Me 7-1 (10 min): Review Tracking Results</i>• Reports <i>Watch Me 7-2 (10 min): Tour Reports</i> <i>Join Me 7-3 (10 min): Create and Deliver a Standard Report</i> <i>Your Turn 7-4 (10 min): Analyze the Account Send Summary</i>
105 minutes	Course Summary <ul style="list-style-type: none">• Capstone <i>Your Turn 8-1: Capstone</i>
30 minutes	Wrap Up



Build and Analyze Customer Journeys Using Marketing Cloud

MKT101

SF-MKT101-64.0v1-EN-SG



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Trailblazer Community

Let's Connect!

The screenshot shows the Trailblazer Community Feed. At the top, there's a navigation bar with links for Today, Learn, Create, Community, and No Company. A search bar is located at the top right. On the left, a sidebar titled "My groups" lists "Trailblazer Community Core", "Release Readiness Trailblazers", and "EQ Quality Trailblazer". The main feed area features several posts: one from "Get the conversation started, tries..." asking "How to activate Flow Builder?", another from "Help is what I typically do..." asking "How to activate Flow Builder?", and a third from "Help is what I typically do..." asking "How to activate Flow Builder?". To the right, there are sections for "Recommended groups" (Admin Trailblazers, Lightning Now!, Melbourne User Group) and "Recommended topics" (nDreamDesigners). A "Follow" button is visible next to a profile picture of a man. On the bottom right, there's a mobile phone icon displaying the "Designer Trailblazers" group. The background features decorative elements like a rainbow, clouds, and a cartoon character.

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Course Goals and Objectives



This course provides the Marketing Cloud Specialist with best practices and efficiencies related to executing, analyzing, and monitoring data-driven customer journeys within the Marketing Cloud.

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

- Describe capabilities across the platform.
- Define fundamental data management and structure terminology.
- Create targeted segments using data segmentation tools.
- Discover Email Design best practices to ensure best end user experience.
- Develop effective, relevant messages using Content Builder.
- Prioritize testing methods and tools to ensure quality control.
- Define subscriber statuses, unsubscribe methods, and preferences.
- Use tools within Marketing Cloud to uphold deliverability standards.
- Design and execute the customer journey using automation tools within Marketing Cloud.
- Analyze marketing campaigns using common KPIs.
- Solve common marketing problems using troubleshooting guidance.

Introductions



Logistics

- Class etiquette and participation
- Breaks



Courseware and Agenda

- Agenda for this class
- Layout of the manual and exercises



Your Fellow Students

- Your name
- Goals for your time in this class



Course Expectations



Participation

The course is what you make of it, so participation is key!

To ensure the best learning experience, you're expected to participate in:

- Discussions
- Individual activities
- Group activities
- Polling
- Homework assignments

Ground Rules

- Remove distractions.
- Raise your hand if you have questions.
- Be patient waiting for a chat response.
- Be prepared to be called on by name.
- If you leave temporarily, let us know in chat.

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Agenda

LESSON 1:

Intro to the
Marketing Cloud

LESSON 2:

Administration Essentials

LESSON 3:

Data Management

LESSON 4:

Email Message Design
and Creation

LESSON 5:

Testing, Delivery,
and Best Practices

LESSON 6:

Marketing Automation

LESSON 7:

Analytics and
Troubleshooting

LESSON 8:

Summary



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Access Your Course Materials



- 1 Go to: salesforce.mimeo.digital/login
- 2 Login to your account. If this is your first Trailhead Academy class, create a new account.
- 3 Click redeem and enter the redeem key provided by the instructor.

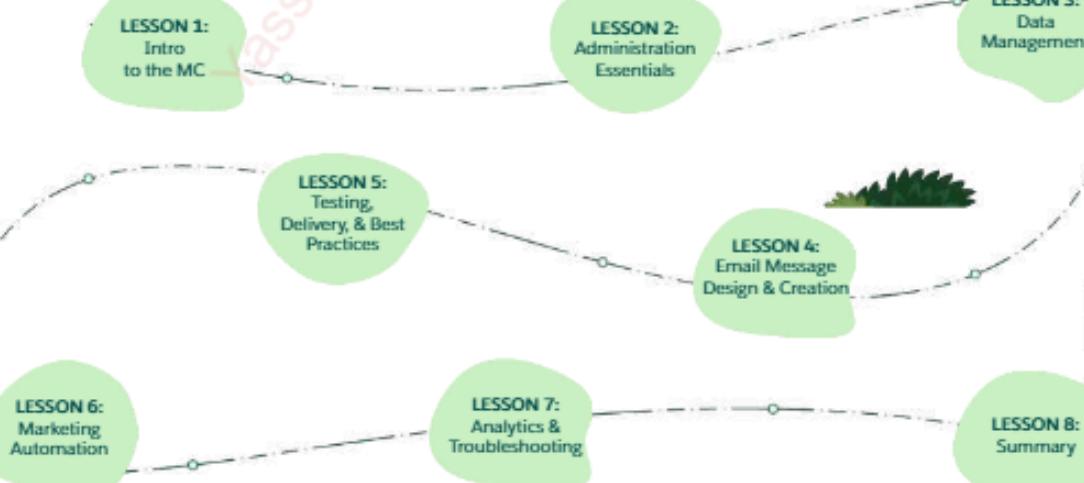
VIRTUAL CLASS NOTE:

If you have any questions or comments during class, please use the chat box to communicate with your instructor.

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Course Roadmap



10



Welcome to NTO



11

Welcome to Northern Trail Outfitters!



Welcome to your new Marketing Specialist career at Northern Trail Outfitters (NTO).

NTO, established in 2004, is a best-in-class retailer, selling apparel, gear, electronics, and nutritional products for outdoor recreation and fitness.

We sell directly to consumers online and through brick-and-mortar stores around the globe. We also work with other businesses as resellers.

Our business is growing, and we need you to help refine and build new marketing campaigns.



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The NTO Team



Ralph
VP of Marketing



Isabelle
Manager of
Digital Marketing



Michele
Technical Marketer



Warren
IT Systems Specialist

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"Welcome to Northern Trail Outfitters!

Here are your Marketing Cloud login credentials. Be sure to let me know if you have any problems logging in."



Isabelle
Manager of
Digital Marketing

14

Join Me



Log Into Marketing Cloud

Goal:

Log into Northern Trail Outfitters' Marketing Cloud Org to get started with your new job!



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Tasks:

Navigate to the Marketing Cloud login page.

Log in with your username and password.

URL: mc.exacttarget.com

Username: **Region_MKT101_###**

Password: **journey@1**

Your instructor will provide you with additional login information.





Lesson 1

Intro to the Marketing Cloud



1

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

Congrats!

LESSON 6:
Marketing
Automation

LESSON 7:
Analytics &
Troubleshooting

LESSON 8:
Summary

2

Lesson Objectives

By the end of this lesson, you will:

- Understand the Customer 360 platform and how Marketing Cloud plays a role in it.
- Understand how Marketing Cloud empowers marketers to connect to their customers.
- Understand the multi-channel capabilities of Marketing Cloud.

3

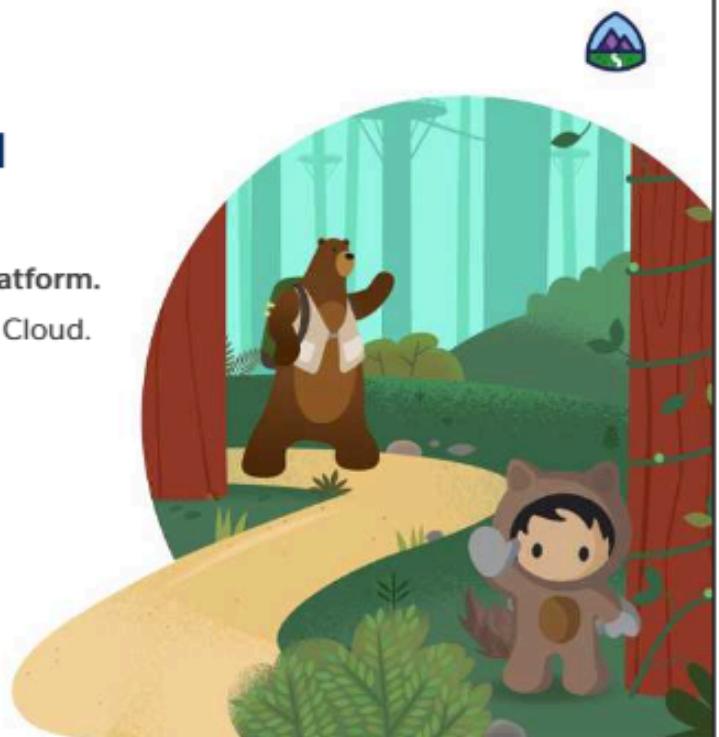


Intro to the Marketing Cloud

Lesson Topics

1. Describe the Salesforce Customer 360 platform.
2. Describe capabilities across the Marketing Cloud.
3. Know where to go for more information, guidance, and support.

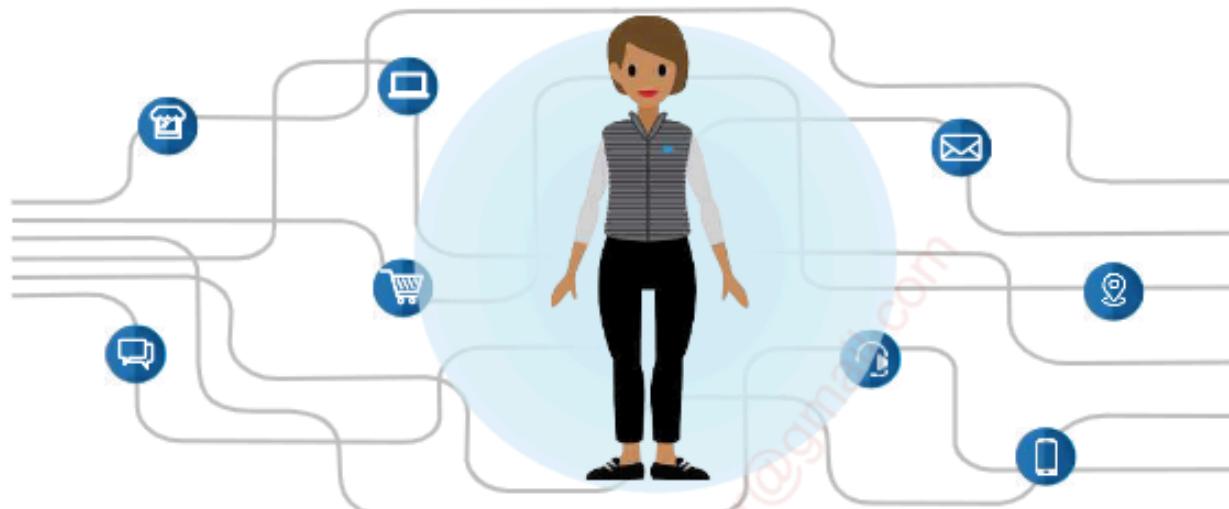
4



Digital Moments: Moving Faster than Ever Before



Experiences must be connected and personalized



5

Connecting to Customers Can Be Challenging



6

Einstein 1



The trusted platform built for AI Enterprise

The diagram illustrates the Einstein Metadata framework. At the top, there are integration points with Tableau, Heroku, Google Workspace, and Microsoft 365. Below these are three main components: Data Cloud (containing a bear icon and 'Real-time data'), CRM apps (listing Sales, Service, Marketing, Commerce, Analytics, and Platform), and Einstein (represented by a cartoon character). The Einstein component includes a 'Trust Layer'. The entire framework is labeled 'Metadata framework' at the bottom. A red diagonal watermark 'Yasser_Akhtar - akhtar.yasser@gmail.com' runs across the slide.

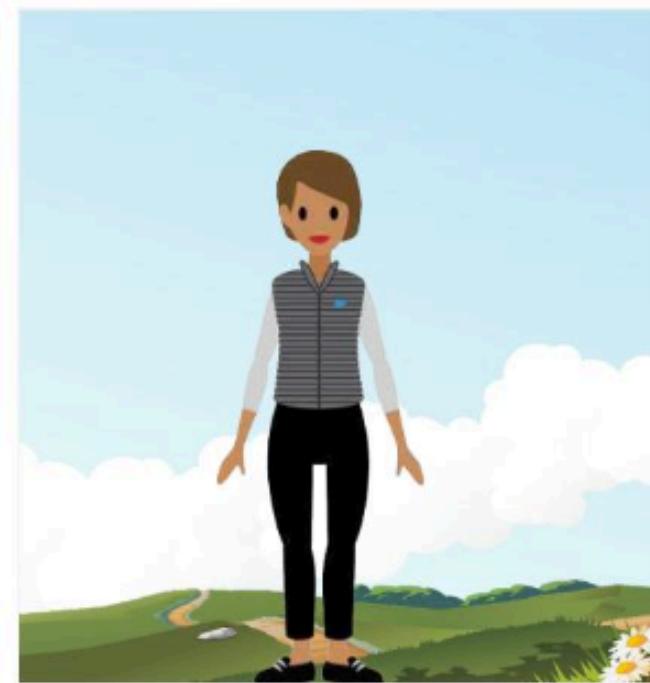
- Integrated
- Intelligent & conversational
- Automated
- Low code & no code
- Open

Intro to the Marketing Cloud



Lesson Topics

1. Describe the Salesforce Customer 360 platform.
2. **Describe capabilities across the Marketing Cloud.**
3. Know where to go for more information, guidance, and support.



MEET **Rachel**

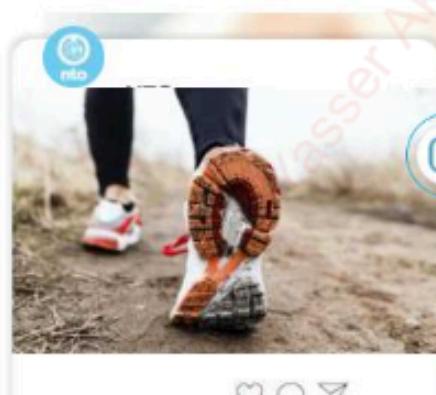
Mid-thirties working professional.
Married with two young kids.

Avid hiker & trail runner. Purchased from Northern Trail Outfitters (NTO) in the past, but it's been over a year.

Running a half marathon in London later this year and looking for new training gear.

9

Rachel's Customer Journey Begins with an Ad



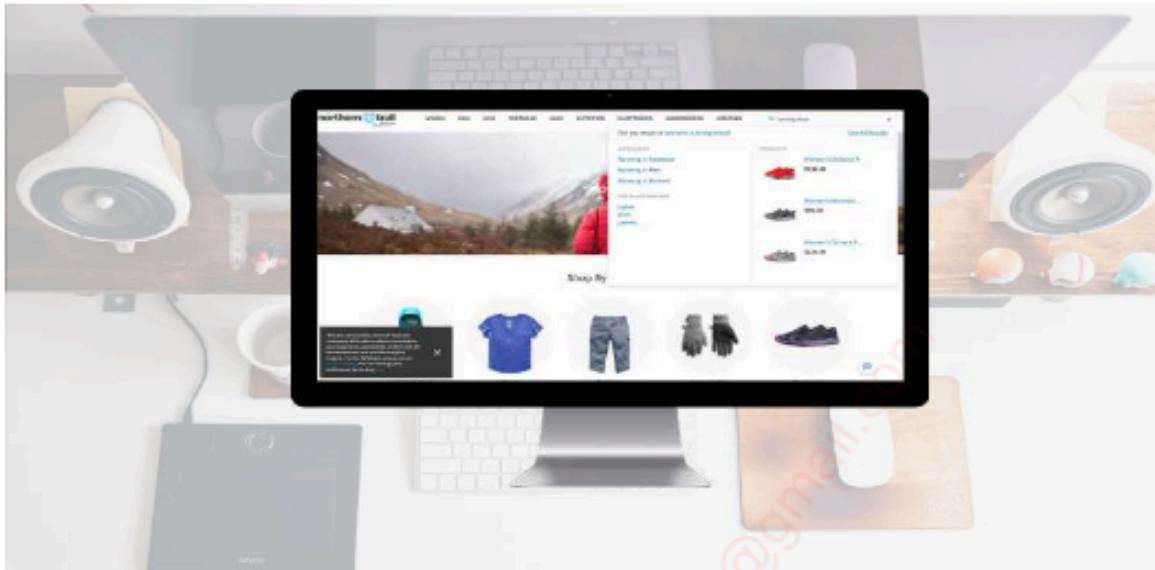
NTO Your next adventure awaits. For a limited time, get 25% off storewide at NTO. Free shipping & free returns. Start exploring: ntroutfit.com

rachel.morris It's like you read my mind!



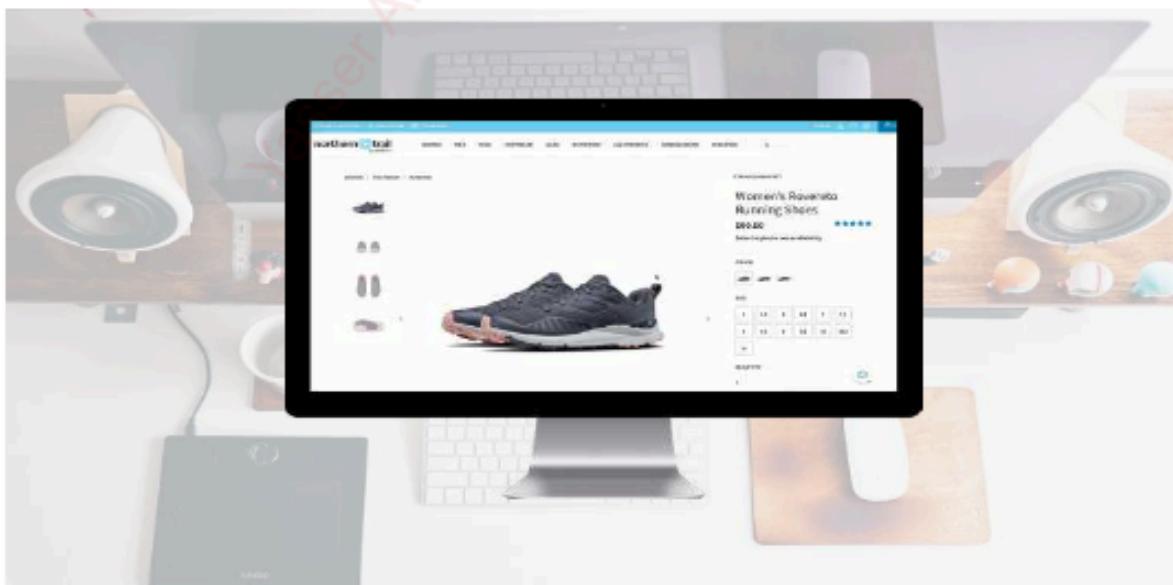
10

Rachel Receives Product Recommendations



11

Rachel Makes a Product Selection



12

Rachel Abandons Her Shopping Cart



A screenshot of the Northern Trail website's shopping cart page. The cart contains one item: 'MICHAEL'S RECHARGEABLE RUNNING SHOES' in size 8.5, priced at \$90.00. The subtotal is \$90.00, tax is \$5.54, and shipping is \$0.00, totaling \$95.54. To the right of the cart, there is a promotional banner for a speaker system.

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Rachel Enters the Abandon Cart Journey



A screenshot of the Northern Trail website's cart abandonment email. The subject line is 'Rachel, Don't forget about us...'. The email body includes a message: 'Something was left behind in your shopping cart, and we wanted to remind you before it's gone... Return to your cart to have another look. The cart even included a special offer to help you with your decision.' Below this is a promotional offer: '10% OFF + FREE SHIPPING' with the code 'GART10'. A blue button says 'Take Me Shopping'. The Northern Trail logo is at the bottom.

A person's hands holding a white coffee cup are visible on the right side of the image.

14

Rachel Completes the Purchase



The screenshot shows the Northern Trail Outfitters website's shopping cart page. The cart contains one item: "MICROFIBER BACKPACKING TENTS" at \$85.00. The subtotal is \$85.00, there is a discount of \$0.00, tax of \$4.86, and shipping of FREE. The total amount is \$89.86. To the right of the cart, there is a form for payment information, including fields for First Name, Email Address, Phone Number, and Payment Method (Credit Card, Debit Card, or Apple Pay). A large red watermark reading "RECOMMENDED FOR YOU" is overlaid across the page.

15

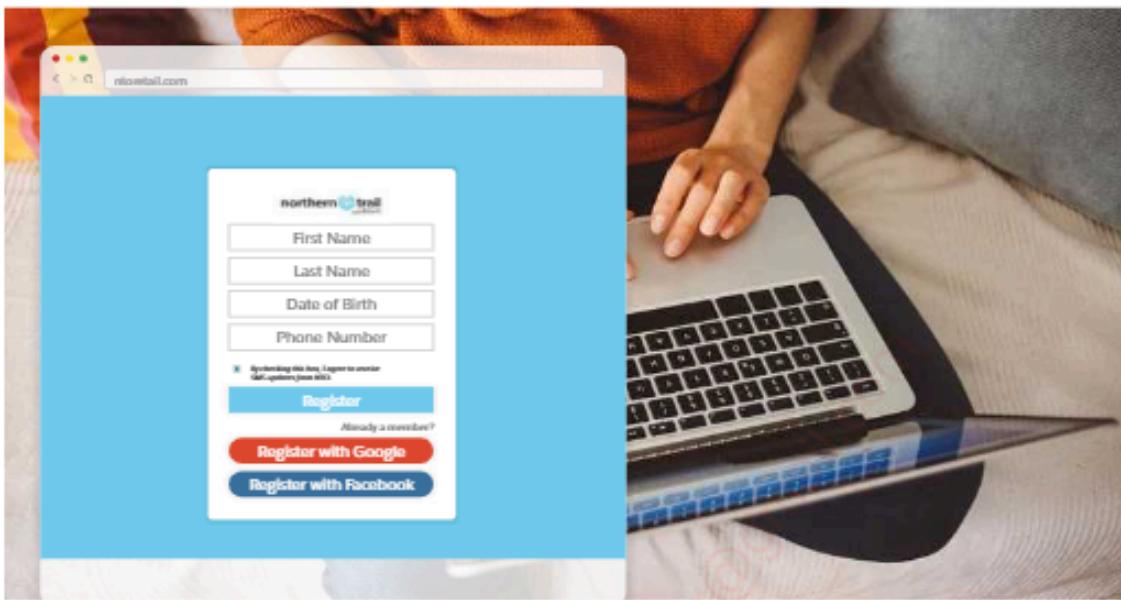
Rachel Receives a Purchase Confirmation Email



The screenshot shows an email inbox with one message from "Northern Trail Outfitters" titled "NTO PURCHASE CONFIRMATION". The email body includes a large "\$85.86" and a greeting "Hello Rachel". It thanks her for shopping with NTO and states that her order has been processed and is on its way. It mentions that a shipping confirmation with tracking number and expected delivery date will be sent. Below this, it provides order details: Order Number: S825779, Purchase Date: 5/17/2017 4:22:45 AM, Payment Method: Apple Pay. At the bottom, it shows the subtotal (\$85.00), tax (\$4.86), shipping (FREE), and total (\$89.86). A "RECOMMENDED FOR YOU" section is visible at the bottom of the email screen. On the left side of the image, there is a vertical decorative background of a dark patterned fabric.

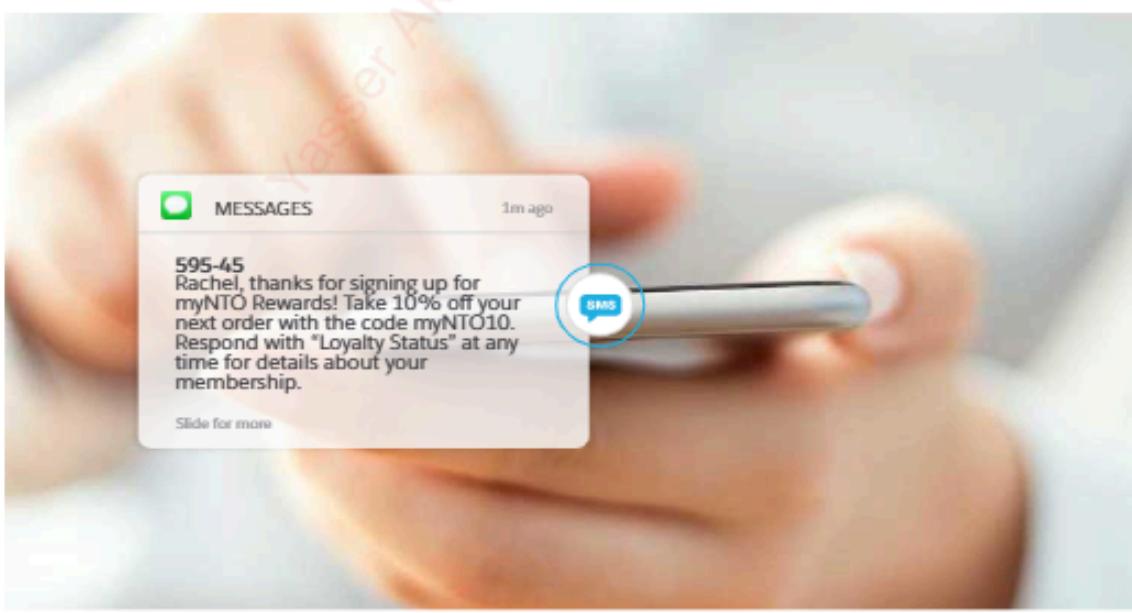
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Rachel Signs Up for the Rewards Program



17

Rachel Opts In for SMS Messaging



18

NTO Engages with Rachel through Social Media



19

Rachel's NTO Customer Journey



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Marketing Cloud Features & Capabilities

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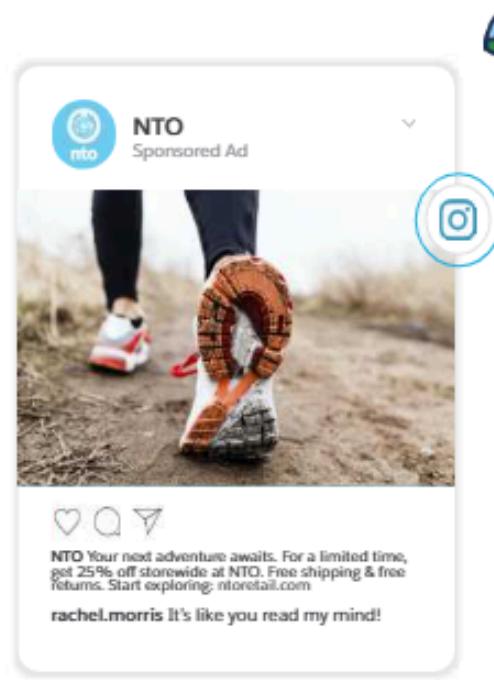
Advertising

Advertising

Marketers can take their CRM/first party data stored in the Marketing Cloud and use it to target their digital advertising campaigns across Facebook, Google, Twitter, YouTube, Google Ads, Pinterest, LinkedIn, Instagram or Snapchat.

- The most common use cases are:
 - Growing subscriber bases by creating lookalikes of existing customers
 - Suppressing existing customers for acquisition campaigns
 - Re-engaging unengaged email subscribers
 - Reaching existing customers with targeted and specific messaging

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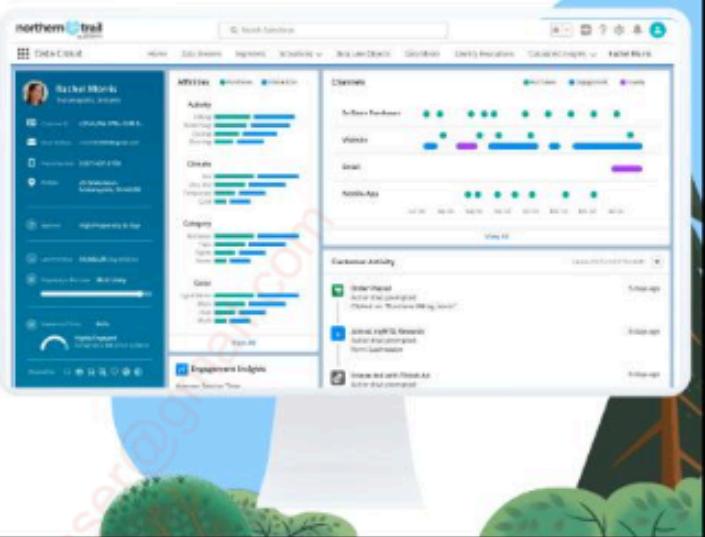
Data Cloud



With Data Cloud, you can:

- Create unified customer profiles across all touchpoints by connecting identities, engagement data, customer orders, loyalty, and marketing journeys.
- Build smarter audience segments using insights and filtering capabilities.
- Activate data from anywhere across your organization.
- Capture and unify data from anywhere with a high-scale data ingestion service.
- Analyze your data using tools like Tableau or Marketing Cloud Intelligence.

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Data Management and Analytics: Analytics Builder, GA360, and Intelligence



Analytics Builder

Enables marketers to gain insights into the behaviors and interests of customers across channels.

Google Analytics 360

Track and analyze journey activity through your Google Analytics account without assistance from technical support or services.



Intelligence

Marketers use to bring data together and optimize marketing investment and activity.

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Data Management and Analytics: Marketing Cloud Einstein



Einstein Recommendations

- Email Recommendations
- Web Recommendations

Einstein for Journeys & Automation

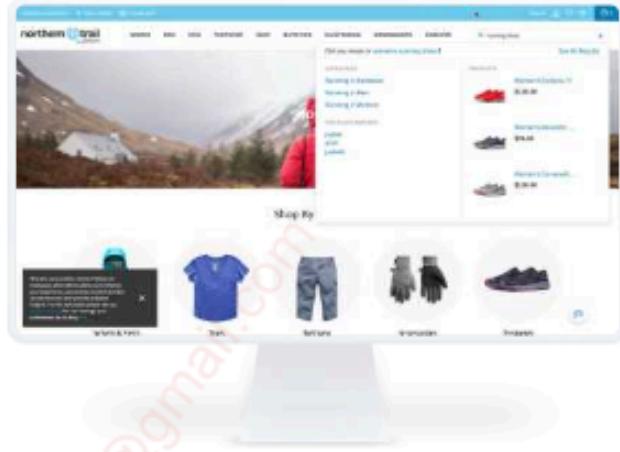
- Einstein Engagement Scoring & Frequency
- Einstein Send Time Optimization

Einstein for Content

- Einstein Content Selection & Testing
- Einstein Copy Insights

Einstein Insights

- Einstein Messaging Insights
- Einstein Engagement Frequency



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Contact Data



Contact Builder

Provides access to contact data contained within your account and the relationships designed to help you use that data.

Use to manage, consolidate, organize, and link data from all Marketing Cloud apps and external sources.



Content Creation

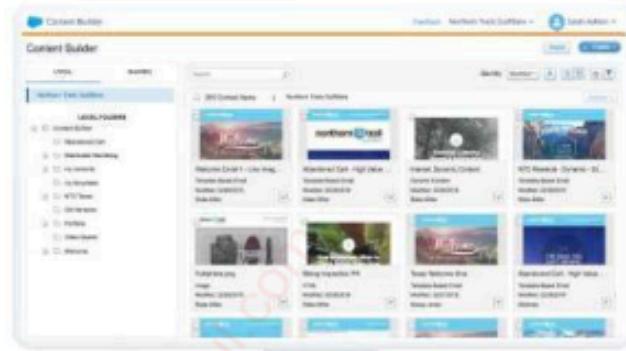


Content Builder

Our cross-channel content management tool that allows you to consolidate images, documents, and content in a single location for use in the Marketing Cloud.

CloudPages

Use to publish targeted marketing content to customers across multiple channels.



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Salesforce CMS

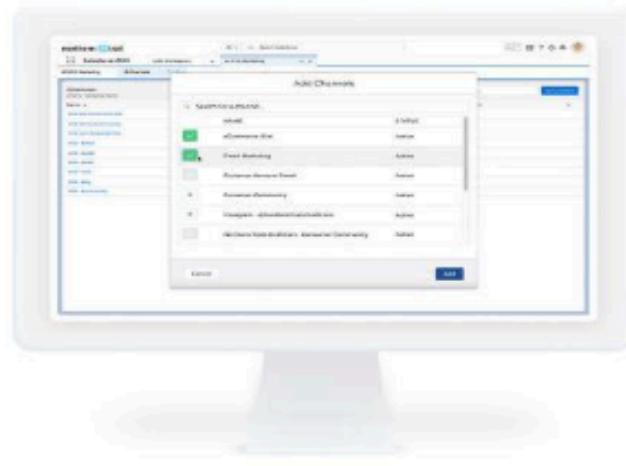


- Salesforce CMS is the connective tissue between content experiences across marketing, commerce, service and more.
- Easy-to-use tools and pre-defined builders.
- Mobile responsive, drag and drop builders, easy version management.
- Scale content to any channel with a hybrid CMS for faster time to market.



NOTE:

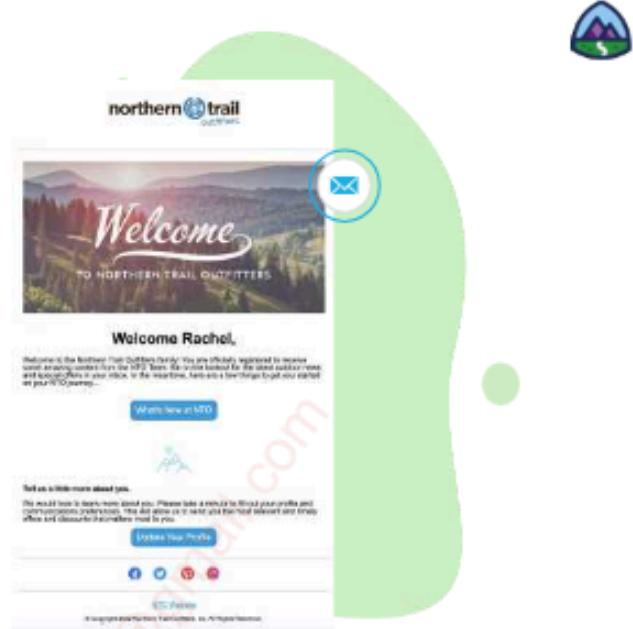
This is a newer feature and will require an additional license.



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Email Studio

- Helps marketers personalize messages to drive 1:1 engagement with customers at scale.
- With Email Studio, marketers segment, build, send, and track both promotional and transactional messages all in one place.



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Mobile Studio

- The Salesforce Marketing Cloud mobile marketing solution that drives immediate and relevant customer engagement.
- Marketers can manage engagement across every customer interaction by personalizing their email, advertising, push, and SMS messaging from a single platform.



30

Journeys and Automation

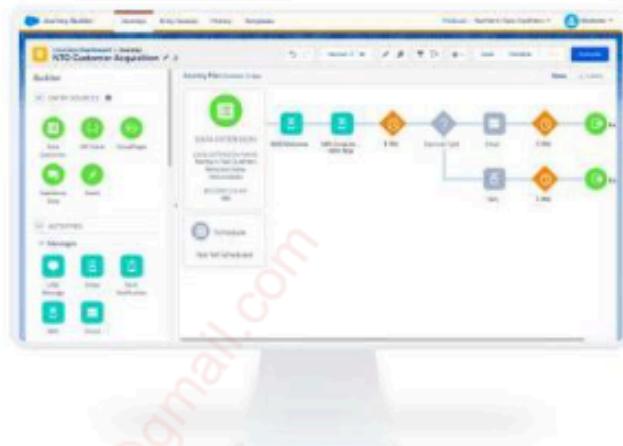


Journey Builder

- A campaign planning tool that enables you to design and automate campaigns that guide customers through their journey with a brand.

Automation Studio

- A Marketing Cloud application used to execute multi-step marketing and data management activities on an immediate, triggered, or scheduled basis.



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Personalization



Personalization

Visualize, track, and manage customer experiences with real-time interaction management. Use the customer experiences to drive valuable engagement at the right moment and just the way your audience prefers.



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Cross-Cloud Products

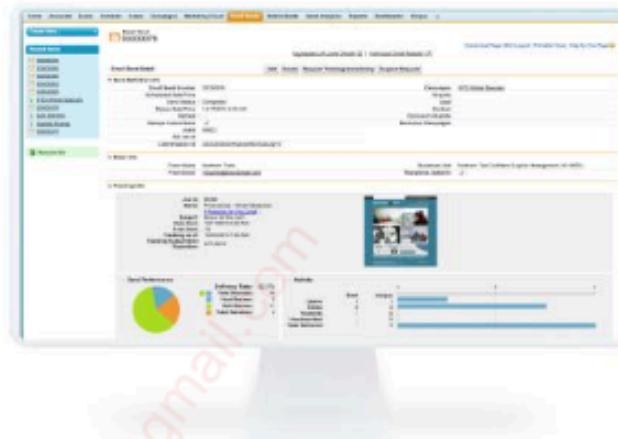


Distributed Marketing

Bridges the gap between corporate marketing, employees, channel partners, and your brand to deliver consistent experiences across corporate marketing and partner networks.

Marketing Cloud Connect

Combines the digital marketing capabilities of Marketing Cloud with the data management, segmentation, and campaign management tools in Salesforce. Create unitary customer relationships with more data-driven, personalized conversations and the ability to automate the customer journey.



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Watch Me



1-1: Tour the Marketing Cloud

Goal:

Familiarize yourself with the Marketing Cloud user interface and navigation.



Instructions:

1. Tour the Marketing Cloud Dashboard.
2. Find your MID (Member ID).
3. Tour the App Switcher.
4. Tour Studios and Builders.

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Intro to the Marketing Cloud

Lesson Topics

1. Describe the Salesforce Customer 360 platform.
2. Describe capabilities across the Marketing Cloud.
3. Know where to go for more information, guidance, and support.

35



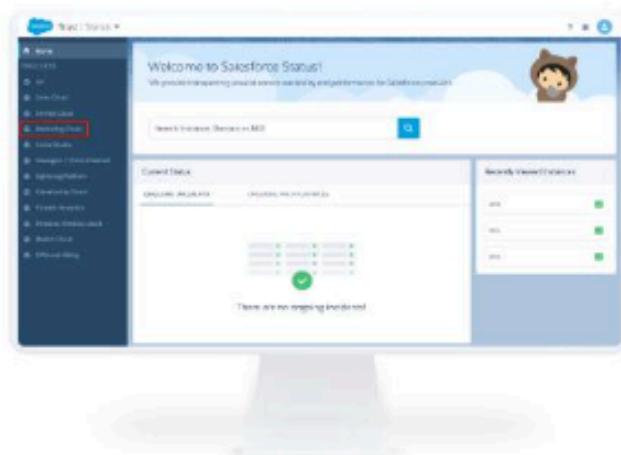
Marketing Cloud Trust Site



Use the Status site to check performance and security of your Marketing Cloud instance.

The Salesforce Trust site is made up of three sections.

- **System Status** provides a visual representation of the health of an instance.
- **Security** gives an overview of Salesforce security practices.
- **Compliance** shows the standards that Salesforce is in compliance with.



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Join Me



1-2: Marketing Cloud Trust Site

Goal:

Use the Marketing Cloud Trust Site to check system status.

Instructions:

1. Navigate to the Marketing Cloud Trust Site.
2. Search and review status.

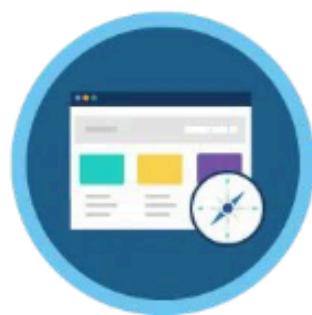


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Salesforce Help



- Find documentation, videos, and walkthroughs to help you succeed.
- Contact Support by submitting a case.
- Connect to the Trailblazer community and get answers from passionate experts.
- Collaborate with other users in Chatter.
- Explore events near you.



#support

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Skill Up and Get Certified

39



Skill Up for the Future with Trailhead



Learn in-demand skills

Business, tech & soft skills
On-demand & in classroom



Connect to opportunity

Mentorship to employment
Trailblazer Community



Earn resume-worthy credentials

700+ badges
42 credentials



40

Get Started with Trailhead

- 1 Sign-up for Trailhead -
<https://trailhead.salesforce.com>

If you already have an account, please log in with that.

- 2 Click 'Sign Up' in the upper right corner.

[Sign Up](#) [Login](#)

- 3 Choose your preferred sign up method and follow the prompts.



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Learn In-demand Skills

Skill Up for the Fourth Industrial Revolution

- Learn digital and soft skills you need to succeed anywhere.

Learn On-demand

- Learn online at your own pace.

Learn with Expert-led Courses

- Learn from our experts in live classes and workshops.



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Earn Resume-Worthy Credentials

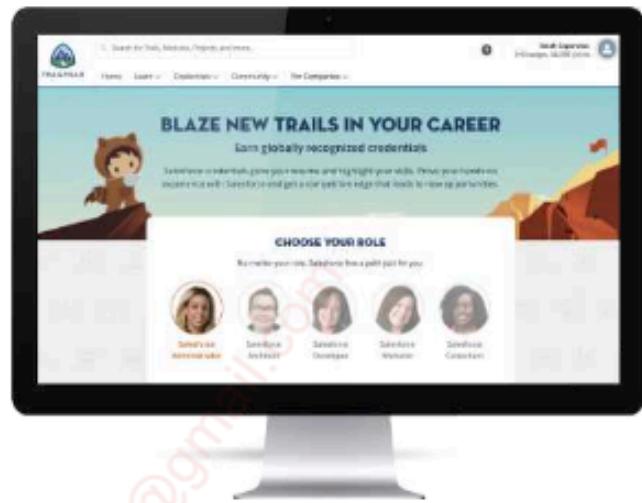


Skill-based Badges

- 700+ badges

Role-based Credentials

- Certifications - globally recognized credentials
- Superbadges - capstone projects that put your skills to the test



43

Marketing Cloud Credentials



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Connect to the Global Trailblazer Community



1300+

Global
Community Groups

87

Countries



CLICK PATH: Go to trailblazercommunitygroups.com | Search your city | Look for Salesforce Marketer Group

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Lesson Review



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Lesson Review



Question 1:

Northern Trail Outfitters wants to send a targeted and personalized email message to customers.

What tool should they use?

A: Intelligence

B: Personalization

C: Mobile Connect

D: Email Studio

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Lesson Review



Question 2:

Where can you go to find documentation and contact support?

A: Salesforce Help

B: Salesforce Training

C: Salesforce Certification

D: Salesforce Support Portal

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Lesson Review



Question 3:

Northern Trail Outfitters wants to create a lookalike audience for a targeted Instagram Ad. What tool should they use?

50

A: Intelligence

B: Advertising

C: Personalization

D: Journey Builder

Lesson Review



Question 4:

A marketer needs an analytics tool to determine ROI on marketing campaigns. What tool should they consider?

51

A: Contact Builder

B: Content Builder

C: Intelligence

D: Journey Builder

Lesson 1: Hit the Trails!



Trail:

[Get to Know Marketing Cloud](#)

Modules:

[Marketing Cloud Basics](#)

[Marketing Cloud Products](#)

[Marketing Cloud Trust Site](#)



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Introduction to the Marketing Cloud: Helpful Resource Links



Trailblazer Community Groups

<http://trailblazercommunitygroups.com/>

Marketing Cloud Success Community

<https://trailhead.salesforce.com/trailblazer-community/groups/0F9300000001pQ5>

Supported Browsers

https://help.salesforce.com/articleView?id=mc_overview_graded_browser_support.htm&type=5

All Marketing Cloud Trails

<https://sfdc.co/mctrails>

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Next
Lesson





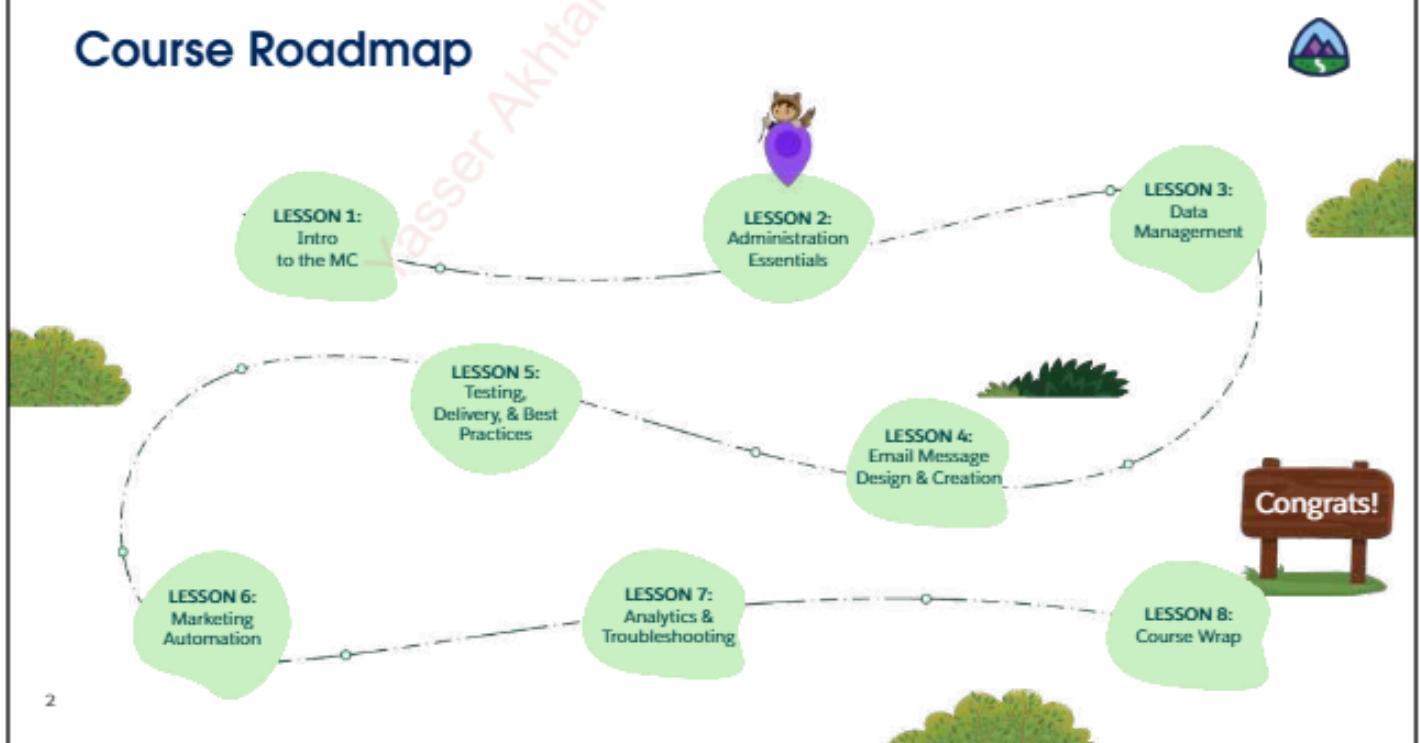
Lesson 2

Administration Essentials



1

Course Roadmap



Lesson Objectives

By the end of this lesson, you will:

- Learn more about how your account is setup and what permissions are necessary to complete different campaign tasks.
- Describe the basic setup needed to start sending email messages.

3

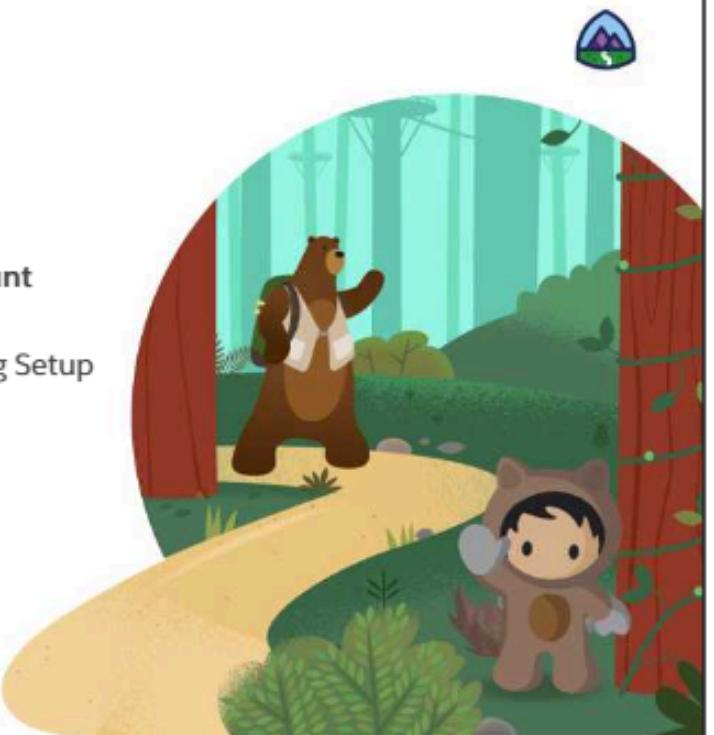


Administration Essentials

Lesson Topics

1. Explain Administration Essentials > Account Setup
2. Explain Administration Essentials > Sending Setup

4



Administration Essentials: Account Setup



"We're so glad to have you on the team. I want to go over how our account is set up to get you started. I'm the account admin, so I can help you with questions about setup!"



Warren
IT Systems
Specialist

5

Marketing Cloud Setup



Marketing Cloud Setup provides a centralized location to view and manage details about your Marketing Cloud account. Setup also contains links to other helpful sources of information about Marketing Cloud.

Account Setup options include:

- Business Unit Setup
- Roles and Permissions
- User Setup

6



Tenant



Definition

A tenant is your top-level Enterprise account and its business units, your Core account, your top-level Agency account, or your Client account, depending on your tenant type.

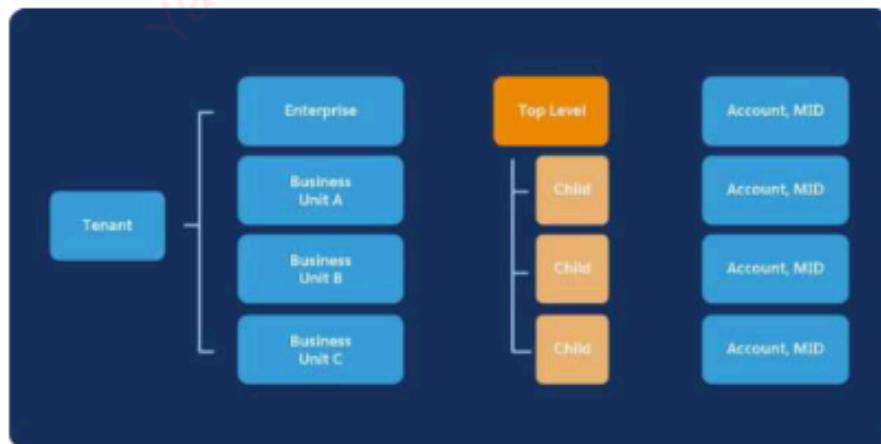


7

Marketing Cloud Tenants



Marketing Cloud has a variety of tenant types, with Enterprise 2.0 as the most common tenant. It consists of a top-level account and all associated business units.



8

Business Units



Definition

Business Units enable logical separation of business segments within the Marketing Cloud and control access to the information contained in them.



9

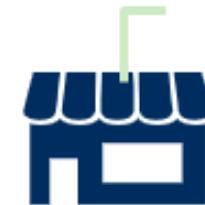
Enterprise 2.0 Business Units



- Hierarchical Structure
- Sharing capabilities
- Allow for Brand Control
 - **Distributed Messaging**
 - Multi-Branded Companies



NTO Corporate
Marketing



Denver, CO Store



Burlington, VT
Store

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Enterprise 2.0 Business Units

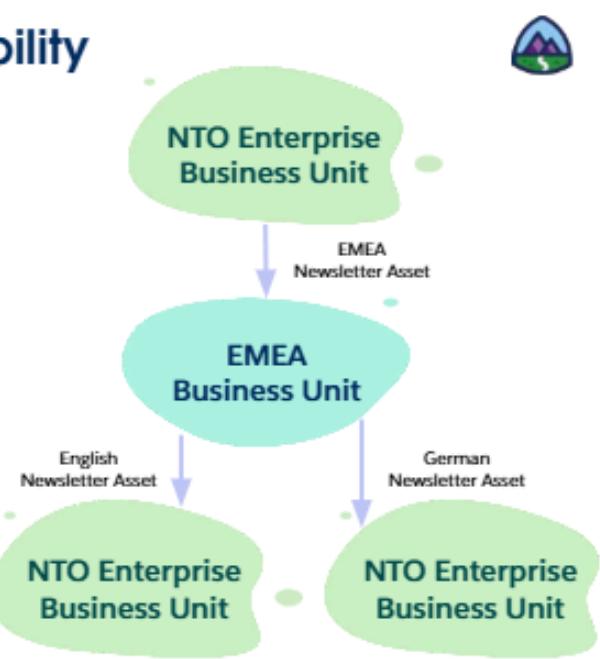
- Hierarchical Structure
- Sharing capabilities
- Allow for Brand Control
 - Distributed Messaging
 - Multi-Branded Companies



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Enterprise 2.0: Sharing and Visibility

- Contains shareable objects: Content, Templates, Emails, Data Extensions, Publication Lists, Suppression Lists, Journey Templates.
- Users working in a business unit can access all items created in that business unit if given a particular role to allow access.
- Share items with users in other business units by placing the items in a shared items folders.
- Content Builder allows users to share individual assets in addition to folder sharing.
- Journey Builder allows user to share templates.



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Roles and Permissions



- Marketing Cloud uses system-defined roles to manage user permissions by Default.
- In addition to assigning roles to users, roles can be assigned to Business Units.
 - When a role is assigned to a Business Unit, all users in that Business Unit have the same permissions.
- Users can have a different role in every Business Unit they are assigned to, or they can have one role that applies to every Business Unit they're assigned to.

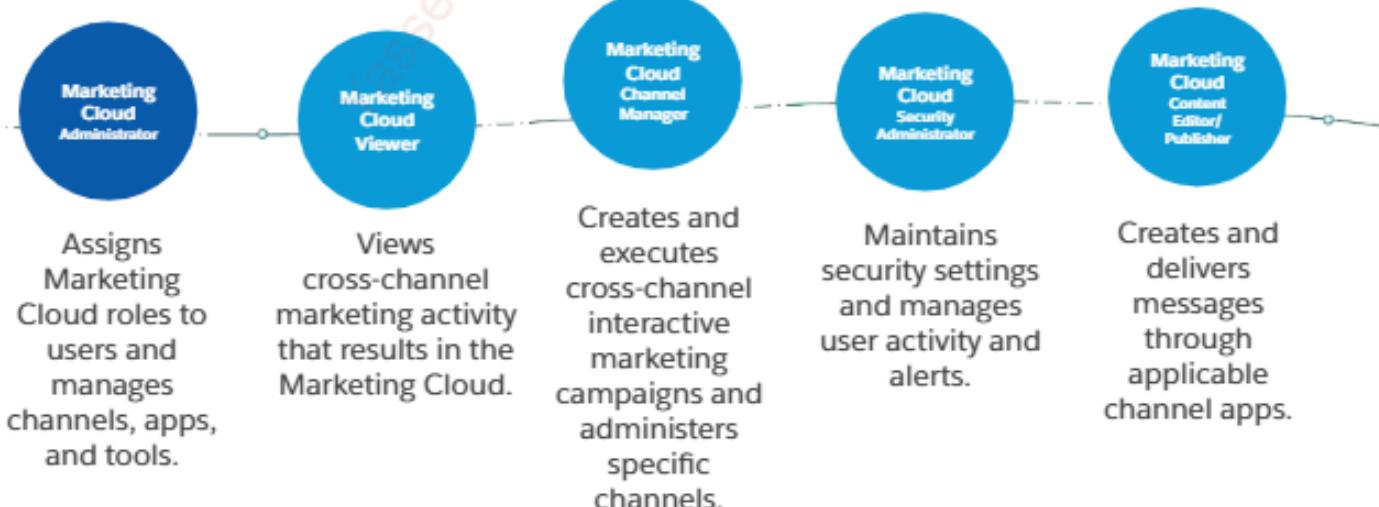


Definition

A role in Marketing Cloud is a collection of permissions.

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Standard Marketing Cloud Roles



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Conflicting Permission Access

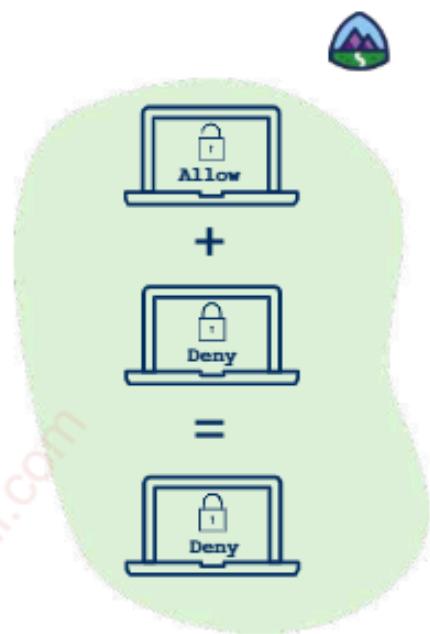
- The most restrictive security settings always apply.
 - For example, a user with Allow on the Send permission for Email Messages is assigned a Custom Role with Deny on the Send permission for Email Messages. This user will not be able to send an Email Message.
- This helps ensure that users have access to the features they need to use, mitigate risk, and protect the Org.
- As a best practice, provide users with the minimum access necessary to do their jobs



NOTE:

Combining standard roles with custom roles may not result in the appropriate level of access for a user if there is a conflicting permission.

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Users

Definition

Users are people with login settings to your Marketing Cloud organization. They are assigned usernames, passwords, Business Units, and Roles.



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Understanding Users



Creating a User grants access to the Marketing Cloud.

- To help protect assets in your account and prevent unauthorized access:
 - Create one user per person, API process, and third-party system that you integrate with.
 - Do not allow users to share usernames and passwords because it increases the likelihood of a compromised account.
 - Give each user the least possible access to accomplish their jobs in each applications.
 - Understand that users cannot be deleted – only disabled.



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Creating New Users Workflow



Create user
• For new users only



Assign user to business unit(s)
• For new users only



Assign roles to user
• If logged in, refresh for changes to take effect



Email user credentials
• For new users only

NOTE:

Marketing Cloud does not automatically notify a new user that their account has been created.

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Join Me



2-1: Tour User Preferences

Goal:

Explore User settings and management.



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Instructions:

1. Tour Cloud Preferences.
2. Tour User Administration.
3. Change the Account Time Zone.

Administration Essentials

Lesson Topics

1. Explain Administration Essentials > Account Setup
2. Explain Administration Essentials > Sending Setup



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