

Lesson Review



Question 4:

What **two** best practices can a marketer implement to ensure optimal deliverability?

A: Deleting unsubscribed contacts from All Subscribers

B: Honoring subscriber permission

C: Buying lists from trusted partners

D: Acquiring subscribers through valid opt-ins

86

Lesson 5: Hit the Trails!



Modules:

[Email Marketing Strategies](#)

[Quick Start: Create and Send an Email with Marketing Cloud](#)

[Email Creation and Sending](#)

[Email Deliverability Concepts](#)



87

Helpful Resource Links: Message Testing, Delivery, and Email Marketing Best Practices



Email Deliverability Best Practices

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

Bounce Mail Management

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

CAN-SPAM Requirements

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

Get Started with Content Builder Approvals

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





Lesson 6

Marketing Automation



1

Course Roadmap

2

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:

- Automate extract, transform, and load (ETL) activities with Automation Studio.
- Design the customer journey using automation tools within Marketing Cloud.
- Know the use cases for different automation activities in Automation Studio and Journey Builder.
- Describe programmatic messaging capabilities.

3



Automation: Abandon Cart Campaign

"We need to automate our Abandon Cart Campaign. Let's send the High and Low Value emails the morning of the day after the cart is abandoned. If they don't engage with the email, we want to send them a follow up message the next day."

4



What is Marketing Automation?



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



5

Why Automate?



- Process optimization and improved efficiencies
- Greater targeting of messaging
- Improved customer experience
- Higher conversion rates
- Ability to combine data from multiple sources



6

Common Use Cases



Drip Campaigns

Build out a series of messages that send over time.

- Welcome Program
- Loyalty Campaign
- Newsletters



Scheduled Automations

Schedule recurring activities and workflows.

- Nightly Data Ingestion
- Run a Weekly Report
- Update a Data Extension



Simple Automated Messages

Capability to automate message sending with segmentation by data.

- Birthday / Anniversary
- Renewal Reminder
- Post-Event Email



Triggered Automations

Automate responses based on subscriber actions or behavior.

- Website Click
- Cart Abandonment
- Purchase Confirmation

7

Journeys and Automations



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



Automation Studio

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



Journey Builder

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



Triggered Emails/API

- Automatic response to a subscriber action

8

Automation: Data Imports

“Can you work with Michele to set up automated imports for the Abandon Cart data so that we don't have to manually upload it every morning?”



onto

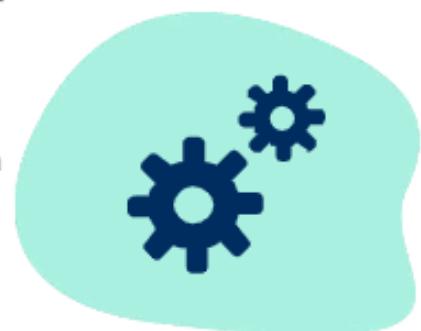
Isabelle
Manager of
Digital Marketing

9

Get to Know Automation Studio



- Used to execute complex marketing and data management activities on an immediate, triggered, or scheduled basis.
- Use the workflow canvas to build simple or multi-step automations.
- Most commonly used for Extract, Transform, and Load data activities.
- Enables you to import, export, decrypt and transform all sorts of data, from any external data source, for use in Marketing Cloud.
- Bring all your data into one place by automating processes on a regular basis.
- Create Journey entry sources with automations.



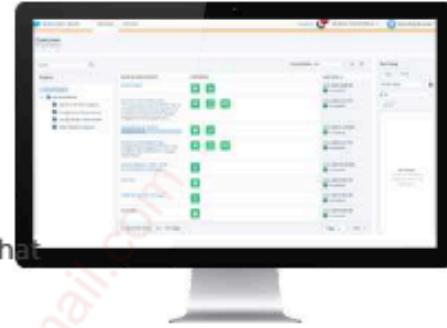
10

Automation Studio – Overview Page



When you access Automation Studio, an Overview page appears showing this information:

- Up to 50 automations in your account
- A snapshot view of the included activities
- The automation's run history
 - Run history will include successful runs and error messages
 - A specific error message will show on the activity that errored in the hover
- A folder structure to organize your automations
- List View and Filter View options with filtering capabilities
- Ability to run or delete the automation directly from the overview screen



¹¹

Creating an Automation in Three Easy Steps



Automation Studio provides a simple drag and drop workflow editor to assist you in creating an automation in three easy steps. Activities for your automation can be created within the automation or prior to creating the automation.



¹²

Automation Studio: Starting Sources



Source & Options	Description	When to Use
Schedule – None (run once)	Automation runs once.	You will not use this automation regularly.
Schedule	Automation runs based on schedule definition (hourly to yearly).	You want to consistently run activities based on time of day.
File Drop – No Filename Pattern	Automation runs when a file is dropped into a designated FTP folder. Runs regardless of naming convention of file.	You want activities to run based on when data is ready.
File Drop – Use Filename Pattern	Automation runs when a file is dropped into a designated FTP folder only if the file includes a designated file name.	You want activities to run based on specific data being updated.

13

File Drop Starting Source



- When a file is placed in the folder, the automation starts.
 - The Marketing Cloud Administrator can configure which folder to use on Enhanced FTP site.
 - The file can contain a filename pattern instead of a fixed filename.
 - When filename pattern is used, a single FTP folder can be used for multiple triggered automations.
 - Each file can only trigger one automation to begin.

14



Triggered Starting Source

- The Trigger Starting Source in Automation Studio is used with automating files from AWS, Google Cloud, and Azure.
- When you create a trigger automation, enter a file name pattern and choose a file location.
- Create a trigger API that monitors the external file location.
- Marketing Cloud listens for the trigger API and runs the automation when a file that matches the pattern is placed in that location.



15



Automation Workflow

Build your Automation Workflow with Activities & Steps.

Workflow

Your Automation Canvas where you define and create your:

- **Activities:** A task for the automation to execute.
- **Steps:** The stages of the automation. Controls the order in which activities occur.

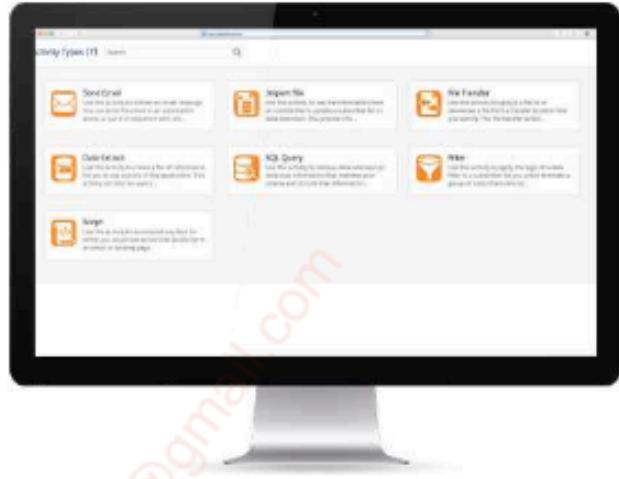


16

Automation Studio Activities



- Reusable components that perform actions, like a data copy, an import or a SQL Query.
- Once created, add your activity to an automation to run it on a regular basis.
- Available activities depend on the functionality available in the account.



17

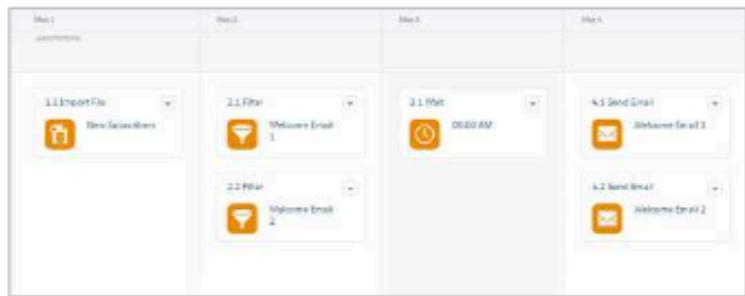
Automation Workflow: Steps



Build your Automation Workflow with Activities & Steps.

To define an automation, you begin by placing activities into Steps.

- An automation can have multiple steps.
- Each step can consist of multiple activities.
- All activities within one step run concurrently.
- All activities within one step must execute successfully before beginning the next step.



18



Common Activities

Activity Name	Description
Data Copy or Import Activity	Copy data from an existing data extension or use an outside file to update a data extension.
File Transfer Activity	Unzip or decrypt a file found in the Marketing Cloud's Enhanced FTP directory. Securely transfer files from the Marketing Cloud's secure file transfer location, the Safehouse, to a selected FTP location.
Extract Activity	Extracts Marketing Cloud data to one or more zipped files for your use outside the Marketing Cloud application. It can also be used to convert an XML file into a comma-delimited, tab-delimited, or pipe-delimited file for import into your account.
Filter Activity	Apply the logic of a data filter you select to create or refresh a data extension in Automation Studio.
SQL Query Activity	Retrieve data extension or data view information, then store it in a data extension.
Send Email Activity	Choose and configure an email message to be sent as part of one or more automations.

19



Data Copy or Import Activity

- A Data Copy or Import Activity is the definition of an import.
- You provide all the information the activity uses each time it runs. This information helps the activity run with the click of a single button, or as part of an automation.
- Use this option for frequent imports that have the same qualities every time.
- Import Activities always import files from an FTP Site.

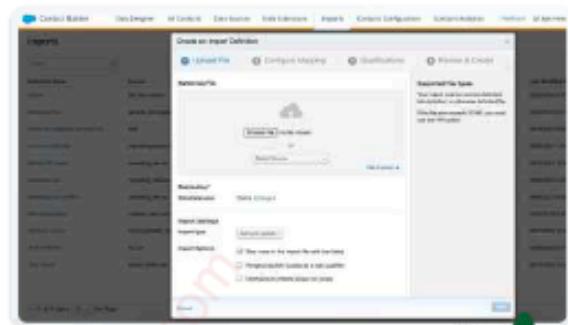
Data Extension							
SubscriberKey	EmailAddress	First_Name	Last_Name	Gender	DOB	Address	City
224990033	mhaske2249...	Nalin	Haske	M	7/1/1991 12:0...		
224990034	rberra22499.0	Rachel	Berra	F	8/5/1998 12:0...		
224990035	jcalabrese224...	Jessie	Calabrese	F	8/24/1998 12:0...		
224990036	dcacy22499.08	Cheng	Tracy	M	1/23/1999 12:0...		
224990037	edscott22498...	Emery	Durant	M	11/25/1995 12:0...	2151 B...	
224990038	glossbeck2249...	Grody	Lawless	M	7/23/1995 12:0...		
224990039	mpoth122499...	Mosie	Griffith	M	9/17/1993 12:0...		
224990040	ddhodson224...	Dwan	Christensen	M	9/20/1999 12:0...		
224990041	reinigung224...	Natalie	Cronkite	F	1/21/1996 12:0...		
224990042	pbentkem2249...	Jeanne	Bentkem	M	9/25/1994 12:0...		
224990043	newland22499...	Holden	England	M	12/6/1993 12:0...	881A 18...	
224990044	holtblake2249...	Kristina	Dobtak	F			
224990050	lmedlock22499...	Lemar	Medlock	M	3/29/1992 12:0...		
224990059	rmeinhart22...	Margaret	Wetherman	F	8/24/1996 12:0...		
224990060	hledwag22499...	Heribert	Ludwig	M	6/30/1983 12:0...		
224990061	grosvenor2249...	Gene	Grosvenor	M	3/21/1985 12:0...		

20

Merge & Transfer Data Across Data Extensions



- Use an Import Activity to merge and transfer data across data extensions
- Import activities have been optimized for DE to DE imports, and are 10 times faster than before
- Recommended over a SQL Query as the Import Activity does not have the same 30 minute timeout window



NOTE: In Contact Builder, create an import definition that merges or transfers data across data extensions. Then in Automation Studio, add the definition to an import activity and use the activity in an automation.

21



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6-1: Create the Abandon Cart Import Activity

Goal:

Create an Import Activity that will contain all the information needed to import data into the NTOCartInfo Data Extension.

Tasks:

1. Locate and examine the NTOCartInfo.csv.
2. Create and run an Import Activity to import the data.
3. Check for errors.
4. Verify 95 records in your Data Extension.



22

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6-2: Create the Abandon Cart Data Automation

Goal:

Automate NTO's nightly
Abandon Cart Import.



23

Tasks:

1. Create an automation in Automation Studio.
2. Add the Import Activity for NTOCartInfo.
3. Activate the automation.

Automation: Data Segmentation



“Now that we've got data coming in,
is there a way we can also automate
segmentation?”



Isabelle
Manager of
Digital Marketing

24

Automating Segmentation



Filter Activity

A Filtered Data Extension created by a Filter Activity can be refreshed via a Filter Activity.



SQL Query Activity

A Results Data Extension used in a Query can be refreshed via a SQL Query.

25

Creating Filter Activities



- A Filter Activity is the engine that runs a data filter automatically.
- A Filter Activity applies the logic of a data filter to the data extension used to create it.
- The Filter Activity copies all the attributes in the source data extension to create a new data extension for the results of the activity.
- Any time the Filter Activity is run, it will place results in the data extension that is saved when the Filter Activity is created.

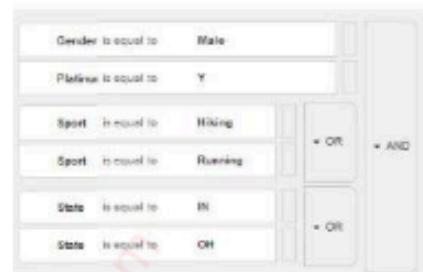


26



Working with Data Filters

- A data filter is a group of criteria that segments a data extension to use in an automation to refresh segments.
- You can select only one data extension per Automation Studio filter activity.
- You can also select a Data Filter as the recipient in a Send Email Activity, Send Flow, User-Initiated Email.
 - This option segments the data at time of send and does not create a new data extension.

**NOTE:**

For date attributes, choose Account Time Zone to use the time zone for the account. Leave Account Time Zone unchecked to use Central Standard Time.

27



Automating the Refreshing of Segments

Step One:
Create
the Data Filter



Defines the rules and conditions

Step Two:
Create
the Filter Activity



Creates the Filtered Data Extension

Step Three:
Automate via
Automation Studio



Refreshes the Filtered Data Extension

28

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6-3: Create Abandon Cart Data Filters and Filter Activities

Goal:

Create filtered data extensions and activities to refresh them for the Abandon Cart Campaign.



29

Tasks:

1. Create a Data Filter for everyone on the AbandonCart Data Extension who has a low cart value.
2. Create a Data Filter for everyone on the AbandonCart Data Extension who has a high cart value.
3. Create Filter Activities to automatically refresh the data.

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6-4: Add Segmentation Activities to the Abandon Cart Data Automation

Goal:

Automate NTO's Abandon Cart segmentation activities.



30

Tasks:

1. Edit an automation in Automation Studio.
2. Add the segmentation activities for the Abandon Cart campaign.
3. Activate the automation.

Other Data Activities



File Transfer

Allows you to de-encrypt or unzip a file, or to take a file that has been extracted from the application and place it on the Enhanced FTP.

NOTE:

If the encrypted file is on an external FTP, you need to add an additional File Transfer activity to the workflow.

The first one moves the file to the safehouse, the second one decrypts the file.

31

Data Extract

Gives you the ability to export tracking information and data from a data extension. This activity also allows you to transform an XML file into a comma delimited, tab delimited, or pipe delimited file to import into the Email application.

NOTE:

If you are extracting data, you need to add a File Transfer activity to the workflow. This activity moves the file from the safehouse to your Enhanced FTP.

Other Activities



File Transfer: Manage File
and
Data Copy or
Import Activity



Data Extract Activity
and
File Transfer: Move a File
From Safehouse



Data Extract Activity
and
Data Copy or
Import Activity

32

File Transfer Activity: Manage File



The download option will decrypt or unzip a compressed file prior to import.



Compressed

If the file is compressed, the File Naming Pattern that you enter in the Source section must have a .ZIP extension.

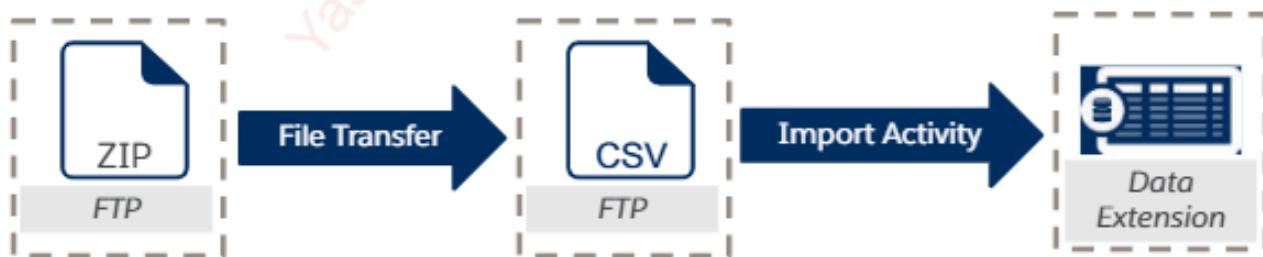


Encrypted

If the file is encrypted, the file must be .PGP or .GPG. The application supports PGP (.PGP) and GNU Privacy Guard (.GPG) message encryption.

33

File Transfer: Manage File and Import Activity



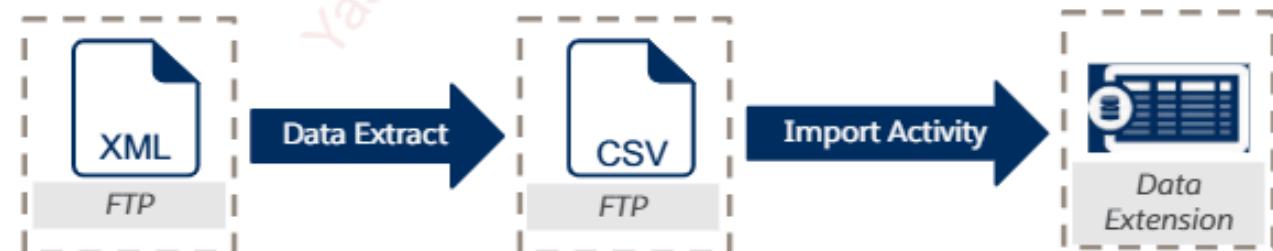
34

Data Extract and File Transfer: Move a File from Safehouse



35

Data Extract and Import Activity



36

Email Message Activities



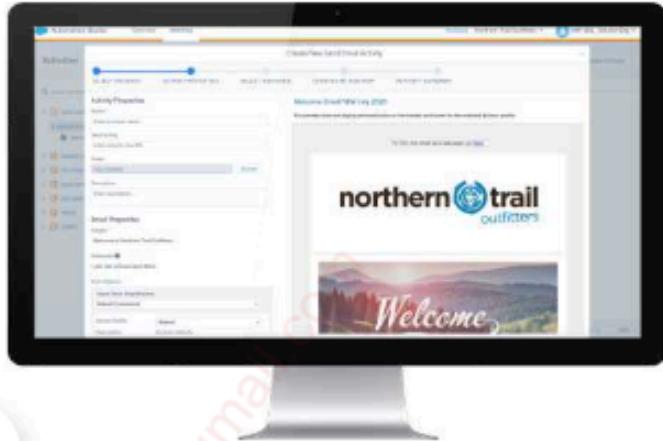
Send Email Activity

All the information for an email send are saved into one convenient definition.

NOTE: Journey Builder is well suited for email volumes up to 2 million/hour; although there are many factors that affect throughput.



For volumes greater than 2 million per hour, contact your Marketing Cloud Account Executive.



37

Wait Activity



A Wait Activity can be specified for a Duration or a Specific Time, which forces the automation to wait before running the next step.

Examples:

- Used when importing data then extracting results.
- Used when staggering imports.
- Used when sending emails.



NOTE:

An automation cannot exceed a time period of one year and the automation cannot be run again until all steps are complete.

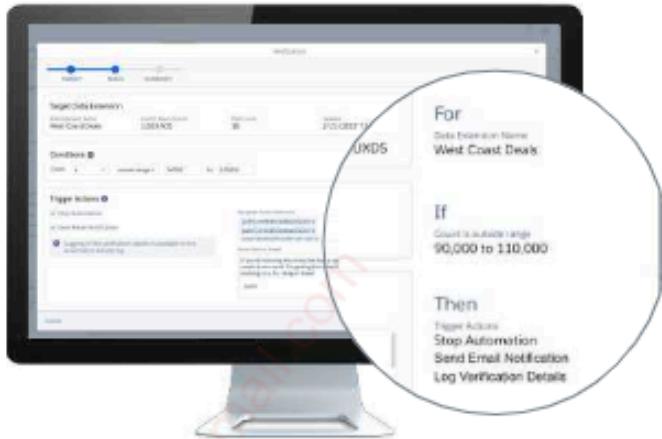


38

Verification Activity



- Allows you to stop an automation if the subscriber count in a Data Extension is outside of your expected range.
- Options are to stop automation, send an email notification, and/or log the details of the verification activity.
- Great for eliminating 0 send email activities that return no tracking results.



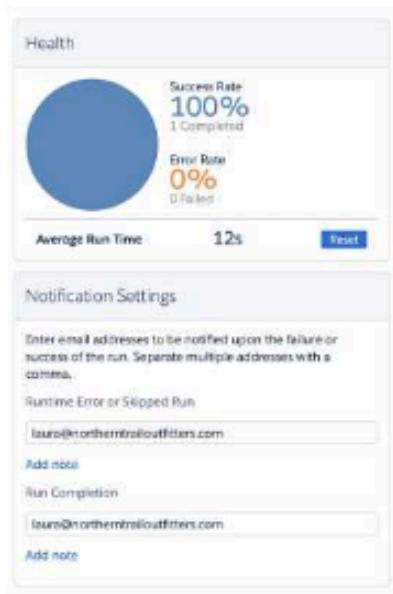
39

Automation Monitoring and Troubleshooting



Review Automation Activity tab.

- Shows you all the details of an automation, including the health of the automation and average run time.
- Option to send a Status Notification to one or more email addresses when the program completes or errors.
- Ability to view specific time period.



40

Testing and Automation Studio



Run Once

- When working in Automation Studio, testing is easy by clicking the Run Once button.
- Run Once will run the automation one time, instead of using the defined schedule.

Advanced Run Once

- When an unexpected error happens with an Automation you may need to run a portion of the Automation to correct the situation.
- The Advance Run Once allows you to easily choose a subset of Activities to be run.

41



Your Turn

Brainstorm



30 mins.



Activity

What Would You Do – Abandon Cart Automation?

Work with other students to determine NTO's next steps to create and execute the Abandon Cart Campaign in Automation Studio.

- What do you need to send an email?
- What time do you want to send the emails?
- How can you follow up if there is no engagement?
- What is the best sequence for steps and activities?

42



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 1 Day



No Opens Follow Up
Did they open the
email?

43

NTO Abandon Cart Data Activities



Abandon Cart Data Activities

SUMMARY ✓ 7/26/2020 12:27PM (LAST SAVED)

WORKFLOW ✓ 5 ACTIVITIES BY 3 USERS

ACTIVITY NO ACTIVITY

Run Once Save

STARTING SOURCES

Schedule File Drop

STARTING SOURCE

SCHEDULE

ERB

Step 1 Step 2 Step 3

1.1 Import File Cart Info Daily Import

2.1 SQL Query Abandon Cart SQL Query

3.1 Filter High Cart Value Filter Activity

3.2 Filter Low Cart Value Filter Activity

Activities

Data Extract Data Factory Utility File Transfer

Filter File Event Import File

Import Mobile Devices Refresh Group Refresh Mobile Filtered List

REPEAT Once

STARTED 07/24/2020 3:00 AM

TIME ZONE: (GMT+05:00) India (East)

The schedule has successfully completed and must be rescheduled and activated to resume.

Skip Next Occurrence

44

NTO Abandon Cart Data Automation Solution



The screenshot shows the Journey Builder interface with the following details:

- Project Name:** NTO Abandon Cart Automation
- Summary:** ✓ 9/16/2020 4:01 PM (EST) 1 step
- Workflow:** ✓ 9 ACTIVITIES / 5 STEPS
- Activity:** 0 ACTIVITY
- Starting Source:** Manual Start
- Schedule:** Manual Start
- Step 1:** 1.1 Import File - Cart Info Daily Import
- Step 2:** 2.1 SQL Query - Abandon Cart SQL Query
- Step 3:** 3.1 Filter - High Cart Value Filter Activity
- Step 4:** 4.1 Wait - 09:00 AM
- Step 5:** 5.1 Send Email - Abandon Cart Low Value Email Send
- Step 6:** 5.2 Send Email - Abandon Cart High Value Email Send
- Step 7:** 5.3 Send Email - Abandon Cart No Opens

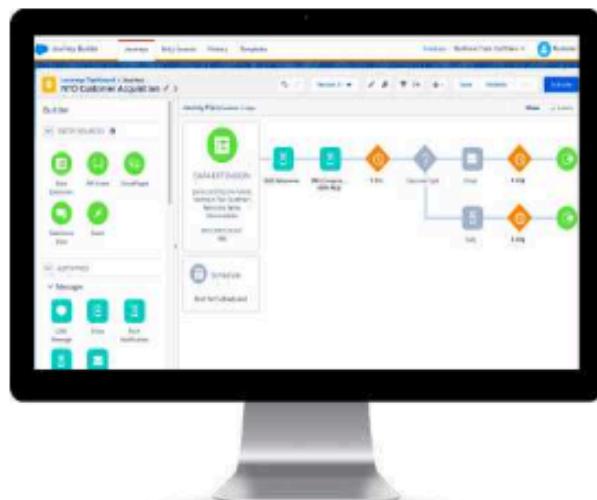
45

Know, Personalize, and Engage with Journeys



- Leverage data from any source, including Sales, Service, and Experience Clouds.
- Personalize every moment and treat each customer as a unique individual.
- Engage with your customers based on behavior and insights.

Keep messaging simple with Single Send Journeys or take your campaigns to the next level with Multi-Step Journeys.



46

Get to Know Journey Builder



Single Send Journeys



Multi-Step Journeys



Transactional Journeys

47

Journey Builder Dashboard



The screenshot shows the Journey Builder dashboard interface. The top navigation bar includes tabs for "Journey Builder", "Journeys", "Entry Sources", "History", and "Templates". On the far right, there are user profile and marketing specialist icons.

The main area features a "Journeys Dashboard" section with a summary: "6 Journeys". Below this, a sidebar lists "Journeys" (with "All Journeys" selected), "Scheduled Single Sends", "Recent Single Sends", and "Folders".

The central part of the screen displays a table of journeys:

JOURNEY #	STATUS	PERFORMANCE	LAST MODIFIED
API Journey 101 Version 1	Running	1 Entries	04/15/2020 2:54 PM
Case Survey Version 1	Draft	—	08/20/2019 4:32 PM
Case Survey v2 Version 1	Draft	—	01/27/2020 8:40 PM
New Journey - January 29 2020 3:41 PM	Sent	—	01/29/2020 1:43 PM
NTD Welcome Journey Version 1	Draft	—	07/01/2020 2:05 PM
Welcome Journey - August 20 2019 11:29 AM Version 2	Running	0 Entries	08/20/2019 12:33 PM

Several numbered callouts point to specific elements:

- 1 Points to the "All Journeys" button in the sidebar.
- 2 Points to the "New Journey" row in the table.
- 3 Points to the search bar at the top.
- 4 Points to the "Create New Journey" button at the top.
- 5 Points to the "Journeys" tab in the top navigation.
- 6 Points to the "Entry Sources" tab in the top navigation.
- 7 Points to the "Templates" tab in the top navigation.

48

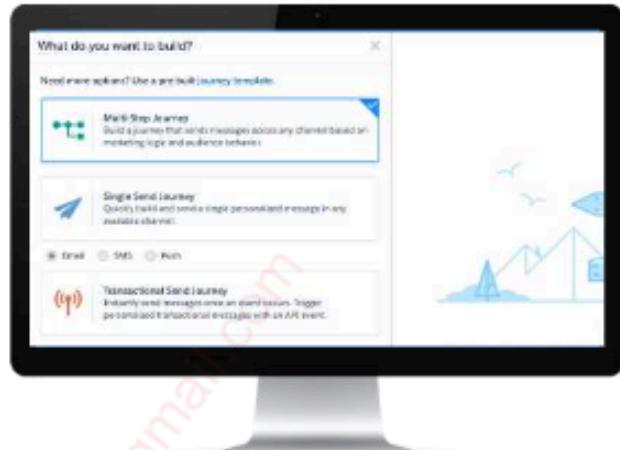
Creating a Journey



Single Send Journey – Quickly build and send a single personalized message in any available channel.

Multi-Step Journey – Build a journey that sends messages across any channel based on logic and audience behavior.

Transactional Journey - Use Transactional Send journeys to create, manage, and monitor transactional email sends in Journey Builder.



49

Single Send Journeys



- Manage simple, one-touch customer journeys.
- Define the target audience and apply a filter from Contacts.
- Add existing message content or create a message from scratch.
- Send or schedule the send for a later date and time.
- You can also monitor message engagement metrics all within the Journey Builder tool.



50



Multi-Step Journeys



- Manage customer journeys through a series of interactions with your brand.
- Can include multiple channels and customized journey paths based on customer interactions or attributes.
- Ability to measure a campaign's effectiveness against goals.
- Test branches with Path Optimizer to create the most effective interactions.



Multi-Step Journey

Build a journey that sends messages across any channel based on marketing logic and audience behavior.

Tip:

Keep journeys discrete and focused on a single marketing objective.



Transactional Journeys

- Manage and analyze transactional messages.
- Deploy to an email client or mobile device in real time initiated by a person or system.
- Contain information about the transaction or event.
- Deliver critical information immediately.



Transactional Send Journey

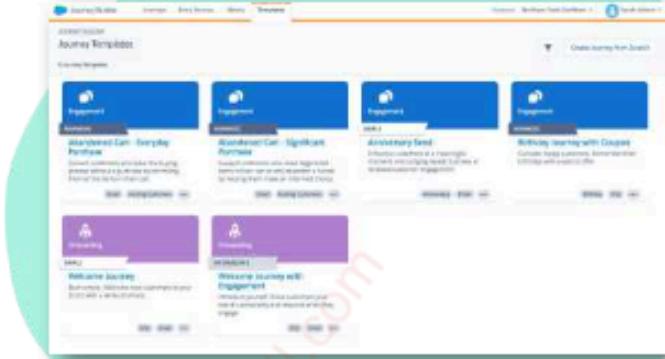
Instantly send messages once an event occurs. Trigger personalized transactional messages with an API event.



Journey Templates



- Are pre-defined Journeys.
- Show in-context guidance based on common use cases and known marketing best practices.
- Use a template as-is, or modify a template for your use case.
- Create custom templates and share them across business units.

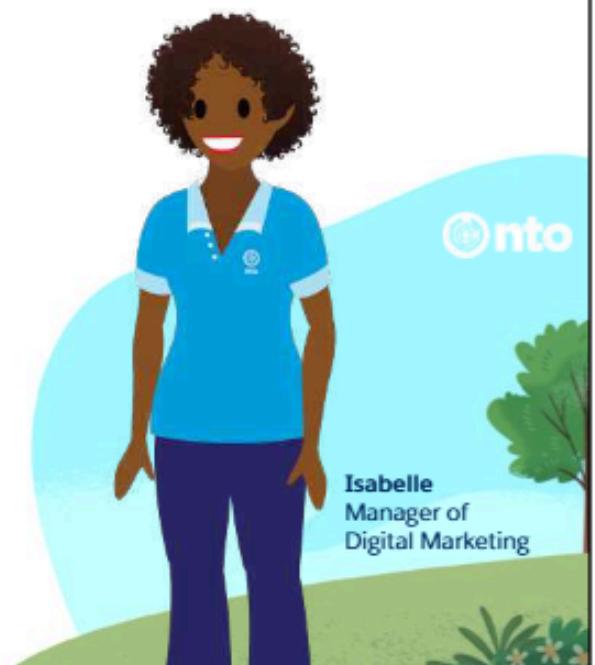


53

Single Send Journeys



“Here is the creative for our weekend sale promotion. Could you create, test, and schedule this to send on Friday? We want it to be exclusive for our myNTO members.”



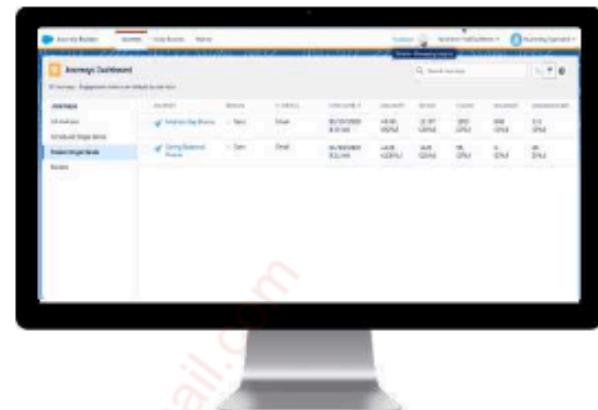
54

Why Single Send Journeys

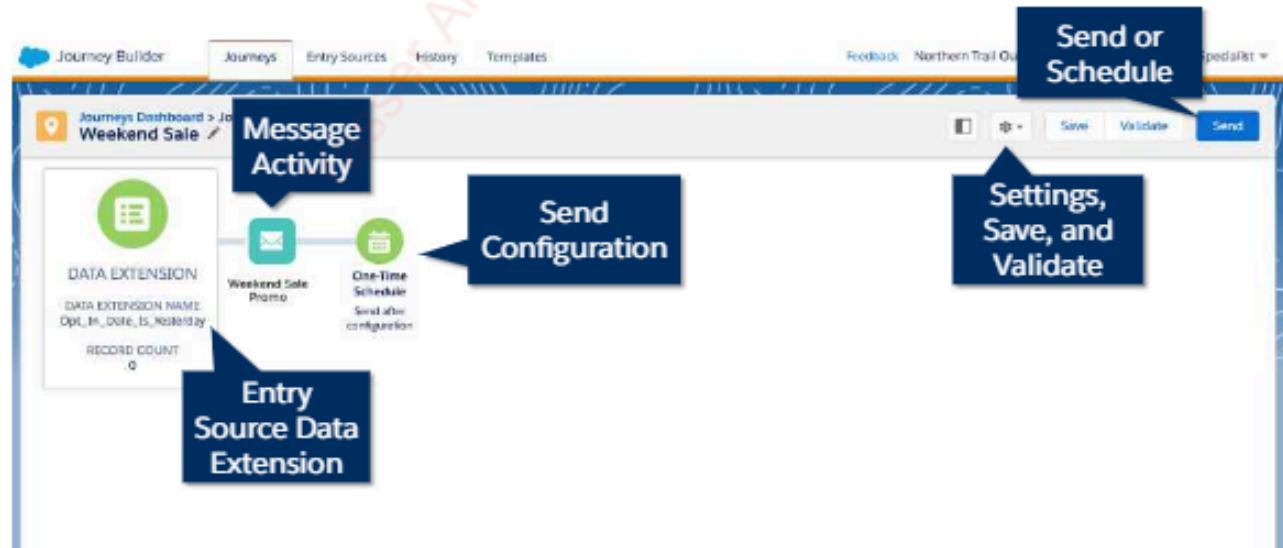


- Intuitive and simple to use
- Modify content on scheduled sends without rescheduling
- Consolidated view tracking and analytics
- Segment data from the Journey Builder canvas
- Control the Email Address source
- View your sends for all journeys in one place
- You don't always need a multistep, ongoing journey—sometimes you may want to use a single-send journey to:
 - Promote a new sale.
 - Offer a new product or service.
 - Talk about a new mobile app feature.
 - Share a white paper or other vital information.

55



Anatomy of a Single Send Journey



56

Configure Your Single Send Journey



3 Easy Steps



Choose a Data Extension



Craft and Test Content



Define when to Send

57

Choose a Data Extension



Every Single Send Journey starts with a Data Extension.

Ensure all of your data is connected to Contacts in an Attribute Group in Contact Builder or it exists in the Entry Source Data Extension. Then, use data for segmentation to make sure the intended contact enters the journey.



58

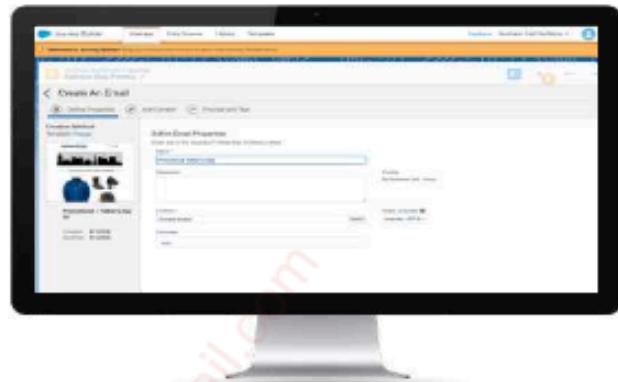
Craft and Test Content



You can select a Content Builder email and edit, preview, and test it directly in Journey Builder.

You can also create an email from scratch.

Update emails in a unified workflow that allows changes without navigating to other Marketing Cloud apps like Content Builder.

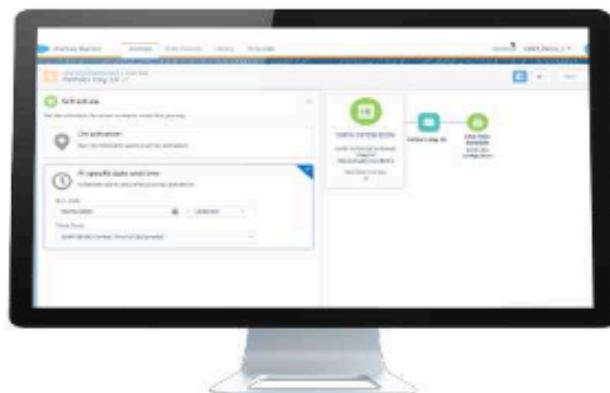


59

Define When to Send



- Choose between sending your message immediately or scheduling your send for a future date.
- Validate your Journey to make sure it's ready to be Activated.
- Once your email is scheduled, you can still modify the creative if something changes.
- Additionally, you can choose the data source for the email address if there is conflicting data.



60

Join Me



6-5: Create and Schedule the Single Send Journey

Goal:

Create and send the Weekend Sale Promo email in Journey Builder.



61

Tasks:

1. Navigate to Journey Builder and create a new Single Send Journey.
2. Create, Preview, and Test the Weekend Sale Promo from the canvas.
3. Schedule the email for sending.

Multi-Step Journeys



"We want to make our welcome campaign 3 steps and use Journey Builder for sending. Can you help? Michele created the emails in Content Builder."



62

Journeys are the Building Blocks of Engagement



Awareness and Acquisition

- Informational
- Welcome New Subscribers
- First Purchase
- Refer a Friend

Onboarding and Engagement

- Encourage a Sign Up
- Influence Next Purchase
- Download the Mobile App
- Encourage Survey Completes
- Profile Completion

Retention and Advocacy

- Product/Service Review
- Abandoned Cart
- Re-Engagement
- Win-back
- Birthday/Anniversary

63

Approaching Your Journey Strategy



Goal



Audience Definition



Data Audit



Content and Channels



Journey Mapping

64

5 Steps to a Journey Strategy



Set a goal:

Drive new loyalty membership sign ups



Define your audience:

New subscribers



Identify and collect data:

Web and in-store opt-ins



Craft content and channels:

3 Welcome Emails



Design the journey

Different paths dependent on subscriber data and engagement

65

NTO's Welcome Journey

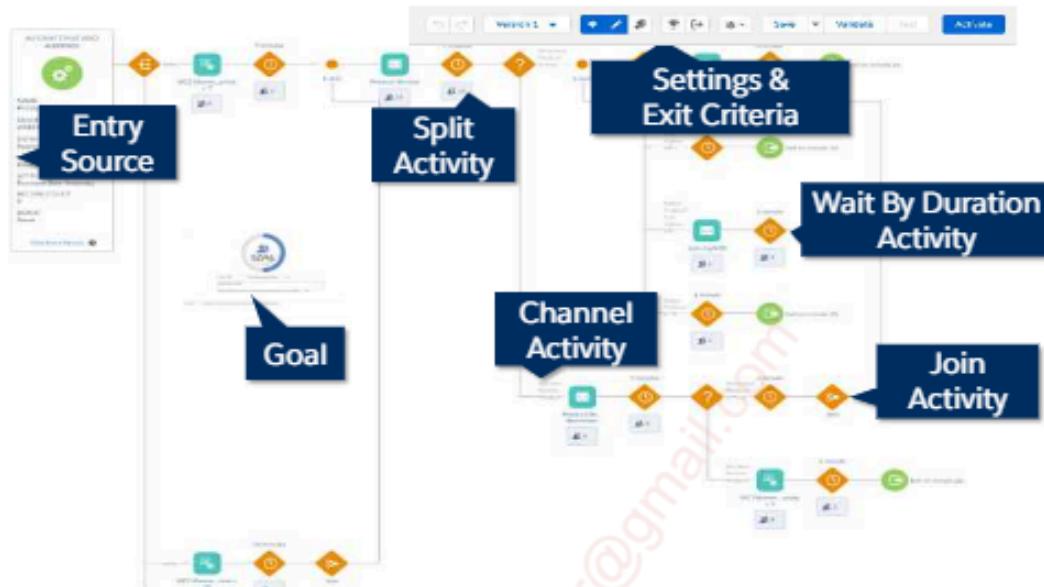


- NTO wants to inject customers into a Welcome Series Journey for those contacts who have opted in to begin the Welcome Series Journey the following day.
- Contacts with an opt-in date of Today Minus 1 will be injected into the journey.
- The goal of the journey will be to drive new loyalty membership sign ups.



66

Anatomy of a Multi-Step Journey

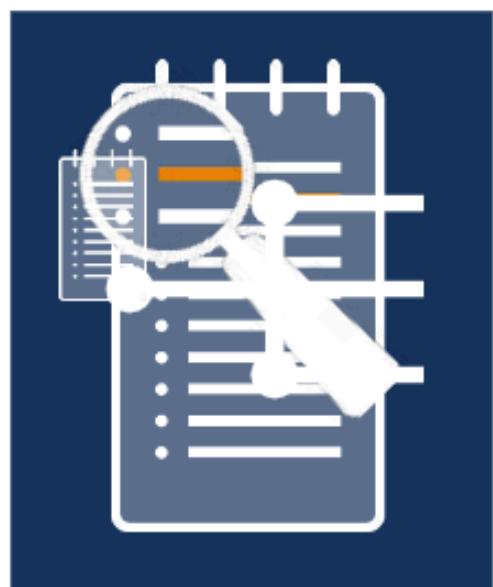


67

Define Your Audience: Entry Sources



- The Entry Source on the canvas tells Journey Builder where customers entering this journey come from.
- Each journey must include an entry source.
- When the Entry Source criteria have been met, Journey Builder enters the contacts into the journey.
- Depending on configuration, Journey Builder will evaluate all of the records in the Entry Source, or it will evaluate only new records.



68

Entry Source Scheduling



You will have different options depending on your entry source.

Schedule Option	Description	When to Use
Run Once	Journey will only run once when specified.	When journey interactions are infrequent and not ongoing.
Recurring	Run the journey at customized intervals.	Data is pre-filtered outside of Journey Builder or filtering is not complex. All data for filtering is linked to the Contact.
Automation	Run the journey after an automation completes	Data is pre-filtered in Automation Studio through Filter Activities and/or SQL Query Activities.



BEST PRACTICE:

Pre-filter your data before adding it to the journey. Use an ETL tool like Automation Studio to perform large scale segmentation prior to injection into Journey Builder.



69

Entry Source Data Processing



- You can set up entry of contacts into a journey in two ways.
 - Enter the journey one time when it is activated.
 - If the entry source data is continually updated, set a schedule to occur once or continually.
- When you set a schedule that repeats, you select a processing option.
 - To evaluate only new contacts added since the previous run for journey entry, select Evaluate new records only.
 - To evaluate all records in a data extension each time according to the entry source's schedule, select Evaluate all records.

Tip:

Selecting the right processing option improves JB's performance and ensures that all eligible contacts in the entry source enter the journey without slowing the admission process.

70



Available Entry Sources

All journeys begin with an entry source.

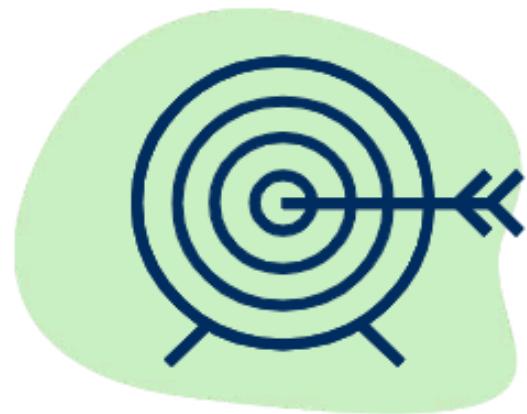
Entry Source	Description
Data Extension	Uses an existing data extension, or a List from MobileConnect, and places customers into the journey according to a schedule.
API Event	Connects the journey canvas to an API used to admit contacts into a journey.
CloudPages Event	Admit Marketing Cloud contacts into a journey using the CloudPages Form Submit Event.
Salesforce Data Event	An action in Sales or Service Clouds, such as creating or updating an object record, injects a contact into a journey.
Event	An event prompts one or more contacts to enter a journey. Note: this is a legacy entry source.

71



Data Extension Entry Source

- Include attributes needed for personalization or dynamic content in the data extension.
- Use a sendable data extension.
- Prepare any suppression or publication data extensions in advance. You can then select these in the send email activity during configuration.
- Create a single data extension using a query if the data for the journey is stored in multiple data extensions.
- Pre-filter your data extension, if possible, to speed processing.
- Link the data extension into the data model in Contact Builder.



72

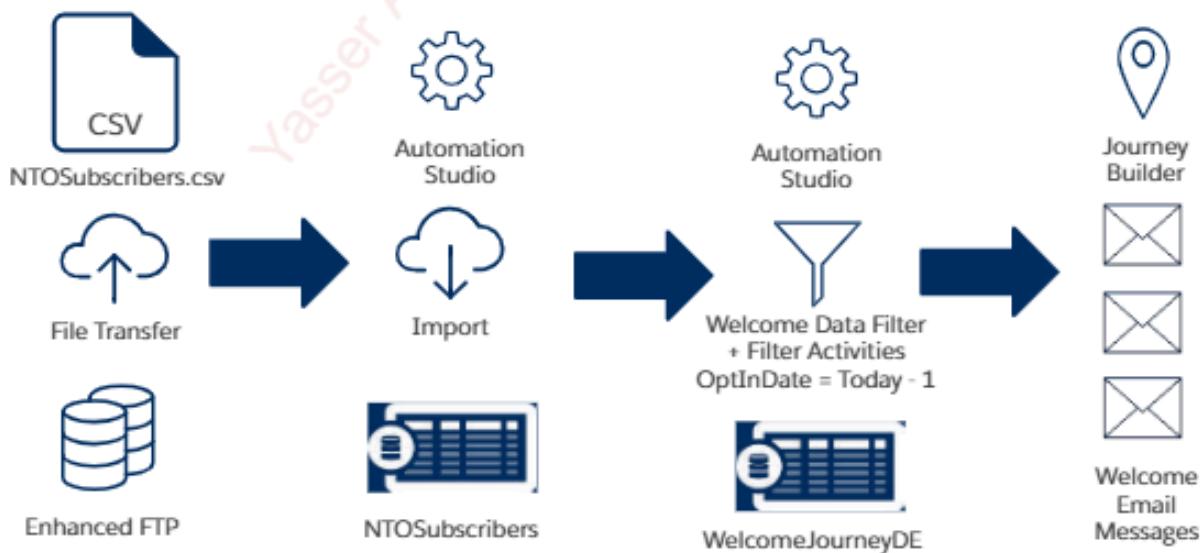
NTO's Welcome Journey

"We should create our welcome journey with one of the templates. This will make it easy. As a best practice, let's set up a filter in Automation Studio so we can segment everything prior to the journey's entry."



73

NTO Welcome Series Automations and Journey



74

Journey Builder: Automation Schedule



Step One:
Create
the Data Filter



Defines the rules and conditions

Step Two:
Create
the Filter Activity



Creates the Filtered Data Extension

Step Three:
Automate via
Automation Studio



Refreshes the Filtered Data Extension

75

Your Turn



6-6: Create and Automate the Welcome Step 1 Filter Activity

Goal:

Create and automate the data extension for the Welcome Journey.



76

Tasks:

1. Navigate to Email Studio and create a Data Filter.
2. Navigate to Automation Studio and create a Filter Activity.
3. Create an Automation and put the Filter Activity in Step 1.
4. Save the Automation.

Join Me



6-7: Create the Welcome Series Journey and Configure the Entry Source

Goal:

Create a new journey and define the entry source.



Tasks:

1. Create a journey using a template.
2. Define the entry source.

Explore the Journey Builder Toolbar



The toolbar shows the status of the journey you're viewing. This is also where you manage the journey you've created.

- Undo, redo, copy, and paste actions related to the journey plan.
- Toggle open or close the sidebar containing canvas activities.
- Turn on guidance.
- Set a goal.
- Define exit criteria.
- Edit settings.
- Save, validate, test, and activate the journey.

Contact Entry Settings



Re-entry anytime

Contact may enter the journey **more than once** before exiting the journey. This means that a contact is injected into the journey each time the contact meets the filter criteria, even if that contact is already in the same journey.

Re-entry only after exiting

Contact can enter and exist in the journey **only once** before exiting the journey. This means that a contact is injected into the journey when it meets the filter criteria, but is not re-injected until the contact has exited the journey.

No re-entry

Contact **cannot re-enter** a journey at any point. This means that a contact is injected into the journey one time only.

79

Journey Settings: Default Email Address



- Define a default email address and mobile number for each contact before sending messages in a journey.
- Often, Marketing Cloud stores more than one email address or mobile number for a single contact. Use this feature to designate which address or number receives the message.
- Before you set a default email address, configure the journey's entry source. Setting up the entry source populates the entry source email attribute option.
- The email address used for Journey Builder sends will overwrite the email address value in All Subscribers at send time.

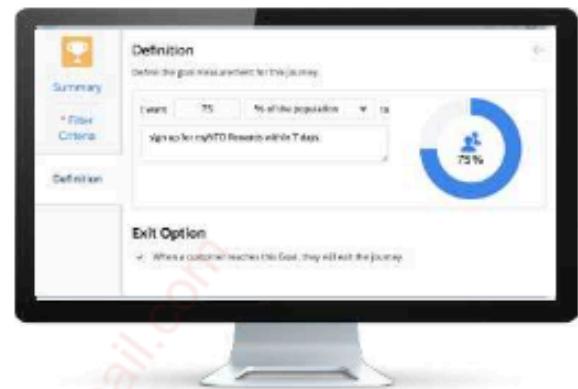


80

Setting a Goal



- The target that is set in this step determines how Journey Builder evaluates the Journey's performance.
- If a goal is defined, Journey Builder automatically checks for contacts who have reached the goal at the following times:
 - Each time a wait period expires.
 - Every 24 hours. (if the Exit Option is selected)
- After setting a goal target, select Exit Option if contacts should leave the Journey when they reach the goal.
- Data must be in an Attribute Group for a goal to be set.

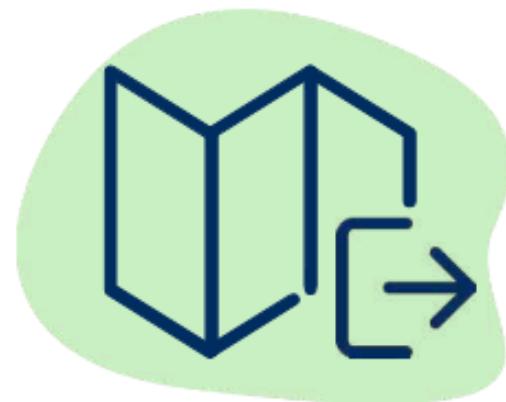


81

Exit Criteria



- Create a simple or complex Contact Filter to remove contacts from a journey.
 - Separate Goal attainment from Exit Criteria.
 - Understand why a contact exits the journey.
 - Evaluation of filter occurs at expiration of wait activities.
- Data needs to be stored and configured in Contact Builder.



82

Join Me



6-8: Configure Journey Settings and Goal

Goal:

Configure the journey settings and create a goal using contact data.



83

Tasks:

1. Configure the journey entry settings.
2. Create a goal for the journey.

Message Activities



Application	Activity	Description
Email	Email	Sends any email created in Email Studio or Journey Builder to contacts that reach this activity
Mobile Studio	SMS	Sends SMS messages configured in MobileConnect to contacts that reach this activity
	Push Notification	Sends push notifications to contacts that reach this activity
	Inbox (Mobile Push)	Sends a message to the app inbox of contacts that reach this activity
	In-App Message	Sends a full-page, modal, or banner message to contacts that reach this activity
	LINE Message	Sends a LINE carousel or multi-content message to contacts that reach this activity
Advertising	Advertising Audiences	Creates an Advertising Audience from available social networks
	Advertising Campaign	Creates an Advertising Audience and a simple Facebook advertising campaign

84

Flow Control Activities



Activity	Description
Decision Split	Divides contacts based on a change in data associated with a contact.
Random Split	Divides the group of contacts in the journey into random groups in a configurable number of branches
Engagement Split	Divides contacts based on a customer behavior.
Join	Directs contacts from one branch into another branch.
Path Optimizer	The Path Optimizer flow control activity helps you test up to 10 variations of a journey path to determine which path performs best in your journey.

85

Flow Control Activities



Activity	Description
Wait by Duration	Keeps contacts from reaching the next activity for the time period set by a marketer.
Wait by Attribute	Keeps contacts from reaching the next activity until the day and time stored in a date-based attribute for that contact.
Wait Until Date	Keeps contacts from reaching the next activity until the specified end day and time.
Wait Until Event	Holds contact in a wait step until a specified behavior occurs (an API Event) before proceeding to the next step in the journey.
Wait Until Push Engagement	Display messages based upon user behaviors that occur within your app.

86

Customer Update Activity



- An activity that updates values in a sendable data extension based on the journey.
- Select a data extension that the activity writes data to and choose the Attribute or Value that the activity is to update.
- Up to 5 attributes can be updated.
- Updating an Attribute or Value overwrites the existing value; the existing value is not increased by increment.



87

Prepare Your Entry Data

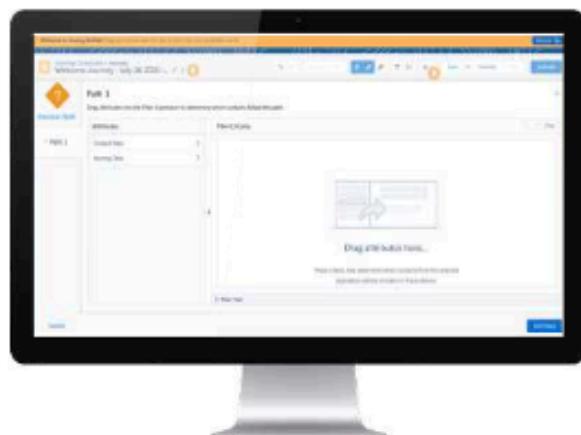


Journey data is the data in the entry data extension when the contact enters the journey.

- It is a snapshot of your contacts' data attributes taken at the moment they are added to the journey.

Contact data is updated as the journey goes on, but entry data is not.

- You can compare entry data to contact data to present before-and-after data points in personalization strings, for example, or to watch for changes in an attribute.
- You can filter on entry or contact data in entry sources or decision splits.



88

Journey Data vs. Contact Data Scenarios



Entry Data Extension

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

Journey Data

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

89

Journey Data vs. Contact Data: Change in Data



Entry Data Extension

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	True

Journey Data

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

Data in Entry Source Data Extension is updated after journey begins.

Note: The Journey Data doesn't change.

90

Journey Data vs. Contact Data: Personalization Strings and Dynamic Content



Entry Data Extension	
CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	True

Journey Data	
CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

Where do Personalization Strings and Dynamic Content get data?

Journey Data



91

Journey Data vs. Contact Data: AMPscript



Entry Data Extension	
CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	True

Journey Data	
CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

Where does AMPscript get data?

Data Extension defined in code.

```
SET @prodRows =
LOOKUPROWS('CartInfo', 'OrderID', @orderId)
FOR @i = 1 TO ROWCOUNT(@prodRows) DO
/* Set var to row currently looping
through */
SET @prodRow = ROW(@prodRows, @i)
/* Set variables */
```

92

Journey Data vs. Contact Data: Goals and Exit Criteria



Entry Data Extension

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	True

Where do Goals and Exit Criteria get data?

Journey/Event data OR Contact Builder. It is all defined in the goal and/or exit criteria.

Journey Data

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	

Note: Data Extension must exist in an attribute group.



49%

93

Journey Data vs. Contact Data: Decision Splits



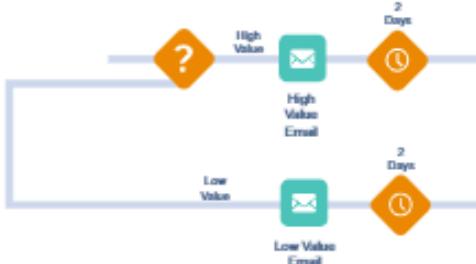
Entry Data Extension

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	True

Where do decision splits get data?

Journey/Event data OR Contact Builder. It is all defined in decision split.

CustomerID	1234567
FirstName	Rachel
LastName	Morris
myNTO	



94



Canvas Activities

Message Activities

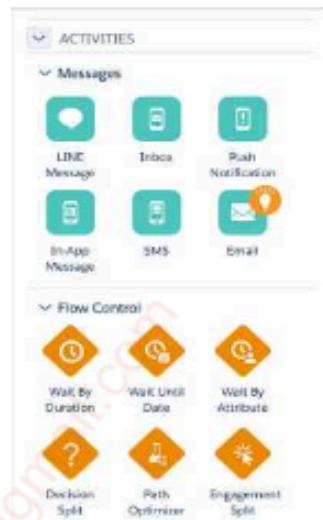
Content sent to Contacts who meet the criteria set within an Activity.

Flow Control

Activities that determine when and where a customer goes.

Customer Updates

Allow data to be updated during the Journey.



95



Using Data to Power Journeys

Journey Data

- Data in the Entry Source.
- A snapshot of the data for a subscriber when they enter the journey.
- Journey Data is static data.
- Personalization Strings and Dynamic Content default to Journey Data.
- If your data is dynamic, using Journey Data is not optimal.

Contact Data

- Data is stored in Contact Builder in the Contacts Data Model.
- Data is dynamic.
- Use AMPscript to populate emails with data and content related to Contact Data.

96

Join Me



6-9: Configure Messaging and Flow Control Activities

Goal:

Configure the Welcome Series messages and wait activities.



97

Tasks:

1. Configure the Send Email Activities for all 3 emails.
2. Configure the Wait by Duration Activities.

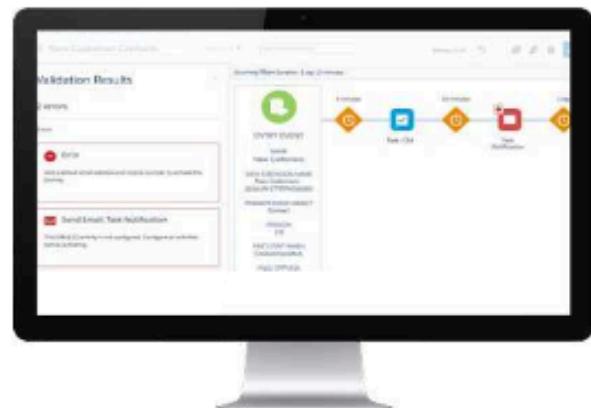
Validation and Activation



Validate to confirm that the entry sources, settings, activities, goals, and exit criteria are set up to work as planned.

When the validation tool detects errors, the results show as error messages.

- Errors and configuration issues appear in the results drawer.
- Multiple errors for the same activity appear in the same error tile.
- Activities that require attention are highlighted on the canvas.



98