



Molengeek International

SALESFORCE

CLOUD

Table of contents

General Program Information	3
Program Objectives and Description	4
Structure and Modules	6
Delivery Methods and Tools	8
Localization and Adaptation	10
Section 6: Outcomes and Evaluation	11
Supporting Materials	12
Conclusion	13
Introduction : Comprehensive Guide to Marketing Automation	15
Chapter 1 : Marketing Cloud	21
1. Audience Builder	21
2. Contact Builder	25
3. Content Builder	29
4. Journey Builder	31
5. Advertising Studio	35
6. Mobile Studio	37
7. Email Studio	39
8. Automation Studio	52
9. Analytics Builder	56
10. Einstein	57
11. AppExchange	59
12 . Marketing Cloud Administration	61
Chapter 2 : CRM	63
13. Salesforce CRM	63
13.2 Service Cloud	69

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

General Program Information

Program Title: Salesforce Training

The program is officially titled “Salesforce Training”. It provides participants with the theoretical and practical knowledge necessary to operate effectively within the Salesforce ecosystem, including CRM, Marketing Cloud, Sales Cloud, and Service Cloud modules. The program prepares learners for professional certification and equips them with practical skills relevant to customer relationship management, digital marketing, and cloud-based business solutions.

Organisation: MolenGeek

The Salesforce Training is organised and delivered by MolenGeek, an international educational organisation committed to making technology and digital careers accessible to everyone. MolenGeek focuses on inclusive learning and practical upskilling for reskillers, NEETs, and job seekers, promoting equal access to IT education regardless of background or prior experience.

Country / Local Context: Belgium, France, Italy, and Morocco

The program operates across MolenGeek hubs in Belgium (Brussels, Antwerp), France (Roubaix), Italy, and Morocco. It addresses the growing demand for professionals trained in CRM, data-driven marketing, and cloud-based business technologies. Through a combination of physical training sessions and online learning, MolenGeek ensures that participants from diverse regions can access the training equally and flexibly.

Target Audience: Reskillers, job seekers, and underrepresented talent

The Salesforce Training is designed for individuals from all educational and professional backgrounds, especially those seeking to transition into IT, marketing automation, or CRM-related roles. The program welcomes NEETs and individuals with limited technical experience, prioritising motivation, engagement, and learning potential over formal qualifications.

Language(s) of Delivery: English, French, and Dutch

The program is conducted in three languages—English, French, and Dutch—to ensure accessibility and inclusivity across MolenGeek’s international hubs. All course materials, exercises, and evaluations are provided in English, while live sessions and mentorship are delivered in the participant’s preferred language (English, French, or Dutch).

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Accessibility and Delivery Mode: The Salesforce Training follows a blended learning model combining online self-paced modules with instructor-led workshops, collaborative peer learning, and project-based activities. Participants can attend classes physically at MolenGeek hubs or remotely through the Molearning platform. This flexible structure ensures that all learners—regardless of location or personal circumstances—can fully participate and engage with the course content.

Program Objectives and Description

Overall Goal of the Program:

The overarching goal of the Salesforce Training is to equip participants with the fundamental knowledge, technical proficiency, and business understanding required to work confidently within the Salesforce ecosystem. The program introduces learners to Customer Relationship Management (CRM) concepts, marketing automation, data analytics, and service management within the Salesforce platform. It serves as a direct pathway to employability or further certification, empowering participants to pursue professional credentials such as Salesforce Administrator or Marketing Cloud Specialist. The ultimate aim is to increase digital literacy and workforce readiness in the field of cloud-based customer management solutions.

Specific Learning Objectives:

Upon completion of the program, participants will be able to:

- Understand the fundamental principles of CRM and how Salesforce supports business operations across sales, service, and marketing domains.
- Navigate the Salesforce interface, manage accounts and contacts, and configure dashboards and reports.
- Use key Salesforce modules such as Sales Cloud, Service Cloud, and Marketing Cloud to automate workflows and enhance customer engagement.
- Apply basic data analysis and visualization techniques to extract business insights.
- Collaborate effectively in digital environments using communication and project management tools.
- Demonstrate professional and soft skills including communication, problem-solving, and teamwork within a digital business context.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Prepare for industry-recognized Salesforce certifications (Salesforce Administrator, Marketing Cloud Specialist, or similar credentials).

Brief Overview of Curriculum Topics:

The curriculum integrates both theoretical instruction and practical exercises designed to reflect real-world Salesforce use cases. Key topics include:

- Introduction to CRM Concepts – Understanding customer data, relationship management, and data-driven decision-making.
- Salesforce Platform Fundamentals – Overview of the Salesforce environment, navigation, data models, and architecture.
- Sales Cloud – Managing opportunities, leads, and pipelines; automation tools for sales teams.
- Service Cloud – Case management, knowledge base configuration, and customer support tools.
- Marketing Cloud – Email campaigns, customer journeys, segmentation, and performance analytics.
- Salesforce Analytics – Dashboards, reports, KPIs, and data visualization.
- Integration & Automation – Workflows, approval processes, and third-party integration via APIs.
- Career & Certification Preparation – Guided sessions for certification readiness and professional branding on LinkedIn.

Duration (Total Hours / Weeks):

The Salesforce Training typically spans 12 to 14 weeks, equivalent to approximately 280 learning hours. This includes instructor-led workshops, practical assignments, project-based learning, and career development sessions. Learners also have extended access to digital learning materials and recorded sessions through the Molearning platform.

Prerequisites (Knowledge, Experience):

There are no formal educational prerequisites to join the Salesforce Training. The course is open to all motivated participants with basic computer literacy and a strong desire to pursue a digital career. Previous experience in business, marketing, or IT can be beneficial but is not required. Selection is based on motivation, commitment, and the ability to engage in full-time training.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Structure and Modules

The Salesforce Training program is structured into concise, interconnected modules covering CRM fundamentals, Sales, Service, and Marketing Clouds, Analytics, and Certification Preparation. Each module combines theory, practice, and teamwork to build both technical and professional competencies.

Table: Salesforce Training – Module Overview

Module / Component	Key Topics / Activities	Learning Method	Intended Outcomes
Module 1: Introduction to CRM and Salesforce Fundamentals	• CRM principles and business value • Overview of Salesforce ecosystem • Data structures and user navigation • Account, contact, and lead management	Instructor-led sessions, self-paced exercises, demonstrations	Participants understand CRM fundamentals and can navigate the Salesforce platform, manage basic data entities, and explain how CRM supports sales and customer engagement.
Module 2: Sales Cloud Essentials	• Sales processes and opportunity management • Pipeline tracking and forecasting • Automation of sales workflows • Building and customising dashboards and reports	Workshops, real-case exercises, sandbox practice	Learners can configure Sales Cloud to streamline sales operations, automate workflows, and interpret key metrics through custom reports and dashboards.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Module 3: Service Cloud and Customer Support	• Case management and escalation • Knowledge base and self-service portals • Omnichannel customer support • Service metrics and automation	Guided labs, simulations, and group exercises	Participants gain proficiency in using Service Cloud for efficient case handling and learn to deliver quality support through digital channels and automation tools.
Module 4: Marketing Cloud and Campaign Management	• Email marketing and campaign creation • Customer segmentation and journey mapping • Data integration and audience analytics • KPI tracking and performance optimisation	Hands-on workshops, projects, and case studies	Learners design and execute multi-channel marketing campaigns using Marketing Cloud tools and learn to interpret analytics for decision-making and customer engagement improvement.
Module 5: Salesforce Analytics and Reporting	• Dashboard creation and customisation • Advanced reporting tools • Data visualisation and storytelling • Business intelligence and performance indicators	Project-based assignments and instructor feedback	Participants can create interactive dashboards and reports, communicate insights effectively, and use analytics to support business strategy.

Module 6: Integration, Automation, and App Development	• Workflow rules and process automation • Integration via APIs and AppExchange • Custom app creation using declarative tools • Security and access management	Instructor demonstrations, sandbox environment practice	Learners implement automation tools, integrate third-party applications, and understand security fundamentals within the Salesforce environment.
Module 7: Career Preparation and Certification Readiness	• Soft skills development and teamwork • LinkedIn and CV workshops • Mock certification tests (Administrator & Marketing Cloud) • Guidance on professional portfolio building	Career workshops, mentorship, certification practice exams	Participants complete the program with a career plan, professional portfolio, and readiness for Salesforce certification exams.

This structure ensures a clear learning progression from basic CRM concepts to advanced Salesforce applications. All modules integrate practice-based learning and collaborative exercises, concluding with career preparation and certification readiness.

Delivery Methods and Tools

Mode of Delivery:

The Salesforce Training follows a blended learning approach, combining both in-person and online sessions. Participants can attend classes at MolenGeek hubs or connect remotely through the Molearning platform. This structure allows flexibility for learners while ensuring the same quality of instruction and access to resources.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Digital Tools and Platforms:

- Molearning – MolenGeek’s proprietary e-learning platform hosting all course materials, video lectures, and progress tracking.
- Salesforce Sandbox – a secure environment for hands-on exercises in CRM, Sales, Service, and Marketing Clouds.
- Slack – for daily communication, peer collaboration, and support.
- Trello – for project planning and team coordination.
- Zoom or Google Meet – for live workshops, Q&A sessions, and mentoring.
- GitHub – for sharing group projects and maintaining version control during collaborative work.

Teaching Methods:

The program uses a dynamic, hands-on pedagogical model inspired by MolenGeek’s practical learning philosophy. Participants alternate between guided lessons, individual assignments, and group projects. Core methodologies include:

- Instructor-led workshops and live demonstrations.
- Project-based learning and problem-solving case studies.
- Peer learning and collaborative exercises via Slack channels.
- One-on-one mentoring and continuous feedback sessions.
- Industry guest lectures focusing on real-world Salesforce implementations.

Assessment Methods:

The assessment strategy focuses on continuous learning and skill application rather than formal exams. Learners are evaluated through:

- Practical assignments and sandbox exercises.
- Team projects assessed on creativity, collaboration, and problem-solving.
- Short quizzes to reinforce key concepts.
- Instructor and peer feedback on progress.
- Mock certification tests to prepare for Salesforce Administrator or Marketing Cloud exams.

This delivery framework promotes flexibility, inclusion, and professional readiness. By integrating digital tools and collaborative methods, participants acquire not only technical Salesforce expertise but also the teamwork and adaptability required in modern digital workplaces.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Localization and Adaptation

The Salesforce Training program has been developed and continuously refined within MolenGeek's ecosystem, with a strong focus on accessibility, multilingual delivery, and adaptability to different regional contexts. The course combines global Salesforce standards with local employability needs, ensuring relevance across markets.

Localization Context:

The program is available in Belgium, France (Roubaix), Italy, and Morocco, with content tailored to each country's technological ecosystem. It is delivered in three languages—French, Dutch, and English—allowing participants from diverse backgrounds to fully engage in learning. This multilingual approach fosters inclusivity and prepares learners for the international nature of the Salesforce job market.

Adaptation to Local Needs:

- **Labor Market Alignment** – The curriculum integrates modules based on local demand for Salesforce specialists, including CRM, Marketing Cloud, and automation skills.
- **Partnerships** – Collaboration with regional companies and Salesforce partners ensures practical alignment and job placement opportunities.
- **Pedagogical Adjustments** – Each hub adapts examples, projects, and case studies to local industries such as telecom, finance, and retail.
- **Soft Skills Integration** – Additional workshops emphasize communication and cross-cultural collaboration to prepare participants for global roles.
- **Continuous Updates** – The program evolves with Salesforce's latest features and market shifts, ensuring ongoing relevance.

Cultural and Operational Adaptations:

Training materials and exercises are localized not only linguistically but also contextually. Case studies and practical assignments use region-specific business scenarios to strengthen cultural and professional applicability. MolenGeek's teaching methodology—based on 'learning by doing'—remains the foundation across all locations, while local trainers adapt examples and references to match their learners' environment.

Collaboration and Knowledge Sharing:

MolenGeek encourages cross-hub collaboration between Belgium, France, Italy, and

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Morocco to exchange best practices and teaching innovations. This cross-border approach allows trainers to share expertise, align learning outcomes, and build a unified yet adaptable Salesforce education framework.

Through its multilingual, locally adapted, and industry-aligned structure, the Salesforce Training program exemplifies how MolenGeek translates global technological standards into accessible opportunities for diverse learners. This localization model strengthens both employability and innovation across its international network of learning hubs.

Outcomes and Evaluation

Number of Participants Trained:

Since its introduction, the Salesforce Training program at MolenGeek has trained 58 participants across multiple cohorts. Each participant engaged in an intensive, hands-on curriculum combining theory, practice, and mentorship from industry professionals.

Completion / Certification Rate:

The program reports an average completion and certification rate of 85%. Successful graduates obtain the Salesforce Certified Administrator or Salesforce Marketing Cloud certification, depending on their specialization and project focus. These certifications validate technical competence and provide access to a strong professional network within the Salesforce ecosystem.

Post-training Outcomes:

Approximately 73% of graduates transition into employment or internships within six months after completing the program. Common career pathways include roles such as Junior Salesforce Administrator, CRM Analyst, or Marketing Automation Specialist. Graduates benefit from ongoing access to the SideGeek platform—developed by MolenGeek—which connects them to partner companies seeking trained Salesforce talent.

Participant Feedback Summary:

Feedback from participants highlights the program's practical orientation, mentorship quality, and industry relevance. Learners appreciate the project-based approach, the supportive learning environment, and the opportunity to apply skills in real business scenarios. Several graduates emphasize how the hands-on Salesforce Sandbox and collaborative peer learning significantly improved their confidence and job readiness.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Lessons Learned and Suggestions for Future Improvement:

- Maintaining small cohort sizes ensures personalized support and higher success rates.
- Continued alignment with employer needs helps secure internships and jobs more efficiently.
- Expanding mentorship opportunities with certified Salesforce professionals enhances learners' professional growth.
- Regular curriculum updates in sync with Salesforce product evolutions keep the content current and market-relevant.
- Strengthening connections between the training program and SideGeek further increases graduate visibility and employability.

The Salesforce Training at MolenGeek has proven to be a strong entry point into the CRM and cloud ecosystem. Its combination of technical depth, professional guidance, and employment pathways through SideGeek ensures that learners not only earn certifications but also build sustainable careers in the digital economy.

Supporting Materials

This section provides an overview of the core and supplementary learning materials, digital platforms, and resources used throughout the Salesforce Training program. These resources are designed to support both in-class and self-paced learning while ensuring alignment with Salesforce's global certification standards.

List of Supporting Documents, Platforms, and External Resources:

- Official Program Page: <https://molengeek.education/en>
- Molearning E-learning Platform: hosts all lectures, exercises, and progress dashboards.
- Salesforce Trailhead: official Salesforce learning platform for modules, projects, and guided certifications.
- Salesforce Sandbox: hands-on training environment for real-world CRM, Sales, and Marketing Cloud simulations.
- Slack Workspace: peer-to-peer communication, project discussions, and support channels.
- Trello: used for group projects, sprint planning, and progress tracking.
- SideGeek Platform: MolenGeek's proprietary career and employer-connection tool linking graduates to job opportunities.
- GitHub Repositories: collaborative space for storing group project code and documentation.
- Guest Lecture Slides: presentations delivered by industry experts and Salesforce professionals.
- Workshop Materials: hands-on activities and real-case business simulations.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Certification Preparation Kits: mock exams, quizzes, and study guides aligned with Salesforce Administrator and Marketing Cloud certifications.

Access and Usage Notes:

All participants receive individual Molearning accounts at the start of the program. Through this portal, learners can access course content, exercises, and progress analytics. Trailhead modules are integrated into the curriculum, and completion badges are monitored by MolenGeek coaches. Peer collaboration via Slack and Trello ensures that learning extends beyond the classroom, while SideGeek provides long-term access to employment resources after graduation.

Together, these materials and tools form a complete learning ecosystem that combines theory, practice, and employability. They ensure that every participant gains not only Salesforce certification readiness but also the collaborative and problem-solving skills needed to succeed in professional environments.

Conclusion

The Salesforce Training program at MolenGeek represents a powerful bridge between education and employment in the digital economy. By combining high-quality technical instruction with hands-on projects, professional mentoring, and personalized career guidance, the program empowers participants to acquire both the technical and soft skills required for success in the Salesforce ecosystem.

MolenGeek's practical learning approach—centered on 'learning by doing'—ensures that participants not only understand theoretical concepts but can also apply them effectively in real-world business contexts. The program's multilingual delivery in French, Dutch, and English enables a highly inclusive learning environment that welcomes participants from diverse cultural and educational backgrounds.

Through the integration of Salesforce Trailhead, Sandbox environments, and the Molearning platform, learners gain authentic experience with tools used by global companies. The strategic partnerships with Salesforce and local employers, along with the dedicated SideGeek platform developed by MolenGeek, create a direct link between training and job

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

opportunities. Graduates are therefore well-positioned to transition smoothly into roles such as Junior Salesforce Administrator, Marketing Cloud Specialist, or CRM Consultant.

The ongoing success of the Salesforce Training program reflects MolenGeek's commitment to bridging the digital skills gap and fostering inclusive innovation. As the Salesforce ecosystem continues to expand, MolenGeek remains dedicated to evolving its curriculum, strengthening employer partnerships, and ensuring that learners from all backgrounds can thrive in the global digital workforce.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Introduction : Comprehensive Guide to Marketing Automation

Introduction to Marketing Automation

Marketing automation has revolutionized the way businesses approach digital marketing, offering a sophisticated blend of technology and strategy to automate repetitive tasks, personalize customer interactions, and drive efficiencies across marketing channels. At its essence, marketing automation is about nurturing relationships with customers and prospects with the right message, at the right time, through the preferred channel, thereby enhancing the customer experience and optimizing marketing efforts for higher ROI.

Evolution of Marketing Automation

The journey from manual marketing campaigns to automated processes reflects the evolution of technology and changing consumer behaviors. Initially, businesses relied heavily on email blasts and generic content. However, as digital platforms proliferated and consumer expectations for personalization grew, the need for a more sophisticated, data-driven approach became evident. Today, marketing automation platforms (MAPs) integrate with various digital channels and data sources, enabling marketers to create highly targeted campaigns, nurture leads through sales funnels, and deliver personalized content at scale.

The Pillars of Marketing Automation

- **Email Marketing:** The backbone of most marketing automation strategies, email marketing, has evolved from mass mailings to segmented, personalized communications triggered by specific customer actions.
- **Lead Management:** From lead capture to scoring and nurturing, managing leads through automated workflows ensures that prospects are engaged according to their interests and behaviors, increasing the likelihood of conversion.
- **Multi-Channel Campaign Management:** Automating campaigns across email, social media, SMS, and web allows businesses to reach customers where they are most active and maintain a consistent brand message across channels.
- **Analytics and Reporting:** Key to understanding campaign performance, analytics, and reporting tools within marketing automation platforms offer insights into customer behavior, campaign effectiveness, and overall marketing ROI.

Implementing Marketing Automation Successfully

Choosing the Right Marketing Automation Platform

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

The selection of a marketing automation platform is critical to the success of your digital marketing strategy.

Considerations should include:

- **Integration Capabilities:** The ability to integrate with CRM systems, social media platforms, and other marketing tools to provide a unified view of customer interactions.
- **Scalability:** The platform should grow with your business, accommodating an increasing number of contacts, more sophisticated segmentation, and additional channels over time.
- **User-Friendliness:** The user interface should be intuitive, allowing marketers to create campaigns, workflows, and reports without extensive technical knowledge.
- **Compliance and Security:** Ensuring that the platform complies with data protection regulations like GDPR and provides robust data security measures.

Setting Up for Success

Data Organization and Hygiene: Clean, well-organized data is the foundation of effective marketing automation. Regularly clean data to remove duplicates and inaccuracies, ensuring segmentation and personalization efforts are based on reliable information.

Developing a Content Strategy: Content is at the heart of marketing automation. Develop a content strategy that aligns with customer needs, interests, and behaviors at different stages of the buyer's journey.

Segmentation and Personalization: Use customer data to segment your audience into meaningful groups and personalize content to address their specific needs, interests, and behaviors, enhancing engagement and conversion rates.

Advanced Marketing Automation Strategies

1. Lead Scoring and Progressive Profiling

Lead Scoring Models: Develop models to assign scores to leads based on their demographic information and interaction with your marketing efforts. This helps prioritize leads that are most likely to convert, allowing sales teams to focus their efforts more effectively.

Progressive Profiling: Implement progressive profiling techniques to gradually collect more information about prospects through form submissions and interactions. This approach minimizes barriers to initial engagement while enriching lead data over time.

2. Cross-Channel Marketing Automation

Unified Customer View: Ensure your marketing automation platform integrates data across all customer touchpoints, providing a 360-degree view of customer interactions. This unified view enables more coherent and consistent messaging across channels.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Channel-Specific Strategies: Tailor your automation strategies to the unique characteristics of each channel. For example, SMS might be best for timely reminders, while email could be more effective for in-depth content delivery.

3. Leveraging AI and Machine Learning in Marketing Automation

The integration of artificial intelligence (AI) and machine learning (ML) technologies has opened new frontiers in marketing automation, offering unprecedented capabilities for personalization, predictive analytics, and efficiency.

Personalization at Scale

AI-Driven Content Personalization: Use AI to dynamically personalize content for each user based on their past behavior, preferences, and predicted interests. This could range from product recommendations to personalized email subject lines.

Predictive Analytics

Customer Behavior Prediction: Implement ML algorithms to predict future customer behaviors, such as the likelihood of purchase, potential for churn, or lifetime value. These insights can inform targeted interventions to nurture leads or retain customers.

Automation Optimization

Optimizing Marketing Campaigns: Utilize AI to test and refine marketing campaigns continuously. Machine learning can identify the most effective combinations of content, timing, and channel for different segments, continually improving campaign performance.

Analytics, Reporting, and Continuous Improvement

To maximize the benefits of marketing automation, it's essential to measure, analyze, and iterate on your efforts continually.

Key Performance Indicators (KPIs)

Defining Relevant KPIs: Establish clear, measurable KPIs that align with your marketing objectives, such as conversion rates, engagement rates, or return on investment (ROI).

Real-Time Dashboard: Utilize dashboards to monitor these KPIs in real-time, enabling quick adjustments to campaigns and strategies as needed.

General Marketing Automation KPIs

- Open Rate: The percentage of recipients who opened an email, indicating the effectiveness of your subject lines and the interest level of your audience.
- Click-Through Rate (CTR): The percentage of email recipients who clicked on one or more links contained in an email, reflecting the relevance and appeal of the content.
- Conversion Rate: The percentage of recipients who completed a desired action (e.g., making a purchase, signing up for a webinar) after clicking on a link in the email or message.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Bounce Rate: The percentage of emails that could not be delivered to the recipient's inbox, categorized into soft bounces (temporary delivery issues) and hard bounces (permanent failures).
- Unsubscribe Rate: The rate at which recipients are unsubscribing from your email list, indicating their interest in continuing to receive your communications.
- List Growth Rate: The rate at which your email list is growing, accounting for new subscriptions minus unsubscribes and email bounces.
- Engagement Rate: A broader measure of how engaged recipients are with your emails, considering opens, clicks, social shares, and other interactions.
- Spam Complaint Rate: The percentage of recipients who marked your email as spam, which can negatively affect your sender reputation.

Campaign-Specific KPIs

- Lead Generation Rate: The effectiveness of campaigns in generating new leads, measured by the number of leads acquired divided by the total number of visitors or interactions.
- Lead Nurturing Conversion Rate: The success rate of moving leads from one stage of the sales funnel to the next, culminating in a sale or other conversion event.
- Revenue Generated: The total revenue attributed to a specific marketing automation campaign, crucial for calculating ROI.
- Return on Investment (ROI): The financial return on the campaign compared to its cost, calculated as $(\text{Gain from Investment} - \text{Cost of Investment}) / \text{Cost of Investment}$.
- Cost Per Lead (CPL): The total cost of running the campaign divided by the number of leads generated, indicating the cost-effectiveness of the campaign in lead generation.
- Customer Lifetime Value (CLTV) Increase: The change in projected revenue from a customer over the course of their relationship with your company as a result of the campaign.
- Social Engagement Metrics: For campaigns involving social media, metrics such as likes, shares, comments, and followers can indicate the campaign's effectiveness in engaging audiences on social platforms.
- Website Traffic Metrics: The impact of campaigns on driving traffic to your website, measured by metrics such as total visits, new vs. returning visitors, and page views.
- Event Attendance Rate: For campaigns promoting events, the percentage of invitees who attend the event.
- Survey Response Rate: For feedback and survey campaigns, the percentage of recipients who complete the survey.

A/B Testing and Experimentation

Systematic Testing: Conduct A/B tests on various elements of your marketing campaigns, including email subject lines, call-to-action buttons, or landing page designs, to discover what resonates best with your audience.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Iterative Learning: Apply the insights gained from testing and analytics to continuously refine your marketing automation strategies, ensuring they remain effective and responsive to customer preferences and behaviors.

In summary

Marketing automation represents a comprehensive approach to engaging customers more effectively, streamlining marketing operations, and driving better business outcomes.

By understanding and applying the principles of marketing automation, from foundational concepts to advanced strategies incorporating AI and ML, businesses can create more personalized, engaging, and successful marketing campaigns. As technology continues to evolve, so too will the capabilities of marketing automation, offering new ways to connect with customers and create memorable brand experiences.

Now that we've taken a theoretical look at marketing automation, let's move on to the practical side: what do proven marketing automation campaigns actually look like?

Examples of Marketing Automation Campaigns

1. Welcome Email Series

Purpose: To engage new subscribers by introducing them to your brand and setting the stage for future communications.

Steps:

- Subscriber signs up through a website form.
- Automated welcome email is sent immediately, thanking the subscriber for signing up and introducing the brand.
- A series of emails follow, providing valuable content, brand story, and product highlights over several days.

KPIs: Open rate, click-through rate (CTR), conversion rate, unsubscribe rate.

2. Lead Nurturing Campaign

Purpose: To move leads through the sales funnel by delivering targeted content that addresses their specific needs and interests.

Steps:

- Leads are segmented based on their interactions with your website or other content.
- A series of personalized emails are sent, each designed to address the lead's stage in the buying process.
- Engagement with these emails triggers subsequent actions, such as a sales team follow-up or additional targeted content.

KPIs: CTR, conversion rate, time to conversion, sales qualified leads (SQLs) generated.

3. Abandoned Cart Reminder

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Purpose: To recover potential sales by reminding customers of items left in their shopping cart.

Steps:

- Customer adds items to the cart but exits without completing the purchase.
- An automated email is sent after a set period, reminding the customer of their abandoned cart and encouraging them to complete their purchase.
- Follow-up emails may be sent if the first reminder is ignored, possibly including a discount offer as an incentive.

KPIs: Recovery rate, overall conversion rate, average order value.

4. Event Promotion and Follow-Up

Purpose: To increase event attendance and engage attendees before and after the event.

Steps:

- Targeted invitation emails are sent to a segmented list of contacts likely interested in the event.
- Automated reminders are sent as the event date approaches.
- Post-event emails thank attendees, provide access to event materials, and offer next steps for engagement.

KPIs: Attendance rate, engagement rate with post-event content, follow-up conversion rate.

5. Birthday or Anniversary Campaign

Purpose: To foster customer loyalty by celebrating personal milestones with personalized offers or messages.

Steps:

- Customer birthdates or sign-up anniversaries are captured in the customer database.
- An automated, personalized email is sent on these dates, offering a special discount or gift.
- Follow-up communication thanks customers for using their special offer and encourages further engagement.

KPIs: Redemption rate of offers, engagement rate, repeat purchase rate.

6. Re-engagement Campaign

Purpose: To re-engage inactive subscribers or customers by reigniting their interest in your brand.

Steps:

- Segment inactive users based on their last engagement date.
- Send a personalized email expressing that you've missed them and offering an incentive to return.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Depending on the response, follow up with tailored content to encourage re-engagement.

KPIs: Re-engagement rate, unsubscribe rate, conversion rate post-re-engagement.

7. Customer Feedback Survey

Purpose: To collect valuable feedback from customers to improve products and services.

Steps:

- After a purchase or interaction, send an automated email thanking the customer and requesting feedback via a survey link.
- Follow up with customers who haven't completed the survey, reminding them of its value.
- Analyze feedback and send a final thank-you email, possibly including a discount code as a token of appreciation.

KPIs: Survey completion rate, positive feedback rate, improvement in customer satisfaction scores.

8. Upsell or Cross-Sell Campaign

Purpose: To increase revenue by suggesting relevant additional purchases that complement what the customer has already bought.

Steps :

- Analyze customer purchase history and preferences to identify upsell or cross-sell opportunities.
- Send personalized product recommendations based on this analysis.
- Follow up based on customer interaction with the initial recommendation.

KPIs: Conversion rate on recommended products, average order value, customer lifetime value (CLTV).

Chapter 1 : Marketing Cloud

This course is complementary with the Trailhead Trailmix I've created. Don't hesitate to study on the 2 supports.

<https://trailhead.salesforce.com/fr/users/sinan57/trailmixes/sfmc-molengeek-by-sinan>

"Embark on a journey with Salesforce Marketing Cloud, where data meets creativity, empowering marketers to weave personalized narratives across every digital touchpoint."

Introduction to Salesforce Marketing Cloud

Welcome to the world of Salesforce Marketing Cloud (SFMC), a comprehensive suite designed to empower marketers with data-driven tools and insights for creating personalized, impactful customer journeys. SFMC provides an integrated platform for email

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

marketing, mobile messaging, social media management, and digital advertising, alongside powerful analytics and data management capabilities. Whether you're looking to enhance customer engagement, improve campaign performance, or drive meaningful conversations at scale, Salesforce Marketing Cloud offers the solutions and flexibility to turn every marketing vision into reality.

1. Audience Builder

« Welcome to Audience Builder, the tool that will create your audiences, find look-a-likes and allow you to build audiences »

In Marketing Cloud Audience Builder, there are various methods available to segment your subscribers effectively. By utilizing advanced segmentation, you can enhance the precision of your email campaigns while gaining immediate and more profound insights into your customers' characteristics and actions. It's important to note that Audience Builder is compatible with all types of Marketing Cloud accounts. Moreover, for Enterprise 2 configurations, Audience Builder offers additional functionalities such as business unit filters. To enable this feature for your account, please get in touch with your Marketing Cloud account representative.

Audiences in this context refer to groups of contacts categorized based on specific attributes, which are utilized when sending messages. These audiences are derived from a sendable data extension, with Audience Builder marking the data extension as an audience by setting a flag in its header. Outbound Mail Manager (OMM) uses this information to determine which channel, audience, and segment engaged the contact with a message.

You have the option to publish an audience for use in email sends or other related activities. Audience Builder can seamlessly incorporate lists, groups, or data extensions linked through a common subscriber key or ID. It's worth mentioning that you can augment attributes in Audience Builder without adding further dimensions to them. However, please be aware that Audience Builder exclusively supports queries executed through the expression builder.

Audiences can include both IDs and code values, each serving distinct purposes:

- IDs and Codes represent separate entities.
- Audience Builder mandates the use of IDs, whereas Codes are optional values.
- IDs serve as unique identifiers for audience objects, facilitating reporting and tracking activities. These values are essential for audience and segment management.
- The Summary screen may display a field labeled "Audience ID," but it essentially shows a code value.
- Codes do not necessitate unique values, allowing you to use relevant values as codes.
- Codes can assist in the management and association of an audience with a specific campaign.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

For your convenience, Audience Builder lists its activities in Automation Studio under Data Factory and the Audience Builder Folder. To select an audience for updating, you can utilize the "Build Audience" activity.

Segments are essentially groups of individuals who satisfy a specific set of criteria defined by the user. These segments are valuable for both analysis and targeting within an audience. If you opt not to include a filter, Audience Builder will create segments using the entire pool of contacts available in your account. It's important to note that audiences do not necessarily require segments or audience filters.

In the Publish tab, you have the capability to add attributes to segments. This process associates contact content with a particular segment. Additionally, you can utilize AMPscript and Server-Side JavaScript to drive content decisions in your emails. These actions are based on a contact's segment assignment within a specific audience.

When it comes to reporting, audiences and segments play a crucial role. Audience Builder offers a report within the standard email reports section, breaking down campaign metrics by segment name, providing valuable insights into the performance of different segments.

Performance in Audience Builder can vary depending on the specific implementation. It's advisable to collaborate with your implementation team to gain a clear understanding of performance expectations tailored to your unique setup.

It's worth noting that systems handling a higher volume of instructions may take longer to complete tasks, but Audience Builder's analytical architecture allows for significantly faster processing compared to traditional systems. Complex queries that might time out on a conventional system can be executed in just seconds using this advanced architecture.

As a best practice, it is recommended to refresh Audience Builder data once a day. This refresh ensures that lists and data extensions are up to date, maintaining the accuracy of your segmentation and targeting efforts.

Deep Dive into Audience Builder's Capabilities

Audience Builder is not just a tool; it's a comprehensive ecosystem within Salesforce Marketing Cloud designed for the nuanced segmentation of customer data. Its capabilities are built around enhancing the precision of marketing campaigns through detailed data analysis and segmentation.

Core Functionalities

- **Unified Data Environment:** Audience Builder excels in creating a centralized data environment by aggregating data from disparate sources, offering a 360-degree view of customers.
- **Granular Segmentation:** Beyond basic demographic or behavioral segmentation, Audience Builder allows for granular segmentation using custom attributes, predictive scoring, and engagement patterns.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- **Seamless Integration:** It integrates seamlessly with other Salesforce products, ensuring that insights and segments directly feed into campaign management, personalization engines, and analytics tools.

Interface Components:

- **Data Sources Panel:** Here, users can add and manage the origin of the data that feeds into Audience Builder, ranging from Salesforce clouds to external databases.
- **Segment Builder Tool:** A visual tool allowing for the intuitive creation of segments through drag-and-drop functionality. Users can apply complex logical operations to define their audience precisely.
- **Insights Dashboard:** Offers a comprehensive overview of segment characteristics, performance metrics, and actionable insights generated in real-time.

Step-by-Step Guide to Creating Advanced Segments

1. Creating advanced segments involves leveraging both the breadth of data available and the sophisticated tools Audience Builder provides.
2. **Initiate a New Segment:** Begin by defining the objective of your segment. This clarity will guide the selection of criteria and data sources.
3. **Data Source Integration:** Integrate multiple data sources to ensure a rich dataset. This may involve linking external CRM data, web analytics, and transactional databases.
4. **Define Segmentation Criteria:** Use the Segment Builder Tool to specify your criteria. For advanced segmentation, combine demographic data, behavioral insights, and predictive analytics to create a dynamic and targeted segment.
5. **Apply Logical Operators:** For nuanced segmentation, apply logical operators (AND, OR, NOT) to refine your audience based on complex criteria.
6. **Utilize Predictive Analytics:** Incorporate predictive analytics to forecast future behavior or preferences, enhancing the segment's relevance and potential ROI.
7. **Test and Optimize:** Before finalizing, test your segment for size and relevance. Use the Insights Dashboard to analyze the segment's characteristics and potential impact.
8. **Activate and Monitor:** Once satisfied, activate the segment within your marketing campaigns. Continuously monitor performance and adjust criteria as needed for optimal engagement.

Advanced Strategies and Use Cases

Leveraging Audience Builder to its full extent means going beyond standard practices to implement strategies that can significantly impact marketing outcomes.

Cross-Channel Personalization

Develop segments specifically designed for cross-channel personalization. By understanding the unique behaviors and preferences of each segment, you can tailor content across email, social media, web, and mobile platforms, creating a cohesive and personalized customer journey.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Predictive Lifetime Value Segmentation

Use predictive analytics within Audience Builder to segment customers based on their predicted lifetime value. This allows for more focused retention efforts and personalized upsell and cross-sell campaigns to high-value segments.

Abandonment Recovery Campaigns

Create segments targeting users who have shown high engagement but stopped short of conversion. Implement targeted recovery campaigns, leveraging insights from Audience Builder to personalize the message and offer, encouraging them to complete their purchase or engagement.

Advanced Behavioral Segmentation

Go beyond basic behavioral data by integrating web analytics and mobile engagement data to understand nuanced behaviors. Create segments based on specific actions, such as app usage patterns or interaction with key web pages, to tailor communications that resonate deeply with user interests and behaviors.

Integration with Salesforce Ecosystem

Audience Builder's power is magnified when integrated with the broader Salesforce ecosystem. Utilize Journey Builder for automated, multi-step marketing campaigns tailored to each segment. Leverage Advertising Studio to extend your reach on social platforms directly targeting segments created in Audience Builder. Employ Analytics Builder for deeper insights into segment performance and campaign ROI.

Audience Builder in Salesforce Marketing Cloud stands as a testament to the power of data-driven marketing. Through its advanced segmentation capabilities, seamless integrations, and real-time insights, marketers and data analysts are equipped to craft personalized, impactful marketing campaigns like never before. This comprehensive guide aims to illuminate the path to mastery over Audience Builder, enabling marketing professionals to unlock unprecedented levels of customer engagement and business growth. By exploring the depths of Audience Builder's functionalities and applying the advanced strategies outlined, users can transform raw data into marketing gold, fostering connections that drive lasting customer loyalty and success.

Dominos Cards

Audience Builder

- A tool in Salesforce Marketing Cloud designed for segmenting and managing customer data, enabling marketers to create detailed audience segments for targeted marketing efforts.

Segmentation

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- The process of dividing a broad consumer or business market, normally consisting of existing and potential customers, into sub-groups of consumers based on some type of shared characteristics.

Data Integration

- The process of combining data from different sources into a single, unified view. Integration begins with the ingestion process and includes steps such as cleansing, ETL mapping, and transformation.

2. Contact Builder

“Contact Builder offers a foundation of data for forging deeper connections, enabling a 360-degree view of every customer journey across your marketing landscape »

Introduction to Contact Builder

Contact Builder is a powerful feature within SFMC that allows organizations to create a unified view of each customer by consolidating data from various sources into a single contact record. It provides the foundational data model for all marketing activities, enabling marketers to manage contacts, data relationships, attributes, and more.

Core Capabilities:

- **Data Management:** Centralizes customer data from multiple sources, including offline and third-party data, into a single view.
- **Attribute and Relationship Definition:** Allows users to define and manage attributes and relationships between different data sets, enhancing the ability to segment and target customers effectively.
- **Integration with Salesforce Ecosystem:** Ensures seamless data flow between SFMC and other Salesforce Clouds, enhancing the ability to create cohesive and personalized customer journeys.

Navigating Contact Builder

Contact Builder features an intuitive interface designed to simplify the complexities of data management.

Key components include:

- **Data Sources:** This section allows users to add and manage external and internal data sources, providing a comprehensive view of customer data.
- **Attribute Groups:** Users can create and manage groups of related data attributes, facilitating easier segmentation and targeting.
- **Contacts:** The central hub for viewing and managing individual contact records, including their attributes and related data.
- **Data Designer:** A visual tool for defining and managing the relationships between different sets of data, crucial for building complex, relational data models.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Building and Managing Contact Data

Effective use of Contact Builder revolves around the strategic organization and management of contact data, ensuring that marketing campaigns can be as personalized and targeted as possible.

1. **Define Your Data Model:** Begin by understanding the structure of your customer data. Define the attributes that are most relevant to your marketing efforts and how different data sets relate to each other.
2. **Import Data:** Use the Data Sources section to integrate data from Salesforce clouds, third-party CRM systems, and other external sources. This can include demographic information, transactional data, behavioral data, and more.
3. **Create Attribute Groups:** Organize related data attributes into groups. This could include grouping all attributes related to customer preferences or transaction history, making it easier to access and utilize this data for segmentation.
4. **Design Data Relationships:** Utilize the Data Designer to visually map out the relationships between different data sets. This could involve linking contact records with transactional data or creating hierarchical relationships between contacts and accounts.
5. **Manage Individual Contacts:** In the Contacts section, view and manage details of individual contacts. This includes editing contact attributes, viewing associated data, and understanding each contact's engagement across marketing channels.

Advanced Use Cases for Contact Builder

Leveraging Contact Builder to its fullest potential involves applying its capabilities to address complex marketing challenges and opportunities.

Unified Customer Profiles

Create comprehensive customer profiles by consolidating data from every touchpoint and interaction. These profiles serve as the foundation for personalized marketing campaigns, ensuring that every message is relevant to the individual's interests, behaviors, and preferences.

Segmentation and Targeting

Use the detailed data model created in Contact Builder to segment contacts based on a wide range of criteria. This enables highly targeted marketing campaigns that can be tailored to very specific audience segments, improving engagement and conversion rates.

Journey Integration

Integrate Contact Builder with Journey Builder to create personalized customer journeys based on the rich contact data available. Utilize data relationships and attributes to trigger specific journey paths, ensuring that each customer's experience is optimized based on their unique data profile.

Compliance and Data Management

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Ensure compliance with data privacy regulations by using Contact Builder to manage consent and preferences across contacts. Keep data up to date and accurate, minimizing the risk of non-compliance and enhancing the effectiveness of marketing communications.

Contact Builder in Salesforce Marketing Cloud is an essential tool for any organization looking to leverage customer data for personalized marketing. By providing a comprehensive platform for managing contact data, defining relationships, and integrating with the broader Salesforce ecosystem, Contact Builder enables marketers to understand their audience on a deeper level and create more effective, targeted marketing campaigns. This guide has aimed to provide a thorough overview of Contact Builder, from its core functionalities and interface to advanced use cases, empowering users to fully harness the power of their customer data for improved marketing outcomes. Through strategic application of Contact Builder's capabilities, organizations can transform their approach to customer engagement, fostering stronger relationships and driving significant business growth.

Let's Compare Audience & Contact Builder

Feature	Audience Builder	Contact Builder
Primary Purpose	Focuses on segmenting and managing customer data for targeted marketing efforts.	Manages individual customer data, relationships, and provides a unified customer view across Salesforce Marketing Cloud.
Key Capabilities	Advanced segmentation using a wide range of criteria. Integration of data from various sources for comprehensive audience profiles. Real-time audience updates for dynamic segmentation.	Creation and management of a unified data model in SFMC. Definition and visualization of data relationships. Access to detailed contact information and interaction history.
Data Management	Primarily used for segmenting large datasets into targeted lists for specific marketing campaigns.	Used for detailed data management, including creating and managing attributes, and relationships between data sets.
Use Cases	Creating highly targeted marketing segments for personalized campaigns. Analyzing audience data to inform marketing strategies.	Managing contact data integrity and relationships. Building a comprehensive view of customer interactions across channels.
Integration & Data Sources	Capable of integrating with external and Salesforce data sources for segmentation.	Focused on internal Salesforce data from various Clouds, emphasizing a single view of the customer within SFMC.

Feature	Audience Builder	Contact Builder
Target Users	Marketers focusing on audience segmentation, campaign targeting, and personalization.	Marketers and administrators needing to structure and access detailed customer data for cross-channel marketing.

Dominos Cards

Contact Builder

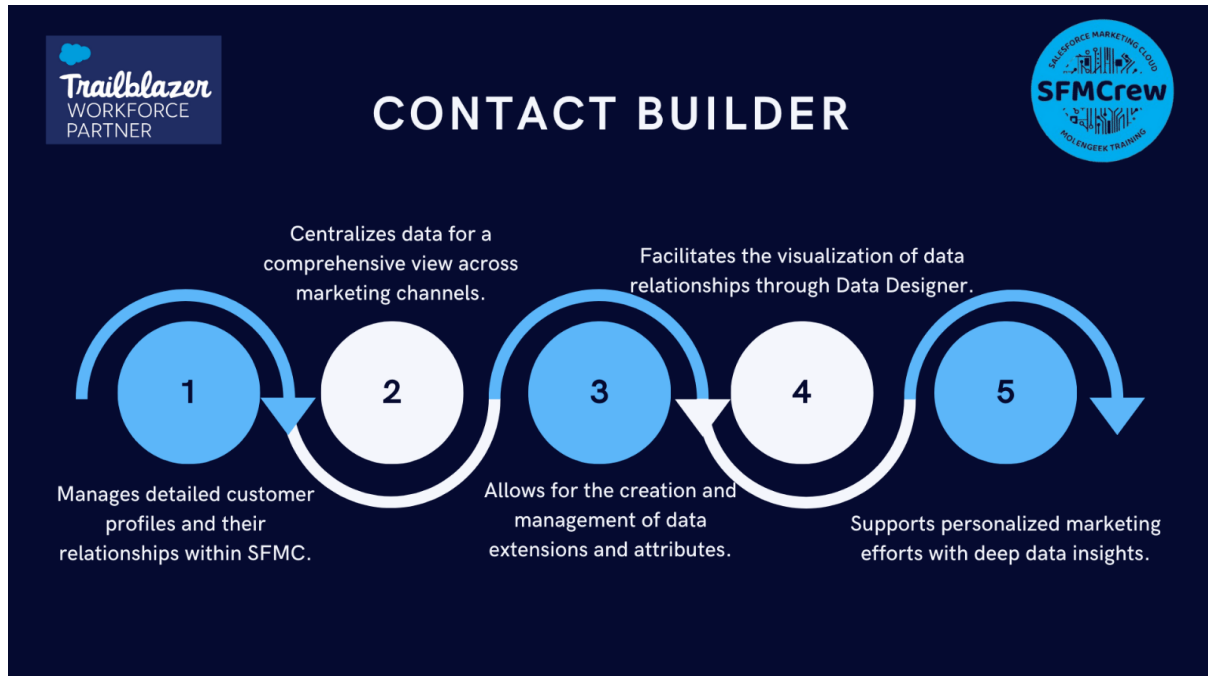
- A Salesforce Marketing Cloud tool that allows users to manage and view customer data from various sources within a unified interface, helping create a comprehensive view of each customer.

Attribute Groups

- Collections of related data attributes in Contact Builder, designed to enrich customer profiles and segmentation logic with demographic, behavioral, or transactional data points.

Data Designer

- A feature within Contact Builder used to define and manage the relationships between different sets of data, crucial for building complex, relational data models.



Molengeek International

Salesforce Cloud
KA220-VET-C971A987

3. Content Builder

“With Content Builder, unleash your creative potential to craft compelling, personalized content that resonates with your audience at every touchpoint.”

Introduction to Content Builder

Content Builder is a powerful feature within SFMC that provides marketers with the tools to create compelling, personalized content. It supports a wide array of content types, including emails, SMS messages, push notifications, and more, ensuring that marketers can engage with their audience effectively across multiple touchpoints.

Core Capabilities:

- **Intuitive Content Creation:** Offers a drag-and-drop interface, along with a library of templates, making it easy to create professional-quality content without the need for deep technical expertise.
- **Dynamic Content Personalization:** Enables the inclusion of personalized and dynamic content based on customer data, behavior, and preferences, enhancing the relevance and effectiveness of marketing communications.
- **Asset Management:** Centralizes the storage and management of digital assets, such as images, videos, and documents, facilitating easy access and reuse across marketing campaigns.
- **Content Optimization:** Provides tools for testing and optimizing content, including A/B testing and content analytics, to improve engagement and conversion rates.

Navigating Content Builder

The Content Builder interface is designed to be user-friendly, allowing marketers to efficiently manage their content creation and optimization processes.

Key components include:

- **Content Area:** The main workspace where users create and edit content. It supports various content formats and offers a range of customization options.
- **Template Library:** A collection of pre-designed templates that serve as starting points for creating content. Templates can be customized to fit brand guidelines and campaign objectives.
- **Asset Library:** A centralized repository for storing and organizing digital assets. It supports tagging and categorization for easy retrieval.
- **Preview and Test:** Tools for previewing content in various formats and conducting A/B tests to determine the most effective content variations.

Creating and Managing Content

To leverage Content Builder for impactful marketing campaigns, follow these steps:

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

1. **Start with a Template or Blank Canvas:** Choose a template from the library or start from scratch using the drag-and-drop editor. Templates can be a great time-saver and ensure consistency across campaigns.
2. **Customize Your Content:** Use the editor to add text, images, and other elements to your content. Customize the layout and design to match your brand's aesthetic and campaign goals.
3. **Incorporate Personalization:** Utilize dynamic content blocks and personalization strings to tailor the content to individual recipients. This can include personalized greetings, product recommendations, and other content variations based on customer data.
4. **Optimize and Test:** Before finalizing your content, use the preview and test features to see how it will appear on different devices and email clients. Conduct A/B testing to compare different versions of your content and identify the most effective approach.
5. **Manage Assets:** Use the Asset Library to organize your digital assets. Tag and categorize assets for easy access, ensuring that you can quickly find and reuse content components in future campaigns.

Advanced Strategies for Content Builder

Maximizing the potential of Content Builder involves exploring advanced content strategies and best practices.

Interactive and Responsive Design

Create interactive content that engages users and encourages interaction. This can include interactive images, polls, and surveys within emails. Ensure your content is responsive, providing an optimal viewing experience across all devices.

AI-driven Content Optimization

Leverage SFMC's AI capabilities, such as Einstein Content Selection, to dynamically choose the most relevant content for each recipient. This can significantly enhance content personalization and effectiveness.

Cross-channel Content Strategy

Develop a cohesive content strategy that spans multiple channels, ensuring consistent messaging and branding. Use Content Builder to adapt content for different platforms, maintaining a unified brand voice and customer experience.

Content Analytics and Insights

Utilize Content Builder's analytics tools to track the performance of your content across campaigns. Analyze engagement metrics, such as open rates and click-through rates, to gain insights into content effectiveness and audience preferences.

Content Builder in Salesforce Marketing Cloud empowers marketers to create, manage, and optimize marketing content with ease and efficiency. By providing an intuitive interface,

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

dynamic content personalization capabilities, and comprehensive asset management, Content Builder enables the delivery of highly relevant and engaging content to audiences across various channels. This guide has aimed to provide a detailed overview of Content Builder, from its fundamental features and interface to advanced content strategies, equipping users with the knowledge to fully leverage the tool for enhanced marketing outcomes. Through strategic use of Content Builder's functionalities, marketers can significantly improve their content's impact, driving deeper engagement, and fostering lasting connections with their audience.

Dominos Cards

Content Builder

- A powerful tool within Salesforce Marketing Cloud that provides a streamlined interface for creating, managing, and tracking personalized marketing content across multiple channels.

Dynamic Content

- Content that changes based on the audience's behaviors, preferences, or data attributes, enabling personalized communication in marketing campaigns.

Email Templates

- Pre-designed email layouts that can be used and customized within Content Builder to create consistent and effective email marketing campaigns quickly.

4. Journey Builder

"Journey Builder: Navigate the art of personalized customer journeys, crafting seamless & multicanal journeys that connect and convert with precision."

Journey Builder allows marketers to design, automate, and optimize customer journeys across multiple channels and touchpoints. This tool is instrumental in delivering personalized customer experiences at scale, engaging customers effectively based on their behaviors, preferences, and data.

Introduction to Journey Builder

Journey Builder is designed to help marketers orchestrate automated, personalized customer journeys that drive engagement and achieve specific business outcomes. It integrates seamlessly with other Salesforce Marketing Cloud tools, enabling a unified approach to customer engagement.

Key Features of Journey Builder

- Customer-Centric Journey Design: Create detailed, multi-step journeys that reflect the unique paths customers take with your brand.
- Multi-Channel Engagement: Engage customers across email, mobile, social, and other channels within a single journey.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Behavioral Triggers: Initiate journeys based on real-time customer actions or events, ensuring timely and relevant interactions.
- Dynamic Content Personalization: Incorporate personalized content in journey communications based on customer data and behavior.
- Analytics and Optimization: Measure journey effectiveness with built-in analytics and use insights to continuously optimize journey paths.

Setting Up Journeys in Journey Builder

Creating an effective journey involves understanding your audience, defining clear objectives, and leveraging the right mix of channels and messages.

Planning Your Journey

1. Define Your Goals: Start by outlining what you aim to achieve with each journey (e.g., increase conversions, boost engagement).
2. Understand Your Audience: Segment your audience based on demographics, behavior, and preferences to tailor the journey to their needs.
3. Map Out the Journey: Visualize the steps customers will take, considering various pathways based on their actions and decisions.

Building and Customizing Journeys

- Use Templates or Start from Scratch: Choose from pre-built templates or create custom journeys tailored to your specific objectives.
- Configure Triggers and Decisions: Set up the conditions that will initiate the journey and guide customers through different paths based on their interactions.
- Personalize Communications: Utilize customer data to personalize journey communications, enhancing relevance and impact.

Testing and Launching

Test Your Journey: Use test mode to ensure the journey operates as intended, making adjustments based on findings.

Launch and Monitor: Once satisfied, launch the journey and monitor performance closely, ready to make real-time adjustments as needed.

Measuring Journey Success

To maximize the effectiveness of your journeys, it's crucial to continuously analyze performance and iterate based on insights.

Key Metrics for Journey Success

- Engagement Rates: Track open, click-through, and conversion rates to gauge how well your communications resonate with customers.
- Journey Completion Rates: Measure the percentage of customers who complete the intended journey path.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Customer Feedback: Collect and analyze customer feedback to understand their experience and identify areas for improvement.

Optimization Strategies

A/B Testing: Test different versions of journey steps to determine what works best.

Segmentation and Targeting: Refine your audience segmentation to ensure the right messages reach the right people.

Iterative Improvement: Use analytics insights to continuously refine and optimize journey paths and communications.

Journey Builder equips marketers with the tools to create meaningful, personalized customer journeys. By understanding your audience, carefully planning each step, and continuously optimizing based on performance data, you can enhance customer engagement and drive significant business outcomes.

Messages

- Email - Sends any email created in Email Studio or Journey Builder to contacts that reach this activity
- 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 - Sends a message to the app inbox of contacts that reach this activity
- LINE Carousel 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

Flow Control

- Decision Split - Divides contacts based on a change in data associated with a contact. When you add a Decision Split activity, the journey evaluates contact data to decide path to send each contact on
- 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. You configure the customer action that Journey Builder evaluates to determine which path to send contacts down
- Join - Directs contacts from one branch into another branch. Marketers split contacts into two or more branches; then reunite the contacts on the same branch so they flow toward the same endpoint

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- 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.
- Custom Split - Enables marketers and their organizations to customize a split activity to meet company-specific needs

Customer Updates

Update Contact - Automatically updates a contact's data in a data extension. Marketers select a data extension where the activity updates data and choose the Attribute or Value that the activity is to update. Updating an Attribute or Value overwrites a value in an existing row. The existing value doesn't increase incrementally and new rows aren't added. If no rows for the associated Contact Key exist, the system adds a row. If there are one or more existing rows for the associated Contact Key, the system updates existing rows and doesn't add new rows.

Sales & Service Cloud

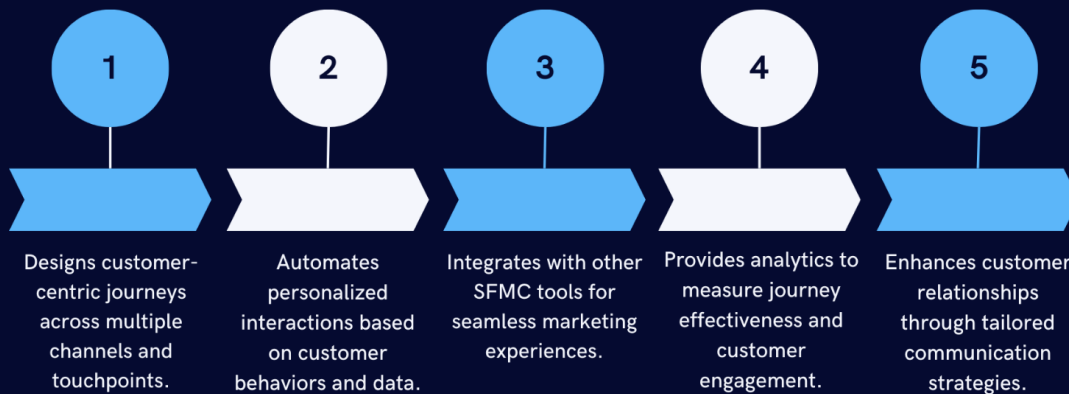
- Object Activity - Creates or updates a Sales or Service Cloud record in an object when a contact in the journey reaches it. Use this activity when a journey creates or updates a custom object
- Contact - Creates or updates a contact in the Sales and Service Cloud for each Marketing Cloud contact that reaches this activity
- Opportunity - Creates an opportunity record in Sales and Service Cloud. Marketing Cloud contact attributes can be used to populate fields on the opportunity record
- Convert Lead - Converts qualified leads from Sales and Service Cloud
- Task - Creates or updates a task in Sales and Service Cloud for each Marketing Cloud contact that reaches this activity
- Update Campaign Member - Updates a Campaign record in Sales and Service Cloud
- Add Member to Campaign - Looks up Campaigns in Sales and Service Cloud and adds Marketing Cloud contacts to the
- Account - Creates or updates an account in Sales and Service Cloud for each contact that reaches this activity
- Choose Object - Creates or updates any type of object record in Sales and Service Cloud. Select the object to update; then select the fields to update with Marketing Cloud attribute data
- Lead - Creates or updates a lead record in Sales and Service Cloud for each contact that reaches the activity
- Case - Creates a case and associates it to Sales and Service Cloud contact that matches the Marketing Cloud contact's ID

Molengeek International

Salesforce Cloud
KA220-VET-C971A987



JOURNEY BUILDER



5. Advertising Studio

Marketing Cloud Advertising helps you engage and advertise to your customers and prospects. You can use Marketing Cloud Advertising to coordinate campaigns with social, mobile, sales, and customer service efforts. Marketing Cloud Advertising helps you enhance your email marketing goals with advertising. Use Facebook, Instagram, Google Ads, LinkedIn, Twitter, Pinterest, or Snapchat to engage with existing customers. Find new prospects with lookalikes, and re-engage inactive users within the customer journey across digital advertising.

Use Marketing Cloud Advertising to :

1. Activate your CRM data for targeting
2. Create ad campaigns into your customer journeys using Journey Builder
3. Connect your Facebook and Google advertising leads with Marketing Cloud data extensions or Sales Cloud lead objects in real time with Lead Capture

Advertising Audiences in MC Advertising

With Advertising Audiences you can use Marketing Cloud data to target your digital advertising campaigns across various platforms. These platforms include Facebook, Instagram, Google Ads, LinkedIn, Twitter, Pinterest, and Snapchat.

Use Advertising Audiences to :

- Reach existing customers with targeted and specific messaging

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Acquire new customers by creating seed audiences that can be expressed as lookalike audiences on destination networks
- Suppress existing customers for acquisition campaigns
- Re-engage unengaged email subscribers
- You can also configure audiences to refresh automatically.

Advertising in Journey Builder

Create ad audiences in Journey Builder for Facebook, Google Ads, LinkedIn, Twitter, or Pinterest. Create campaigns directly in Journey Builder, specifically for Facebook. To use this feature, Marketing Cloud Advertising and Journey Builder must be enabled in your Marketing Cloud account.

With Journey Builder Advertising, you can build cross-channel journeys that combine email, mobile, and Facebook advertising. Use the Ad Campaigns activity to increase the reach of your email campaigns.

Lead Capture in Marketing Cloud Advertising

To connect your Facebook or Google advertising leads with Marketing Cloud data extensions or Sales Cloud lead objects use Marketing Cloud Advertising's Lead Capture feature.

Before you use this feature, you must:

- Enable data extensions in your Marketing Cloud account.
- Create a Facebook or Google lead advertising form.
- Use a business version of Facebook.
- Have admin level permissions on the Facebook page associated with the lead advertising form.

Dominos Cards

Content Builder

- A powerful tool within Salesforce Marketing Cloud that provides a streamlined interface for creating, managing, and tracking personalized marketing content across multiple channels.

Dynamic Content

- Content that changes based on the audience's behaviors, preferences, or data attributes, enabling personalized communication in marketing campaigns.

Email Templates

- Pre-designed email layouts that can be used and customized within Content Builder to create consistent and effective email marketing campaigns quickly.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

6. Mobile Studio

Introduction to Mobile Studio

Mobile Studio offers marketers a suite of tools to create, send, and track mobile messaging campaigns. It enables personalized, timely, and effective communication with audiences, leveraging mobile as a primary touchpoint in the customer journey.

Core Capabilities:

- SMS and MMS Messaging: Enables the delivery of text messages and multimedia messages to engage customers with concise, impactful content.
- Push Notifications: Allows marketers to send notifications directly to users' mobile devices, driving app engagement and delivering timely updates.
- Mobile Automation: Supports the automation of mobile campaigns, integrating with Journey Builder to create personalized customer journeys that include mobile touchpoints.
- Location-based Messaging: Facilitates the sending of geographically targeted messages, enhancing relevance and engagement for mobile users.
- Navigating Mobile Studio
- Mobile Studio's interface is designed to streamline the creation and management of mobile campaigns, offering a user-friendly environment for marketers. Key components include:
 - MobileConnect: For SMS and MMS messaging, providing tools to create, send, and track text-based campaigns.
 - MobilePush: Designed for managing push notification campaigns, with features for audience segmentation, message creation, and performance analysis.
 - GroupConnect: Allows for messaging on popular messaging apps, enabling engagement on platforms where customers are already active.

Implementing Mobile Campaigns

To effectively leverage Mobile Studio for mobile marketing campaigns, follow these steps:

1. Define Your Mobile Marketing Objectives: Start by identifying what you aim to achieve with your mobile campaigns, such as increasing app engagement, driving sales, or enhancing customer service.
2. Segment Your Audience: Use SFMC's data management capabilities to segment your audience based on demographics, behavior, and preferences. Tailor your mobile messaging to target these segments effectively.
3. Create Engaging Content: Whether crafting SMS messages, designing MMS content, or developing push notifications, ensure your content is engaging, concise, and relevant to the recipient.
4. Leverage Automation and Personalization: Use Journey Builder to automate mobile campaigns and incorporate personalized messaging based on customer data and interactions.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

5. Incorporate Location-based Messaging: Enhance message relevance by utilizing location-based targeting for timely and contextually relevant communications.

Advanced Strategies for Mobile Studio

Maximizing the impact of Mobile Studio involves adopting advanced strategies and best practices for mobile engagement.

Omnichannel Integration

Integrate your mobile campaigns with other channels, such as email and social media, to create a cohesive customer experience. Leverage insights from mobile interactions to inform strategies across all channels.

Engagement Analytics

Utilize Mobile Studio's analytics tools to track the performance of your mobile campaigns. Analyze metrics such as delivery rates, open rates, and conversion rates to refine your strategies and improve ROI.

Personalized Customer Journeys

Develop personalized customer journeys that incorporate mobile touchpoints. Use customer data and behavior to trigger timely and relevant mobile interactions, enhancing the customer experience and driving engagement.

Regulatory Compliance

Ensure compliance with mobile marketing regulations and best practices, including opt-in requirements and message frequency limits. Use Mobile Studio's compliance features to manage opt-out requests and maintain regulatory adherence.

Dominos Cards

Mobile Studio

- A component of Salesforce Marketing Cloud focused on mobile marketing, including SMS, MMS, and push notifications, allowing marketers to reach customers on their mobile devices.

SMS Marketing

- The use of text messages to communicate promotional content directly to customers, including offers, updates, and alerts, as part of a broader marketing strategy.

Push Notifications

- Messages that pop up on a mobile device, sent by an app or website to provide users with updates, reminders, or promotional content, even when the app is not in use.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

7. Email Studio

"Email Studio: Where every email becomes a masterpiece of engagement, blending art and science to deliver messages that resonate, inspire, and drive action."

Email automation is about more than simply letting an automated system do your work for you. According to Epsilon, automated emails get 199% higher click rates than traditional broadcast emails, and that's only the beginning; automated event-trigger email marketing has been known to reduce marketing spend by as much as 80%. This means that a properly managed automated email-marketing campaign can not only bring you more customers, but also cost your business less in the process. Automated email marketing is designed to help you increase ROI from both ends. Unfortunately, many businesses are failing to properly take advantage of this lucrative program. In fact, as much as 64% of chief marketing officers have no process in place to manage automated marketing.

Different send types in Marketing Cloud :

1. Guided send : A guided send is a send process that uses the Email Send Wizard.
2. Single send (Simple send) : A single send is an email send to a single person from the API. This feature was used before the triggered sends functionality was introduced.
3. Test send : You can send emails to test lists or directly to individual email addresses
4. Triggered send : A triggered email is an email message that your system sends to an individual (subscriber) in response to a subscriber action. For example, sending a confirmation message after a customer makes a purchase is a triggered email.

Different kind of opt-ins :

1. Contacts who submitted a form on your website
2. Contacts who made a purchase with your brand in the last six months
3. Contacts who entered a written contract with your brand in the last six months
4. Contacts who donated to or volunteered with your company in the last six months
5. Contacts who signed up for and are active users of your service, organization, or club
6. Contacts who filled out a paper or electronic sign-up sheet specifically for your newsletter

Subscribers

A subscriber is a person who has opted to receive communications from your organization. You must have a valid email address for each subscriber who receives emails. For each subscriber who receives SMS messages, you must have a valid phone number. You can track additional information about subscribers using profile and preference attributes. Use the subscriber key to identify your subscribers in Marketing Cloud. Create lists or data extensions to store your subscribers. Store email subscriber information in lists or data extensions, and store SMS subscriber information in data extensions only. To segment your subscribers, create as many lists and data extensions as you need. You populate the information in the lists and data extensions when you add or import subscribers.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

There are several different ways to add subscribers:

1. Use the subscriber import wizard.
2. Use the Automation Studio import activity.
3. Create a subscriber manually.
4. Capture subscriber information through a Smart Capture form.
5. Use groups and data filters to further segment subscribers. When you send a message, you select the list, data extension, or groups to receive the message.

CAN-SPAM Compliance (CAN SPAM Requirements)

- Transactional emails are sent to a person as a result of a specific action taken by the user.
- Commercial emails are promotional emails sent to a user in order to drive awareness, encourage engagement, or make a sale.

The CAN-SPAM act requires that Commercial emails, whose primary purpose is to deliver commercial content, meet the following criteria:

- Accurately identify the sender in the header information.
- Use a subject line that accurately represents the content of the email.
- Identify the message as an advertisement, unless you have express consent (opt-in) from the subscriber.
- Include your physical mailing address.(checked by MC before sending)
- Provide a mechanism to opt out. You cannot require a subscriber to log in or visit more than a single page to unsubscribe. (checked by MC before sending)
- Honor opt-out requests promptly. You must process an unsubscribe request within 10 days, and your unsubscribe mechanism must be operational for at least 30 days after the mailing.
- However, Transactional messages, whose primary purpose is to communicate transactional content, are mostly exempt from all requirements except the first one. A transactional message is one that facilitates an already agreed-upon transaction or updates a customer about an ongoing transaction. For example, if a customer orders a product from your website, the receipt you send via email is a transactional message.

Because Transactional messages are not required to honor opt-out requests, when the system sends a transactional message, it does not prevent the message from being delivered to subscribers who have unsubscribed at any level.

You tell the system whether an email is Commercial or Transactional by associating a commercial or transactional send classification to it. When you create a transactional send classification, you can choose to have the system honor list-level opt-outs by selecting the honor source and publication list-level opt-outs checkbox. If you want some of your Transactional messages to honor opt-outs while others don't, you can create multiple transactional send classifications.

Email Deliverability Best Practices for Email Studio

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Marketing Cloud works with you to optimize the deliverability of your campaigns by helping with key elements of email optimization, such as:

- Email list capture process and recommendations on opt-in method
- Email From address branding
- Email subject line branding and optimization
- Email content consulting to avoid common words and phrases targeted by spam filters
- List hygiene
- ISP compliance
- Volume filter avoidance via Domain Monitoring
- SMTP log filtering to proactively detect blocking

CAN-SPAM

CAN-SPAM is the popular name for the U.S. law regulating commercial email that went into effect on January 1, 2004, the Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003.

Per CAN-SPAM legislation, all commercial emails must include a viable Internet-based opt-out mechanism, which must be active for a minimum of 30 days after you send the email. Second, you must display your company's physical mailing address within the body of your email. The application automatically checks for both the return email address and unsubscribe link before the system can send the email.

In addition, per CAN-SPAM legislation, marketers cannot do the following:

- Use a false or misleading from name
- Use a subject line that masks the purpose of the email
- Harvest email addresses off the Internet
- Launch dictionary attacks (A dictionary attack is a method of breaking into a password-protected computer, network or other IT resource by systematically entering every word in a dictionary as a password.)
- Use open relays to send email
- Repeated unsolicited emails can lead to complaints, and this is the leading cause of email blocking at ISPs.

We recommend the following steps for compliance :

- Manage unsubscribes within 10 days of a send and enforce them across your entire enterprise.
- Always capture opt-in or affirmative consent to remove labeling requirements.
- Ensure that subject lines are not deceptive or misleading.
- For transactional or relationship messages, ensure that the subject line is non-promotional and that the transactional content is placed above any commercial content.

Email deliverability (summarized version)

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

1. Spam Filters : Most ISPs use filters to sort the legitimate email from junk or spam for their users. Elevated bounce rates, elevated complaint rates, or low open rates are all indicators that recipients may find your mail to be unwanted, and ISP spam folders are more likely to consider your mail as spam as a result.
2. Address Book Strategy : To maximize the number of subscribers who add you to their address book, and minimize the number of sends that end up in a bulk or spam folder, add address book instructions to your email.
3. Subscribers Permission : High complaint rates are possible if your subscribers have not given you explicit permission to send them email.
4. Bounce Rate < 20% : Proactively remove your bounced addresses before your next send. Though the application automatically holds undeliverable emails after the third bounce, a bounce rate over 20% can dramatically harm your deliverability and ISP reputation.
5. Subject Line Recognition : Ensure that your subscribers recognize your email is from you by adding the name of your organization to the subject line. Make sure this is a name with which they are familiar. Because the subscriber can easily click the "report spam" button without even opening the email, subject line recognition is critical to reducing complaints at AOL and elsewhere.
6. From Name and Address Ensure that your 'from name' and 'from email address' are recognizable by subscribers. Also, the 'from name' is the first item that most individuals look at when determining what mail to open and which to ignore or complain about.
7. Name Capture Language : It can be a good idea to add language at the top of your emails stating how the subscriber opted in to receiving your email communications. A reminder can help increase results and reduce complaints. You can also include an unsubscribe link at the top of your emails, as well. If you have an elevated unsubscribe or complaint rate, this is likely to help reduce that rate.
8. Purge Old or Inactive Addresses : These customers cost money to mail, reduce your ROI, and are more likely to complain. Run the Unengaged Subscribers for a List Report to view which subscribers haven't opened or clicked through your emails during a certain time period.
9. Manage frequency and content : Are you sending your emails more often than you promised? Less often? Is the content different from what you promised ? Remember that permission communications are to be anticipated, personal, and relevant.
10. Authenticate your email to avoid bulk folder delivery : Sender Authentication does not exist in today's standard SMTP logic for email; therefore, spammers attempt to disguise their identity and locale. Spammers using these tactics are targeted by ISPs. Authenticating your email helps differentiate your email from spam, protects your brand, and bolsters your ROI. The Salesforce Marketing Cloud also offers a Sender Authentication Package to handle authentication for your email sends. Email authentication alone isn't going to guarantee that your mail will never be perceived as spam, but it's a necessary step to help ensure that an ISP is best able to tell good senders apart from bad senders.

Spam Traps :

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

The most common types of spam traps are honeypots (addresses created specifically to catch spammers) and recycled spam traps (addresses that can be reused after 6-12 months of inactivity). Successful honeypots suggest issues with your opt-in process or that your list may contain purchased subscriber data. Successful recycled spam traps suggest list hygiene issues and that you need to scale back your audience to subscribers with engagement in the last six months.

You can generally avoid spam traps by doing the following:

- Don't purchase or rent lists.
- Actively remove hard bounces from your campaigns. Salesforce Marketing Cloud does this for you.
- Continuously re-engage your inactive subscribers. At three months of no engagement, a subscriber is considered 'uninterested' and the odds of 'win back' decrease greatly. Consider a highly targeted campaign designed to win back their business. If they still don't engage, consider dropping them before the six-month window.
- Remove unengaged subscribers. At six months of no engagement, remove them from your mailing list.

Email Deliverability FAQ

Why focus on AOL?

Our industry partnerships are maintained only by our diligence in reducing bounces and complaints and closely monitoring client email results. AOL sets specific guidelines of a 10% bounce rate and a 0.1% complaint rate. Continued mailing over these rates will result in blocking of your future emails and potential blocking of your domain. AOL is an indicator of what occurs with other ISPs, so if you have problems at AOL, then the problems also exist elsewhere.

What is permission email marketing?

Permission email marketing is only communicating with clients and prospects that have granted their explicit permission. These subscribers must know you, be interested in your content, and approve the frequency of your communications.

Why is permission important?

Results: Email is most effective when your message is anticipated, personal, and relevant. Sending unwanted mail reduces deliverability and ROI.

Reputation: Inappropriate use of email generates customer complaints and damages your reputation and brand.

Legal: Permission is no longer optional. The federal CAN-SPAM Act, effective January 1, 2004, provides specific guidelines for commercial email, such as the presence of the sender's physical mailing address and a valid opt-out mechanism.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

What happens to the addresses of people who complain?

Our feedback loop with AOL means that all addresses that report your mail as unwanted are automatically unsubscribed from your account and placed in your master unsubscribe list.

Who is SpamCop?

SpamCop is an independent organization that operates a blocklist of IP addresses they believe are responsible for sending unwanted mail. A report indicates that a person trusted to report for their network believed that your email was not requested. Just a few reports could mean temporary or permanent blocking of your mail.

IP Address Warming for Email Studio

When you become a Salesforce Marketing Cloud customer, the assigned sending IP addresses have never been used to send email. Inbox service providers (ISPs) are suspicious of mail received from IP addresses that lack history. Microsoft says that 80% of unrecognized connections attempt to deliver spam or malware. Senders are guilty until proven innocent. Therefore, ISPs and webmail providers recommend that you warm or ramp up new IP addresses by building their sending reputation over time.

To warm an IP address, slowly and methodically send small volumes of email, then gradually increase your volume to the providers' users. The goal is to build up approximately 30 days of sending history and data so that ISPs get familiar with email coming from your new IP address. The warming period can take longer than 30 days for some senders and a shorter time for others. Factors such as your overall list size, list quality, and subscriber engagement can influence the amount of time it takes for your IP address to fully warm.

Warming Guidance

We recommend that you focus on sending to your most active and engaged subscribers during this critical period. The initial sends are the basis for the ISPs to determine your sender IP address sending reputation. Therefore, the more opens and clicks that are registered, the faster receivers can gather positive metrics to establish your sender reputation. Warming involves sending a limited number of messages per IP per day, so it's important to further adjust your current sending practices as part of the process.

Here are some ways that our customers have achieved the recommended volume targets:

- Split large, non-time-sensitive sends over various days
- Split campaigns between a new Marketing Cloud IP address and your legacy mail system
- Migrate over smaller-volume, transactional campaigns to Marketing Cloud before larger marketing programs
- Create non-time-sensitive campaigns, like subscriber surveys, to use specifically for warming new IP addresses

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- Following the warming guidance mitigates but doesn't eliminate deliverability risk. The goal of warming is to build reputation and establish your typical traffic patterns with the ISPs and receivers. The key to ongoing success is to maintain that reputation and volume by consistently sending similar volumes to your subscriber base and not surprising them with unexpected content.

Some tips :

- Split campaigns between a new Marketing Cloud IP address and your legacy mail system
- Migrate over smaller-volume, transactional campaigns to Marketing Cloud before larger marketing programs
- Create non-time-sensitive campaigns, like subscriber surveys, to use specifically for warming new IP addresses
- During the first three weeks of warming, focus on new subscribers or subscribers with an open or click registered in the last 30 days. This audience is actively engaged in your emails and is more likely to open or click, which drives positive metrics with the ISPs and receivers.
- In the fourth week, expand your audience to subscribers with engagement in the last 60 days.
- Around week six, add subscribers who have engaged in the last six months. Beyond that timeframe, Marketing Cloud recommends that you suppress remaining subscribers as your unengaged audience. There's a low chance for subscriber engagement after six months, and an increasing chance that subscribers hit spam traps or mark your mail as spam.

Sender Authentication Package for Marketing Cloud Email

Sender Authentication Package (SAP) is a Marketing Cloud account branding tool that allows you to customize links and images to match branding for the authenticated domain you're sending email from

SAP features include Private Domain for Email sending, Custom Domain for CloudPages, Account Branding with view-as-webpage, link and image wrapping, Dedicated IP Address, and Reply Mail Management.

Account Branding - Marketing Cloud brands your account with your chosen authenticated custom domain. This feature modifies view-as-a-webpage, link and image wrapping, and removes all references to Marketing Cloud in favor of your custom authenticated domain.

Private Domain for Email sending - This feature assigns a domain used to send email. This domain acts as the From address for your email sends. Salesforce Marketing Cloud

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

authenticates your email sends using the Sender Policy Framework (SPF), Sender ID, and DomainKeys/DKIM authentication.

Custom Domain for CloudPages - This feature includes a private domain for CloudPages.

Dedicated IP Address - This feature assigns a unique IP address to your account. All email messages sent from your account from Marketing Cloud use this IP address. This IP address represents most of your sending reputation.

Reply Mail Management - This feature controls the replies you receive from your subscribers. You can assign filters for out-of-office messages and manual unsubscribe requests.

Considerations : SAP is right for any customer who sends more than 250,000 email messages per month, is concerned about branding, and wants to ensure that Marketing Cloud default branding doesn't appear in links or images. Sending a minimum of 250,000 email messages per month is required for keeping a dedicated IP ramped up from a reputation perspective. If you send less than 250,000 email messages per month, you can still benefit from authentication of SAP and request to remain on our shared IPs or share another IP within your account structure. A business unit only supports one SAP for branding purposes. Therefore, view-as-webpage, links and images can only point to one domain.

Message Creation Best Practices and Tips

To quickly get started creating emails, use our out-of-the-box default templates. Update content blocks with relevant content for your email and brand. Delete unused content blocks from the email before sending.

On the Add/Edit Content step of the email creation flow, you can save an email as a template for future use. Use templates as a starting point for a simplified email creation process, especially for content that is repetitive.

Use any of these options to create or modify emails with similar content:

- Create an email from a template.
- Create from existing email.
- Duplicate then rename the email.

If you want to start from an email created with the classic tools, select Create from existing email then choose the classic email. This copies the content in your classic email to Content Builder so you can edit, test, and send the email with the new tools.

Preview and test your emails before live sending. We recommend test sending emails to different email clients, browsers, and devices to ensure the email renders correctly.

Set up a test audience to include multiple subscribers and attributes to preview emails with targeted 1:1 personalization. Select a subscriber in Subscriber Preview then toggle between subscribers to preview how the email renders.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Quickly send a test email to up to five recipients. Or test send to a larger audience, testable Data Extension, using Test Data Extensions.

You can test send emails based on multiple content personalization options:

1. Individual subscriber selected in Subscriber Preview.
2. Entire subscriber audience in Subscriber Preview.
3. Recipient Test Data Extension.

The Subject Prefix field in the Preview & Test step on the Test Send tab can be updated with a test related-word which pre-pends to the Subject in the test send.

Use the Approvals workflow with Content Builder emails to verify and control emails before live sending. If Approvals is enabled in your account, select Start Approvals process in the creation workflow or in the properties of the email to collaborate with your team in finalizing your email campaigns.

To quickly locate emails, the Email Subject Line field is displayed in the Content Builder library under the Email Name.

You can use the Email ID on the Details screen to reference Content Builder emails in SQL queries.

Asset ID on the Details screen is the primary key for each Content Builder asset. Use Asset ID to reference content blocks with the ContentBlockByID() AMPscript function.

Edits to emails used in active journeys are not used in the journey until you update the activity.

Auto-suppression Lists

Assign a suppression list for use across an entire Marketing Cloud tenant or for specific business units for specific send classifications. You can assign auto-suppression lists at different levels of your account. Suppression lists filter out email addresses and prevent those addresses from receiving Email Studio messages. Suppression lists serve as a do-not-contact list for your email sends. Auto-suppression lists typically include addresses with a history of spam complaints, unsubscribe lists from previous providers or advertisers, addresses of your competitors, and canceled customers

Fields on auto-suppression lists are similar to attributes on a regular list. However, you can't use fields for personalization or segmenting. Fields on suppression lists serve as informational data for you and other users of Marketing Cloud. When you create an auto-suppression list, the system generates default fields.

Email Address

Date Added

+ Add as many fields as necessary.

Content Detective

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Content Detective is an Email Studio tool that helps you identify spam triggers in your email content. This feature mirrors the logic used by spam-filtering software to identify words, phrases, and patterns that are likely to trigger filters and then recommends a resolution to each identified problem. After running Content Detective, edit the triggers identified in the email using the recommend resolutions.

Including just one potential trigger word or phrase will not greatly affect your email's deliverability. If Content Detective finds two or more potential triggers, remove them to improve your subscribers' chances of receiving your email.

This list includes trigger words that prompt a warning from Content Detective in Email Studio. This list is not complete and may change without notice.

- !!!
- \$\$\$
- 100% Free
- 4U
- Absolutely Free
- Accept Credit Cards
- act now! don't hesitate!
- cannot be considered spam
- mortgage network
- Mortgage Rate
- multi level marketing
- Naughty
- no cost
- no experience needed
- pennies a day
- percent off
- please read
- Porn
- Pornography
- Potential Earnings
- promise you
- purchase order
- purchase today
- pure profit
- Read this twice
- Read Twice
- Reduce your interest rate
- Refinance today
- refinance your home
- reverses aging
- risk free
- save
- Save \$

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- save an extra
- university diploma
- viagra
- we honor all
- we strongly oppose the use of spam email
- while supplies last
- while you sleep
- why pay more?
- you are a winner
- you're a winner

How to avoid spam filters ?

Understanding Spam Traps

Spam traps are email addresses used by Internet Service Providers (ISPs) and organizations fighting spam to identify and block emails from senders who don't follow proper email acquisition and management practices. They come in various types, primarily pristine, recycled, and typo (or honey pot) traps. Pristine traps are email addresses created solely to catch spam and are never used for communication, meaning any email sent to these addresses is immediately considered spam. Recycled traps are old, abandoned email addresses reactivated by ISPs to catch spammers who use outdated lists. Typo traps are addresses created to catch emails sent to misspelled email domains.

The impact of hitting a spam trap can be severe, affecting your sender reputation and email deliverability. ISPs and email service providers use these interactions to score senders, and too many hits on spam traps can lead to blacklisting, drastically reducing the effectiveness of your email marketing campaigns.

Identifying and Preventing Spam Trap Hits

Identifying potential spam traps in your list can be challenging, as they are not openly disclosed and can be indistinguishable from legitimate addresses. However, sudden drops in deliverability rates, increased bounce rates, and unexpected blacklisting can be indicative of spam traps in your list.

Preventing spam trap hits starts with acquiring email addresses ethically. Always ensure consent through double opt-in methods, where subscribers confirm their subscription via an email link. This not only verifies the email address but also demonstrates engagement, significantly reducing the likelihood of acquiring spam traps.

Maintaining a Healthy Email List

Regular email list hygiene is crucial for avoiding spam traps. This involves periodically removing inactive subscribers, hard bounces, and unengaged users from your list. Utilizing email validation and verification services can help identify and remove potentially problematic addresses before they cause issues.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Engagement strategies also play a vital role in maintaining a healthy email list. By segmenting your audience and tailoring content to their interests, you can improve open and click-through rates, keeping your list engaged and active. This reduces the chance of your emails being marked as spam, which can lead to hitting spam traps.

Recovery and Remediation Strategies

If you suspect that your emails have hit spam traps, immediate action is required to mitigate the damage and restore your sender reputation. Start by conducting an audit of your email list, removing any suspicious or unengaged subscribers. Reach out to your email service provider or a deliverability expert if you're blacklisted to understand the steps for removal.

Improving your email practices is also essential for long-term recovery. Implement stricter list acquisition policies, enhance engagement strategies, and maintain regular list hygiene to prevent future occurrences.

Headers and Footers

Marketing Cloud can add text and images to the beginning and end of your email messages that ensures compliance with CAN-SPAM regulations.

Set this information as part of the send classification or customize how those headers and footers appear at an account level. Select whether email messages sent from this account include your choice of header and footer:

- System-default header and footer
- Custom header and footer specifically for that account
- No header and footer at all

New customers with branded accounts use custom headers and footers without any system default information. Existing customers can contact Marketing Cloud support for assistance with configuring this setting.

A/B Testing in Email Studio

A/B Testing is a market testing method in which you send two versions of your Marketing Cloud Email Studio communication to two test audiences from your subscriber list. Track which version receives the highest unique open rate or highest click-through rate and send that version to all remaining subscribers.

Continually testing these variables over time allows you to optimize your email campaigns to deliver more targeted and relevant messages to your subscribers. Through automating the testing process, you can save valuable time and resources. You can test the following elements:

- Subject Line - Create 2 different subject lines and track which performs better. Each subject line has a 256 character limit.
- Email - Select 2 different emails and track which email send performs better.
- Content Area - Select an email that contains at least two different content areas and track which content area performs better.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- From Name - Create 2 different from names and track which email send performs better. You can select an existing from name in your account, or manually enter a From name to use. To add more from name options to your account, create an additional user.
- Send Time - Select 2 different dates and times to send and track which time performs better.
- Preheaders - Create 2 different preheaders and track which preheader performs better.

You can run an A/B test on an email that contains dynamic content, a dynamic subject line, or AMPscript. The exception is a dynamic subject line when you are running a subject line A/B test and testing two emails. When testing two emails that contain a dynamic subject line, the default subject line is always used. Use AMPscript in the subject line instead of dynamic content. If you experience issues, contact Global Support.

The system randomly selects which subscribers receive test and remainder, allowing you to use the same set of subscribers for A/B tests in the future. Send the winning version to the remainder of your subscribers automatically when the winner is determined or to come back and manually perform the send.

While A/B testing is a part of the test process, you are sending to real subscribers, so ensure that you send a polished, final product. Use A/B testing before you execute your final send but after you have reviewed and performed test sends.

Social Forward

Social Forward in Email Studio enables email recipients to share content from emails with other users via their preferred social network. Choose the sections of the email to enable with Social Forward and the networks represented by links and images in the email. Social Forward also tracks any clicks from an email to a social network and the resulting page views from the URL shared by the email recipient.

Social Forward creates a streamlined process for your subscribers to share content with their friends and contacts via social networks. Determine the shared content and how that content appears in the social networks, allowing you to preserve your branding and promote your message. Social Forward also allows you to specifically target certain social networks that better receive your message or information.

Social Forward supports direct linking to a specific social network or the use of a third-party service like ShareThis. Social Forward also supports international networks. Images representing the social networks are stored in your Portfolio folder under a Social sub-folder. These pictures can be altered or changed to your specifications.

Social Forward and Portfolio must be enabled on your account to use Social Forward. In addition, Social Forward uses AMPscript to create the links used to share content with Social Forward.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

The application creates the AMPscript for you, or you can manually add the AMPscript yourself. Therefore, be familiar with AMPscript to manually add these links to your email. Contact your Marketing Cloud account representative for more information.

Social Forward uses links in the email to share predefined content areas, and you can use this function in different situations:

1. **Sharing a Direct Link** - Click an enclosed link in an email to share content with your contacts on your individual social networking account. The social network requires you to log in and view a preview of the form to be shared on that network. You add any comments or changes you want to make and submit the item, which posts it on your wall, bookmark list, or other shared forum.
2. **Sharing a Content Listing** - Click an enclosed link in an email to share content with your contacts on your individual social networking account. On an intermediary page, you choose the link. The social network requires you to log in and view a preview of the form to be shared on that network. You add any comments or changes you want to make and submit the item, which posts it on your wall, bookmark list, or other shared forum.
3. **Sharing Content via ShareThis** - Click an enclosed link in an email to share content on ShareThis. Choose the social network from a ShareThis widget on an intermediary page. ShareThis requires you to log in and view a preview of the form to be shared on that network. You add any comments or changes you want to make and submit the item, which posts it on your wall, bookmark list, or other shared forum.

Tracking in Email Studio

Tracking is an aggregated collection of data that allows you to view critical elements such as email opens, clicks, undeliverable messages, and other metrics online. You can also capture how many emails are forwarded and how many new subscribers each forward generates. You can create a subscriber list from tracking data to monitor subscriber and list performance. Marketing Cloud stores your tracking data for the life of your contract.

The tracking feature uses a 1x1 pixel transparent GIF image to track information. The pixel is automatically inserted into every email unless you use an HTML-Paste template.

Clicks and Opens Behavior

As part of tracking, details about email engagement are recorded, such as the time a message was opened, and the time links were clicked. Click and open events are always related to the original subscriber in a send. Marketing Cloud Email Studio records all events that occur, as there are no clear indicators whether opens are from a human or a bot program. So if an email is shared, opens or clicks that occur shows in tracking or reports as belonging to the original subscriber.

Out of the data that is recorded, an extra parameter for a unique open and click limits the subscriber to having a single unique open and a single unique click.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Compare Tracking Results

Compare high-level metrics for each message in a campaign and overall campaign numbers. The tracking results comparison feature shows how many emails were sent, how many were delivered, how many of the subscribers unsubscribed, how many emails were opened, and the number of click-throughs.

To view these metrics:

- Click the Tracking tab.
- Select the checkbox next to the email sends to compare.
- Click Compare Email Sends.
- Click Print or Export.

8. Automation Studio

Introduction to Automation Studio

Automation Studio is a robust feature within Salesforce Marketing Cloud (SFMC) that provides marketers and data managers with an advanced set of tools to automate marketing processes, data import/export tasks, and communication flows. It supports a wide range of activities, from simple email sends to complex, multi-step workflows that include data manipulation, segmentation, and personalized messaging.

Core Capabilities

- **Workflow Automation:** Allows the creation of multi-step workflows that can execute various tasks such as email sends, SMS messages, data extracts, file transfers, and more.
- **Data Management:** Offers extensive capabilities for managing data within SFMC, including importing data from external sources, exporting data for use in other systems, data cleansing, and transformation tasks.
- **Segmentation and Targeting:** Enables the creation of dynamic audience segments based on data stored within SFMC, allowing for targeted and personalized marketing campaigns.
- **Scheduled and Triggered Automations:** Automations can be scheduled to run at specific times or triggered based on specific events, providing flexibility in how and when marketing tasks are executed.

Technical Deep Dive into Automation Studio

To leverage Automation Studio effectively, understanding its technical components and how they work together is essential. This includes familiarity with the tool's interface, its key features, and best practices for designing and implementing automations.

Setting Up Automations

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Creating an Automation: Automations are created within the Automation Studio interface, where you can define the steps, tasks, and schedule for each automation. This involves selecting the activities you want to include, such as data imports, email sends, or SQL queries, and configuring them according to your requirements.

Activity Types and Configurations: Each activity within an automation has its own set of configurations. For example, a data extract activity requires specifying the format and destination for the extracted data, while an email send activity involves selecting the email content and target audience.

Workflow Design: Designing an effective workflow involves sequencing activities in a logical order and configuring decision splits or wait times as needed. This might include sending an initial email, waiting for a specific period, and then sending a follow-up email to those who didn't open the first one.

Advanced Features

SQL Query Activity: One of the most powerful features of Automation Studio is the ability to run SQL queries against your SFMC data. This can be used for complex segmentation, data cleansing, and aggregation tasks. Understanding SQL and how to construct queries is essential for leveraging this feature effectively.

File Transfer Activities: Automation Studio can automate the process of importing data from or exporting data to external systems. This involves setting up file transfer activities and configuring Secure FTP settings to ensure secure data transmission.

API Integrations: For scenarios where direct integration with external systems is required, Automation Studio can trigger API calls as part of an automation workflow. This requires familiarity with web service APIs and how to configure API request and response settings within the platform.

Best Practices for Using Automation Studio

Test Before Launching: Always test your automations in a sandbox or testing environment before activating them in production. This helps identify any issues with the workflow or activity configurations.

Monitor and Optimize: Regularly monitor the performance of your automations, using the tracking and reporting tools within SFMC to identify areas for optimization.

Data Hygiene: Implement regular data cleansing and maintenance tasks within your automations to ensure that your marketing efforts are based on accurate and up-to-date information.

AI and Machine Learning Overview

Capabilities of Einstein AI in SFMC: Deep dive into Einstein AI's features within SFMC, exploring how it can automate decision-making and personalize customer interactions.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Integrating AI into Marketing Automations: Practical examples of leveraging AI within Automation Studio for enhanced content personalization, optimal send time determination, and predictive journey mapping.

Building Custom AI Models

Developing Custom Models for Marketing Insights: Introduction to the process of developing and integrating custom AI and machine learning models into Automation Studio for unique business needs.

Use Cases for Custom AI in Marketing Automation: Exploration of advanced use cases, demonstrating how custom AI models can transform marketing strategies and execution within SFMC.

Dominos Cards

Automation Studio

A feature within Salesforce Marketing Cloud that enables marketers to automate marketing and data management tasks, creating complex, multi-step workflows for efficiency and scale.

SQL Query Activity

An activity in Automation Studio that allows users to execute SQL queries against their data in Salesforce Marketing Cloud, used for segmentation, data manipulation, and reporting.

Scheduled Automations

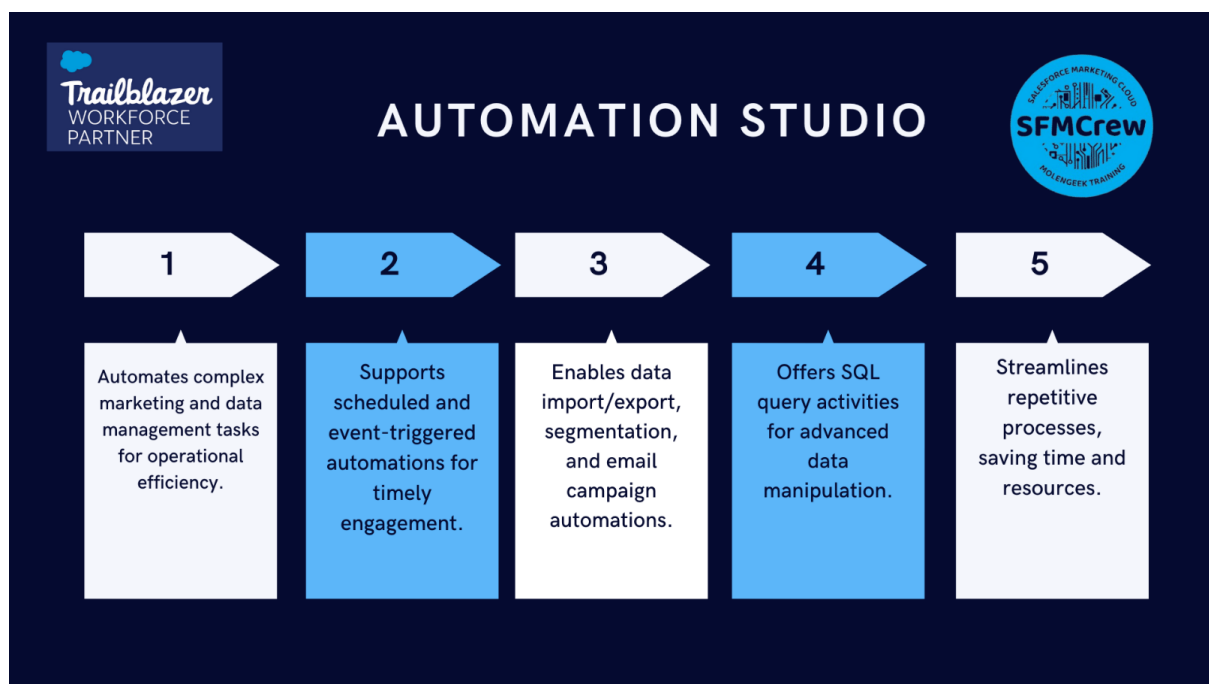
Automations in Automation Studio that are set to run at predetermined times, enabling marketers to execute tasks such as data imports, exports, and email sends on a schedule.

Feature	Automation Studio	Journey Builder
Primary Purpose	Designed for automating marketing and data management tasks, creating complex, multi-step workflows for operational efficiency.	Focused on creating and managing customer journeys, allowing for personalized, multi-channel interactions based on customer behaviors and preferences.
Key Capabilities	- Automated email campaigns - Data import/export tasks - SQL queries for data segmentation - Scheduled and triggered automations	- Customer journey mapping - Multi-channel engagement (email, SMS, social media, etc.) - Real-time interaction triggers - Dynamic content personalization
Workflow Orientation	Task-oriented, ideal for backend data processing, repetitive marketing operations, and logistical workflows.	Customer-oriented, designed for front-end engagement, guiding customers through personalized marketing paths.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Feature	Automation Studio	Journey Builder
Use Cases	- Bulk email sends on a schedule - Data maintenance, cleansing, and synchronization - Reporting and analytics automation	- Customer onboarding sequences - Re-engagement campaigns - Event-driven interactions, such as abandoned cart emails
Integration & Data Sources	Heavily relies on internal and external data sources for triggering actions, managing lists, and segmenting data.	Primarily uses Salesforce data to trigger customer journeys but can incorporate external triggers for starting or branching paths.
Target Users	Marketers and data managers looking for a powerful tool to automate complex sequences of tasks beyond direct customer engagement.	Marketers focused on creating immersive and interactive customer experiences, emphasizing personalization and engagement across channels.



9. Analytics Builder

“Dive deep into the heart of your marketing data with Analytics Builder, where actionable insights pave the way for strategies that resonate and results that speak.”

Introduction to Analytics Builder in Salesforce Marketing Cloud

Analytics Builder in SFMC provides a robust framework for accessing, analyzing, and leveraging data across various marketing channels. It integrates seamlessly with other

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

components of SFMC, offering users a unified view of their marketing efforts and their impact on customer engagement and conversion.

Core Capabilities of Analytics Builder

1. Data Exploration: Offers tools for deep-diving into marketing data, allowing users to uncover trends, patterns, and anomalies.
2. Performance Reporting: Enables the creation of detailed reports on campaign performance, audience engagement, and ROI.
3. Custom Dashboard Creation: Users can build custom dashboards to visualize key performance indicators (KPIs) and metrics that matter most to their marketing objectives.
4. Predictive Analytics: Leverages AI and machine learning technologies to forecast future customer behaviors and campaign outcomes.
5. Utilizing Analytics Builder for Campaign Analysis

Understanding Campaign Performance

Key Metrics for Success: Discussion on essential metrics for evaluating campaign performance, including open rates, click-through rates, conversion rates, and ROI.

Creating Custom Reports: Step-by-step guide on generating custom reports in Analytics Builder to analyze campaign effectiveness across different dimensions (e.g., time, demographics, behavior).

Enhancing Audience Insights

Segmentation Analysis: How to use Analytics Builder to analyze the performance of different audience segments, identifying high-value segments for targeted marketing efforts.

Behavioral Analysis: Techniques for studying customer behaviors, such as purchase patterns and engagement with marketing channels, to refine targeting and personalization strategies.

Building Effective Dashboards

- Dashboard Design Principles: Review the key considerations for designing informative and actionable dashboards within Analytics Builder.
- Visualization Tools and Techniques: Various data visualization tools are available in Analytics Builder, including charts, graphs, and heat maps, to effectively communicate data insights.

Dominos Cards

Analytics Builder

- A component of Salesforce Marketing Cloud that offers comprehensive analytics and reporting tools, enabling marketers to measure campaign performance and gain insights into customer behavior.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Data Exploration

- The process of examining datasets to discover patterns or relationships, helping marketers understand the effectiveness of their campaigns and make data-driven decisions.

Custom Dashboards

- Tailor-made visual displays within Analytics Builder that aggregate and visualize key marketing metrics and KPIs, allowing for real-time monitoring and analysis.

10. Einstein

“Let Einstein illuminate the path to marketing brilliance, leveraging AI to predict, personalize, and perform at scale, transforming data into meaningful customer experiences.”

Einstein in SFMC integrates powerful AI capabilities across various aspects of the marketing suite, from predictive analytics and audience segmentation to content personalization and journey optimization. This integration allows marketers to harness machine learning, natural language processing, and other AI technologies to make smarter decisions and drive better outcomes.

Key Features of Einstein in SFMC

- Einstein Engagement Scoring: Predicts the likelihood of customers engaging with emails, mobile messages, and more, enabling targeted communication.
- Einstein Send Time Optimization: Determines the optimal send time for each individual customer, increasing open and engagement rates.
- Einstein Content Selection: Automates content personalization by recommending the most relevant content for each customer.
- Einstein Journey Insights: Provides insights into customer journey patterns, helping marketers to optimize the customer experience.

Leveraging Einstein for Enhanced Marketing Strategies

Personalizing Customer Experiences at Scale

Data-Driven Personalization: Utilize Einstein's AI to analyze customer data and deliver highly personalized marketing messages, offers, and content.

Dynamic Content Optimization: Implement Einstein Content Selection to dynamically personalize email and mobile content, ensuring that each customer receives the most engaging and relevant messages.

Optimizing Send Times and Engagement

Individualized Send Times: Employ Einstein Send Time Optimization to analyze customer behavior and pinpoint the exact time they are most likely to engage with communications.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Engagement Prediction: Use Einstein Engagement Scoring to segment audiences based on their predicted engagement level, tailoring strategies to maximize opens, clicks, and conversions.

Implementing AI-driven Analytics with Einstein

Gaining Deeper Insights into Customer Behavior

Journey Analytics: Analyze customer paths and interactions using Einstein Journey Insights to identify trends, drop-off points, and opportunities for journey optimization.

Predictive Analytics: Apply predictive models to forecast future customer behaviors, such as purchase likelihood or churn risk, informing proactive marketing actions.

Enhancing Reporting with AI

Automated Insights: Benefit from automated insights into campaign performance and customer engagement, allowing for quick adjustments and data-driven decision-making.

Custom AI Models: For specific business needs, explore the possibility of developing custom AI models within Einstein to uncover unique insights and opportunities.

Best Practices for Maximizing Value from Einstein in SFMC

Integrating Data for AI Analysis

Comprehensive Data Integration: Ensure that Einstein has access to a wide array of customer data from across channels and platforms for more accurate analysis and predictions.

Data Quality and Management: Maintain high standards of data quality and cleanliness to feed Einstein accurate and reliable data, enhancing the performance of AI models.

Continuous Learning and Adaptation

Iterative Testing and Learning: Continuously test and refine AI-driven strategies based on Einstein's insights and recommendations, adopting a mindset of ongoing optimization.

Skills Development: Invest in training and resources for your team to effectively leverage Einstein's capabilities, staying abreast of new features and best practices in AI-driven marketing.

Dominos Cards

Einstein AI

- Salesforce's artificial intelligence layer integrated within Marketing Cloud, offering predictive analytics, automated decision-making, and personalized content recommendations.

Einstein Engagement Scoring

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- A feature of Einstein AI that scores customers' likelihood of engaging with emails, mobile messages, etc., enabling targeted communication based on predicted behavior.

Einstein Send Time Optimization

- An Einstein AI feature that determines the optimal time to send messages to each individual customer, maximizing open rates and engagement.

11. AppExchange

“Explore the AppExchange to extend the boundaries of Salesforce Marketing Cloud, discovering tools and integrations that elevate your marketing efforts to new heights.”

Introduction to AppExchange for Salesforce Marketing Cloud

The Salesforce AppExchange provides a rich ecosystem of solutions that can help businesses enhance their marketing efforts, automate processes, and integrate SFMC with other systems and data sources. These solutions range from simple plug-and-play apps to comprehensive integration platforms and custom connector tools.

Benefits of Leveraging AppExchange for SFMC

- Extended Functionality: Discover apps and integrations that introduce new features and capabilities to SFMC, enabling more sophisticated marketing strategies.
- Efficiency and Automation: Find tools that automate repetitive tasks, streamline workflows, and save time for marketers.
- Customized Solutions: Access specialized solutions tailored to specific industries or marketing needs, enhancing the relevance and impact of marketing campaigns.

Key Considerations When Selecting AppExchange Solutions

Assessing Business Requirements

Identifying Gaps: Evaluate your current marketing processes to identify gaps or areas for improvement that AppExchange solutions could address.

Defining Objectives: Clearly define what you aim to achieve with additional solutions, whether it's enhancing customer engagement, improving analytics, or automating workflows.

Evaluating Solutions

Compatibility and Integration: Ensure that the solution integrates smoothly with SFMC and other systems you use.

Security and Compliance: Verify that the solution meets your security standards and complies with relevant data protection regulations.

Support and Development: Consider the provider's reputation, the level of support offered, and the solution's update frequency to ensure it will evolve with your needs.

Popular Categories of AppExchange Solutions for SFMC

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Integration Tools

CRM and ERP Integrations: Solutions that sync SFMC with CRM or ERP systems, enabling a unified view of customer data and streamlined operations.

Data Connectors: Tools that facilitate the integration of external data sources with SFMC, enhancing data-driven marketing efforts.

Analytics and Reporting Enhancements

Advanced Analytics: Applications that offer deeper insights into marketing performance, customer behavior, and predictive analytics.

Custom Reporting Tools: Solutions that provide enhanced reporting capabilities, customizable dashboards, and visualizations to better understand marketing outcomes.

Campaign Management and Optimization

Email Design Tools: Apps that offer advanced email design and testing capabilities, enabling marketers to create more engaging and effective emails.

Personalization and Segmentation: Solutions that enhance the ability to segment audiences and personalize content at scale, leading to more targeted and effective marketing campaigns.

Compliance and Security Solutions

Data Privacy Management: Tools that help manage consent, data retention, and compliance with regulations like GDPR and CCPA within SFMC.

Security Enhancements: Applications that provide additional layers of security, such as advanced encryption and access controls.

Implementing AppExchange Solutions in SFMC

Planning and Implementation

Trial and Testing: Leverage trial versions of solutions when available, and conduct thorough testing to ensure they meet your needs before fully implementing.

Change Management: Prepare your team for new tools and processes, ensuring proper training and support are in place to facilitate adoption.

Monitoring and Optimization

Performance Tracking: Monitor the performance and impact of implemented solutions on your marketing outcomes.

Continuous Improvement: Stay informed about updates to existing solutions and emerging tools on the AppExchange that could further enhance your SFMC setup.

Dominos Cards

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

AppExchange

- Salesforce's marketplace offering a variety of third-party applications, integrations, and solutions designed to extend the capabilities of Salesforce platforms, including Marketing Cloud.

Integration Tools

- Applications or services available on the AppExchange that facilitate the seamless integration of Salesforce Marketing Cloud with other systems, enhancing data flow and campaign management.

CRM Integration

- The process of connecting Salesforce Marketing Cloud with CRM (Customer Relationship Management) systems to synchronize customer data, providing a unified view of customer interactions.

12. Marketing Cloud Administration

“Master the art of SFMC administration to ensure seamless operation, stringent security, and optimal performance, empowering your team to focus on innovation and growth.”

Introduction to Administration in Salesforce Marketing Cloud

SFMC administration encompasses a broad range of tasks, from user management to data security and compliance. At its core, effective administration ensures that the right people have the right access to the tools and data they need, while also protecting sensitive information and maintaining system performance.

Core Responsibilities of SFMC Administrators

1. User Management: Creating user accounts, managing roles, and ensuring users have access to necessary resources.
2. Security and Compliance: Implementing security measures, managing data privacy, and ensuring the platform complies with relevant laws and regulations.
3. Data Management: Overseeing data import, export, storage, and cleanliness to maintain the integrity of marketing campaigns.
4. System Configuration: Customizing and configuring SFMC to meet the specific needs of the organization, including integration with other systems.

Managing User Roles and Permissions

Role-Based Access Control (RBAC): SFMC uses RBAC to define what actions users can perform within the platform. Understanding the predefined roles and how to customize them is crucial for effective administration.

Permissions and Permission Sets: Permissions determine access to specific features within SFMC. Administrators can group permissions into sets to streamline role assignment.

Creating and Assigning Roles

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Designing Custom Roles: Steps for creating custom roles that align with your organization's structure and workflow needs.

Best Practices for Role Assignment: Strategies for assigning roles to ensure users have access to necessary functionalities without over-privileging, reducing security risks.

Security and Compliance Management

Implementing Security Best Practices

Two-Factor Authentication (2FA): Importance of enabling 2FA for an additional layer of security and how to enforce it for all users.

Regular Audits and Reviews: Conducting regular audits of user roles and permissions, as well as system configurations, to ensure ongoing compliance and security.

Data Privacy and Regulatory Compliance

Understanding Data Protection Regulations: Overview of regulations like GDPR and how they impact SFMC administration.

Data Management Policies: Developing and enforcing data management policies that comply with legal requirements and best practices for data privacy.

Advanced Administration Strategies

Integration Management

Connecting SFMC with Other Systems: Guidelines for safely and efficiently integrating SFMC with external systems, including CRM platforms and analytics tools.

API Security: Best practices for managing API integrations, including monitoring usage and securing API keys.

Performance Optimization

Monitoring System Performance: Tools and techniques for monitoring SFMC's performance, identifying bottlenecks, and implementing optimizations.

Resource Management: Strategies for managing the allocation of resources within SFMC to ensure optimal performance and user experience.

Training and Support for Users

Developing Training Programs: Creating comprehensive training programs for different user roles to maximize their proficiency and efficiency in using SFMC.

Establishing a Support Framework: Setting up a support system for SFMC users, including helpdesk operations and escalation procedures for addressing issues.

Dominos Cards

Marketing Cloud Administration

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

- The process of managing and configuring Salesforce Marketing Cloud, including user roles, security settings, and data management, to ensure efficient operation and compliance.

User Roles and Permissions

- Configurations within Marketing Cloud that define what actions users can perform, ensuring they have appropriate access to the platform's features without compromising security.

Data Privacy and Compliance

- The adherence to data protection regulations (like GDPR) in managing customer data within Marketing Cloud, ensuring privacy and legal compliance.

Chapter 2 : CRM

<https://trailhead.salesforce.com/fr/users/strailhead/trailmixes/become-a-salesforce-admin-hero>

13. Salesforce CRM

« Unveil the power of Salesforce CRM, where every customer interaction becomes an opportunity to foster deeper connections, drive innovation, and sculpt unforgettable journeys »

13.1 Sales Cloud

Let's delve deeper into the content sections, enhancing the explanations and concepts to create a more comprehensive understanding of Salesforce Sales Cloud, with a focus on preparing participants for the Salesforce Administrator exam.

Introduction to Salesforce Sales Cloud

Salesforce stands as a beacon in the realm of customer relationship management (CRM) solutions, offering an expansive ecosystem designed to streamline business operations across various domains, including sales, customer service, marketing, and more. Sales Cloud, one of Salesforce's premier products, is tailored specifically for sales professionals, aiming to enhance sales productivity, lead management, and customer relationship building. By leveraging Sales Cloud, businesses can automate sales processes, manage leads and opportunities more effectively, and generate insights into sales performance through comprehensive reporting tools. This section provides learners with a solid foundation in Salesforce's architecture, emphasizing the significance of CRM and introducing the key functionalities and benefits of using Sales Cloud.

Setting Up and Customizing Sales Cloud

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Effective Salesforce administration hinges on the ability to customize the platform to fit a company's unique sales processes and workflows. This entails a thorough understanding of user management, including the creation and administration of users, roles, profiles, and permission sets, ensuring that the right people have the right level of access to the platform. Customization extends to configuring Salesforce objects, fields, and page layouts to mirror the business's sales pipeline and processes accurately. This involves tailoring the sales stages, managing record types, and setting up validation rules to maintain data integrity. This section equips participants with the knowledge to make informed decisions about customizing and configuring Sales Cloud to align with specific business requirements, thereby enhancing operational efficiency and user adoption.

Lead Management

Lead management is a critical component of the sales process, encompassing the identification, tracking, and nurturing of potential sales opportunities. Sales Cloud provides robust tools to capture leads from various sources, assign them to the appropriate sales personnel, and ensure they are followed up on in a timely manner. Participants will learn how to utilize web-to-lead forms to automatically capture leads into Salesforce, implement lead assignment rules to distribute leads based on predefined criteria, and effectively convert qualified leads into opportunities, contacts, and accounts. This section aims to streamline the lead management process, enabling sales teams to prioritize and engage with leads more efficiently to drive conversions.

Account and Contact Management

At the core of any CRM system is the management of accounts and contacts, which represents the foundation of building lasting customer relationships. Sales Cloud allows for detailed tracking and management of customer information, enabling sales representatives to have a 360-degree view of their interactions with customers. This section covers the creation and management of account and contact records, the importance of maintaining accurate and comprehensive data, and the methods for associating contacts with the correct accounts. Learners will understand how to leverage this information to foster stronger, more personalized relationships with customers, ultimately leading to improved customer satisfaction and loyalty.

Opportunity Management

Opportunity management is pivotal in tracking the progression of potential sales from initial contact through to a closed deal. Sales Cloud's opportunity management features allow sales teams to create and monitor opportunities, manage various sales stages, and utilize forecasting tools to predict sales outcomes. This section delves into the strategies for effectively managing opportunities, including setting up and customizing opportunity stages, using products and price books to attach pricing information to opportunities, and understanding the role of forecasting in sales planning. Participants will gain insights into optimizing the sales pipeline for maximum efficiency and accuracy in sales forecasting.

Product and Price Books

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Understanding and managing the complex dynamics of products and pricing within Sales Cloud is essential for tailoring sales solutions to meet customer needs. This section explores how to set up and manage products, price books, and schedules, enabling sales teams to offer accurate quotes and flexible pricing options to their customers. Participants will learn how to associate products with opportunities, manage multiple price books for different market segments or customer types, and apply discounts and quantities to products within opportunities. This knowledge is crucial for sales representatives to create competitive and customized proposals that meet both the business's and customers' requirements.

Reports and Dashboards

Data-driven decision-making is at the heart of successful sales strategies. Sales Cloud's powerful reporting and dashboard capabilities provide real-time insights into sales performance, customer trends, and operational efficiencies. This section covers the fundamentals of creating custom reports, designing informative dashboards, and utilizing analytics to uncover opportunities for improvement. Learners will understand how to leverage Salesforce reports and dashboards to track key sales metrics, identify trends, and make informed decisions that drive sales success and organizational growth.

Advanced Customization and Security Model

Understanding Salesforce's robust security model is paramount for protecting data and ensuring that users have appropriate access to the resources they need. This involves a deep dive into organization-wide defaults (OWDs), role hierarchies, sharing rules, and field-level security to control access to data at various levels. Customization also extends into advanced configurations such as formula fields, validation rules to enforce data integrity, and the creation of custom objects to tailor Salesforce to specific business requirements. Participants will explore how to design and implement a security model that safeguards data while facilitating collaboration and access as needed.

Advanced Automation Techniques

Salesforce automation tools, including Workflow Rules, Process Builder, and Flow, offer powerful ways to streamline business processes, improve efficiency, and enhance user experiences. This section goes beyond basic automation to explore complex automation scenarios that can address sophisticated business requirements. Learners will engage with scenario-based exercises to design and implement automation solutions that can handle multi-step processes, conditional logic, and integrate with external systems. This understanding is critical for maximizing the utility of Sales Cloud and driving significant productivity gains within sales operations.

Salesforce Lightning Experience

The Lightning Experience, Salesforce's modern UI, provides a highly customizable and interactive environment designed to enhance productivity and user engagement. This part of the training focuses on leveraging the Lightning Experience to improve sales processes, including the use of Lightning components, app builder, and Lightning record pages to create a more dynamic and intuitive user interface. Participants will learn how to migrate from

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Salesforce Classic to Lightning, customize the Lightning interface to meet user needs, and utilize Lightning-specific features to boost sales team performance.

Data Management and Quality

Maintaining high data quality is essential for the accuracy of reporting, forecasting, and decision-making processes. This segment covers strategies and tools for importing, exporting, cleaning, and maintaining data within Salesforce. Participants will become familiar with data loader and duplicate management tools to ensure data integrity and cleanliness. They will also learn best practices for data management, including regular data audits and cleansing routines, to maintain a high-quality database that supports effective sales activities.

Integration and AppExchange

Salesforce's ability to integrate with external applications and services expands its functionality and allows for a more unified technology ecosystem. This section introduces the basics of Salesforce integrations, including the use of APIs, middleware, and Salesforce connectors. Additionally, it covers navigating the Salesforce AppExchange to find and install third-party applications that can extend the functionality of Sales Cloud to meet unique business needs. Participants will explore case studies demonstrating effective integration and AppExchange strategies that enhance Sales Cloud capabilities and drive business value.

Sales Cloud Einstein - Artificial Intelligence for Sales

Sales Cloud Einstein brings the power of artificial intelligence to the Salesforce platform, enabling sales teams to predict outcomes, gain insights into customer behavior, and automate routine tasks. This section will cover how Einstein can prioritize leads and opportunities based on their likelihood to convert or close, offer predictive forecasting for more accurate sales projections, and provide personalized recommendations to enhance sales strategies. Participants will learn how to leverage Einstein's AI capabilities to make smarter decisions and increase sales efficiency.

Territory Management

Effective territory management is vital for optimizing sales efforts and resource allocation. This module explores the setup and management of sales territories within Sales Cloud, including territory models, territory types, and assignment rules. Trainees will understand how to structure territories based on geographic regions, product lines, industry sectors, or customer sizes and how to use territory management to improve sales coverage and performance.

Building on the basic concepts of lead management, this section delves into advanced lead scoring mechanisms that allow sales teams to prioritize leads more effectively. Participants will explore how to set up custom lead scoring models, incorporating both implicit and explicit scoring criteria, to better identify high-potential leads. This includes understanding the

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

behavioral and demographic factors that indicate lead readiness and how to automate lead scoring in Sales Cloud.

Custom Reporting and Analytics

While the basics of reports and dashboards are covered earlier, this module takes a deeper look at custom report types, advanced analytics, and the capabilities of Salesforce's Tableau CRM (formerly Einstein Analytics). Trainees will learn how to create complex reports that span multiple objects and involve custom formulas, as well as how to visualize data through interactive dashboards and analytics apps. This knowledge is crucial for uncovering actionable insights that can drive sales strategy and business growth.

Technical Mastery and Platform Customization

Salesforce Object Query Language (SOQL) and Salesforce Object Search Language (SOSL)

Understanding how to query and search data is fundamental for custom development and data analysis within Salesforce. This section introduces participants to SOQL and SOSL, teaching them how to write queries to retrieve specific data sets from the Salesforce database. This includes understanding the differences between SOQL and SOSL, when to use each, and how to integrate queries into custom applications and reports.

Apex and Visualforce Basics

For those looking to extend Salesforce beyond out-of-the-box capabilities, a basic understanding of Apex, Salesforce's proprietary programming language, and Visualforce, its framework for building custom user interfaces, is essential. This module provides an introduction to writing simple Apex triggers for custom business logic and creating Visualforce pages for custom views. Though not required for the Administrator exam, this knowledge is valuable for understanding the possibilities of custom development in Salesforce.

Lightning Web Components

As Salesforce moves towards a more modern development framework, Lightning Web Components (LWC) represent the future of custom UI and functionality on the platform. This section offers an overview of LWC, including how to build and deploy components that enhance the user experience and offer custom functionality within the Salesforce Lightning Experience. Participants will gain insights into the basics of component-based architecture, web standards, and how to leverage JavaScript skills in Salesforce development.

Strategic Account Planning and Management

Understanding and executing strategic account planning within Sales Cloud is critical for managing key accounts effectively. This section will delve into methodologies for identifying high-value accounts, assessing account needs, and developing tailored account strategies. Participants will learn to leverage account hierarchies, custom fields, and related lists to

track complex account relationships and to use collaborative forecasting to align sales efforts with account potential.

Deep Integration with Marketing and Service Clouds

Sales Cloud does not operate in isolation; it's part of a larger ecosystem within Salesforce. A detailed exploration of how Sales Cloud integrates with Marketing Cloud and Service Cloud provides a 360-degree view of the customer journey. This includes automating lead nurturing campaigns, tracking customer interactions across touchpoints, and providing seamless customer service experiences. Understanding these integrations enables users to create a cohesive customer experience, improve lead conversion rates, and foster customer loyalty.

Custom Application Development on the Salesforce Platform

Going beyond standard customization, this part of the training focuses on developing custom applications using the Salesforce Platform. This includes an in-depth look at the model-view-controller (MVC) architecture, advanced Apex coding for business logic, Visualforce pages for custom UIs, and Lightning Web Components for creating modern web apps. This knowledge enables participants to extend Sales Cloud beyond out-of-the-box functionalities to meet unique business requirements.

Implementing Best Practices for Change Management

Adopting Sales Cloud or making significant changes within the platform requires careful planning and execution to ensure success and minimize disruption. This section covers best practices for change management within Salesforce implementations, including stakeholder engagement, training strategies, and deployment methodologies. Participants will learn about sandboxes for safe testing, change sets for deploying configurations, and tools like Salesforce DX for version control and continuous integration.

Navigating Complex Sales Processes and CPQ

For businesses with complex sales cycles, configuring, pricing, and quoting (CPQ) software within Salesforce offers solutions for automating sales quotes and orders. This part of the training will explore how to set up and use Salesforce CPQ to manage complex product catalogs, pricing rules, and approval processes, ensuring accuracy and efficiency in sales operations.

Global Deployment and Multi-Currency Considerations

Organizations operating on a global scale face unique challenges in managing sales operations across different regions. This segment addresses the setup and management of multiple currencies, translation workbenches for localizing content, and configuring global sales processes within Sales Cloud. Participants will gain insights into designing a Salesforce environment that supports global business requirements while maintaining local relevancy.

Ethical Use and Data Privacy Compliance

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

With increasing focus on data privacy and compliance, it's imperative for Salesforce users to understand their responsibilities. This section highlights ethical considerations in managing customer data, ensuring compliance with regulations like GDPR and CCPA. Participants will learn about data protection tools, privacy settings, and best practices for maintaining customer trust and legal compliance.

Preparing for the Future: Trends and Innovations in CRM

The CRM landscape is continuously evolving, with new technologies and trends emerging regularly. This final section looks forward, exploring upcoming innovations in CRM and how they might impact Sales Cloud and Salesforce administration. Topics such as artificial intelligence, machine learning, blockchain, and the role of CRM in customer experience management will be discussed, preparing participants for the future of sales and CRM technology.

Sales Cloud Dominos Cards

Salesforce's CRM platform designed to support sales processes, including lead management, opportunities, sales forecasting, and performance analytics, enabling sales teams to track and grow their sales pipelines efficiently.

Opportunity Management

A feature within Sales Cloud that allows sales teams to manage sales opportunities, track deal progress, and analyze sales pipelines, helping to forecast sales and prioritize efforts.

Lead Scoring

The process of assigning values to leads based on their behavior and profile information to prioritize follow-up by sales representatives, facilitating more effective lead conversion strategies within Sales Cloud.

13.2 Service Cloud

Introduction to Salesforce Service Cloud

This section introduces Salesforce Service Cloud as a comprehensive customer service solution designed to improve customer satisfaction, increase efficiency, and drive customer loyalty. Participants will learn about the architecture of Service Cloud, including its integration within the Salesforce ecosystem, and the primary benefits of using Service Cloud for managing customer support operations. Key features such as case management, Service Console, omni-channel routing, and knowledge management will be outlined, providing a solid foundation for understanding Service Cloud's capabilities.

Setting Up Service Cloud

This part of the training covers the initial setup and configuration of Service Cloud, including user roles, profiles, and permissions specific to customer service operations. It delves into

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

setting up the Service Console, customizing it to fit various support processes, and configuring case management features to streamline the handling of customer issues. Additionally, participants will explore how to set up omni-channel routing to efficiently distribute cases across support channels and agents, ensuring that customer inquiries are addressed promptly and by the most qualified agents.

Advanced Case Management

Building upon basic case management concepts, this section dives deeper into advanced features and best practices for managing customer cases. Topics include configuring case escalation rules to ensure timely resolution, implementing case assignment rules for automatic distribution, and utilizing case teams for collaborative case resolution. Participants will also learn about custom case fields and record types to capture detailed case information, and how to leverage case feeds for communication within the support team and with customers.

Implementing Service Cloud Einstein

This module introduces Service Cloud Einstein, showcasing how AI can transform customer service operations. Participants will explore Einstein Case Classification for automatic case categorization, Einstein Article Recommendations for quicker resolution times, and Einstein Bots for automating routine customer inquiries. The training will cover how to set up and customize these AI features to meet specific business needs, driving efficiency and personalization in customer interactions.

Knowledge Management

Effective knowledge management is crucial for quick and accurate customer service. This section covers the setup and management of Salesforce Knowledge, including article creation, categorization, and publication. Trainees will learn how to implement a knowledge base that serves both agents within the Service Console and customers via self-service portals and communities. Best practices for maintaining and updating the knowledge base to ensure relevance and accuracy will also be discussed.

Customizing the Service Console

The Service Console is the centerpiece of agent productivity in Service Cloud. This module takes a comprehensive look at customizing the Service Console with components, utilities, and tabs to streamline the agent experience. Participants will learn about integrating external applications, setting up macros for repetitive tasks, and utilizing Lightning Flow to guide agents through complex processes, all within the console.

Omnichannel Customer Service

In today's digital age, customers expect support through various channels, including phone, email, chat, social media, and self-service portals. This section explores the setup and management of omnichannel capabilities in Service Cloud, ensuring that agents can provide

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

seamless support regardless of the communication channel. Topics include configuring omnichannel routing, setting up chat and messaging, integrating social media for social customer service, and deploying self-service portals and communities for customer self-help options.

Analytics and Reporting for Service

Understanding service performance and customer satisfaction requires robust analytics and reporting. This module covers the creation of custom reports and dashboards specific to service metrics, such as case volume, resolution times, agent productivity, and customer satisfaction scores. Participants will learn how to use Tableau CRM (formerly Einstein Analytics) for advanced analytics, gaining deeper insights into service operations and identifying opportunities for improvement.

Implementing and Managing Field Service

For organizations providing on-site services, Salesforce Field Service is a critical component of delivering exceptional customer service. This section addresses the configuration and management of Field Service, including setting up work orders, managing service appointments, optimizing mobile workforce scheduling, and utilizing the Field Service mobile app. Participants will explore how to ensure efficient and effective field service operations, enhancing customer satisfaction and operational efficiency.

Service Cloud Integration and Extensibility

To fully leverage Service Cloud within a broader technology ecosystem, understanding integrations and custom development is key. This part of the training explores integrating Service Cloud with external systems and applications, using APIs, middleware, and AppExchange solutions. Additionally, participants will learn about custom development options, including Apex and Visualforce for backend logic and custom interfaces, and Lightning Web Components for creating modern, web-standard user experiences.

Advanced Case Management Techniques

Dive deeper into the automation of case assignment using advanced techniques, ensuring the right cases are matched with the most qualified agents based on skill level, availability, or case complexity. Explore the use of dynamic queues and AI-driven insights for prioritizing case workloads. Understand how to implement advanced case routing and escalation protocols that automatically adjust based on changing customer needs or service level agreements (SLAs).

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Personalized Customer Service with AI

Expand on Service Cloud Einstein by integrating more AI functionalities, such as predictive analytics for forecasting customer issues and automated suggestions for case resolutions based on historical data. Explore the customization of Einstein Bots for various service scenarios, enhancing customer self-service options with intelligent, conversational AI. Learn to deploy AI-powered analytics to track customer sentiment and satisfaction in real-time, enabling proactive service adjustments.

Service Cloud Voice Integration

Examine the integration of Service Cloud Voice, offering a unified agent and telephony experience within the Service Console. Understand the setup and management of telephony integrations, call routing, and voice transcription services. Learn to leverage real-time transcription and AI-powered insights to guide agents during calls, improving first-call resolution rates and overall customer satisfaction.

Implementing Advanced Knowledge Management

Beyond basic article management, explore advanced strategies for curating a dynamic, AI-enhanced knowledge base. Discuss the importance of a content lifecycle, from creation and review to publication and archiving, ensuring information remains relevant and up-to-date. Learn to implement feedback loops for continuous improvement of knowledge articles, and explore integration options to make knowledge accessible across multiple platforms and customer touchpoints.

Extending Service with Mobile Solutions

Delve into Salesforce Mobile SDK and Field Service Lightning mobile app customization to provide service agents and field technicians with powerful tools on the go. Cover the design of mobile-optimized service interfaces, offline capabilities for remote access to service data, and the use of mobile device features (like camera and GPS) to enhance service delivery and customer engagement.

Comprehensive Service Analytics

Explore the full capabilities of Tableau CRM within Service Cloud, learning to construct complex data models, interactive dashboards, and predictive analytics reports. Cover the integration of external data sources for a holistic view of customer interactions across platforms. Discuss how to use analytics insights to drive strategic decisions in service operations, customer engagement strategies, and continuous service improvement.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Service Cloud for Industry-Specific Solutions

Investigate the customization and application of Service Cloud in specific industry contexts such as healthcare, financial services, government, and retail. Understand the unique challenges and opportunities in these industries, and how Service Cloud features can be adapted or extended to meet specific regulatory, operational, or customer experience requirements.

Global Service Operations

Address the complexities of providing customer service on a global scale, including multi-language support, cultural nuances, and regional compliance issues. Explore strategies for managing a global service team, including shift planning, regional expertise sharing, and the use of Salesforce's global infrastructure to ensure consistent, high-quality service delivery worldwide.

Preparing for Future Service Challenges

Discuss emerging technologies and trends that may impact customer service in the future, such as augmented reality (AR) for remote service, blockchain for customer data security, and the evolving role of social media in customer service. Prepare participants to think strategically about integrating new technologies into their service operations and to stay agile in a rapidly changing service landscape.

Technical Architecture of Service Cloud

Begin with an overview of the multi-tenant architecture that underpins Salesforce, including how it impacts data security, scalability, and upgrades. Dive into the technical structure of Service Cloud, focusing on the database model, object relationships, and the event-driven architecture that enables real-time service updates and notifications. This foundation is critical for understanding how customizations and integrations affect the overall system performance and security.

Advanced Apex and Visualforce in Service Cloud

Go beyond basic Apex triggers and classes to explore complex Apex code patterns for automating service processes, handling bulk data operations safely, and creating efficient, scalable solutions. Delve into advanced Visualforce page development for creating custom service interfaces, integrating with external services, and enhancing the agent and customer experience within the Service Console. Cover best practices for test-driven development in Apex, ensuring code coverage and maintainability.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Lightning Web Components for Service

Introduce the modern standards-based framework of LWC for developing fast, efficient, and reusable components within Service Cloud. Cover the core concepts, such as the component lifecycle, data binding, and event handling, and how these relate to service operations. Explore advanced topics, such as communicating between components, leveraging Salesforce data with wire services, and integrating third-party libraries. Discuss the deployment of LWC in the Service Console and on Salesforce Experience Cloud sites for a unified customer service experience.

Integration Patterns and Practices

Cover the various integration patterns available for Service Cloud, including real-time, batch, and event-driven integrations. Dive into the use of Salesforce APIs (REST, SOAP, Bulk, Streaming) for different integration scenarios, and how to manage authentication and authorization with OAuth. Explore middleware solutions and Salesforce Connect for integrating external data sources as virtual objects within Salesforce. Discuss error handling, logging, and monitoring practices to ensure integration reliability and performance.

Utilizing Salesforce APIs for Service Automation

Focus on the practical use of Salesforce APIs for automating service tasks, updating customer records in real-time, and syncing data between Salesforce and external systems. Explore specific use cases, such as creating cases from IoT device signals, automating case updates from external support systems, and integrating AI-powered chatbots for enhanced customer self-service options. Discuss API limits, best practices for API usage, and strategies for optimizing API calls for efficiency and scalability.

Salesforce DX and CI/CD for Service Cloud

Introduce Salesforce DX as a tool for source-driven development, enabling more collaborative and efficient development practices for Service Cloud customizations. Cover the setup and use of scratch orgs for isolated development and testing, version control integration, and package-based deployment. Discuss the configuration of CI/CD pipelines using tools like Jenkins, GitHub Actions, or GitLab CI/CD to automate the build, test, and deployment processes, ensuring high-quality and consistent updates to Service Cloud.

Advanced Analytics and AI in Service Cloud

Explore the capabilities of Tableau CRM (Einstein Analytics) within Service Cloud for creating custom analytics apps, dashboards, and predictive models. Discuss how to use Einstein Discovery to automatically analyze service data, identify trends, and predict customer satisfaction drivers. Explore integrating Einstein AI models into service processes for automated case categorization, routing, and resolution recommendation, enhancing efficiency and personalization of customer service.

Security Best Practices in Service Cloud

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Deep dive into Salesforce security features and best practices specific to Service Cloud. Cover topics such as field-level security, sharing rules, and user permissions for protecting sensitive service data. Discuss the use of platform encryption, event monitoring, and transaction security policies to safeguard service operations and customer information. Explore considerations for secure app development, including secure coding practices, vulnerability testing, and third-party security assessments.

Complex System Integrations and Microservices Architecture

Explore the design and implementation of microservices architecture for creating highly scalable and maintainable integrations with Service Cloud. Discuss the principles of microservices, such as decentralized data management, fault isolation, and continuous delivery, and their advantages for integrating large-scale, complex systems. Learn how to use Salesforce's API Gateway for managing microservices, ensuring secure and efficient communication between Salesforce and external services.

Advanced Data Management and Governance

Dive deep into the strategies for managing large volumes of data within Salesforce, focusing on data storage optimization, archiving solutions, and data lifecycle management. Explore the use of Big Objects for handling massive datasets and implementing data retention policies compliant with industry regulations. Discuss the establishment of governance policies for data quality, data security, and data sharing within and outside the Salesforce platform.

Performance Optimization Techniques

Cover performance analysis tools and techniques within Salesforce to identify bottlenecks and areas for improvement. Discuss best practices for optimizing Apex code, SOQL queries, and Visualforce pages to reduce execution times and improve response rates. Explore Lightning Component Performance best practices, including efficient data fetching, lazy loading, and minimizing re-rendering for enhanced user experiences in the Service Console.

Artificial Intelligence and Machine Learning Innovations

Investigate the cutting-edge AI and machine learning capabilities within Salesforce and how they can be applied to Service Cloud for predictive analytics, natural language processing, and automated decision-making. Explore custom AI model development using Salesforce Einstein Platform Services and integrating external AI services through APIs. Discuss practical applications, such as sentiment analysis for customer interactions, predictive case routing, and personalized service recommendations, to drive customer satisfaction and operational efficiency.

Salesforce Blockchain for Secure Customer Interactions

Introduce the concept of blockchain within the Salesforce ecosystem and its application in creating secure and transparent customer service processes. Explore use cases for Salesforce Blockchain in Service Cloud, such as verifying customer identities, securing transaction records, and managing warranties or service agreements. Discuss the technical

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

setup of blockchain networks, smart contracts, and integrating blockchain data with Service Cloud records for enhanced customer trust and security.

Exploring Salesforce Genie in Service Cloud

Delve into Salesforce Genie, the real-time data platform that powers Customer 360, and its integration with Service Cloud. Explore how Genie collects and processes data from various sources in real-time, enabling personalized and context-aware customer service interactions. Discuss the implementation of Genie for real-time customer insights, predictive service needs, and dynamic case management, ensuring that service agents have the most up-to-date and comprehensive view of each customer.

Developing Custom Service Cloud Apps with Heroku

Cover the integration of Service Cloud with Heroku, Salesforce's platform as a service (PaaS) offering, for building and deploying custom service applications. Explore the development of custom service apps using Heroku's support for multiple programming languages, its app marketplace, and its seamless integration with Salesforce data. Discuss how to leverage Heroku to create highly scalable and flexible service solutions that complement Service Cloud functionalities.

Next-Generation Customer Service with IoT Integration

Examine the integration of IoT devices and platforms with Service Cloud to revolutionize customer service. Learn how to set up Salesforce IoT to ingest, process, and act on data from connected devices, enabling proactive service actions, such as predictive maintenance and automated case creation. Discuss the technical architecture of Salesforce IoT, including event management, context establishment, and executing actions based on predefined rules and customer data.

Utilizing Salesforce Flow for Advanced Automation

Deep dive into the capabilities of Salesforce Flow, Salesforce's powerful automation tool, beyond basic use cases. Explore advanced techniques for automating complex business processes, including dynamic case routing based on AI predictions, automated customer communication sequences, and integration flows that synchronize Service Cloud data with external systems in real-time. Discuss best practices for designing, testing, and deploying flows to ensure they are efficient, scalable, and maintainable.

Exploring Voice and Video Integration

With digital communication channels evolving, integrating voice and video directly within Service Cloud offers a more personal and effective way to connect with customers. Explore the technical setup and best practices for embedding voice and video calls into the service process, including WebRTC technology, third-party integration tools, and Salesforce's own solutions. Discuss how to leverage these technologies for virtual customer support centers, remote diagnostics, and personalized customer interactions.

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

Advanced Custom UIs with Lightning Web Components

Building on basic LWC knowledge, explore the creation of advanced custom user interfaces for the Service Console and customer portals. Dive into complex component composition, efficient state management, and leveraging Salesforce's Lightning Design System for consistency and responsiveness. Cover the use of modern JavaScript and CSS techniques to enhance UI performance and user experience, and how to make components dynamic and data-driven with Salesforce records.

Implementing and Leveraging MuleSoft for Integration

MuleSoft, as a part of the Salesforce ecosystem, offers robust capabilities for connecting Salesforce with external applications, data sources, and devices. Explore how to use MuleSoft's Anypoint Platform to design, build, and manage complex integrations that extend the capabilities of Service Cloud. Cover scenarios such as synchronizing customer data across platforms, integrating legacy systems with Salesforce, and automating data flows that enhance customer service processes.

Salesforce Blockchain for Enhanced Customer Verification

With blockchain technology becoming more accessible, its application within customer service processes can offer new levels of verification and trust. Explore how Salesforce Blockchain can be utilized within Service Cloud to verify customer identities, secure transaction records, and ensure the authenticity of customer-related documents. Discuss the technical setup of blockchain networks, the creation and management of smart contracts, and practical use cases within service industries.

Predictive Analytics and Machine Learning with Tableau CRM

Dive into the advanced capabilities of Tableau CRM (formerly Einstein Analytics) within the Salesforce ecosystem for predictive analytics and machine learning. Explore how to build custom predictive models that can forecast customer service needs, identify trends in customer satisfaction, and automate decision-making processes within service workflows. Discuss data preparation techniques, model training, and integration of predictive insights directly into the service console and agent workflows.

Advanced Security Models for Service Cloud

In-depth exploration of Salesforce's security features tailored for protecting sensitive customer service data. Discuss advanced topics such as implementing field-level encryption,

Molengeek International

Salesforce Cloud
KA220-VET-C971A987

setting up Event Monitoring and Transaction Security policies, and managing user authentication with Salesforce Identity. Explore strategies for complying with global data protection regulations (e.g., GDPR, CCPA) within Service Cloud, including data residency considerations and customer consent management.

Service Cloud (Dominos Cards)

- Salesforce's customer service platform offering tools for case management, omnichannel communications, and automated service processes, aiming to improve customer satisfaction and service efficiency.

Case Management

- A functionality within Service Cloud that enables service teams to track, manage, and resolve customer issues and inquiries through a centralized system, enhancing response times and service quality.

Omnichannel Routing

- A feature in Service Cloud that automatically assigns customer cases to the most appropriate service agent based on availability, skill set, and channel preference, ensuring efficient and personalized customer service.

Let's Compare Sales & Service Cloud

Feature/Functionality	Sales Cloud	Service Cloud
Primary Focus	Enhancing sales processes and managing the sales pipeline.	Providing customer support and managing customer service operations.
Key Features	- Lead and Opportunity Management - Sales Forecasting - Quotes and Contracts - Products and Price Books - Reports and Dashboards for Sales	- Case Management - Omnichannel Routing - Service Contracts and Entitlements - Knowledge Base - Reports and Dashboards for Service
User Base	Sales professionals and teams looking to streamline their sales processes and increase efficiency.	Customer service agents and managers needing to optimize customer support and improve satisfaction.
Integration Focus	Primarily integrates with marketing and lead generation tools to nurture leads through the sales funnel.	Often integrates with external communication platforms (e.g., telephony systems, chat tools) for comprehensive customer service.
Customization	Extensive customization options for tailoring the sales process, including custom fields, objects, and automation workflows specific to sales activities.	High level of customization for service processes, including case management workflows, service level agreements, and customer support channels.

Feature/Functionality	Sales Cloud	Service Cloud
Analytics and Reporting	Advanced reporting features focused on sales metrics, pipeline analysis, and forecasting to drive sales strategy and performance improvement.	Detailed service analytics, including case resolution times, customer satisfaction scores, and agent performance metrics, to enhance service quality.
Automation Capabilities	Automation of sales tasks such as lead assignments, follow-ups, and deal closure activities to increase sales productivity.	Automation of service tasks like case routing, escalation rules, and service processes to improve response times and service consistency.
Collaboration Tools	Tools designed to facilitate collaboration among sales teams, such as shared calendars, files, and opportunity discussions.	Features aimed at enhancing collaboration within service teams and across departments for resolving customer issues efficiently.
Primary Goal	To close more deals faster and increase revenue.	To resolve customer issues effectively, increase customer satisfaction, and maintain loyalty.