Getting Started: Marketing Cloud: Data and Segmentation Basics

Accelerator Webinar

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

This webinar will begin at 1:05 pm EDT

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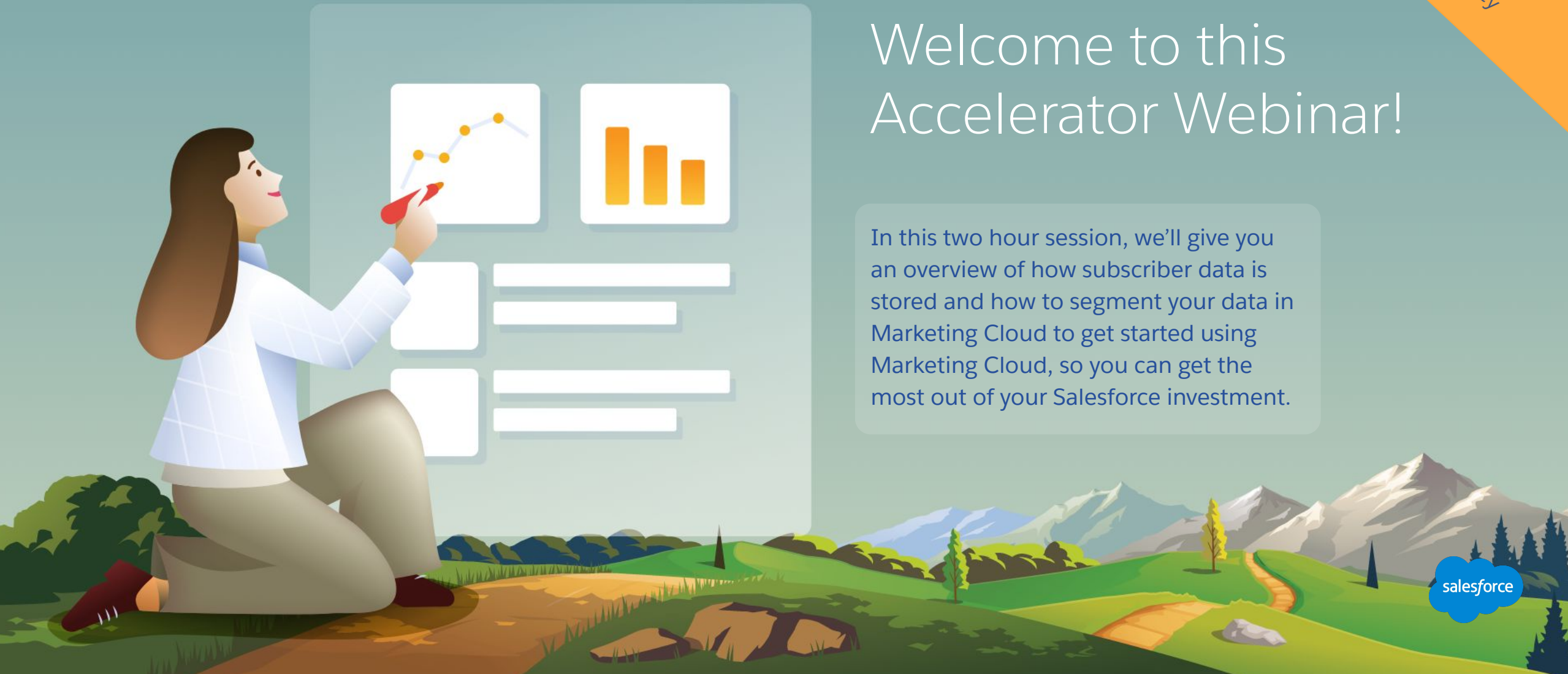
follow-up in the survey
after this call.

Welcome to this Accelerator Webinar!

In this two hour session, we'll give you an overview of how subscriber data is stored and how to segment your data in Marketing Cloud to get started using Marketing Cloud, so you can get the most out of your Salesforce investment.



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Agenda

Accelerator Webinar

- Accelerators

  Overview. Reach success faster with targeted engagements.
- What We'll Cover, Key Steps, and Timelines

  Discuss the scope of this Accelerator Webinar.
- <Engagement-Specific Content>

  <Description here>.
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  <Description here>.
- <Engagement-Specific Content>

  <Description here>.
- Demo

  <Description here>.

1:1 Follow Up (upon request)

- Review Common Use Cases

  <Engagement-specific description>
- Hands-on Activity

  <Engagement-specific description>
- Recommendations

  Learn next steps.
- Product Roadmap

  See what's coming next.

Agenda

Accelerator Webinar

- **Overview**
  What challenge are we solving for you?
- **Understanding Data in Marketing Cloud**
  Learn the benefits and best practices of Data Extensions.
- **Contact Builder Overview**
  Understand at a high level how Contact Builder can help you model your data.
- **Demonstration - How to Create Your Audience**
  Learn to create data extensions, add subscribers, and create data relationships in Contact Builder.
- **Understanding Data Filters**
  The basics of segmentation.
- **Demonstration - How to Target Your Audience**
  Learn how to create Filter Definitions and use the drag and drop filters in Marketing Cloud.
- **Additional Data Best Practices**
- **Resources & Next Steps**
  Learn about other Resources and Accelerators to continue your progress.

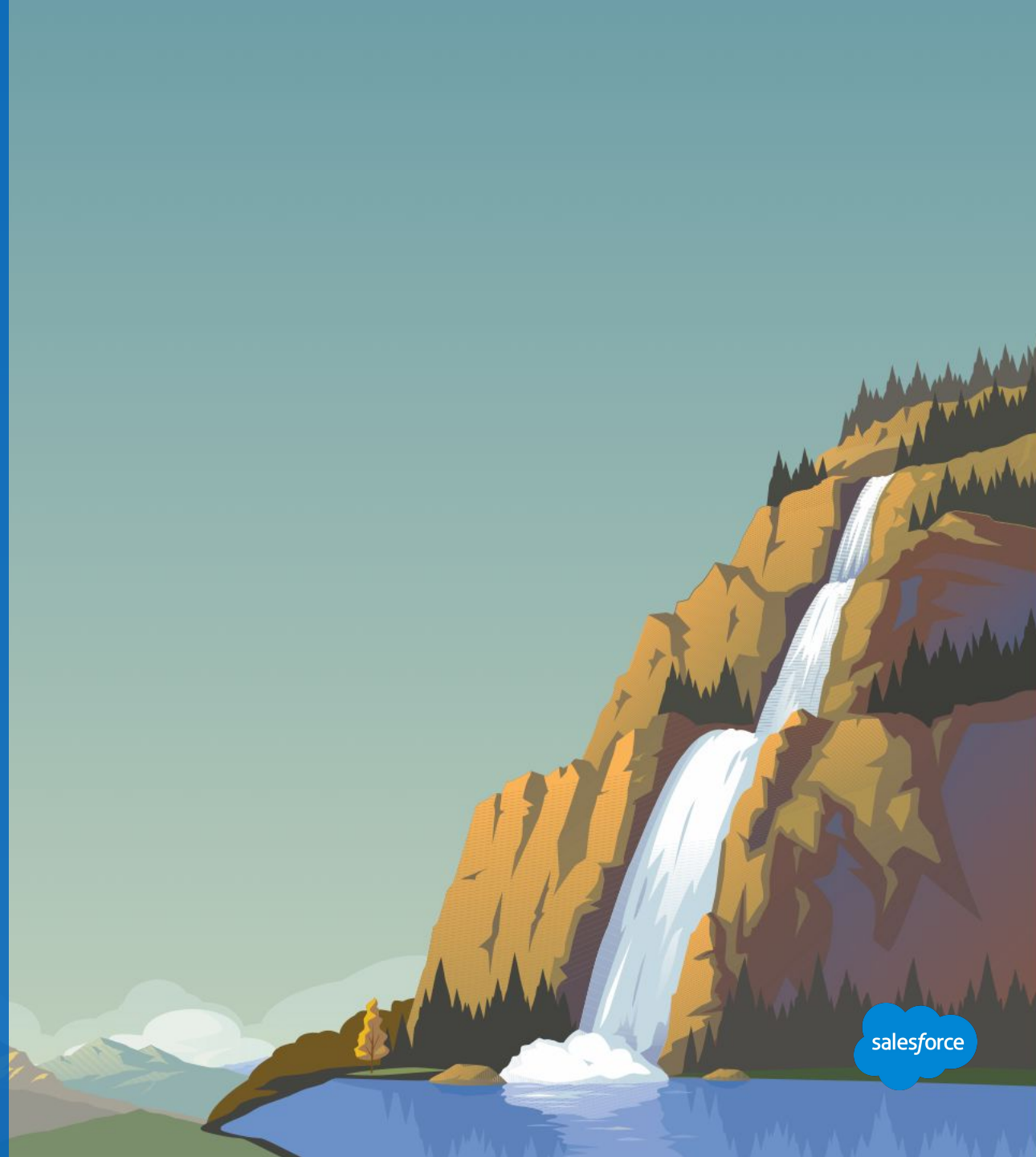
Overview

What challenge are we solving for you?

What you can Expect from this Accelerator:

- Learn how subscriber data is stored in Marketing Cloud.
- Learn best practices for modeling data to support segmentation.
- Walk through how to create and filter a data extension.
- Learn best practices for data retention to start off down the right path to success.
- Understand data capabilities available within Marketing Cloud to help you be successful.

Understanding Data basics in Marketing Cloud



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

DIRECTIONS HOW TO USE THIS SECTION

This Demo section outlines data in Marketing Cloud at a high level, to set customers down the right path for success.

We have removed Lists from this data conversation for all new customers.

Should a customer ask about lists, here is a statement you can use:
Lists are a legacy feature, that is still around great for those who are only sending to a few hundred subscribers and only using email studio, but not as flexible as data extensions, and not used with Journey Builder or Mobile or any other application in Marketing Cloud, so we suggest doing everything in Data Extensions.

Lists are not planned on being deprecated, but going forward we suggest ALL customers utilize Data Extensions.

Why Data Structure Matters

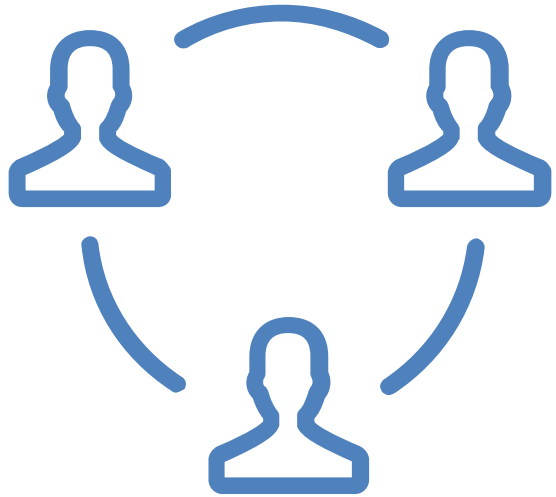
Making data available for segmentation, personalization and analytics

To deliver exceptional customer experiences, marketers need a complete view of their customers.

Data silos and bulky workflows often keep data separated and inactionable.

Marketing Cloud solves challenge as the customer system of record for audiences and audience creation.

Contacts unify relationships across sources to strip away silos and make data available right time, right message, right channel.



What is a Subscriber?

Someone who has opted to receive communications from your organization

Subscriber - At a minimum, you must have a valid email address for each subscriber who receives emails or a valid phone number for each subscriber who receives SMS messages.

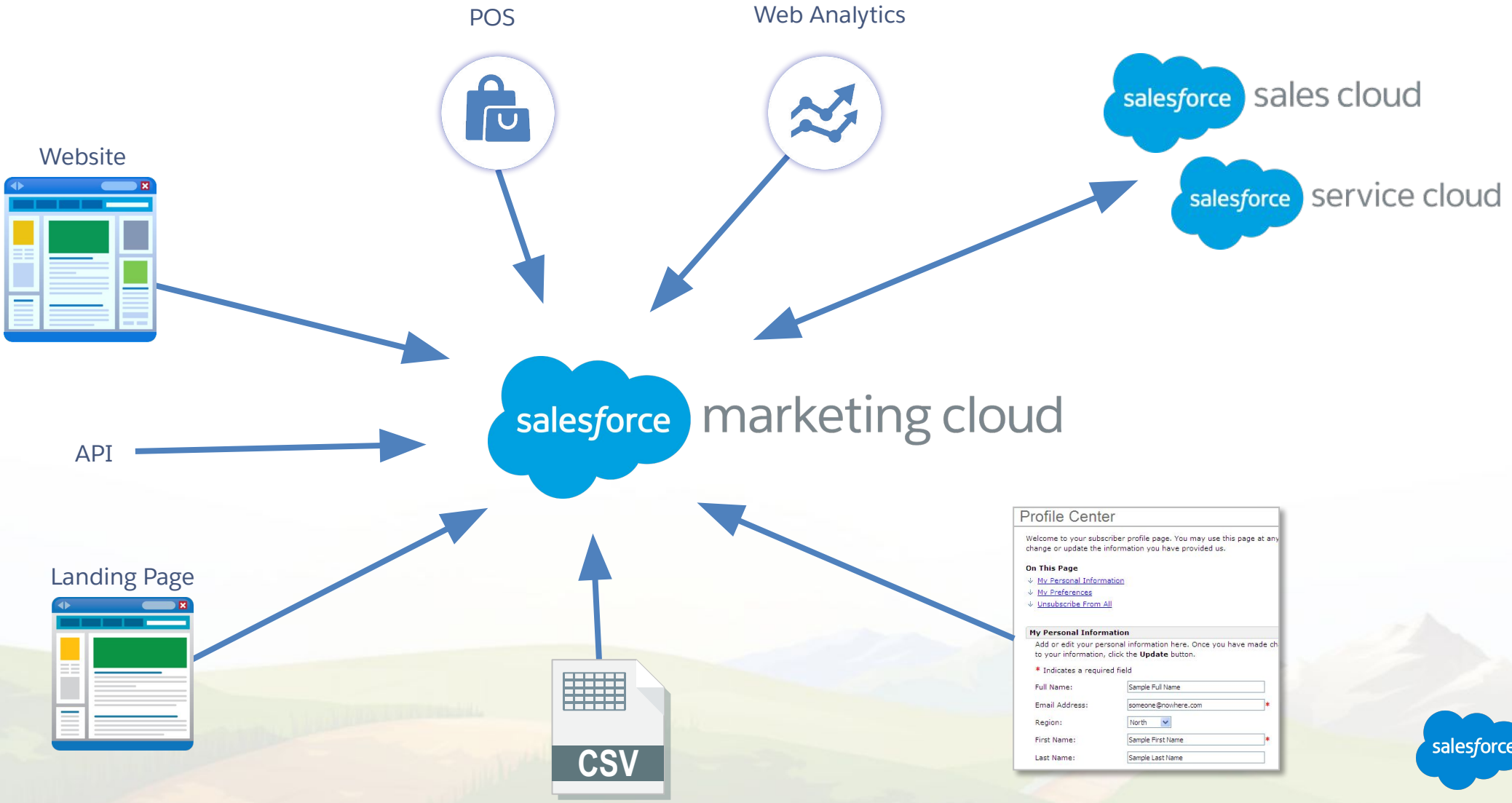
In Marketing Cloud you can:

- Track information about subscribers.
- Uniquely identify your subscribers in Marketing Cloud: Subscriber Key.
- Create data extensions to store your subscribers.
- Populate data extensions when you add or import subscribers.
- Segment your subscribers by filtering data extensions to send more targeted messages to your subscribers.

Subscribers you send emails to are automatically added to the All Subscribers list in your account. This is the Master list of records in your Marketing Cloud Email Studio Account.

Subscriber Data Sources

What does your data look like?



How Data is Stored in Marketing Cloud - What is a Data Extension?

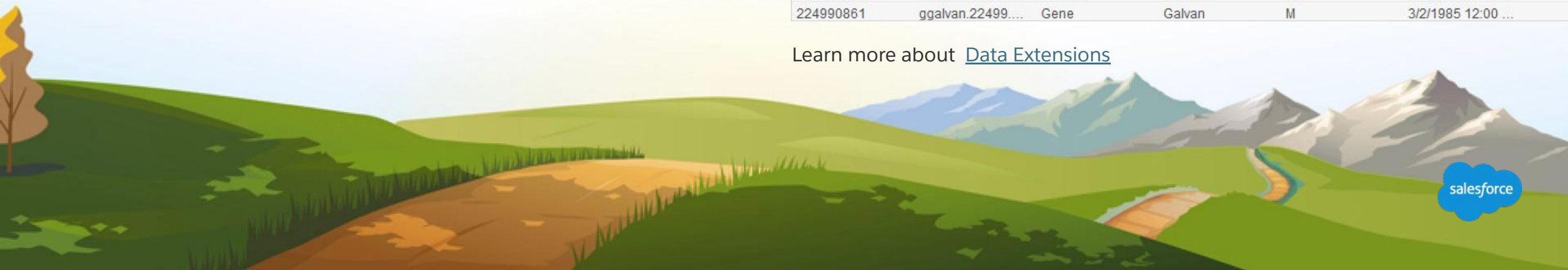
Simply a table in the Marketing Cloud that stores your data

With data extensions, you can:

- Import information from other systems into Marketing Cloud.
- Send a message to subscribers in a data extension.
- Exclude subscribers in a data extension from a send.
- Include customer-specific information from a data extension in a message.
- Collect the subscriber information of people who trigger a triggered send.
- Create dynamic content in an email content area.

SubscriberKey	EmailAddress	First_Name	Last_Name	Gender	DOB	Addre
224990833	mhaskell.2249...	Melvin	Haskell	M	7/19/1991 12:0...	
224990834	ribarra.22499.0...	Rachell	Ibarra	F	8/10/1998 12:0...	
224990835	jcalabrese.224...	Jerrie	Calabrese	F	6/29/1956 12:0...	
224990836	ctracy.22499.08...	Chong	Tracy	M	1/22/1989 12:0...	
224990837	educkett.22499....	Emory	Duckett	M	11/25/1995 12:0...	2151 D
224990838	gloveless.2249...	Grady	Loveless	M	7/23/1965 12:0...	
224990839	mgriffith.22499....	Mose	Griffith	M	9/17/1963 12:0...	
224990840	dchristman.224...	Devin	Christman	M	9/30/1960 12:0...	
224990841	ncreighton.224...	Nikki	Creighton	F	11/17/1970 12:0...	
224990842	jbrinkman.2249...	Jamel	Brinkman	M	9/20/1950 12:0...	
224990843	rengland.22499...	Rolando	England	M	1/26/1973 12:0...	4814 H
224990844	kdobbins.2249...	Krishna	Dobbins	F		
224990858	lmedlock.22499...	Lamar	Medlock	M	3/23/1972 12:0...	
224990859	mwaterman.22...	Margareta	Waterman	F	8/29/1966 12:0...	
224990860	hludwig.22499....	Herbert	Ludwig	M	6/8/1983 12:00 ...	
224990861	ggalvan.22499....	Gene	Galvan	M	3/2/1985 12:00 ...	

Learn more about Data Extensions



Different Types of Data Extensions

There are three main types of Data Extensions

1. Data Extensions	2. Salesforce Data Extensions	3. Synchronized Data Extensions
Any native data source directly imported into Marketing Cloud.	Data imported from a Sales Cloud report or campaign.	Used by a Synchronized Data Sources and includes Salesforce objects only.

Data extensions can be sendable or not sendable:

A sendable data extension
Maps to a subscriber- must identify a Subscriber/Contact **Includes a unique identifier** **Can be the target for a send** **Can be the target for a test send if marked testable**
A data extension that is not sendable is typically orders, product tables, and store tables.

Note: You can share data extensions and Salesforce data extensions if you have Enterprise Edition

Subscriber Key

Uniquely identify Subscribers for Email

A subscriber key is a text field that contains a unique value assigned to each subscriber.

The subscriber key is used:

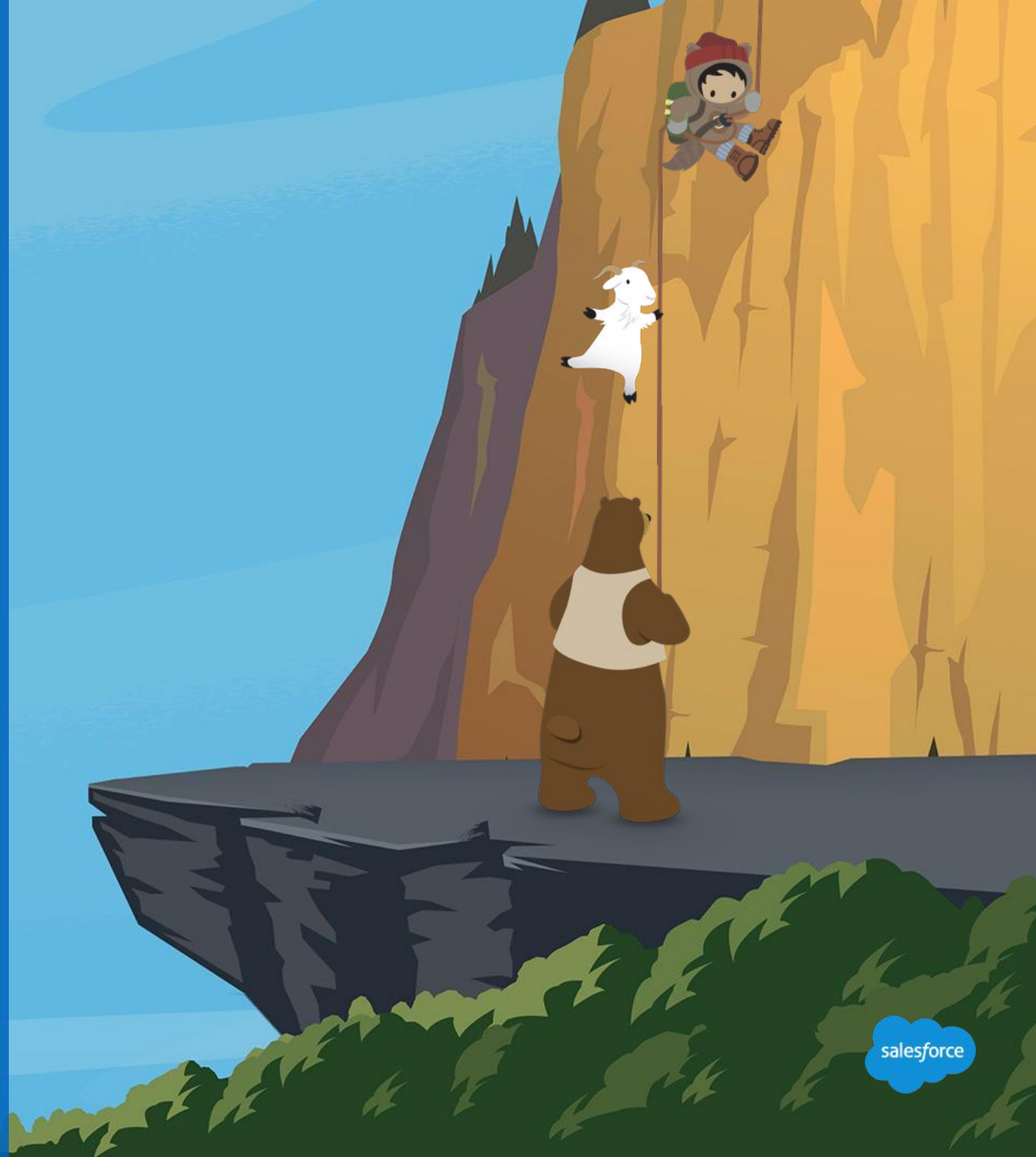
- When a subscriber you import or create already exists in the system.
- When a subscriber appears multiple times on a data extension (helps with deduplication).
- To choose which subscriber record to update when a subscriber accesses their profile or subscription center.
- To choose which subscriber record to unsubscribe when a subscriber clicks an email unsubscribe link.

Establish the Subscriber Key with every data extension created.

If you are using the Marketing Cloud Connect, Lead/Contact ID must be your subscriber key.

Contact Builder

Creating Data Relationships



What Is Contact Builder?

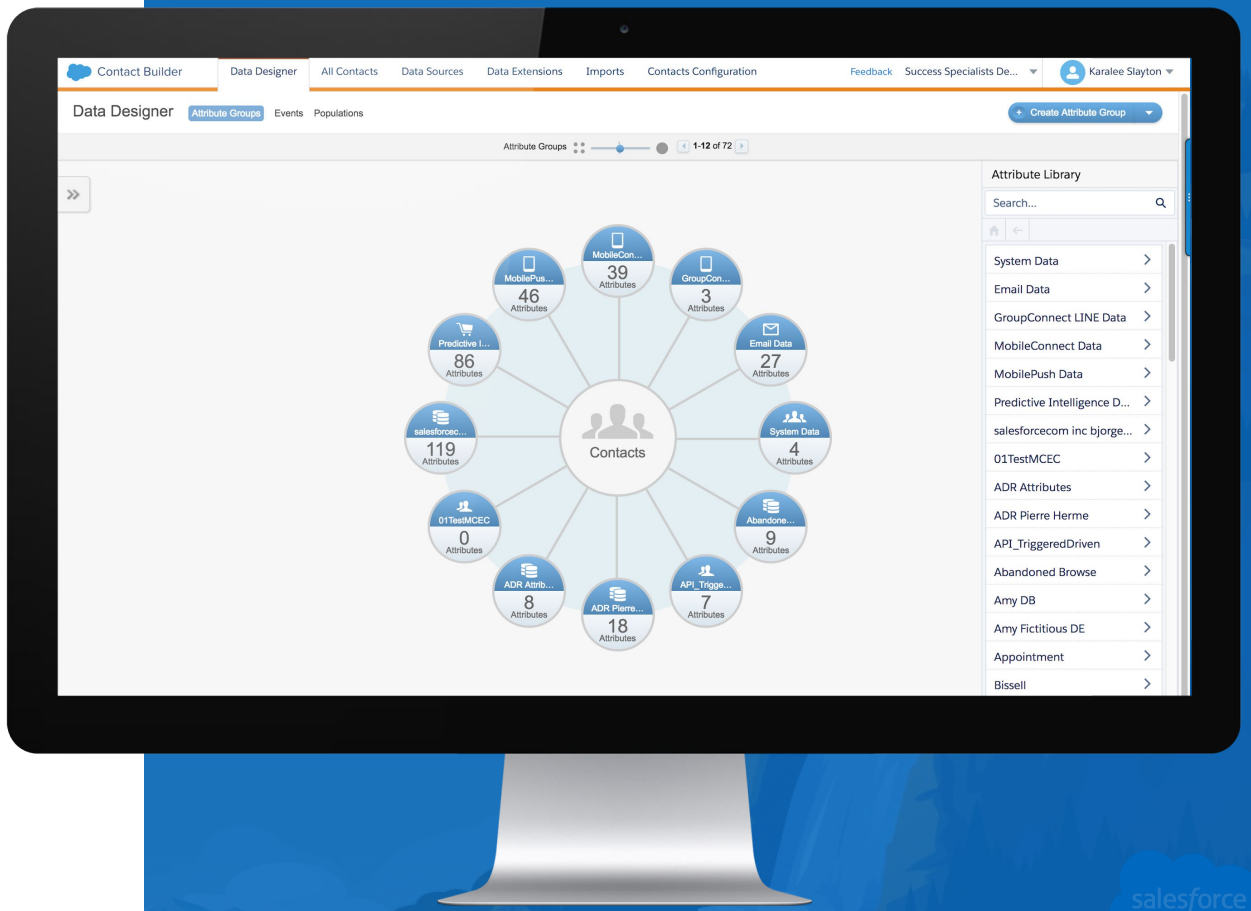
Define, manage, consolidate, organize, and link data to build data relationships

Build a single view of a customer, linking data from all sources, and displaying all of your data collection points:

- Enterprise resource planning (ERP) systems
- Customer relationship management (CRM) systems
- Point-Of-Sale (POS) systems

Data Designer enables you to manage how data extensions store that information, as well as how those data extensions relate to each other. **In Data Designer, you can:**

- Create attribute groups to organize your data.
- View and edit your data model by linking data extensions.

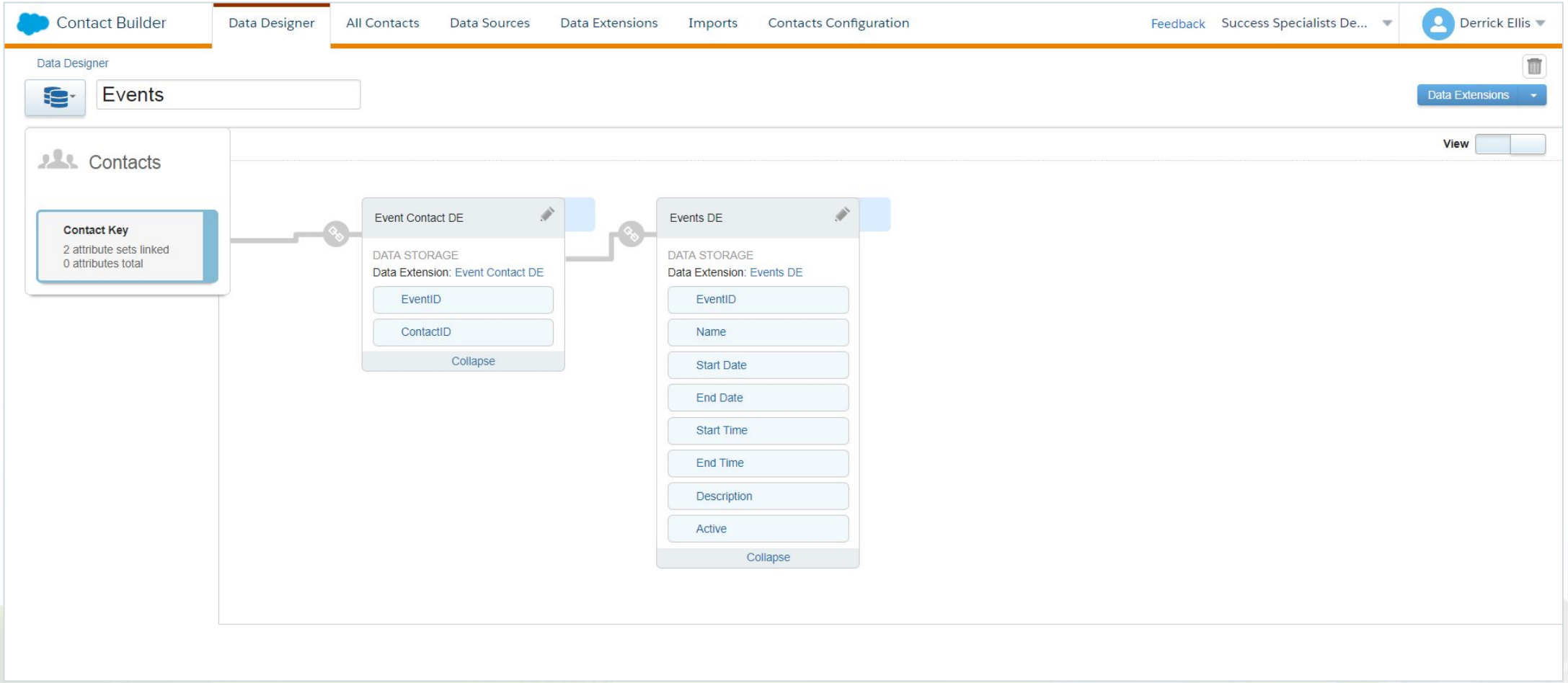


Mobile Studio | Journey Builder | Advertising Studio | Interaction Studio | Audience Builder

Learn more about: Contact Builder and Data Designer

Data Extensions and Contact Builder

Data Extensions are linked to each other AND the Contact from inside of Contact Builder



How are Data Extensions linked to each other?

Data Model 101: Unique Identifiers

Subscriber DE

SubscriberKey	EmailAddress	First_Name	Last_Name	OptInDate	Mobile	Mobile Number
224990833	melvinfamily@gmail.com	Melvin	Haskell	1/05/2018	Yes	12485554600
224990873	melvinfamily@gmail.com	Sherry	Haskell	1/05/2018	No	
224990835	Lamar.medlock@mac.com	Lamar	Medlock	1/06/2018	No	13075557989

Primary Key

Purchase DE

OrderID	CustomerID	SKU	Quantity	UnitPrice	Discount	Subtotal	PurchaseDate
13445	224990833	1019100	1	95.00	0	95.00	10/15/2018
13446	224990833	1054430	1	180.00	20	144.00	10/16/2018
13447	224990835	1113100	1	73.00	0	73.00	10/16/2018

Foreign Key

Subscriber Key (Subscribers) and Contact Key (Contacts)

What's the difference?

The terms are often used interchangeably for convenience but technically there are differences.

Subscriber, Subscriber Key

- Unique identifier for Email Studio.
- Always used when sending from Marketing Cloud.
- When audience comes from a Sendable Data Extension that is not mapped to the Contact model.

Contact, Contact Key

- Purpose is to link all customer data in the Marketing Cloud through a single data model.
- Unique identifier for Contact Builder.
- Always used whenever a Sendable Data Extension has been mapped to the Contact model.
- Used by Journey Builder whenever you want to Update the Contact record.

IMPORTANT NOTE: It is a best practice to **map any subscriber data to the Contact model within Contact Builder prior to any imports**. This will result in the **Subscriber primary key matching the Contact's primary key**. Assuming this configuration, we can use Subscriber and Contact interchangeably when referring to their data.

Contact Builder

Creating Population Relationships and Attribute Groups

A population (root) relationship represents a one-to-one relationship between a contact record and a data extension that acts as a source for contact information.

A root relationship can only take place between the contact record and a single data extension.

Typically you only need one population, but should have no more than three set in your account. Think of this as the master contact table to connect all other data to.

Attribute groups collect several data extensions into a single entity for use in organizing and interacting with contact information.

Each attribute group can contain multiple data extensions and each data extension can include multiple attributes.

You can link data extensions to either the contact record or different data extensions, including data extensions from other attribute groups.

Demonstration: How to Create Data Extensions in Email Studio or Contact Builder

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

DIRECTIONS HOW TO USE THIS SECTION

This Demo section outlines suggested demo.

Feel free to go over slides first and then demo, or just jump directly to the demo. The key here is to let the customer know they will get these slides afterwards with the steps to create data extensions and import data, in the following slides.

Note: Not all customers have Contact Builder, but it is much easier to work with Data Extensions there. So you will be demonstrating creating data extensions in both Email Studio, and in Contact Builder.

Note, we only briefly cover manually importing data in this accelerator, so you might move quickly through that section.... We have another accelerator focused on Automation imports.

Data Extensions

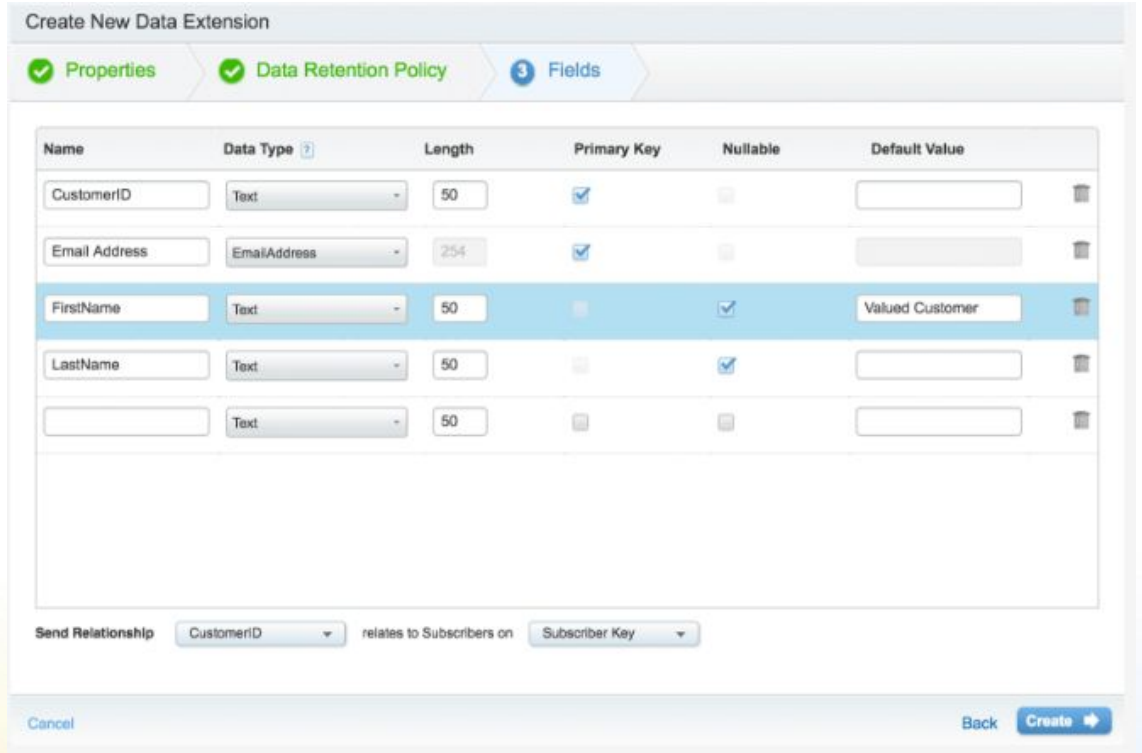
Getting Started Best Practices

Set up your data first:

- List all fields.
- Limit the number of columns to 50.
- Use appropriate data types and lengths.
    - It'll make queries work much better!
- Use only one email address for sendable data extensions.
- Organize your data.

Creating more Data Extensions:

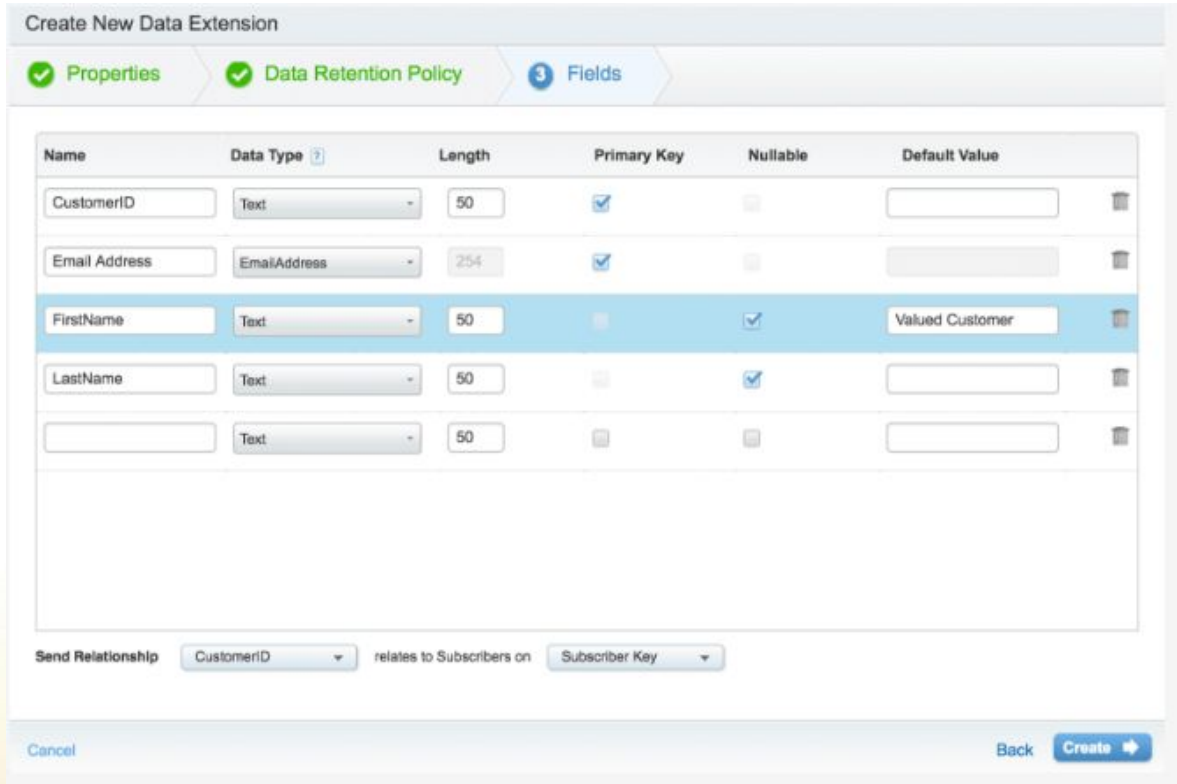
- Copy existing data extensions to copy all fields and settings.
- Leverage data extension templates if commonly reused.
- Must set data types for email address and other applicable fields.



Data Extension: Field Settings

Best Practices

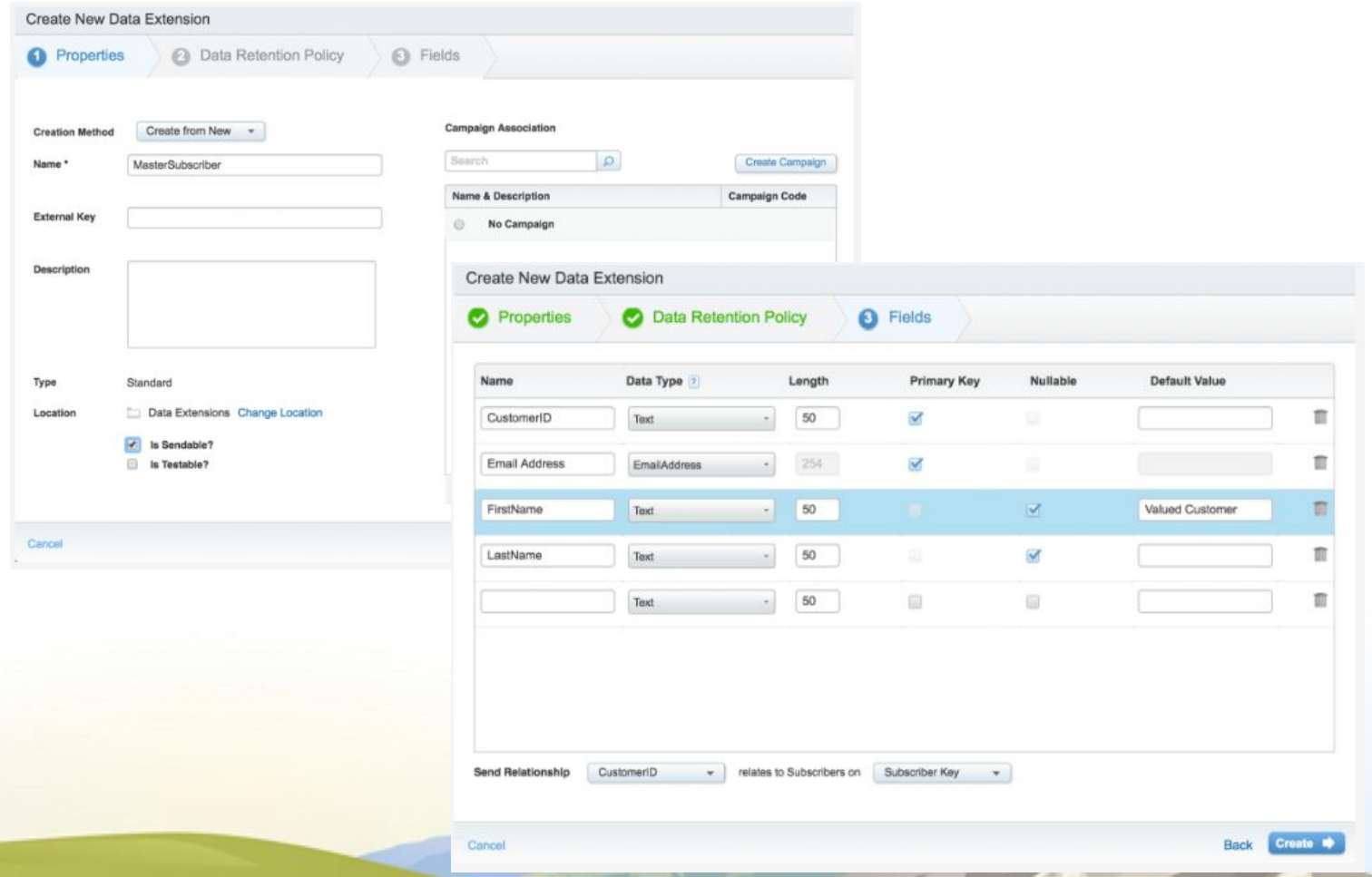
- **Data Type**
  - Cannot be changed after creation
- **Length**
  - Shorten as much as possible
- **Primary Key**
  - Must be unique
- **Nullable**
  - Will not import a row without the value
- **Default Value**
  - Populates this value instead of blank in personalization



Data Extension: General Settings

Best Practices

- **Subscriber Key**
  - Subscriber ID/Key equals FIELD.
  - Allows you to set the relationship at every data extension.
- **Sendable**
  - Requires email address field type.
- **Testable**
  - Used sparingly.

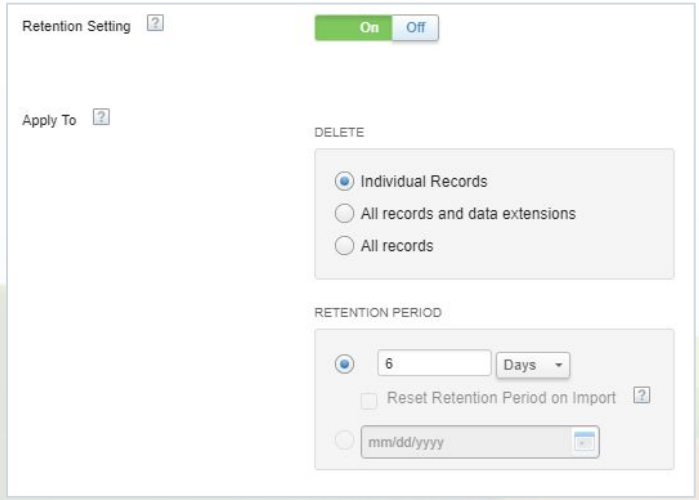


Data Extensions: Data Management

What options do you have to manage the data in your Data Extensions?

By Retention Setting

- **On**: Ensures all records in the Data Extension are deleted at the same time.



Delete

- **Individual Records**: Keep the Data Extension but delete specific records within it.
- **All Records**: The Data Extension is retained but the records inside the Data Extension are deleted.
- **All Records and Data Extension**: Deletes the entire Data Extension and the records within it.

By Retention Period

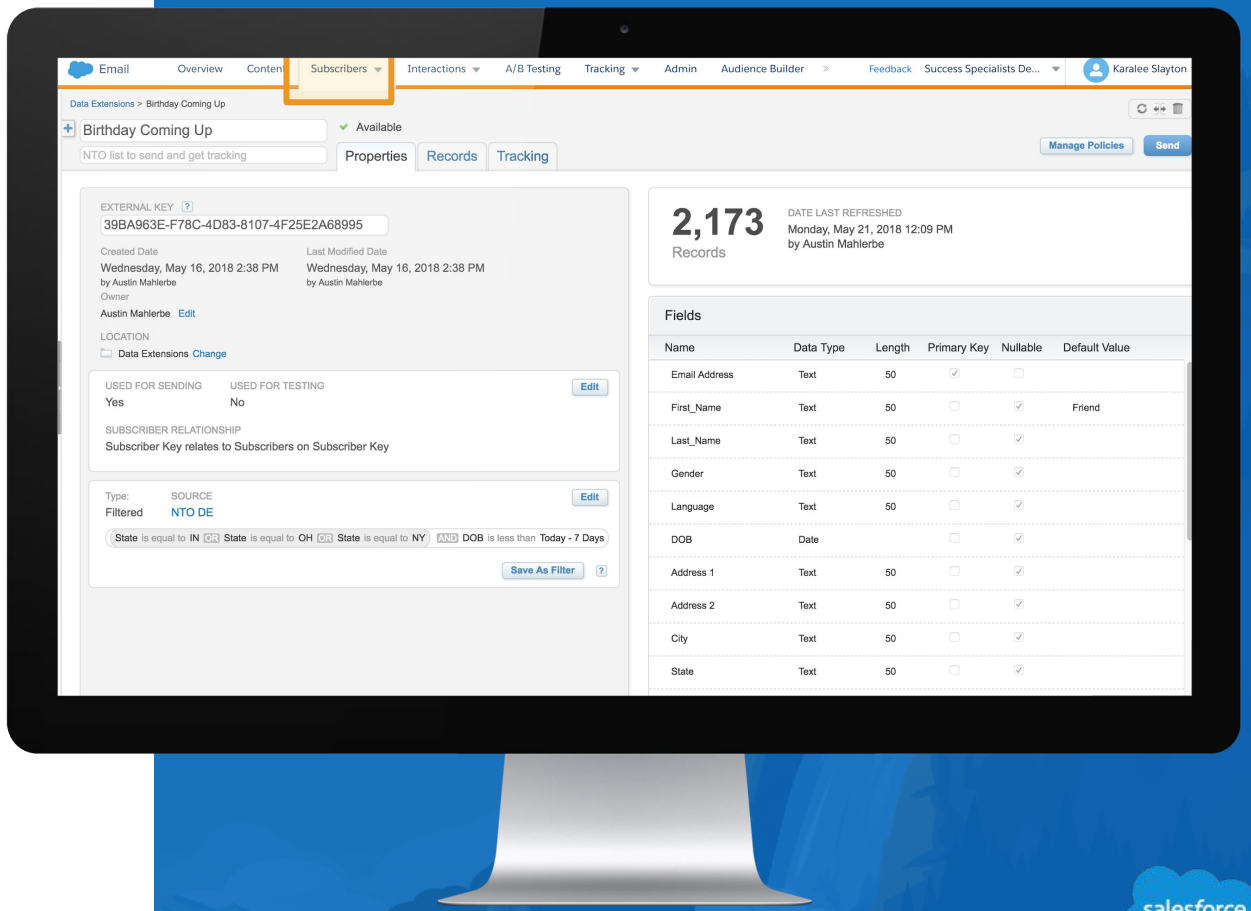
- **After**: Enter the number of days after the Data Extension was created to wait before deleting.
- **Reset period on import**: Check this box to extend the retention date following a new import to the Data Extension.
- **On**: Select a specific date to delete.

Email Studio: Create a Data Extension

Create a container for your Data

Recommended Process:

1. In Marketing Cloud, navigate to **Email Studio** and hover over **Subscribers** and click **Data Extensions.**
2. Click **Create**.
3. Select **Standard Data Extension**.
4. Click **Next**.
5. Select **Create from New**.
6. Enter a **Name.**
7. Move it to a folder if desired and check **Is Sendable**.
8. Click **Next**.
9. Configure **Retention Settings** if needed.
10. Click **Next.**
11. Using desired file columns and values: Enter each field **Name, Data Type, Length**, whether it is a **primary key** or **nullable** along with any **default value.**
12. Associate the Send Relationship between your **Customer ID** field and **Subscriber Key.**
13. Click **Create.**



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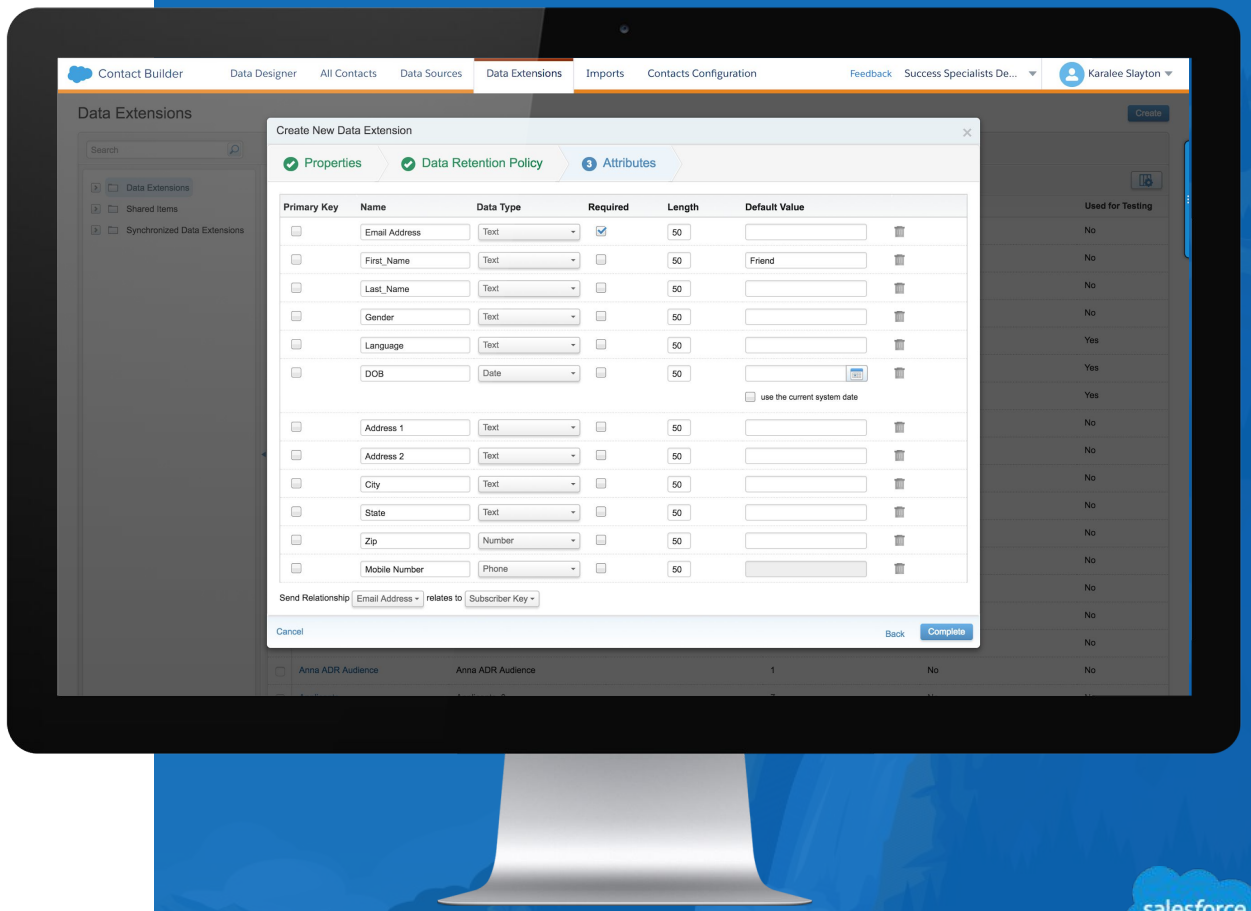
Contact Builder: Create a Data Extension

Create a container for your data

Recommended Process:

1. In Marketing Cloud, hover over Audience Builder and click **Contact Builder.**
2. Click **Data Extensions.**
3. Click **Create**.
4. Select **Create from New**.
   a. Enter a **Name.**
   b. Move it to a folder if desired and check **Is Sendable.**
   c. Click **Next.**
5. Configure **Retention Settings** if needed.
6. Click **Next.**
7. Using desired file columns and values: Enter each field **Name, Data Type, Length**, whether it is a **primary key** or **nullable** along with any **default value.**
8. Associate the Send Relationship between your **Customer ID** field and **Subscriber Key.**
9. Click **Create.**



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Add or Import Subscribers

Populate data extensions when you add or import subscribers

Use subscriber data for segmentation and dynamic content in messages:

Create as many data extensions as you need to segment your subscribers.

There are a number of different ways to add subscribers to Marketing Cloud:

- Use the subscriber import wizard or an import activity in Automation Studio.
- Create a subscriber manually.
- Capture subscriber information with a Smart Capture form.

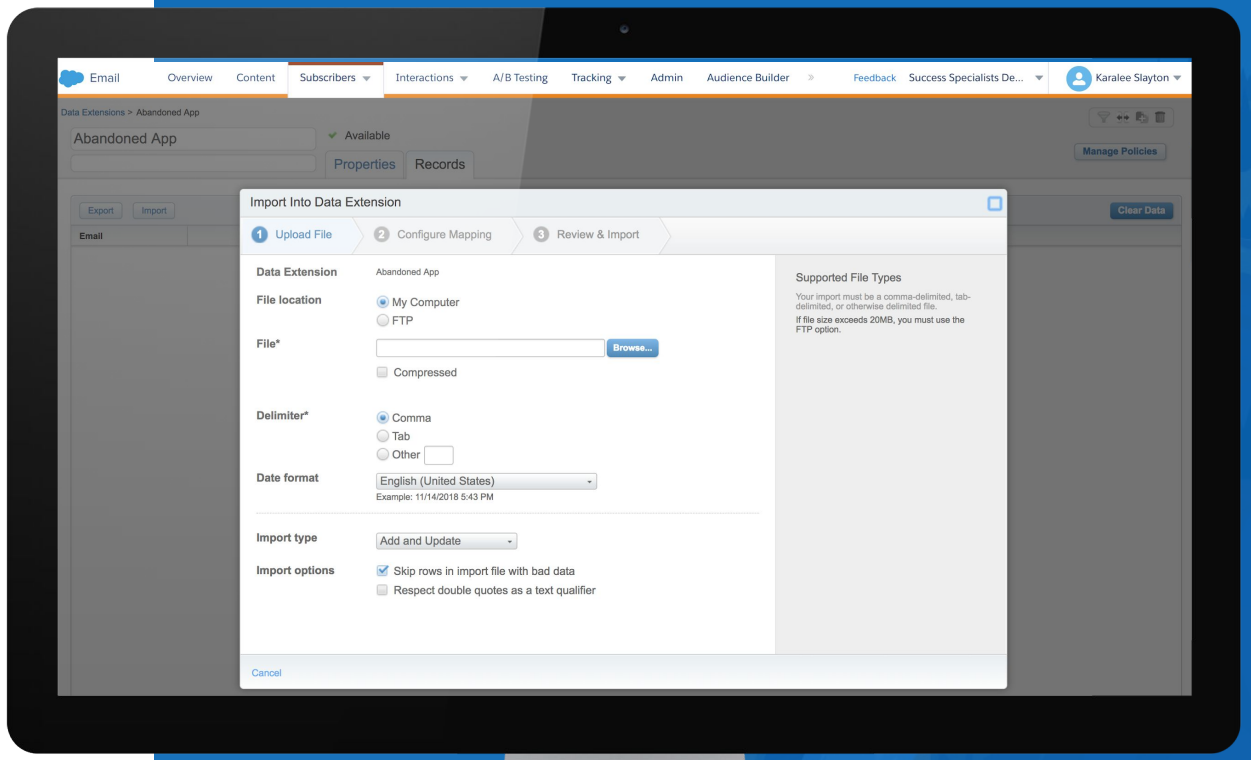
Use data filters to further segment subscribers.

Email Studio: Import into a Data Extension

One-time import into a Data Extension

Recommended Process:

1. In **Email Studio**, click **Subscribers** → **Data Extensions**, then click on the Data Extension that we created previously.
2. Click on the **Records tab** then click **Import.**
3. Browse for the file on your computer, set the file type and the import type and click **Next**.
4. Follow the same exercise for mapping as before–use header row if the file matches, ordinal if the file's data column order matches the field order in the Data Extension and manual mapping if you need to make custom selections; then click **Next.**
5. Set a notification email, review your settings and click **Import.**



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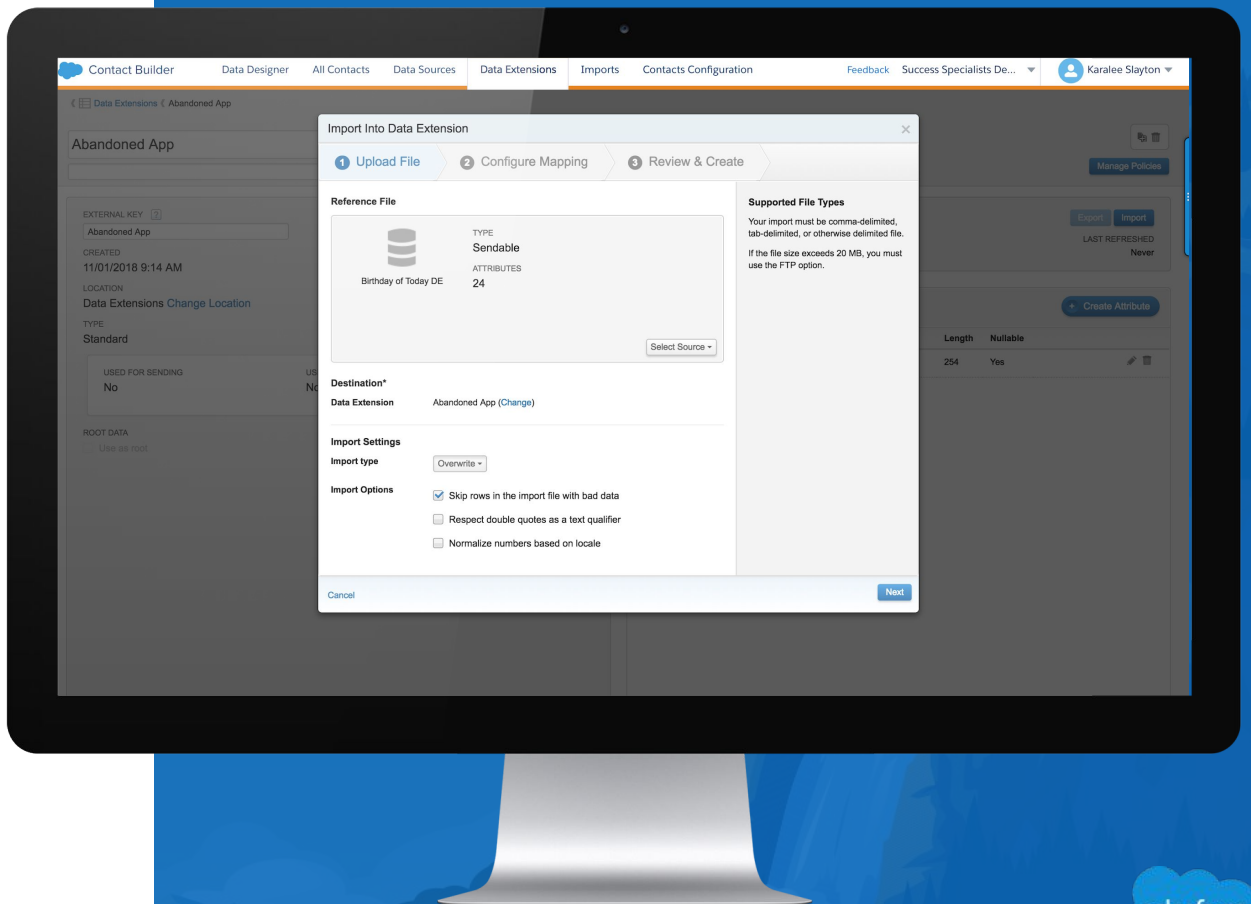
Contact Builder: Import into a Data Extension

One-time import into a Data Extension

Recommended Process:

1. In **Contact Builder**, click **Data Extensions**, then click on the Data Extension that we created previously, then click **Import.**
2. Select **Import into Data Extension** and click **OK.**
3. Browse for the file on your computer or choose a source, set the **import type** and click **Next.**
4. Follow the same exercise for mapping as before–use header row if the file matches, ordinal if the file's data column order matches the field order in the DE and manual mapping if you need to make custom selections; then click **Next.**
5. Set a **notification email**, review your settings and click **Finish.**



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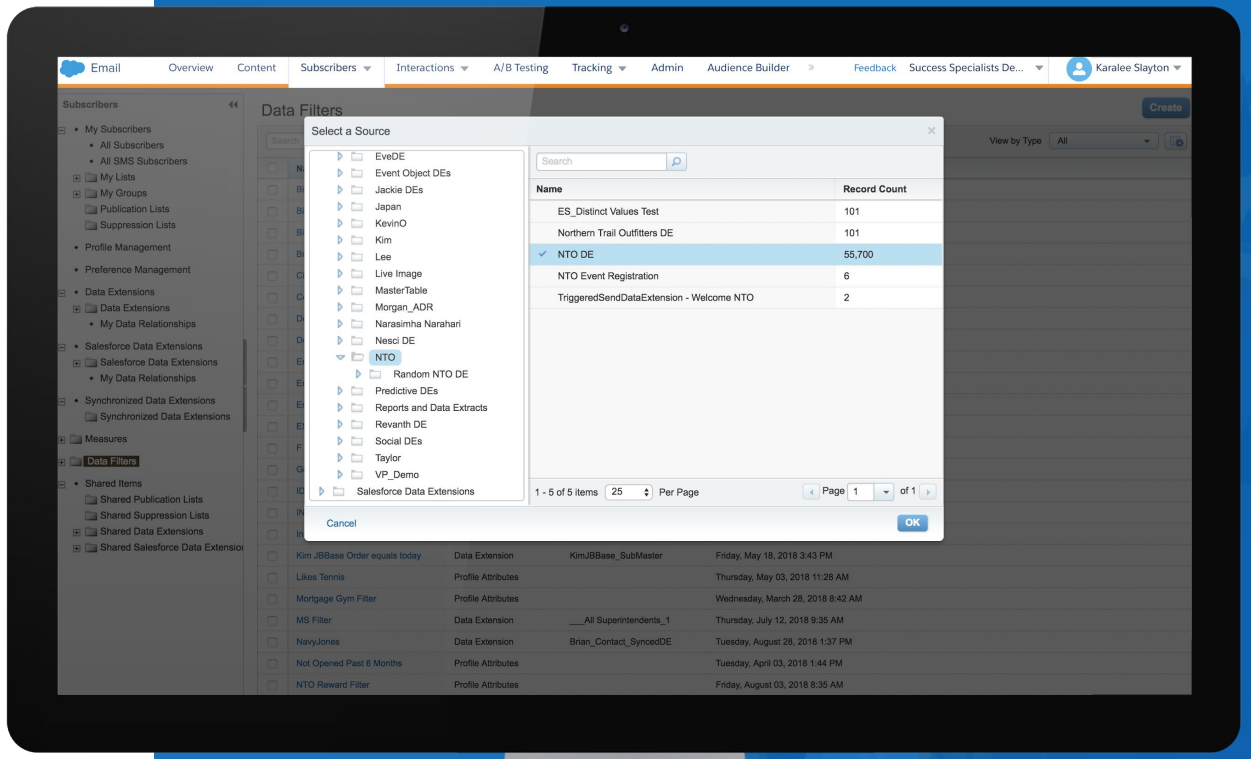
Linking Data Extensions in Email Studio

Create Data Relationships in Email Studio

Relate two data extensions to be used in a data filter.

Recommended Process:

1. In **Email Studio**, click **Subscribers → Data Relationships.**
2. Click **Create.**
3. Complete the information in the properties section: **Name, External Key, Description.**
4. Complete the information in the fields section: **Select left item**- Identifies the data extensions involved in the data relationship.
5. **Select right item**- Identifies the fields in the data extensions that are involved in the relationship.
6. If more than one column in each data extension is involved, click **Add** to display another set of **select field** list boxes.
7. Click **Save.**



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Building Relational Data

Create Data Relationships in Contact Builder

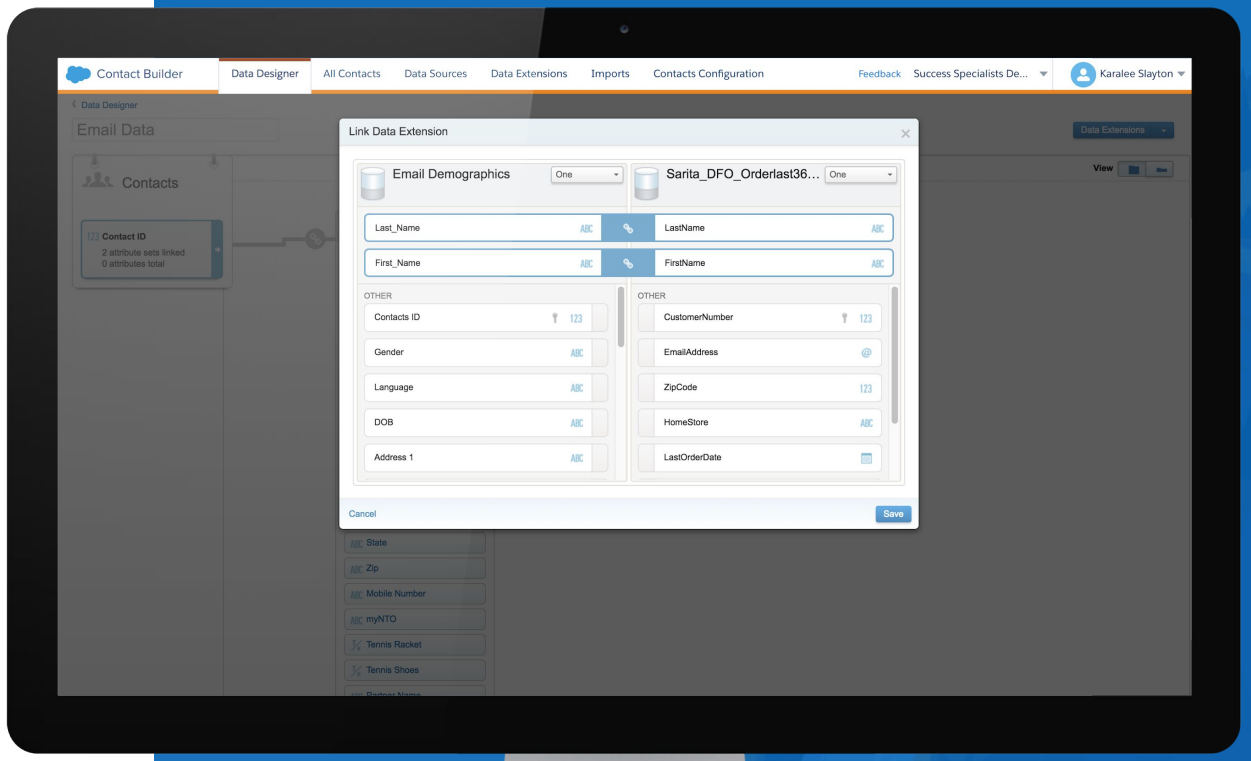
Modeling data in Contact Builder exposes data extension data to the email Data Filter's drag-and-drop user interface:

Populations

- Create a new attribute group.
- Link Contact key to data extension.
- Linking contact key to population (root).

Relationships

- Link Data Extensions.
- Edit Data Extension relationships.



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Data Extension

Best Practices

For master data extensions

- Use Add/Update instead of leaving contact-enabled master data extensions blank.
- Upload new or updated records by using a delta data process instead of full overwrites for master data extensions like “gold data” or data of record.
- Avoid multiple queries running on the same data extension.

For data uploads

- Use a delta data process to upload new and updated records every night.

Data extension columns

- Limit the number of columns in tables. If you have over 50 columns, review what’s actually needed.
- Use the appropriate data type and length.
- Limit use of text fields that contain over 100 characters.
- Use only one email data type column in a table for sendable subscribers.

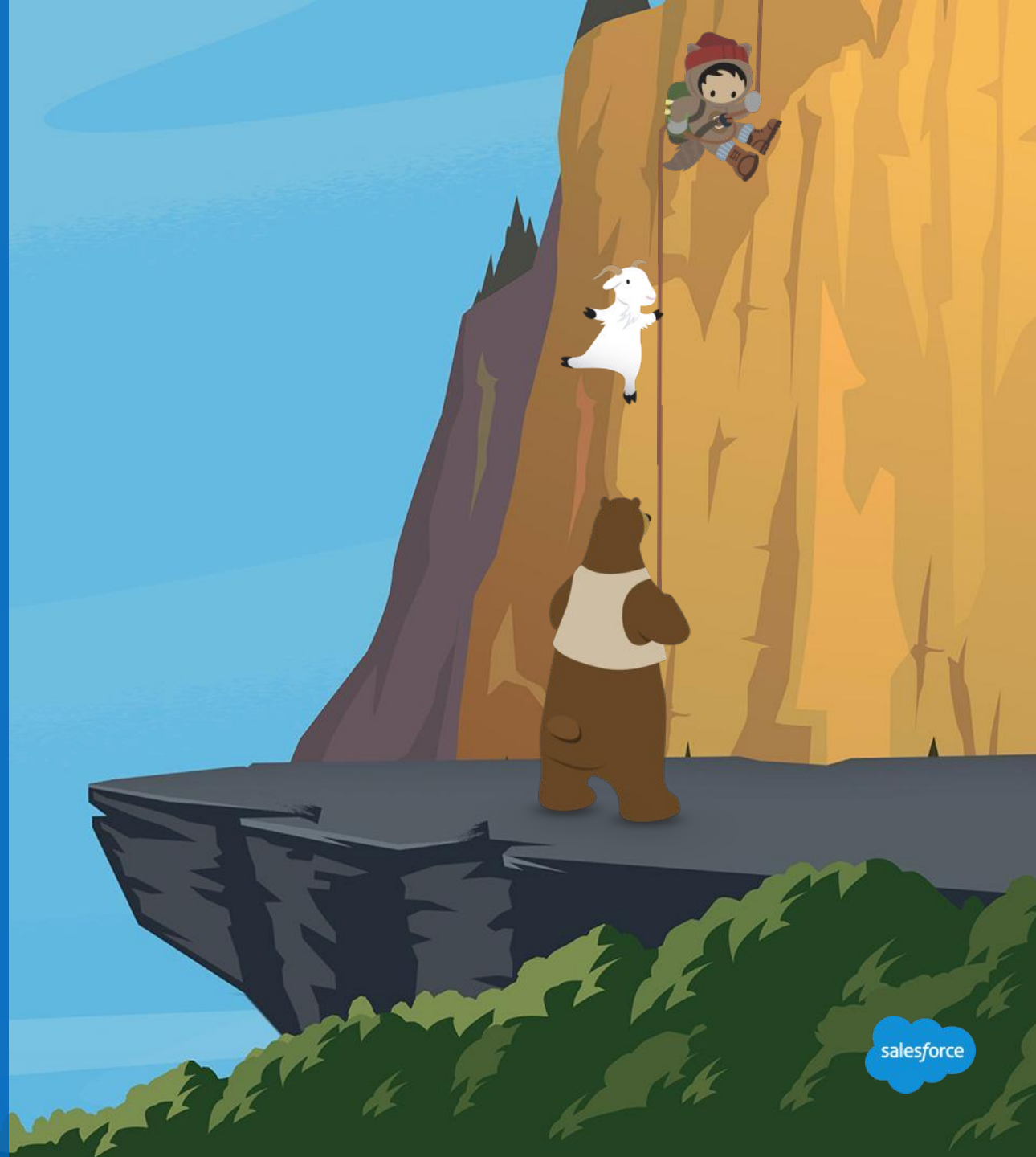
Subscriber Key

Best Practices

Email addresses	For Marketing Cloud Connect	For external data (subscribers who are not coming through MC Connect)
• If you have a unique identifier that's not an email address, assign it before bringing data into the Marketing Cloud. • If you're using an email address in Unicode, we recommend that you use TEXT (254) for the subscriber key. • Use an email address ONLY if you don't have a subscriber key.	• Always include the 18-digit Contact ID or Lead ID for the subscriber key in data sets or reports. • Minimize importing data directly into Marketing Cloud.	• Use query activities to resolve any duplicates before further segmentation.

Understanding Segmentation and Data Filters

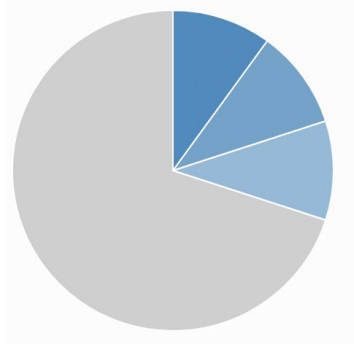
Drag and Drop Segmentation in Email Studio



What is Segmentation

Segmentation in Marketing Cloud

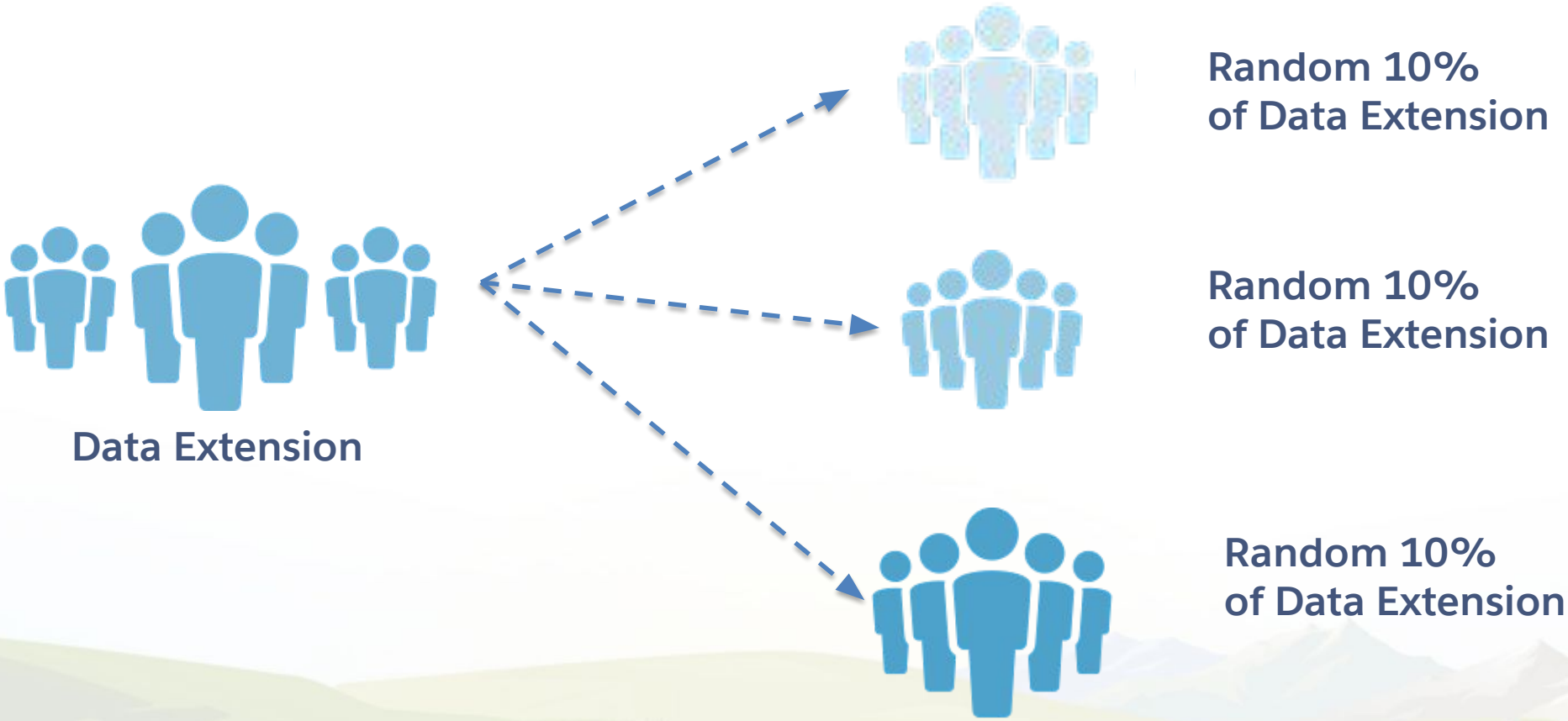
1. Random Splits - Division into segments or parts.



2. Filters applied to a **data extension** in order to create targeted buckets of contacts.

What is Segmentation

Random Splits



Data Filters

Data Extension

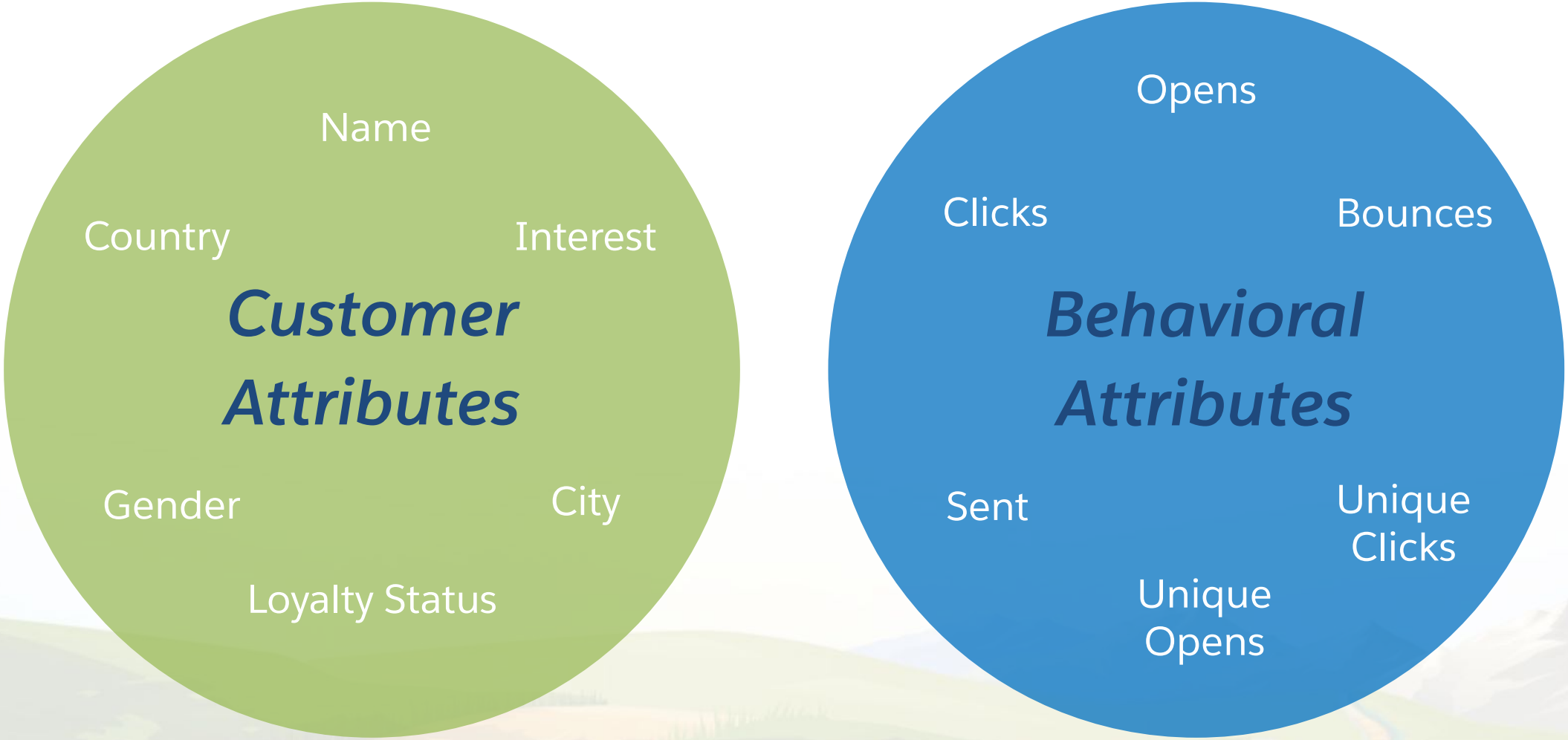
If
Gender = Male
and
Sport = Hiking
Or
Sport = Running

Apply Filter

Data Extension
is Segmented

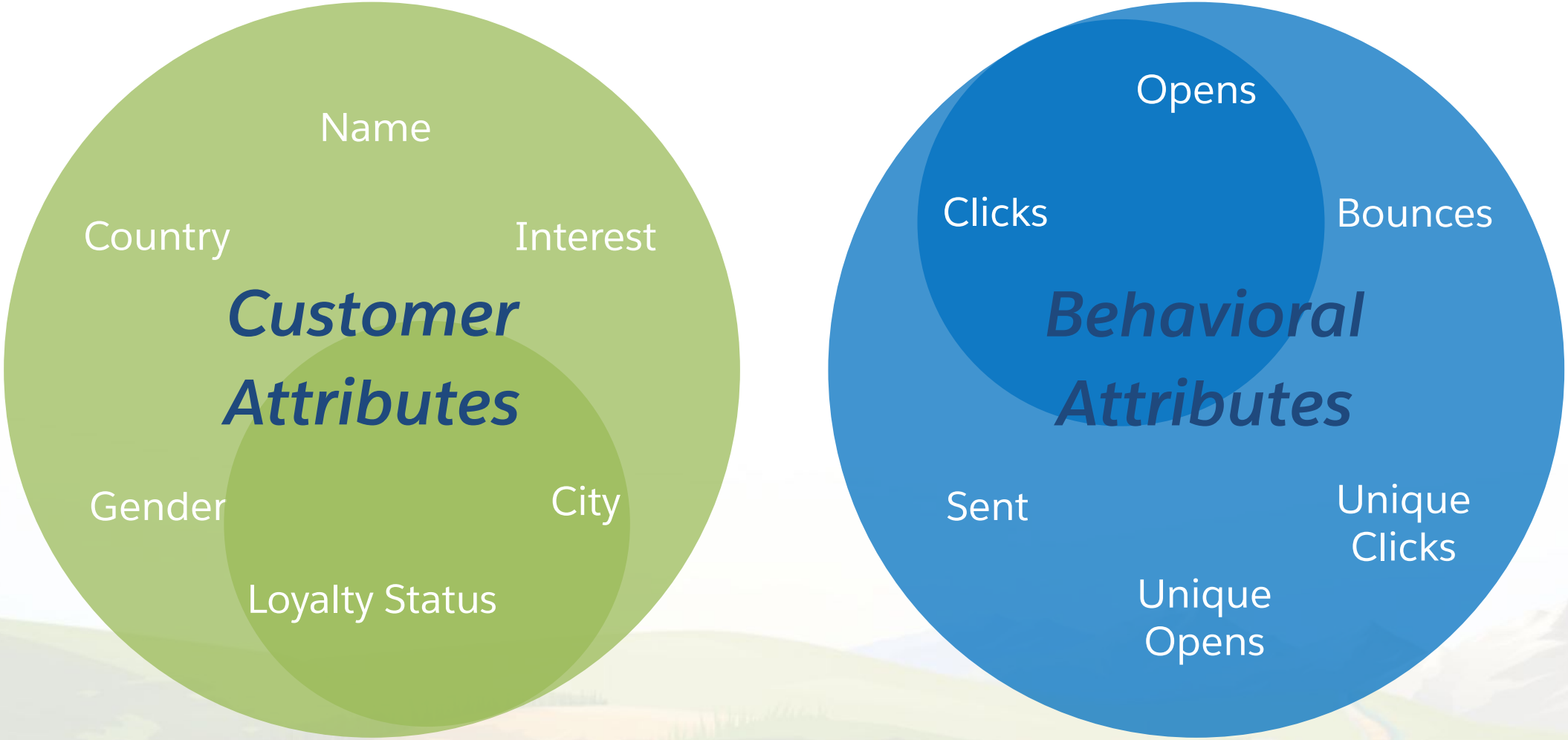
What is Segmentation

Subscriber data can be made up of different types of attributes



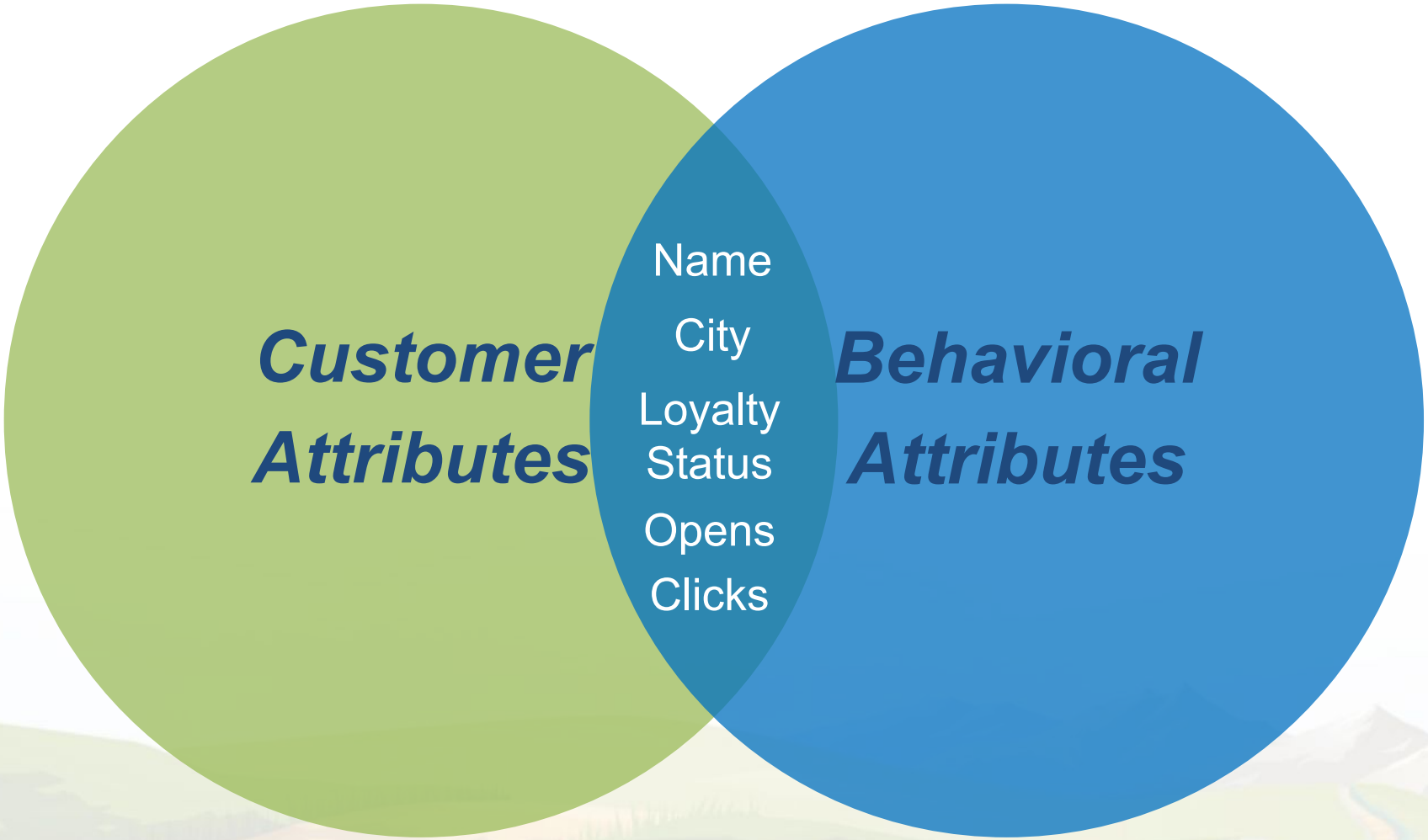
What is Segmentation

Simple Filters to target specific people



What is Segmentation

Joining data based on both profile and behavioral attributes



What is Segmentation

Common ways marketers segment subscriber data

Interests - What have your subscribers indicated as their interests when filling out their profile?

Behavior - What are they viewing or clicking?

Purchase History - What did they recently buy?
What have they left in their shopping carts?

Point-of-Sale - Are they buying in the store, online or both?

Communication Preferences - Do they prefer email, social media, mobile messaging, ads or some combination thereof?

Subscriber Status - Are they a new subscriber?
Are they consistently viewing and buying?
Have they become inactive recently or been inactive for a long time?

Gender – Which gender is more active?

Age – What age or age range is most active?

Geographic Location – What location or group of locations do you want to target?

Previous email interactions - clicks, opens, timing of interactions, etc.

Basic Email Segmentation

Data Filter Definition

Create filters with a drag & drop builder

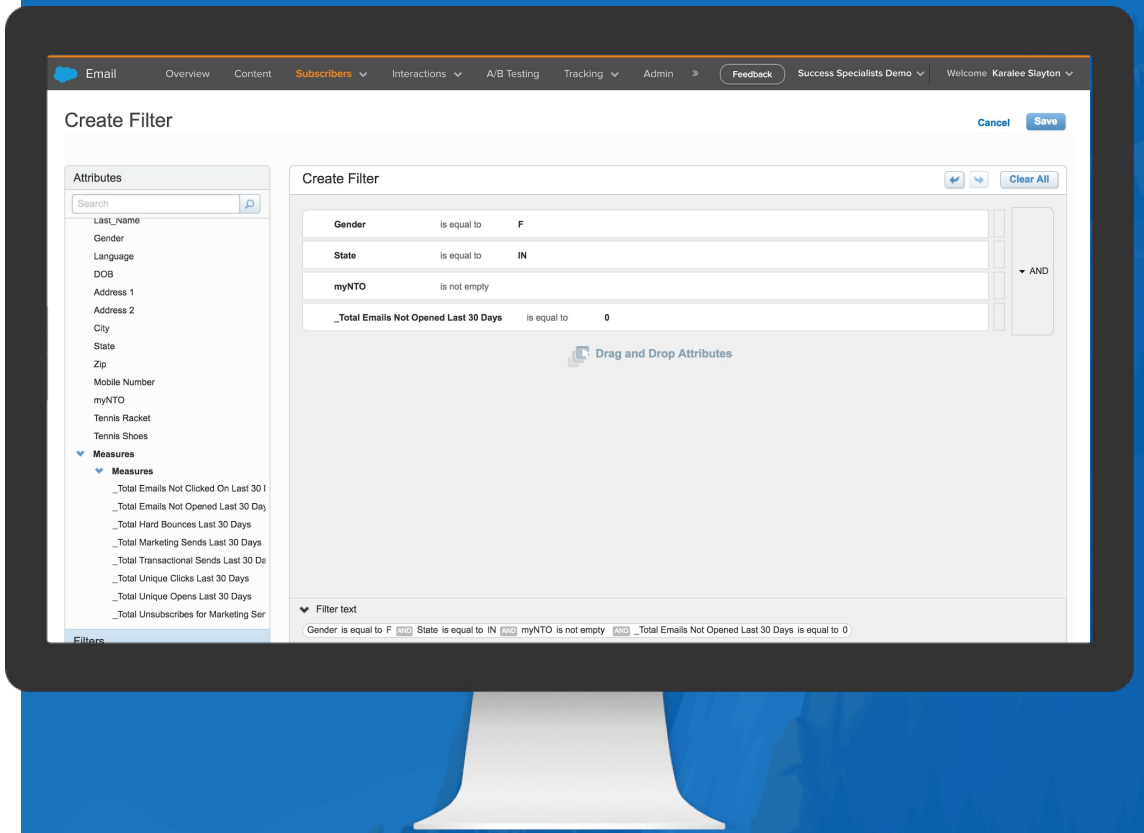
Build filters using an intuitive drag-and-drop interface. Drive more relevant emails without the need to code in SQL.

Target your email to specific subscribers

Create a standalone filter definition and reuse the same filter definition by creating different filter activities that use the same data filter in Email Studio.

- **Segment build is based on ONE data extension at-a-time.**

- **Available to all customers as part of Email Studio.**

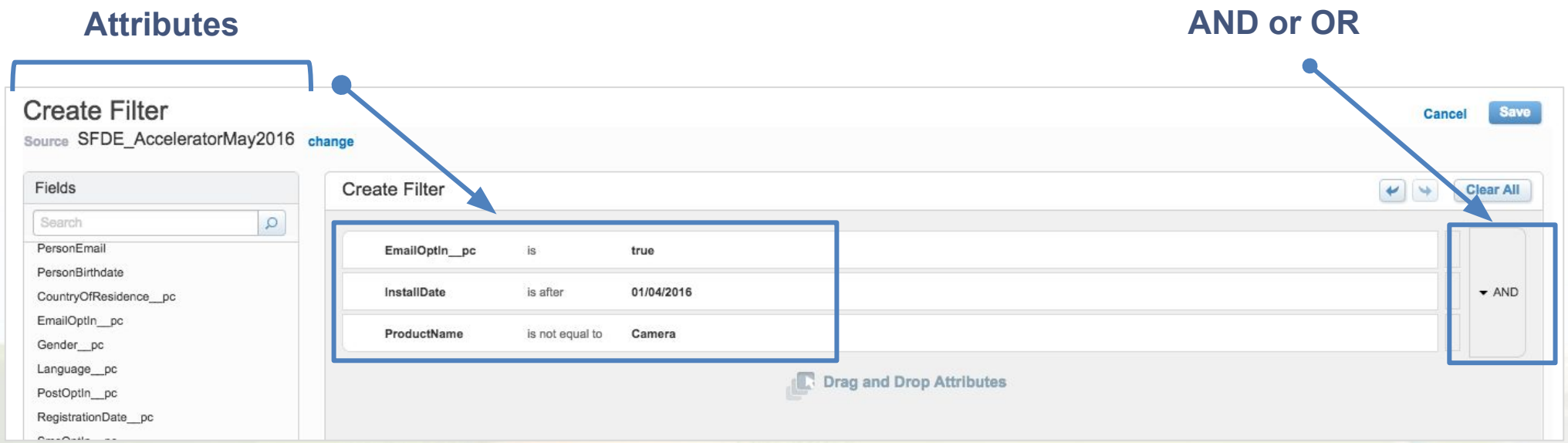


Elements of Data Filters

A data filter will segment your audience in a data extension, according to the criteria you set.

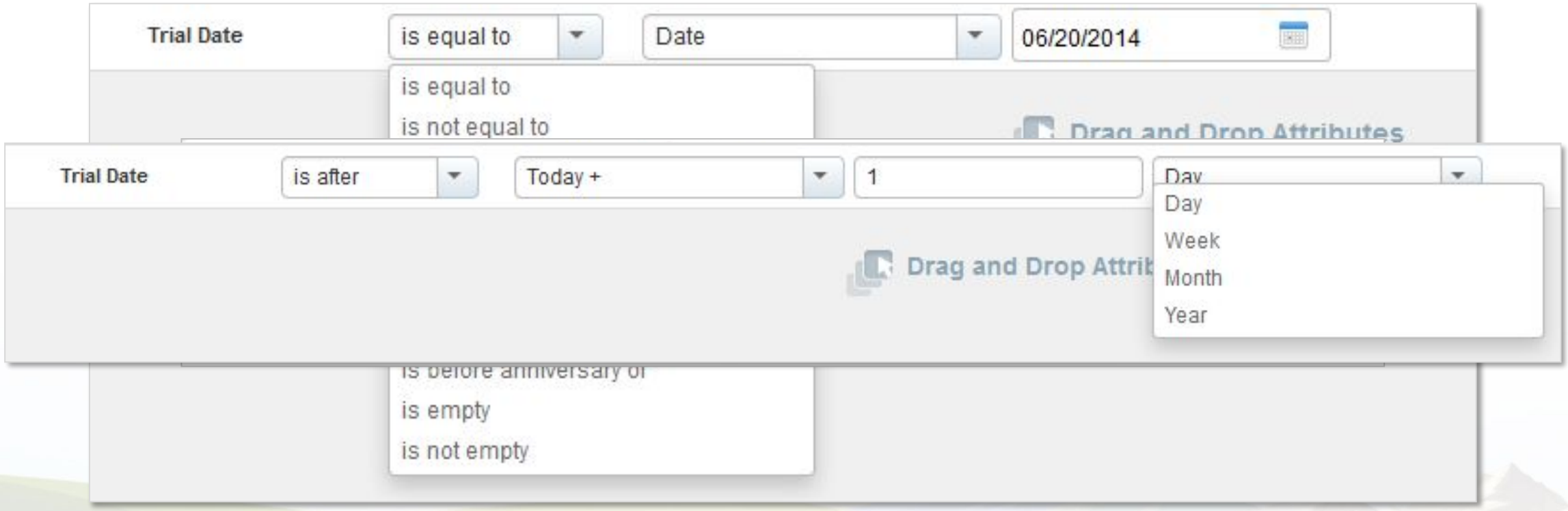
To create your filter criteria you will select the Field, the Operator to compare values and the value to compare against

Example: [Email Opt-in (is) True] AND [Install Date (is after) 01/04/2016 AND Product Name (is not equal to) Camera]
This says segment to those who opted in, and installed an app after 01/04/2016 but have anything but a camera.

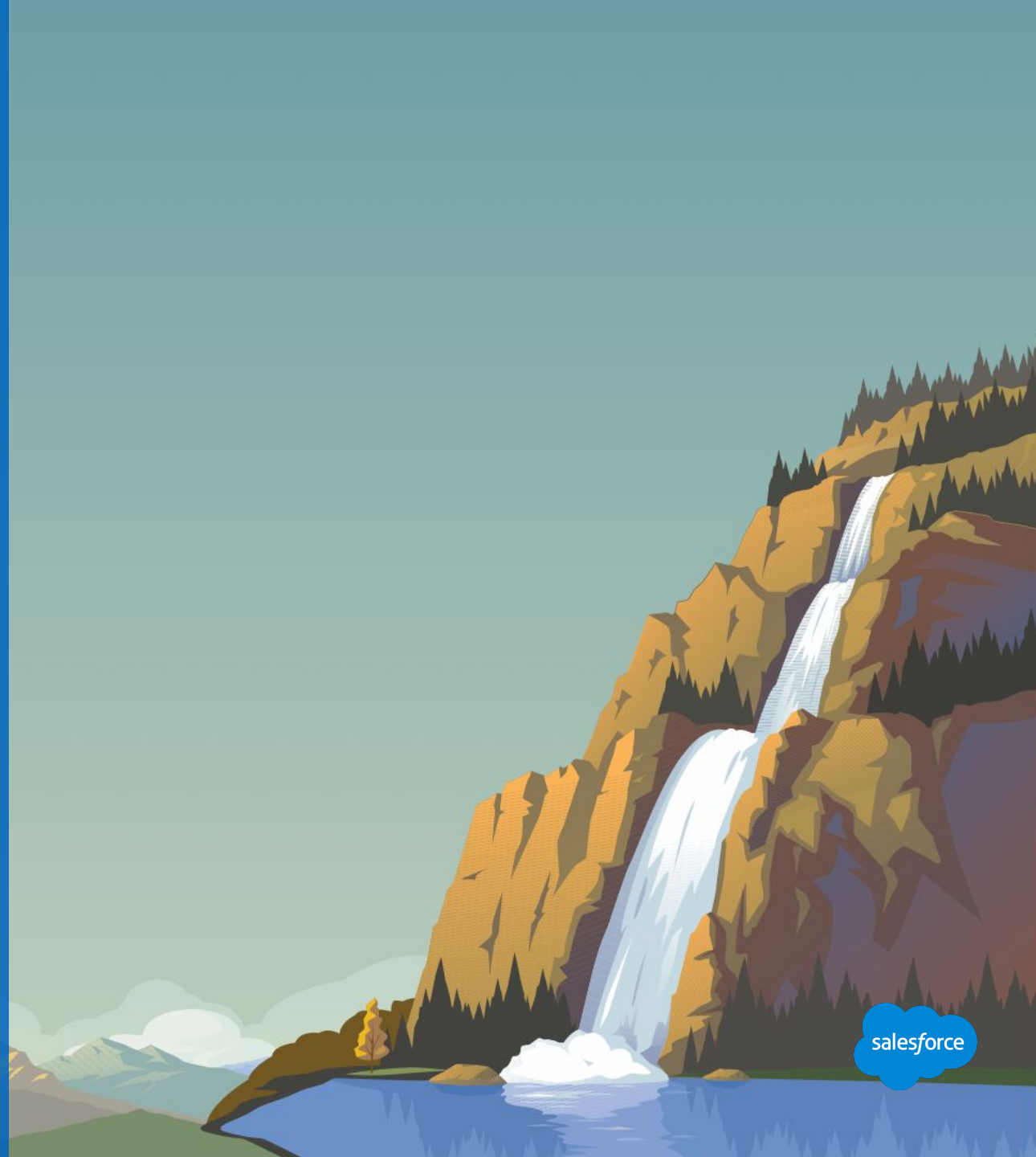


Filter Operators

Date Attribute



Demonstration - How to use Data Filters to Segment Your Data



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

DIRECTIONS HOW TO USE THIS SECTION

This Demo section outlines suggested demo.

Feel free to go over slides first and then demo, or just jump directly to the demo. The key here is to let the customer know they will get these slides afterwards with the steps to create data filters, in the following slides.

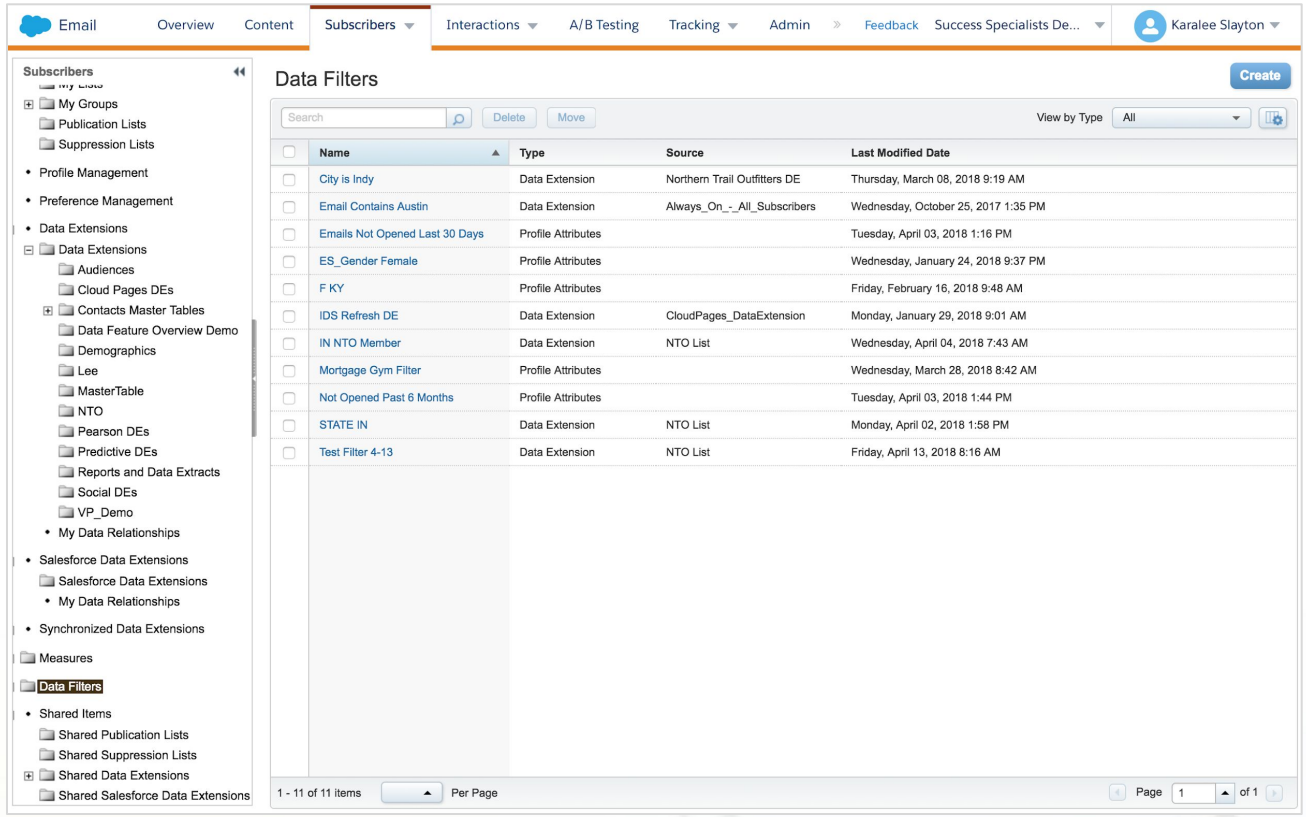
Creating a Filter Definition in Email Studio

Walk with Me

Let's create a Filter Definition

Recommended Process:

1. Select your **Source Data Extension** or navigate to Data Filters and **Create**.
2. Create a **Data Filter**.
3. **Select Attributes** to segment.
4. **Select Operators** (AND or OR).
5. **Save Filter.**

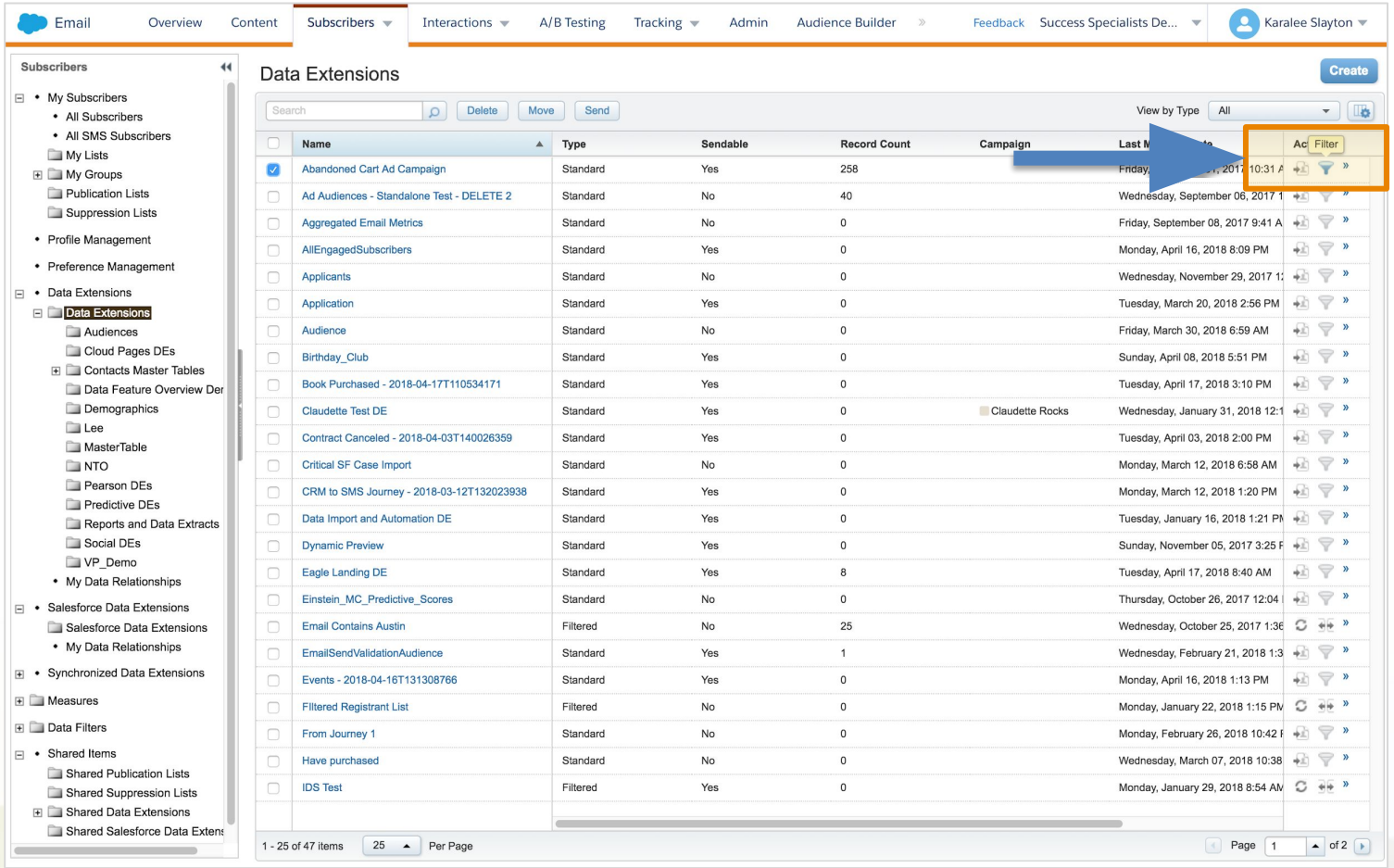


Walk with Me

Filtering an Individual DE

Creating a Filtered Data Extension

1. In Marketing Cloud, navigate to **Email Studio** and Hover over **Subscribers** and click **Data Extensions.**
2. Click the **Funnel** icon in the "Actions" column of the Data Extension that you want to use as a Data Filter Source. *(If you don't see Actions column, then Click open the Data Extension and locate this icon in the top right corner).*
3. Configure your **Criteria**, then click **Save as Filter**.
4. You'll be prompted to **create a new Data Extension**.
   Provide **Name**, **Description**, **Location** and **Save.**

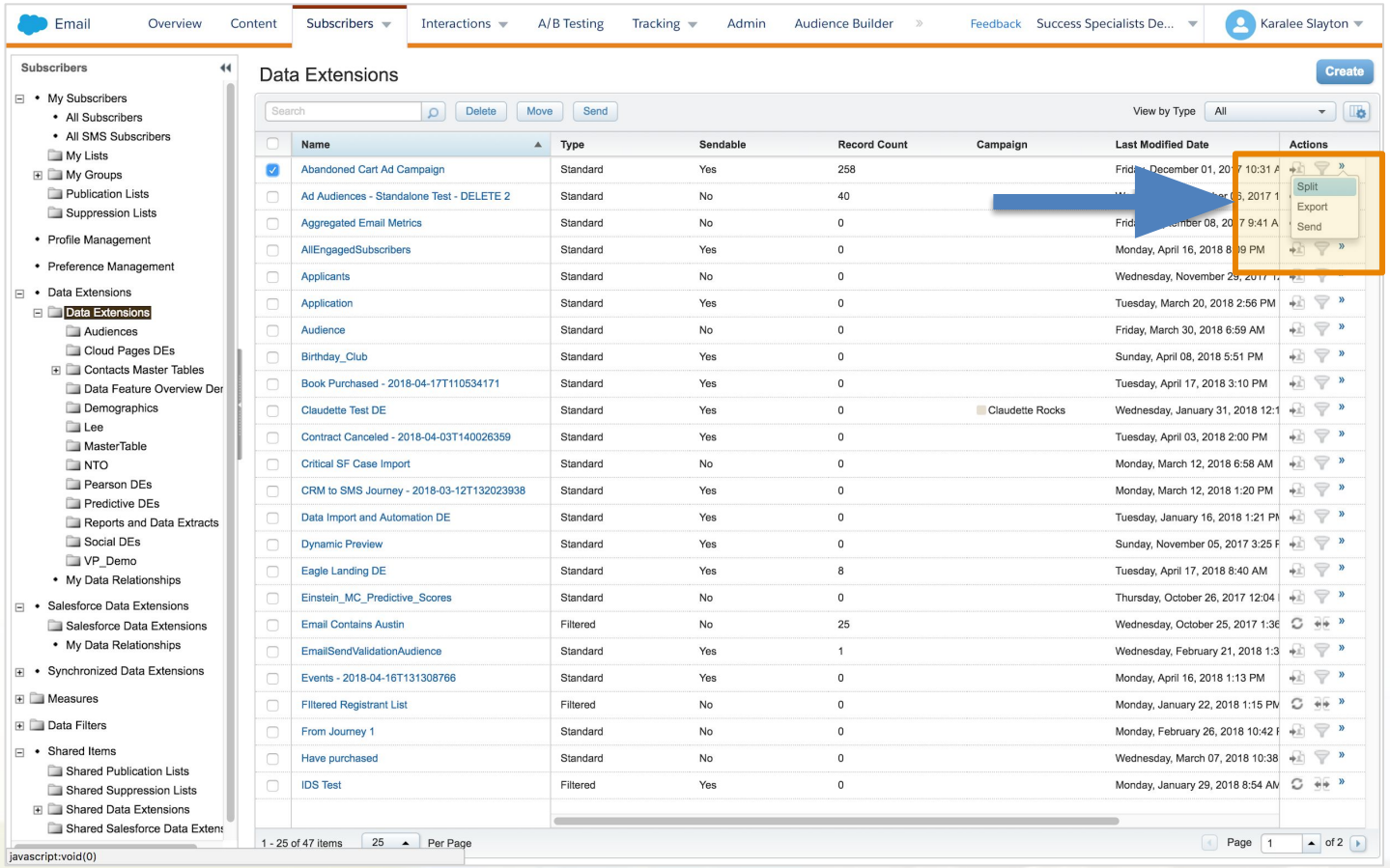


Filtering an Individual DE

Create a Random Data Extension

Walk with Me

1. In Marketing Cloud, navigate to **Email Studio** and hover over **Subscribers** and click **Data Extensions.**
2. Click the **select list carrot** in the "Actions" column of the Data Extension that you want to use as a Data Filter Source.
   (If you don't see Actions column, then Click open the Data Extension and locate this icon in the top right corner.)
3. Configure your **Criteria**, then click **Save as Filter**.
4. You'll be prompted to **create a new Data Extension**.
   Provide **Name**, **Description**, **Location** and **Save.**

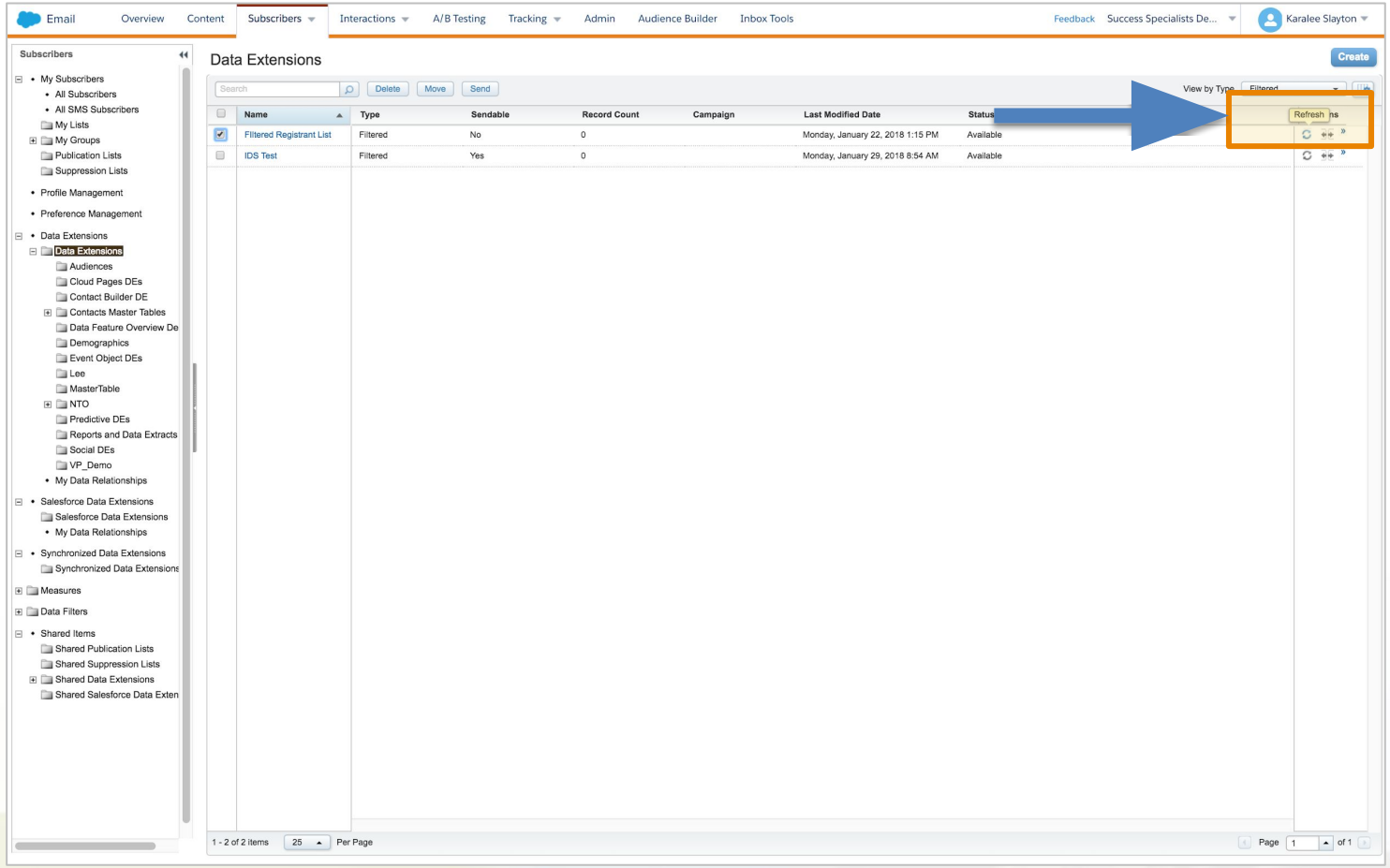


Filtering an Individual DE

Refresh a Filtered Data Extension

Newly added or modified records are not automatically added to filtered data extensions.

1. In Marketing Cloud, navigate to **Email Studio** and hover over **Subscribers** and click **Filtered Data Extensions.**
2. Select the **checkbox** next to the filtered data extension to refresh.
3. Click **Refresh** under Actions.
4. Click **OK** in the confirmation dialog box that appears. The application scans all records data and rebuilds the filtered data extension.



Walk with Me

Filter Definition

Best practices for creating your filter definition

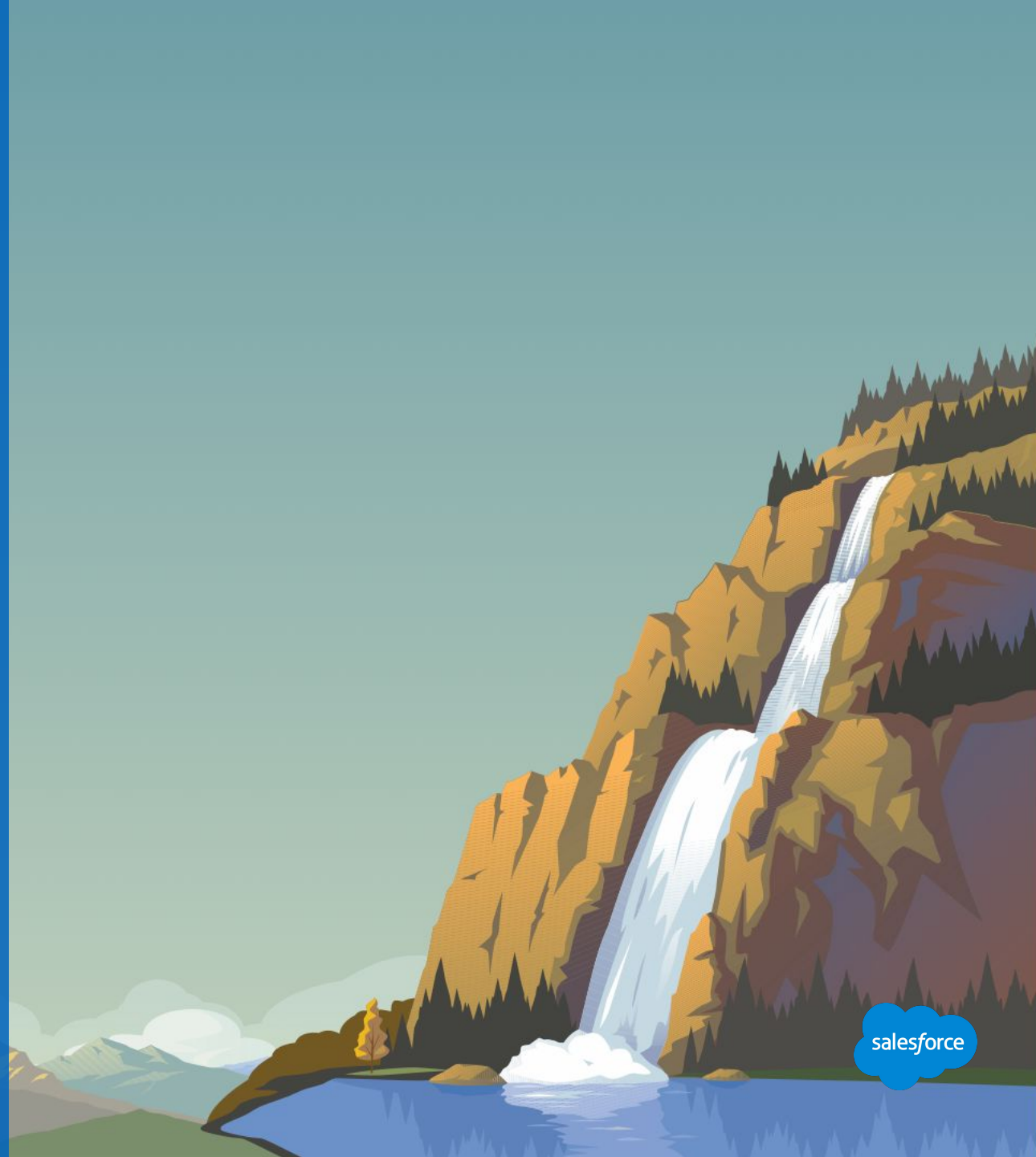
Tips and Tricks
Be sure to choose an operator that makes sense with the type of attribute you chose. For example, do not use the less than the operator with a text attribute. For attributes with type equal to date, only the following operators are supported: is equal to, is not equal to, is greater than and is less than.
If you choose AND, the subscriber must meet all criteria to be included in the group.
If you choose OR, the subscriber must meet one of the criteria, but not all criteria, in order to be included in the group.

Our Recommendations

Segmentation Best Practices

Tips for Success
• Data – Take stock of your data: what you have, is it accessible, is it updated?
• Good data in = accurate segments and more relevant messages. Make sure your data is clean, clear and easy to find. To do this, frequently scrub your subscribers, relational data and content for relevancy and implement naming conventions for data extensions, folders, content, etc. that provide structure and consistency across your account or business unit.
• You cannot include the following characters in the name and field name of a data extension: ! @ # $ % ^ * ( ) = { } [ ] \ .<>/ " : ? | , _&
• Always align to your initial campaign goal. • Ask - “does my segmentation / personalization approach support my goal?”

Data Best Practices



Data Best Practices

General Guidelines

- Make sure your data is clean, clear, and easy to find.
- Frequently remove data that is incorrect, incomplete, improperly formatted, or duplicated.
- Implement naming conventions
  - For data extensions, folders, and content to provide structure and consistency across your account or business unit.
  - Organize your data–either by campaign, publication type, date, frequency, or some combination thereof.
  - Always use _ instead of a space in a name.
  - Name your external key the same as your data extension name.

Contacts and Data Extension

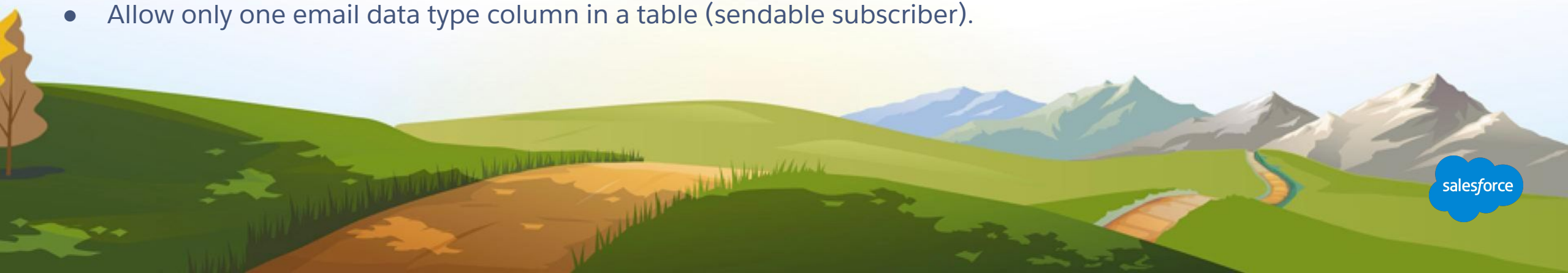
Re-emphasizing Some Best Practices

Contacts:

- With Contacts enabled, make sure that master data extensions are not blank (use Add or Update).
- Use a delta data process to upload new or updated records nightly, instead of doing full overwrites for master data extensions (for example, “gold data” or data of record).
- At the same time, avoid multiple imports running in the same table, importing an API record updates, and running multiple queries on the same data extension.

Data extension columns:

- Limit number of columns on tables for performance (if you have over 50 columns, you’ll need to review).
- Use the proper data type and length (limit use of text fields over 100 characters).
- Allow only one email data type column in a table (sendable subscriber).



Resources and Next Steps

Contact Builder

Resources

Overview

Get a single view of a customer that displays all interactions with your brand. You can use all collected information to personalize customer conversations at any size in any channel.

A single view of the customer can contain the mobile number necessary to send:

- SMS messages through MobileConnect
- The email address to send email messages through Email Studio
- The mobile device identification used for sending push messages through MobilePush

All of the associated addresses, subscription, and tracking information associated with activities and journeys relate back to that single contact record.

Resources

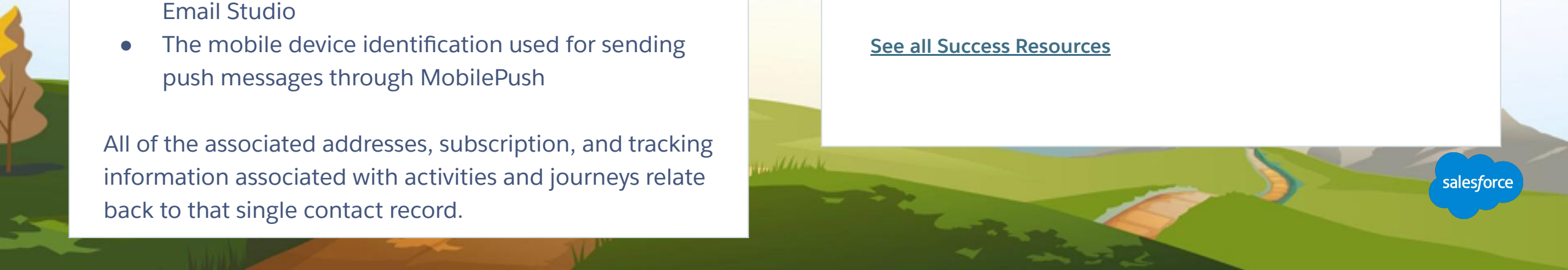
Documentation:

- Get Started with Contact Builder
- Integration with Contact Builder
- Contact Builder Best Practices
- Audiences

Webinar:

Marketing Cloud Expert Hour for Premier Customers

See all Success Resources



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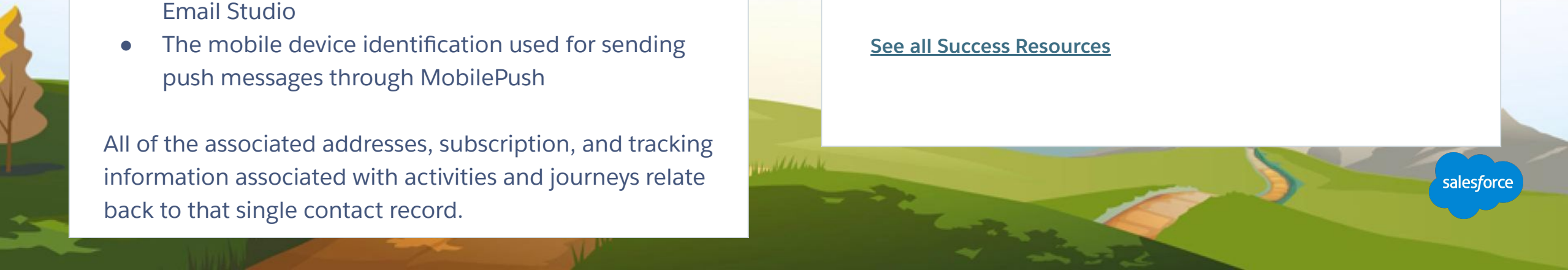


Next Steps

Where to go from here

1. Join the Salesforce Marketing Cloud Trailblazer Community
2. Take the Marketing Cloud Trailmix 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

Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators & 1:1 follow up		✓
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]

Requirements for 1:1 Follow Up Session

Must be a Premier customer

All set?

You can request your 1:1 Follow-Up with a Salesforce Success Specialist through survey you will receive after this webinar concludes.

Resource requirements

- <Participation of your Business (Marketing Analyst/Manager) tasked to deliver targeted engagements.>
- Time commitment of 90 minutes.

Technical requirements

- <Einstein Engagement Scoring is activated and Scores are available in your org.>
- <If you have not yet activated Engagement Scores but have at least 90 days of email engagement data.>
- <1:1 session is not a good fit, if your Org has enabled Field Level Encryption, Contact Data Encryption, Tokenized Send Caveats.>

salesforce

Premier+ Customers

Premier Configuration Services

Included with Premier Success Plan, helps keep your instance of Marketing Cloud up to date by adjusting system configurations as your marketing programs and use cases expand.

CONFIGURATION CATEGORIES/TASKS	DESCRIPTION OF CONFIGURATION TASKS
Business Units	Create business units within a parent account
Sender Profiles	Create sender profiles to assign to send definitions
Data Extensions	Create data extensions with fields and data types to facilitate sending or data storage
Lists	Create lists to facilitate sending
Groups	Create groups by segmenting a list
Headers and Footers	Extract the header and footer content assigned to an account to enable customer review/modification2
Delivery Profiles	Provide methods to manage headers and footers via delivery profiles
Account Settings	Review account settings within Administration to ensure proper configuration and customize settings as needed
Roles	Create roles and assign enabled permissions as requested
Send Logs	Create send log data extensions with additional fields as needed
Send Classifications	Create and configure send classifications with specific sender/delivery profiles
User	Create a user to access the Marketing Cloud
Reports	Create a standard report from the report catalog
Tracking Extract	Create an automation that pulls tracking data for a specific time frame or rolling date range
Automating a Report	Automate the delivery of a report from the report catalog
Data Extract	Create an automation to extract data from a data extension
Creating a Report	Reports Create a standard report from the report catalog

Upcoming Webinars

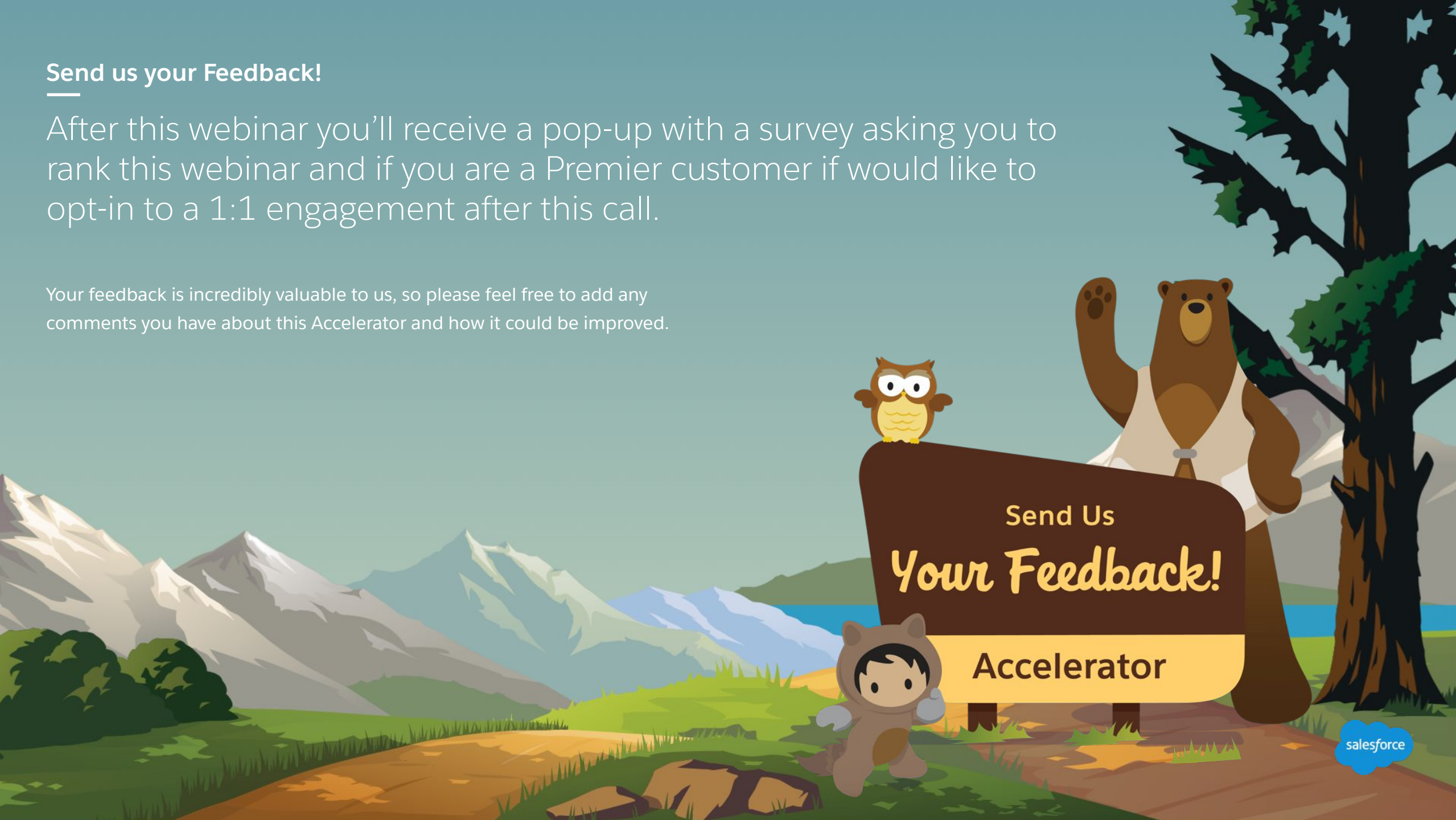
Marketing Cloud Events

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.

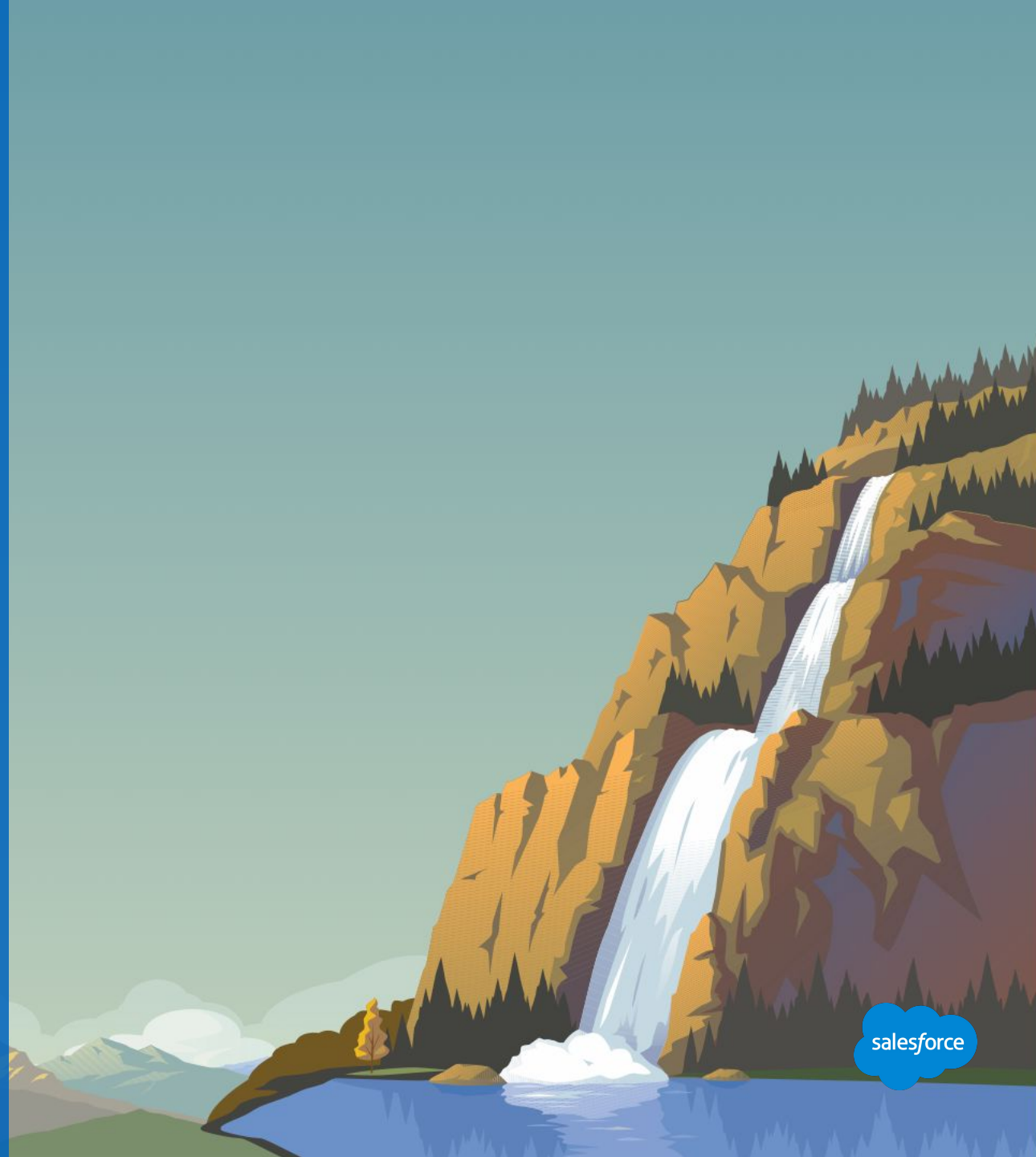
Your feedback is incredibly valuable to us, so please feel free to add any comments you have about this Accelerator and how it could be improved.



Thank you

Appendix MISC

Other things to know



All Subscribers

System of record for Email Subscriber Status

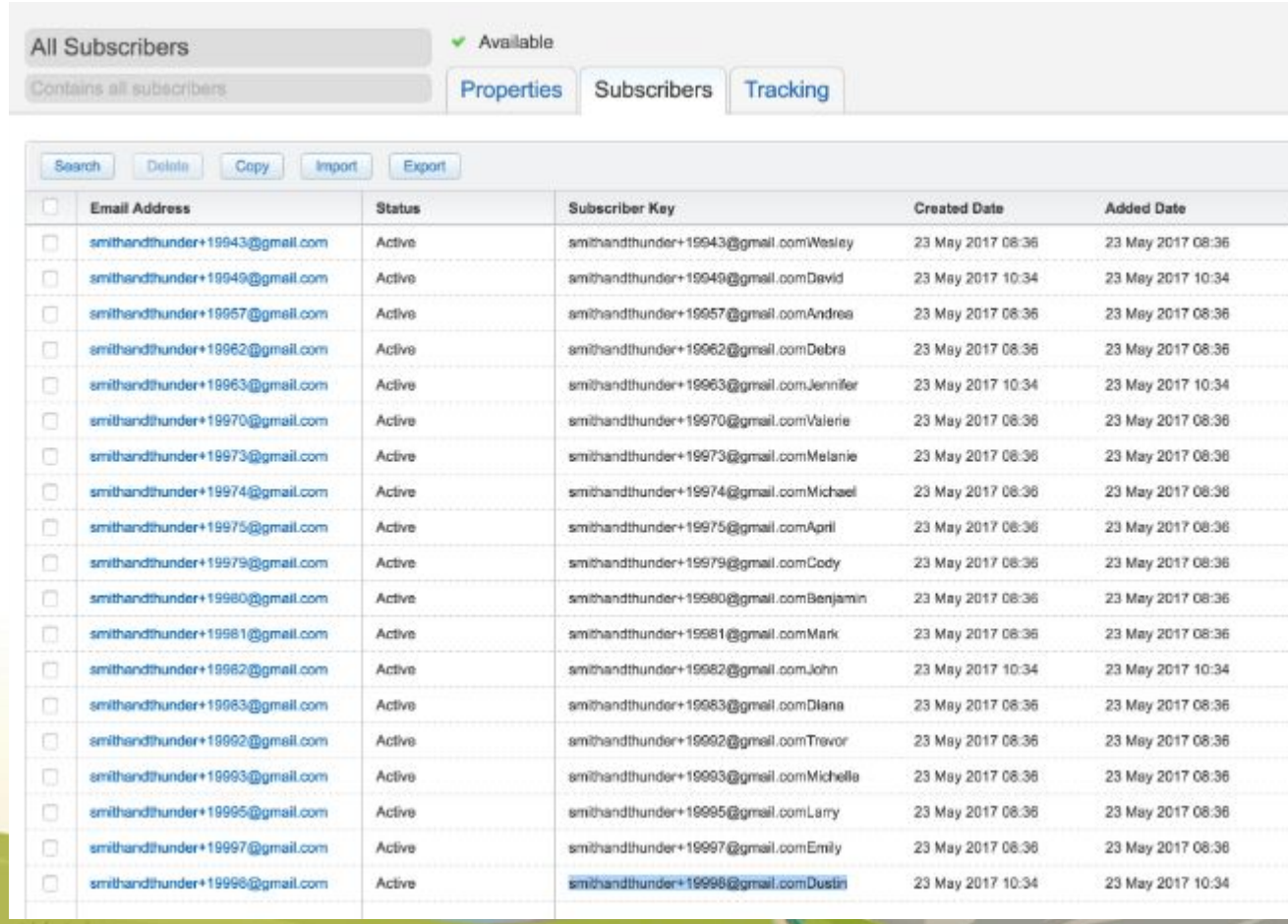
All Subscribers is a Master data record of your subscribers, their profile attributes, and their subscriber status.

Organized by Subscriber Key

Two configuration options:

- Enterprise-wide
- Business Unit Specific

Note: Subscribers stored in DEs join the All Subscribers List when you send your first message to that subscriber.

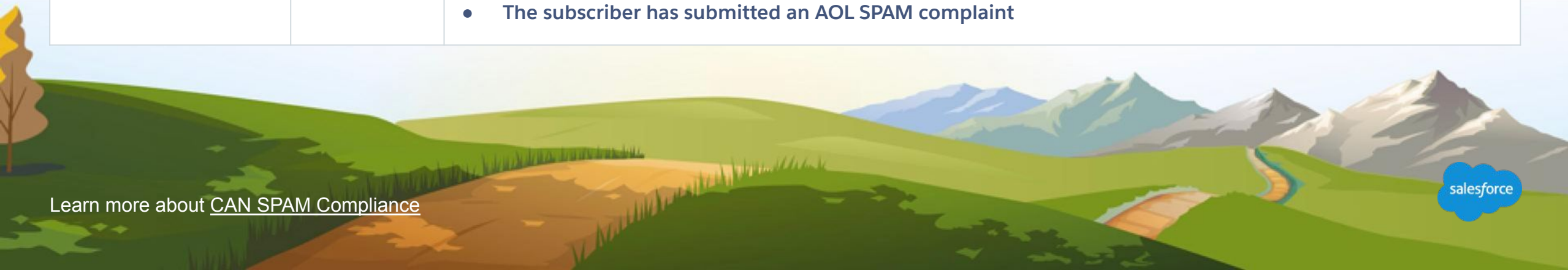


Email Address	Status	Subscriber Key	Created Date	Added Date
smithandthunder+19943@gmail.com	Active	smithandthunder+19943@gmail.comWesley	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19949@gmail.com	Active	smithandthunder+19949@gmail.comDavid	23 May 2017 10:34	23 May 2017 10:34
smithandthunder+19957@gmail.com	Active	smithandthunder+19957@gmail.comAndrea	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19962@gmail.com	Active	smithandthunder+19962@gmail.comDebra	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19963@gmail.com	Active	smithandthunder+19963@gmail.comJennifer	23 May 2017 10:34	23 May 2017 10:34
smithandthunder+19970@gmail.com	Active	smithandthunder+19970@gmail.comValerie	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19973@gmail.com	Active	smithandthunder+19973@gmail.comMelanie	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19974@gmail.com	Active	smithandthunder+19974@gmail.comMichael	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19975@gmail.com	Active	smithandthunder+19975@gmail.comApril	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19979@gmail.com	Active	smithandthunder+19979@gmail.comCody	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19980@gmail.com	Active	smithandthunder+19980@gmail.comBenjamin	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19981@gmail.com	Active	smithandthunder+19981@gmail.comMark	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19982@gmail.com	Active	smithandthunder+19982@gmail.comJohn	23 May 2017 10:34	23 May 2017 10:34
smithandthunder+19983@gmail.com	Active	smithandthunder+19983@gmail.comDiana	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19992@gmail.com	Active	smithandthunder+19992@gmail.comTrevor	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19993@gmail.com	Active	smithandthunder+19993@gmail.comMichelle	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19995@gmail.com	Active	smithandthunder+19995@gmail.comLarry	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19997@gmail.com	Active	smithandthunder+19997@gmail.comEmily	23 May 2017 08:36	23 May 2017 08:36
smithandthunder+19998@gmail.com	Active	smithandthunder+19998@gmail.comDustin	23 May 2017 10:34	23 May 2017 10:34

Subscriber Status

Marketing Cloud provides four types of subscriber status

Status	Email Sending?	Details
Active	Yes	• Subscriber has opted in for communication. • The email address is valid and deliverable • Bounce count is zero
Bounced	Yes	• Subscriber has had 1-2 soft bounces or 1 hard bounce. • Resets to active if the subscriber opens and email.
Held	No	• Subscriber has an "undeliverable" status and will be suppressed from all future sends.. • Three soft bounces in 15 days or one hard bounce from a trusted domain.
Unsubscribed	No	• Subscriber has opted out of all communications • The subscriber has submitted an AOL SPAM complaint



Learn more about CAN SPAM Compliance

Unsubscribe Context

The unsubscribe process for lists and publication lists

Master Unsubscribe	List Unsubscribe	Publication Lists Unsubscribe	In an email send definition with a target audience of data extensions
• Changes subscriber status on All Subscribers lists.	• Changes the subscriber status on that specific list and not on other lists or All Subscribers.	• Mimics lists, but is used with data extension sends. Changes the subscriber status on that specific publication list and not on other publication lists or All Subscribers.	• If you don't select a publication list, the unsubscribe context will default to All Subscribers.

Send Log Data Extensions

Allows you to capture runtime information about email send attributes for your subscribers

Purpose: can be queried afterwards or referenced for analysis

- Requires data extensions and send logging features to be enabled.
- Each account only has one send log and uses a special data extension template.
- Sendable data extension column names and data types must match column names and data types in send log for data to be recorded.
- Enable send logging on a per send basis.
- Utilize data retention on the send log so that it doesn't grow too large, for example, 30 days.
- One send log per MID (business unit)

Best Practices

- Don't store non-relevant data in send log, such as all sendable data columns.
- Focus on key or ID fields that allow linking back to source data extensions
- Examples:
  - Version ID of email creative
  - Offer ID
  - Campaign ID, if multiple IDs are used in the same send
- Send logs can be exported or referenced in a query activity for further analysis.