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MParDreamin' 2022

A Beginner's Guide to Administering Marketing Cloud Engagement

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Agenda – Our Road Ahead



What's in it for me? (WIIFM)

- Overview
- Administrative Responsibilities
- Demo
- Resources
- Questions
- Hands-On Activities (Appendix)

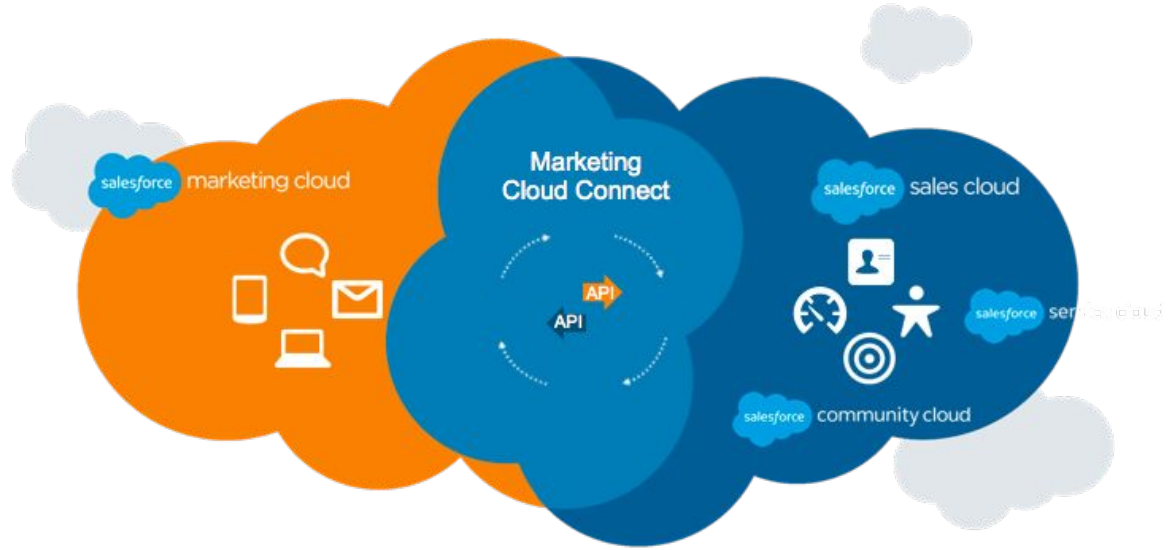


What's What

Original Product Name	“AKA”	Current Name
Sales/Service Cloud	Core, SFDC, CRM, Salesforce	Salesforce CRM
Campaign	Campaign	Campaign
Social.com	Advertising Studio	Advertising
ExactTarget	Email Studio / Mobile Studio , SFMC	Engagement
Pardot	Pardot	Account Engagement powered by Pardot
Datorama	Datorama	Intelligence
Rebelmail	Rebel	Interactive Email
Evergage	Interaction Studio	Personalization
Customer 360 Audiences	CDP	Customer Data Platform
Loyalty Management	Loyalty Cloud	Loyalty Management
Content Management System	CMS	Content Management System (CMS)

Misconceptions: CRM vs MC

- Same thing
- MC = email
- Users
- Push to Prod
- Standalone



Salesforce Marketing Cloud



Marketing Cloud connects discrete interactions, from any channel, on the customer's terms. It unites customer data with customer behaviors in real time to create more intelligent communications and interactions that respond to and anticipate customer needs.

SFMC Admin Considerations



Key Responsibilities

- Cross-functional collaboration with Marketing & IT
- Governance - Data, Compliance
- Security - User Mgt
- Integrations
- Change Management

Common Background/Skillset

- Tech Savvy
- Owner of another Salesforce Product
- Comparable marketing Technology Experience

Hiring/Staffing

- Super User
- CRM Admin

Navigation



The screenshot displays the Marketing Cloud Dashboard interface. At the top, there's a browser window showing the URL `mc.s11.exacttarget.com/cloud/#app/Marketing%20Cloud%20Dashboard?ks=ks`. Below the browser, the dashboard header includes 'marketing cloud', 'Calendar', and 'Campaigns' tabs. On the right, there are links for 'Feedback', 'Sercante (Partner Main*)', and a user profile for 'kschlau@gmail.com'.

The main navigation bar contains icons for various tools: Email Studio, Mobile Studio, Social Studio, Advertising Studio, Web Studio, Personalization, Analytics Builder, Journey Builder, Content Builder, Audience Builder, Einstein, AppExchange, and Platform. There are also radio buttons for 'My Apps' and 'All Apps'.

The 'Journey Templates' section is active, showing four templates:

- Abandoned Cart - Everyday Purchase** (Advanced): Convert customers who leave the buying process without a purchase by reminding them of the items in their cart. Includes 'Existing Customers', 'Email', and a menu icon.
- Abandoned Cart - Significant Purchase** (Advanced): Support customers who leave large-ticket items in their cart or who abandon a funnel by helping them make an informed choice. Includes 'Existing Customers', 'Email', and a menu icon.
- Anniversary Send** (Simple): Influence customers at a meaningful moment, encouraging repeat business or renewed customer engagement. Includes 'Email', 'Anniversary', and a menu icon.
- Birthday Journey with Coupon** (Advanced): Cultivate happy customers. Remember their birthdays with a special offer. Includes 'Drip', 'Birthday', and a menu icon.

Below the templates is a 'Calendar' view for 'OCT 30 - NOV 5, 2022'. The calendar shows days from Sunday to Friday. A video player is visible at the bottom left of the calendar area, showing a video titled '5:00' with play, pause, and trash icons.

Roles and Permissions



Action-based security is Pass/Fail

- **Roles:** Macro-level Security. Group multiple permissions to manage user access
- **Permissions:** Micro-level Security. Singular permission to manage user access



permission granted



permission denied



permission not explicitly granted or denied

Out of Box Roles & Permissions



MARKETING CLOUD ROLE	Permissions
Marketing Cloud Administrator	This role assigns Marketing Cloud roles to users and manages channels, apps, and tools. This role applies primarily to all Marketing Cloud functionality except Email Studio .
Marketing Cloud Viewer	This role shows cross-channel marketing activity that results in Marketing Cloud. This role is generally the most restrictive role and doesn't allow access to creation, sending, or reporting activities.
Marketing Cloud Channel Manager	This role creates and executes cross-channel interactive marketing campaigns and administers specific channels. The role permits a user to create, send, and monitor Marketing Cloud journeys and messages. Those permissions include reports.
Marketing Cloud Security Administrator	This role maintains security settings and manages user activity and alerts. Assign this role to someone who determines user access and work with Marketing Cloud security.
Marketing Cloud Content Editor/Publisher	This role creates and delivers messages through applicable channel apps. The role permits a user to create and send Marketing Cloud journeys and messages. This role doesn't include access to many reports.

Out of Box Roles & Permissions



EMAIL STUDIO ROLE	PERMISSION
Administrator	Access to all Email Studio functions including Setup, email creating, and creating data extensions
Content Creator	Access to all content, shared folders, and tracking in Email Studio, but no access to data or administrative features
Data Manager	Access to everything in Email Studio except email content
Analyst	Access to tracking features in Email Studio

Business Units



Hierarchical management of operations and data

Organize communications by and for:

- Geographical Regions
- Departments/Teams
- Brands
- Partition Data

A screenshot of the Salesforce 'Users' setup page. The left sidebar shows a navigation menu with 'Users' selected under 'ADMINISTRATION'. The main content area is titled 'Users' and shows the configuration for a user named 'John Test'. Under 'Default Business Unit', there is a list with 'Salesforce' and 'Sales - East Region'. Under 'Associated Business Units', there is a list with 'Salesforce' and 'Sales - East Region', with a mouse cursor hovering over the 'Sales - East Region' checkbox. The page includes a 'Quick Find' search bar, 'Save' and 'Cancel' buttons, and links for 'Select All' and 'select none'.

FTP

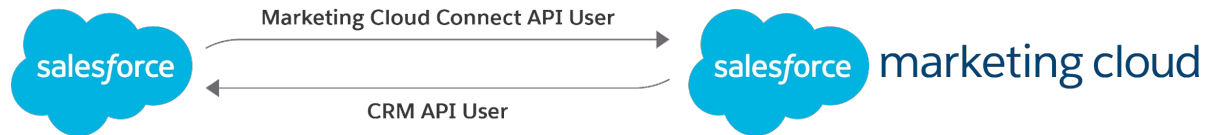


- Use FTP accounts to assign FTP privileges to users in your Marketing Cloud account.
- Marketing Cloud allows up to 10 FTP users per MID.
- Each account includes an individual status.
 - Enabled - The FTP account is ready for use.
 - Disabled - The FTP account requires enablement before use.
 - Locked - The FTP account can't be used. Contact your Marketing Cloud account representative for assistance.

Marketing Cloud Connect

What you should know...

- Is an installed package
- MC Connect is NOT Lightning Ready
- Easier flow of data from CRM to SFMC
- Default Subscriber Key = CRM ID (Contact/Lead)
- Use dedicated API users
- Use Connected App



Data Management



Marketing is more than pretty content

Organize

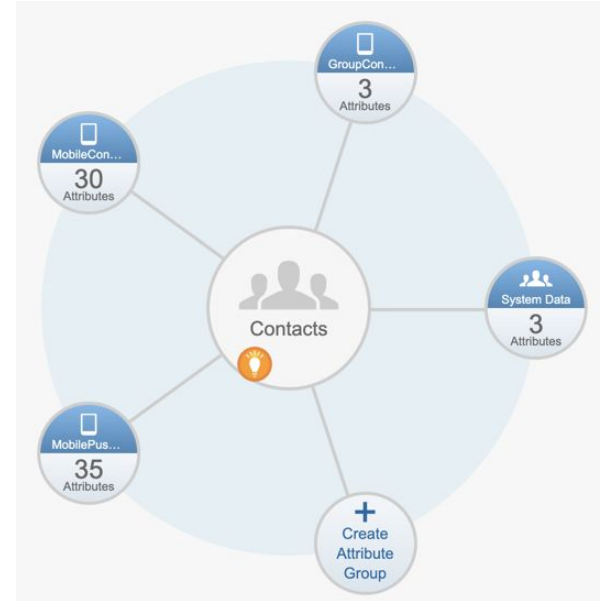
- Less is more
- Pre-segment
- Automate or not to automate...

Respect

- Consent is a requirement
- CAN-SPAM, CCPA, CASL, GDPR
- One size does NOT fit all



US Privacy Law Basics



Data Management

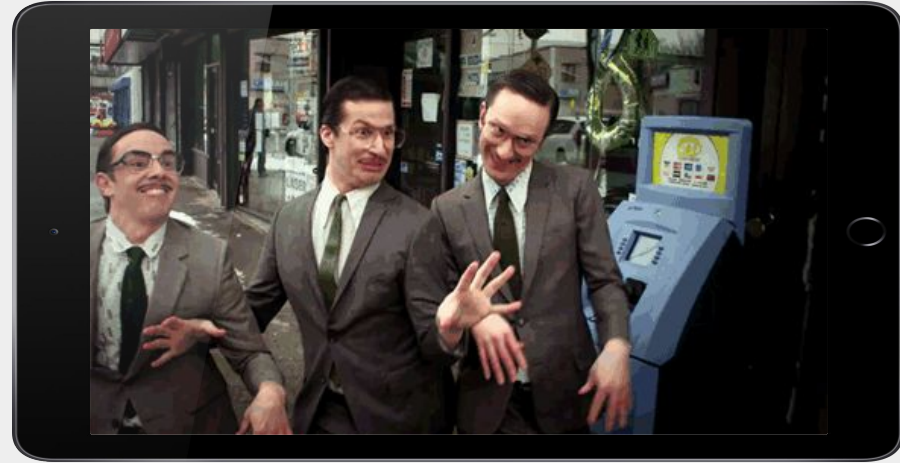
Permission Based Engagement

Channel Permission

- Email
- Mobile
- "Snail" Mail

Interests

- Anniversaries
- Promotions
- Topics



Anti-Spam at Marketing Cloud



Demo



Resources

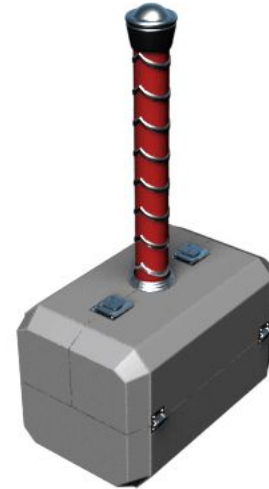


Trailhead

- [Marketing Cloud Engagement Basics](#)
- [Email Studio Basics](#)
- [Administer Marketing Cloud Engagement](#)
- [Marketing Cloud Connect](#)

Help Documentation

- [Marketing Cloud Engagement](#)
- [Email Studio](#)





Questions





Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

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Hands-On Activities



Hands-On – Updating Account Settings



1. Navigate to Setup
2. Find Account Settings
3. Click Edit
4. Set Hide All Apps Option to “On”
5. Save

Note: Most system administration activities are performed in Setup

Hands-On – Creating a User



1. Navigate to Setup
2. Find Users
3. Create User
4. Specify a name <your name>
5. Specify a username <yourname@bcu.test>
6. Specify a temporary password <Welcome@1>
7. Specify a verify password <Welcome@1>
8. Save

Note: As an admin, you may have to disable users

Hands-On – Assigning User Permissions



1. Navigate to Setup
2. Find User
3. Check the box next to the user
4. Click on Manage Roles
5. Click on Edit Roles
6. Check the box(es) next to the role(s) you want to assign
7. Save

Note: Roles are generally preferred over Permissions

Hands-On – Creating an FTP User



1. Navigate to Setup
2. Find FTP Accounts
3. Add FTP User

Note: Import and export data to support business operations

Hands-On – Creating Sender Profile



1. Navigate to Setup
2. Find Sender Profile
3. Create Sender Profile
4. Specify a name <your name>
5. Save

Note: Who is sending the message

Hands-On – Creating Delivery Profile



1. Find Delivery Profile
2. Create Delivery Profile
3. Specify a name <your name>
4. Save

Note: What type of message are you sending

Hands-On – Creating Send Classification



1. Find Send Classification
2. Create Send Classification
3. Specify a name <your name>
4. Select Your Sender Profile
5. Select Your Delivery Profile
6. Save

Note: Combines Sender and Deliver Profile

Hands-On – Send Email



1. Navigate to Content Builder
2. Create Email Message
3. Select your Template from “Saved”
4. Name your email <Example: Month Day Test Your Name>
5. Add Subject Line
6. Test Send
7. Select your Saved Send Classification
8. Send Test
9. Save

Note: Always test before you send the real deal