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How to Make Data Cloud Data Actionable in Marketing Cloud

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Thanks To Our Incredible Sponsors

Agenda

- Use Case
- Overview: Ingestion, Unification, Data Action
- Drive actions - Segment
    - Activation Target & Activation
    - Segment based Automation & Journey
- Drive actions - Data Actions
    - Calculated Insights
    - Data Action Target/Data Action
    - Data Action driven Journey & content

WELCOME TO

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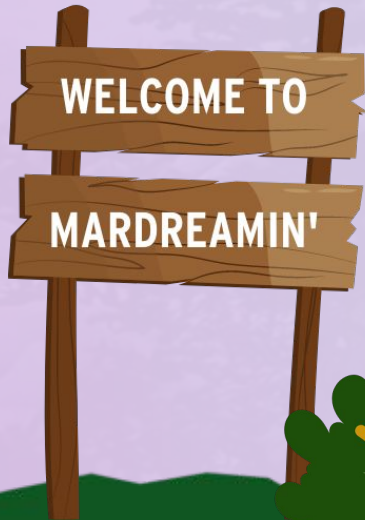
Use Case

Cervello Bank has launched their new mobile trading app with an all out marketing blitz.

Problem:

- Sign ups and trades are 50% lower than expected
- Mobile data is siloed
- Mobile communication options limited

Use Case - Sales Funnel

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Segment #1

No Account (20%)

No Bank Link (80%)

Prospects
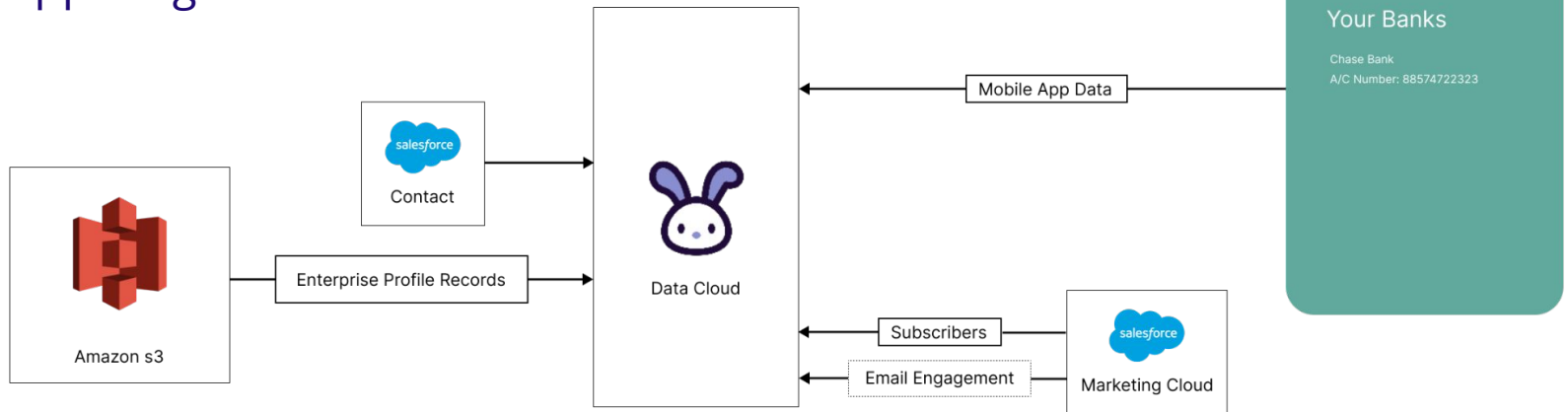
Traders

Segment #2

First Deposit (70%)

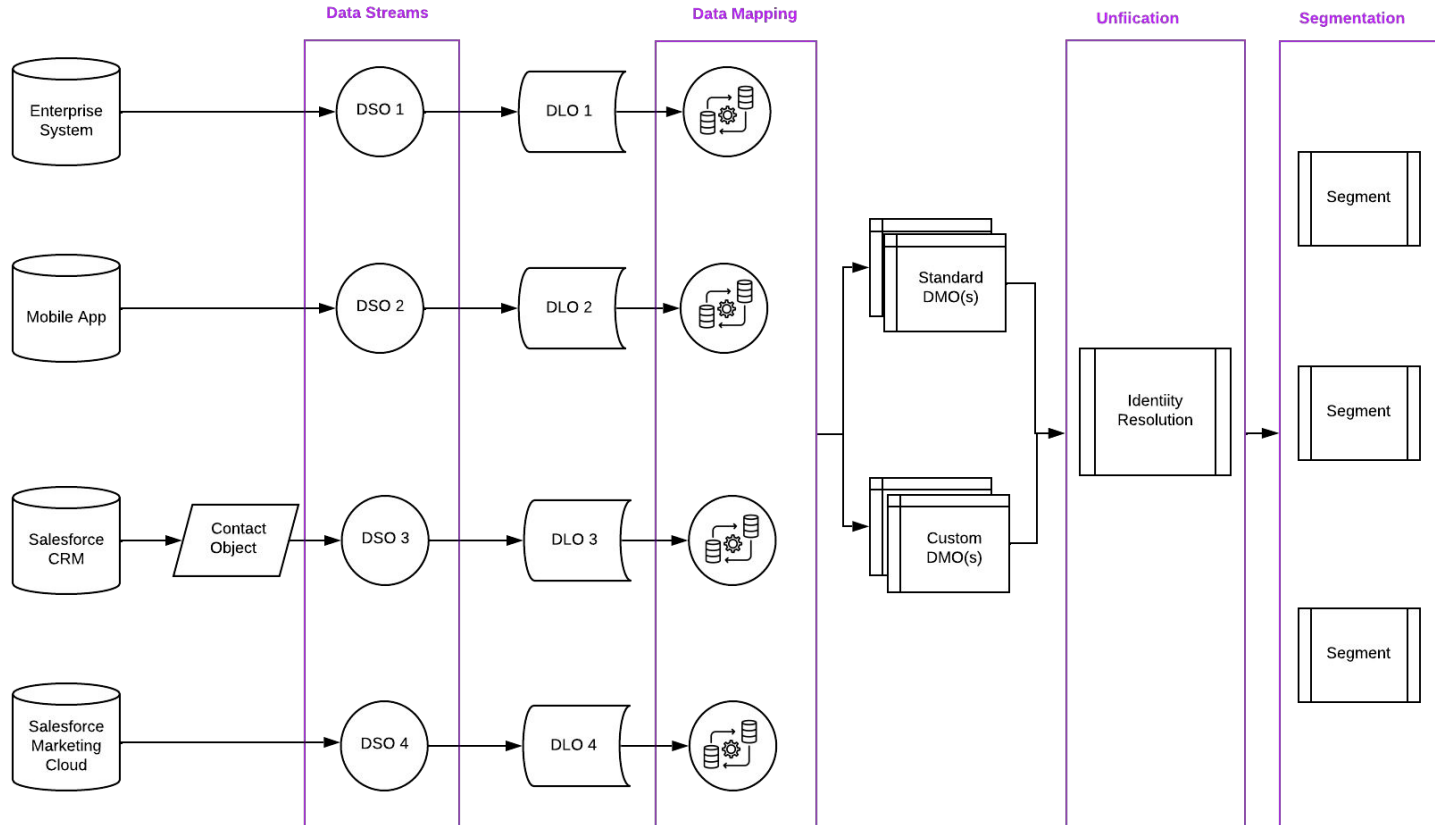First Trade (30%)

Data Model Overview

- Enterprise data is hosted in Amazon s3 and includes broad customer demographic data
- Financial Services client with a mobile app that allows customers to deposit cash into their accounts
- Salesforce CRM and SFMC contain contact and subscriber information
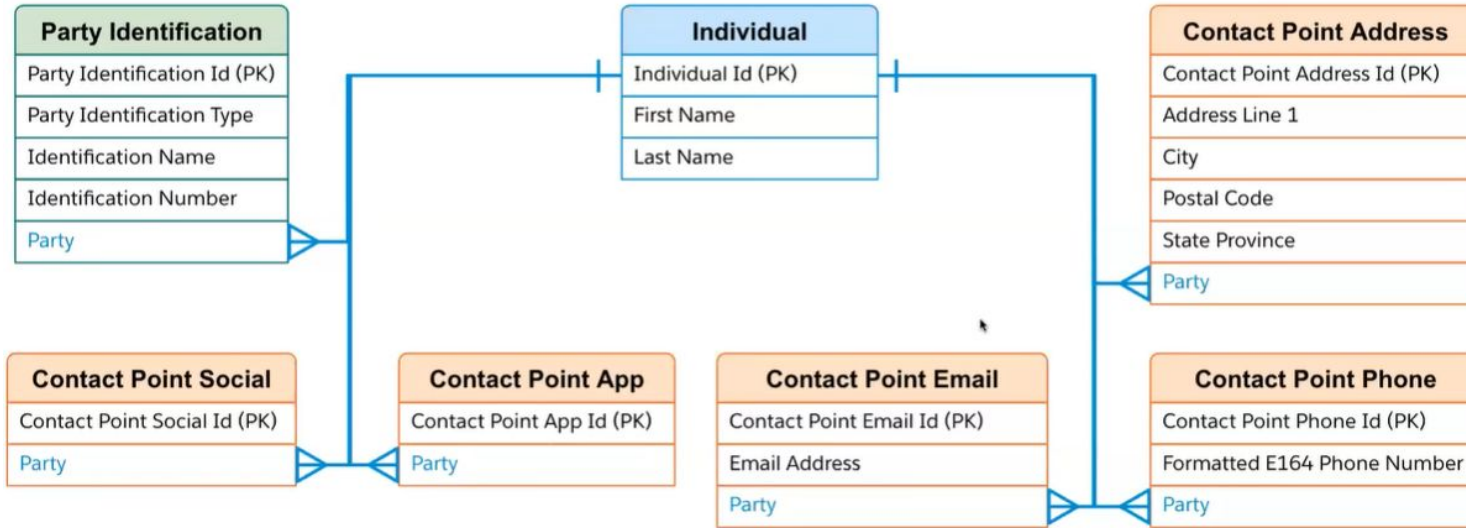- Mobile App database contains user records only relevant to the app usage

Mapping & Unification

Data Cloud - Model Overview

Required Mappings

Party Identification
Party Identification Id (PK)
Party Identification Type
Identification Name
Identification Number
Party

Individual
Individual Id (PK)
First Name
Last Name

Contact Point Address
Contact Point Address Id (PK)
Address Line 1
City
Postal Code
State Province
Party

Contact Point Social
Contact Point Social Id (PK)
Party

Contact Point App
Contact Point App Id (PK)
Party

Contact Point Email
Contact Point Email Id (PK)
Email Address
Party

Contact Point Phone
Contact Point Phone Id (PK)
Formatted E164 Phone Number
Party

- **Primary Keys -** unique identifier in a table, cannot be changed.
- **Foreign Keys -** links one table to another; relates to other data tables (e.g., Sales Order ID and Sales Order)
- **Cardinality -** relationship between records in each table (1:n, n:1)

Driving Actions in Marketing Cloud
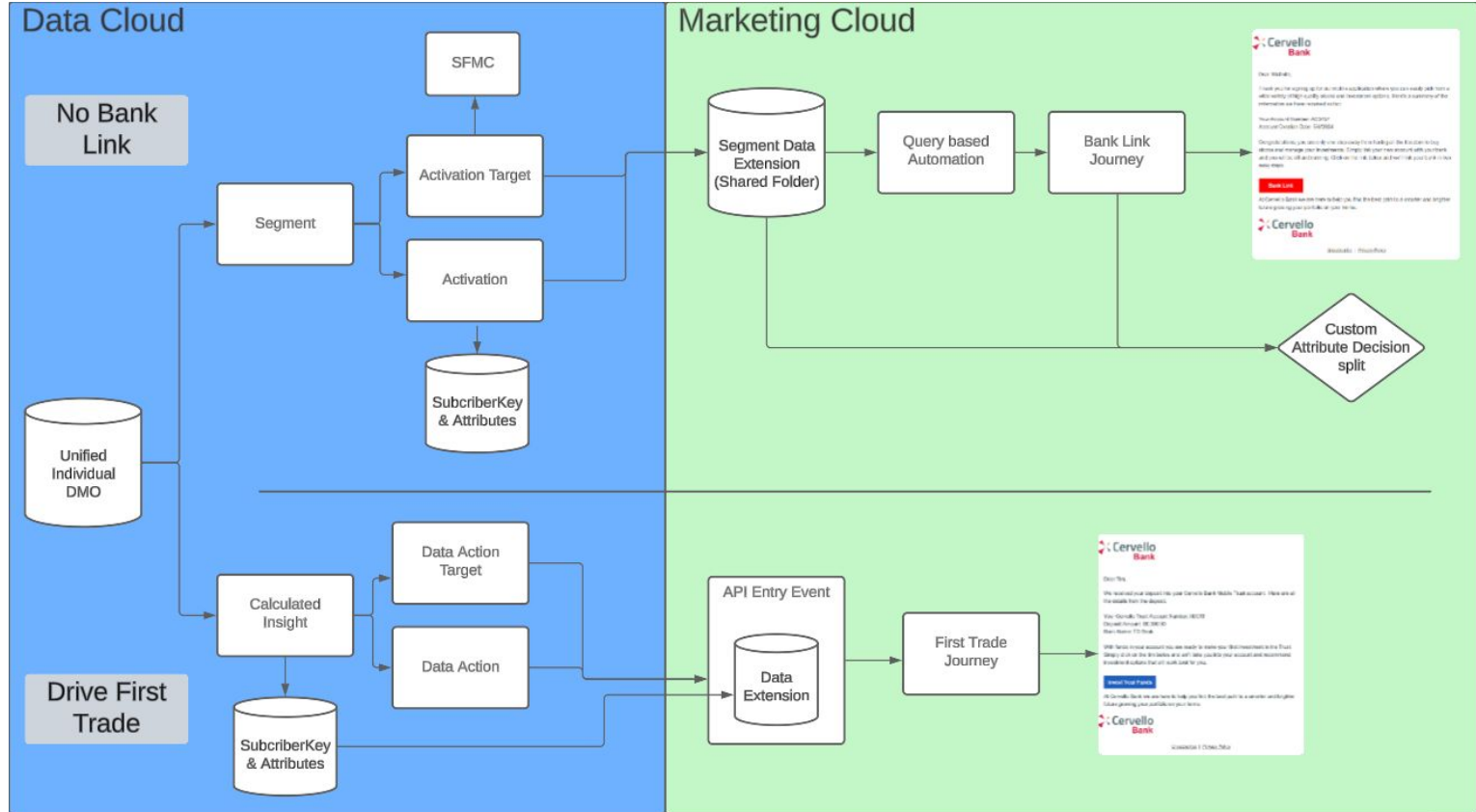
Drive Actions - Segment

Data Cloud
- Create Segment
- Create Activation Target
- Create Activation - assign subscriber key & attributes
- Publish
- Validate data in SFMC

SFMC

- Query/Automation to pull from the data extension
- Dynamic content to align with data points
- Custom attribute for journey paths

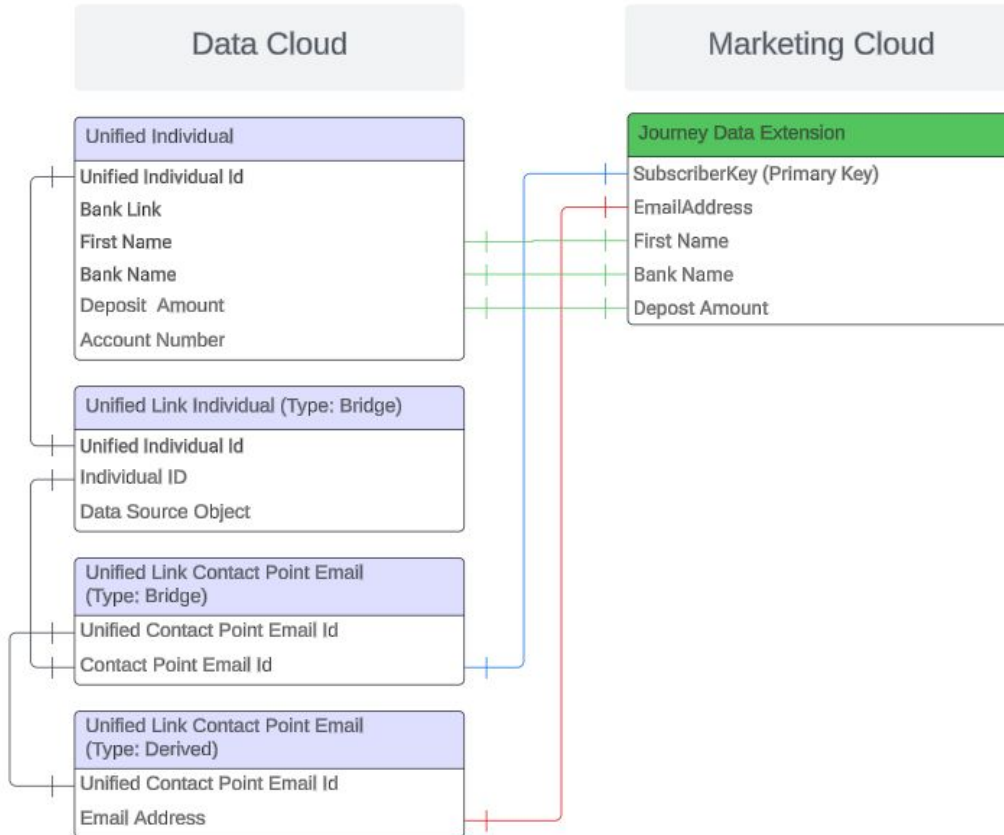# Drive Actions - Data Action

Data Cloud
- Understand Data Model
- Build the Calculated Insight (create API Entry Event)
- Create Data Action Target
- Create Data Action
- Publish and validate data

SFMC

- Create API Entry Event Journey
  - Align DE values to Calculated Insight
- Align email to data points

Drive Actions - Data Schema

Data Cloud

Unified Individual
- Unified Individual Id
- Bank Link
- First Name
- Bank Name
- Deposit Amount
- Account Number

Unified Link Individual (Type: Bridge)
- Unified Individual Id
- Individual ID
- Data Source Object

Unified Link Contact Point Email (Type: Bridge)
- Unified Contact Point Email Id
- Contact Point Email Id

Unified Link Contact Point Email (Type: Derived)
- Unified Contact Point Email Id
- Email Address

Marketing Cloud

Journey Data Extension
- SubscriberKey (Primary Key)
- EmailAddress
- First Name
- Bank Name
- Depost Amount

Recap

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Questions?

Thank You!