

LEARNING MADE EASY



Salesforce[®] Marketing Cloud

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Define and optimize your
customers' journey

Navigate and manage the
dashboards, reports, and more

Engage your customers
across devices

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Salesforce[®] Marketing Cloud

by Chester Bullock
and
Mark Pollard

for
dummies[®]
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Salesforce® Marketing Cloud For Dummies®

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Introduction

Ever since that first corporate website found its way onto the Internet, the marketing universe has been expanding and changing. One after another, things such as text-message marketing campaigns, social media marketing, and mobile apps have come on the scene. Suddenly, even email marketing — which was in its infancy only a generation ago — is now just the tip of the iceberg of what today’s marketers need to know how to do.

Fortunately, sophisticated tools, such as Salesforce Marketing Cloud, have evolved at the same time to help you manage all these marketing channels. Marketing Cloud makes an online marketer into a superhero. But, of course, it has its own learning curve. That’s where this book comes in: We want to show you around a product that we adore, help you get started, and sprinkle in a few insider tips that we’ve picked up over time.

About This Book

This book is born of love. We both had the pleasure to be actively involved in the early development of the software that is now known as Salesforce Marketing Cloud, and the experience led to career opportunities and new friendships. Rarely do you have the opportunity to work with such talented people, all of whom are dedicated to their clients’ success.

Now we’re thrilled to have the chance to share our knowledge — and dare we say wisdom — about Salesforce Marketing Cloud and online marketing in general. We’ve been accumulating experience for close to a decade. With the help of *Salesforce Marketing Cloud For Dummies*, we can transfer what you need to know so you can hit the ground running on your own Marketing Cloud adventure.

Like all the titles in the *Dummies* series, this book provides tools for people who are confident enough to say, “I don’t know what I’m doing (yet).” We give you no-nonsense answers to how to think about your audiences and data, as well as practical step-by-step procedures to get your marketing messages out the door.

You can read this book from cover to cover, or jump directly to an individual chapter about the functionality you're currently working on. Marketing Cloud contains many apps, so keep this book nearby for a quick refresher when you need to get back into a part of the tool that you haven't used in a while.

Foolish Assumptions

You can tell from the title that we wrote this book for people who are new to using Salesforce Marketing Cloud, including Basic, Pro, Corporate, and Enterprise Editions. However, almost anyone interested in learning more about online marketing can find useful information within. Any time you write instructions, though, you have to make a few assumptions. In your case, we assume the following:

- » You're familiar with how to operate a computer, a keyboard, and a mouse.
- » You've used enough software to recognize conventions such as opening menus, clicking buttons, and pausing your mouse pointer on something to make a tooltip appear.
- » You know the definitions of words such as *email*, *URL*, and *social media*.

If any of these assumptions leave you scratching your head, we recommend visiting your local library, where a librarian can point you in the right direction.

Icons Used in This Book

You'll see the following icons as you read the chapters of this book. This section describes what they mean.



TIP

The Tip icon indicates a tidbit of information that may not be necessary to the procedure you're working on but may make things easier.



REMEMBER

Remember icons refer to information that we talked about before but that's especially important to recall at this point in the chapter.



TECHNICAL
STUFF

Technical Stuff gives you a peek at how the Marketing Cloud application works behind the scenes. You can skip over this information and still use the product just fine, but reading and understanding it will help you know what to expect from Marketing Cloud.



WARNING

The Warning icon means watch out! It tells you when doing something wrong could damage your data or put your sensitive information at risk.

Beyond the Book

Salesforce Marketing Cloud has a large online documentation site. You can click a link right inside Marketing Cloud to get to the documentation. (An Internet search will probably get you there as well.) You'll find a lot of the same information in the documentation that you see in this book, but there are definite benefits to reading the book. We have the freedom, for example, to point out things that don't work as you might expect them to and suggest shortcuts.

We've provided a few handy cheat sheets: a glossary of terms, a sample pre-sending checklist, and a diagram to help you when you're mapping out your customer journeys — it'll make more sense when you get there! To get to the cheat sheet, go to www.dummies.com, and then type *Salesforce Marketing Cloud For Dummies cheat sheet* in the Search box. This is also where you'll find any significant updates or changes that occur between editions of this book.

Where to Go from Here

Salesforce Marketing Cloud is more like a platform than an application. That is to say, Marketing Cloud has a few bits of its own functionality, but the real power of your account is in the apps you can open in the Marketing Cloud platform.

The first part of this book is about getting around the Marketing Cloud platform itself and using the tools available there. If this is the first time you've used Marketing Cloud, you'll definitely want to start here.

The second part of this book is about subscriber data: understanding what you already know about your customers, figuring out what you need to learn about your customers to execute the best campaigns, and setting up Marketing Cloud to hold and use that data. Don't miss this part if you're an admin or in charge of designing the over-arching journey your customers take while interacting with your brand. Having said that, we'll also say that anyone at any level of the organization can get a better foundation in where your data comes from and how you use it by reading the chapters in this part.

Most of the rest of the chapters dive deep in to the day-to-day operation of each of the apps. If you're just getting started using one of the apps, your next stop is the table of contents to find the chapter about the app you're learning about.

Whichever page you turn to next, we hope that it is the first page in an epic story of you and Salesforce Marketing Cloud. May your story find your customer delighted, your company thriving, and you enjoying accolades for your sophisticated and well-managed online marketing campaigns.

1 Getting Started

IN THIS PART . . .

Take a walk through the history of online marketing to get to the technology we have today.

Understand how the power of data lets online marketers create specific messages tailored to each customer.

Envision how you can automate repetitive tasks to free yourself for creative problem solving.

Meet Salesforce Marketing Cloud: online marketing platform and home to at least a dozen useful apps.

Tour Marketing Cloud's administrative screens.

- » Understanding email marketing
- » Learning about customer journeys
- » Understanding how Salesforce Marketing Cloud fits into customer journeys

Chapter **1**

Introducing the One-to-One Customer Journey

Email marketing has grown into a direct marketing powerhouse. Because you have access to so much data about the people you're sending emails to, you can create automation that tailors your messages to each customer's unique needs and circumstances. Email marketing not only delivers marketers unparalleled value but also ensures that customers actually want to read the messages they receive from you.

No other marketing channel is so customizable at such an affordable price. You can personalize the content of your email even more than the content in a direct mailer, plus your email doesn't require printing or postage, isn't subject to the mail delivery schedule, and doesn't use paper. At the same time, your email marketing campaigns can be as broad reaching as a television commercial because, after you've set up your marketing campaigns, each additional email might add only a fraction of a second to send.

Add to this the capability to get feedback on your campaigns through testing and then to use that feedback to optimize the campaigns going forward, and there is no question why email marketing continues to drive so much business.

Over time, Salesforce Marketing Cloud has added communication channels to supplement your email marketing campaigns. Now you can use Marketing Cloud as the central place to manage all the components of your online marketing campaigns, including web pages, text messages, and your Facebook page.

The Dawn of the Customer Journey

We're at a tipping point in digital marketing, where data, tools, and predictive analytics are coming together to drive a concept known as the *customer journey*. Before we can dive into the depths of modern-day customer journeys, however, we need to take you on a journey of our own. We're going to go back to where it began — email marketing — to understand email marketing as a channel and how we got from there to where we are today.

Early email marketing

The technology to send email messages emerged in the early 1970s, but only government and educational institutions really had access to it. In the mid-1980s, commercial networks began opening up the potential of this messaging channel to private citizens — mostly early adopters who loved technology for its own sake. Email as a common messaging medium, with practical applications for average citizens, didn't really take off until the 1990s.

At that time, major commercial networks, such as CompuServe and AOL, started connecting to the Internet and allowing messages to pass among competing systems. These messages were mostly text based and basic, as shown in Figure 1-1.

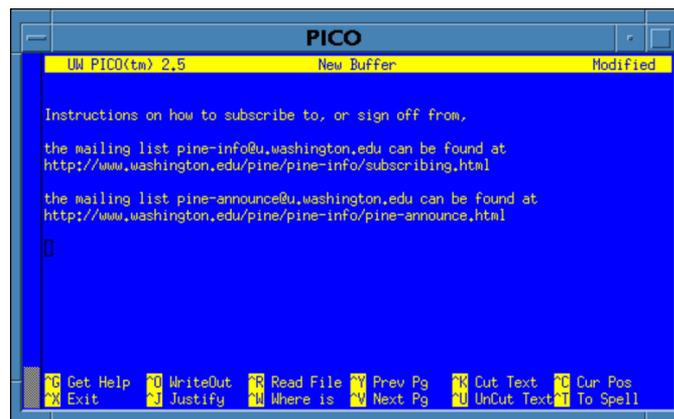


FIGURE 1-1:
Early email
was basic.

It's impossible to say who sent the first email that contained a marketing message or when they sent it, but it was probably pretty early. Even when the technology is unsophisticated and certainly not built with marketing purposes in mind, innovative marketers always find a way to use new tools to get an edge! Early email marketers borrowed strategies from direct mail to send electronic versions of what they would have sent to your mailbox.

Today, companies develop tools specifically for designing, automating, and delivering your email marketing, and marketing strategies and best practices exist that are specific to this channel. The tools that deliver these messages are available from companies called *email service providers* (ESPs). Salesforce Marketing Cloud is one such tool.

Email marketing is a highly effective method of delivering *one-to-one marketing messages* (messages to just one customer at a time, such as a thank-you message after an order) or *one-to-many marketing messages* (messages to an entire list of customers, such as a monthly newsletter). However, some marketers have misused email and given it a bad reputation. The term *spam* refers to unwanted marketing messages. Spam is the digital equivalent of all the junk mail you receive in your physical mailbox, but it causes even more irritation: In the early days of email, consumers oftentimes had to pay by the minute for their online time, and having to waste that time to read and delete unwanted messages made them angry.

The backlash grew further when mobile devices became popular for reading email. Again, consumers were paying a price for precious online time and sifting through unwanted messages felt expensive.

The great irony is that email marketing offers the power to provide highly customized messages that customers want to receive. The fact that email marketing developed a bad reputation for creating too many unwanted messages says more about the techniques used by marketers than the technology itself.

To combat this reputation — and to get more value out of email marketing efforts — online marketers began to develop best practices to ensure that subscribers could control their own email marketing experience and not develop so much resentment. For example, it's a best practice to offer a link in every email that a customer can click to unsubscribe from your email list.

As evidence of how important this particular best practice is, unsubscribe links are now required in marketing messages by law. Among other things, the Controlling the Assault of Non-Solicited Pornography and Marketing (CAN-SPAM) Act of 2003 requires that subscribers can opt-out of your email lists. Brands that ignore the wishes of their subscribers may find themselves in court.

From batch and blast to the highly personalized message

Email marketing's early bad reputation wasn't built by scammers — or at least not *only* by scammers. Since email marketing was a new medium, guidelines on how or what to send didn't exist, nor were there any experts or thought leaders to consult with. It was the Wild West, and online marketers just tried whatever idea occurred to them to see if it worked.

Because there were no email-marketing experts, companies commonly called on their direct-mail marketing experts to design their email-marketing campaigns. The result was a campaign methodology called *batch and blast*.

The concept is simple — you get as many email addresses as you can, however you can, and send them all the same message at the same time. The message you send is generic so that it will apply to everyone. If you put too much specialized information in a message, you risk damaging your relationship with message recipients who don't care about your specialized information.

Fortunately, for us modern-day online marketers, data has become more plentiful and tools can take advantage of that data to create personalized messages. For example, an early improvement was to add a subscriber's first name to a message. Figure 1-2 shows how this kind of personalization appears in an email in Salesforce Marketing Cloud.

Personalization is a relatively simple feature to implement in emails, but it's not remotely the limit of what you can do. By using the data you have about your subscribers, you can build different, personalized email content for each subscriber. This can include specialized content for the subscriber's particular interests, local weather conditions based on ZIP code, or a list of items the subscriber has ordered recently past, as shown in Figure 1-3.

Delivering this kind of highly customized email is no longer optional for most businesses: Customers have come to expect the brands that they engage with to understand and act on their preferences. Keep this in mind for your messaging efforts, so you can delight your customers.

From two channels to too many to count

For the longest time, online marketers had only two digital channels from which to choose: websites and email. The explosion of mobile devices and social media apps, however, has resulted in more channels than you can count — and the number keeps growing. Today's online marketer has many choices about how to communicate with subscribers.

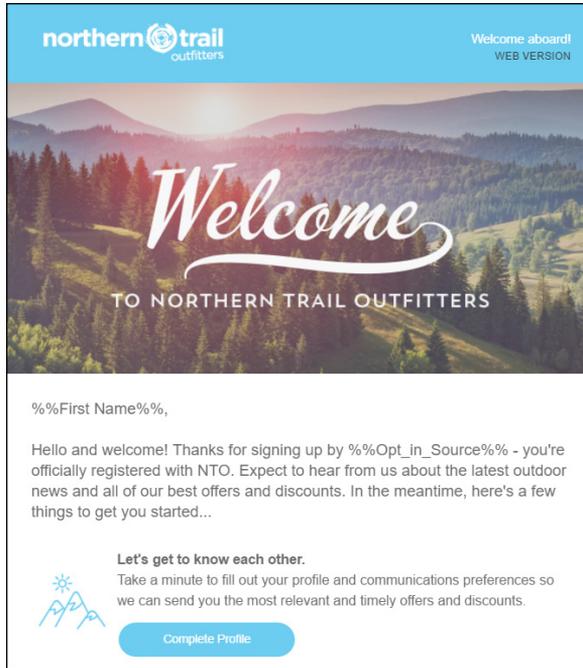


FIGURE 1-2:
An example
of email
personalization.



FIGURE 1-3:
A highly
customized email
example, based
on an online
order.

With each channel comes a different approach to marketing. After you decide that you're interested in promoting your brand through a particular channel, you may need to rethink your goal. For example, a normal goal is to lift sales, but on Instagram (a social networking app for sharing videos and photos), a better goal may be to reinforce your branding or to introduce a new product. Building awareness about your offering can be just as important as grabbing an immediate lift to sales.

Even with so many channels and all they can offer, email is still the core of your online marketing efforts. Email is the number-one channel for reaching your customers, educating them about your products, and developing a relationship with them.

From brand-centric to customer-centric

A major shift has been occurring in the marketing landscape over the last ten years. Although it has happened faster for some companies than others, everyone is waking up to this reality: Customers are now in control of your message.

You put a brand message out into the world, but you no longer have control over how it's consumed, what happens to it, and ultimately where it appears. The days of dictating one-way proclamations from on high are over.

Case studies abound of online marketing campaigns getting out of the brand's control:

- » Companies asking Twitter users to add a *hashtag* (a series of characters starting with # that makes it easier to search for related tweets) to the posts they share, only to find the hashtag appended to complaints about the brand
- » Companies encouraging customers to share photos of themselves using their products on Instagram, only to see countless photos of broken products
- » Customers creating parody Facebook pages dedicated to chronicling a company's poor customer service

This sea change can be terrifying to traditional marketers who learned to keep control of the message at all costs, but there is a bright side. The fact that customers want to tell you what they think means that they're engaged, and you can improve your offering to meet their changing demands. Embrace your customers, value their feedback, and demonstrate that you're listening, and they will reward you beyond your dreams.

The customer journey revolution

As online marketers understood the great level of control that customers have, they began to develop a new concept: the customer journey. A customer journey is a tool to craft a total customer experience with your brand.

For a long time, marketers treated the customer experience as a simple linear progression. Customers

- » Realize they need something
- » Possibly research what products are available to meet that need
- » Make a purchase, and the experience is over

Obviously, this was an oversimplification even then, but marketers truly did not care nearly as much about customers as they did about *prospective* customers.

In the digital age, though, marketers understand that a customer has an ongoing relationship with your brand that may not be linear. For example, some customer might need to engage with your customer support or warranty teams, and those interactions affect their perception of your brand.

Today's consumers have countless online platforms that they can use to influence others' opinion of your brand. You can't afford to neglect your customers, even after the purchase is complete. You need to craft customer journeys to keep your customers delighted throughout your entire relationship with them.

The Importance of the Customer Journey

Without customers, you have no business, but you can do better than just selling to faceless customers. The marketer's job is to design the interactions that keep customers delighted with your brand. As we discuss in this section, delighted customers lead to business success.

Marketers in today's businesses

Excepting executive administration, marketing is the one discipline that can touch every part of a business. Various kinds of marketers in your company might do any of the following things, and more:

- » Identify profitable markets to pursue with product offerings.
- » Interview prospects to understand what the market needs from products.
- » Set standards for the user experience of the product.

- » Craft the promotional messages that create the market's perception of the brand.
- » Create guidelines for how customer-facing teams, such as sales and customer support, talk about the product.
- » Identify opportunities to sell current clients additional products.

Being steeped in the market, the market's needs, and how the product fulfills those needs gives marketers a unique perspective on how to talk to prospects and customers. Marketers have a good understanding of how to target messages to particular populations to get them to take action.

In the modern business world, marketers have vast amounts of data available. Advances in technology have made it so that you can electronically store data about even very, very large groups of clients. You can pull data together from disparate sources, as well. You might already have a list of email addresses from your email newsletter sign-up sheet, for example, but you can cross-reference that list against the information in your point-of-sale (POS) system to bring other details about the customers together with those email addresses.

The downside of having so much information about customers is that customers now have an expectation that you will use that information to provide higher quality service. As a marketer, you need to be able to pivot quickly, and you might find yourself overwhelmed by all the options you have.

Decisive moments for customers

Marketing wisdom says that customers will make a purchase during specific points in time. The trick for you is to figure out those points in time and make sure that your brand is top-of-mind when they arrive.

Early in the prospects' research process is a great time to collect their contact information. For example, you can set up a form on your website where prospects enter their email address and other information to receive a white paper or discount offer. Sending that white paper or discount is the perfect opportunity to invite the prospect to begin receiving your free newsletter. Ongoing communications, such as newsletters or happy birthday messages, help you keep your brand fresh in the prospect's mind.

After the prospect makes a purchase and becomes a customer, your post-purchase offers can provide an opportunity to upsell. You can suggest purchasing an add-on product, a warranty, or an enhanced service plan. Even if you have

nothing else to sell, you can get valuable information by soliciting feedback from your purchasers that you can use as customer testimonials or to improve your internal processes.

Grow the top line

Whereas the *bottom line* is the profit (or loss) that your business experiences after you account for all expenses, the *top line* is the total revenue. A business can become more profitable by growing the top line or by reducing the expenses that you have to subtract from it. Generally, marketers focus on the top line.

To grow the top line, you need customers making purchases. Getting new customers is expensive because you're starting from square one with people who might never have even heard of your brand. Before you can hope for new customers to make a purchase, you need to educate them about the following:

- » The problem your product solves
- » Why your product solves that problem better than the competition
- » What your company stands for

Your existing customers, however, already know most of these things, which is why it's much cheaper to retain existing customers than to get new ones.

One way that you can retain existing customers is to show that you know them and care about their preferences by tailoring products or offers to them. You need to leverage data to deliver tailored messages, and make the customer experience seamless across all channels and throughout the sales process.

Another way to retain existing customers is to get them talking. You want to create content that encourages them to engage with you. Engagement can take many forms, including things such as the following:

- » Clicking links in emails
- » Responding to surveys
- » Downloading information from your website
- » Making purchases
- » Reviewing products
- » Sharing your information on social networks

Data-based insights

The data you collect as you engage your customers and prospective customers can be as valuable as strictly making a sale. You can leverage the data that you collect from your digital campaigns to do the following:

- » **Understand your audience.** As you communicate different kinds of messages over different channels, you'll see what gets the best response from your audience and results in the best top-line growth.
- » **Create personas.** *Personas* are composite characters that marketers create based on information about the actual client base. A persona is a profile of a typical client, complete with demographic information, hobbies, and even a stock photo. Marketers share the personas with other teams in the company to help everyone empathize with the client base as they make decisions.
- » **Test content.** You may have heard of the *wisdom of the crowd*, or the idea that the aggregate opinion of a large group of people is better than the opinion of any individual member of the group. By engaging your customer base, you can compare the performance of, say, two photographs, and see which one drives more engagement. The wisdom-of-the-crowd idea says that you'll get a more accurate idea of which photo is better this way than by asking individuals in a focus group.
- » **Test product or service mixes and offerings.** Similarly, engaging a wide variety of customers and prospective customers opens up the opportunity to see what mix of products gets the best response, while at the same time making your customer base feel recognized.

Operating in real-time

Real-time operations means different things to different people. In general, we expect *real time* to mean actions that occur as soon as the required data becomes available. Even that simple definition can encompass a broad range of activities.

For example, on the simple end, using API code to trigger sending a welcoming email message as soon as a new subscriber joins your list is a kind of real-time activity. Alternately, an example of a complex real-time operation might be to use a feed of data from your online shopping cart to send a series of targeted emails to subscribers who put items in the cart but never finished the purchase.

To operate in true real-time mode, the data that triggers the activities is critical. You have to plan for it to be reliable, secure, and tightly integrated with your marketing system so that the activities begin immediately after you receive the data.

Depending on the nature of your real-time messaging, you may also need to consider business rules to control the totality of your messaging to each subscriber.