Link Your Salesforce Data using Marketing Cloud Connect

OVERVIEW

Unify and analyze your data in one place with Marketing Cloud Connect. In this 4-day class, you'll learn how to link your Marketing, Sales, and Service Clouds to seamlessly engage with your customers. Discover how to segment Salesforce data to create personalized, targeted emails. Track and report on those emails to see what resonates most with your customers so you can strengthen your relationships with them.

DURATION
• 4 days

DELIVERY FORMAT
• Classroom

WHO SHOULD TAKE THIS COURSE?

This course is ideal for email digital marketers responsible for managing the email channel for their organization, Salesforce Admins responsible for supporting users when Marketing Cloud Connect is installed, and customers who will be connecting their Salesforce org to Marketing Cloud using Marketing Cloud Connect.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

• EExplain Marketing Cloud Connect.
• Connect a Marketing Cloud account to a Salesforce org.
• Create individualized content blocks to leverage Salesforce CRM data using personalization strings and dynamic content.
• Create an email in Content Builder.
• Utilize the various sending methods to send to a Lead, Contact, Report, or Campaign in Marketing Cloud and Sales and Service Clouds.
• Automate sending emails using a Triggered Email, Automation Studio, and Journey Builder.
• Configure Synchronized CRM Sources to bring CRM data into Marketing Cloud.
• Segment data using Reports, Filter Activity, and Query Activity.
• Create journeys using Salesforce Activities in Journey Builder.
• Review tracking data in Marketing Cloud and Sales and Service Clouds.
• Create analytics reports in Marketing Cloud.
• Create and customize Marketing Cloud reports in Sales and Service Clouds.
• Create a dashboard based on Marketing Cloud reports.

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MODULES & TOPICS

Salesforce Marketing Cloud Overview
- Review the Customer Success Platform
- Get to Know Marketing CloudCloud

Marketing Cloud Connect
- Review Marketing Cloud Connect
- Review of various ways to connect the Clouds

Marketing Cloud Connect Configuration
- Explore How to Connect the Clouds
- Review the Prerequisites for Marketing Cloud Connect
- Review Salesforce Terminology
- Connect a Marketing Cloud Account to a Salesforce Org
- Review prework

Personalized Digital Marketing
- Review What Functionality Can Be Accomplished in Each Cloud
- Create a Personalized Email Leveraging Salesforce CRM Data Using Content Builder
- Use Testing Tools
- Send a Marketing Cloud Email Manually to a Lead, Contact, Report, and Campaign
- Automate the Sending of an Email via a Triggered Email, Automation Studio, and Journey Builder
- Understand What Happens When an Email Is Sent
- Understand Subscriber Statuses

Synchronized CRM Data
- Explain How and Why to Bring Salesforce CRM Data into Marketing Cloud
- Synchronize Data Sources in Contact Builder
- Create Segments Using Filters and the Query Activity
- Create a Salesforce Data Extension for Sending
- Create a Journey Using Synchronized Data Sources
- Test a Journey

Journey Builder
- EExplain Sales and Service Cloud Activities
- Create a Journey Using Sales and Service Cloud Activities Tracking and Reporting
- Understand the Tracking Data Available in Marketing Cloud
- Create and Automate Tracking Reports in Marketing Cloud
- Understand the Tracking Data Available in Sales and Service Cloud
- Create and Customize Marketing Cloud Reports in Sales and Service Cloud
- Create a Dashboard for Marketing Cloud Tracking Reports

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