



Learn. Network. Grow.

MParDreamin' 2022

Considerations For Marketing To A Global Customer Base At Scale

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Approaches to Global Marketing



Centralized Global Team

Owens the technology and provides local teams with templates & services to help with their execution & delivery

Challenges:

- Local demands
- Reduced agility
- Disorganized solutions

Independent Local Marketing Team

Provide support to their established regions to execute the needs of each in nimble fashion

Challenges:

- Not scalable
- Work duplication
- No governance
- Never truly autonomous

SOLUTION: Global Governance with Local Enablement

Flexible governance system that provides regions some liberty and business flexibility to customize based upon their regional needs without jeopardizing compliance, data hygiene etc

Key Topics Covered

- Email preferences center & consent management (unsubscribes)
- Building email templates for localization
- Global email production processes and governance



Email Preference & Consent Management

The Task:

Develop solution to support global efforts, and ensure legal compliance with items such as CAN-SPAM, CASL and GDPR and at scale

Solution: Dynamic Email Footer

Core Components:

- Contact Builder
- AMPScript
- Content Builder

Benefits:

- Easy to manage globally
- User friendly especially for non-technical users

CAN-SPAM Requirements



Platform Requirements

- Business Name
 - Scripted as %%member_busname%%
- Physical Address
 - %%member_addr%%
 - %%member_city%%
 - %%member_state%%
 - %%member_postalcode%%
- Unsubscribe Link
 - %%profile_center_url%%

¹This is the default out-of-the-box profile center for a Marketing Cloud implementation, ***it has been included in an HTML comment for validation purposes***, but your unsubscribe link will be pointed to your custom opt out page

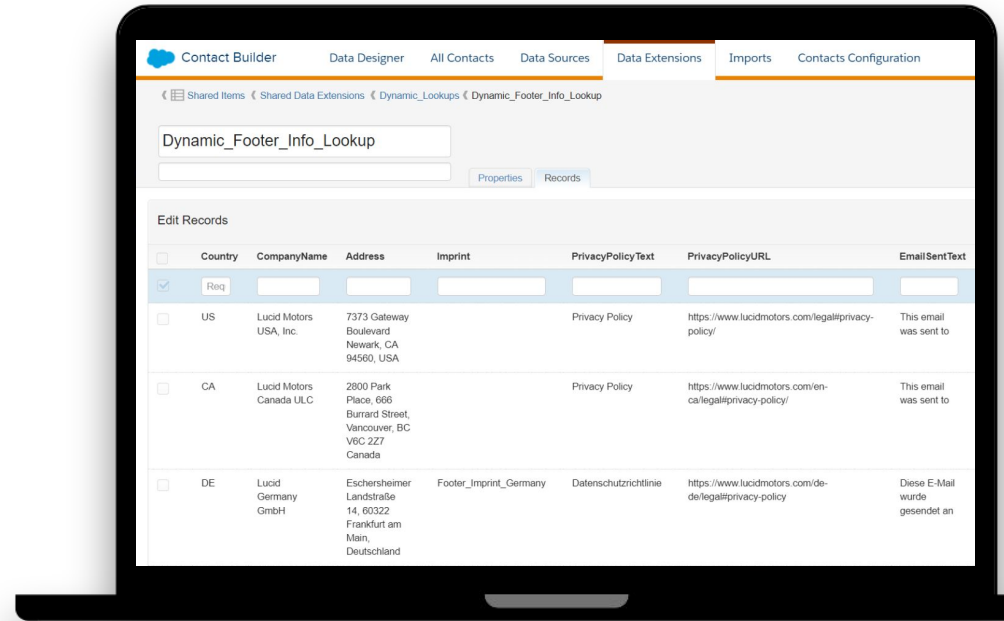
Step 1: Contact Builder



Contact Builder defined:

Helps you maintain the contact information you use to identify individual contacts across multiple channels and personalize messaging and marketing activities.

- Create Data Extension (DE) with required fields
- Use country as the unique identifier



Step 2: AMPScript



- Develop custom AMPScript to pull all the necessary information out of the lookup table based on recipient country
- Each item in the footer is set into a variable
- Prepare for error handling

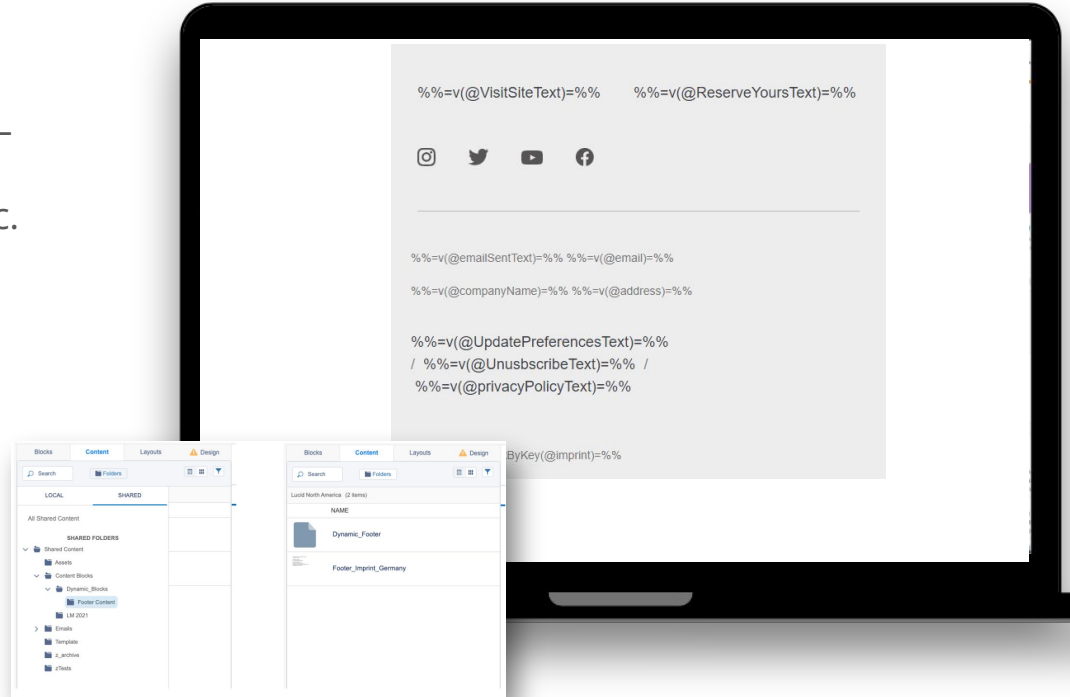
```
/* Cancel send for record if no value for "Country" found */  
If empty(@country) then  
  RaiseError('No Country value found in customer data',true)  
EndIf  
  
/* Define Rowset and Row from Lookup */  
If not empty(@country) then  
  Set @countryRows = LookupRows("ent.Dynamic_Footer_Info_Lookup","Country",@country)  
  If RowCount(@countryRows) > 0 then  
    Set @countryRow = Row(@countryRows,1)  
  Else  
    RaiseError('Country not found in Footer Lookup Table',true)  
  EndIf  
EndIf
```

```
/* Define variables */  
Set @companyName = Field(@countryRow,"CompanyName")  
Set @address = Field(@countryRow,"address")  
Set @imprint = Field(@countryRow,"imprint")  
Set @privacyPolicyText = Field(@countryRow,"privacyPolicyText")  
Set @privacyPolicyURL = Field(@countryRow,"privacyPolicyURL")  
Set @emailSentText = Field(@countryRow,"emailSentText")  
Set @UpdatePreferencesText = Field(@countryRow,"UpdatePreferencesText")  
Set @UnsubscribeText = Field(@countryRow,"UnsubscribeText")  
Set @VisitSiteText = Field(@countryRow,"VisitSiteText")  
Set @VisitSiteURL = Field(@countryRow,"VisitSiteURL")  
Set @ReserveYoursText = Field(@countryRow,"ReserveYoursText")  
Set @ReserveYoursURL = Field(@countryRow,"ReserveYoursURL")
```

Step 3: Content Builder



- Create content block: Text block or HTML block
- Add custom AMPScript in the HTML tab and then configure your content, including styling, icons, etc. using either HTML or the rich text editor
- Save to shared folder for global access



Email Overview Content Subscribers Interactions A/B Testing Tracking Admin
Feedback Lucid North America Kirsten Schlau

← Edit Email Dynamic Footer Test Last saved on 10/25/2022 at 10:05 AM Save

Properties Content Preview and Test BACK

Subscriber Preview and Attributes

0031Q00002ZLQFYQAM





ATTRIBUTE	VALUE
EmailAddress	swen.reinhardt@me.com
FirstName	
LastName	
Country	DE
ContactCreatedDate	
SubscriberKey	0031Q00002ZLQFYQAM
PreferredLocale	en
Preference_Center_Id_c	1555150746000C0gTVUjZdJE#fz

Subject: Dynamic Footer Test

Preheader:

Layout Plain Text Desktop

Besuche unsere Seite Reservierungen

Diese E-Mail wurde gesendet an swen.reinhardt@me.com

Lucid Germany GmbH Eschersheimer Landstraße 14, 60322 Frankfurt am Main, Deutschland

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Lucid Germany GmbH

Eschersheimer Landstraße 14,
60322 Frankfurt am Main, Deutschland

Sitz der Gesellschaft: Frankfurt
Registergericht: Amtsgericht Frankfurt
Merkmalen: www.Lucid.de, USt-IdNr. DE275665

4:59



Templates for Locationalization

65% of global consumers answered that they **prefer content in their native language even if it's poor quality**

- [CSA Research "Can't Read, Won't Buy,"](#)

Content Builder



Functions as a content library within your Marketing Cloud account.

Provides a way to host and organize various content directly within Marketing Cloud for use across the various channels you employ: email, sms, push, cloud pages and even social advertising.

Content can include:

- Images
- Content Blocks
- Templates
- Videos
- Documents

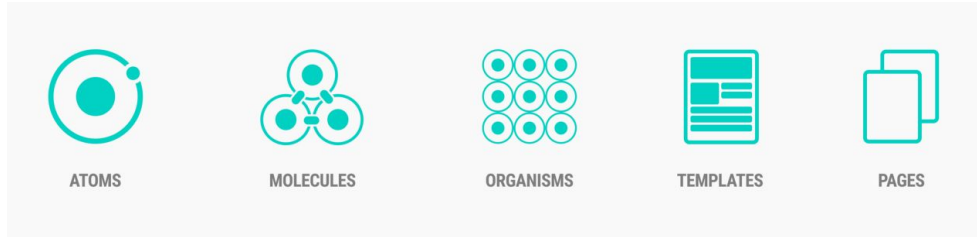
The screenshot shows the Marketing Cloud Content Builder interface. At the top, there are navigation tabs: Email, Overview, Content (selected), Subscribers, Interactions, A/B Testing, Tracking, and Admin. Below the tabs, the 'Content Builder' section is active. On the left, a sidebar shows a folder structure under 'Lucid North America', including 'Content Builder', 'Content Blocks', 'Sercante', 'Content Blocks', 'Template Tests', 'Templates' (highlighted), 'Test', and 'z_Trash'. The main area displays a list of 8 content items, all of which are templates. The list has columns for 'NAME' and 'TYPE'.

	NAME	TYPE
<input type="checkbox"/>	DynamicEmail_Template	Template
<input type="checkbox"/>	Marketing_Automated	Template
<input type="checkbox"/>	Marketing_Event	Template
<input type="checkbox"/>	Marketing_InTheNews	Template
<input type="checkbox"/>	Marketing_Newsletter	Template
<input type="checkbox"/>	Marketing_Onboarding1	Template
<input type="checkbox"/>	Marketing_Onboarding2	Template
<input type="checkbox"/>	Marketing_Onboarding3	Template

Atomic Design Approach



Atomic design is not a linear process, but rather a mental model to help us think of our user interfaces as both a cohesive whole and a collection of parts at the same time.



Questions to consider:

- Repetitive vs Unique Content?
- What should be locked down vs editable?
- How are teams organized? What is their SF access?

30 Content Items Content Builder > Sercante > Content Blocks		
	NAME ↑	TYPE
<input type="checkbox"/>	Body_Text	Text
<input type="checkbox"/>	Configuration Details	Text
<input type="checkbox"/>	Dark_CTA	Button
<input type="checkbox"/>	Dark_CTA_Header	Button
<input type="checkbox"/>	Dark_Footer_Legal_EN	Text
<input type="checkbox"/>	Dark_Line	Text
<input type="checkbox"/>	Event_2Col_Day	Free Form
<input type="checkbox"/>	Event_Body_Subhead	Text

Content Builder Benefits



- Consolidated content library, all your content in one place
- Drag and drop interface makes it easy to upload new content
- Email campaigns can be built from out-of-the-box templates and layouts that allow someone with limited HTML experience to quickly create and update new campaigns
- Dynamic content rules can be built and quickly tested with WYSIWYG interface
- Content areas can be locked to protect branding or global assets such as headers and footers

Email Client Support



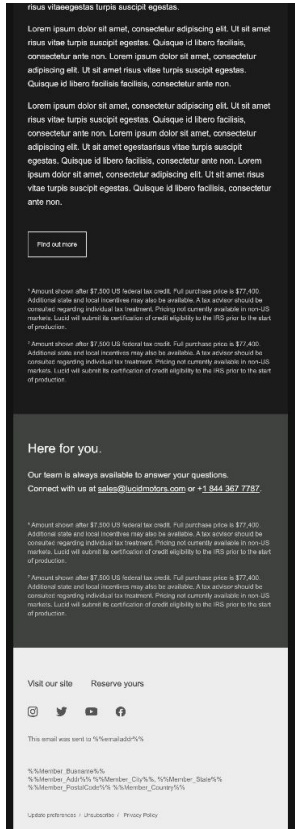
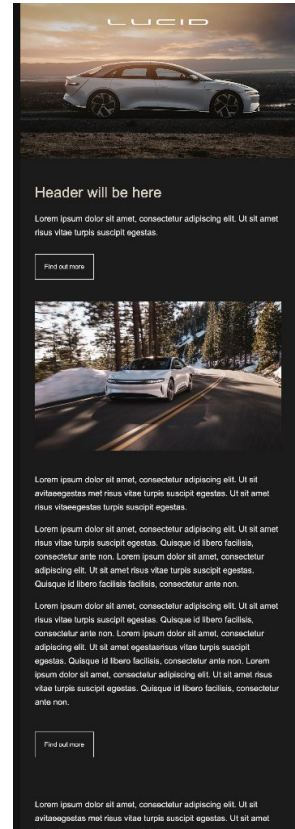
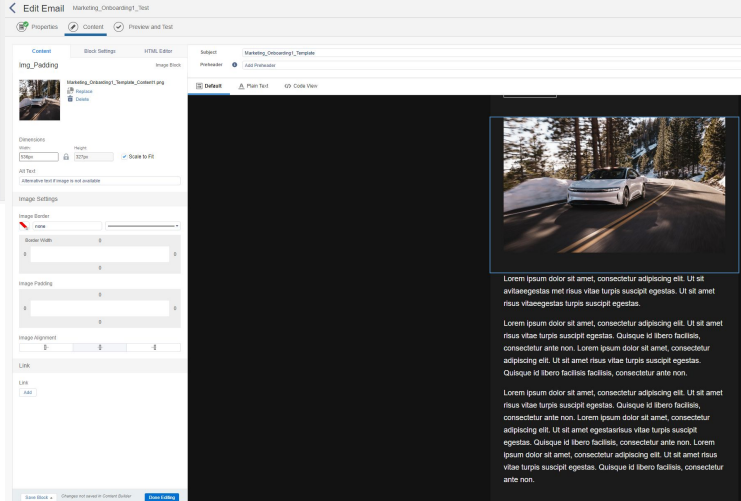
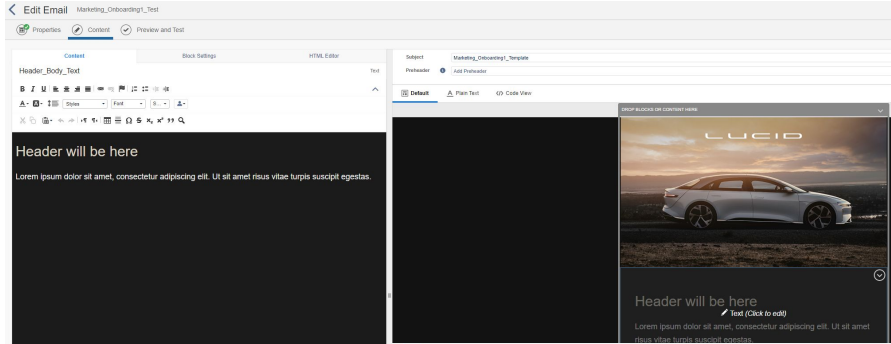
Content Builder Templates are supported across a large set of desktop and mobile clients.

[Email Client Support for Default Templates](#)

Desktop Clients			
TYPE	CLIENT	OPERATING SYSTEM OR BROWSER	GRADE
Desktop	Outlook Office 365	Windows 10	B
Desktop	Outlook Office 365 Dark	Windows 10	B
Desktop	Outlook Office 365	mac OS 10.15	A
Desktop	Outlook 2019	Windows 10	B
Desktop	Windows 10 Mail	Windows 10	B
Desktop	Outlook 2016	Windows 10	B
Desktop	Outlook 2016	OS X 10.12	B
Desktop	Apple Mail 13	macOS 10.15	A
Desktop	Apple Mail 13 Dark	macOS 10.15	A
Desktop	Apple Mail 12 Dark	macOS 10.14	A

Mobile Clients			
TYPE	CLIENT	OPERATING SYSTEM OR BROWSER	GRADE
Mobile	iPhone 11 pro max	iOS 13	A
Mobile	iPhone 11 pro	iOS 13	A
Mobile	iPhone 11 pro Dark	iOS 13	A
Mobile	iPhone 11	iOS 13	A
Mobile	iPhone XR	iOS 13	A
Mobile	iPhone XS	iOS 12	A
Mobile	iPhone 8 Plus	iOS 13	A
Mobile	iPhone XS Max	iOS 12	A
Mobile	Microsoft Outlook	iOS 11.13	A
Mobile	iPad Pro (12.9 inch)	iOS 13	A
Mobile	iPad Pro (11 inch)	iOS 13	A
Mobile	iPad Mini	iOS 13	A
Mobile	iPad (Gen 7)	iOS 13	A
Mobile	Gmail App	iOS 13	A
Mobile	Gmail App	Android 8.0	A
Mobile	Samsung Mail	Android 10.0	B

Using Templates





Email Production & Governance

Keys to Success

- Standard Operating Procedures
- Proper Toolset
- Change Management & Governance



Standard Operating Procedures

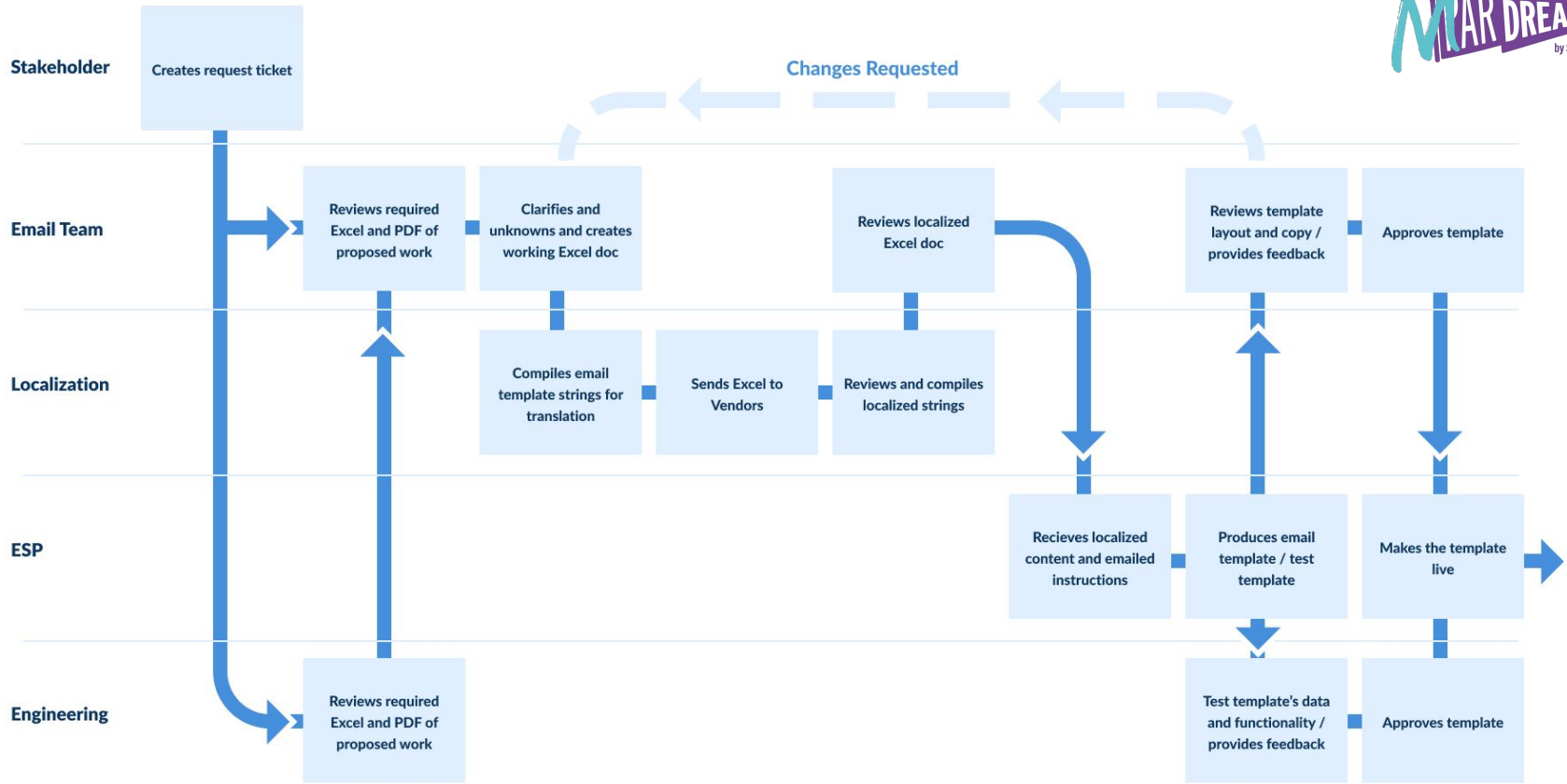


Where to begin?

1. Documentation of your current email production workflow
2. Identify gaps → refine/develop standardizes templates/resources
3. Review with key stakeholders and align on timing

Email Production Workflow Example

1. *Strategy and brief development*
2. *Content and copy creation*
3. *Visual design*
4. *Stakeholder Sign off*
5. *Creative QA/Proofing*
6. *Handoff for Build*
7. *Development and Build*
8. *Rendering QA/Inbox placement QA*
9. *Final Scheduling and day-of verification*



Example of Email Production Workflow

Proper Toolset



Picking the Right Toolset

1. Access
2. UX
3. Integration

Change Management & Governance



- **Change Management:** *A collective term for all approaches to prepare, support, and help individuals, teams, and organizations in making organizational change*
- **Email Governance:** *Your business' protection against business brand reputation, email compliance and client data security. It's an internal set of rules and guidelines written specifically for your company that outlines your email policies and best practices.*



10 tips for effective email/data governance & policies:



1. Ensure required team members have read the email policies
2. Get team members to sign a document agreeing to the policies (or include the email governance as part of their employee/team onboarding/training).
3. Include contingency plans and what should happen in case of policy breach.
4. Address legal issues that need to be complied with, for example regionalised email compliance laws.
5. If appropriate, contain scripts or templates for contacting clients/customers.
6. Document clear use cases of what is and isn't allowed when it comes to working with prospect/customer data and working with 3rd party partners
7. Include, in detail, policies for dealing with sensitive information (e.g. contact details or order information) of employees, clients and customers and ensure they comply with the Data Protection Act. Email encryption for sensitive data etc etc.
8. Identify senior staff members that employees can contact if they have any questions about the email governance policies and ensure those staff members are adequately trained to deal with these enquiries.
9. Review your documents regularly to ensure they are still up-to-date and relevant.
10. Publish policies in a central location for easy access to all - such as an company



Q&A?



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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