



Learn. Network. Grow.

MParDreamin' 2022

Unleash the Power of the Marketing Cloud Connect

Vicki Moritz-Henry

Architect & Salesforce Certified Instructor

SAMA Consulting / Trailhead



Special Thanks To Our Sponsors



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Why Connect Your Data?

1. Break down team verticals.
2. Segment your audiences from anywhere.
3. Get a 360 degree of your customers.
4. Enrich your Salesforce data with marketing interactions & insights.
5. Personalize your content using any data point at your fingertips.
6. Create human touch points to get the deal over the line.

What does the Marketing Cloud Connect do?

Bidirectional data sync

Salesforce data powering
Marketing Cloud



Marketing Cloud interactions
recorded in Salesforce





Target the Perfect Audience

How do we choose who to send to?



Use Your Data Wisely!



Search...

Sales Home Opportunities Leads Tasks Files Accounts **Contacts** Campaigns Dash

Contact
Prof. Vicki Moritz-Henry

Account Name	SAMA Consulting	Email	vmoritzhenry@gmail.com
Title		Position	Executive
Contact Currency	USD - U.S. Dollar		

> Address Information

∨ Additional Information

Fax		Birthdate	10/31/1989
Home Phone		Age	32.00
Other Phone		Department	
Gender	Male	Interest	Cross Country Skiing

∨ Shopping Profile

Last Purchase Date		Total Spend YTD	
Last Items Purchased			



Personalise Your Content

Get the Right Message to the Right Person



Content | Block Settings

Block not saved | Dynamic Content

Subject: Welcome to MarDreamin!

Preheader: %%FirstName%%, we can't wait to meet you.

Dynamic Block Options:

- Keep content blocks up-to-date.
- Make local copies of content blocks.

MarDreamin VIEWING

MarDreamin.jpeg

- Replace
- Delete

01_MarDreamin__MarDreamin.jpeg

Automation Dreamin


Automation Dreamin.jpeg

- Edit
- Delete
- Duplicate

Next_Event__c is equal to Automation Dreamin

Save Block | Done Editing

Default | Plain Text | Code View



I'm Speaking At
MARDREAMIN' 2022

JOIN ME
November 2-4 | Virtual

#MARDREAMIN2022

%%FirstName%%, we're looking forward to having you at %%Next_Event__c%%

Would you like to be a speaker?



**Send from where your users
are working**

Send to a Single Lead or Contact



Somebody is requesting a one-off email?

No problemo!

No more hacky work-arounds thanks to sending a one-off email directly from Salesforce.

Email Send

A/B Tests | Triggered Sends | Change Marketing Cloud User | Configure Marketing Cloud Connector

= Required Information

Contact	Vicki Moritz-Henry
Business Unit	Northern Trail Outfitters (517013882)
Email	Newsletter Preview Email Find
Subject	<input type="text" value="Attend MarDreamin"/>
From	<input checked="" type="radio"/> Email Address <input type="text" value="Record Owner"/> <input type="radio"/> Send Classification
Disable Individual Level Tracking	<input type="checkbox"/>
Send Date and Time	<input checked="" type="radio"/> Immediately <input type="radio"/> Schedule Future Send
I certify this person has opted in	<input type="checkbox"/>

[Send](#)

Let Your Sales & Service Teams Do Your Segmentation



Send to Reports



Report: Contacts & Accounts
Newsletter

Total Records

43

	First Name	Last Name	Email	Contact ID
1	Roslyn	Casas	rcasas.10048.0996@hotmail.exacttargettest.com	0038c000032pnVj
2	Kim	Calloway	kcalloway.10048.0998@gmail.exacttargettest.com	0038c000032pnVI
3	Pamula	Escamilla	pescamilla.10049.0000@hotmail.exacttargettest.com	0038c000032pnVn
4	Owen	Hirsch	ohirsch.10049.0007@yahoo.exacttargettest.com	0038c000032pnVu
5	Jonah	Dunlap	jdunlap.10049.0042@yahoo.exacttargettest.com	0038c000032pnVB
6	Derick	Basham	dbasham.10048.0965@yahoo.exacttargettest.com	0038c000032pnVE
7	Stefany	Dennison	sdennison.10048.0966@yahoo.exacttargettest.com	0038c000032pnVF
8	Virgie	Alicea	valicea.10048.0968@hotmail.exacttargettest.com	0038c000032pnVH
9	Drew	Hamilton	dhamilton.10048.0970@yahoo.exacttargettest.com	0038c000032pnVJ
10	Myrie	Lindgren	mlindgren.10048.0975@gmail.exacttargettest.com	0038c000032pnVO

* Need the Record ID & Email Address

Send to Campaigns



Campaign
MarDreamin

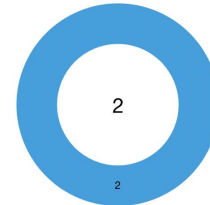


Campaign Members

Add Leads

Add Contacts

Number of Members



* Add the contact or lead as a campaign member.

* Benefit from Common fields.

Pick Your Poison 'ahem' Send Method



Send to a report or campaign from Salesforce

Send to a report or campaign from Marketing Cloud Email Studio

Automate Salesforce Sends from Automation Studio

Use contact data to filter on Journey Sends

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9



Break Down Team Verticals with Journey Builder

Use Your Salesforce Data to Drive Your Customer Journeys



Define Entry Source

New Entry Sources




Salesforce Community Welcome
Use this event to power a Welcome Journey when new members get added.

CommunityCloudIntegration
Last Modified: 05/24/2021 5:04 pm



Salesforce Campaign
Use this event to power a Journey based on your Salesforce Campaigns.

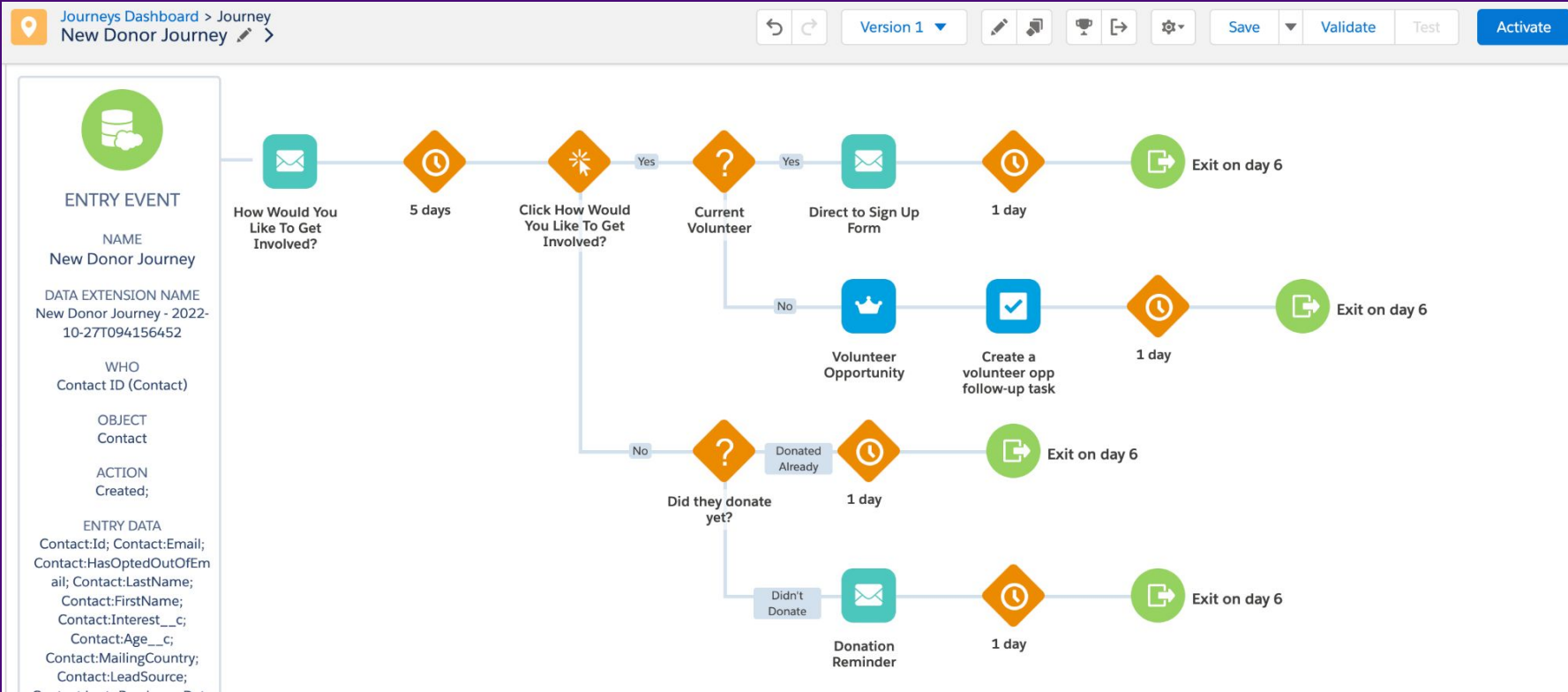
SFCampaignIntegration
Last Modified: 05/24/2021 5:04 pm



Salesforce Data
Use this event to power a Journey based on your Salesforce data.

SalesforceDataIntegration
Last Modified: 05/24/2021 5:04 pm

Getting Your Two Systems to Speak





Enriching your CRM data with Marketing Cloud touch points

▼ Sales & Service Cloud



Account



Campaign
Member



Case



Contact



Convert Lead



Lead



Object Activity



Opportunity



Task

**Oh the Salesforce
activity possibilities!**

View Tracking Data from Salesforce



Contact
Prof. Vicki Moritz-Henry

Email Sends (1)

Date Sent	Email Name	Email Send Number	Business Unit
10/18/2022, 8:44 AM	Case Survey Email	00000049	Northern Trail Outfitters (51701...

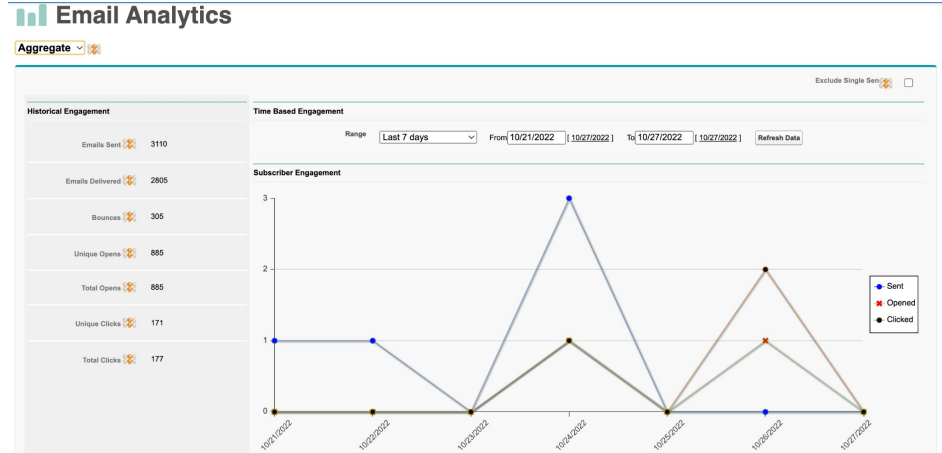
[View All](#)

Individual Email Results (6+)

Email Name	Date Sent	From Name	Opened
Case Survey Email	10/18/2022, 8:44 AM	Northern Trail Outfitters	<input checked="" type="checkbox"/>
Newsletter	10/18/2022, 8:59 AM	Northern Trail Outfitters	<input type="checkbox"/>
Mountain 25	10/19/2022, 6:55 AM	Northern Trail Outfitters	<input checked="" type="checkbox"/>
Case Survey Email	10/19/2022, 7:35 AM	Northern Trail Outfitters	<input checked="" type="checkbox"/>
Welcome Email 1	10/20/2022, 6:51 AM	Northern Trail Outfitters	<input type="checkbox"/>
Birthday	10/24/2022, 7:00 AM	Northern Trail Outfitters	<input type="checkbox"/>

[View All](#)

Opportunities (0)





Let's review...



Why connect your data?



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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!

Vicki Moritz-Henry

LinkedIn: <https://bit.ly/VickiMoritzHenry>

Twitter: @VickiHenry63