

Join Me



6-10: Validate, Activate, & Run the Welcome Journey

Goal:

Validate and Activate the journey.



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Tasks:

- Validate the journey.
- Examine validation results and fix any errors.
- Activate the journey.
- Run the Welcome Series Journey Entry automation.

Journey Testing



Use Journey Builder's test features to confirm that a Marketing Cloud journey behaves as expected after activation.

When you use a data extension as the entry source, you can configure a test to simulate a journey with real contacts. But the classic test mode is available with any entry source.



Once your journey is Validated, it can be tested.

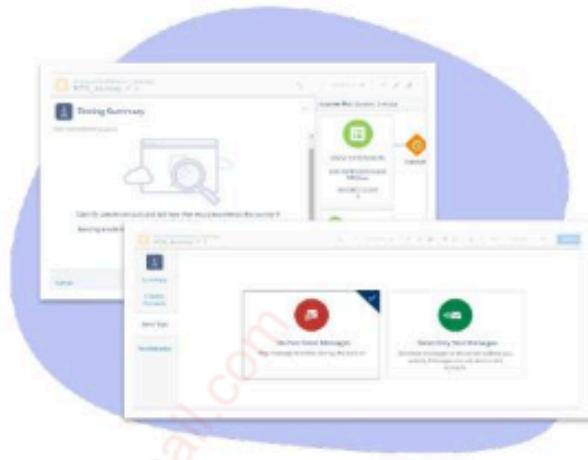
100

Journey Testing with a Data Extension



Preview how a Journey runs without impacting actual customers:

- Ignores wait times and contact entry settings.
- Simulates random and decision split activities.
- Choose to send emails to up to 10 individual contacts.
- You can also choose not to send any messages.
- After the test is complete, the journey canvas displays each contact's expected path.



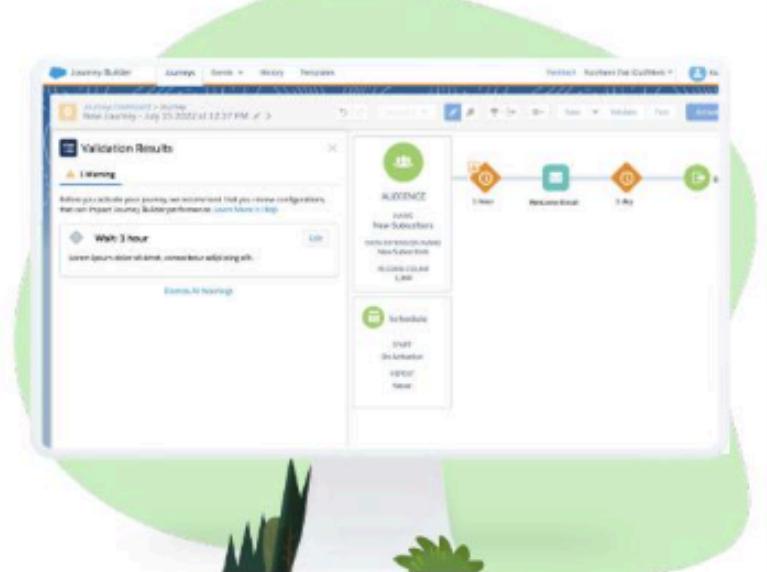
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Journey Builder Warnings UI



Proactive warnings surfaced to users if a bad practice is detected.

- An alert icon will surface on the journey canvas as part of journey validation.
- A warning explanation will be displayed on the tab view.



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Versions



- Update a Journey without having to stop an active running Journey and eject all contacts currently in the population.
- Retains metrics of previous versions in order to contrast and compare different strategies and content.
- Journey Modes:
 - Draft
 - Testing
 - Running
 - Finishing
 - Paused
 - Stopped

The screenshot shows the 'Journey' tab in the 'Journey Builder' interface. On the left, a preview window displays a single step: 'Data Extension Name: abandoned_cart_1' with a record count of 141. On the right, a table lists six versions of the journey:

VERSION	STATUS	LAST MODIFIED
Version 1	Draft	Aug 2nd 2023, 0:51 pm
Version 2	Testing	Aug 22nd 2023, 1:11 pm
Version 3	Running	Aug 10th 2023, 11:23 am
Version 4	Finishing	Aug 10th 2023, 11:23 am
Version 5	Running	Aug 10th 2023, 5:11 pm

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Test, Compare, Revise



Use versions to iterate on your campaign. Compare results, then modify based on your insights.

Only one version can be active at a time. A journey version is a draft until it is activated. Only one journey version can be active at a time, and only an active journey can receive new contacts through the entry source. Once a version is active, you cannot modify or edit entry sources or activities on the canvas. To make changes, create another version.

Contacts will not move to a new version until exiting a previous one. Contacts in the previous version don't move to the new version but process through the original journey version until they exit. A previous version will have a status of Finishing until all contacts have exited.

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Stopping a Journey



Don't stop a running journey.

- You can create drafts from an inactive or stopped journey, but inactive or stopped journeys cannot be restarted or relaunched.
- A stopped journey immediately halts the activities and ejects all the contacts in the journey.
- *NEW in Winter 24:* Journeys can be managed in bulk - Stop up to 10 Journeys at once from the main Journey Dashboard.

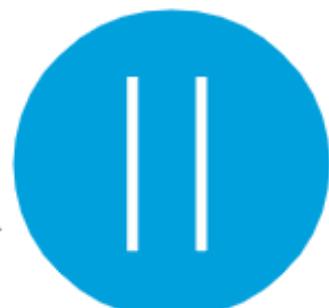


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Journey Pause



- Pause a running journey and halt processing contacts for up to 14 days.
- Options for extending Wait Activities and queuing contacts are available.
- When a Journey is paused, contacts that are already processed by Journey Builder but are queued up for sending by the messaging activities will not be paused.
- Journeys cannot be resumed on a specific date/time.
- Paused journeys cannot be edited.

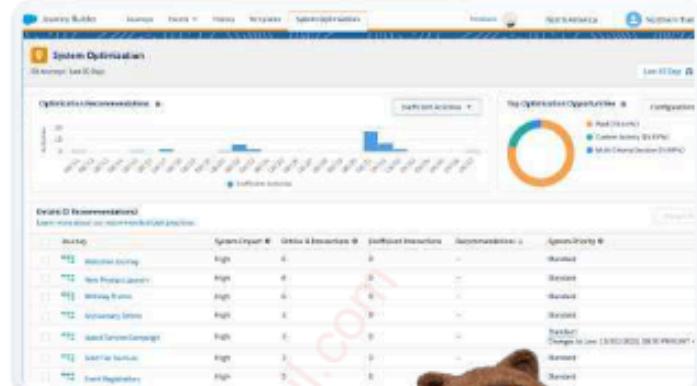


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System Optimization Dashboard



- New in Winter 24! Journeys will proactively surface warnings if a journey step will impact performance or scale.
- Easily view journey priority and change journey speeds relative to one another.
- Automatically analyzes your account and shares optimization suggestions.



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Journey Builder: Path Optimizer

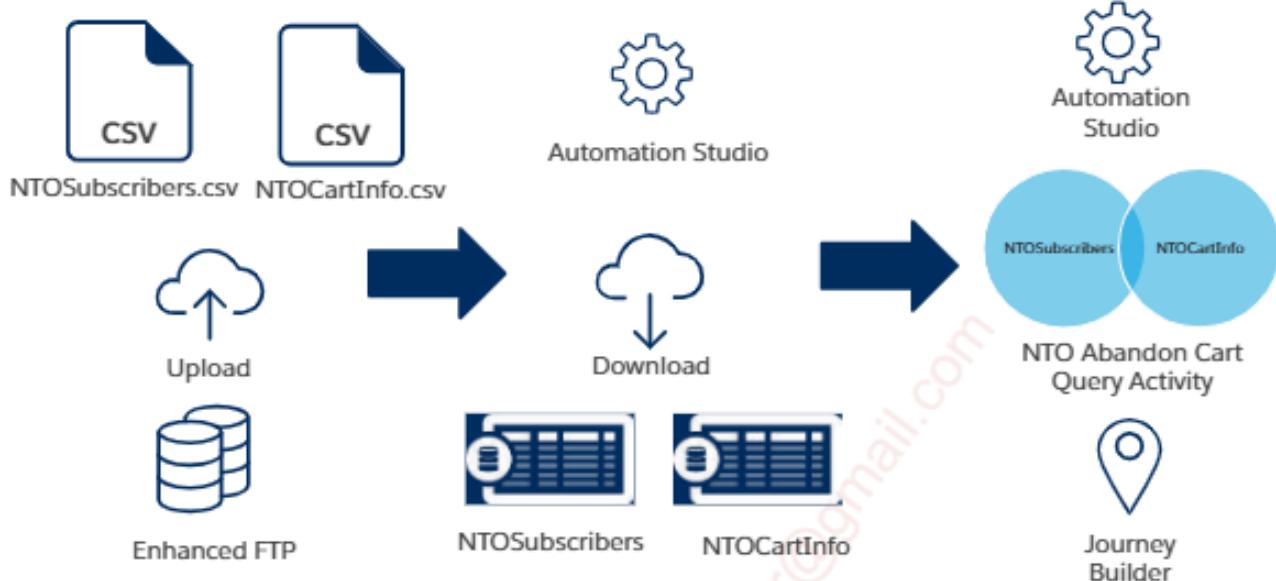


"Isabelle wants us to test if our current Abandon Cart Strategy is effective. We want to test two different subject lines against each other."



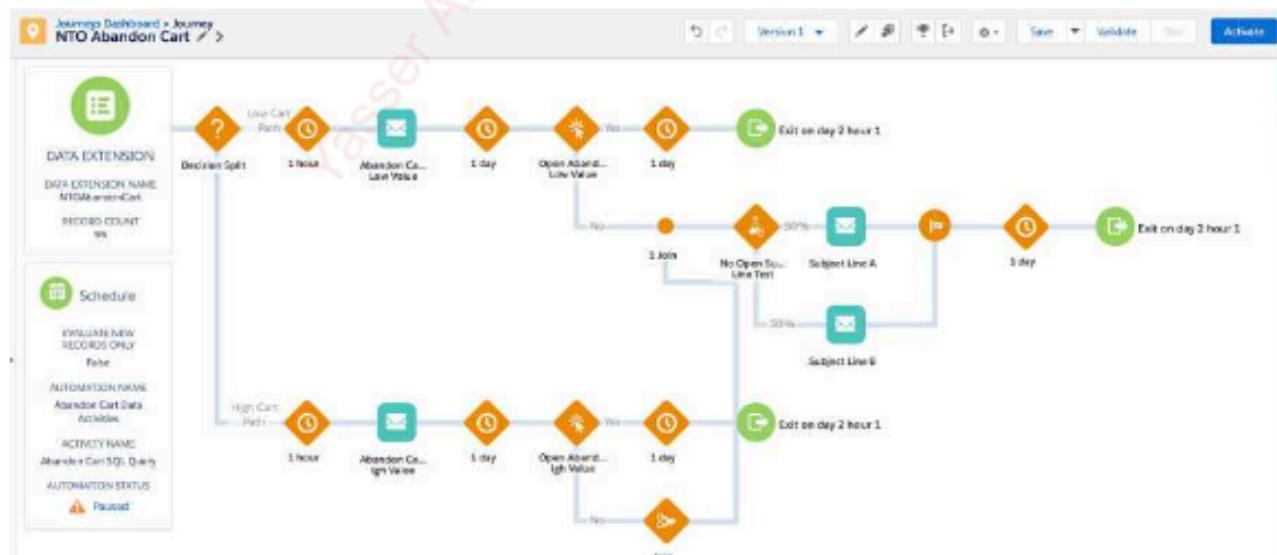
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NTO Abandon Cart Journey



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NTO's Abandon Cart Journey



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Test with Path Optimizer



- Configure automatic or manual winner tests with up to 10 paths.
- Go beyond email testing and include Journey Builder activities.
- System automatically picks winner based on email engagement or user can manually select winner.
- Losing paths stops receiving contacts and only the winning path receives new contacts.



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Go Beyond A/B Testing

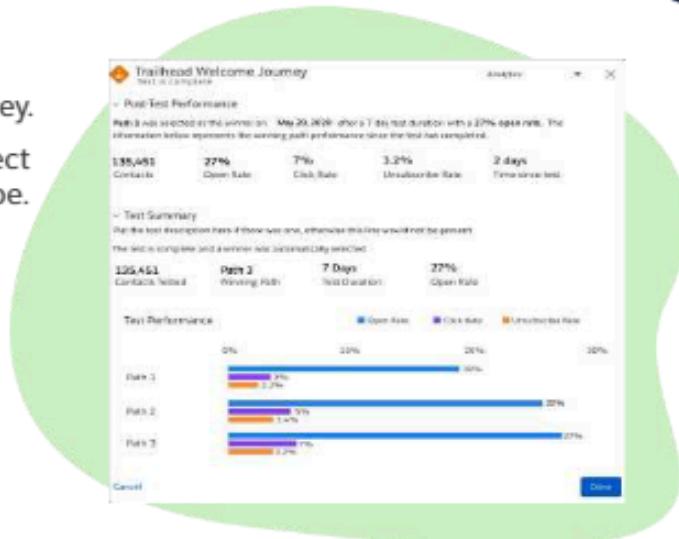


A path is a sequence of events in a journey.

Path variations can be minor, like a subject line, or major, like a different channel type.

Here are some ideas:

- Subject Line and Preheader
- Personalization
- Content
- Wait Time
- Send Time
- Channel



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Creating a Path Optimizer Activity



Configure a Winner

Path Optimizer selects a winner based on either email engagement or manual selection.

- Select email engagement if you want Journey Builder to choose a winner automatically within a time frame you select based on either the highest click rate, the highest open rate, or the lowest unsubscribe rate.
- Select Manual Selection if you want to pick the winner after the test is complete. This is a great option if you want to track both opens, clicks, and unsubscribe rates.

Split and Holdback

- A split determines the distribution of people across the various paths.
- Configure a Holdback to allow a percentage of your audience to wait to receive the winning path.

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Expandable & Collapsible Paths



Streamlining Journey navigation has never been easier.

Expandable and collapsible paths are now available in Journey Builder.

- In running journeys, you can now expand or collapse all journey activities at once.
- Collapsing activities (Decision Splits) also updates the journey canvas size.
- Zoom in on certain sections of the canvas to review configuration builds or troubleshoot.



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Join Me



6-11: Create Abandon Cart Campaign & Test with Path Optimizer

Goal:

Create the Abandon Cart Campaign Journey and use a Path Optimizer Activity.



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Tasks:

1. Create and define the journey, settings, and entry source.
2. Add a Path Optimizer Activity to the canvas.
3. Configure the Path Optimizer to test two different subject lines.
4. Validate and Activate the journey.

High-Throughput Sending in Journey Builder



You can now enable High-Throughput Sending (HTS) by default when creating a journey with the Create New Journey flow. This change doesn't apply to new journeys or journey versions created by cloning an existing journey version.

Contact Entry (Required)
Select contact entry mode:
 Necessary
 Identity profile
 Recently engaged setting

Default Email Address (Required)
 Use email attribute from entry source
 Use email attribute from Contact

Default Mobile Number (Required)
 Use primary mobile attribute from entry source
 Use mobile number attribute from Contact

Journey Builder High-Throughput Sending
Enable High-Throughput sending on the same activities in this journey. Before proceeding, read the tracking and report limitations in Salesforce Help.

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Using Journey Builder & Automation Studio Together



Automation Studio imports and transforms customer data, preparing it for Journey Builder messaging.



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Journey Builder



Visual, Drag and Drop Campaign Creation

Marketer friendly interface for building multi-path/ multi-channel messaging flows



1-to-1 Messaging at Scale

Easy-to-build decision logic lets marketers build highly segmented campaigns (without queries), forging an individualized path for each contact based on their attributes, behavior, and engagement



Goal Driven Marketing and Optimization

Set behavior-based goals for marketing campaigns, and continually optimize journeys based on progress

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Automation Studio



Advanced Segmentation

Customers can write advanced SQL Queries and Data Filters, allowing for sophisticated engagement based Segmentation.



Extract, Transform & Load

Automation Studio allows customers to bring their data into the Marketing Cloud. Zipped and Encrypted Files can be processed and Enriched with additional data sources. Also engagement data can be extracted from the Marketing Cloud for external use.



Journey Orchestration

Automation Studio allows customers to determine the right Contacts for the right Journeys.

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Feature Comparison



Feature Comparison Chart	JB	AS
Data Extract – create a file of information for you to use outside of the application. It can also be used to transform an XML file to a comma-delimited, tab-delimited, or pipe-delimited file for import into your account.		✓
Import File – to use information from an outside file to update the data extension.		✓
Report Definition – define parameters for running a report once and leverage it every time the report is run using the activity.		✓
SQL Query – use SQL to create a query that will retrieve data extension or data view information that matches your criteria and include that information in a data extension.		✓
Transfer File – upload a file to or download a file from a transfer location that you specify.		✓
Send Email or SMS – automate the sending of an SMS message; can be used for a single-send or in a sequence with other activities.	✓	✓
Filter – apply the logic of a data filter to a data extension you select to create a group of subscribers who satisfy the filter criteria.	✓	✓
Wait – cause the automation to wait for a specific period of time before performing the next step/activity.	✓	✓
Test Splits – set up tests as part of the workflow to easily conduct timing, creative, and channel tests to boost campaign performance.	✓	
Campaign Goals – set up business goals for your marketing campaign and have system listen to see if users accomplish goal.	✓	
Campaign Metrics – see how many people are in an interaction, how many or what percentage have accomplished a specified goal, etc.	✓	
Sales & Service Cloud Activities - Update or create Sales Cloud objects or records as a result of contact behavior	✓	

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Use Case 1: Daily Data Load



Use Case: Customers that have external database(s) of record need to bring this data into the Marketing Cloud to drive marketing. Normally this is Daily or Hourly and based on “Delta Files”.

Journey Builder	✖ Data management tools are not a part of Journey Builder.
Automation Studio	★ There are a wide selection of data processing tools available in Automation Studio.
AS + JB	N/A

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Use Case 2: Welcome Series



Use Case: A Company gets a new Customer and would like to send out a series of Messages to nurture their new customer and welcome them to their brand.

Journey Builder	★ An API Entry Source or Salesforce Data Event, depending on the data source, is preferred, if only using Journey Builder.
Automation Studio	✖ The only scenario when AS should be used stand alone is if the hourly Message volume is higher than 2,000,000.
AS + JB	★ Automation Studio can be used to process and segment the data. Journey Builder should be used to send the series of Messages to take advantage of powerful features such as engagement and decisions splits and more.

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Use Case 3: One-Time Send



Use Case: Sending a Coupon to a very large segment of your customer base.

Journey Builder	★	A Single Send Journey is the preferred approach since the Marketing team can easily configure this solution on their own.
Automation Studio	▲	If the entry filter is complex and/or the initial Message volume is greater than 2,000,000 per hour then it would be best to use an AS only solution for this use case.
AS + JB	★	If the entry criteria requires advanced segmentation, then AS can be used to prefilter this Journey.

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Triggered Emails



- A triggered email is a message sent to an individual executed from an event that happens outside the Marketing Cloud.
- Triggered Emails are one-off email sends (not drip campaigns).
- They are highly anticipated and frequently opened.
 - Examples include:
 - Shipping Notices
 - Purchase Confirmations
 - Welcome Emails
 - Registration Confirmations

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Triggered Email Process



Complete Preparation

(Email,
Send Classification,
Data Extension)



Create Triggered Email Definition



Put Trigger in place via the API



Start Triggered Send

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Triggered Sends or Transactional Journeys?



Triggered Sends

- Managed in Email Studio
- Uses SOAP API
- Priority determines how fast the message sends (applies multiplier to super messages)
- Can be commercial or transactional

Transactional Journeys

- Unified sending experience – manage everything in Journey Builder
- Easy-to-Access Analytics
- Real-time operational data using webhooks
- Uses simple, consistent REST APIs
- No priority – always sends as quickly as possible (less super messages)
- Used only for transaction messages

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Which Send Method Is Best?

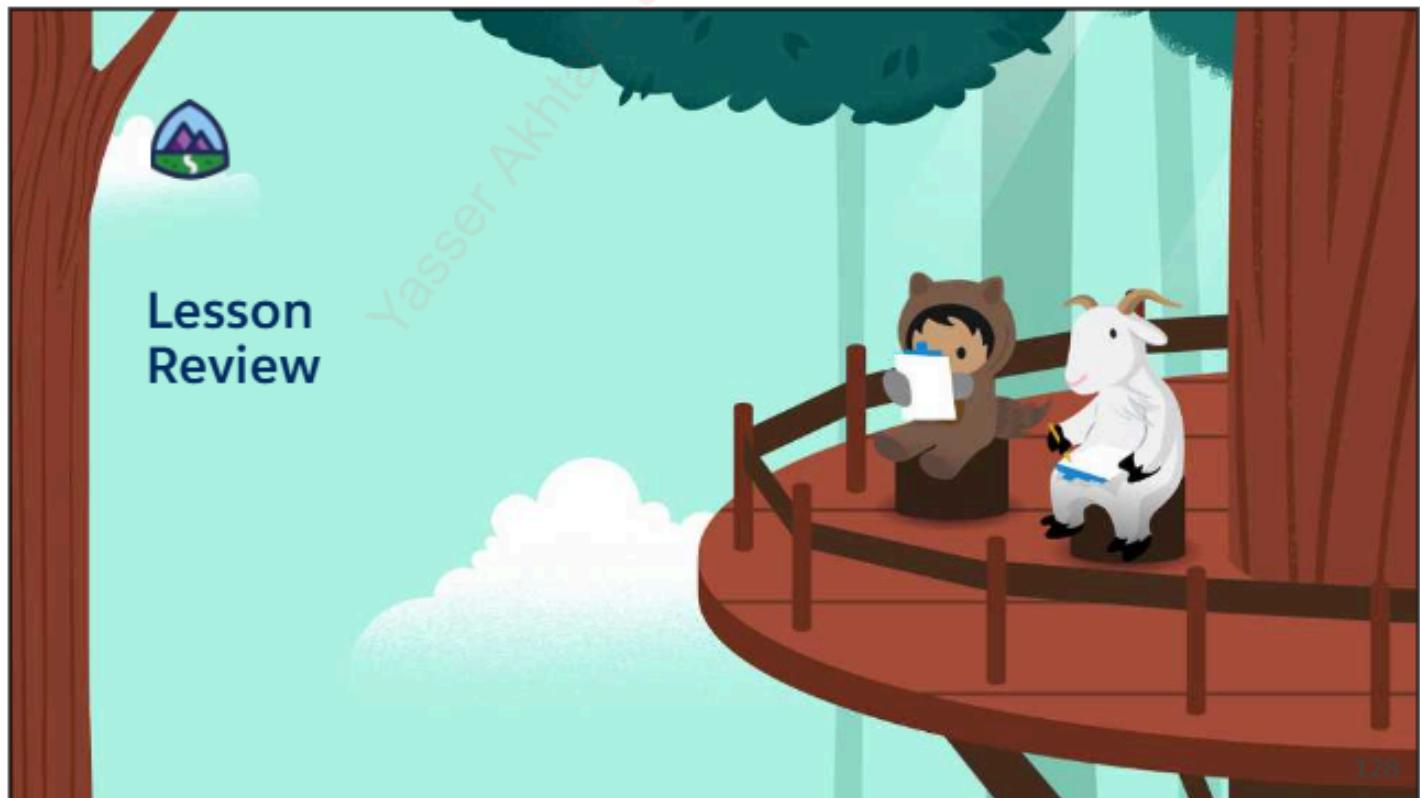


Scenario	Send Flow	Single Send Journey	Automation Studio	Multi-Step Journey	Transactional Journey	Triggered Email
Monthly Newsletter						
Abandon Cart Campaign						
Re-engagement Campaign						
Purchase Confirmation						
Batch Shipping Notices						
Shipping Notice/Product Review						
Product Recall with follow-up based on engagement						
Birthday Email						
Loyalty Campaign with a goal for 40% of members to redeem personalized offer						

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Lesson Review

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Lesson Review



Question 1:

NTO needs to automate the importing of data into MC and would like to set up data import activities that kick off automatically once a file is placed on the FTP.

What type of automation could initiate this data import setup?

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A: File Drop Automation

B: API Event Automation

C: Scheduled Automation

D: Data Extract Automation

Lesson Review



Question 2:

NTO receives an encrypted file on the SFTP nightly that needs to be imported every morning at 4:00 am and segmented to utilize for several daily campaigns.

What automation flow should NTO utilize?

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A: File Drop > Data Copy or Import File > SQL Query

B: File Drop > File Transfer > Data Copy or Import File > SQL Query

C: Schedule > Data Copy or Import File > SQL Query

D: Schedule > File Transfer > Data Copy or Import Activity > SQL Query

Lesson Review



Question 3:

What should be considered when adding multiple activities within one step using Automation Studio?

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A: All activities within one step execute from top to bottom.

B: There cannot be more than one activity per step.

C: All activities within one step run at the same time.

D: If one of the activities in the step fails, it is skipped & the automation proceeds to the next step.

Lesson Review



Question 4:

When defining the Contact Entry Settings, which would a marketer select if they are injecting contacts in a journey post purchase to complete a survey but want to avoid sending too many survey emails if multiple purchases are made?

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A: Re-entry anytime

B: Einstein Send Time Optimization

C: No re-entry

D: Re-entry only after exiting

Lesson Review



Question 5:

A marketer needs to send a welcome email every day. The filter for the data is simple.

What sending tool should they use?

A: Send Flow

B: Send Activity

C: Multi-Step Journey

D: Single Send Journey



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Lesson Review



Question 6:

A marketer was just given creative and asked to send a flash sale email. This is a one-time send to less than 500,000 subscribers.

What sending tool should they use?

A: Send Flow

B: Send Activity

C: Multi-Step Journey

D: Single Send Journey



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Lesson 6: Hit the Trails!



Trails:

[Manage Campaigns with Journey Builder](#)

Modules:

[Journey Builder Basics](#)

[Journey Builder Campaigns](#)

[Path Optimizer in Journey Builder](#)

[Transactional Messaging](#)



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Marketing Automation: Helpful Resource Links



Optimize Journey Builder Performance

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

Automation Studio Activities

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

File Locations (includes information about Safehouse)

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

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Lesson 7

Analytics and Troubleshooting



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

Lesson Objectives

By the end of this lesson, you will:

- Learn about measuring the impact of your email send, common issues, and how to troubleshoot.
- Analyze marketing campaigns using common KPIs.
- Solve a common marketing problem using troubleshooting guidance.

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Analyzing Marketing Campaigns



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Email Tracking



“Could you pull the tracking data for the Newsletter Email Send?”



Isabelle
Manager of
Digital Marketing

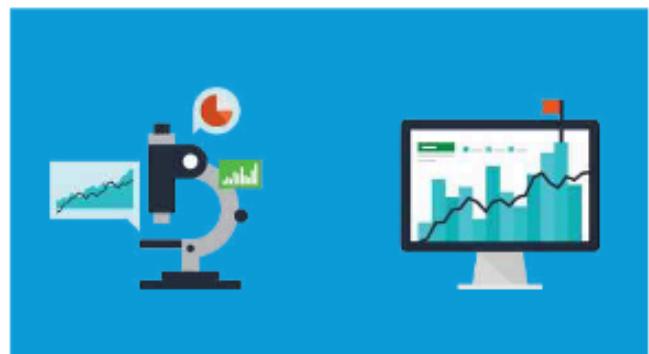
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Email Tracking Metrics



Tracking is a result of your email send.

Marketing Cloud makes it easy for you to get clicks, open, and more for every message you send.



6

Email Metrics that Matter to Marketers



Email Open Metrics

Opens

Total number of opens (includes duplicates)

Unique Opens

Number of opens by an individual user (de-duplicated)

Open Rate

Number of Unique Opens per Delivered Email, expressed as a percentage

Email Click Metrics

Clicks

Total number of clicks (includes duplicates)

Unique Clicks

Number of clicks by an individual user (de-duplicated)

Click Through Rate

Number of Unique Clicks per Delivered Email, expressed as a percentage

Other Metrics

Click to Open Rate

Unique Clicks divided by Unique Opens

Unsubscribes

Number of users who unsubscribed from the email send

Complaints

Number of Spam Complaints received

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Email Tracking Overview



Email Tracking Overview							
Tracking		Overview	Content	3 Workflows	4 Marketing	A/B Testing	Reporting
My Reports							
1	Mr. Kapoor	1	2	3	4	5	6
2	Marketing Specialist	3	4	5	6	7	8
3	Marketing Specialist	4	5	6	7	8	9
4	Marketing Specialist	5	6	7	8	9	10
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138	Marketing Specialist	139	140	141	142	143	144
139	Marketing Specialist	140	141	142	143	144	145
140	Marketing Specialist	141	142	143	144	145	146
141	Marketing Specialist	142	143	144	145	146	147
142	Marketing Specialist	143	144	145	146	147	148
143	Marketing Specialist	144	145	146	147	148	149
144	Marketing Specialist	145	146	147	148	149	150
145	Marketing Specialist	146	147	148	149	150	151
146	Marketing Specialist	147	148	149	150	151	152
147	Marketing Specialist	148	149	150	151	152	153
148	Marketing Specialist	149	150	151	152	153	154
149	Marketing Specialist	150	151	152	153	154	155
150	Marketing Specialist	151	152	153	154	155	156
151	Marketing Specialist	152	153	154	155	156	157
152	Marketing Specialist	153	154	155	156	157	158
153	Marketing Specialist	154	155	156	157	158	159
154	Marketing Specialist	155	156	157	158	159	160
155	Marketing Specialist	156	157	158	159	160	161
156	Marketing Specialist	157	158	159	160	161	162
157	Marketing Specialist	158	159	160	161	162	163</

Email Tracking Individual Send



The screenshot shows the Mailchimp Tracking workspace for an individual email send. The interface includes a left sidebar with tracking categories like My Tracking, Audience, Audience Builder Sends, List Sends, etc. The main area displays the following sections:

- 1. Summary:** Shows General Key (100), Name (Last Value Email - 040615), Subject (Don't forget about us!), Last Published On (18/02/2016), and Total Rec'd (281).
- 2. Detail Performance:** A donut chart showing Delivery Rate (59.723%) and a bar chart showing Open Rate (43.056%).
- 3. Click Activity:** A bar chart showing Clicks (37) and Click Rate (4.323%).
- 4. Unsubscribe:** A table showing Unsubscribe activity with 4 unique users.
- 5. Unsubscribe Summary:** A bar chart showing Unsubscribed (343), Delivered (218), and Clicked (265).
- 6. Forward to a Friend Activity:** A table showing Clicked Forward Link (8), Forward Activity (8), and New Subscribers (8).
- 7. Report:** A section for generating reports.

9

Watch Me



7-1: Review Tracking Results

Goal:

Explore the Tracking Workspace.



10

Instructions:

1. Navigate to the Tracking Workspace.
2. Examine the tracking for the Newsletter Email.
3. Explore tracking options.

Tracking Tips



- Sort sends into folders for different kinds of sends, such as test sends, triggered sends, or specific campaign sends.
- Message opens are tracked using a tracking pixel* in your emails. If a user turns images off, the message isn't considered "opened." This can cause clicks to be higher than opens.
- In addition to overall data, you can view data for specific subscribers and even export and share tracking data.
- Tracking data stays in your account as long as your account exists.

*If you use HTML Paste when creating emails/templates, you will be prompted to add the tracking pixel code.

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Journey Builder Analytics



Journey Builder Dashboard – Get an overview of overall journey performance.

Message Analytics – See analytics for individual messaging activities within a journey.

Single Send Journey Tracking – View tracking details for a single send journey.

Journey History – Search and filter contact history for each journey.



12

Journey Dashboard



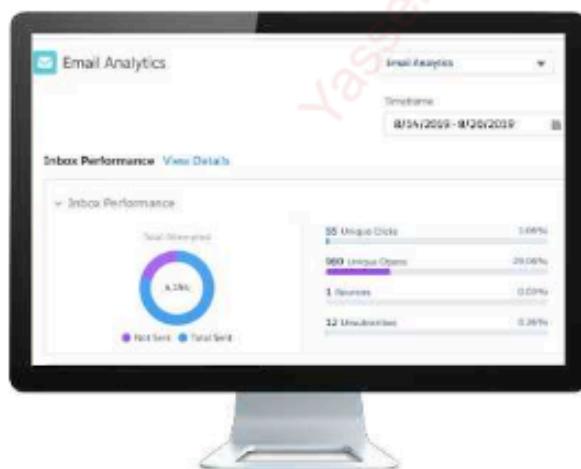
The dashboard allows users to:

- Open a journey.
- Sort journeys by Title, Status, or Last Modified date.
- Filter the list.
- See goal attainment analytics.
- Apply and filter by tags.
- Create journeys.



13

Journey Message Analytics



14

Message Analytics

These metrics display the cumulative population that has flowed through each activity, as well as the percentage of contacts who have met the goal at a particular wait activity.

Engagement Metrics for Single Send Journeys



Track messages to measure effectiveness of a Journey:

- Status
- Channel
- Message Delivery Rate
- Open Rate
- Click Rate
- Bounce Rate
- Unsubscribe Rate.

View subscriber-level engagement details directly from the Journey.



15

Journey History



Use Journey Builder's Journey History feature to view information about a specific contact, journey or journey version.

- View activity and status history for contacts, journeys or journey versions
- Displays last 30 days by default
- Includes total number of contacts across all journeys
- Set filters for date range, activity, status or journey



16

Show Contact Path



- More easily troubleshoot what happened with a particular contact and take quick action.
- Find an individual contact in an active or stopped journey and see the path they've traversed in the last 30 days.
- Determine whether the contact is still active, has completed the journey, or exited early.
- Optionally remove the individual if needed.



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Recent Contacts by Activity



- For each activity in a journey (excluding Waits), view the specific contacts processed in the last 30 days.
- Understand the success and error rates of activities, right from the canvas.
- When an error occurs for a contact, view the details of the error to more efficiently resolve the issue.



18

Analytics Builder



"We're getting new requests for reports. I'll show you Analytics Builder."



19

Marketing Cloud Reports



- Provide an easy-to-use data analytics toolset.
- Access and run reports across multiple channels: Email, Mobile, and Social.
- Are available in all accounts.
- Contain layout and information defined by the Marketing Cloud.
- Define report parameters.

Create Report

Report Source:	Conversion Event Tracking Report
Report Parameters	
Date Range:	Last 24 Hours
Select Campaign to Report Against:	Abandoned Cart Program
Exclude Jobs Where Tracking is Suppressed:	True
Time Zone:	(GMT-04:00) Eastern Time (US & Canada)
Date Format:	English (United States)

* Corrects for Daylight Savings Time.

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Marketing Cloud Report Types



Report Type	Description
CloudPages	Access the data you collect from Smart Capture forms using the CloudPages Data Extension on any CloudPages Landing Page, Microsite, Facebook Tab, or MobilePush Page.
Contacts	Learn the total number of billable contacts in your account or data about an individual contact.
Email	Review email performance by device or attribute, examine email success in specific campaigns, discover what day is the best performing send day, get statistics on impression tracking, and much more.
Journey Builder	See tracking and engagement metrics for emails sent in journeys, aggregated by day or a specified period of time.
Mobile	Get the total number of subscribers and unsubscribes for SMS, tracking information about SMS messages, and keyword activity summaries. Run reports for push message tracking results. Review a summary of outbound messages sent to LINE followers, including the delivered message count.

21

Helpful Marketing Cloud Reports



Account Send Summary

- This report shows total send and response data for your account.

Campaign Email Tracking

- The Campaign Email Track report shows send tracking data for a specific campaign.

Single Email Performance by Device

- The Single Email Performance by Device report displays email performance on mobile devices versus desktop devices.

Spam Complaints Over Time

- This report provides historical data on the level of spam complaints received.

Contacts Counts

- The Contacts Counts report contains information on the total number of contacts in an account.

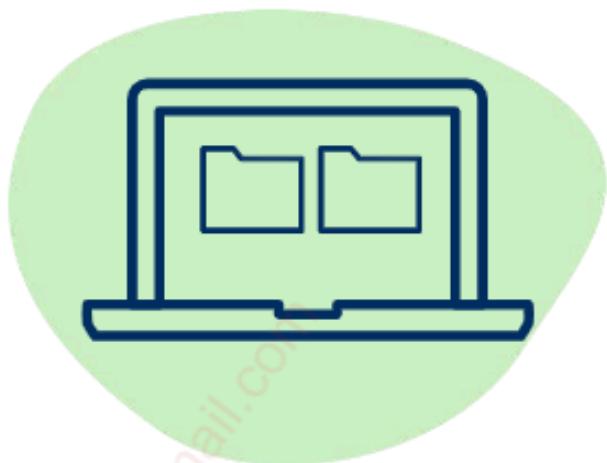
22

Journey Builder Reports



Journey Builder Email Send Summary

Create this report in The Reports tool to view tracking and engagement metrics for emails sent in journeys over a specified time frame. Choose specific journeys and versions to include in the report.



Journey Builder Email Sends by Day

Create the Journey Builder Email Sends by Day report to view tracking and engagement metrics for emails sent in journeys, aggregated by day, for a specified time frame, along with specific journeys and versions to include in the report.

23

Delivering Report Results



Email Report



FTP



Download



Snapshot



Schedule

- | | | | | |
|---|---|--|---|---|
| <ul style="list-style-type: none">Reports emailed to one or more addresses. | <ul style="list-style-type: none">Save report to Marketing Cloud FTP.Report saved in reports folder. | <ul style="list-style-type: none">Save to computer's hard drive. | <ul style="list-style-type: none">Saves report metrics in common workspace.Useful for collaboration. | <ul style="list-style-type: none">Establish a recurring schedule.Report can be emailed, placed on FTP, or saved as a Snapshot. |
|---|---|--|---|---|

24

Watch Me



7-2: Tour Reports

Goal:

Learn how to use the Reports tool.



25

Instructions:

1. Navigate to Reports under Analytics Builder.
2. Tour the Report workspace.

Contact Reporting



“For billing purposes, we want to keep up to date with how many Contacts are in our account. Can you pull the last 2 weeks of contact data?”



26

Join Me



7-3: Create and Deliver a Standard Report

Goal:

Explore Analytics Builder to learn about standard reports and how to deliver them.



27

Instructions:

1. Launch the Trailhead Simulator.
2. Run the Standard Report Contacts Counts.
3. View the Results.
4. Save the Report Definition.
5. Email the report.

Reports and Analytics



“Can you find the Account Send Summary for the last week and let me know what recommendations you have based on the numbers?”



Isabelle
Manager of
Digital Marketing

onto

28

Your Turn



7-4: Analyze the Account Send Summary

Goal:

Analyze the Account Send Summary report and make recommendations.



29

Instructions:

1. Analyze the report numbers.
2. Pay close attention to the key metrics discussed in class.
3. Record 1-2 observations about what you would keep doing, what you would change, or what you would stop doing.
4. Be prepared to share.

7-4: Analyze the Account Send Summary



Job ID	Email Name	Sends	Implicit Deliveries	Overall Bounces	Hard Bounces	Job ID	Soft Bounces	Block Bounces	Technical Bounces
86509	Welcome Step 1	136,199	136,181	18	11	86509	3	3	0
86514	Welcome Step 2	125,572	125,545	27	21	86514	2	1	3
86505	Re-engagement	158	124	34	0	86505	0	0	34
86494	Flash Sale	3,997	2,137	1,860	0	86494	0	0	1860
86472	Welcome Email	4,748	4,748	0	0	86472	0	0	0

Job ID	Unknown Bounces	Unique Opens	Cumulative Opens	Open Rate	Unique Clicks	Click Rate	Unique Complaints	Unique Unsubscribes
86509	0	11,215	11,251	8.933%	1,258	1.00%	0	1
86514	1	11,170	11,211	8.202%	1,164	.855%	0	0
86505	0	26	26	20.98%	15	12.1%	4	10
86494	0	1006	1212	47.08%	63	2.95%	0	0
86472	0	115	115	2.422%	19	.4%	1	1

Reporting Tips



- When you set a custom date range, the system generates a report based on data as it appears at 12:00 AM on that date. To include data from the end date, set the end date parameter to the following day.
 - For example, if you want to include data from May 1 through the end of the day on May 17, set May 18 as the end date.
- Shorter data ranges for reporting parameters are recommended.
- The report stops running if it's active for more than 3 hours.

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Reporting Tips, Cont.



- Where noted, some reports are not available to view as a web page and require you to select a format for file export.
- Larger reports that you can't view as a web page must be delivered by email or sent to FTP.
- Reporting capabilities are only available on standard data extensions that are a core part of the Marketing Cloud.

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Other Analytics Tools



Google Analytics 360

Integrate seamlessly across Salesforce Marketing Cloud and Google Analytics 360.

With GA360 for Marketing Cloud, you can:

- Connect marketing channel, web and advertising data, and analytics.
- Go beyond open rate and click rate and learn what content resonates (or doesn't) with your customers.
- View metrics from Journey Builder Dashboard.

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Intelligence

AI-powered marketing intelligence and analytics platform

With Intelligence, you can:

- Connect and unify your marketing data across Marketing Cloud and any other technologies in one centralized platform—with clicks, not code.
- Analyze and report across channels and campaigns so that every stakeholder in the organization has the right information at their fingertips.
- NEW! Intelligence can now be accessed from Marketing Cloud Analytics Builder.

Email Tracking: Troubleshooting



"It looks like we sent the flash sale email to 25,536 people, but the Data Extension has over 30,000 people. Can you look into this?"



34

How would you troubleshoot unsent emails?



- ✓ What can you look for on the account level?
- ✓ What can you look for in the Tracking Workspace?
- ✓ What can you look for at the Data Extension level?
- ✓ Is there anything else you can do to troubleshoot?

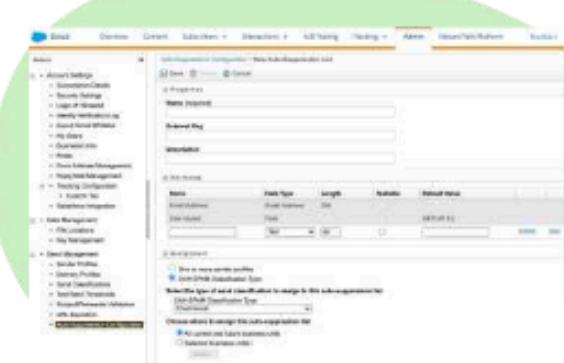
35



Troubleshooting Unsent Emails



- ✓ What can you look for on the account level?
- ✓ Is there an auto-suppression list configured?



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Troubleshooting Unsent Emails



- ✓ What can you look for in the Tracking Workspace?
- ✓ Who was the email sent to? Was there an exclusion or suppression list applied at send time?

The screenshot shows the 'My Tracking > Tracking Details' screen. It displays a summary for a specific tracking job. Key details shown include:

- Job ID: 3413
- Name: Abandon Cart Law Value
- Subject: Don't Forget! About Us
- Date Sent: 7/22/2020 2:19 PM
- Total Sent: 223
- Data Extension: NTOSubscribers (223) sent (Using All Subscribers)(223 sent)
- Excluded: NTORecentBounces (0 excluded)

A preview of the email message is visible on the right side of the interface.

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Troubleshooting Unsent Emails



- ✓ What can you look for at the Data Extension level?
- ✓ Is there a single email address attribute?

The screenshot shows the 'Fields' section of a data extension. The table lists various attributes and their properties. Two specific fields are highlighted with blue boxes:

- EmailAddress**: EmailAddress type, Length 255, Primary key, Nullable, Default value.
- Fax**: Text type, Length 255, Primary key, Nullable, Default value.

The table includes other columns such as Name, Data Type, Length, Primary Key, Nullable, and Default Value.

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Troubleshooting Unsent Emails



Q: Is there anything else you can do to troubleshoot?

A: Run a Tracking Extract with the NotSent Output selected.

The screenshot shows the 'Edit Data Extract Activity' screen in the Automation Studio. On the left, there's a sidebar with 'Active Jobs' and a list of 'Recent'. In the center, there are sections for 'Activity Range' (set to 'Last 7 Days'), 'Output Type' (set to 'Extract'), 'Document Content' (set to 'Default'), and 'X-Road ID Selection Method' (set to 'None'). On the right, there's a large list of extract options. One option, 'NotSent' under the 'Email' category, is highlighted with a blue box.

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Journey Builder: Troubleshooting



"Contacts are not entering the journey that I activated.
Can you help me troubleshoot?"



40

How would you troubleshoot journey entry errors?



Q: What can you look for in the Journey Entry Source?

Q: What can you look for in the Journey Settings?

Q: Where can you see a Contact's status with a Journey?

Q: Is there anything else you can do to troubleshoot?

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How would you troubleshoot journey entry errors?



Q: What can you look for in the Journey Entry Source?

A: What is the Entry criteria? Do they meet the Criteria? What is the schedule? Can they be injected based on the schedule?

The screenshot shows the 'Journey Entry Source' configuration page. On the left, there's a sidebar with 'Summary', 'Receiving Schedule', and 'Contact Evaluation'. The main area is titled 'Contact Evaluation' with the sub-instruction 'Choose the second best Journey Evaluation method to evaluate contacts'. It contains two sections: 'Evaluate all records' and 'Evaluate new records only'. The 'Evaluate all records' section has a note about it being a resource-intensive process. The 'Evaluate new records only' section has a note about it being faster. At the bottom, there are buttons for 'Cancel' and 'Save'.

42

How would you troubleshoot journey entry errors?



Q: What can you look for in the Journey Settings?

A: What is the re-entry setting? Can they be injected based on the re-entry settings?

NTO Abandon Cart Settings
Version 1
SETTINGS 2016

Contact Entry ⓘ
Select contact to entry mode:
• No re-entry
• Re-enter anytime
• Re-enter only after exiting

Default Email Address ⓘ
• Use email attribute from Entry Source
• Use email attribute from Contact
Add...

Default Mobile Number ⓘ
• Use phone number attribute from Entry Source
• Use mobile number attribute from Contact

43

How would you troubleshoot journey entry errors?



Q: Is there anything else you can do to troubleshoot?

A: How is the entry source data extension built? Does it have a single email address attribute? What is the status in All Subscribers?

Fields					
Name	Data Type	Length	Primary Key	Nullable	Default Value
EmailAddress	EmailAddress	254	<input type="checkbox"/>	<input type="checkbox"/>	
CustomerNumber	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
FirstName	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
LastName	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
Email	EmailAddress	254	<input type="checkbox"/>	<input type="checkbox"/>	
Address2	Text	40	<input type="checkbox"/>	<input type="checkbox"/>	
City	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
Country	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
MobilePhone	Phone	50	<input type="checkbox"/>	<input type="checkbox"/>	

All Subscribers		
Contains all subscribers		
<input checked="" type="checkbox"/> Available		
<input type="checkbox"/> Properties		
Search		
<input type="checkbox"/> Email Address	Status	
<input type="checkbox"/> ecato.10542.0697@gmail.com	Active	
<input type="checkbox"/> mthmee.10542.0698@hotmail.com	Active	
<input type="checkbox"/> mcowen.10542.0699@hotmail.com	Active	
<input type="checkbox"/> eavila.10542.0700@yahoo.com	Unsubscribed	
<input type="checkbox"/> okellher.10542.0701@yahoo.com	Active	

44

How would you troubleshoot journey entry errors?



Q: Where can you see a Contact's status with a Journey?

A: What does Journey History tell you about this contact? What does the Contact Path tell you?

ID	Start Date	End Date	Entry Type	Segment	Time
24,220 records • Last 30 Days					
514967487	2023-01-23	2023-01-23	Entered	Other	08:52:28Z 2023 11:40 AM
555592133	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
517293819	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
250996179	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
517905558	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
233300008	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
511526145	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
384196135	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
341970891	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM
26079332	Abandoned Cart Interaction	Other	Entered - Abandoned Criteria	Other	08:52:28Z 2023 11:40 AM



45

Contact Counts: Troubleshooting



"This report shows that we have about 17M contacts, but we have that many email subscribers alone."

Why are these numbers so different?"



onto

Ralph
VP of Marketing

46

How would you troubleshoot contact counts?



Q: What can you look for on the account level?

Q: What can you look for in Contact Builder?

Q: Is there anything else you can do to troubleshoot?

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Troubleshooting Contact Counts



Q: What can you look for on the account level?

A: What channels do you send to? Do you have a potential for overlapping contacts in different channels? Or duplicates?



48

Troubleshooting Contact Counts



Q: What can you look for in Contact Builder?

A: What are the Channel counts in All Contacts for each channel?

49

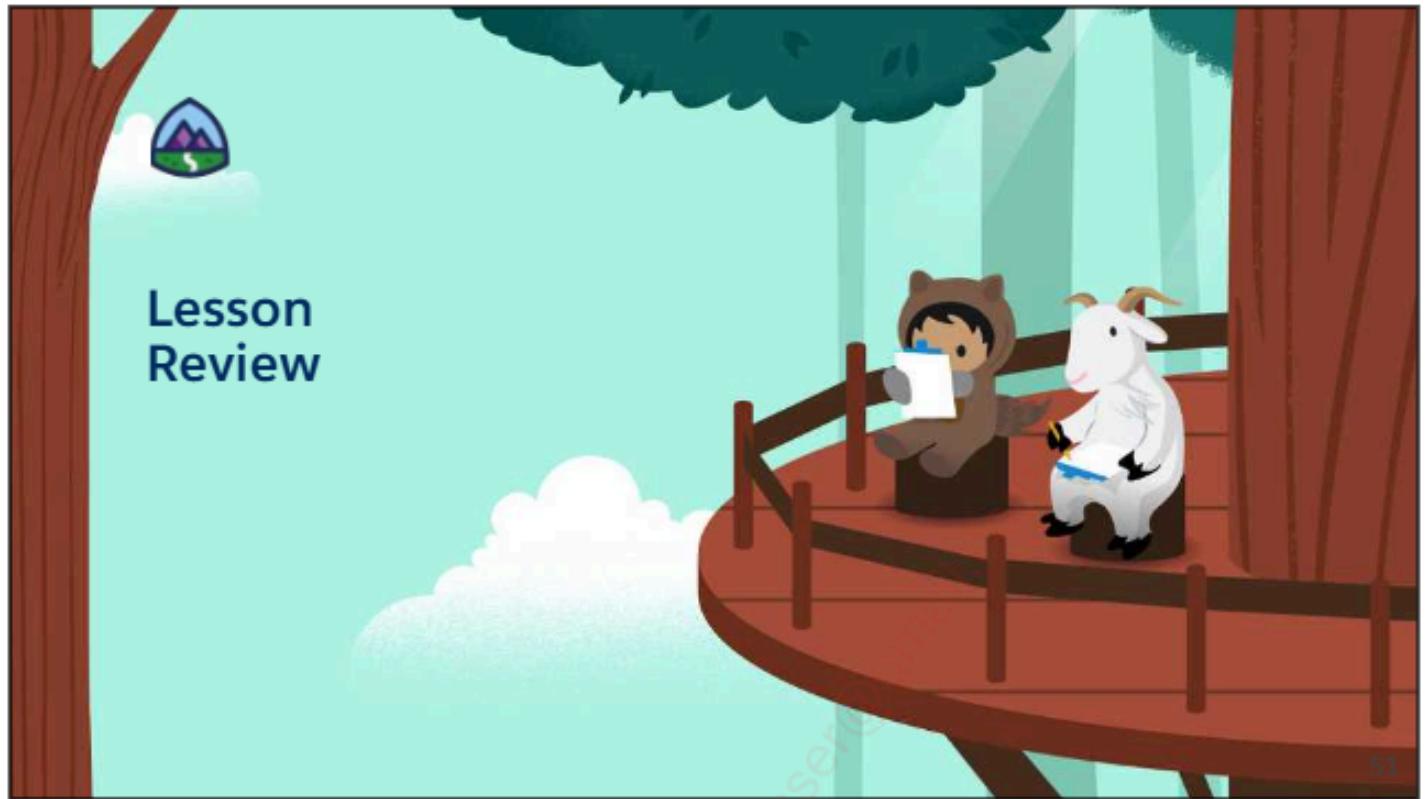
Troubleshooting Contact Counts



Q: Is there anything else you can do to troubleshoot?

A: Are you using Marketing Cloud Connect? How many Contacts/Leads are synced from Salesforce CRM?

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Lesson Review

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Lesson Review



Question 1:

A Marketing Specialist needs to deliver a report to a manager.

Which option(s) are available to schedule the reports?

A: Email

B: Snapshot

C: FTP



D: All of the above

Lesson Review



Question 2:

Northern Trail Outfitters has an active journey that is rejecting contacts.

Where should the Marketing Specialist start in order to troubleshoot?

A: Contact Builder

B: Email Validation

C: Journey History

D: Sender Profile



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Lesson Review



Question 3:

What report gives a marketer a total send and response data for email sends over a period of time?

A: Recent Campaign Sending Summary

B: Account Send Summary

C: Deliverability by Domain

D: Contact Counts



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Lesson 7: Hit the Trails!



Trail:

[Measure Your Marketing Impact](#)

Modules:

[Run Reports and Track Results](#)

[Intelligence Reports for Marketing Cloud](#)



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Analytics and Troubleshooting: Helpful Resource Links



Email Studio Reports in Analytics Builder

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

Journey Builder Reports in Analytics Builder

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

Best Practices for Data Extensions and Query Activities

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

Optimize Journey Builder Performance

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

Contact Builder Best Practices

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

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Next
Lesson

