

Determining Dates: Birthday



You want to send a birthday email 7 days before the subscriber's birthday.

What is your data filter expression?

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Determining Dates: Birthday Solution



SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Birthdate is **anniversary of Today plus 7 days**.

The **Anniversary Of** operator finds the Month and Day but ignores the year of the date.

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Determining Dates: Opt In



You want to send a welcome email to everyone three days after they opt in.

What is your data filter expression?

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Determining Dates: Opt In Solution



SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	X	11	12	13	14
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

OptinDate is
Today minus 3 days

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Join Me



3-7: Create the LowValueCart Segment

Goal:

Create a Filtered Data Extension to find all subscribers who have a cart total of less than \$300.



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Instructions:

1. Navigate to Data Extensions in Email Studio to the NTOAbandonCart Data Extension.
2. Create the Filtered Data Extension criteria using the provided table and Save & Build.
3. Create the Filtered Data Extension using the provided table and Save & Build.
4. Verify the record count.

Your Turn



3-8: Create the HighValueCart Segment

Goal:

Create a Filtered Data Extension to find all subscribers who have a cart total of greater than \$300.



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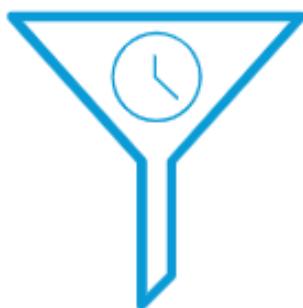
Instructions:

1. Create the HighValueCart Data Extension.
2. Create the Filtered Data Extension using the provided table.
3. Verify the record count.



Refreshing Segments

A Filtered Data Extension
is a snapshot in time.



When you add or update data
in a standard data extension,
your Filtered Data Extension
needs to be Refreshed.

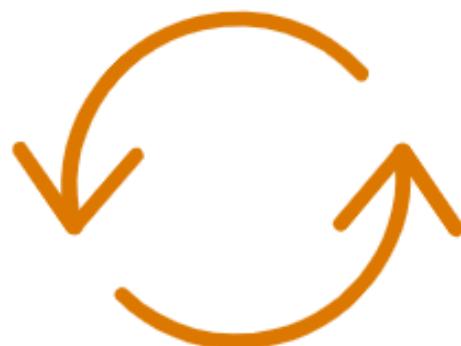


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Manually Refresh Segments

- You can manually refresh a filtered segment by clicking the Refresh icon in the user interface.
- Clicking refresh will re-run the rules that were used to create the data extension.
- Any Subscribers who now meet your criteria will be placed in the data extension.
- Any Subscribers who no longer meet your criteria will be removed.



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Watch Me



3-9: Refresh the LowCartValue Data Extension

Goal:

Manually refresh the LowCartValue Data Extension.



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Instructions:

1. Navigate to Data Extensions in Email Studio.
2. Manually refresh the LowCartValue Data Extension.

Segmentation: SQL Queries



"I used Excel to create that import file earlier, but Michele just mentioned that we could have used a query. Here's the SQL statement so we can do it all in the Marketing Cloud."

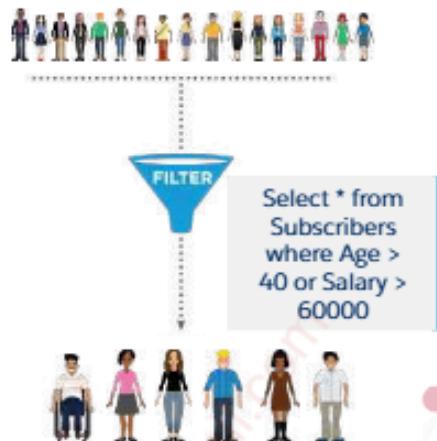


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SQL Query Activity



- A query is an activity that retrieves data extension or data view information matching your criteria, then includes that information in a data extension.
- You use SQL to create the query you use in the query activity.
- A query activity executes your SQL statements for up to 30 minutes. Query activities exceeding this limit display an error status and do not output results.



Tip:

Create the results data extension prior to creating the SQL Query Activity.

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When to Use a SQL Query Activity



Use a SQL Query Activity when you have a need for complex segmentation such as:

- Requirement to join multiple data extensions together.
- Requirement to join data extension data with data from system tables, such as Opens, Clicks, or Subscriber Status.
 - Ex: Only sending to the subscribers who have opened an email in the last 60 days.
 - Ex: Excluding subscribers who have had a bounce event in the last 30 days.
- Requirement to have large amounts of data that needs to be staged for sends or Journey Builder activities.

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Data View Tables



- Tables that contain subscriber and journey information.
- Data Views contain six months of data.
- Can only be accessed through the Query Activity – they are not visible in the user interface.
- Click and open tracking data displays in Central Standard Time, does not observe Daylight Savings Time, and is rounded to the nearest second.
- Each Data View has its own set of attributes available to use in an SQL Query Activity.



RESOURCE:

Search Salesforce Help for
“System Data View Tables.”



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Tips for Using SQL in Marketing Cloud



- Statements must start with SELECT.
- In a query activity that queries data extensions, use the primary key attribute in your select statement, or in any join as a predicate.
- If this query activity is part of an automation, do not add other activities on the same step of the automation. Remove other activities that occur on this step.
- When you write a query, specify specific attributes by spelling them out within the select clause instead of using the Select * option.
- Define attributes based on the maximum size of data to be stored in them.



RESOURCE:

Search Salesforce Help for
“SQL Query Activity..”



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Joining Data Extensions



A JOIN is a SQL clause used to combine rows from two or more data extensions. The data extensions must have a related attribute.

```
SELECT column_name(s)
FROM table1
INNER JOIN table2
ON table1.column_name=table2.
column_name
```

The diagram illustrates the concept of a JOIN using two overlapping circles labeled 'Table 1' and 'Table 2'. The intersection area where the two circles overlap contains the data from both tables, while the non-overlapping areas represent data unique to each table.

Table 1			Table 2		
Name	MyNTO	NTOv	Customer Number	Last Item # Viewed	Purchased
Smith	Gold	325	563218	10556854	Yes
Calahan	Platinum	1050	123985	10569832	No
Luca	Platinum	1120	382514	10499843	In Cart
VanO	Silver	10	966574	28946565	Yes
wartz	Gold	500	646678	10458693	Yes
	Gold	487		10569832	No

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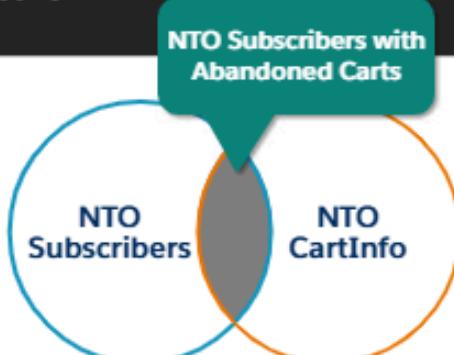
NTO Abandon Cart SQL Query Statement



```
1  SELECTnto.SubscriberKey as CustomerID, nto.EmailAddress,
2  nto.FirstName, nto.LastName, nto.Interest, nto.Gender,
3  cart.IsAbandon, cart.CartTotal, cart.AbandonDate
4  FROM      NTOSubscribers nto
5  INNER JOIN  NTOCartInfo cart
6  ON          nto.SubscriberKey = cart.CustomerID
7  WHERE        cart.IsAbandon = 'True'
```

INNER JOIN NTOCartInfo cart
ON nto.SubscriberKey = cart.CustomerID

Joins two tables together on a common attribute.
Only returns records if the Query returns values from both tables.



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NTO Abandon Cart SQL Query JOIN



NTOSubscribers

- EmailAddress
- SubscriberKey
- FirstName
- LastName
- OptInDate
- Interest
- MyNTOLevel
- MyNTOBalance
- Gender
- Birthday

NTOCartInfo

- CustomerID
- AbandonDate
- SKU
- Cart_Total
- IsAbandon



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NTOAbandonCart Results Data Extension



SubscriberKey	EmailAddress	FirstName	LastName	Gender	Birthdate
1000000203	trammell.10000.0203@yahoo.marketingclouddemo.com	Rosanna	Trammell	F	4/27/61 0:00
1000000204	chulverson.10000.0204@yahoo.marketingclouddemo.com	Cordell	Hulverson	M	7/11/78 0:00
1000000205	mhamens.10000.0205@yahoo.marketingclouddemo.com	Maryellen	Hamens	F	12/25/30 0:00

CartID	CustomerID	AbandonDate	CartTotal
1878437	1000000203	4/29/19 10:21	133.81
1878237	1000000204	4/29/19 12:15	180.63
1878037	1000000205	4/29/19 6:02	501.67

NTOSubscribers Data Extension

NTOCartInfo Data Extension



NTOAbandonCart Data Extension

CustomerID	EmailAddress	FirstName	LastName	CartTotal
1000000203	trammell.10000.0203@yahoo.marketingclouddemo.com	Rosanna	Trammell	133.81
1000000204	chulverson.10000.0204@yahoo.marketingclouddemo.com	Cordell	Hulverson	180.63
1000000205	mhamens.10000.0205@yahoo.marketingclouddemo.com	Maryellen	Hamens	501.67

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Join Me



3-10: Create the NTO Abandon Cart Query Activity

Goal:

Create a Query Activity using SQL to find all subscribers with abandoned carts.



Instructions:

1. Navigate to Automation Studio.
2. Create the Query Activity.
3. Run the Abandon Cart Query Activity.
4. Navigate to NTOAbandonCart data extension and verify record count.

Filters vs. Query



Filters	Query
A Single Data Extension	Single or Multiple Data Extensions
"All" attributes in source data extension are in filtered data extension	Supports joins, unions, nested queries, counts, sums, and more Results data extension can contain attributes from the DEs being queried Knowledge of SQL
UI automatically creates a filtered data extension	Results data extension must be created first

Query Studio



Write Queries Without Creating a Data Extension Using Query Studio.

- You no longer have to create a data extension to write and run queries in Marketing Cloud.
- Instead, you can use Query Studio to develop queries.
- To find rows that can't be inserted due to mismatched data types, incorrect lengths, or missing attributes, you can validate your query against a target data extension.
- Ask your Marketing Cloud administrator to install the app for free from Salesforce Labs on the AppExchange.



RESOURCE:
Access [Query Studio](#) from the AppExchange.

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Lesson Review

Yasser Akhtar - akhtar.yasser@gmail.com



Lesson Review



Question 1:

NTO stores data in a data extension that contains all of their subscribers and other information. NTO identifies their subscribers using a unique attribute called Customer ID.

How should NTO ensure duplicate Customer IDs are NOT created?

A: Use Customer ID in the Send Relationship

B: Utilize a list-based data model instead

C: Merge duplicate subscriber records

D: Set Customer ID as a Primary Key

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Lesson Review



Question 2:

When creating a Sendable Data Extension, what two things are required during creation?

A: Have a field named Subscriber Key and define the Send Relationship

B: Mark "Is Sendable"

C: Define the Send Relationship

D: Define the Send Relationship and have at least one field marked as Primary Key

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Lesson Review



Question 3:

A marketer for NTO needs to update records in a data extension without overwriting existing data.

What is required for the data to be updated only?

A: Subscriber Key

B: Primary Key

C: Send Relationship

D: Multiple Primary Keys

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Lesson 3: Hit the Trails!



Trail:

[Marketing Cloud Contact Management](#)

Modules:

[Audience Segmentation](#)

[Marketing Cloud Data Management](#)



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Data Management: Helpful Resource Links



Contact Builder in Marketing Cloud

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

Data Views

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

SQL Reference

https://help.salesforce.com/articleView?id=mc_as_sql_reference.htm





Lesson 4

Email Message Design and Creation



1

Course Roadmap

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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:
Course Wrap

Lesson Objectives

By the end of this lesson, you will:

- Learn more about tried and true best practices for designing emails
- Understand how to use Content Builder to build personalized and relevant messages best practices in mind.

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Email Message Design and Creation

Lesson Topics

1. Discover Email Design best practices to ensure best end user experience.
2. Develop effective, relevant messages using Content Builder.

4



NTO's Abandon Cart Campaign



Email 1 Low Value Cart
Abandon = True
CartTotal less than \$300



Email 1 High Value Cart
Abandon = True
CartTotal greater than \$300

Wait



No Opens Follow Up
Did they open the
email?

5

Email Message Design: Best Practices

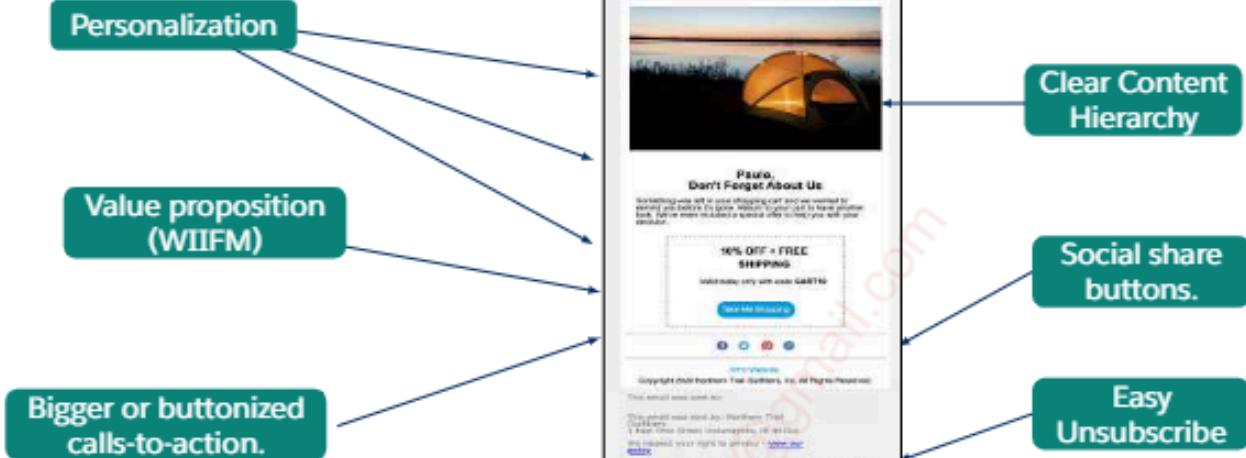


"Here is the design for the Abandon Cart email that we worked on together. Please review, and let me know if you have any feedback."



6

Anatomy of a Great Email



7

Email Design Best Practices



Make it easy to unsubscribe.
Always test your emails.

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)

Make it personal.
Optimize for mobile.

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.

8

Subject Lines and Preheaders



Subject Lines

- Keep them short (50 characters or less) and to the point.
- Use your branding to your advantage.
- Test, test, and test again!

Preheaders

- This is the text that follows the subject line in an email preview.
- Use Preheaders to increase open rates.

From: NTO

Subject Line: Don't forget about us!

Preheader: You left something in your cart.

From: NTO

Subject Line: Paolo, Welcome to Northern Trail Outfitters!

Preheader: Save 10% Today



Einstein Copy
Insights can help
optimize subject
lines through
machine learning.

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Great Subject Lines



Subject Line	Why It Works
Hold your breath until you see this	This subject line for an air freshener product builds intrigue and relates to the product being promoted.
Dads: This email is not for you. Forward to your family.	A forwarding request makes you want to read the email. So does being told it's not for you.
Express shipping: on Dasher, on Dancer, on Procrastinator	Addressing someone or identifying with someone makes them feel understood and like they are being spoken to on a personal level. In this example, we're addressing that sometimes "we" procrastinate when it comes to holiday shopping.

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Not so Great Subject Lines



Subject Line	Why It Fails
%%Day of Week%% Newsletter	This says nothing except which day of the week it is.
RE: Previous email	This is misleading. Putting a RE: message in the subject line could cause subscribers to be annoyed and unsubscribe or report you as spam.
[Blank]: Check out this deal.	Make sure you have a default value such as "Valued Customer" in place of a first name, for example, to avoid having a blank in the subject line.

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Inbox Display



Definition

How the email looks like in a subscriber's inbox before it's opened.

Includes the following:

- Email envelope (From Name and Address)
- Subject Line and Preheader

Best practices for good Inbox Display:

- Recognizable Sender Name
- Personalization
- Good Call-to-Action



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Calls to Action (CTA)



What do you want the subscriber to do as a result of your email?

This is your call to action.



Here are some best practices for CTAs:

- **Urgent:** Use CTAs that create a need for urgent action.
- **Brief:** State the CTA briefly, with no more than five words.
- **Action-oriented:** Begin your CTA with a verb (download, register, buy, save).
- **Clear and predictable:** Be clear and link to a place that doesn't surprise subscribers.
- **Limited and visible:** Focus subscribers' attention on one to two prominent CTAs.

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Designing for Mobile



Make your emails responsive:

- Cut your content
 - Keep content brief and organized in a content hierarchy.
- Set image properties
 - Limit large images by specifying height and width.
 - Use @media query CSS to tailor design to devices.
- Mind the fold
 - Keep CTA and important messages above the fold.
- Focus on mobile
 - Use large text, optimized images, and buttons with plenty of space.
- Do not use hover, mouseover, or other interactive effectives that do not work on mobile.



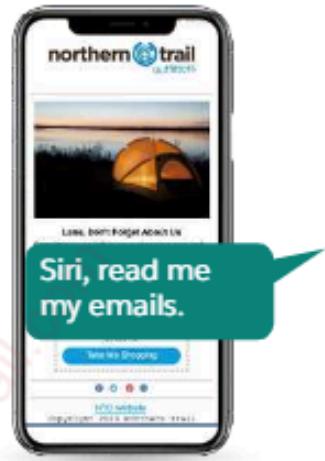
14

Designing for Accessibility



Design emails for everyone

- **Use Alt Text** – setting alt text on images will enable screen readers to accurately describe images.
- **Consider Color Contrast and Font Size** – a good contrast ratio and larger font size makes your emails easier to read.
- **Use Content Hierarchy** – this helps the subscriber know what to look at first and follow a logical order throughout the message.
- **Use Semantic Code** – use header (`<h1>`) and paragraph (`<p>`) tags so screen readers can more easily analyze content.
- **Set the HTML Language Attribute** – you can set this by using `lang=""` with the correct language code.



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Email Message Design: Test Your Skills



"We've been seeing low engagement and deliverability issues with our Welcome Email. Can you take a look and see if it has something to do with the design?"



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Join Me



4-1: Review NTO's Welcome Email

Goal:

Analyze NTO's Welcome Email for design best practices.

Instructions:

1. Navigate to Content Builder.
2. Locate the Welcome Email.
3. Analyze the Welcome Email design.



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NTO's Welcome Email - Review



No Personalization

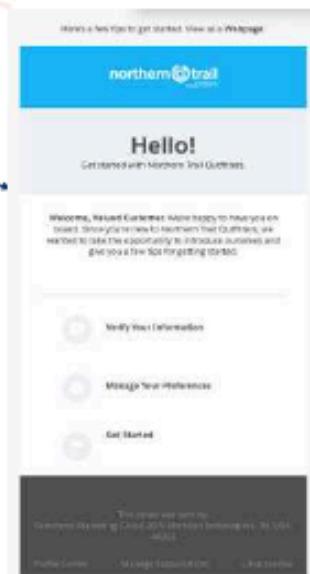
All Image Email

CTAs are Images

From: NTO
Subject Line: Welcome to Northern Trail Outfitters!
Preheader:

No Preheader

Difficult to see
Unsubscribe



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Email Message Design and Creation

Lesson Topics

1. Discover Email Design best practices to ensure best end user experience.
2. Develop effective, relevant messages using Content Builder.

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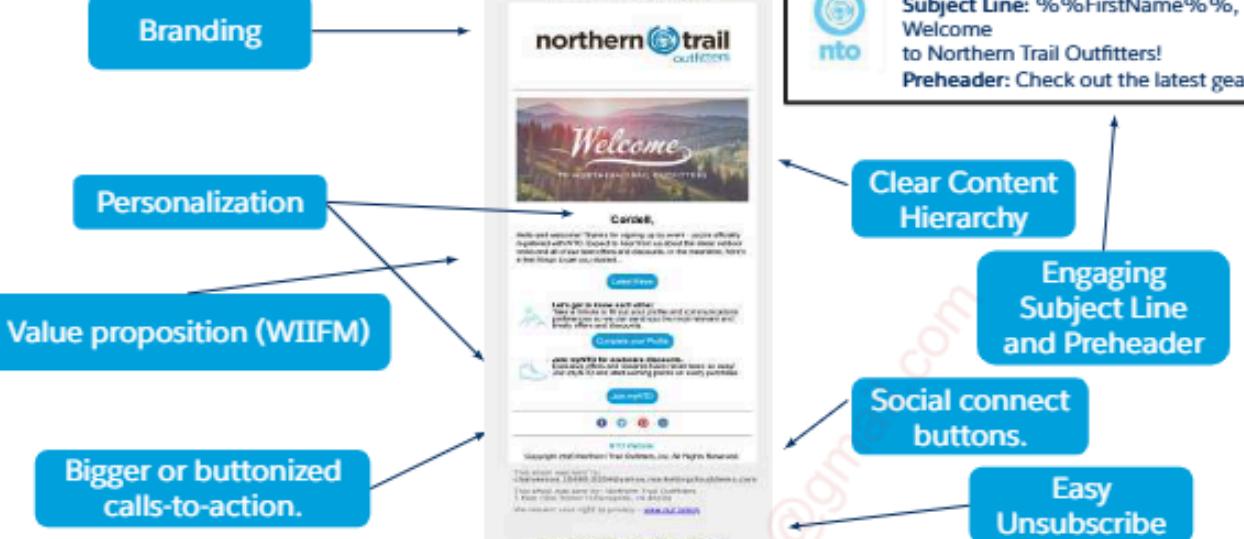
Email Message Design: Content Builder

“Thanks for reviewing the Welcome Email. Can you work with Michele to revise it according to best practices?”

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NTO's New Welcome Email



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What is Content Builder?



One connected experience, no matter the channel.

Usability

- Drag and Drop Editor
- Clicks not Code

Intelligence

- Einstein and Multi-Dimensional Tagging
- Intelligent Content Selection

Interactivity

- Interactive Email
- AMP for Email

Extensibility

- Sitecore and Dropbox Integrations
- Content Builder Block SDK

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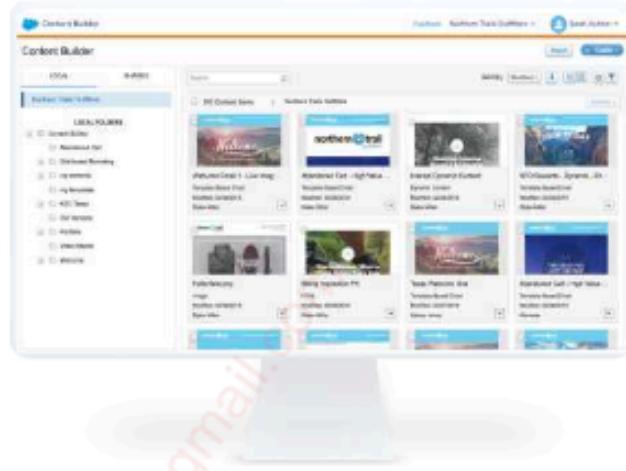


What can Content Builder do?



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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Organizing Content: Start with Folders



Organize content so that people can accomplish tasks easily within Content Builder.

Create a folder structure that works for your business. For example, NTO organizes its folders based on campaigns:

- Welcome
- Seasonal
- Post Purchase
- Re-Engagement



Folders can be local to a single Business Unit, or they can be shared to other Business Units in the tenant.

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Email Message Creation: Organization



"We need to make sure there's a folder for our Abandon Cart and Welcome campaign content. I'll show you how to create the structure. After that, we can upload the new content for our emails."



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Join Me



4-2 : Create Abandon Cart Campaign Folders

Goal:

Create a new folder structure in Content Builder.

Instructions:

1. Navigate to Content Builder.
2. Create Abandon Cart campaign folders.



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Your Turn



4-3: Create Welcome Campaign Folders

Goal:

Create a new folder structure in Content Builder.



Instructions:

1. Navigate to Content Builder.
2. Create Welcome campaign folders.

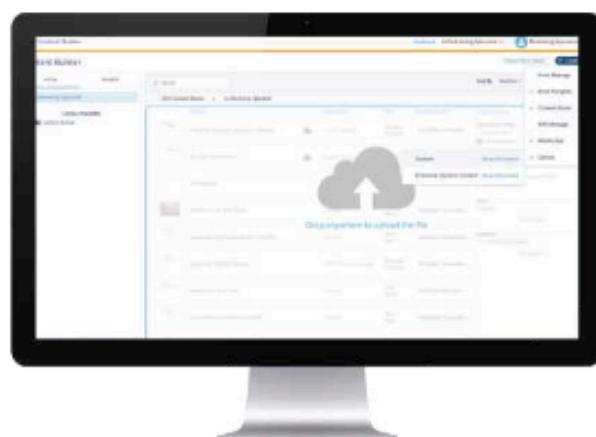
Upload Content



Drag and drop items straight from your desktop.

- New content will be created in the selected folder.
- Browse and upload from your document files.

Content Builder supports a variety of file types including documents, images, audio files, videos, code, and compressed.



RESOURCE:

Search Salesforce Help for
“Content Builder Supported
Files.”

Join Me



4-4: Upload Abandon Cart Content

Goal:

Upload image assets for NTO's Abandon Cart campaign.

Instructions:

1. Navigate to the Abandon Cart Images Folder.
2. Upload the images to the folder.



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Your Turn



4-5: Upload Welcome Content

Goal:

Upload image assets for NTO's Welcome campaign.

Instructions:

1. Navigate to the Welcome Images Folder.
2. Upload images to the folder.



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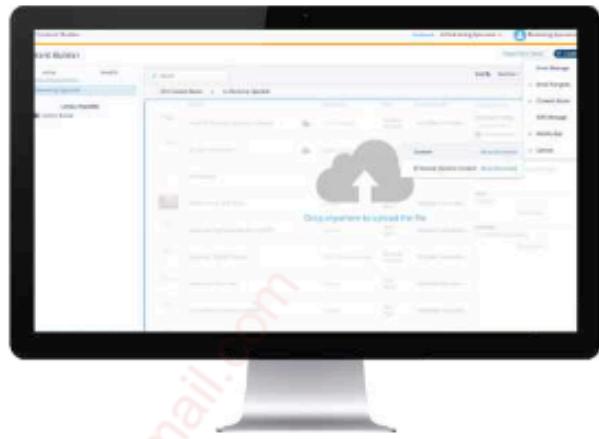
Label, Sort, and Search



Find content quickly and efficiently.

Tags

- A tag is like a label for a piece of content
- Use tags to quickly locate content
 - You can create nested tags for more complex tagging needs.
 - Einstein Content Tagging can automatically apply tags to image files by analyzing and tagging new images once every 24 hours.



Search

- Use intelligent, search-as-you-type features to find content easily.
- Further refine your search with filters.

Watch Me



4-6: Tag Abandon Cart Content

Goal:

Tag image assets for NTO's Abandon Cart campaign.



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Instructions:

1. Navigate to Content Builder > Abandon Cart > Images folder.
2. Tag Abandon Cart assets.
3. Tag camping and tent assets.
4. Tag hiking assets.
5. Test tags.

Your Turn



4-7: Tag Abandon Cart Content

Goal:

Tag image assets for NTO's Abandon Cart campaign.



Instructions:

1. Navigate to Content Builder > Abandon Cart > Images folder.
2. Tag Abandon Cart assets.
3. Tag camping and tent assets.
4. Tag hiking assets.
5. Test tags.

Email Message Creation: Templates



“We've got new branding, and we want to make some updates to the current template for upcoming campaigns. I'll show you how we create content blocks, too.”



Content Builder: Content Types



Content Blocks

A message is comprised of various content blocks. These are anything from image, to text, to buttons.



Email Templates

Templates provide you with a framework for your email. They include branding and content placement.



Email Messages

Build emails from scratch or use a template.



Mobile Messages

- SMS
- Mobile App Push Notification
- Line Carousel Message

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Content Editor



Intuitive drag-and-drop experience.

Easily create content with point-and-click editing.

Intelligent HTML paste tools such as color coding and line numbers.

Build, preview and send emails and templates in real time with an always-present preview, detailed subscriber preview and approvals.

Streamlined Sending workflow.

Integration with Litmus.



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Parts of a Template-Based Email



Template for layout and basic design



Content blocks containing, text, images, dynamic content, and more



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Template Creation



Existing Template

- Leverages easy-to-use tool.
- Allows email to be quickly assembled.
- No technical expertise needed.
- Choose from Basic, Empty, Themed, or Save Templates.
- Decide on banner, borders, and background.
- Thoroughly tested and fully supported on a variety of email clients (Desktop, Mobile, and Web).

Paste HTML

- Write HTML outside of the Email application and paste it into the application.
- Add standard template elements in your code.
- Flexibility and freedom in your design, as you have no restrictions with your layout.
- Must know how to write HTML; however, you only need to create a template once and then re-use it over and over.

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Email Template Options

Now Available!

Templates are now built with accessibility in mind.

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.

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Default Template Best Practices



Default templates streamline processes and are built to look great on all devices.

- Adjust content areas as needed.
- Add as many blocks to the content area as you want.
- Limit the number and type of blocks that can be dropped into the area.
- Lock a content area so it cannot be changed in emails created using that template.
- Edit the default "drop blocks or content here" message in the content area to allow the template creator to include instructions in each content area.
- Use Global Styles to easily change styles in one location and cascade those styles throughout the template or email.

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4-8: Create the NTO Template

Goal:

Create a template that can be used for NTO Communications.



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Instructions:

1. Configure the template properties.
2. Populate the banner with NTO image.
3. Configure the template style.
4. Edit the social follow block.
5. Change the link content block.
6. Edit bottom text content block.
7. Save the template.

Reusable Drag-and-Drop Content

The key to efficiency



Blocks

Baseline content creation tools



Content

Any content you want to reuse



Layouts

Advanced responsive content layout areas



Design

Set and lock template-level styling



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Types of Content Blocks: Basic Content



When you build a Content Block, you can choose from:

- Basic Content:
 - Button
 - Free Form
 - HTML
 - Image Block
 - Text



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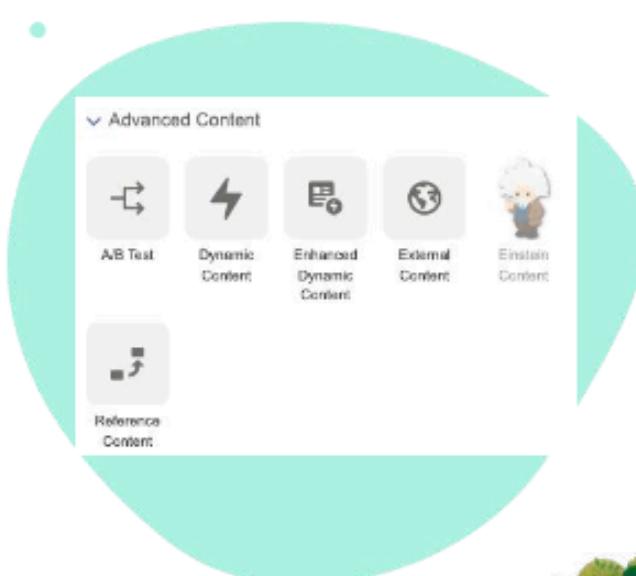


Types of Content Blocks: Advanced Content



When you build a Content Block, you can choose from:

- Advanced Content
 - A/B Test
 - Dynamic Content
 - Enhanced Dynamic Content
 - External Content
 - Einstein Content
 - Reference Content



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Types of Content Blocks: Interactive, Social, Custom



When you build a Content Block, you can choose from:

- Interactive Content
 - Email Form
 - Image Carousel
- Social Media
 - Social Follow
 - Social Share
- Custom
 - Behavioral Triggers

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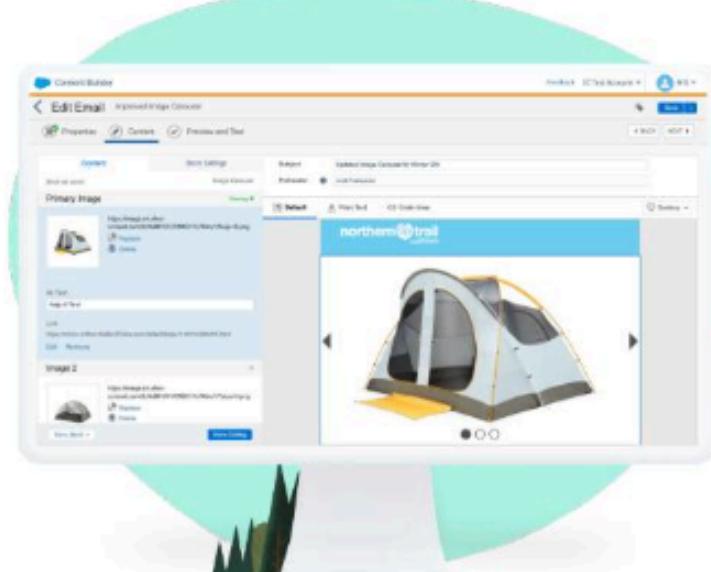


Image Carousel Block



- Expanded email client support
 - Works in 10+ email clients
- Improved accessibility
 - Usable with assistive devices and screen readers
- Showcase multiple products or views above the fold
 - Inform subscribers about a product without ever leaving their inboxes
 - Send more qualified visitors to your site

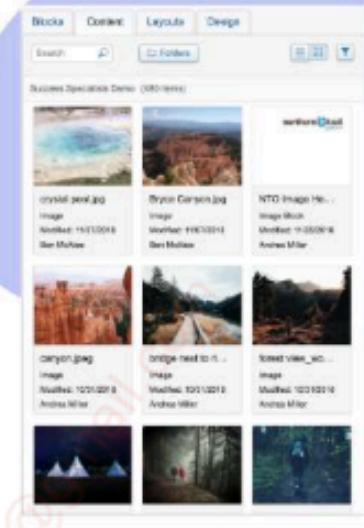
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Using Content in an Email



- Content is material that can be reused.
- Content is comprised of images or content blocks created for reuse throughout messages.
- Content can be any type of block.
- Use the Content tab to populate your message with any reusable content in your account.

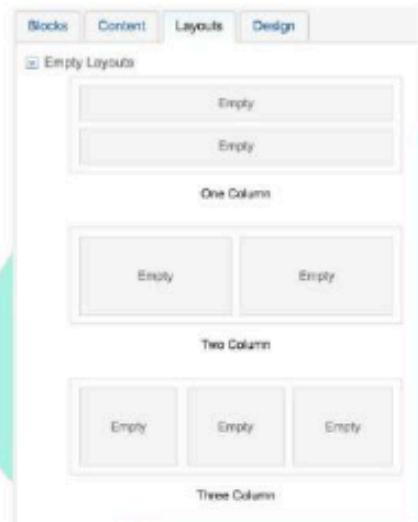


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Layout Content Blocks



- A layout content block is a collection of content blocks saved in one content area.
- Layouts are predefined, but can be edited to change the styling and splits.
- Layouts enable you to create complex content areas without writing HTML and CSS to create tables within your email.
- Use templates to lock a content area to prevent editing, limit the number of blocks a user can drop into a content area or restrict the type of content allowed.



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Using Design Tools



Content Builder provides design elements to control styling of emails.

- These options will change depending on what type of content is selected, but the primary Design Tab is related to the template.
- For templates, you may choose to limit the number and type of blocks that can be dropped into a content area.
- If the source template is changed after the email is created, use the Design tab to apply the new template to the email.

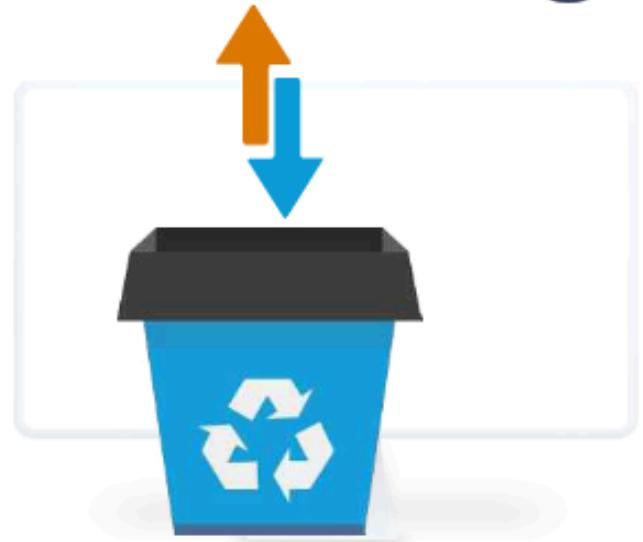
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Restore Delete Content



- Send recoverable content to the recycle bin.
- No longer requires a call to Support.
- User must have the Delete permission enable for the Content Builder Recycle Bin.
- User must own the content being restored.



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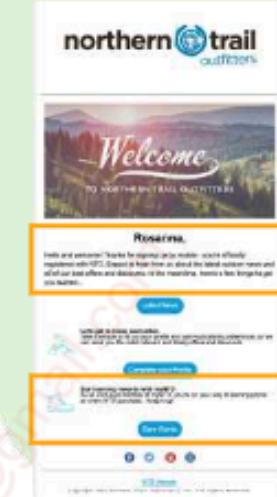
Static and Personalized Content



Static Content



Personalized Content



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Static Content



- Content that doesn't change from subscriber to subscriber.
- Low time commitment to create.
- Great for single messages or a unified call to action.
- Mix static and personalized content to create the most effective emails.



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Creating Content: Navigation



The Content Tab

- Use these tools to input and format your text, insert links and lists, and create tables.

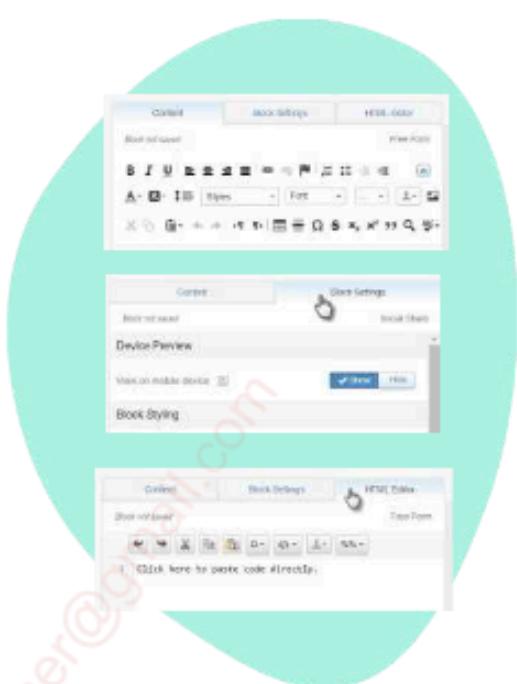
Block Settings Tab

- Use the Block Settings tab to format the actual content block.
- Style the block by selecting a background color, border, and padding size around the block.

HTML Editor Tab

- Use the HTML Editor tab to create and modify HTML for your content block.

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Join Me



4-9: Create the Complete Profile Content Block

Goal:

Create the Complete Profile Content Block to reuse throughout NTO's email communications.

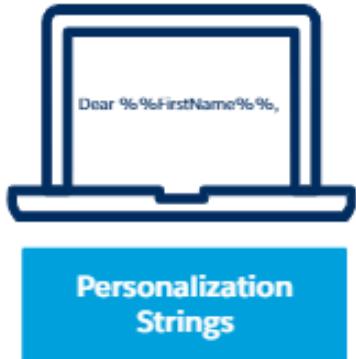


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Instructions:

1. Create a Layout Content Block.
2. Use a combination of text, image, and button blocks to create the static content.

Making Email Personal: Dynamic Content



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Dynamic Content



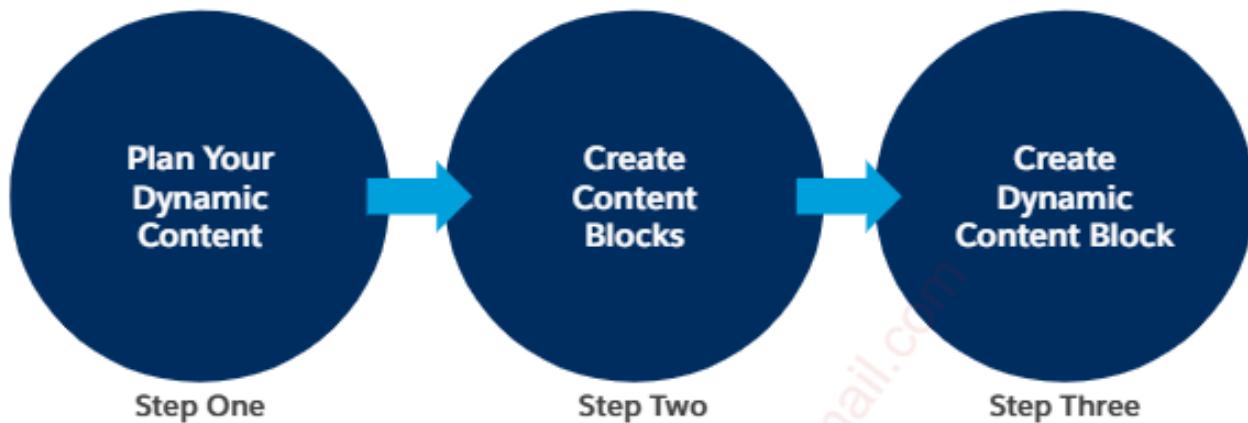
- Dynamic content is content that displays in a content area according to the rules that you define based on the subscriber data.
- By using dynamic content, you can ensure that a more tailored message is reaching your targeted audience.
- Default content is the content you specify in the Default Content attribute. This content displays when a subscriber does not meet a rule you created.
- To create a dynamic content rule, you need 4 elements: Attributes, Values, Operators, Content.

Tip:

Always upload/create the content you want to use to create dynamic content block.

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Steps to Create Dynamic Content



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Dynamic Content – NTO's Welcome Email



myNTO = False
Email:
jai@example.com



Join myNTO for exclusive discounts.
Exclusive offers and rewards have never been so easy! Join myNTO and start earning points on every purchase.

[Join myNTO](#)



myNTO = True
Email:
mai@example.com

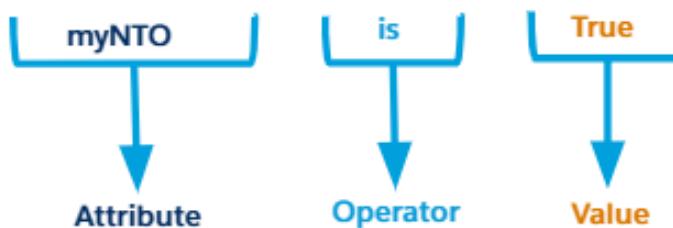


Start earning rewards with myNTO.
As an exclusive member of myNTO, you're on your way to earning points on every NTO purchase. Keep it up!

[Earn Points](#)

Default Content

Dynamic Content



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Dynamic Content Reference Option



Choose **Keep content blocks up-to-date** to apply future source block edits to emails using the block.

Choose **Make local copies of content blocks** if you don't want to apply source block edits to emails using the block.

Content Block Settings

Block not saved

Dynamic Content

Dynamic Block Options:

Keep content blocks up-to-date.

Make local copies of content blocks.

Default Content

VIEWING

Winter_Hiking.jpg (1)

Replace

Delete

Default_Content_Winter_Hiking.j...

Rule 1

women_creative.jpg

Edit

Delete

Replace

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Join Me



4-10: Create Content Blocks for Dynamic Content

Goal:

Create content blocks for use in Dynamic Content in the Welcome Email.



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Instructions:

1. Create a layout content block for loyalty members.
2. Create a layout content block for subscribers who have not joined the loyalty program.

Email Message Creation: Email Creation



"I think we have all the content that we need. Let's create the email now."



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Email Creation Best Practices



- ✓ Keep live, persistent preview on the right side of the page updates as changes are made, whether in Layout view or Code View.
- ✓ Save an email as a template for future use.
- ✓ Use templates as a starting point for a simplified email creation process, especially for content that is repetitive.
- ✓ Drag multiple blocks to any content area unless the content area is restricted by the template.
- ✓ Save reusable content block or layout while editing an email or template.
- ✓ Use the Page Tree View to move, nest and delete content blocks from an email without having to scroll through the email preview.

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Creating an Email



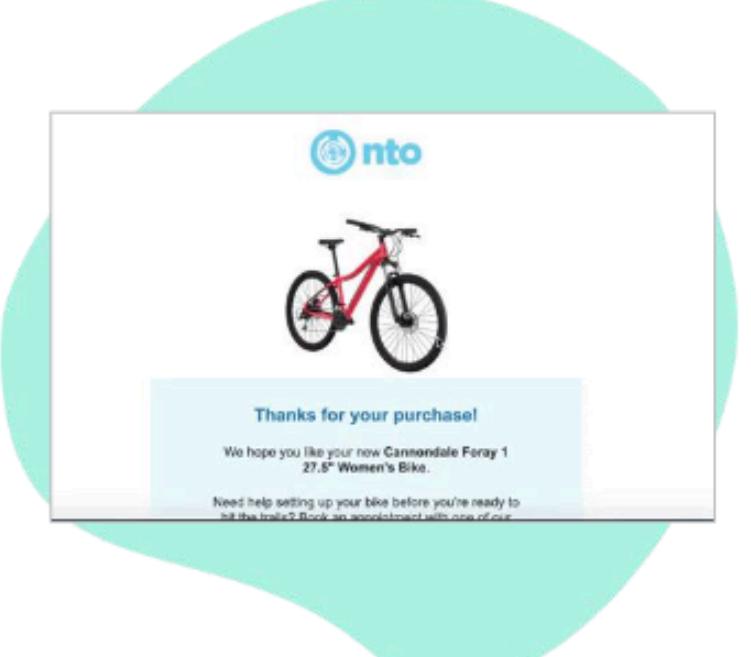
Template	Paste HTML	Text Only	Existing Email
<ul style="list-style-type: none">• Use this option to create a new email from an existing template.• Template must exist prior to using this option.• You can choose any template from Content Builder.	<ul style="list-style-type: none">• Use this option to paste in HTML for your message body.• Generally, HTML is created in an outside editor and pasted into the Email application.• This option does not use a Template.	<ul style="list-style-type: none">• Use this option to create a text-only email.• No HTML will be created or sent, regardless of the subscriber's preference.	<ul style="list-style-type: none">• Use this option to create an email from a prior email.• Use this to move Classic Emails to Content Builder.

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AMP for Email



- Encourage In-Email Interaction
 - Provide actionable in-mail capabilities like appointment bookings or submitting RSVPs.
- Deliver Real-Time Personalization at Open
 - Use data from Salesforce ecosystem to drive timely personalization and update information.
- Leverage the Power of AMP in Content Builder
 - Secure and integrate with Content Builder creation tools to support sending of AMP Emails.



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Making Email Personal: Personalization Strings



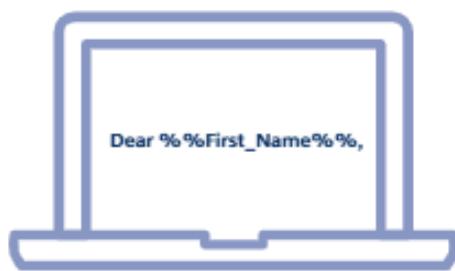
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What is a Personalization String?



Definition

- 1 A personalization string lets you insert subscriber data, such as first name, into your emails.
- 2 Personalization strings can be in the body of the email, the subject line, and the preheader.
- 3 You may hear personalization strings referred to as merge fields or substitution strings.

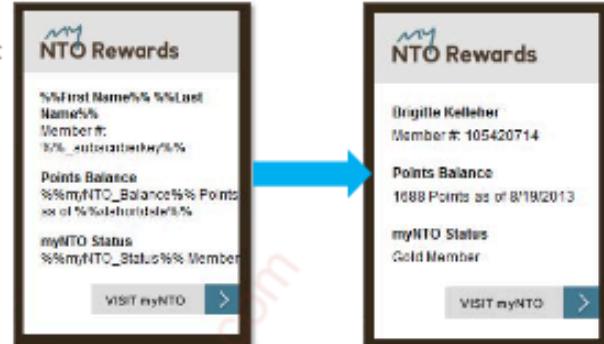


66

Personalization Strings



- In addition to the subscriber attributes, you can insert system data personalization strings:
 - Email data
 - (%%xtshortdate%%)
 - Recipient data
 - (%%_subscriberkey%%)
 - Standard Link data
(%%profile_center_url%%)
- Easily insert personalization strings using the drop-down in a Content Builder Content Block.



RESOURCE:

Search Salesforce Help for
“Personalization Strings in
Email Studio.”

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Making Email Personal: AMPscript



Dynamic Content



Personalization
Strings



AMPScript

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What is AMPscript?



Definition

- 1 AMPscript is a scripting language used in Salesforce Marketing Cloud.
- 2 Creates advanced personalization in Marketing Cloud Content - Emails, SMS, PUSH and Landing Pages.
- 3 Has a variety of functions for Salesforce CRM Objects and Records.



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Cleaning Data with AMPscript



The data set used in your emails may not be optimized for customer visibility.

FirstName	LastName	Interest	myNTO	myNTOLevel
KENNITH	HILDRETH	CAMPING	TRUE	Platinum
dendra	Musgrove	Training	False	
Shena	gladden	camping	True	Silver

We don't want to say "Hello KENNITH," so how can we avoid this?

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AMPscript Data Cleaning Functions



Propercase

Propercase can be used to ensure proper capitalization is applied to names.

EX: Hello BOB → Hello Bob

Lowercase

Lowercase returns the specified value in all lowercase letters.

EX: You love Hiking and NTO Gear
→ You love hiking and NTO Gear

%=%=Lowercase(Interest)=%%

Uppercase

Uppercase returns the specified value in all uppercase letters.

EX: Happy Anniversary!
→ HAPPY ANNIVERSARY!

%=%=Uppercase(Greeting)=%%

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Personalization Strings and AMPscript



- A personalization string is commonly known as a substitution string or mail-merge field.
- While they are similar in syntax, they are not technically AMPscript.
- Personalization Strings consist of an attribute or system value enclosed by two percent symbols.

Welcome
to the Platinum
Membership program,
%%FirstName%%
%%LastName%%!



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Join Me



4-11: Create NTO's Welcome Email

Goal:

Create a Welcome Email for all subscribers who opt-in to NTO communications.



T3

Instructions:

1. Create a template-based email using the NTO Template.
2. Add content using layouts, images, and text.
3. Add Dynamic Content.

Email Message Design: Low Cart Value



“The welcome email looks great. Can you create the emails for the Abandon Cart campaign, too?”



T4