Getting Started: Marketing Cloud: Content Builder

Accelerator Webinar

Presenter Name, Title of Presenter email@salesforce.com. @twitterhandle

This webinar will begin at 1:05 pm EDT

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Don't forget to request
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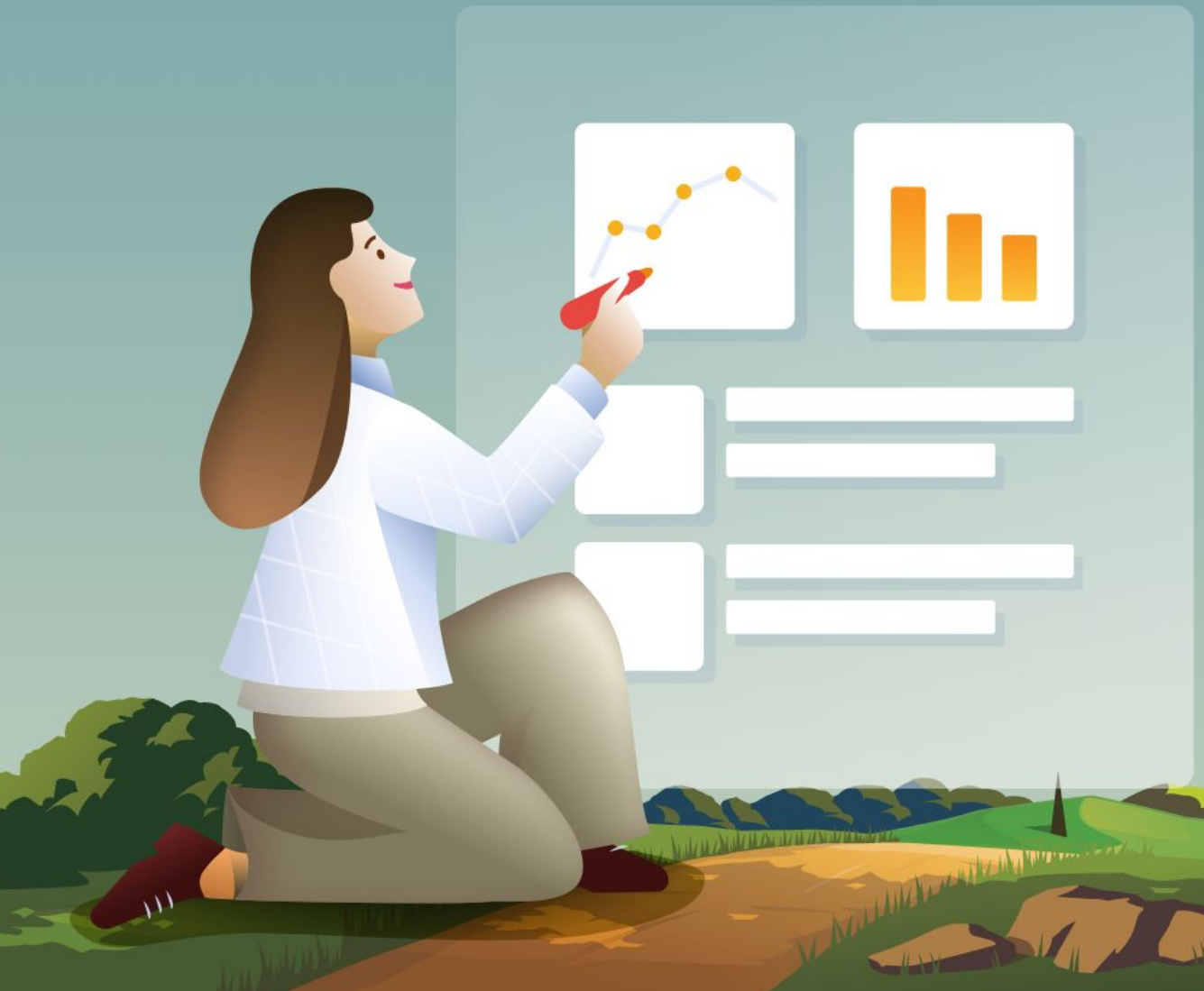
follow-up in the survey
after this call.

Welcome to this Accelerator Webinar!



In this two hour session, we'll discuss Content Builder basics and give you guidance to get started using Content Builder today, so you can get the most out of your Salesforce investment.

salesforce

Thank You for Being a Salesforce Customer

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Agenda

Today's Accelerator Webinar

Overview

What challenge are we solving for?

Content Builder Features

Let's look at a business challenge you want to solve with Content Builder.

Live Demo

See many of the features discussed in a live demonstration.

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Content Builder Administrative Considerations

Review the administrative options to consider in Content Builder.

Moving from Classic Content to Content Builder

Review the administrative options to consider in Content Builder.

Recommendations and Next Steps

Review a few recommendations and resources for next steps.

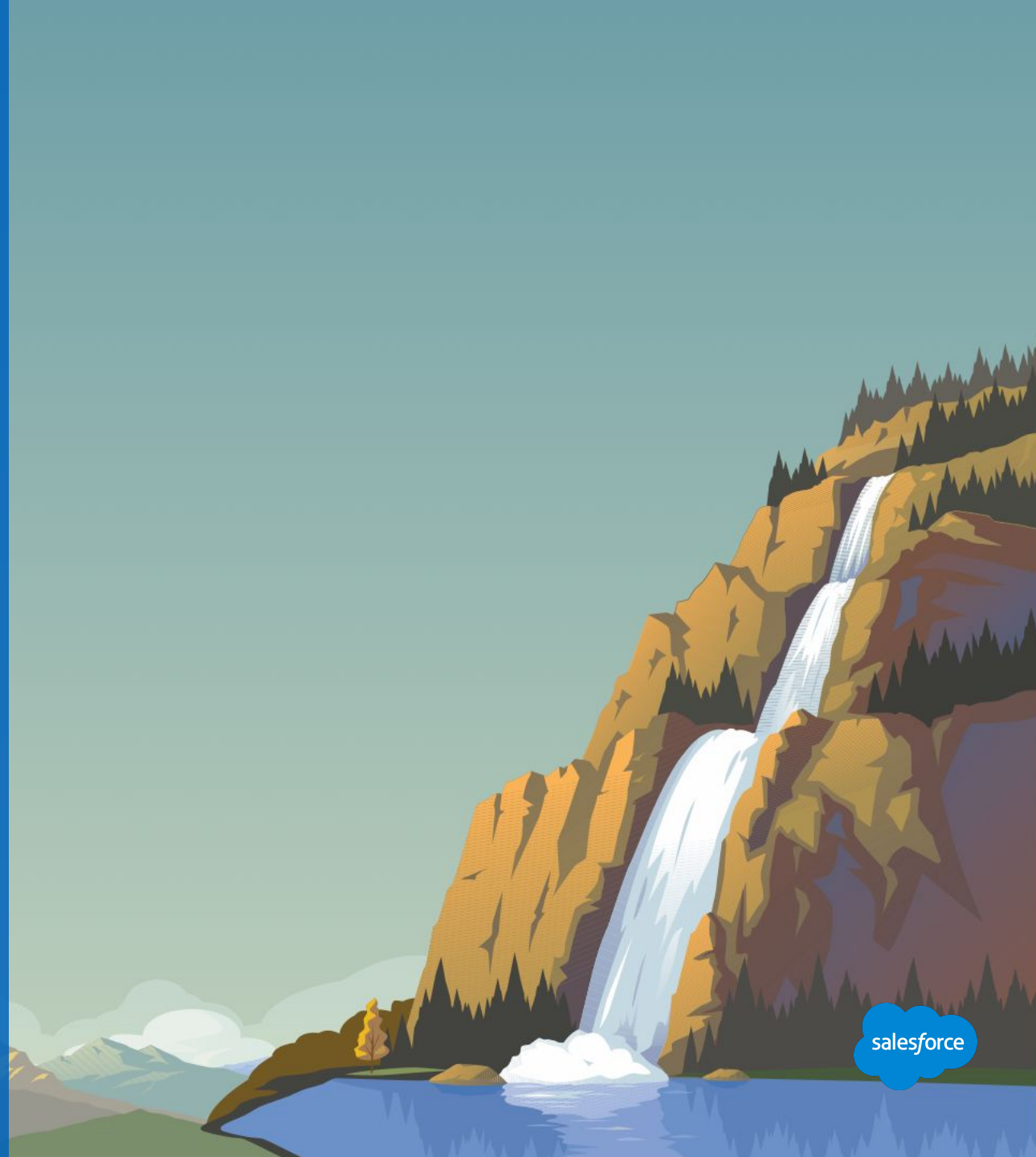
To help us gauge our participants on today's call, please answer this poll question

Poll Question

How many of you on the call today are already using Content Builder?

1. Yes, I am Using Content Builder.
2. Yes, but I'm Using both Classic Content tools and Content Builder.
3. No, I am still Using Classic Content tools only.
4. I'm not Sure.

Achieving Your Business Outcomes with Accelerators



Overview

What challenge are we solving for you?

A Salesforce Specialist will help you:

- Reduce marketer content publishing time with an understanding of all the components available to you in Content Builder.
- Improve marketing content curation with best practices to manage your content.
- Increase collaboration across teams using permissions, sharing, and approvals.

Content Builder Features

Overview of Content Builder Features

Discover the scope of this Accelerator

Content Builder Overview

Content Types

Images, blocks, templates, and emails

Content Management

Uploading, organizing, and sharing content

Content Blocks

Reusable drag-and-drop content

Templates and Content Areas

Out-of-the-box responsive layouts

Content Editor

Create emails with drag-and-drop interface

Creating Emails

Streamlined creation workflow

Preview and Testing

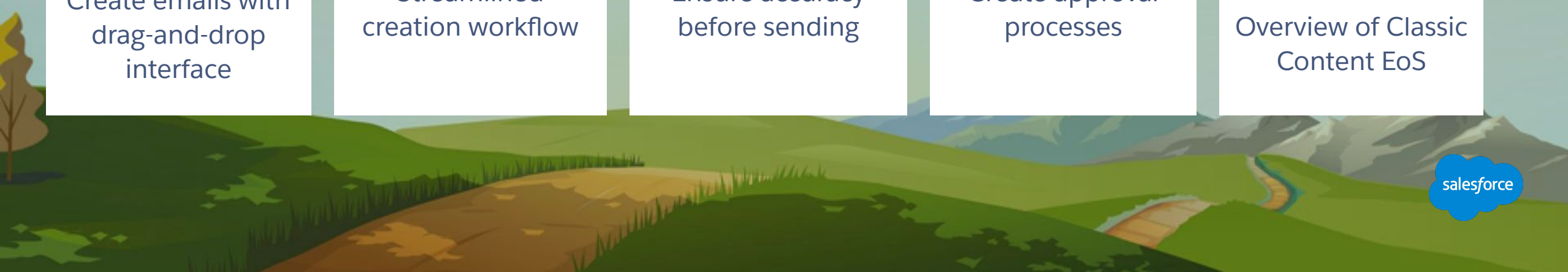
Ensure accuracy before sending

Approvals

Create approval processes

Moving from Classic to Content Builder

Overview of Classic Content EoS



Content Builder

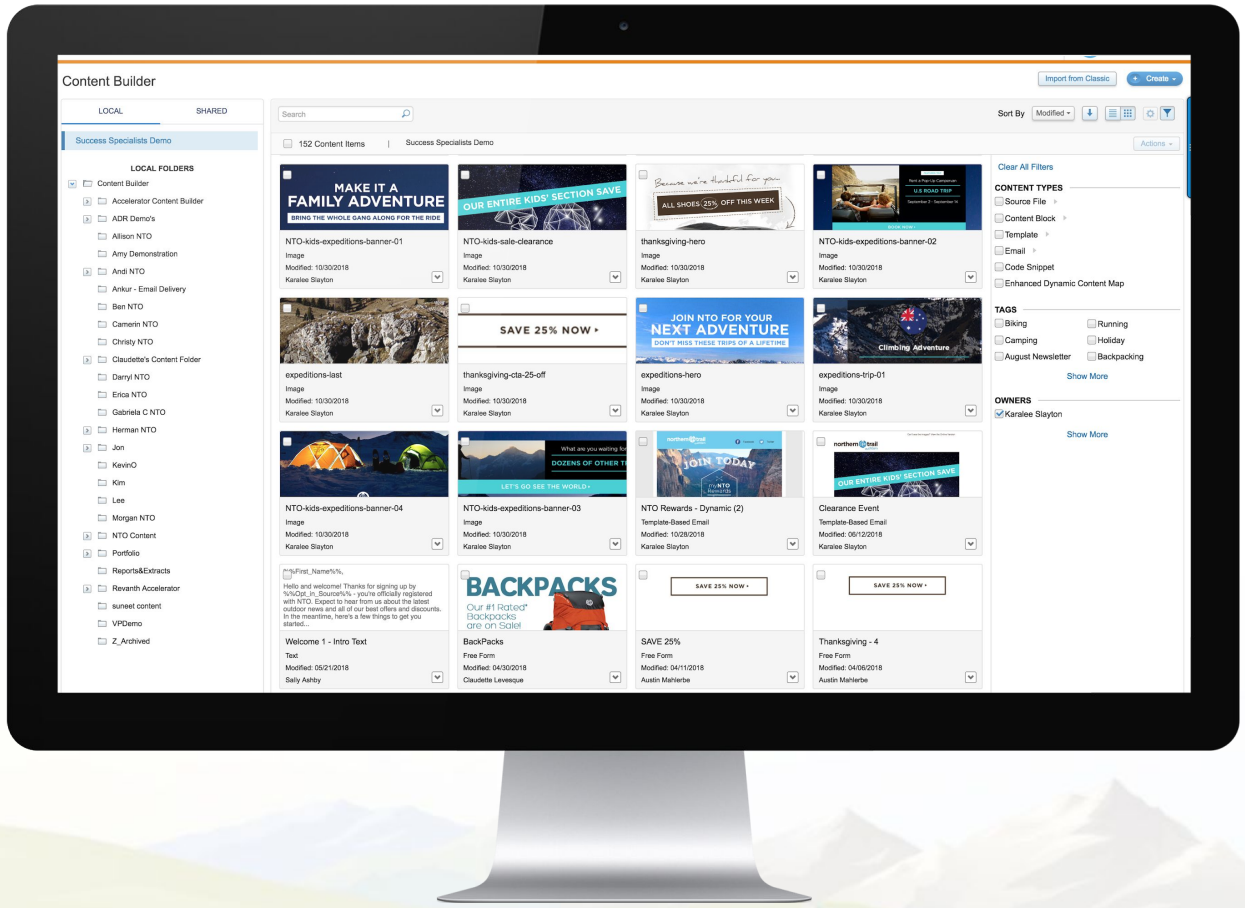
One place to store, search, edit and personalize content

Consolidate images, content blocks, templates and emails in a single location.

Visualize your content in a thumbnail view. Manage search and sort all of your content with filters and tags.

Store and share pre approved assets and templates to quickly build engaging emails.

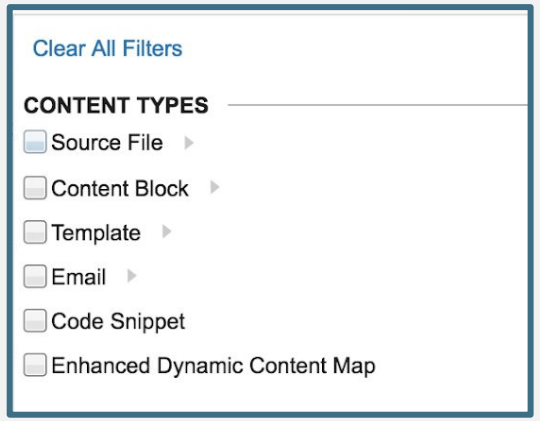
Seamlessly integrate content across channels (currently Email Studio and Web Studio, with other channels planned).



Content types

Content to use and reuse across the platform

Files	Content Blocks	Templates	Emails
Images	Button	Default templates	Template-based email
Text	Free form	Paste HTML templates	HTML email
Tables	HTML	Layout templates	Text-only email
Code	Image		
Document*	Text		
Video*	A/B test		
Audio*	Dynamic content		
	External content		
* Less than 3MB	Predictive content		
	Reference content		
	Social follow & share		



Uploading Content

Create or upload content from anywhere

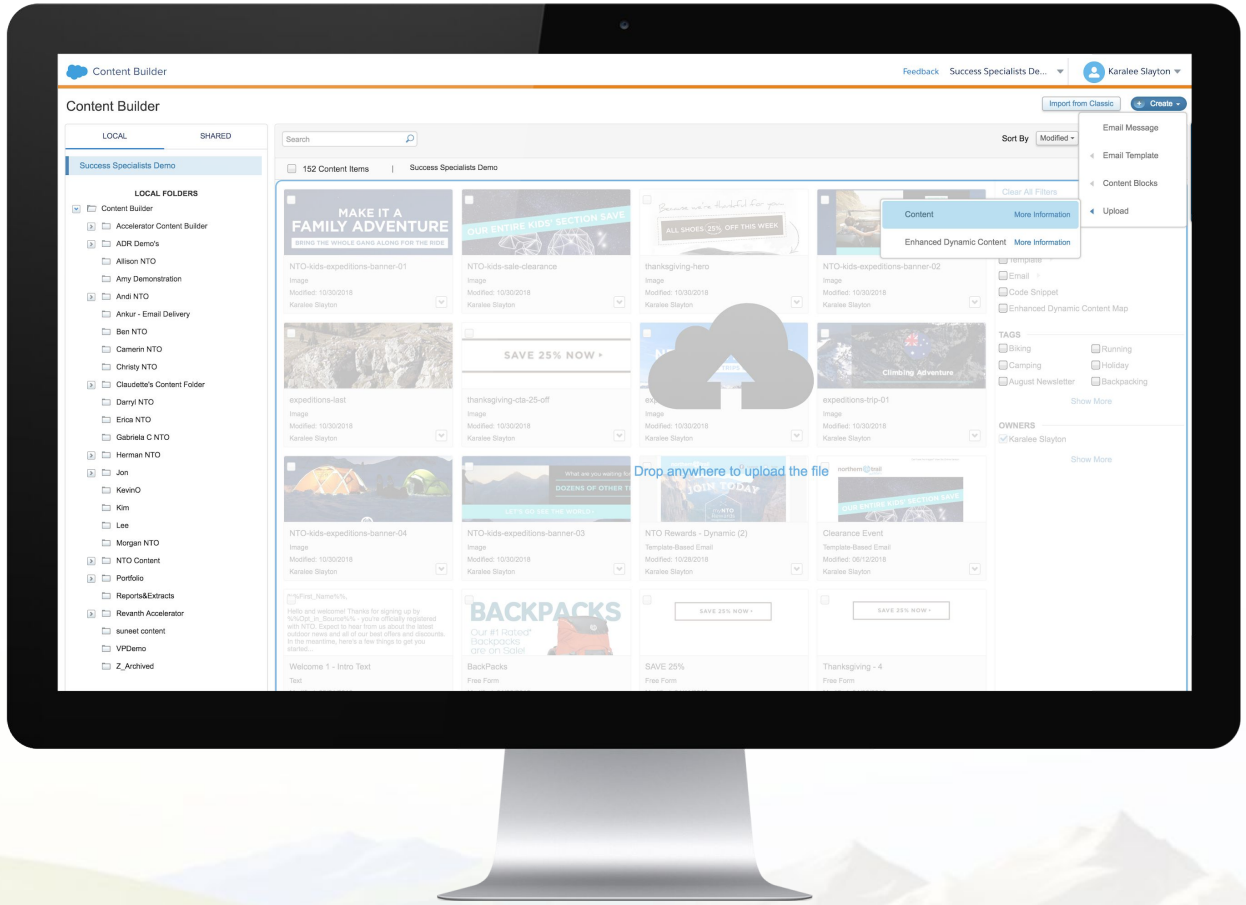
Drag and drop items straight from your desktop.

New content will be created in the selected folder.

Browse and upload from your document files.

Easily import content located in the Classic Content tools into Content Builder.

Drag and drop directly into an email during creation.



[Learn how to “Add & Import Content”]

For Classic Customers

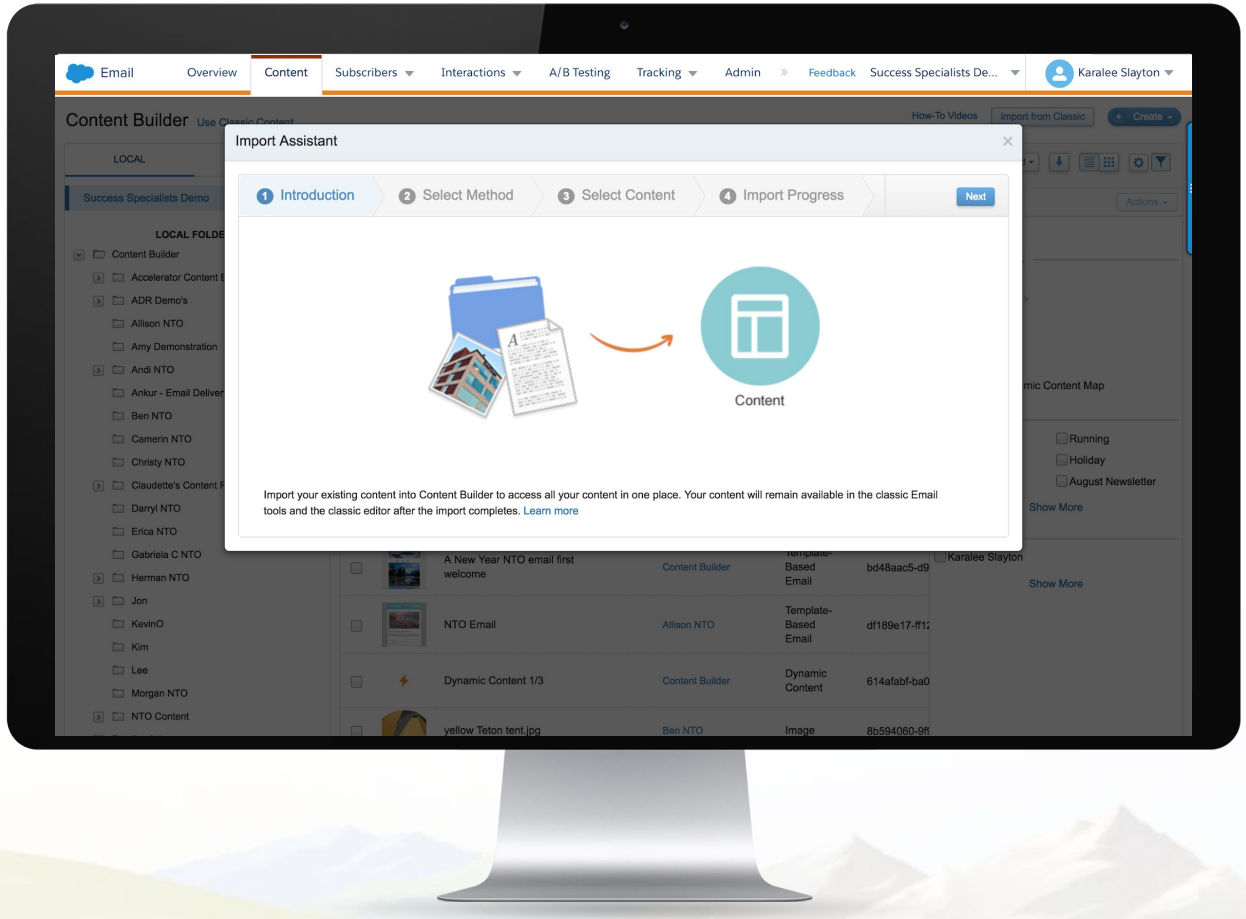
Leverage Existing Content

Import Assistant

Easily import content as needed from your Classic content:

- Portfolio
- My content
- My templates
- Shared folders

Create emails from existing Classic emails to quickly start using the new email creation tools and editor.



Organizing Your Content

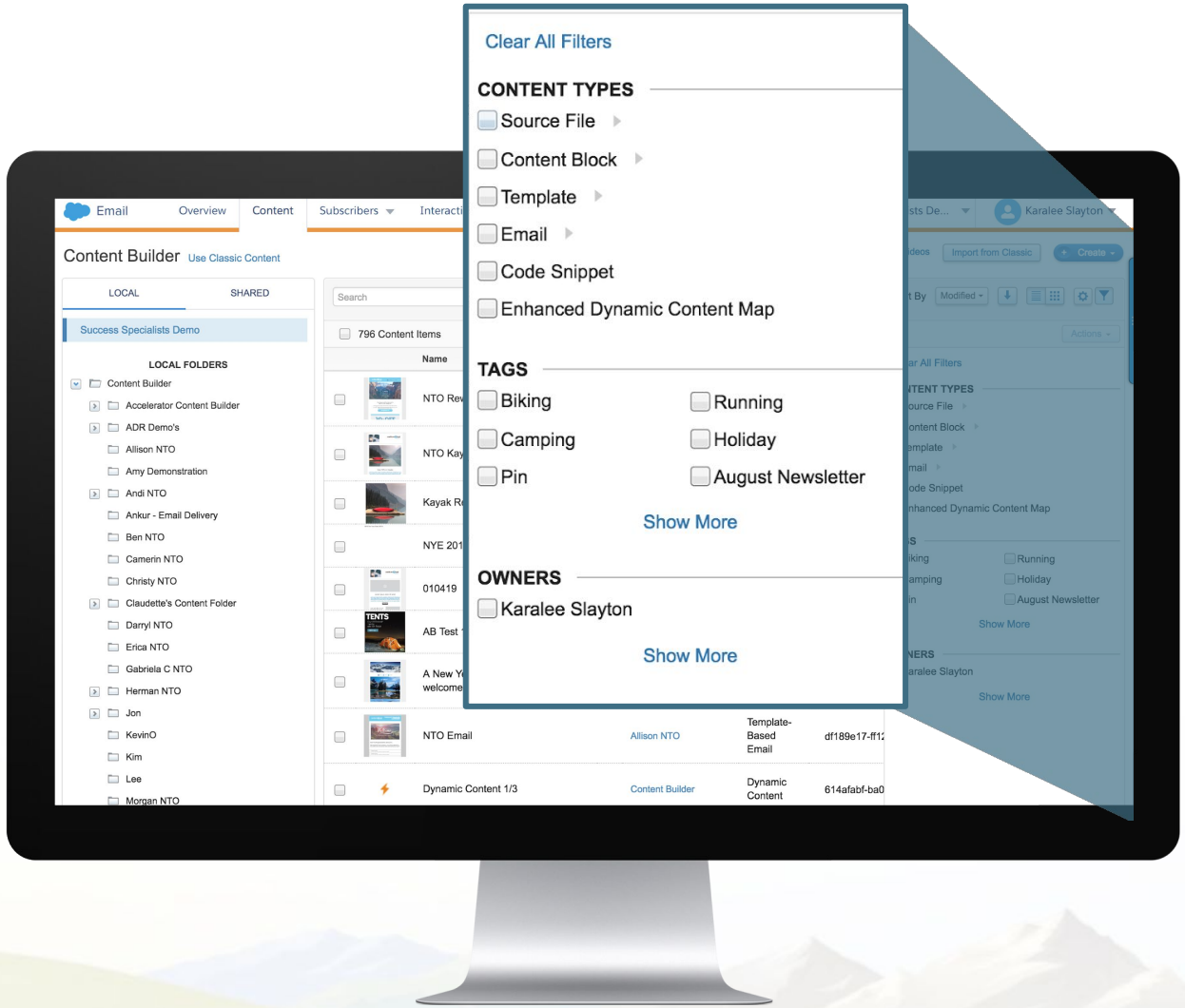
Find your content quickly and easily

Content Builder features that will help you organize your content:

- Unified folder structure
- Powerful search engine
- Global search and tagging

Search across all content, including images, emails, and templates

- Advanced sorting options
- Filter by content types, tags, or owner
- Group and individual content actions
- Right click to easily edit, delete, move, and more



[Learn how to “Organize Your Content”]

Sharing Content

Collaborate across business units

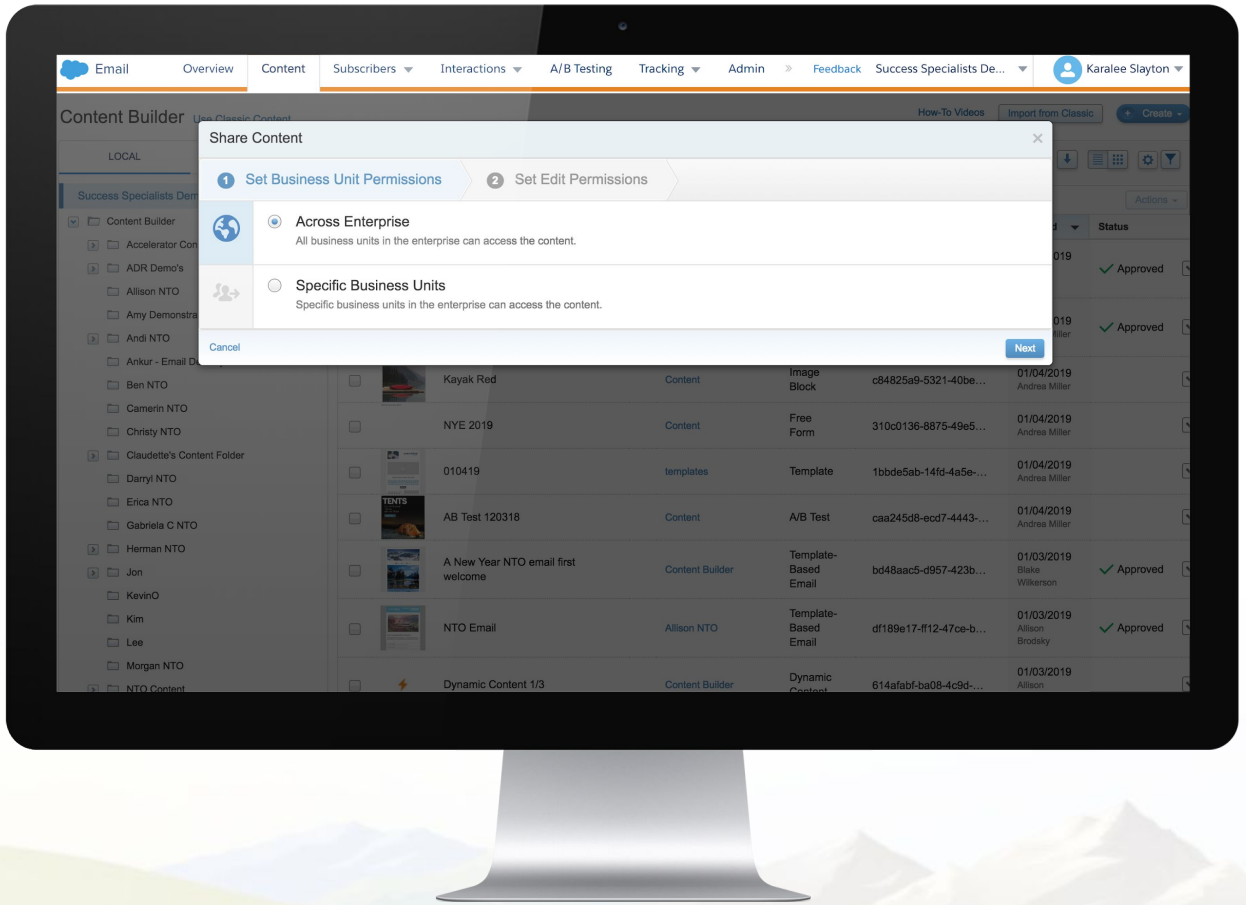
Allow users to share content and folders to one or more business units across your enterprise:

- Organize shared folder structures for the enterprise.
- Grant edit permissions based on file type.
- Gain visibility into which business units have access.

View and send: You cannot edit the shared content, but you can include it in a message.

Edit locally: Create a local edit from this shared email, which can then be edited. (available for emails only).

Edit globally: Edit the originally shared content. Any edits made by a recipient business unit will overwrite the content for all other business units.



Learn more about Sharing Content

Content Editor

Intuitive drag-and-drop interface

A unified email creation experience to create, edit, and test emails in one simple workflow.

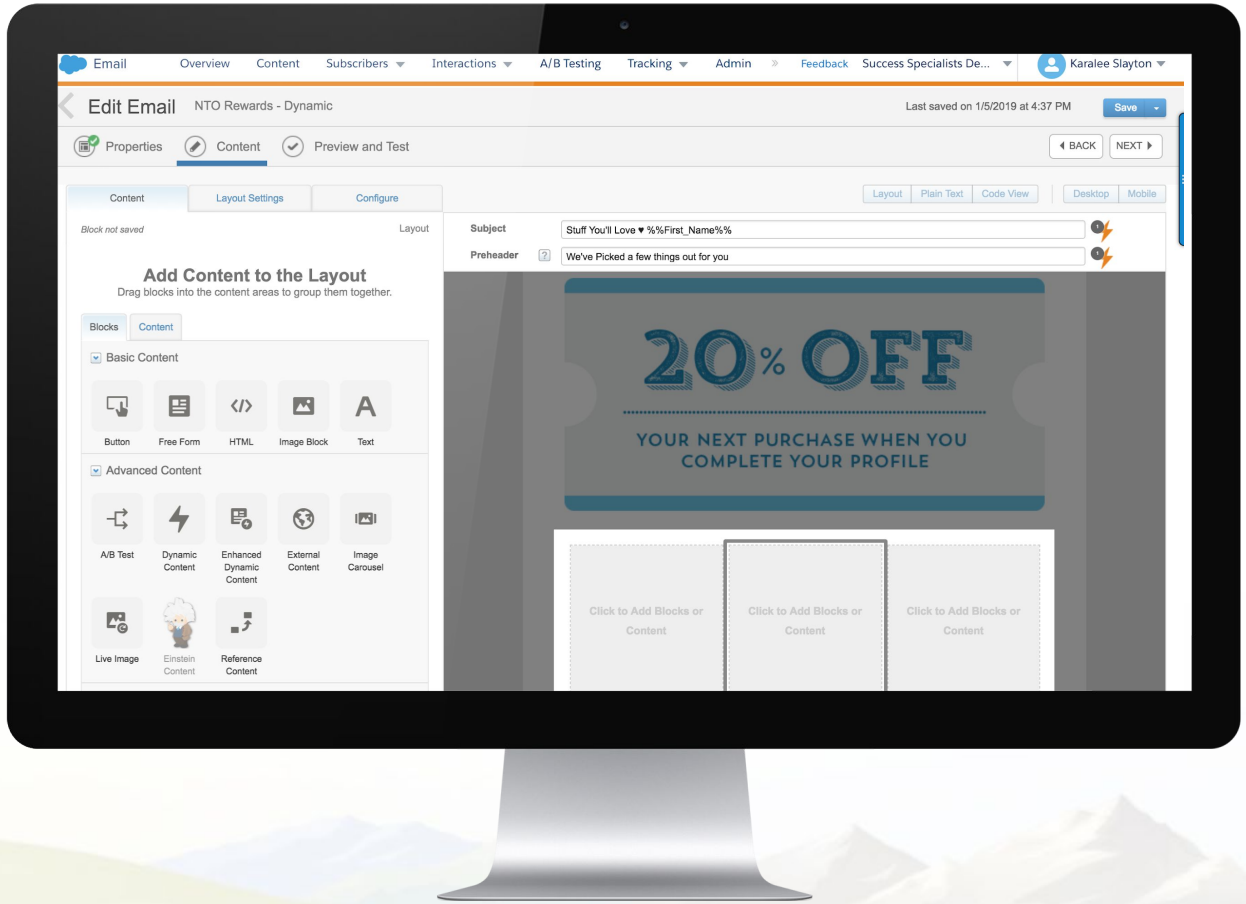
Build and preview emails and templates in real time with an always-present preview.

Create professional emails without knowing HTML.

Easily create content with WYSIWYG editing by using blocks and layouts.

Stack multiple blocks, layouts, and custom content in a defined content areas.

Insert references to common links such as Social Sharing, Forward to a Friend, and Open Tracking.

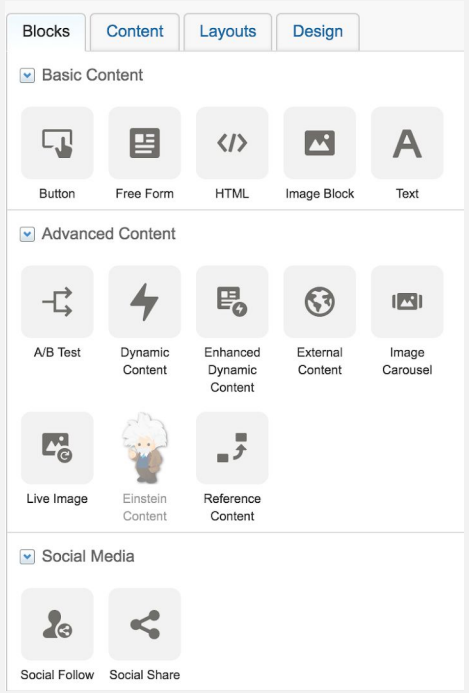


Learn more about how to Create an Email in Content Builder

Reusable Drag-and-Drop Content Blocks

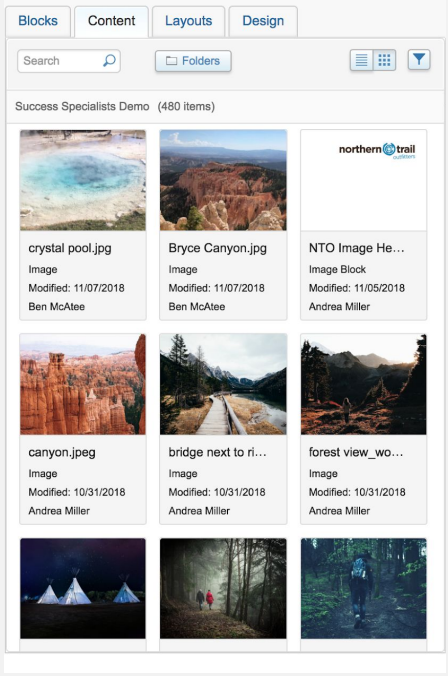
Blocks

Baseline content creation tools



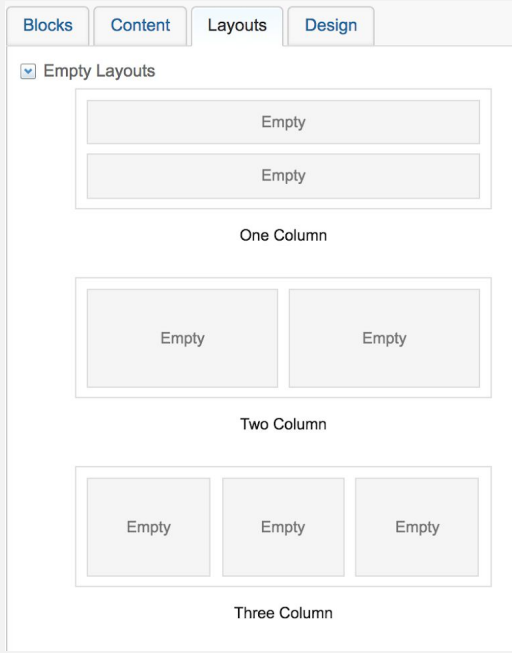
Content

Any content you want to reuse



Layouts

Advanced responsive content layout areas



Design

Set and lock template-level styling

SKIP THIS SLIDE - PLACEHOLDER - DELETE BEFORE MAKING THE FINAL PDF FOR CUSTOMERS

Consider Jumping right into Live Demo here...

Harbor Cruise Content Builder Canvas and Tools

Create and organize content:

- Review content types and each content block.

Create templates:

- Show how to create, edit, and save templates.
- Code view: HTML Paste & Code Snippets.
- Integrate blocks, layouts, and locking content.

Create emails:

- Drag, drop, and edit blocks, layouts, and content.
- Demonstrate building an email or use dynamic content to show the art of the possible.

If you have time, include preview, testing, approvals, and admin needs.

Content Blocks: Basic Content

Easily build and modify content

You can create reusable content to easily drag and drop into layouts. You can also reuse content across campaigns. Other features include:

Add block styling: This can include border, colors, and spacing.

Button: Easily create standard buttons with button text and a URL to link.

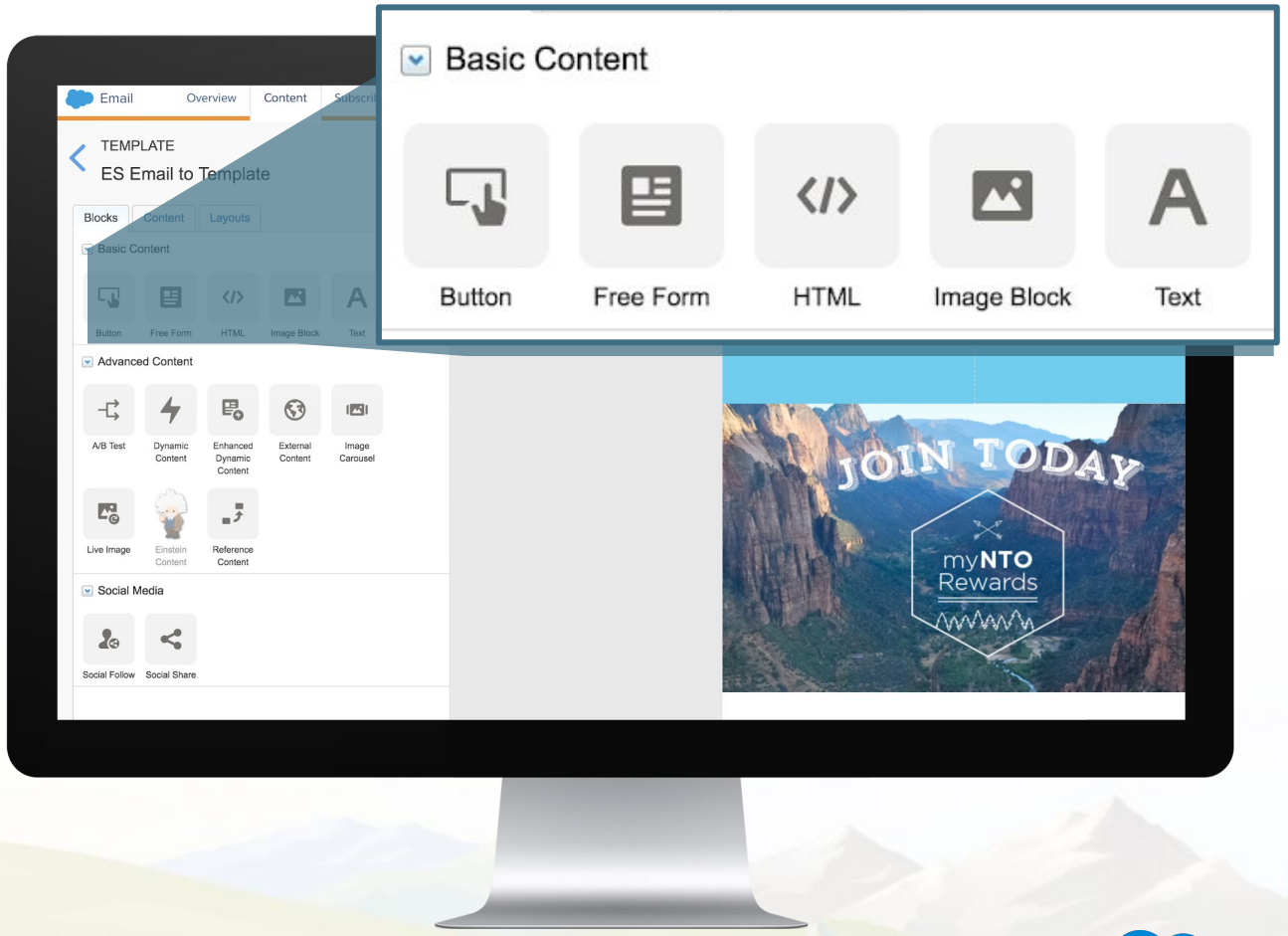
Free form: Add text, tables, links, and more.

HTML: Edit or modify HTML directly in a block to add indentation or spacing code snippets – this is accessible through a drop-down menu.

Image: Use existing images, drag and drop, or browse to select images from your computer.

Text: Type content to reuse.

Learn how to “Create Content Blocks”



Content Blocks: Advanced Content and Social Media

Drive customers to your ever-changing content

A/B Testing: Create content blocks for testing, and track which perform better across emails.

Dynamic content: Include content based on data in a data extension.

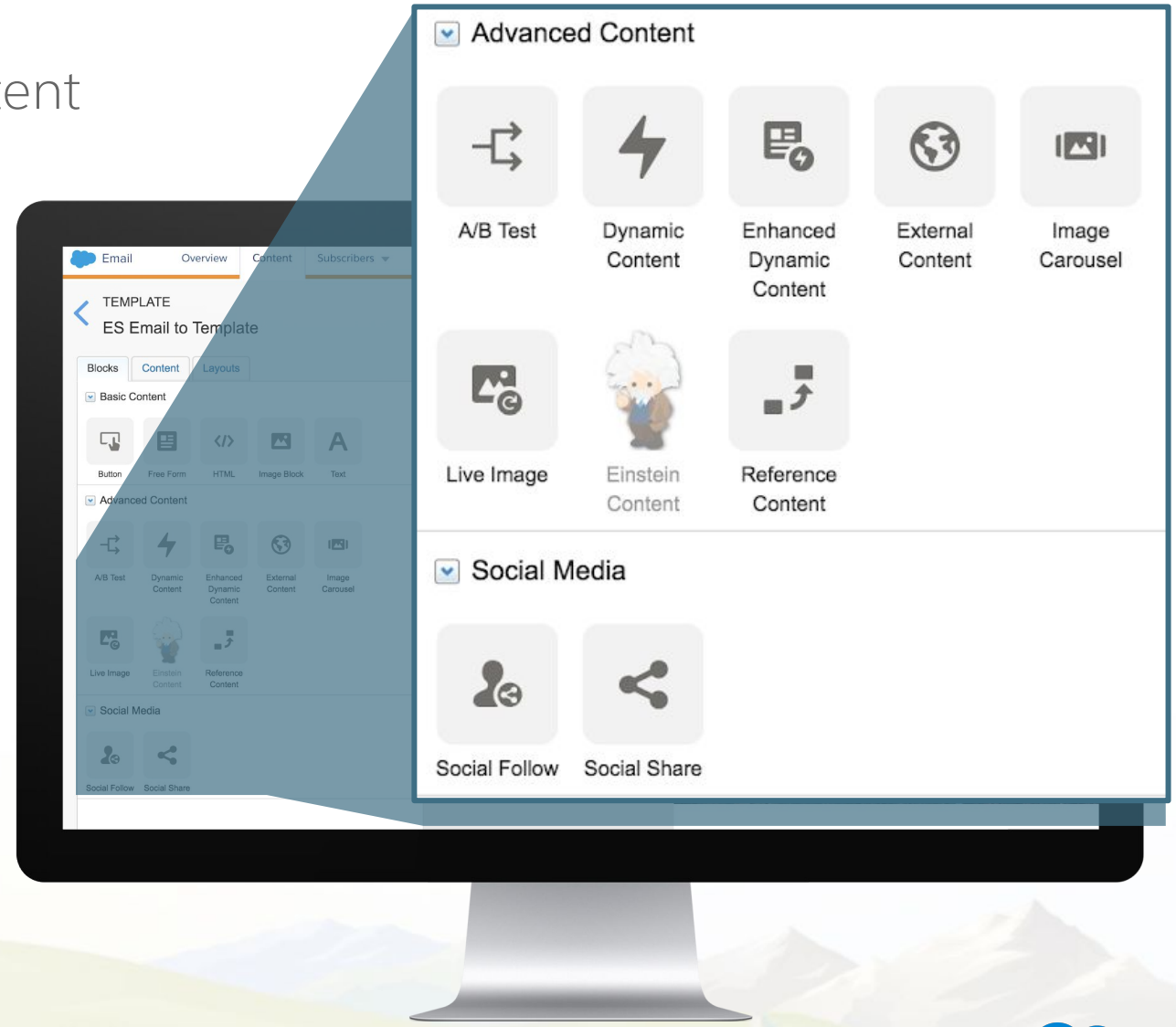
External content: Embed external content into a message using a URL.

Predictive content: Select personalized content based on subscriber attributes, behaviors, and rules.

Reference block: Allow users to insert a “pointer” to an existing content block in a template or email.

Note: This previously required AMPscript.

Social Media: Social Follow and Social Share allow recipients to share an email on their preferred social network.

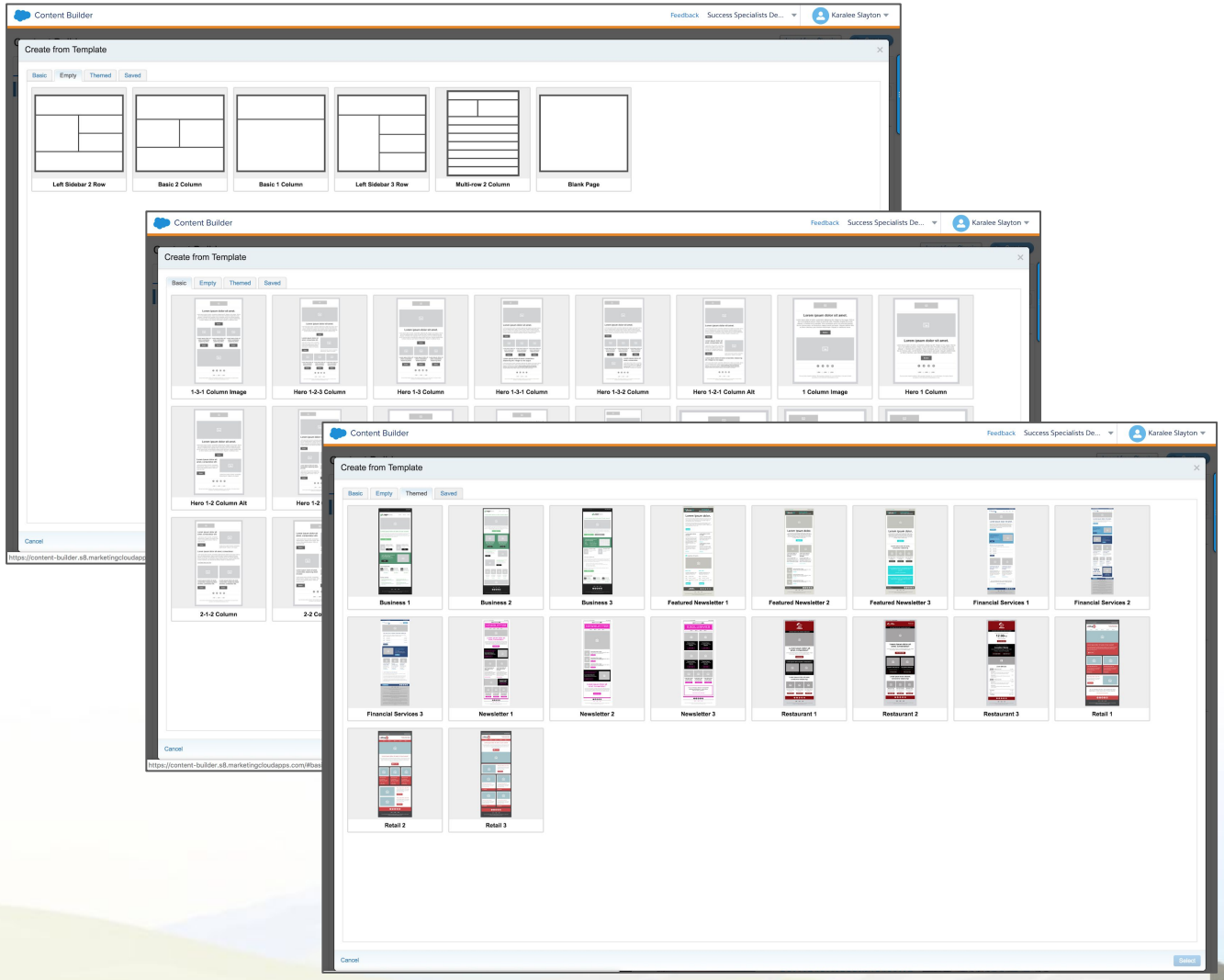


Template Options

Out-of-the-box responsive templates

Three types of default templates, that look great on mobile devices are available:

- Six empty templates: Based on the most commonly used Classic content templates.
- 20 basic templates: Editable blocks and layouts for content structure.
- 18 themed templates: Styled and editable blocks and layouts for content structure.
- Or create templates from your existing emails.



See how to “Create a Template”

Content Layout

Empty or predefined content areas

Change layouts on the fly by simply dragging and dropping a layout group of blocks onto the canvas.

Add layout styling just like content blocks,including border, colors, and spacing.

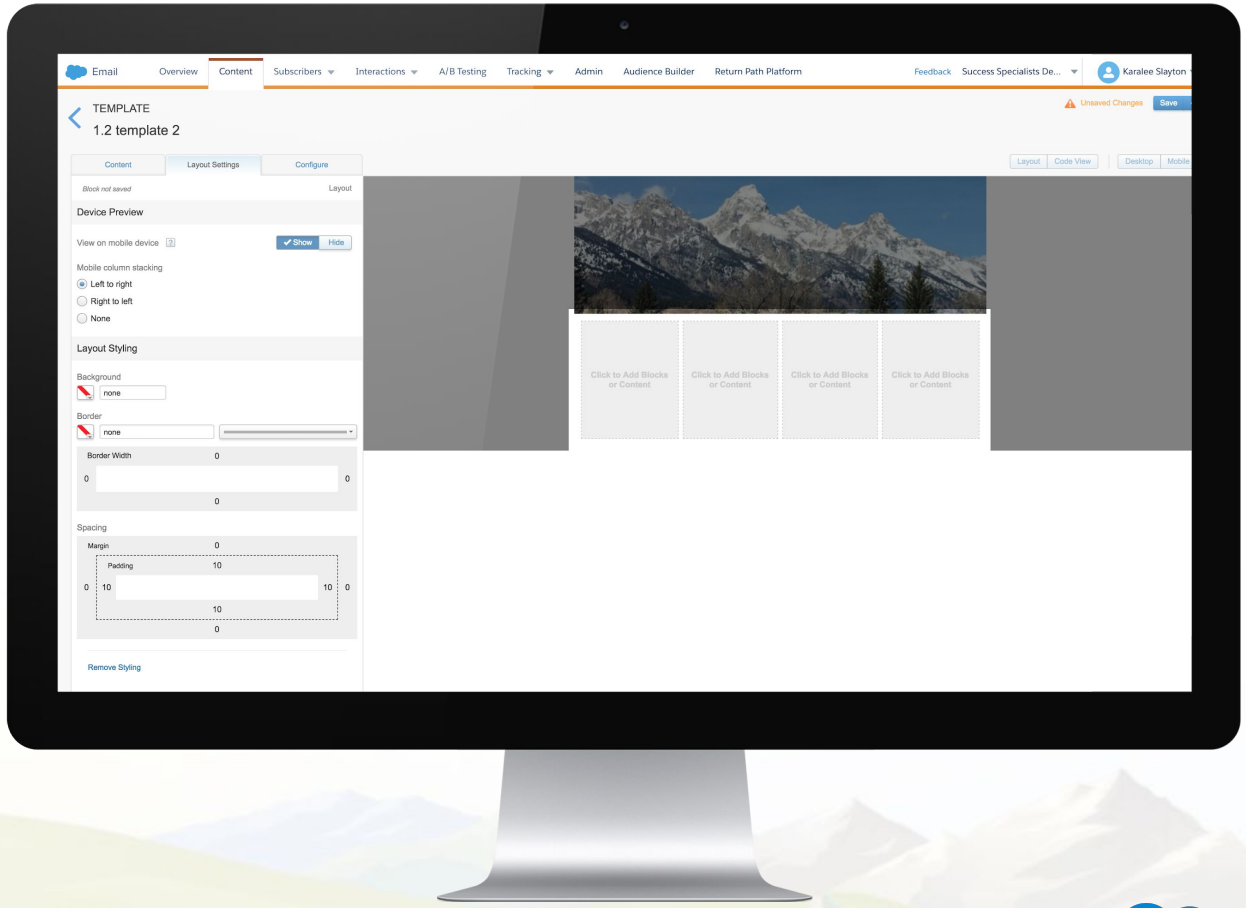
Configure or adjust the predefined layout for your specific needs.

Limit the number of blocks a user can drop into a content area.

Add any content or restrict the type of content allowed in a content area.

Edit default instruction labels to content areas.

Lock a content area to prevent editing.



Dynamic Content

Drag and drop dynamic content creation

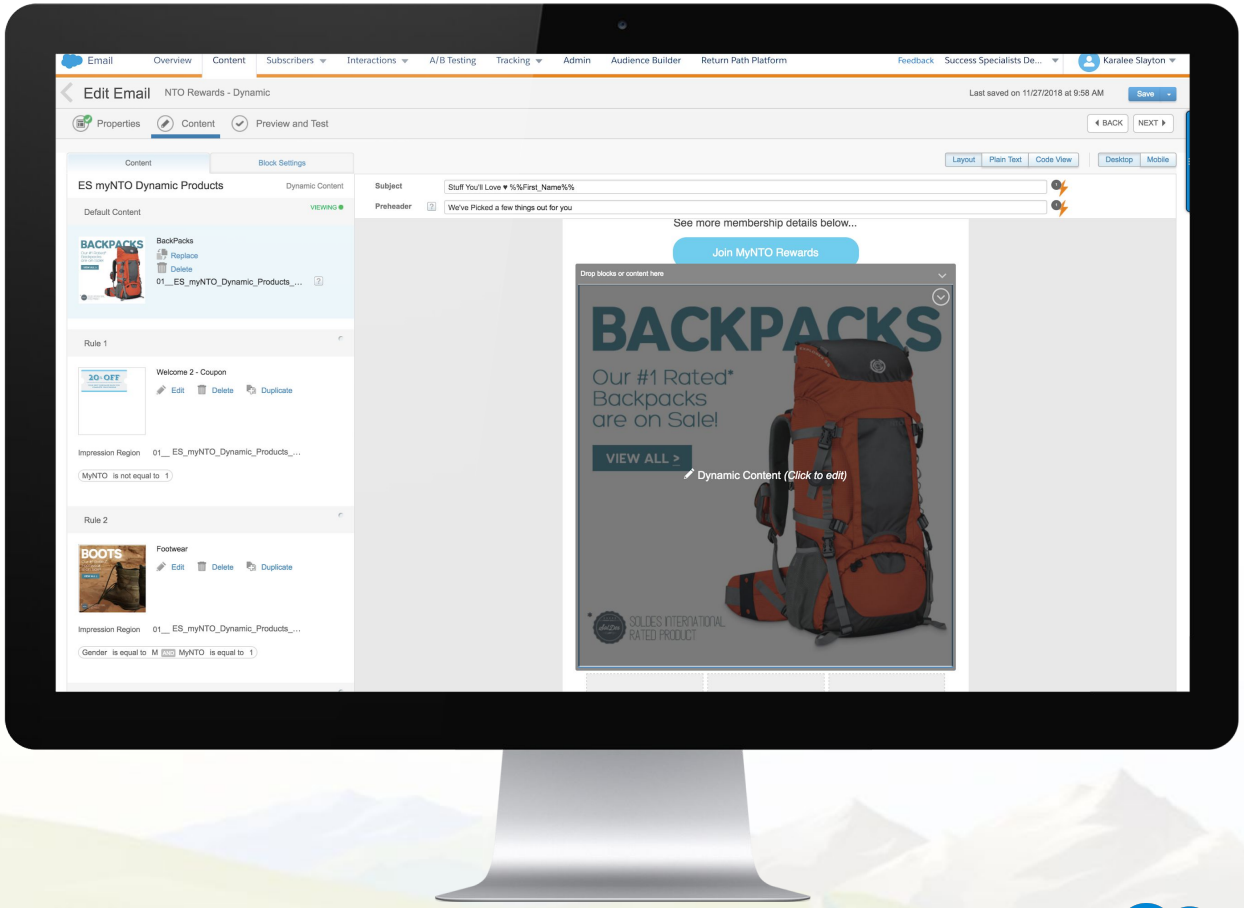
Content based on segmented data.

Create rules by dragging and dropping attributes.

Design multiple, personalized versions of the same send.

Automated campaigns based on individuals.

18x
Relevant emails drive 18 times the revenue compared to broadcast emails



Enhanced Dynamic Content

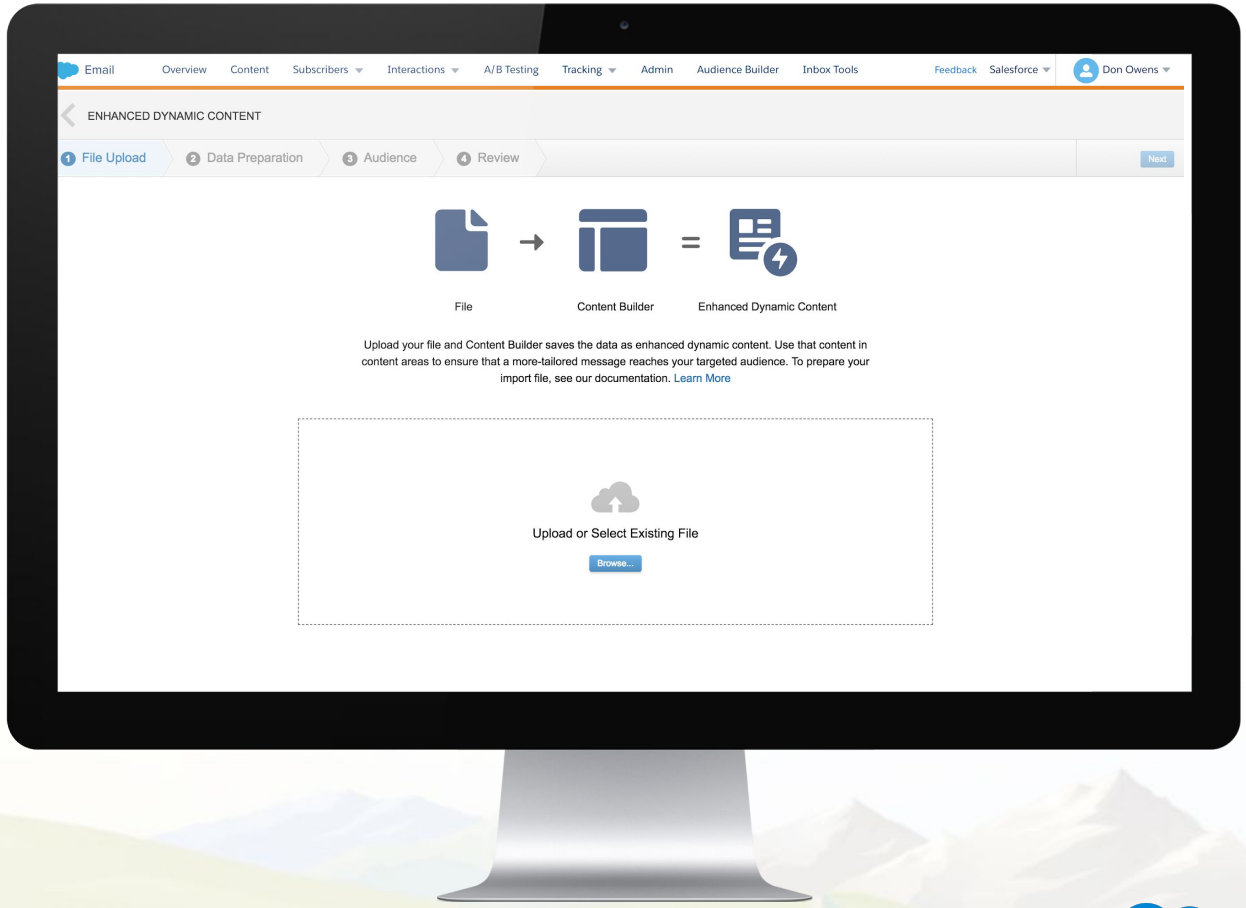
Import a delimited file containing text and image URLs

Upload a delimited file with multiple variations (rows) of multiple content items (columns).

The import will automatically create new assets for each column of data in the file.

Drag each asset into an email to automatically create a new dynamic content block.

Search for and edit the base assets created during the import directly in the UI.



View Enhanced Dynamic Content video

Code Snippets

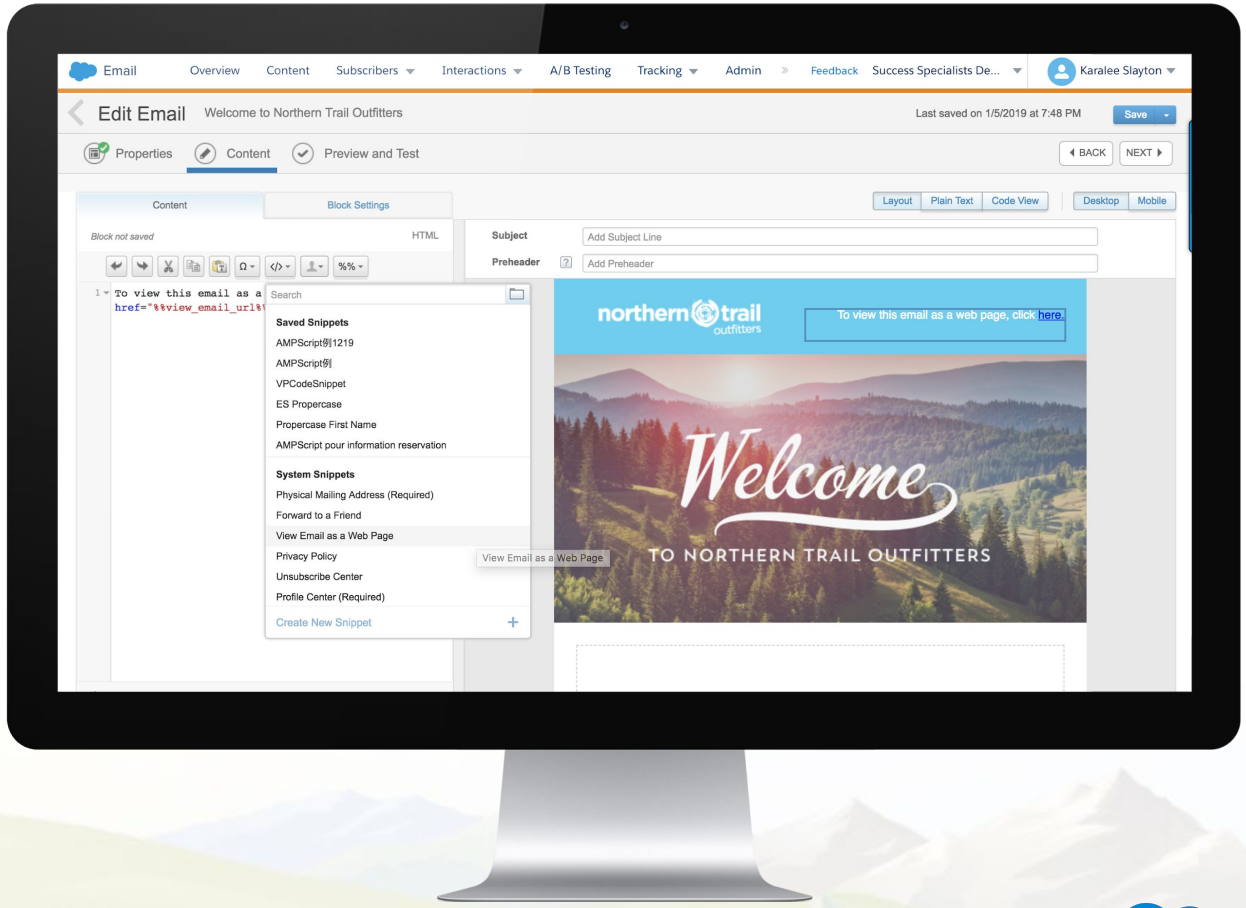
Reusable bits of HTML, AMPscript, and Guide Template Language

Now you don’t have to know code to use code when creating your email content.

Create and save reusable bits of code to use with “hot keys.”

Easily insert these snippets when editing HTML through the code snippets toolbar selector, or by typing the customer key value for the snippet followed by the tab key.

You can also reference code snippets with AMPscript.



Learn more about ”How to Create a Code Snippet”

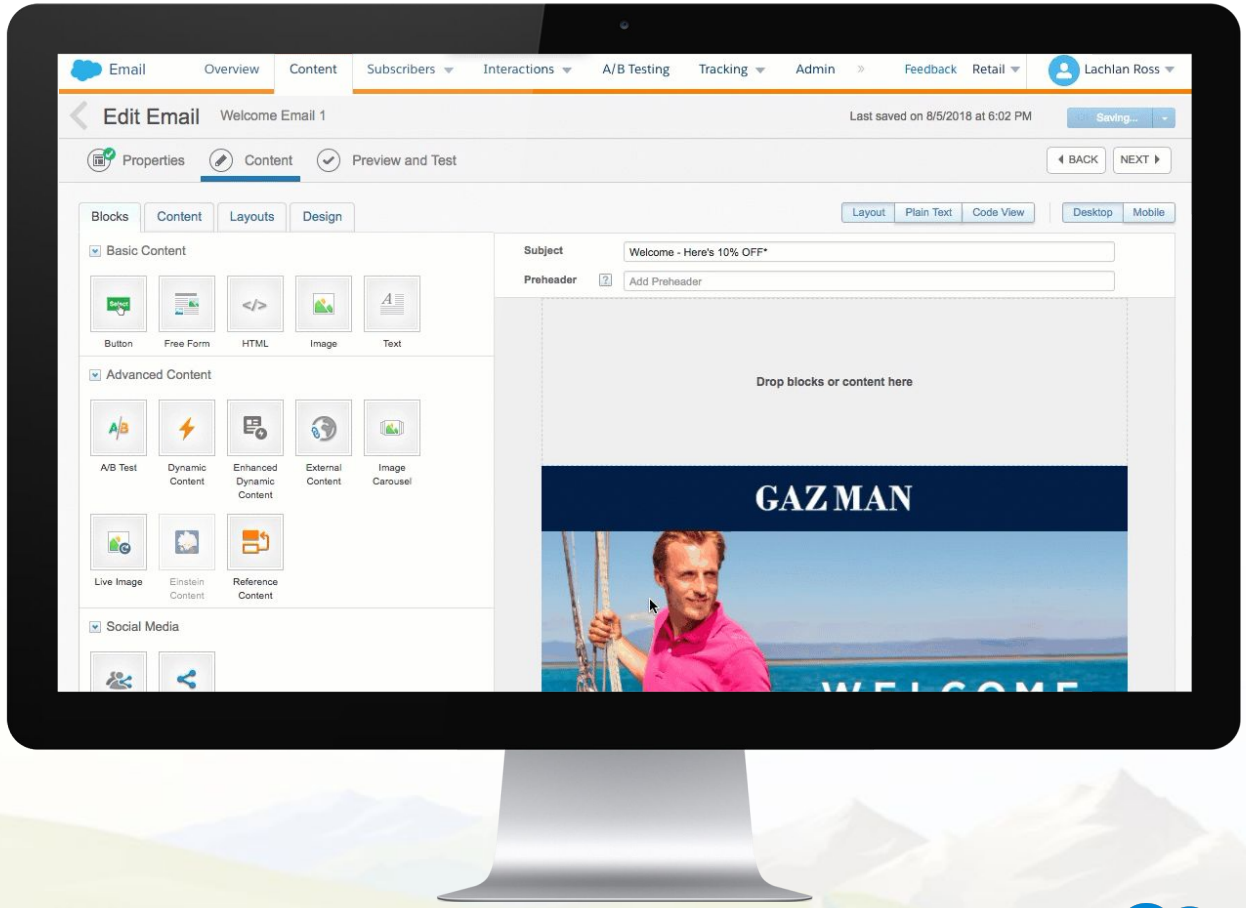
Content Block SDK

Extending Marketing Cloud Content Builder

Steamline Campaign Production
Develop custom block widgets with the Content SDK and easily add to emails using drag and drop editor.

Enhance Your Email Content
Real-time weather forecast, Google Maps, and LiveVideo (Liveclicker), just to name a few.

Salesforce AppExchange
Partners are building content blocks with Content Block SDK for customers that can be easily implemented in Content Builder.



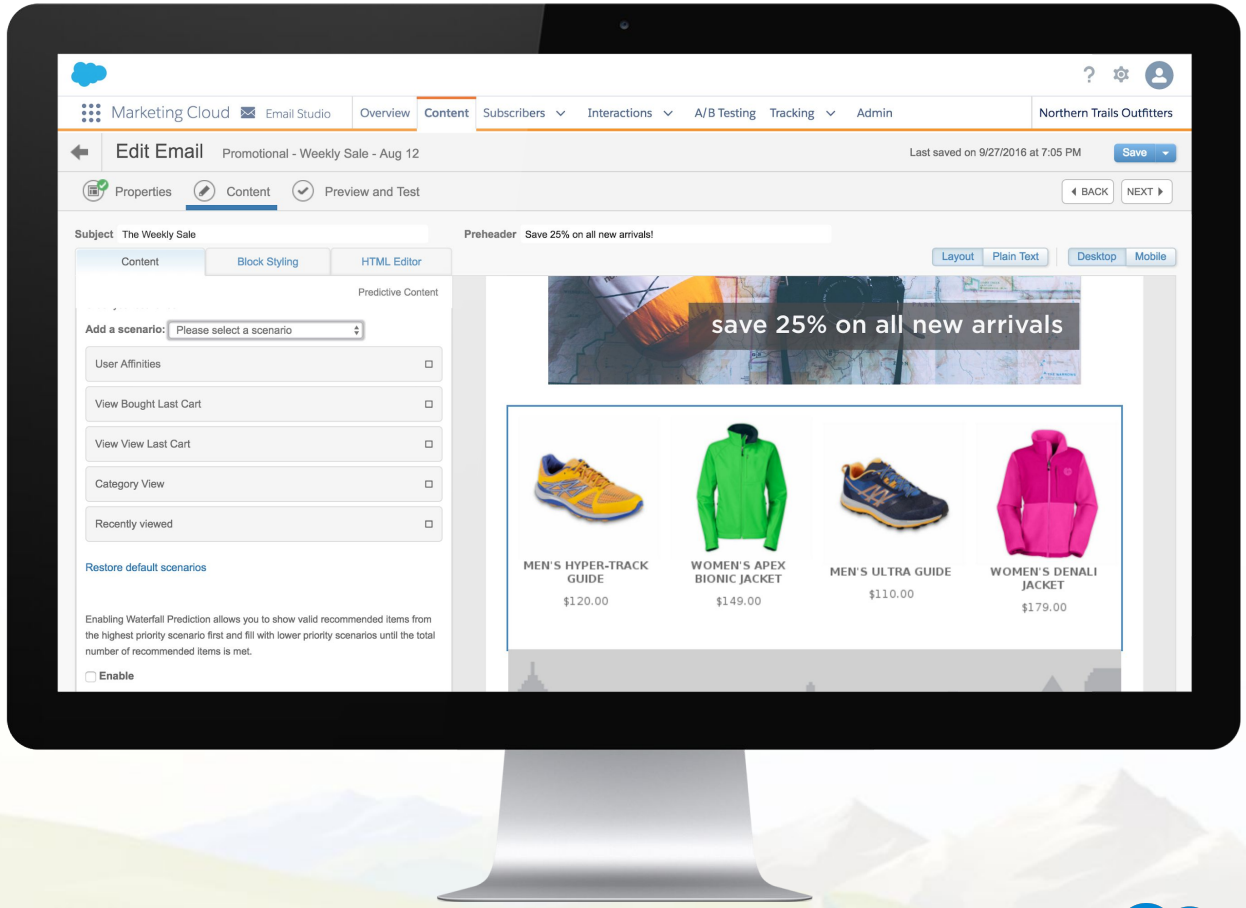
Predictive Content

Anticipate Your Customers' Needs with Einstein

Drag and drop predictive content creation.

Streaming catalog and web data.

Pre-built predictive algorithms.



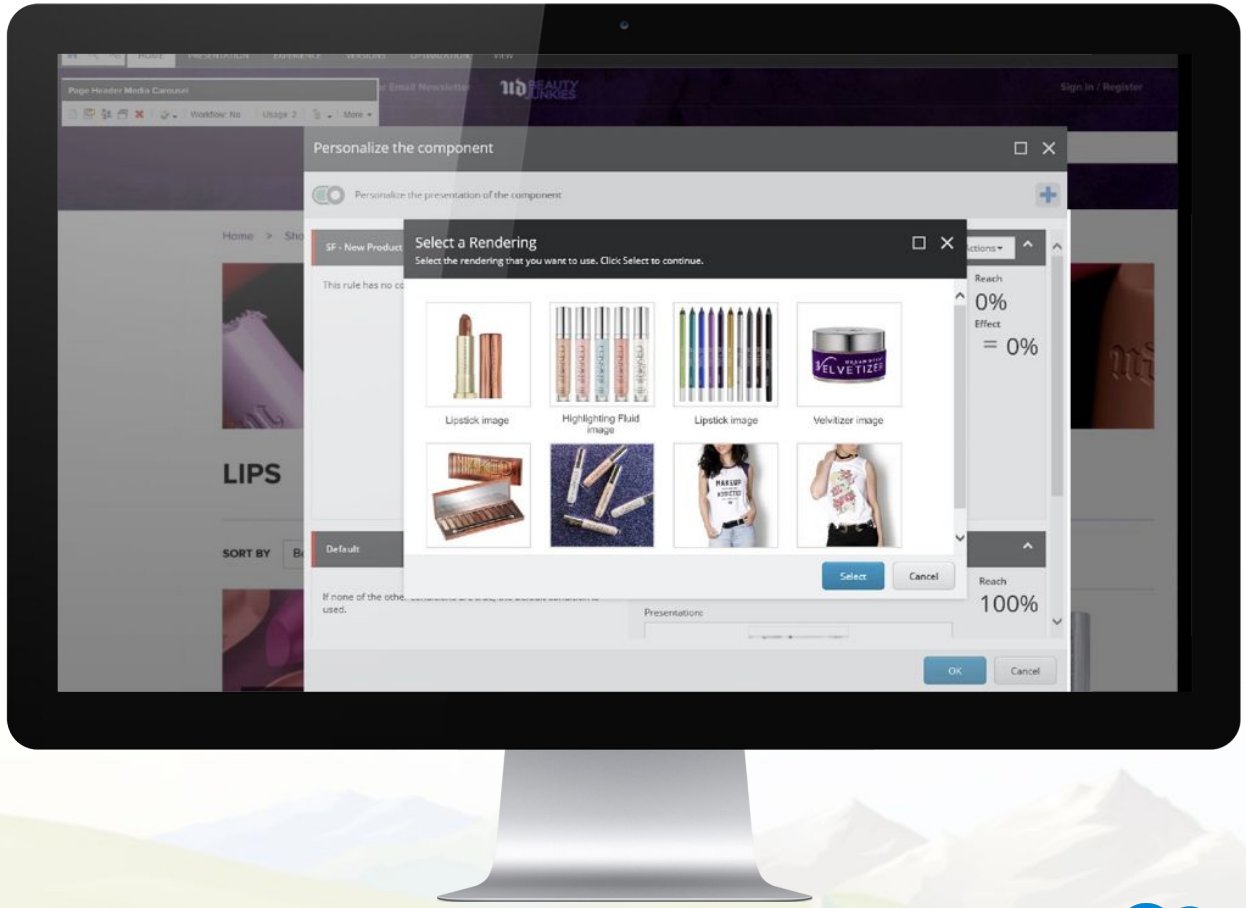
Sitecore Integration

Connect web content to Salesforce Marketing Cloud

Create a consistent experience
Share content across web and messaging channels

Real-time updates in Content Builder
Assets stored and managed in Sitecore enable real-time updates across all channels

Drive deeper personalization
By leveraging data and analytics from every interaction

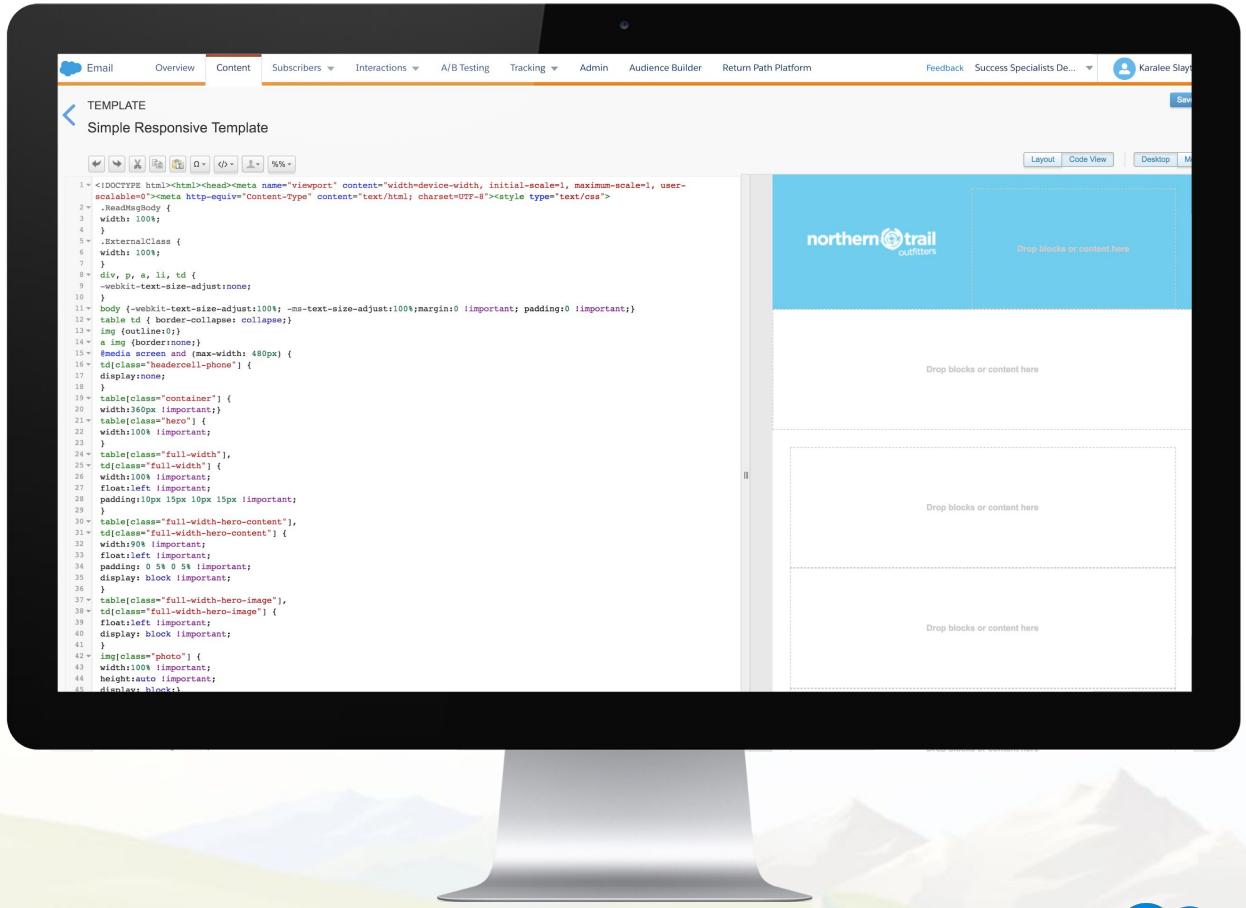


HTML Editor

Create HTML paste emails

When editing an HTML source, user-friendly features include:

- Auto-complete of HTML
- Tag matching
- Color coding
- Line numbers
- Automatic formatting
- Persistent preview
- Preview and testing



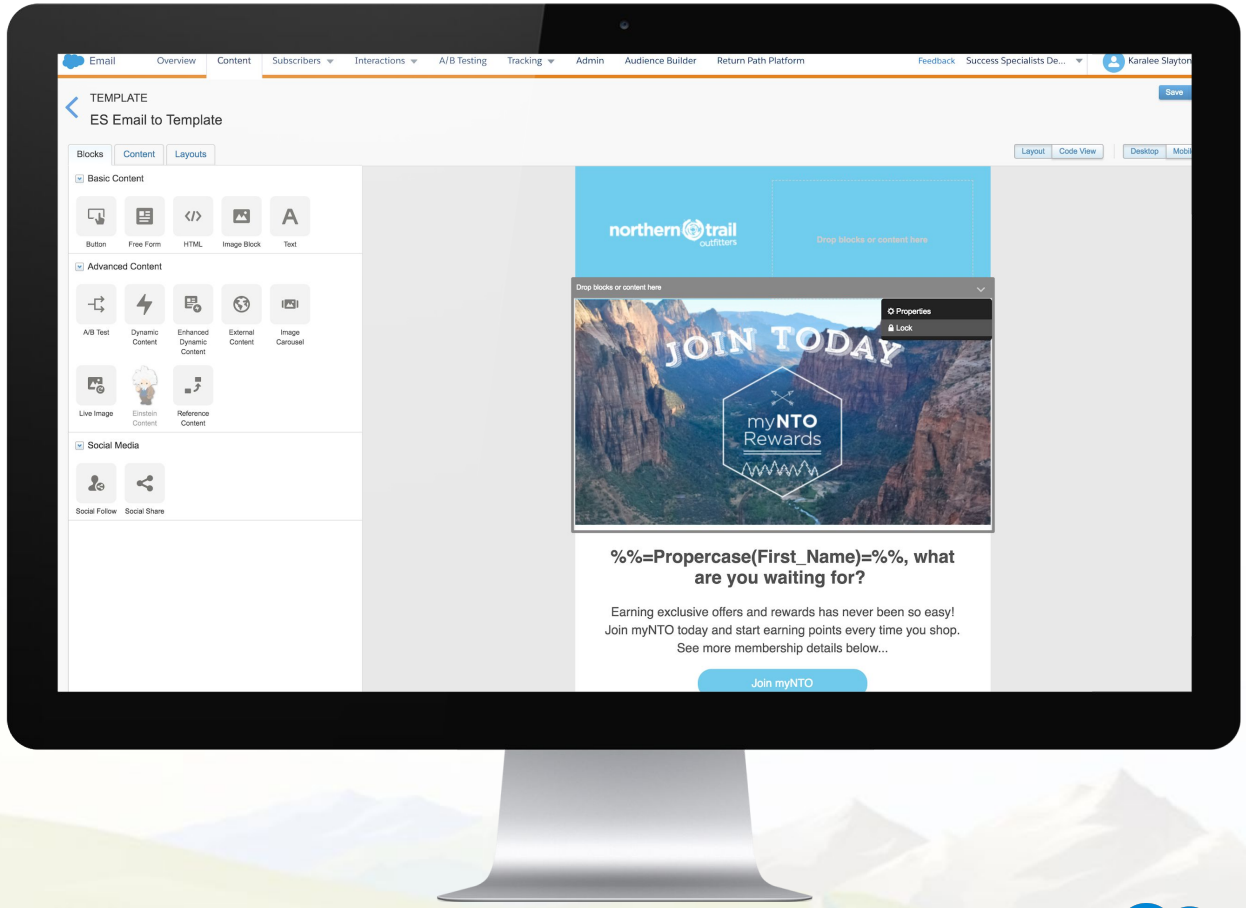
Locking Content in Templates and Emails

Provide more Enterprise control

Content can be locked in emails (previously only available for templates) before sharing with business units.

Emails shared with locked content areas enable users of recipient business units to only edit unlocked areas.

Content areas can be unlocked by the recipient business unit if they duplicate the email.

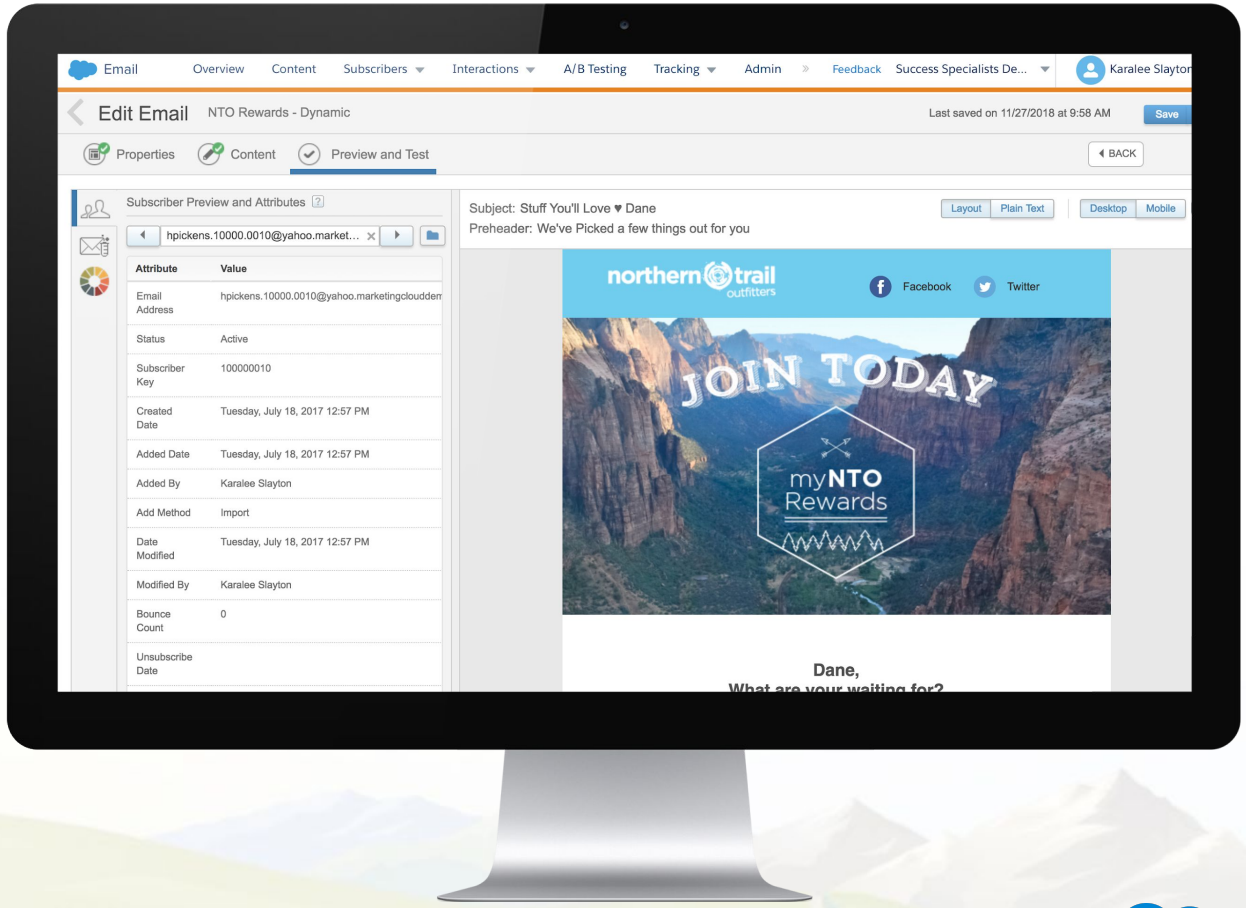


Preview and Testing

Ensure the accuracy of your email content

Preview desktop, mobile, and plain text preview features include:

- **Static and subscriber-specific previews:** Review personalization and business logic before sending.
- **Select subscriber from list or data extension:** Attributes and values are displayed.
- **Test send thresholds:** Test send to up to five email addresses or a test data extension.
- **Subject and preheader validation**: Prevent “test,” “draft,” or “proof” related emails from being sent to a customer.

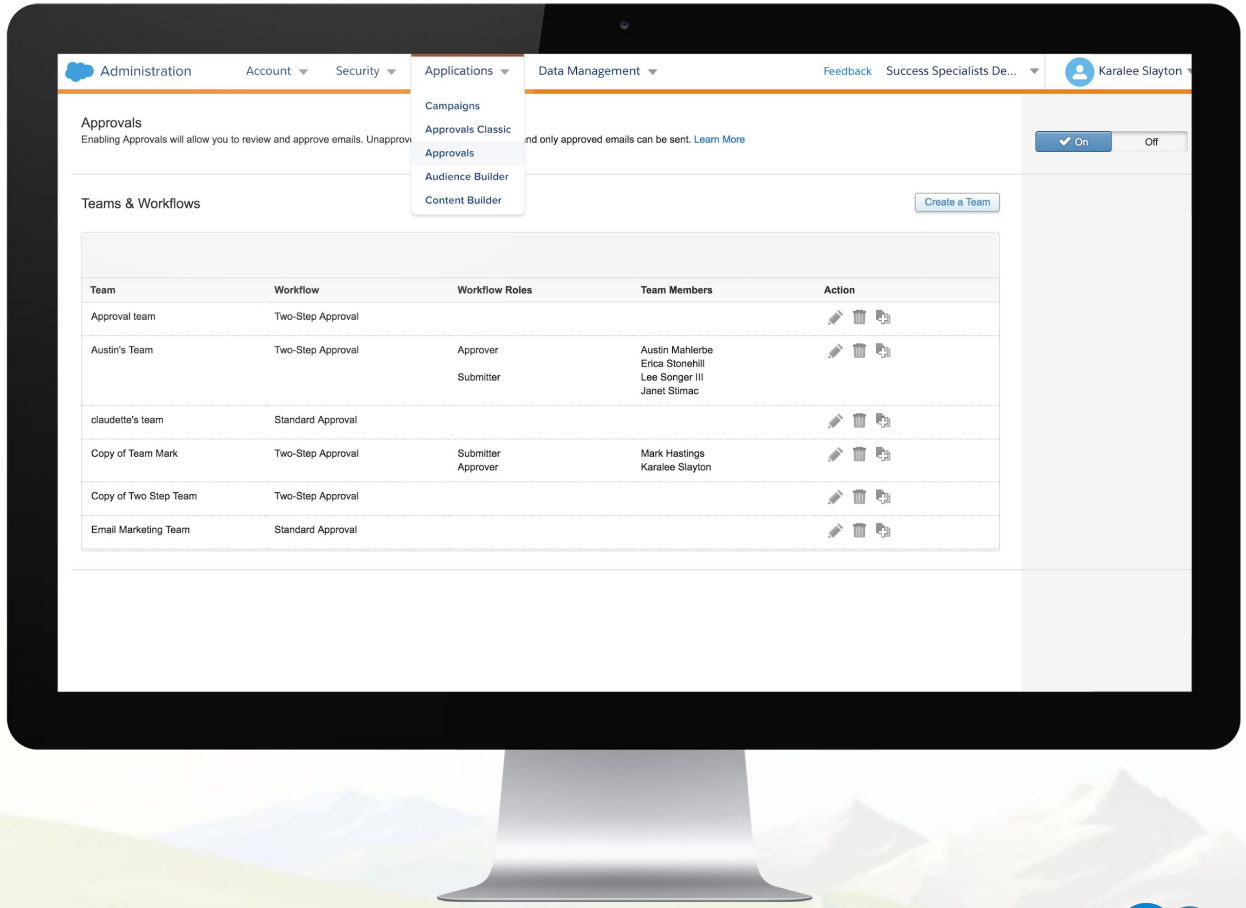


Email Approvals

Stay in control of your email campaigns

Streamline your user experience to facilitate a distributed approval process that ensures emails are not changed and delivered without approval. You can also:

- Quickly review and approve outgoing email company-wide.
- Keep communications consistent and on brand.
- Meet compliance requirements and improve deliverability.
- Communicate and track all revisions.
- Gain more administration flexibility with roles and teams.



Content Builder Administrative Considerations

Content Builder Permissions

Administrative considerations

Content Builder-specific permissions include permissions for managing:

- Files and content blocks.
- Folders within Content Builder.

Edit user permissions:

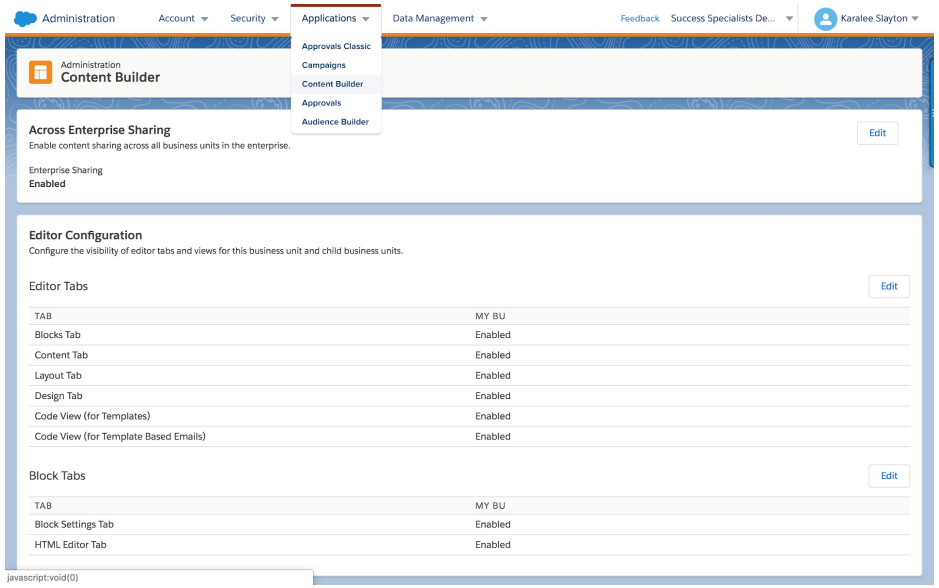
Administration > Users > [select user]> Roles> Edit Permissions> +ContentBuilder>

Content Builder permissions in the email application:

Content Builder emails and templates management

To edit user permissions:

Administration > Users > [select user]> Roles> Edit Permissions> +Email> +Content



Note: Content Builder permissions are mapped to the same roles as email content permissions. Please verify that any custom roles you have created are properly mapped. Learn more about Content Builder Permissions,

Content Builder Folder Organization

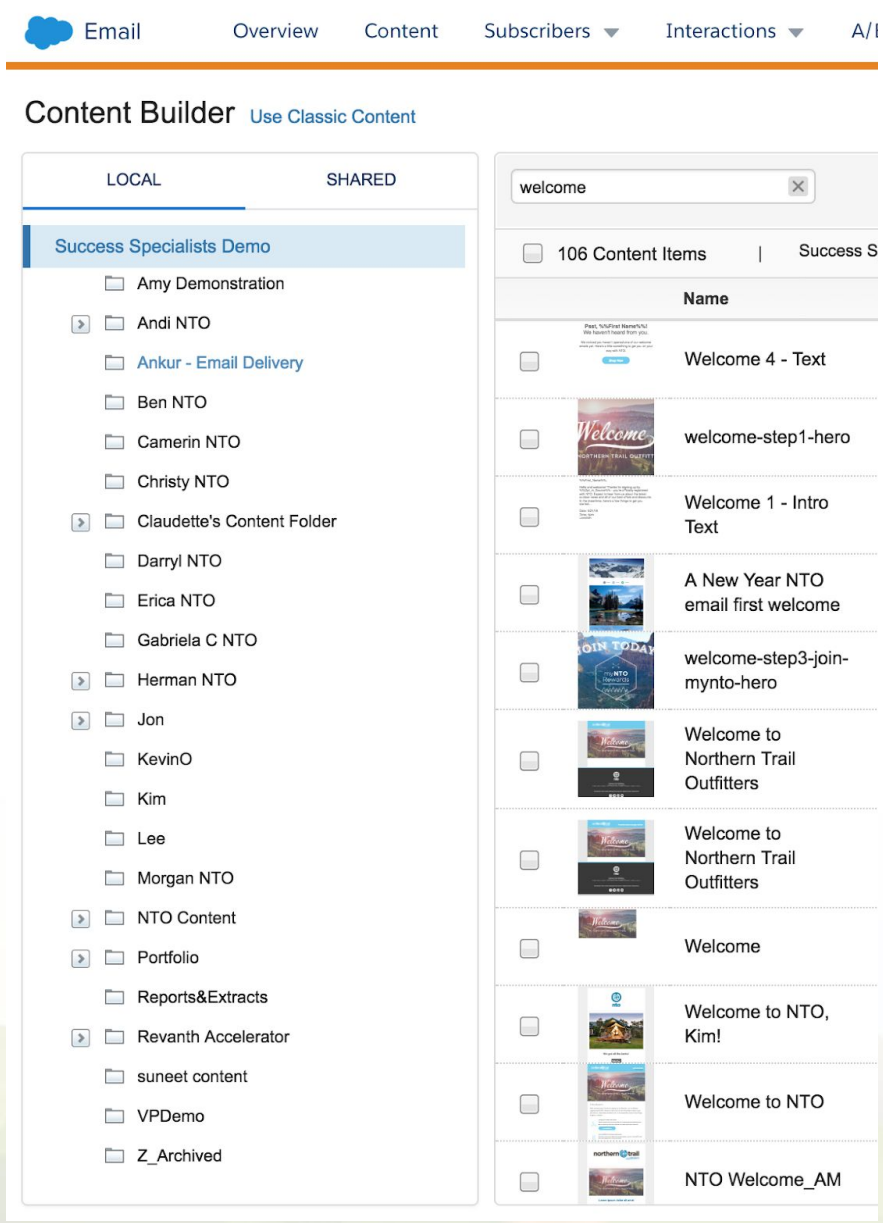
Administrative considerations

Things to think about:

- Consider your folder structure.
- Plan for all types of content to be together.
- Optimize your naming convention for search:
- Alphabetical order – numbers come first
- Use Z Test for test emails to sort at the bottom of the list
- Use ZZZ Archive for old unused content

Create tags in Administration to better search and filter content.

Begin to think cross-channel with content organization.



Learn how to “Organize Your Content”

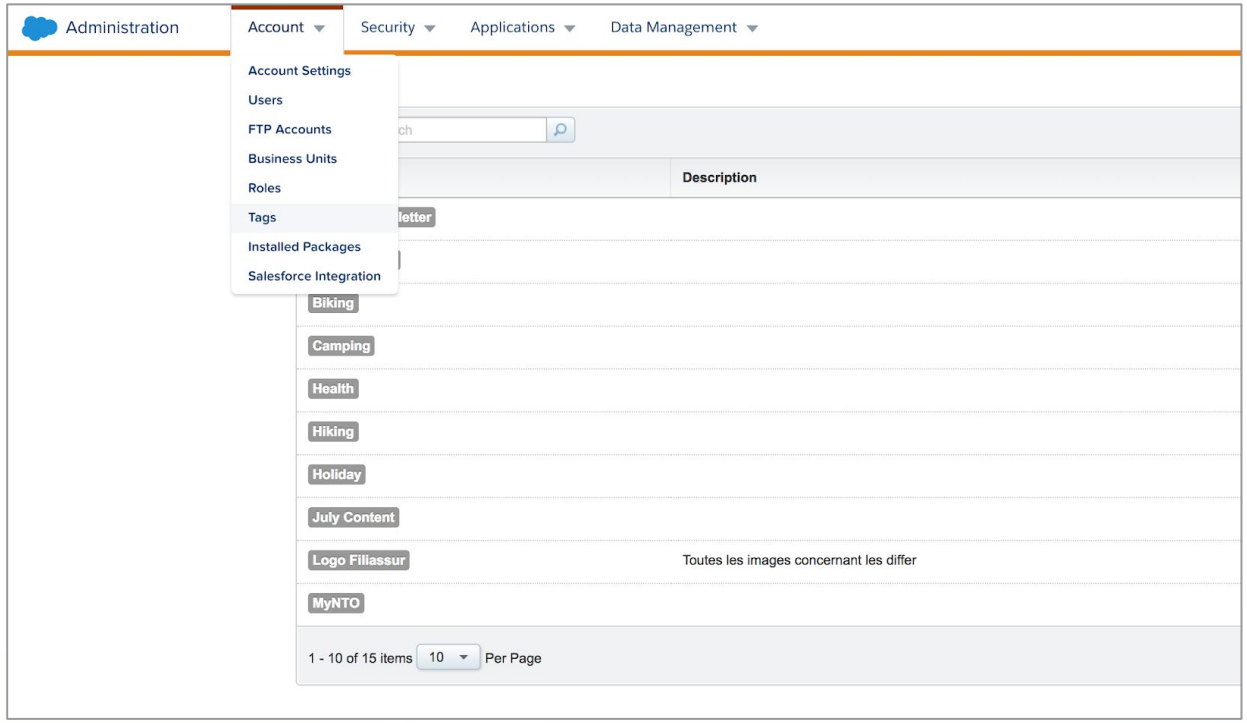
Creating Your Tag Dictionary

Administrative considerations

Tag words needs to be created in the Tag dictionary before users can tag content.

To access your dictionary, go to:
Administration > Account > Tags

You can also set permissions as to who can create new Tag terms in the dictionary in the Permissions section.



Preview and Testing

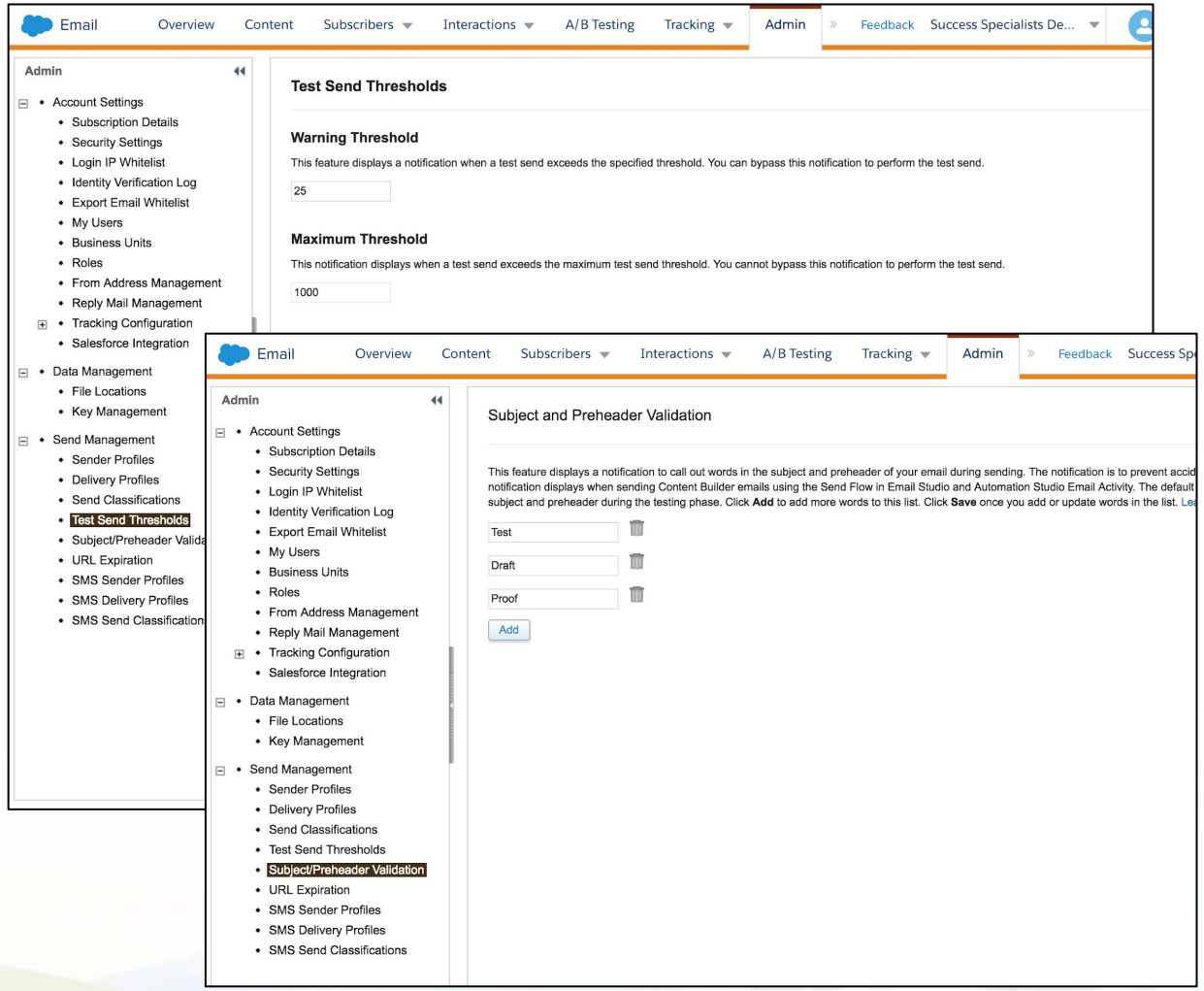
Administrative considerations

Test send thresholds:

- Test send to up to five email addresses or a test data extension.
- Setting test send thresholds are available in
- Email> Admin> Send Management > Test Send Thresholds.

Subject and preheader validation:

- Prevent “test” related emails from being sent to a customer.
- Setting test send thresholds are available in Email> Admin> Send Management > Subject/Preheader Validation.



Enabling Approvals and Creating Workflows

Administrative considerations

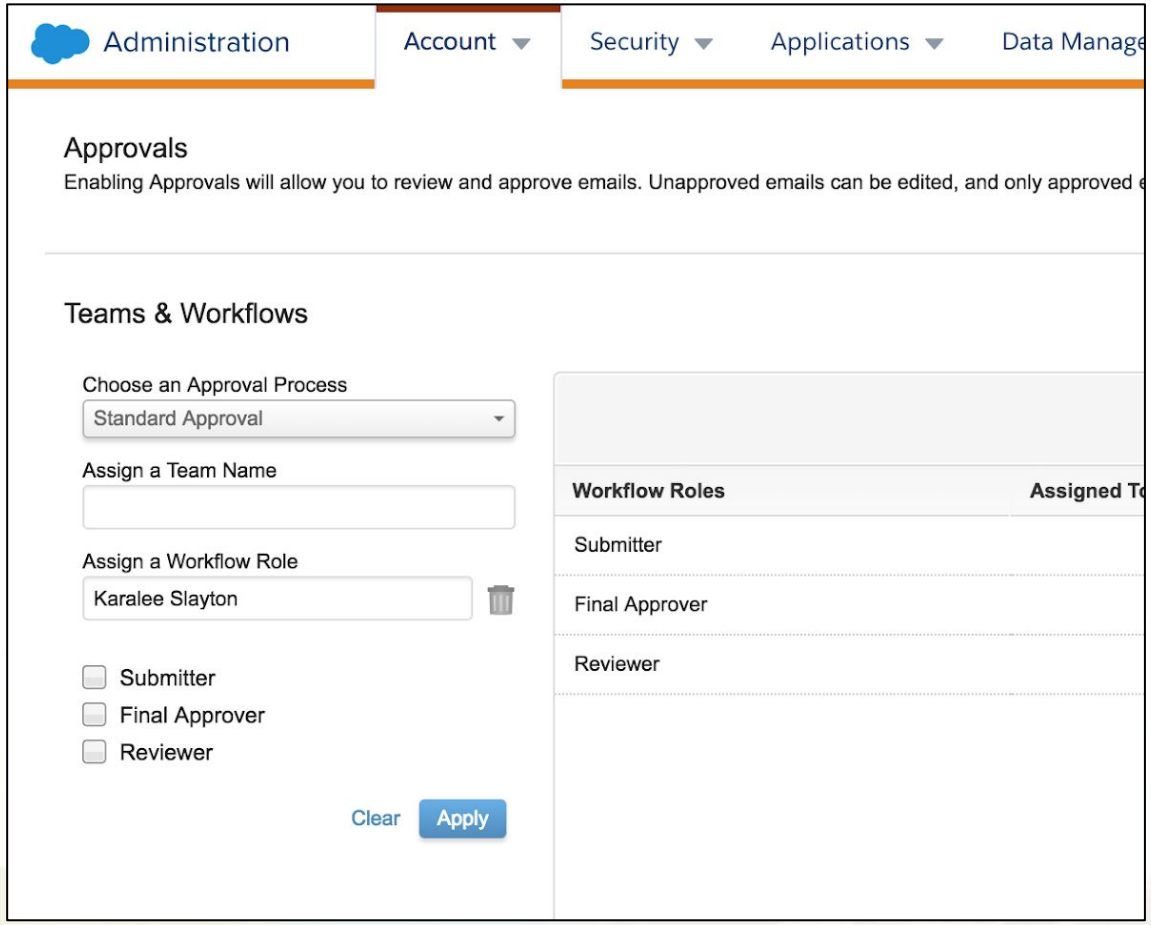
When Approvals is turned on, unapproved emails can be edited, and only approved emails can be sent. All current unapproved emails will be automatically approved.

The submitter needs the following permissions:

- Approval items: Create and edit
- Workflow teams: Add or remove users

When Approvals is turned off all emails can be edited and sent at any point.

Once you enable the Approvals process, each email message includes an Approvals status tab that signals the current status of the email message.



Content Builder Demonstration

Demo Outline

Suggested demonstration

Harbor Cruise Content Builder Canvas and Tools

Create and organize content:

- Review content types and each content block.

Create templates:

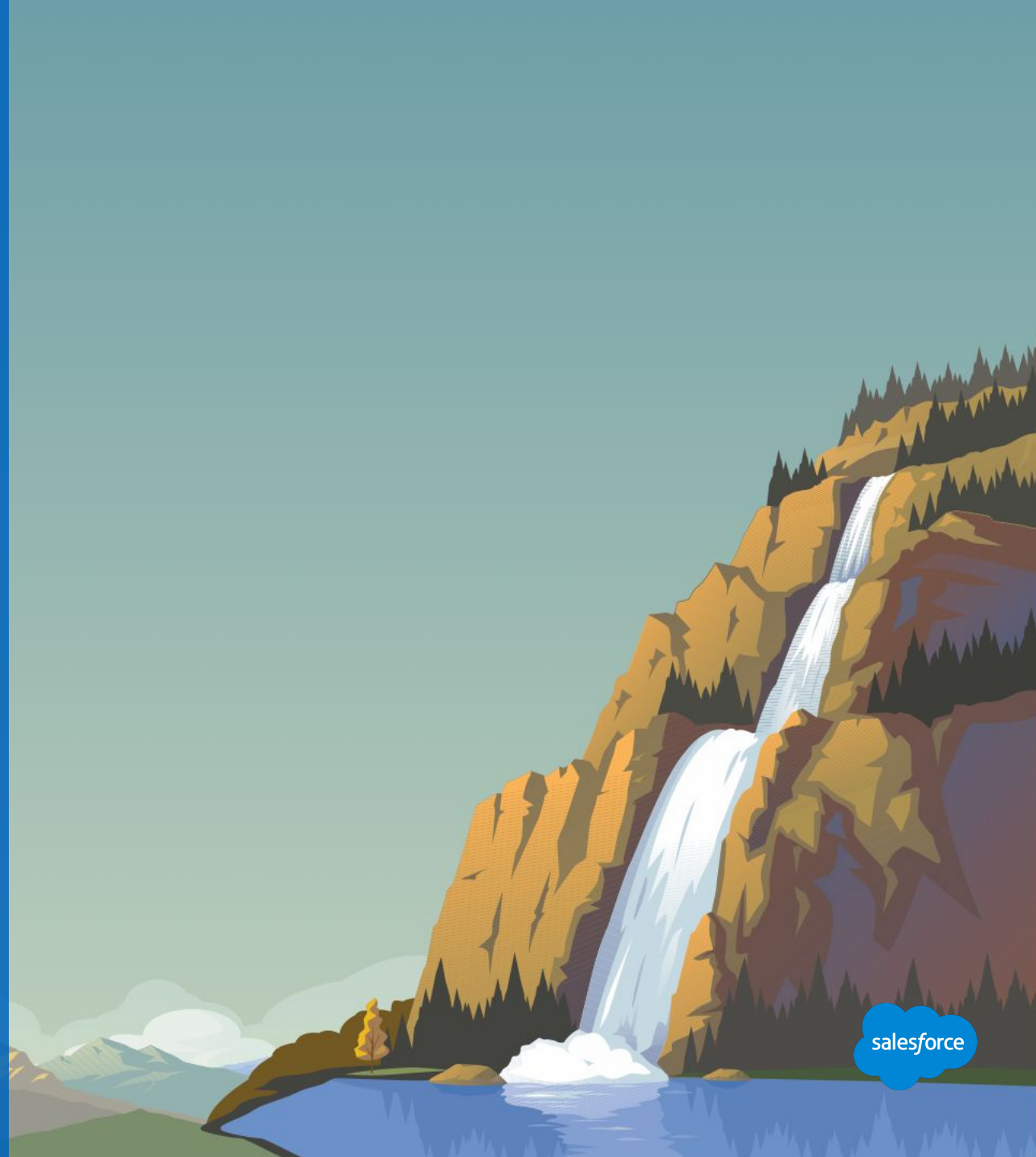
- Show how to create, edit, and save templates.
- Code view: HTML Paste & Code Snippets.
- Integrate blocks, layouts, and locking content.

Create emails:

- Drag, drop, and edit blocks, layouts, and content.
- Demonstrate building an email or use dynamic content to show the art of the possible.

If you have time, include preview, testing, approvals, and admin needs.

Moving from Classic Content to Content Builder



Classic Content End of Service (EOS)

For Classic Customers

Some Classic Content features are being retired starting in 2020

Currently

Can choose to create new email content in either Classic or in Content Builder, depending on need. Limited to selecting like-type content in messages.

When sending in Journeys, Automations, scheduled sends, etc. can choose either classic or Content Builder emails.

First Half 2020

Can no longer create classic emails. Existing classic content can be edited.

All running or scheduled classic sends including Automations and Journeys will continue to send.

Can import classic content into Content Builder and create new emails from classic emails.

Six months later

Can no longer edit existing classic content. All content is viewable only.

All running or scheduled classic sends including Automations and Journeys will continue to send.

Can import classic content into Content Builder and create new emails from classic emails.

What happens in 2020?
Starting in 2020, sometime between June 2020 and January 2021, users will no longer be able to edit emails with Classic Content tools but will continue to have view and send access to Classic Content. At this time, we have no plans to remove view and send access.

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For Classic Customers

What Do You Mean by Classic Content Features ?

Scope of Content Builder EOS

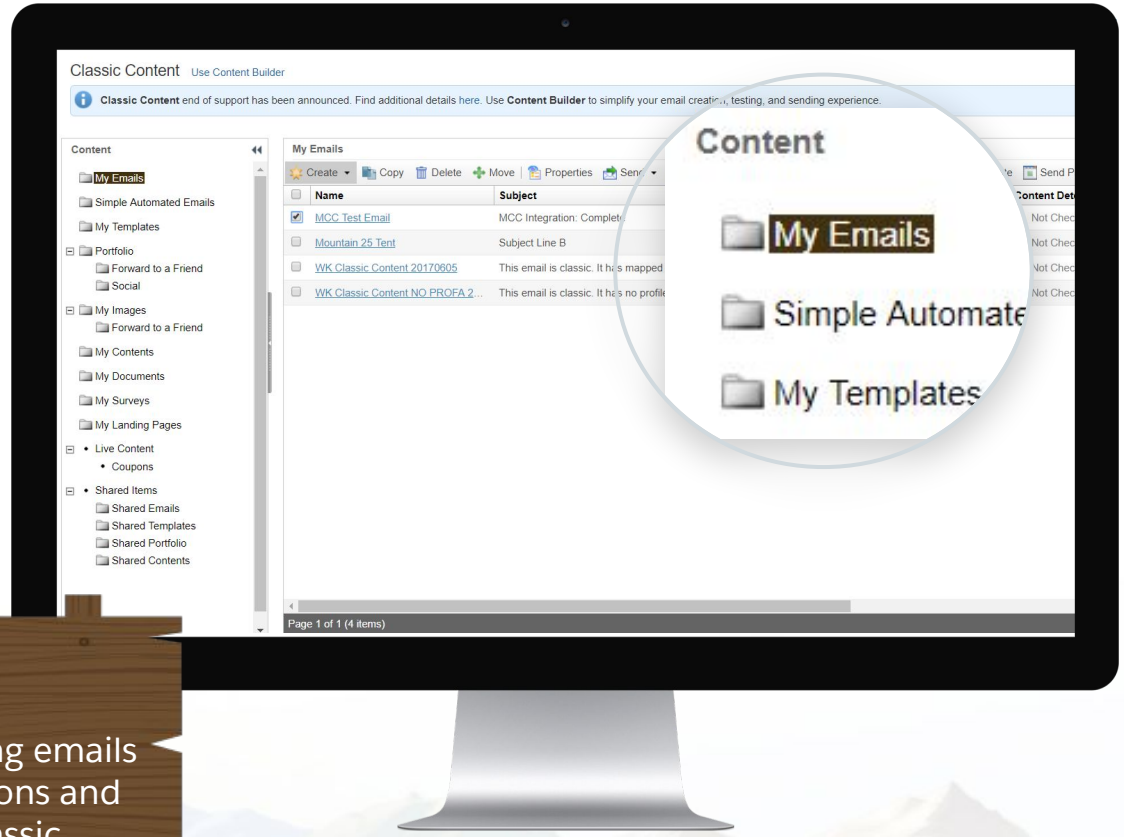
The Content Builder EOS only includes the Creation and Editing of Classic Emails

Access to the the following features will continue without change:

- Templates
- Portfolio
- Images
- Content Areas
- Landing Pages / MicroSites

The following Classic Email related features are also not affected:

- Distributed Sending
- Classic Email SOAP API's



No Changes

- Finding, Viewing and Sending emails
- Existing Journeys, Automations and Triggered Sends that use Classic Emails

For Classic Customers

Benefits of Content Builder

How You Can Benefit From Migrating to Content Builder

With the content repository, you can:

- Use our global search and filtering tools with a new content properties framework.
- Search and filter for the email of your choice.
- Add tags and campaign associations to associate-related content.

With the new editor you can:

- Save time with the easy-to-use interface.
- Create professional emails without knowing HTML.
- View changes to email content in real time with an always-present preview.
- Use more intelligent HTML paste tools such as color coding and line numbers.
- Insert code snippets for inserting common links such as Forward to a Friend, Open Tracking, and more.

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For Classic Customers

Moving Content From Classic to Content Builder

Import Assistant

Easily import from your Classic content:

- Portfolio
- My content
- My templates
- Shared folders

You can also import content as needed.

Create emails from existing Classic emails to quickly start using the new email creation tools and editor.

Importing content is seamless: Content remains in Classic content and files from a portfolio will receive a new URL. Existing file names will be retained for identification only.

There are two methods of import

1. **Folders and content:** Creates a copy of all selected folders and content and mirrors the Classic editor directory structure, such as My Emails, My Templates, and others. These top-level directories cannot be deleted.

2. **Content only:** Copies selected folders into a user-designated folder in Content Builder. This requires that you have an existing folder structure already created.

Note: Emails cannot be imported from Classic content to Content Builder. Only templates, portfolio files, and content can be moved using the Import Assistant.

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Moving Content From Classic to Content Builder

Top 7 Best Practices to Consider When Moving

1. Each piece of content can only be imported once.
2. Consider how you want to create your folder structure before starting the import process.
3. Think cross-channel.
4. Import shared content into Content Builder.
5. Optimize your content for search.
6. Import content only as you need it.
7. You can create Content Builder emails and templates using Classic emails as a starting point.

Benefits of Content Builder

Primary Reasons to Transition to Content Builder

For Classic Customers

The longer you wait, the more there is to move.

Enhancements are now applied to Content Builder and not Classic.

Take advantage of new features and improvements now.

Classic Content will eventually be discontinued.

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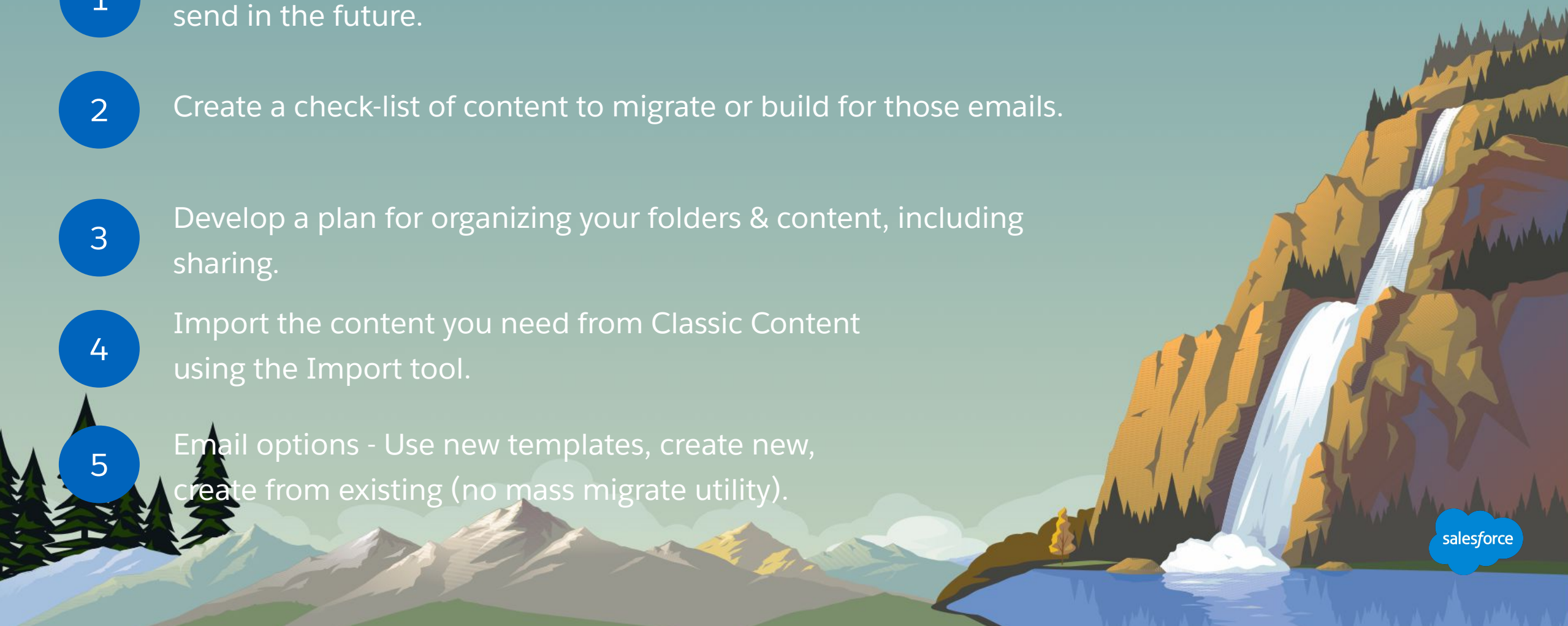
How do I prepare for Classic EOS? Build Your Migration Plan

For Classic Customers

Get Started Today - Suggested steps to help you along the way

1. Document the emails you are sending today, that will need edited to send in the future.
2. Create a check-list of content to migrate or build for those emails.
3. Develop a plan for organizing your folders & content, including sharing.
4. Import the content you need from Classic Content using the Import tool.
5. Email options - Use new templates, create new, create from existing (no mass migrate utility).



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For Classic Customers

Classic Content End of Service (EOS)

Frequently Asked Questions

Are there any existing features not available with Content Builder?

- Please view the Content Builder Considerations List and Deep Dive to review features that are coming soon, changed, replaced or are unavailable.

When updating content from a Classic Email to Content Builder Content, does anything need to be changed?

- When creating a new email in Content Builder from a classic email, the new content tools do not accurately copy some of the content created using the old tools. Review your new email and make any necessary updates to the content.
  This includes:
  - **Dynamic Content and Subject Line** - The new content tools remove Dynamic Content entirely. Recreate your Dynamic Subject Line and Dynamic Content with the new tools.
  - **A/B Content** - The new content tools remove A/B Content entirely. Recreate using A/B Test with the new tools.
  - **AMPscript Referencing Classic Content** - Your email may contain AMPscript references to classic content. Use the new AMPscript functions and update existing AMPscript functions to reference content in Content Builder.
    Learn more about the new Content AMPscript Functions.
  - See Full List Here
- Use the **Content Builder** resources found at the Classic Content EOS page in online Help.

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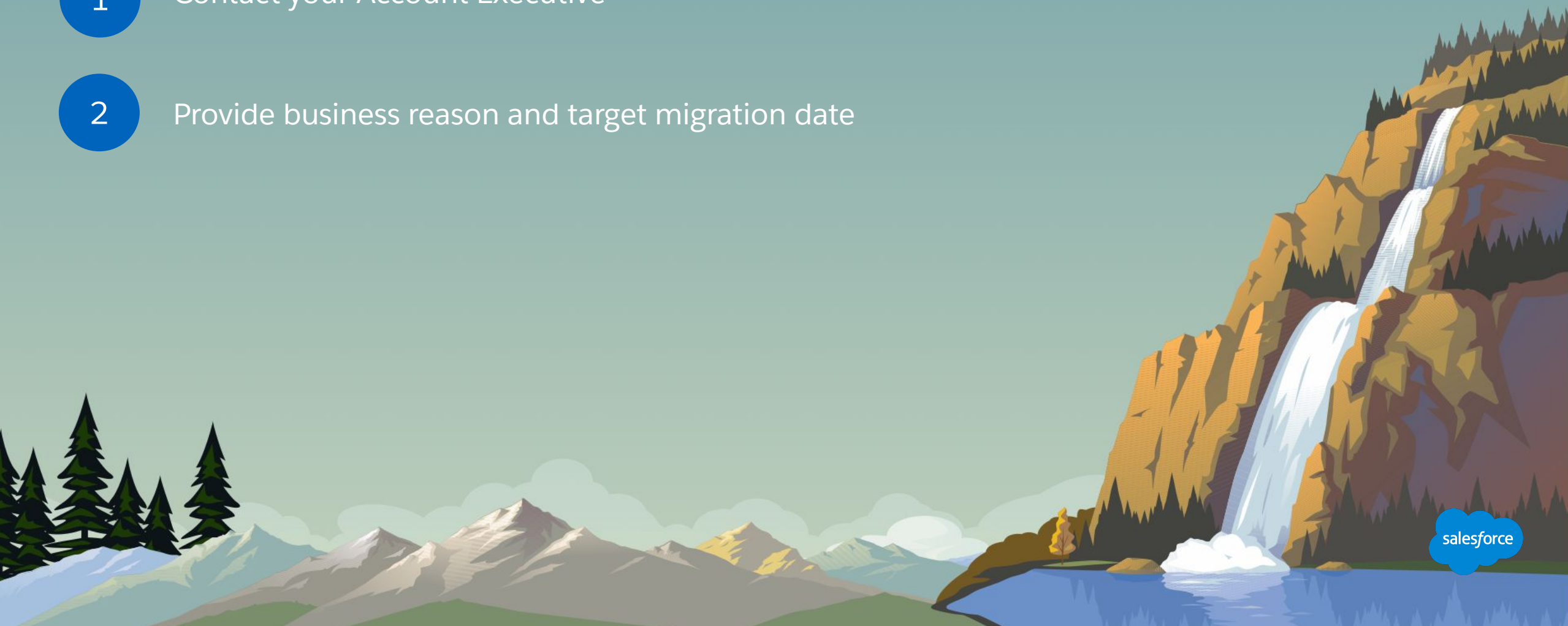
Still Need to Use Classic Email?

Classic Email extension process

For Classic Customers

1. Contact your Account Executive
2. Provide business reason and target migration date



Next Steps and Resources

Your Next Steps

Implement and adopt what you learned - Suggestions:

Plan Your Content Structure

Plan for all types of content to be together and develop a common naming convention.

Consider your folder structure and sharing rules.

Optimize your naming convention for search so your content is easily searchable.

Decide on keywords for your Tag Dictionary.

Setup Your Administrative Settings

Set up your permissions for each user.

Create approval workflows.

Set up your test send thresholds.

Set up your subject line and preheader validation criteria.

Create your Tag Dictionary.

Import Content and Create Standards

Use existing content.

Import content from Classic.

Plan and create standards for all emails.

Decide on content standards to lock.

Create content blocks.

Create templates.

Further Your Knowledge

Review this deck and videos so you can enable the rest of your team.

You'll find additional resources over the next several slides.

Creating a Template

Content considerations

Use Case	Considerations
Challenge: You want to create a Template.	• Will you use a pre-built template? • What AMPscript or dynamic content is required in the template? • What placeholders are required? • How many content areas are required to hold content blocks? Keep in mind you can drag multiple content blocks into a content area. • What and how many content blocks need to be developed? • Are code snippets required? • Is there an available test audience? • Who needs to receive proofs? • Are there multiple versions to be proofed?
Solution: A Content Builder template can be created in two ways, through the selection of an existing template, or through HTML paste. You can also use any of Content Builder's out-of-the-box responsive templates, electing one of the basic or themed options instead.	
Resources: **Video:** Create a Template **Documentation:** Build a Template Based Email	

Creating an Email

Content considerations

Use Case	Considerations
Challenge: You want to create an Email and you want to maximize WYSIWYG interface.	• **Will you use a template? What placeholders or locked content are required?** • **Do you need to adjust the layout?** • **What and how many content blocks need to be developed?** • **Are code snippets required?** • **Is there an available test audience?** • **Will this email be shared?** • **Who needs to receive proofs?** • **Are there multiple versions to be proofed?**
Solution: Content Builder provides a great drag-and-drop environment to build emails that render across virtually every device.	
Resources: **Video:** Create an Email in Content Builder **Documentation:** Create an Email	

Creating an Email From an Existing Classic Email

For Classic Customers

Content considerations

Use Case	Considerations
Challenge: You want to create an email using an existing email you have in Classic. Or Migrate new creative into Content Builder.	• What folder was the original email saved to? • Is the existing email a template-based email or a paste HTML email? • Is the existing email using a shared template? • What content needs to be altered? What remains the same? • Who needs to receive proofs? Are there multiple versions to be proofed? • Will this email be shared? • Is there an available test audience? • What AMPscript or dynamic content is required?
Solution: Content Builder allows the ability to create a new Content Builder email based upon an existing email created in either Content Builder or Classic.	
Resources: **Video:** Add & Import Content **Documentation:** Build an Email from an Existing Email	

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Creating an Email From an Existing HTML Email

Content considerations

Use Case	Considerations
Challenge: You want to create an email using an existing email or template you created entirely outside of Content Builder.	• What folder was the original email saved to? • Is the existing email a template based email or a paste HTML email? • Is the existing email using a shared template? • What content needs to be altered? What remains the same? • Who needs to receive proofs? Are there multiple versions to be proofed? • Will this email be shared? • Is there an available test audience? • What AMPscript or dynamic content is required?
Solution: Content Builder makes it easy to paste and preview code and add required elements. The HTML paste option is used when an email or template is coded entirely outside of the Email Editor.	
Resources: **Documentation:** Build a HTML Paste Email	

Creating Content Blocks

Content considerations

Use Case	Considerations
Challenge: You want to create reusable content.	• What and how many content blocks need to be developed? • What naming convention should you follow? • What folder should this content be saved to? • Does this content need to be shared or not shared across particular business units? • Will this content block be used for more than email, such as Cloud Pages? • How should this content be tagged for easy search optimization?
Solution: Create reusable content blocks, including text, HTML, images, buttons, dynamic content, and A/B testing, to ensure relevant messaging reaches the right person every time.	
Resources: **Documentation:** Create Content Blocks	

Creating Code Snippets

Content considerations

Use Case	Considerations
Challenge: You want to create a Code Snippet.	• What and how many code snippets need to be developed? • Do you already have the code or will you need someone to create the code? • What naming convention should you follow? • What folder should this content be saved to? • Does this content need to be shared or not shared across particular business units? • Will this code snippet be used for more than email, such as Cloud Pages? • How should this content be tagged for easy search optimization?
Solution: Code Snippets will allow non-technical people to use bit of code.	
Resources: **Video:** Create advanced Templates with Code Snippets **Documentation:** Create Code Snippet	

Next Steps

Where to go from here

1. Join the Salesforce Marketing Cloud Trailblazer Community
2. Take the Content Builder Basics Trail
3. **Premier Customers:** Request your 1:1 with a Salesforce Success Specialist and plan your next Accelerator (1:1 follow-up request is in the survey).
4. Not a Premier Customer but Interested in Learning More? **Reach out to your Salesforce Account Team** for more details.

We Can Guide Customers Every Step of the Journey

With resources, programs and experts to fit their needs

Adoption Services

Accelerators
Interactive Webinars & Events
Proactive Engagement

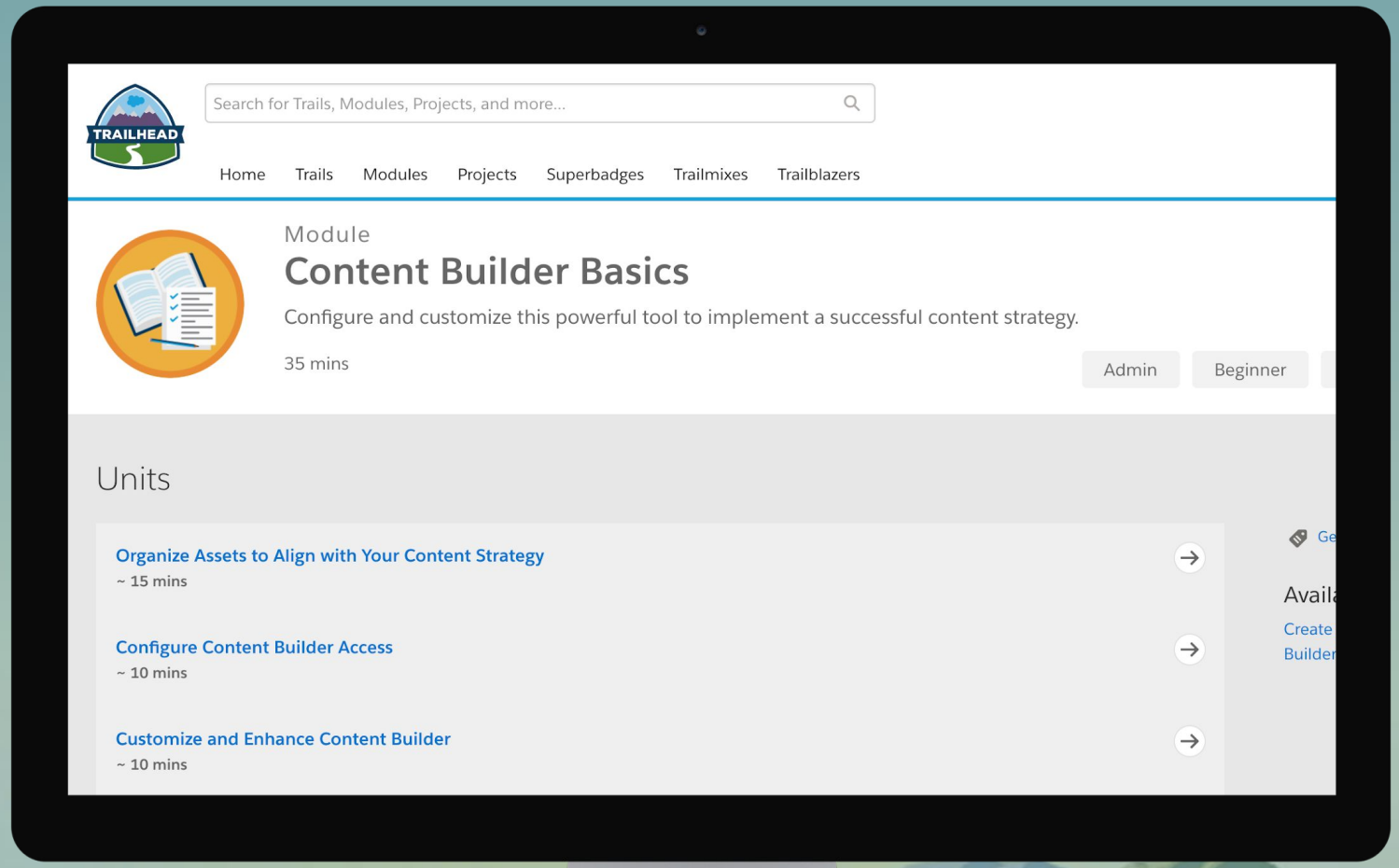
Always On Resources

Trailhead
Success Communities
Help Portal

Advisory Services

Architects
Customer-Centric Design
Strategic Services
Transformation Services

Take the Content Builder Basics Trail



Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators		✓
Developer Support		✓
Success Management		✓
Circles of Success		✓
Interactive Webinars		✓
Admin Assist		optional upgrade
Support	12/5 Online 2-Day Response	24/7 Phone & Online 1-Hour Critical Response

[Learn more about Premier Success]

Upcoming Webinars

Marketing Cloud Events

Getting Started: Marketing Cloud: Content Builder Accelerator LIVE

Register Here

Getting Started: Journey Builder: Journey Strategy Accelerator LIVE

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Marketing Cloud Ask an Expert Office Hours

Every Tuesday and Thursday

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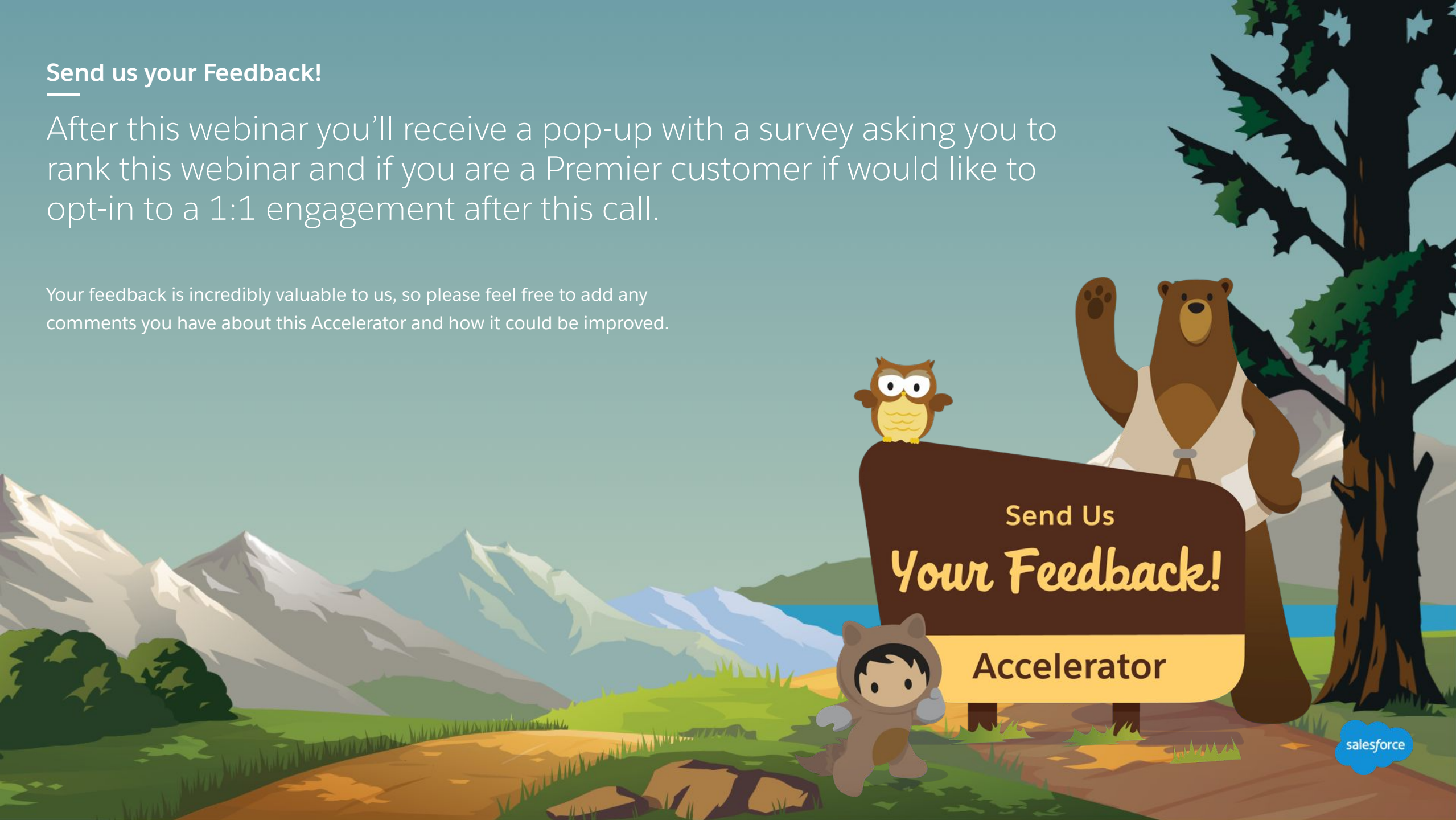
Questions?

Send us your Feedback!

After this webinar you'll receive a pop-up with a survey asking you to rank this webinar and if you are a Premier customer if would like to opt-in to a 1:1 engagement after this call.

Your feedback is incredibly valuable to us, so please feel free to add any comments you have about this Accelerator and how it could be improved.



Thank you