MARKETING CLOUD CONNECT ESSENTIALS

MODULE S & TOPIC S

Salesforce Marketing Cloud Overview
- Overview of the Customer Success Platform
- Overview of the Marketing Cloud

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

Connecting the Clouds
- Review of steps to connect the Clouds
- Review of the pre-requisites for Marketing Cloud Connect
- Review of Salesforce terminology
- Connect a Marketing Cloud account to a Salesforce org
- Review of pre-work

Personalized Digital Maketing
- Review of what functionality can be accomplished in each cloud
- Create a personalized email leveraging Salesforce CRM data using Content Builder
- How to use Testing Tools
- How to manually send a Marketing Cloud Email to a Lead/ Contact, Report, and Campaign
- How to 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 the Marketing Cloud
- How to synchronized data sources in Contact Builder
- How to create segments using Filters and the Query Activity
- How to create a Salesforce Data Extension for sending
- How to create a journey using synchronized data sources
- How to test a journey

Journey Builder
- Explain each of the Sales and Service Cloud Activites
- How to create a journey using Sales and Service Cloud Activities

Tracking and Reporting
- Understand the tracking data available in the Marketing Cloud
- How to create and automate tracking reports in the Marketing Cloud
- Understand the tracking data available in the Sales / Service Cloud
- How to create and customize Marketing Cloud reports in the Sales / Service Cloud
- How to create a dashboard for Marketing Cloud tracking reports