



Abandon Cart Low Value Email



75

Your Turn



4-12: Create Abandon Cart Low Value Email

Goal:

Create the Abandon Cart Low Value Email for the Abandon Cart Campaign.



76

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 Creation: High Cart Value



“Isabelle asked me to write some AMPscript for the High Cart Value email. Can you add this to the email?”



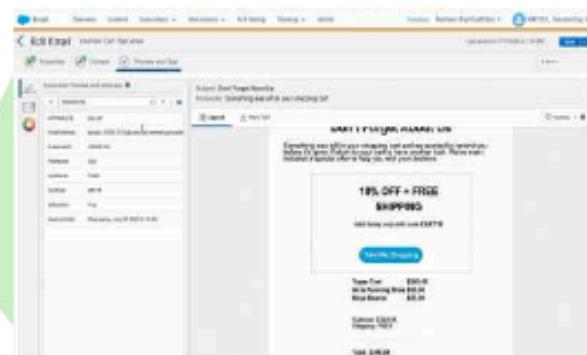
77

Advanced Personalization with AMPscript



For High Value Carts, NTO wants to dynamically display the items in each cart.

This requires AMPscript because the data is in a separate data extension and each cart item is a separate row of data.



78

AMPscript: NTO's Abandon Cart High Value Email



NTO wants to use AMPscript to display details about the items left in the high value carts to further personalize the email message:

```
1 %%[SET @prodRows=LOOKUPROWS('NTOCartInfo','CustomerId',@CustomerId)
2 IF ROWCOUNT(@prodRows) > 0 THEN
3 FOR @i = 1 TO ROWCOUNT(@prodRows) DO
4   SET @prodRow = ROW(@prodRows,@i)
5   SET @productName = FIELD(@prodRow, 'ProductName')
6   SET @productPrice = FIELD(@prodRow, 'UnitPrice')]%%
7 <b>%=%v(@productName)=%%</b>
8 <b>%=%FormatCurrency(@productPrice,"en-US",2)=%%</b>
9 %%[NEXT @i]%%
```

79

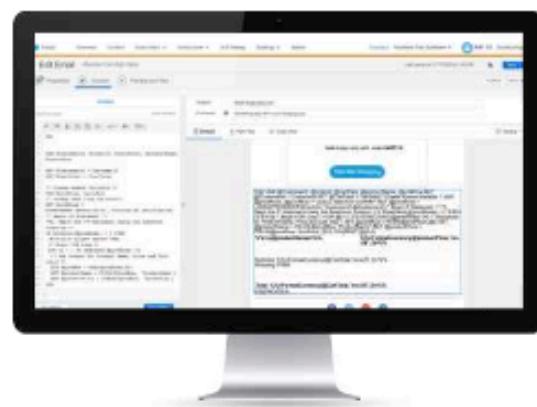
Content Blocks: Code Snippet



Use code snippets in Content Builder to save reusable bits of HTML, CSS and AMPscript.

Code snippets behave like other content blocks, but they are different because they do not include any added HTML.

All other blocks in Marketing Cloud include an extra HTML table that wraps the content.



80

Join Me



4-13: Create Abandon Cart High Value Email

Goal:

Create the Abandon Cart High Value Email for the Abandon Cart Campaign.

Instructions:

1. Duplicate the Abandon Cart Low Value Email.
2. Add a Code Snippet Content Block.



81

Your Turn

Brainstorm a Birthday Email



10 mins.



Activity

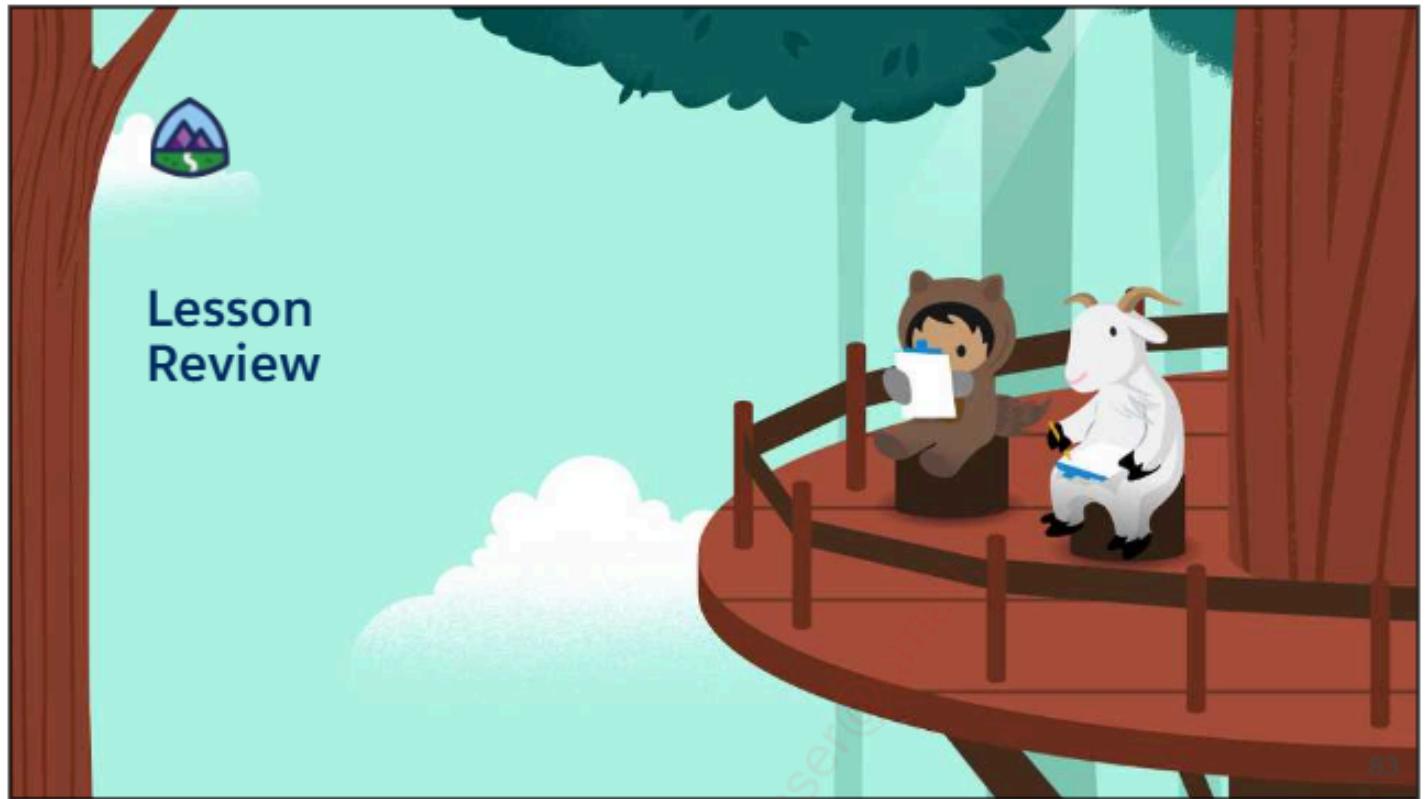
Create an Email

NTO wants to implement a birthday campaign.

Brainstorm what you need to create the email, including:

- Subject Line
- Preheader
- Call to Action
- Personalization

82



Lesson Review

83

Lesson Review



Question 1:

In which areas can personalization strings be used to customize an email?

A: Subject Line

B: Email Name

C: Preheader

D: Email Body

Lesson Review



Question 2:

What functionality allows you to send specific content to a subscriber based on attribute data?

A: Personalization Strings

B: Dynamic Content

C: Data Filters

D: Profile Attributes



Lesson Review



Question 3:

How can a new marketer at NTO create a mobile responsive template for an upcoming email campaign without writing HTML/CSS?

A: Utilize a Marketing Cloud provided basic template

B: Choose from a Marketing Cloud provided theme template

C: Utilize a Marketing Cloud provided empty template

D: All of the above



Lesson Review



Question 4:

When testing an email, a marketer at NTO is seeing first names of subscribers showing up in all capital letters.

What can be added to ensure proper capitalization is applied to the subscriber's first name?

A: The AMPscript Lowercase function

B: The AMPscript Uppercase Function

C: The AMPscript ProperCase Function

D: The AMPscript Capitalization Function

88

Lesson 4: Hit the Trails!



Trail:

[Create Compelling Content with Content Builder](#)

Modules:

[Craft Effective Marketing Emails](#)

[Marketing Content Creation](#)

[Content Builder Basics](#)

[Content Builder Features](#)

[AMPscript for Non-Developers](#)

[Personalized Email Marketing](#)



89

Email Message Design and Creation: Helpful Resource Links



Content Builder Support File Types

https://help.salesforce.com/articleView?id=mc_ceb_supported_file_types.htm&type=0

Personalization Strings in Email Studio

https://help.salesforce.com/s/articleView?language=en_US&id=sf.mc_es_available_personalization_strings.htm&type=5

Email Client Support for Default Templates

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

Email Design Toolkit

https://www.salesforce.com/products/marketing-cloud/resources/email-design-toolkit/?mc_marketingcloud.com/products/email-marketing/email-design-toolki





Lesson 5

Message Testing, Delivery, and Email Marketing Best Practices



1

Course Roadmap

2

LESSON 1:
Intro
to the MC

LESSON 5:
Testing,
Delivery, &
Best
Practices

LESSON 2:
Administration
Essentials

LESSON 4:
Email Message
Design & Creation

LESSON 3:
Data
Management

LESSON 6:
Marketing
Automation

LESSON 7:
Analytics &
Troubleshooting

LESSON 8:
Course Wrap

Congrats!



Lesson Objectives

By the end of this lesson, you will:

- Learn about testing for email messages.
- Understand how to ensure that your emails are compliant and delivered successfully.

3



Message Testing, Delivery, and Email Marketing Best Practices

Lesson Topics

1. Prioritize testing methods and tools to ensure quality control.
2. Send an email manually using Send Flow.
3. Define subscriber statuses, unsubscribe methods, and preferences.
4. Explain compliance concepts to ensure optimal deliverability.

4



Testing Tools

"Before we start the Abandon Cart campaign, can you test the emails and make sure they render in the inbox? You may need to create test data. Be sure to add me to the tests."

5



Ensure the Accuracy with Testing

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

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

6

Testing tools available:

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



Content Detective



An Email message tool that helps you identify potential spam triggers in your email content.

- It mirrors logic used by spam-filtering software to identify words, phrases, and patterns that are likely to trigger filters.
- Content Detective finds potential problems and suggests solutions.
- It does not scan HTML code to make sure it is written correctly.
- Checks content written in English.



RESOURCE:

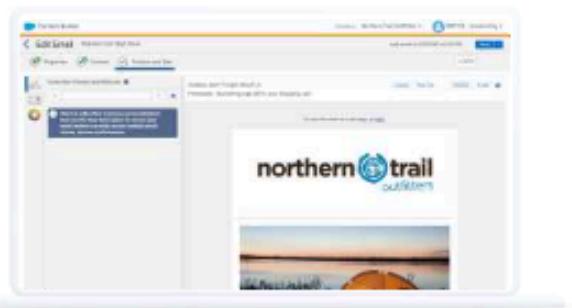
Search "Content Detective Trigger Words" on Salesforce Help for a list of words that prompt a warning from Content Detective.

7

Preview Your Email: Send Preview



- Allows you to preview your email before sending.
- Review both a static preview and subscriber-specific previews to check business logic and personalization.
- Toggle between Layout and Plain Text versions, as well as Desktop and Mobile views.
- Select a sendable data extension or All Subscribers to see subscriber-specific previews.
- Email Validation runs against the selected audience.



8

Email Validation



Email Validate checks your email message for common issues that could prevent your email from being sent. Validate your email and make corrections before starting any sending process.

Validate will confirm:

- Correct attribute syntax.
- Content and data being used for Dynamic Content rules are built correctly.
- AMPscript is properly written.
- Validates for required elements:
 - Unsubscribe link
 - Physical mailing address

9



Test Send Your Email

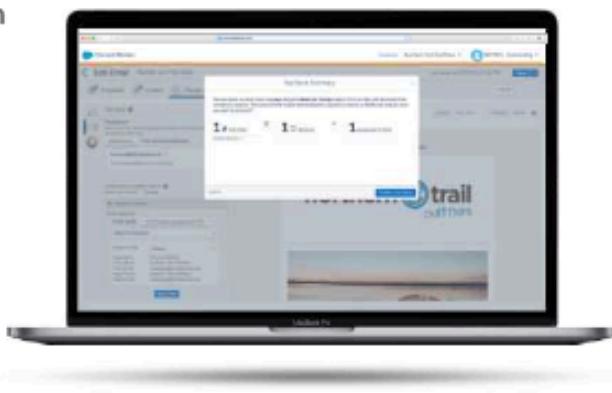


Test your email internally, before sending to a customer.

Add warnings to reduce risk of test sends sent in error as live sends.

Testing features include:

- Send a specific email version or multiple versions to up to 5 recipients to ensure personalization and business logic is set up correctly.
- Option to use a Test Data Extension for more than 5 dynamic previews.



Email Approvals



Stay in control of your email campaigns

Streamline your user experience to facilitate a distributed approval process that ensures emails are not changed and delivered without approval.

You can also:

- Quickly review and approve outgoing email company-wide.
- Keep communications consistent and on brand.
- Meet compliance requirements and improve deliverability.
- Communicate and track all revisions.
- Gain more administration flexibility with roles and teams.

11



Join Me



5-1: Create Test Data

Goal:

Create data for testing email sends.



12

Tasks:

1. Navigate to Contact Builder.
2. Duplicate the NTOSubscribers data extension and add test records.
3. Add yourself to the NTOSubscribers data extension.

Join Me



5-2: Test the Abandon Cart Emails

Goal:

Explore the Subscriber Preview to test rendering and send your email with the Test Send tool.



13

Tasks:

1. View the Subscriber Preview for the Abandon Cart Low Value Email.
2. Ensure email is rendering correctly with Subscriber Preview.
3. Send a Test Send to yourself.
4. Repeat for Abandon Cart High Value Email.

Your Turn



5-3: Test the Welcome Email

Goal:

Explore the Subscriber Preview to test rendering and send your email with the Test Send tool.



14

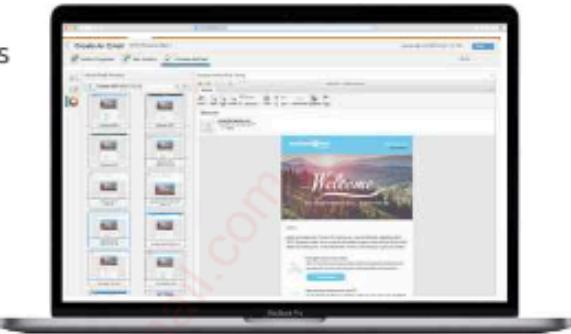
Tasks:

1. View the Subscriber Preview for the Welcome Email for NTOSubscribers.
2. Edit email content to add the ProperCase function.
3. Ensure email is rendering correctly with Subscriber Preview.
4. Send a Test Send to yourself.

Test More with Litmus Previews



- Litmus Email Previews lets you preview your email across 70+ browsers, devices, and clients.
- We use Litmus APIs so you can access previews of Marketing Cloud emails directly inside the email creation flow.
- This enables you to easily create, preview, and test Content Builder emails across multiple email clients.
- You must have a Litmus account to access this tool.
- Use the Top Domain Deliverability report to prioritize top subscriber domains for email rendering confidence.



15

Message Testing, Delivery, and Email Marketing Best Practices

Lesson Topics

1. Prioritize testing methods and tools to ensure quality control.
2. Send an email manually using Send Flow.
3. Define subscriber statuses, unsubscribe methods, and preferences.
4. Explain compliance concepts to ensure optimal deliverability.



16

Email Message Delivery: Send Flow



“Isabelle asked me to show you how to send the weekly newsletter.”

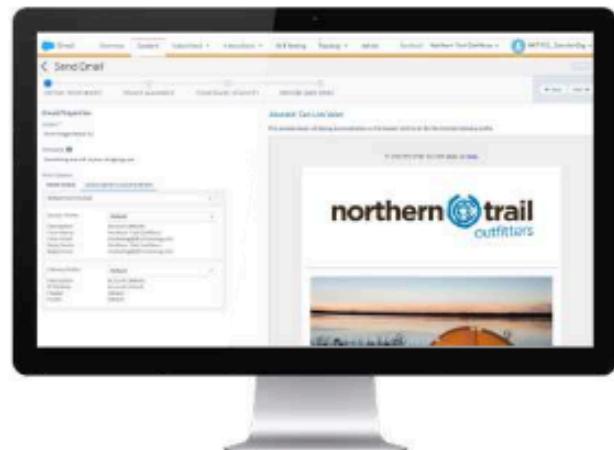


17

Email Send Flow



- Four Steps to Send:
 - Properties: Email, Subject Line, Send Classification
 - Audience: Target, Exclusion, Suppression
 - Delivery: Schedule, Send Throttling, Advanced Properties
 - Review: Check and correct errors before sending
- Subject and preheader validation: Warns users and prevents accidental live sends that contain test-related words in the subject and preheader.



18

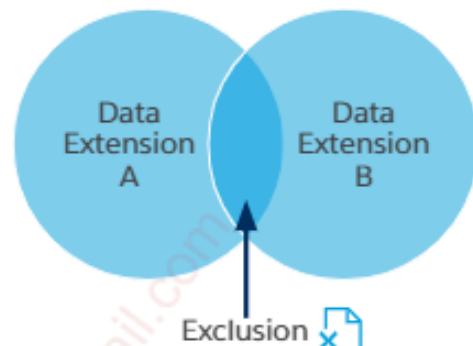
Preventing Sends: Exclusion Lists



Exclusion List

- To exclude a group of subscribers from an email send, use a Sendable Data Extension as an exclusion list.
- The system excludes using the subscriber key value.

A common use case: You send a newsletter to Data Extension A but later realize you want to send it to Data Extension B. Some of the subscribers on Data Extension A also exist on Data Extension B and you don't want to send them the same email twice. When you send to Data Extension B, you select Data Extension A as an exclusion list.



19

Preventing Sends: Suppression Lists



Suppression List

- A suppression list is a list of subscribers that you don't want to receive your communications.
- Suppression lists filter out email addresses and prevent those addresses from receiving your messages.
- Suppression lists serve as a "do not contact" list for your email sends.
- Examples include:
 - Addresses with a history of spam complaints
 - Unsubscribe lists from previous providers
 - Addresses of your competitors
 - Canceled customers.
- Assign an auto-suppression list to automatically prevent sends to selected contacts at send time.



20

Develop a Pre-Send Checklist



To help reduce sending errors, create a pre-send checklist. Some helpful items include:

- **Copyediting** – is the copy correct, are dates and times correct, are coupon percentages appropriate?
- **Links** – do they work? Do they go to the right place?
- **Send Classification** – What Send Classification are you using? Who is it from? Is it Commercial or Transactional?
- **Subject Line and Preheader** – Are they correct? Validate for testing words.
- **Test** - Send a test to yourself and your colleagues. Test as many dynamic content pieces within reason.



Develop a testing process that works best for you and your organization.
²¹

Canceling an Email Send



Can I cancel a send after I click the send button?

- You can cancel a send if it is still in pending status.
- If a send in progress is cancelled, some emails will be sent.
- Emails already sent cannot be recalled.



Join Me



5-4: Send the Weekly Newsletter Email

Goal:

Send an email using
Send Flow.



23

Tasks:

1. Navigate to NTO Newsletter Email.
2. Define Properties, Audience, Delivery options.
3. Send the NTO Newsletter Email.

Message Testing, Delivery, and Email Marketing Best Practices

Lesson Topics

1. Prioritize testing methods and tools to ensure quality control.
2. Send an email manually using Send Flow.
3. Define subscriber statuses, unsubscribe methods, and preferences.
4. Explain compliance concepts to ensure optimal deliverability.



24

Subscriber Statuses

“Now that you're sending, I want to review All Subscribers and subscriber statuses with you so that you can monitor unsubscribes and bounces for any potential issues.”

25



Isabelle
Manager of
Digital Marketing

What is All Subscribers?



Definition

Database of Record of Email subscriber records for the tenant.

Contains Email Address, Subscriber Key, Status, and any Profile or Preference attributes created in Email Studio.



26

All Subscribers Basics



- Subscribers are added to All Subscribers whenever they are sent an email via a Data Extension. You can also add subscribers directly to All Subscribers via an import.
- Any Subscriber in All Subscribers is also a Contact in All Contacts.
- Marketers can add additional attributes using Profile and Preference Attributes.



27

Profile and Preference Attributes



Profile Attributes

The profile attribute contains information to characterize a subscriber profile. For example, each subscriber is asked to provide their birth date, and email address.

Preference Attributes

A preference attribute characterizes how a subscriber prefers to receive email. These are specified boolean values. For example: The subscriber prefers to receive email as HTML.

NOTE:

When sending to data extensions, the sendable data extension attributes take priority over any custom Profile and Preference Attributes in All Subscribers.

28

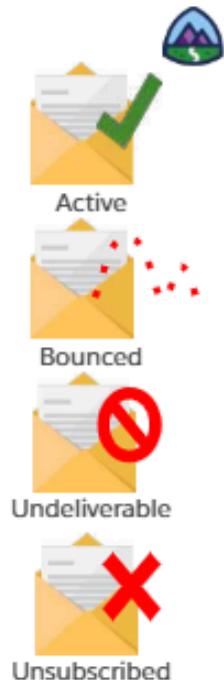
All Subscribers Statuses

Active: Active subscribers are available to receive email messages. Subscribers are given an active status at the time they are added to All Subscribers.

Bounced: Subscriber has one or more bounces, soft or hard.

Held (Undeliverable): Three or more bounces, soft or hard, and more than 15 days have passed since the first bounce.*

Unsubscribed: Subscriber has unsubscribed from all email communications or they have submitted a spam complaint from a mail service that provides a feedback loop to Salesforce. No commercial sends will be attempted. Transactional sends will still be sent.



*If bounce is from a trusted provider, only one hard bounce is required.

29

How are Subscribers Added to All Subscribers?



Subscribers can be added to All Subscribers through a variety of methods:

- Subscribers stored on data extensions join the All Subscribers list when you send your first message to that subscriber based on the **Send Relationship** in the Data Extension.
- You can directly import to All Subscribers – this is typically used for updates once a subscriber has already been added.
- Any Subscriber added to All Subscribers automatically becomes a Contact in All Contacts.
- Subscribers added to All Subscribers are run through List Detective at the time they are added.

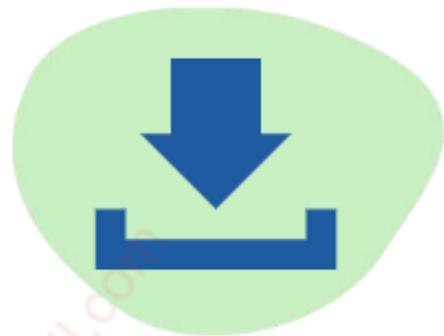


30

Send Relationship and All Subscribers



- When sending an email to a sendable data extension in Email Studio, the Marketing Cloud automatically sends to the email address stored in All Subscribers.
- This is default behavior and cannot be changed.
- This has an impact when a subscriber changes their email address.
- To ensure that you always have the most up to date email address in All Subscribers, import subscriber data to All Subscribers in addition to sendable data extensions.
- Create attributes for subscriber data that you want stored in All Subscribers.



31

All Subscribers Email Address Behavior & Data Extensions



Subscriber does not exist in All Subscribers:

The subscriber key is used to create a record in All Subscribers, and the email address from the data extension is used to populate the All Subscriber record's Email Address column. The send is delivered to this email address.

Subscriber exists in All Subscribers:

The send is delivered to the Email Address value in the All Subscribers record. The Email Address attribute in the target data extension will not be used to update the subscriber's record in All Subscribers.

This behavior applies to emails sent through Send Flow, User Initiated Emails, and Send Activities.



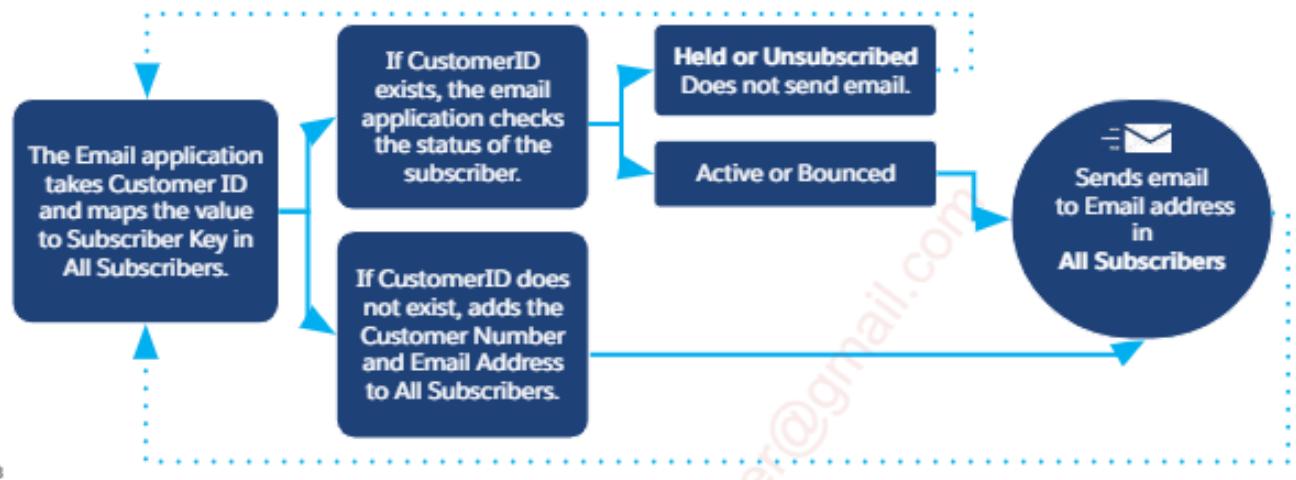
32

Send Relationship Scenario



Send Relationship:

CustomerID relates to Subscribers on SubscriberKey



33

Join Me



5-5: Tour All Subscribers

Goal:

Familiarize yourself with All Subscribers and what type of information gets stored there.



34

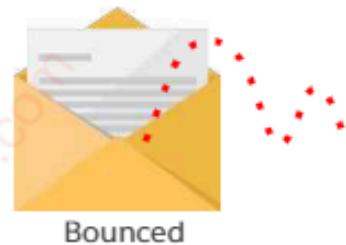
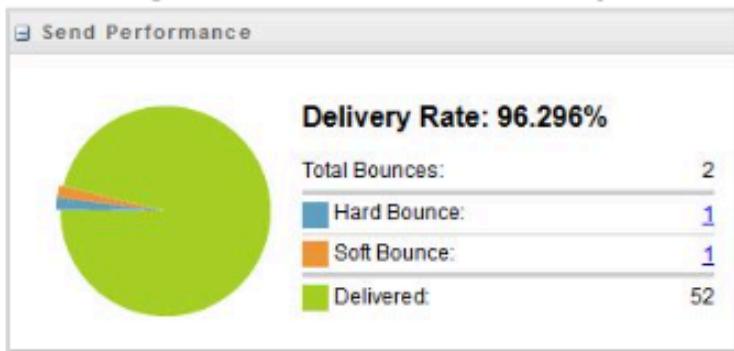
Tasks:

1. Navigate to All Subscribers.
2. Change sort order; expand viewed subscribers per page.
3. Explore the Properties and Tracking tabs.

Bounce Mail Management



- Automatic bounce handling and processing.
- Prevents sending to invalid addresses ad nauseam.
- Maximizes deliverability by protecting sender reputation.
- Tracking shows bounce information. Why did it bounce?



Four Primary Bounce Reasons



SOFT BOUNCE

Email server rejects mail due to a temporary condition.

HARD BOUNCE

Email server rejects the email due to permanent condition.

BLOCK BOUNCE

Email server rejects the email due to filter issues, authentication failures, spam or reputation issues.

TECHNICAL BOUNCE

Considered a type of soft bounce, email server rejects the email due to technical errors.

How does Bounce Mail Management Work?



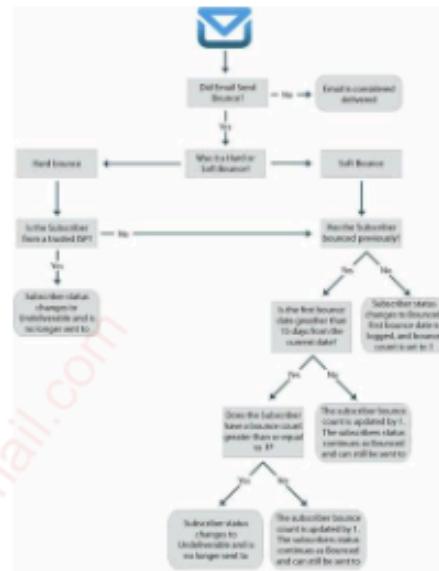
If the email returns a **soft bounce**:

- We will retry sending the email to the subscriber every 15 minutes for 72 hours (288 attempts) before changing status to "bounced".
- If it is the first soft bounce, the bounce count is set to 1. It is updated by 1 for every bounce up to 3 within a 15-day period.
- If the bounce count reaches 3, and it has been more than 15 days since the first bounce event, status is changed to Undeliverable.

If the email returns a **hard bounce**:

- If it is from a trusted domain, the status is changed to Undeliverable.
- If it is from an untrusted domain, it is treated the same as a soft bounce.

37



Ways to Unsubscribe



"We want to make sure that when someone unsubscribes from our welcome email, they still receive other commercial messages."



38

Types of Unsubscribes



Global Unsubscribe



Universal Unsubscribe



List-Level Unsubscribe

39

What is a Global Unsubscribe?



Definition

An event that occurs when a subscriber chooses to unsubscribe from every email sent from the Salesforce Marketing Cloud.



40

Global Unsubscribe



The Global Unsubscribe List is managed by Salesforce Marketing Cloud Support.

- A subscriber that exists on this list has requested not to receive any type of communication from any account, regardless of sender.
- None of our clients can email that subscriber.
- Most email addresses on this list are spam traps or spam complaints.
- Accounts can't add or import email addresses that appear on the global unsubscribe list to All Subscribers.



41

What is a Universal Unsubscribe?



Definition

When a subscriber chooses to unsubscribe from every email sent from your company.



42

Universal Unsubscribe



There are multiple ways for a subscriber to unsubscribe from all.

- Via the subscription center link on the email.
- The subscriber can click the Manage subscriptions link and then unsubscribe from all by checking the box.
- When a subscriber makes a spam complaint from an email provider with feedback loop to Salesforce, the subscriber will be unsubscribed in All Subscribers.



NOTE:

Depending on Account Settings, an unsubscribe request can be applied to the entire enterprise or only the business unit.



43

Default Profile and Subscription Centers



Marketing Cloud has default Profile and Subscription Centers that work with the Legacy List data model. New customers will build custom Profile and Subscription Centers.

The **profile center** is a webpage where subscribers can enter and maintain the personal information that you keep about them.

- By default, every email that you send contains a link to the Profile Center for subscribers to use.
- In the Profile Center, subscribers see the Profile Attributes that are defined in your account that you don't mark as hidden.
- In compliance with CAN-SPAM laws, every Profile Center page includes a universal opt-out option.

A **subscription center** is a web page where a subscriber can control the messages they receive from your organization.

- The lists you identify as public in the application are available for a subscriber to opt in to on the subscription center.
- Only lists you would like subscriber to be able to opt-in or opt-out of should be marked as public.
- Data Extensions cannot appear on the subscription center by default.

44

Universal Unsubscribe: How Does It Work?



NTO sends a newsletter to subscribers on a sendable data extension.



A Subscriber receives an email.

Subscriber unsubscribes from the email via the subscription center.

Unsubscribe from all publications

Subscriber is unsubscribed from All Subscribers.

Email Address	Status
jones@gmail.com	Active
joe@joesworld.com	Unsubscribed

What does this mean?

The subscriber will not receive another commercial email from NTO regardless of the filter, data extension, etc. that it is sent to. The subscriber has been unsubscribed from all communications from NTO.

45

What is a List-Level Unsubscribe?



Definition

A **list unsubscribe** occurs when a user unsubscribes from a list only. For example, if a user unsubscribes from your Monthly Newsletter, they remain on any other email lists under which they exist. There are several ways a user can unsubscribe from a list.



46

What is a Publication List?



Definition

A list in Email Studio that helps manage **subscriber status** when sending emails to sendable data extensions.



47

List-Level Unsubscribe



There are several ways for a subscriber to unsubscribe from a specific type of communication using default links.

- When an email is sent to a subscriber in the footer of the email will be a link to the default Subscription Center.
- When a subscriber clicks on the link to the Subscription Center, the subscriber then can choose to opt in or opt out of any lists or publication lists marked as Public.
- The One-Click Unsubscribe will unsubscribe a subscriber from the specific list or publication list and redirect the subscriber to the Subscription Center, where they can choose to unsubscribe from additional campaigns.



48



List-Level Unsubscribe: How Does It Work?

NTO sends an email to subscribers on sendable data extension with a publication list associated.



A Subscriber receives email.

The Subscriber unsubscribes from the email.

Unsubscribe

The Subscriber is unsubscribed from the publication list.

Email Address	Status
jjones@gmail.com	Active
jill@jillsworld.com	Unsubscribed

What does this mean?

The Subscriber will not receive another commercial email from NTO when the Publication List is associated with the send. This includes any segments associated with the Publication List.

49

Publication Lists



- Publication lists are associated to an Email Send to a sendable data extension (during send configuration).
- Subscribers are added to the publication list at send time, similar to All Subscribers.
- When a subscriber performs a list-level unsubscribe, the publication list is updated, while the subscriber status stays active in All Subscribers.
- You cannot send directly to a publication list.
- Typically used for types of sends, like campaigns (ex: Welcome Emails).

Email Address	Subscriber Key	Status	Added Date	Add Method
joe@joesworld.com	19869	Active	1/23/2020	Data Extension
jill@jillsworld.com	28267	Active	1/24/2020	Data Extension
john@johnsworld.com	45356	Unsubscribed	4/22/2021	Data Extension

50

Join Me



5-6: Create a Publication List

Goal:

Create a publication list for Welcome campaign emails.



Tasks:

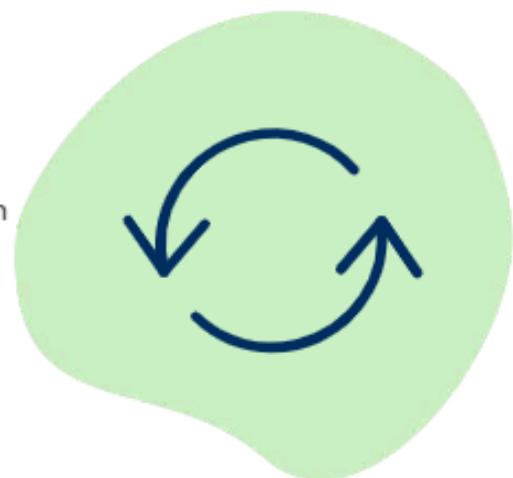
1. Navigate to Subscribers in Email Studio.
2. Create a publication list with a unique name for Welcome campaign emails.

Re-Subscribing



After unsubscribing from a publication list or All Subscribers, a subscriber can be manually re-subscribed in two ways.

1. Manually change the subscriber's status in the system by searching for the subscriber in All Subscribers and changing their status with the Activate button.
2. Import a file to All Subscribers. The file must have a status column with the value of active.



Scenario 1: What's my Status in All Subscribers?



An email message is sent to an email domain of a trusted service provider. The feedback loop returns a hard bounce.



Status: Held (Undeliverable)

53



Scenario 2: What's my Status in All Subscribers?



A subscriber clicks the unsubscribe button on an email sent from a sendable data extension.



Unsubscribe



Status: Unsubscribed

54



Scenario 3: What's my Status in All Subscribers?



A subscriber is sent an email for the first time from a Data Extension.



Status: Active

55



Scenario 4: What's my Status in All Subscribers?



August

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					

56

Three different soft bounce events from August 18 to August 23.

Status: Bounced

Scenario 5: What's my Status in All Subscribers?



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					

Three hard bounce events from an untrusted domain from August 5 to August 23.

Status:
Undeliverable

57

Message Testing, Delivery, and Email Marketing Best Practices

Lesson Topics

1. Prioritize testing methods and tools to ensure quality control.
2. Send an email manually using Send Flow.
3. Define subscriber statuses, unsubscribe methods, and preferences.
4. Explain compliance concepts to ensure optimal deliverability.



58

Marketing Best Practices: Deliverability



“One of our most important values is customer trust. Can you ensure our emails are compliant, and using industry best practices?”



Ralph
VP of Marketing

59

Compliance Is Not Optional



- Marketing Cloud automatically checks for some elements required by United States Federal CAN-SPAM legislation when sending.
 - Physical Mailing Address
 - Mechanism to Unsubscribe
- Comprehensive laws have been enacted in the European Union, United States, and other regions.
- Laws of a region usually apply to any organization that offers goods or services or tracks behavior of people in the region, whether or not that organization has a physical presence in the region.



Ultimately, you are responsible for complying with local laws and regulations, wherever you send email messages.

60

Email Studio Compliance Features



Three new Email Studio setup options that allows admin to verify compliance settings.

1. Profile Link Check
2. Physical Address Check
3. Unsubscribe Link Check

The screenshot shows the 'Email Optional Features' section in the Salesforce Setup. It contains three toggle switches:

- Profile Link Check:** Toggled off (gray). Description: Turning this feature off removes the requirement for the Profile Center link when validating and sending emails. Ensure your emails meet local regulatory requirements before disabling this feature. [Learn More](#)
- Physical Address Check:** Toggled off (gray). Description: Turning this feature off removes the requirement for a physical mailing address when validating and sending emails. Ensure your emails meet local regulatory requirements before disabling this feature. [Learn More](#)
- Unsubscribe Link Check:** Toggled on (blue). Description: Turning this feature off removes the requirement for the unsubscribe link when validating and sending emails. Ensure your emails meet local regulatory requirements before disabling this feature. [Learn More](#)



61

Data Privacy & Protection Resources



[SALESFORCE DATA PRIVACY OVERVIEW](#)

[SALESFORCE PRIVACY INFO BY REGION](#)

[TRAIL ON PRIVACY AND DATA PROTECTION LAW \(EU & US\)](#)

[CONSENT MANAGEMENT FOR THE SALESFORCE PLATFORM](#)

[STORE CUSTOMER DATA PRIVACY PREFERENCES](#)



62

iOS Mail Privacy Protection & Hide My Email



With the introduction of iOS 15 & macOS Monterey, Apple Mail users will have the ability to block by IP address, location data, device details, deliverability and email opens on iPhone, iPad and Mac.

What does this mean for email marketers?

- Expect open rates to become skewed
- Expect ISPs to revisit deliverability algorithms
- Expect email marketing programs to become closely scrutinized



G3 *Apple Mail accounts for 38.9% of email client market share, and 46% of all email opens according to Litmus.

EU's General Data Protection Regulation



- The GDPR is an expansive regulation focused on the data privacy rights of individuals, which identifies expanded control over personal information.
- Applicable to EU companies and non-EU companies interacting with EU data subjects.
- To help prepare, Salesforce has a website containing cloud-specific readiness approaches and best practices.
<https://www.salesforce.com/gdpr/overview/>
- Take the European Privacy Laws Basics module on Trailhead.
<https://trailhead.salesforce.com/modules/european-union-privacy-law-basics>



GDPR and Marketing Cloud



Contact Delete

- Deletes data associated with a Contact Key across all sendable data extensions, All Subscribers, and All Contacts.

Restrict Data Processing

- Prevents a contact from being sent to or tracked by Marketing Cloud.

Do Not Track

- Do Not Track functionality is designed to honor the subscriber's request to suppress email opens and clicks from emails sends.

Track Clicks

- The marketer can choose whether to track subscriber clicks during an email send or not.

65



Understanding Email Deliverability



Email Deliverability is simply a way to measure the success at which as a sender, you are able to deliver mail to your customers, and avoid all the issues that can cause mail not to be delivered.

- Email Deliverability encompasses all the complexities involved with delivering your email to the intended recipients.
- Deliverability is not the same as the Delivery Rate.
- Factors like content, authentication, infrastructure, list quality, subscriber engagement, spam filters, and more contribute to deliverability.



Email Deliverability and Sender Reputation



Mailbox providers collect data about clients' mailing practices to determine if they are a good or bad sender.

They use this data to decide which mail is sent to the inbox and spam folder, or rejected.

It's estimated that 20% of commercial, permissioned email messages never reach the inbox.

To increase your chances of reaching the inbox, you must have a solid understanding of what affects your deliverability.



NOTE:

Sender Reputation often determines inbox placement.

67

Sender Reputation: Key Players



Complaints

Complaints are the most important explicit action from your end users, and they influence your reputation. This is the strongest signal that your end users do not like or want the mail you send.

List Hygiene

List Hygiene is all about the validity and health of your subscriber data. There are 3 groups that negatively impact your list hygiene:

- Unknown Users
- Spam Traps
- Inactive Users

Authentication

Authentication is easy yet crucial in signing your mail properly to establish and prove who you are as a sender.

Spam Traps

Spam traps are legitimate addresses whose sole purpose is to catch the bad actors who are sending to inactive users or unconfirmed opt-ins. Spam Traps are operated by ISPs.

Permission

Permission is the most important email best practice. While simple, it is the cornerstone of building a positive reputation.

Frequency

Email frequency is one of the primary reasons why people may unsubscribe or opt-down the amount of email they receive.

Content

Content, by itself, typically isn't a problem regarding reputation. The reaction – or lack thereof – to content influences reputation more.

Engagement

Engagement is most commonly associated with opens and clicks, but it can also include other explicit actions that marketers can't easily see.

68

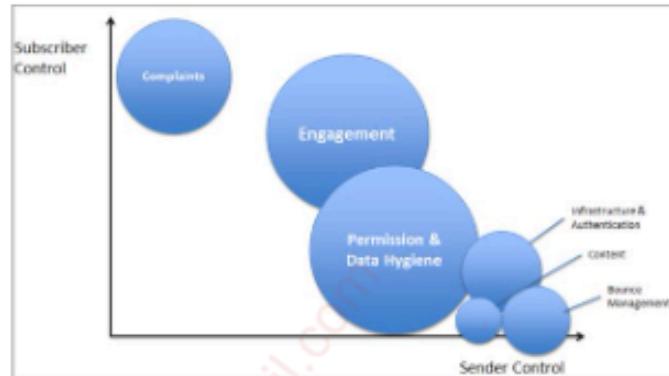
The Reputation Equation



Permission and Authentication - Get the basics right

Content & List Hygiene - Influential drivers for deliverability

Ongoing Engagement Monitoring - Separates the great from the good



69

Permission-Based Marketing Policy



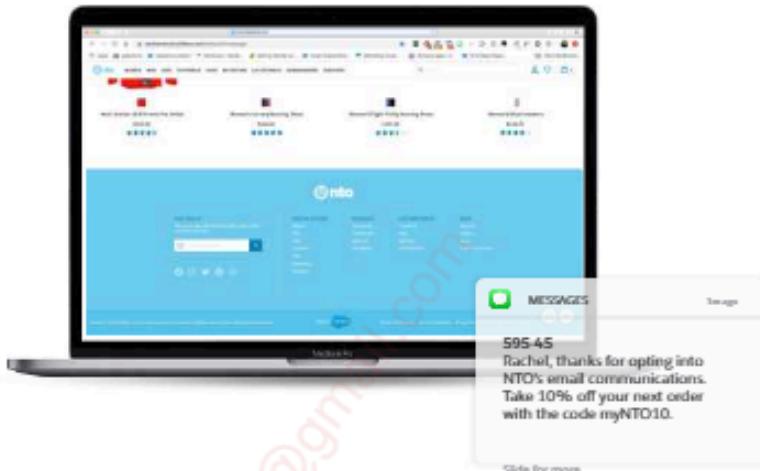
- Salesforce Marketing Cloud cannot be used to send unsolicited bulk emails. This is defined as email sent to individuals with whom you do not have a prior business relationship.
- By building and using an "opt-in" subscriber list with a double opt-in process, users can be certain that they are sending emails to recipients that have expressly given their permission to do so.
- Ensuring that all new sign ups explicitly opt-in to your mail program, and setting clear expectations on what they are opting into is the single most important best practice with email

70

Subscriber Acquisition Methods



- Website Signup
 - Pop ups or Form
 - Single Opt In versus Double Opt In
- Social Channels
- Mobile opt-in
- Stores
- Customer Service
- Tradeshows/Events



71

Authentication



Authentication is mostly handled by Salesforce Marketing Cloud, unless you are self-hosting DNS.

All clients who purchase the Sender Authentication Package have all authentication + Feedback Loop sign ups completed by Salesforce, excluding DMARC.

Many ISPs will immediately discard and block mail that is not authenticated correctly. Prevents phishing and malicious emails from getting through.



72

Make List Hygiene a Priority



A bounce rate over 20% for any single send can have serious consequences.

- Create a process to identify inactive subscribers.
- Remove bounced addresses from your data extensions between sends.
- Purge old or inactive addresses from your data extensions.
- Honor your end users' requests to unsubscribe.
- Remove subscribers who haven't opened your emails in months.
- Audit sources of inactive addresses.

This will also help you avoid spam traps, as those addresses do not open or engage.



73

How to Reduce Complaints



Complaints can be monitored through your general tracking reports, listed as Complaint Rate.

Clicking Spam is the most powerful defensive action a customer can take, followed by unsubscribing.

To reduce complaints:

- Make sure you have permission
- Don't buy/rent lists; Know who your data partners are
- Provide interesting and timely content
- Honor your subscribers' requests to unsubscribe
- Manage your database as well as your engagement level
- Conduct complaint analysis



74

Recovering from Poor Sender Reputation



It is difficult to recover from poor sender reputation.

Following best practices helps senders stay clear of major delivery issues.

If you need to repair Sender Reputation, do the following steps:

- Implement best practices
- Make corrective changes
- Repair broken processes
- Test and Monitor

For further assistance, ask your Account Executive about Deliverability Consulting services through Salesforce.

75



Tools to Monitor Deliverability



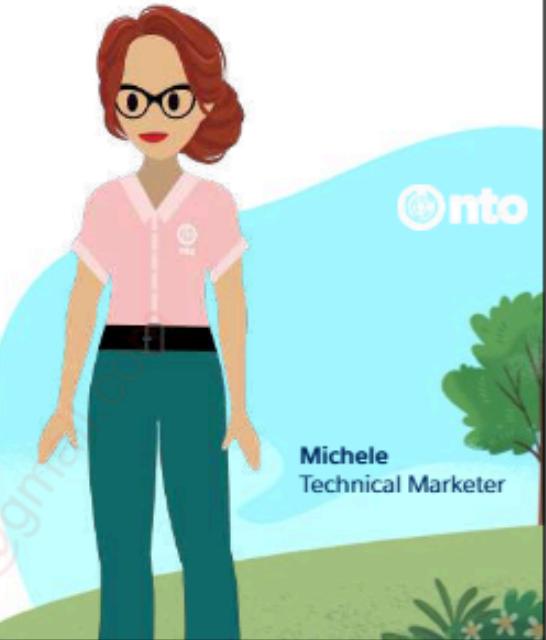
Tool	Description
Bounce Mail Management	Helps improve deliverability by automating suppression of bad addresses over time.
List Detective	A list of spam traps and bad email domains. Designed to protect you from mailing bad email addresses.
Content Detective	Scans your email for words, phrases, or patterns likely to trigger a spam filter.
Email Validate	Checks your email message for common issues that could prevent it from being sent.
Reply Mail Management	Automates reply management, including unsubscribe requests.
Deliverability and Engagement Reporting	Tracking information and Standard reports are available to monitor email performance and deliverability trends.

76

Deliverability: Excluding Recent Bounces



"We want to exclude any email addresses that have bounced in the last 30 days from sends. Here's the SQL for the Query. Let me know if you need any help."



77

NTO Recent Bounces SQL Query Statement

```
1  SELECT s.SubscriberKey as CustomerId, s.EmailAddress, b.EventDate  
2  FROM      _Subscribers s  
3  INNER JOIN _Bounce b  
4  ON          s.SubscriberKey = b.SubscriberKey  
5  WHERE      b.EventDate >= DATEADD(DAY, -30, GETDATE())
```

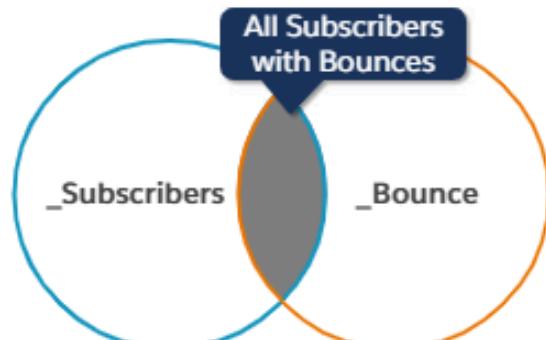
INNER JOIN _Bounce

ON s.SubscriberKey = b.SubscriberKey

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

DATEADD(DAY, -30, GETDATE())

Adds a time/date interval to a date and then
returns the date.



78

Your Turn



5-7: Create the Recent Bounces Exclusion List

Goal:

Create a data extension for every email address with a bounce event in the last 30 days.



Tasks:

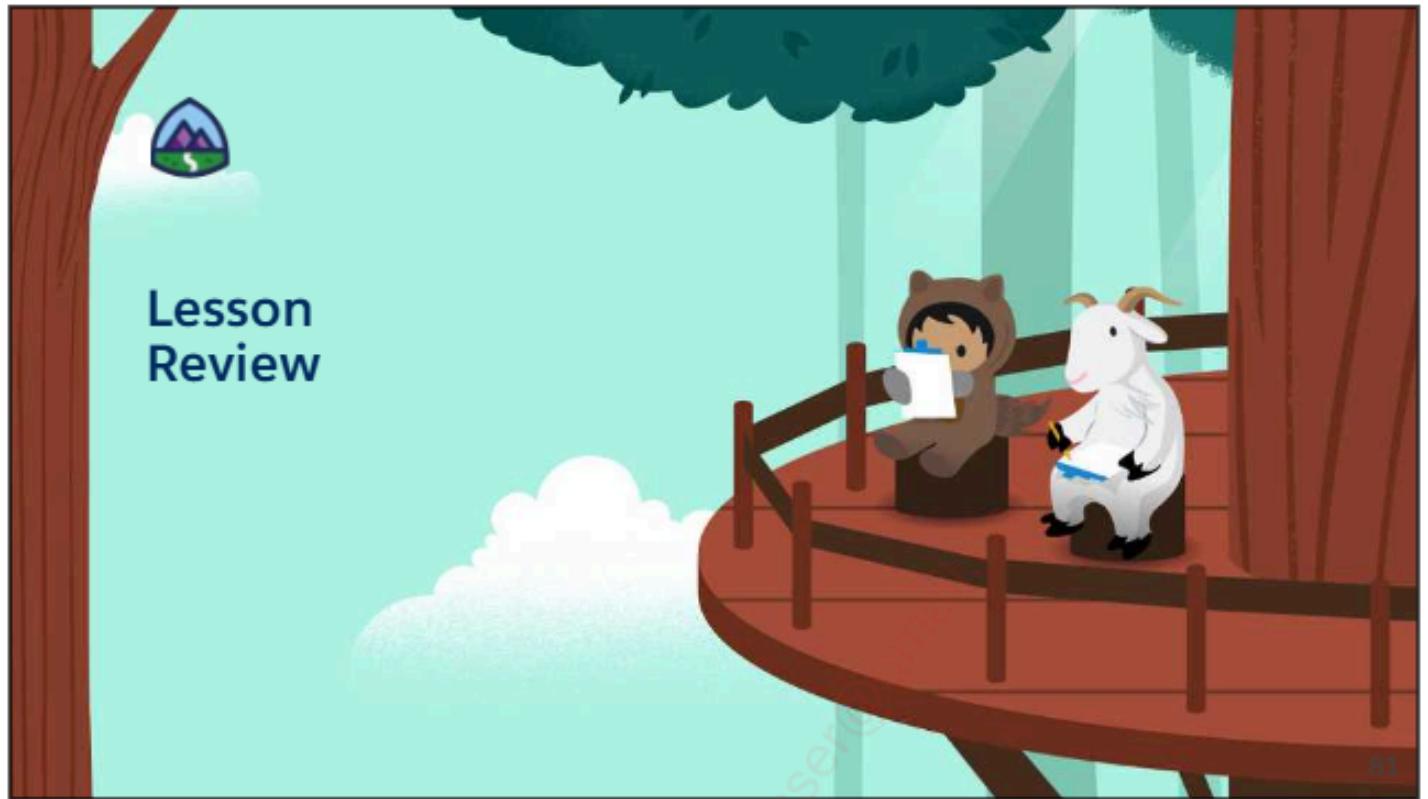
1. Navigate to Contact Builder.
2. Create a RecentBounces Data Extension.
3. Navigate to Automation Studio.
4. Create and run a Query to find the targeted exclusion audience.

Deliverability and Sender Reputation Checklist



- Organic list acquisition and explicit opt-in with clear expectations.
- Buttoned up mailing infrastructure and authentication.
- Routine maintenance on list hygiene, review and manage bounces.
- Focus on active and engaged audience.
- Create a 1-to-1 relationship with your customer with compelling and personalized content.
- Listen to your customers; email is a 2 way street: unsubscribes, complaints, lower engagement, preferences, blocks.
- Test and analyze, then test some more.





Lesson Review

81

Lesson Review



Question 1:

A marketer wants to scan their email for words or phrases that might get flagged in a spam filter.

What tool should they use?

A: Subscriber Preview

B: Content Detective

C: Validate

D: Test Send

83

Lesson Review



Question 2:

What **two** elements are required for an email to pass Email Validation for a commercial send?

A: Physical mailing address

B: Unsubscribe link

C: Consent to collect information

D: Right to be forgotten

84

Lesson Review



Question 3:

What tool can be used to allow a list-level unsubscribe from a data extension?

A: Exclusion list

B: Suppression list

C: Publication list

D: Audience list

85