



Pardot Butter and Chocolate: Bringing your Salesforce Ecosystem Data into Marketing Cloud Intelligence



Aaron Stayman
Marketing Analytics Program
Manager, Sercante

Thanks To Our Incredible Sponsors

SERCANTE
A Trilliad Company



TRILLIAD
A Growth Services Provider

stensul

storylane


Trailblazer
COMMUNITY

 **AuctusIQ**

**JU
ST**

SANDLER

Things to know...



Genius Bar

FREE Salesforce Support

ALL WEEK



Workshop Day

\$499 All-Access pass

THURSDAY

10:00am – 4:00pm ET



Session Recordings

available 24 hours
after the event end

About You

1. Do you currently use Salesforce Marketing Cloud Intelligence?

Options: Yes/No

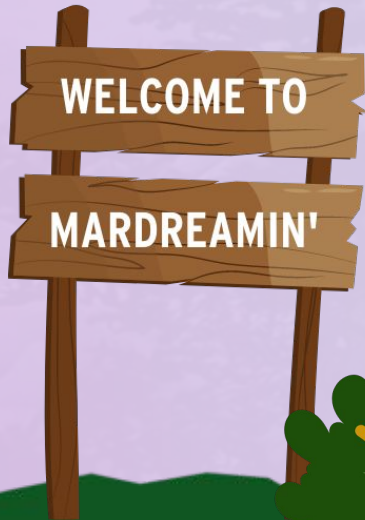
2. What Salesforce tools would you want to bring into an analytics tool like Marketing Cloud Intelligence?

Options: Sales Cloud, Marketing Cloud Engagement, Marketing Cloud Account Engagement, Commerce Cloud, Data Cloud, Other



Agenda

- Marketing Cloud Intelligence overview
- Salesforce tools that interact with MCI
- Best Practices for data ingestion

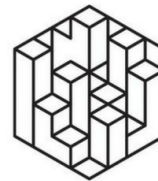


Aaron and MCI

- In Datorama/MCI platform since 2018
- Part of Salesforce following Datorama acquisition through 2023 in customer success
- Certified MCI partner since 2023
- Salesforce Marketing Champion



+

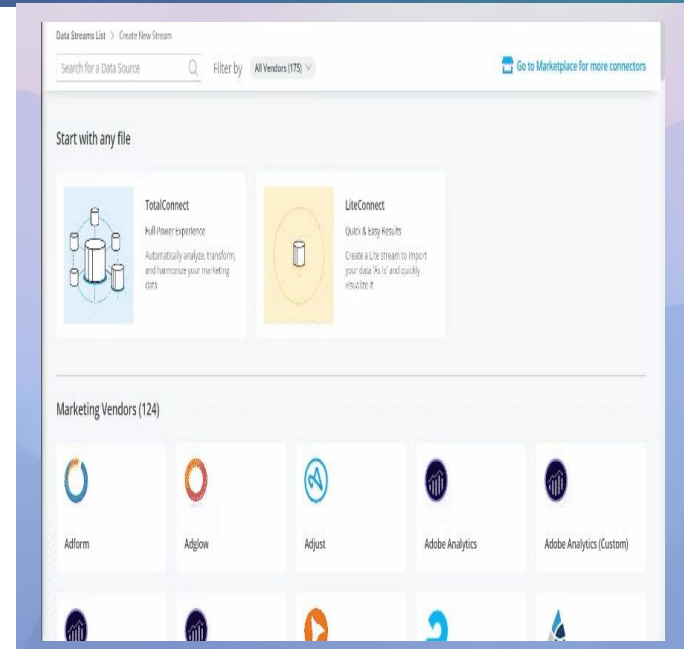


Marketing Cloud Intelligence Basics



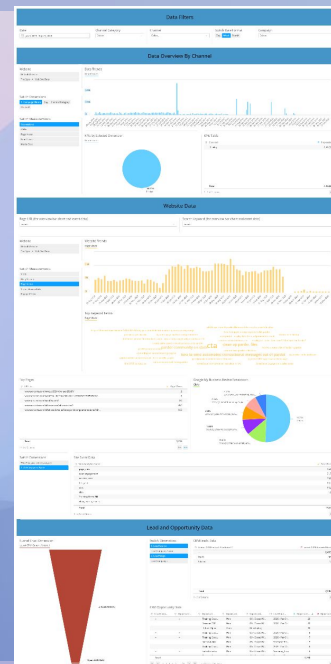
Marketing Cloud Intelligence: In Brief

- A tool completely built for marketers by marketers
- Over 125 different connections to data sources
- Models exist natively to make your data flow smoothly
- Ingestion, reporting, and visualization components
- Interacts smoothly with the Salesforce ecosystem



What's with the Session Name?

- Peanut butter and chocolate-old school Datorama jargon for our combination of data sources
- Salesforce data is often an untapped potential in MCI
- We want to open your eyes to a delicious possibility



The Marketing Cloud Intelligence Data Model

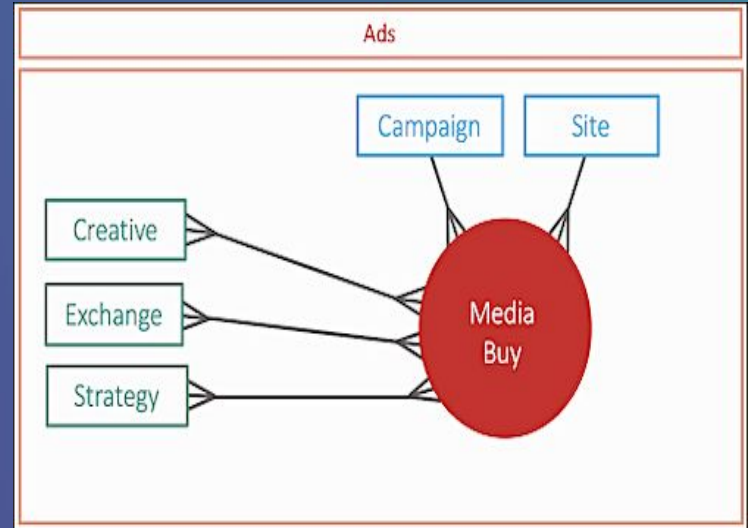
Marketing Cloud Intelligence's data model process uses AI to match your uploaded data to pre-built (and custom) data stream types

- All datastream types are marketing centric while providing flexibility beyond that framework.
- Various data models can be seen to the right. The most frequently used types are Ads and Conversions.
- Generic data types allow you to create data models within whatever framework suits your data, but can be difficult to join to other data points.



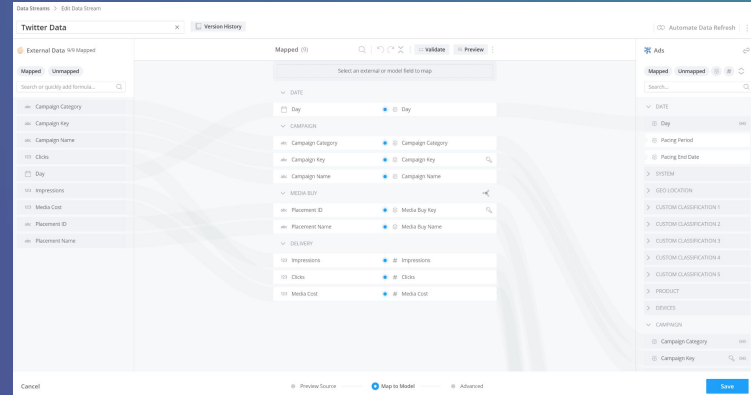
Most Common Data Stream Type: Ads Data

- Ads data streams are centered around media buys and their associated keys (campaign, site, creative, exchange, strategy)-as you can see, the media buy key is the core of this model.
- Ads data stream metrics tend to center around clicks, impressions, and costs associated with ads, though the platform has a great deal of flexibility in associating metrics with data.



The Output

- Data goes in, comes out in plain language
- Dashboards are easy to build across data sets
- Multiple data sets can even feed one data model with minimal tweaking



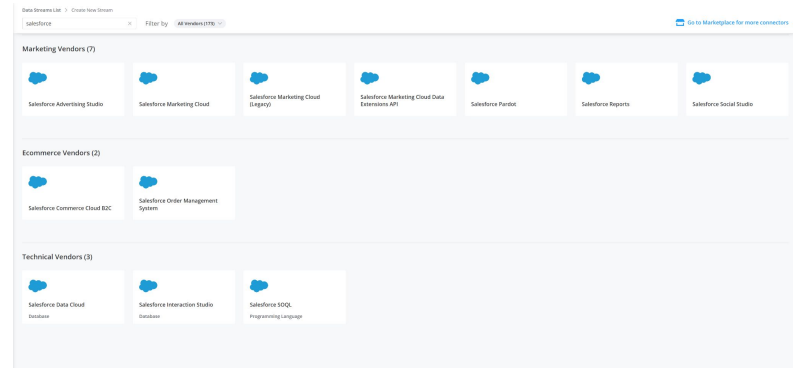
The background features a soft-focus illustration of mountains in shades of blue and purple. In the bottom-left corner, there is a small cluster of green plants with yellow flowers. On the right side, a large, semi-transparent smartphone is shown with a white cursor arrow pointing towards the center of the screen.

Marketing Cloud Intelligence Salesforce Connectors

Where do Salesforce Connectors fit in?

So many users want to bring Salesforce data together. You can do that with the following tools in MCI:

- Marketing Cloud Engagement
- Marketing Cloud Account Engagement
- Sales Cloud Reporting
- Commerce Cloud
- Marketing Cloud Advertising
- Marketing Cloud Personalization
- Data Cloud

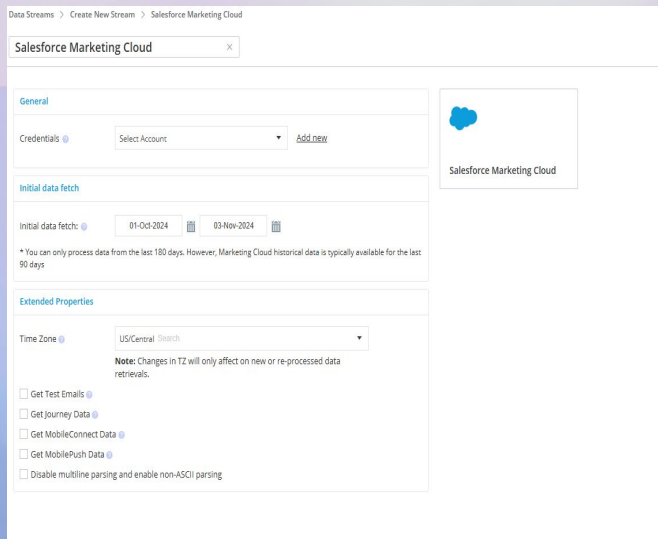


Out of the Box Connectors



Marketing Cloud Engagement: Messaging Made Easy

- This is one of the easiest connectors to bring into MCI from the Salesforce toolkit
- You can choose to add test, journey, MobileConnect, and MobilePush data in addition to standard data sets
- Once connected, data is mapped by default into the messaging data model
 - You cannot change this stream's data model type
- With a separate connector, you can also bring in data extensions



The screenshot shows the configuration page for a new Data Stream named "Salesforce Marketing Cloud". The breadcrumb trail is "Data Streams > Create New Stream > Salesforce Marketing Cloud". The page is divided into several sections:

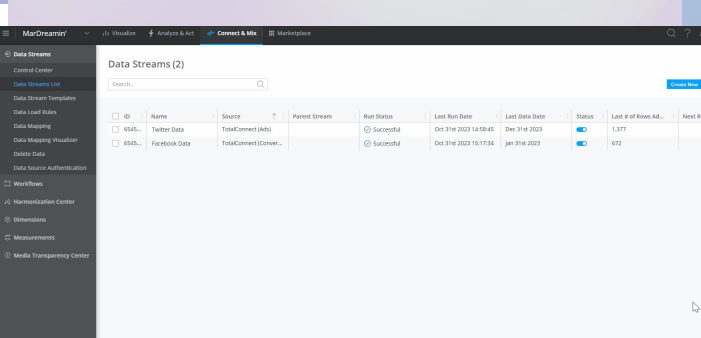
- General:** Includes a "Credentials" section with a "Select Account" dropdown and an "Add new" link.
- Initial data fetch:** Shows "Initial data fetch" with date pickers for "01-Oct-2024" and "03-Nov-2024". A note below states: "* You can only process data from the last 180 days. However, Marketing Cloud historical data is typically available for the last 90 days".
- Extended Properties:** Includes a "Time Zone" dropdown set to "US/Central". A note below states: "Note: Changes in TZ will only affect on new or re-processed data retrievals." Below this are several checkboxes:
 - Get Test Emails
 - Get Journey Data
 - Get MobileConnect Data
 - Get MobilePush Data
 - Disable multiline parsing and enable non-ASCII parsing

On the right side of the configuration area, there is a "Salesforce Marketing Cloud" connector icon and label.

Marketing Cloud Email Application

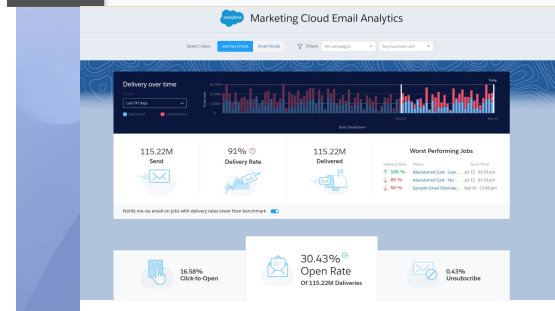
An application with pre-built dashboard and a workaround if your connector for MCE fails to install

- Go to the platform's marketplace
- Select "Go to Market"
- Search "email"
- Install the Salesforce Marketing Cloud Email Connector
- Enter your credentials and save data settings
- When setup is complete, you'll have a complete and full of data data stream



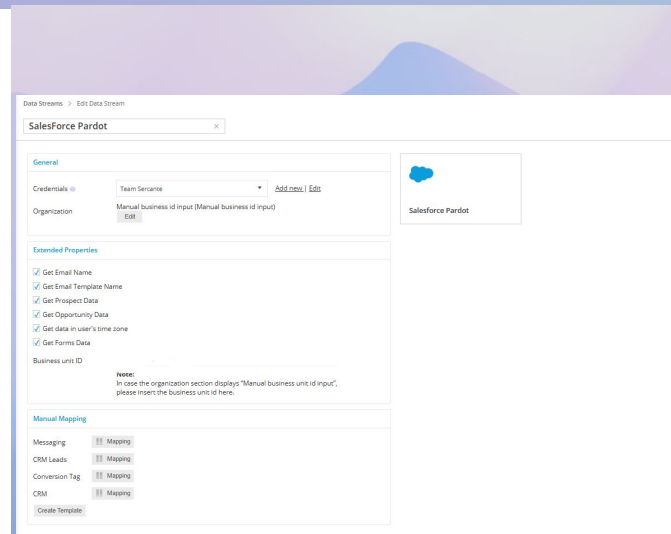
The screenshot shows the 'Data Streams (2)' interface in the MARDREAMIN' application. It features a search bar and a table with the following columns: ID, Name, Source, Parent Stream, Run Status, Last Run Date, Last Data Date, Status, Last # of Rows Ad., and Next Run. Two data streams are listed:

ID	Name	Source	Parent Stream	Run Status	Last Run Date	Last Data Date	Status	Last # of Rows Ad.	Next Run
6545...	Twitter Data	TotalConnect (AMB)		Successful	Oct 31st 2023 14:58:43	Dec 31st 2023	On	1,377	
6545...	Facebook Data	TotalConnect (Conver...)		Successful	Oct 31st 2023 15:17:34	Jan 31st 2023	On	672	



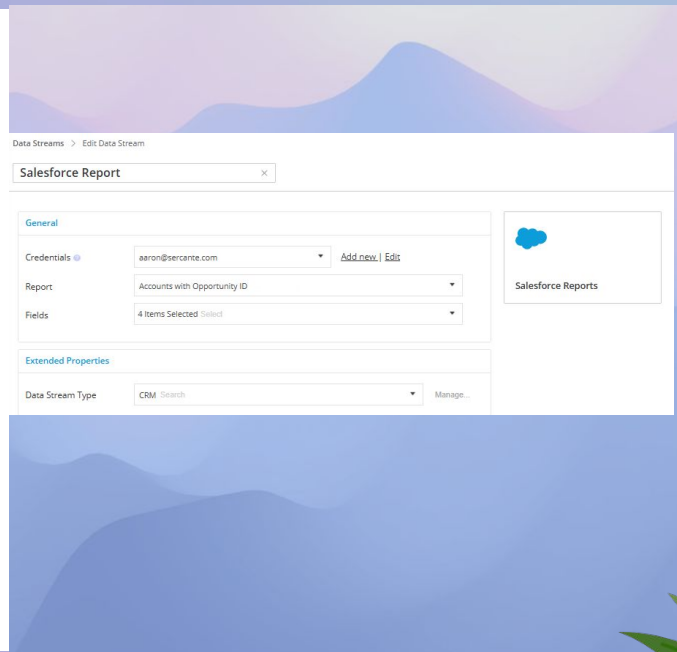
Marketing Cloud Account Engagement

- There is an out of the box connector to MCAE in MCI
 - Like many connectors in platform, it still has the legacy name (Pardot)
- The connector is robust-it can provide data for so many pieces of data...but there are drawbacks
- Data is broken out into Messaging (email), CRM/CRM Leads (prospects/opportunities), and Conversion Tag (form fills) data models
- The biggest challenge: lack of customization in data model usage



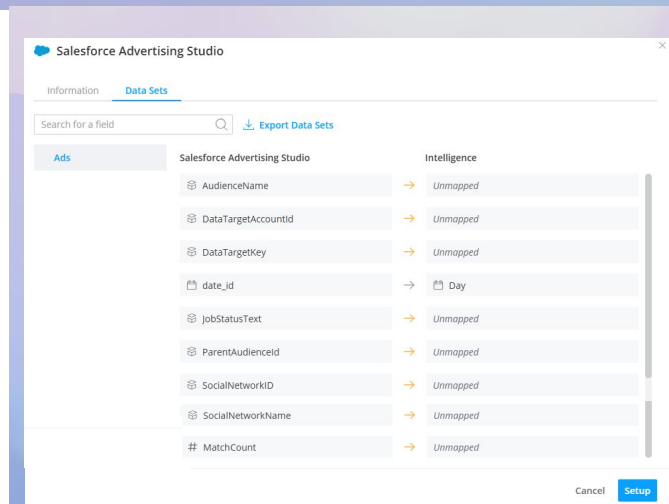
Salesforce Reports

- You can import any Salesforce report in your Salesforce instance
- All reports available to you as a user and any fields desired can come in
- Data Stream types (Ads, CRM, etc) are all available to choose from, which adds freeform nature to mapping
- Big caveat: no more than 2,000 rows can ever be brought in per report



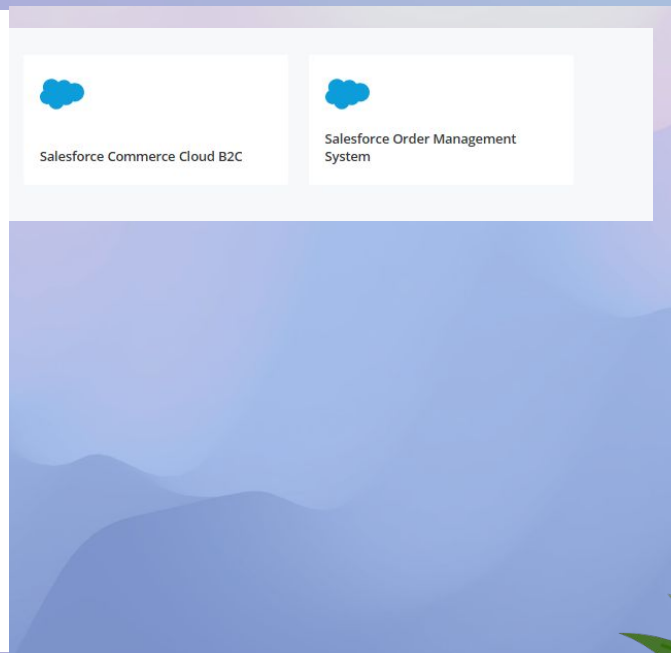
Marketing Cloud Advertising

- As expected, data is meant to be associated with the ads data model
- Brings in a small set of data from MC Advertising
- Not one of our most heavily integrated data sources, but useful if you need the information associated
- You can change model types as desired



Salesforce Commerce Cloud

- Two connectors: B2C and Salesforce Order Management System
 - Both have similar data sets and tie to Ecommerce data model
 - Some extra permissions are required to use the OMS connector
- As with so many other Salesforce connectors, you cannot change the data model associated

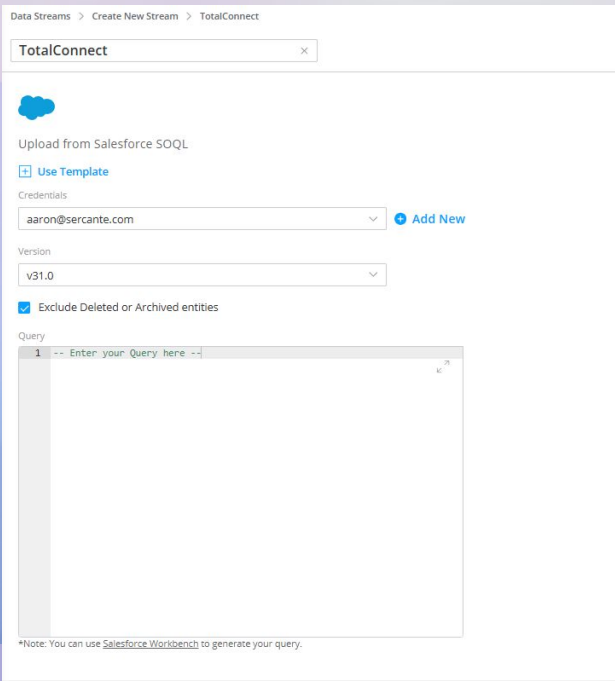


Technical Connectors



For MCAE and Sales Cloud Data: Salesforce Object Query Language

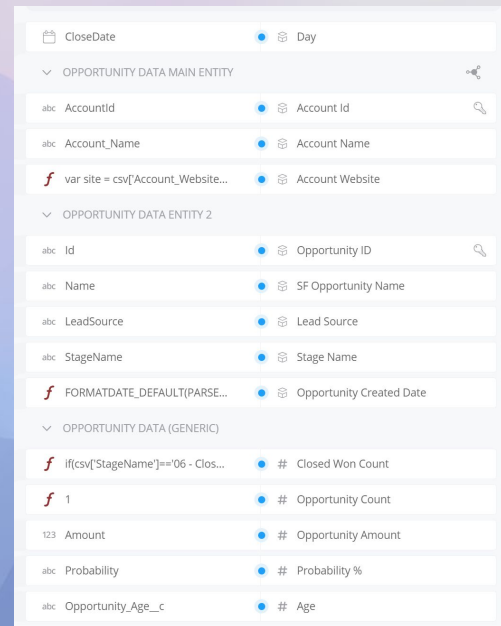
- Technical Vendor in the platform-no preset modeling/mapping
- As long as you can type a query in SOQL (which is easier than it sounds!) you can get data equivalent to the MCAE and Salesforce Reports connectors but with freeform models and more data
- My tips:
 - Set the version to 59.0, and use this query for any object to see what you can bring in:
 - **Select** fields(all) **From** [object API Name ie. lead] **limit** 10
 - Use this to create an initial file and update the select statement to match those fields and remove the limit going forward



The screenshot shows the configuration page for a Data Stream named 'TotalConnect'. The breadcrumb trail is 'Data Streams > Create New Stream > TotalConnect'. The stream name 'TotalConnect' is displayed in a search box. Below this, there is a blue cloud icon and the text 'Upload from Salesforce SOQL'. A 'Use Template' button is visible. The 'Credentials' field contains 'aaron@sercante.com' with an 'Add New' button. The 'Version' dropdown is set to 'v31.0'. A checkbox labeled 'Exclude Deleted or Archived entities' is checked. Below these fields is a 'Query' editor with a text area containing the placeholder text '-- Enter your Query here --'. At the bottom, a note states: '*Note: You can use [Salesforce Workbench](#) to generate your query.'

Recommended Setup: Generic Data Model

- The CRM data model in platform exists out of the box, but should be noted for the challenge of querying data across time
- Generic data model allows you to modify and specify your own needs outside of a very tight data model
 - You lose some of the ability to see progression of stages to some degree, but there are ways around this
- You can read more [on Salesforce Help](#) on CRM data sets



Entity	Field	Field Type
CloseDate	Day	Day
OPPORTUNITY DATA MAIN ENTITY		
abc AccountId	Account Id	Account Id
abc Account_Name	Account Name	Account Name
f var site = csv[Account_Website...	Account Website	Account Website
OPPORTUNITY DATA ENTITY 2		
abc Id	Opportunity ID	Opportunity ID
abc Name	SF Opportunity Name	SF Opportunity Name
abc LeadSource	Lead Source	Lead Source
abc StageName	Stage Name	Stage Name
f FORMATDATE_DEFAULT(PARSE...	Opportunity Created Date	Opportunity Created Date
OPPORTUNITY DATA (GENERIC)		
f If(csv[StageName]='06 - Clos...	# Closed Won Count	# Closed Won Count
f 1	# Opportunity Count	# Opportunity Count
123 Amount	# Opportunity Amount	# Opportunity Amount
abc Probability	# Probability %	# Probability %
abc Opportunity_Age_c	# Age	# Age

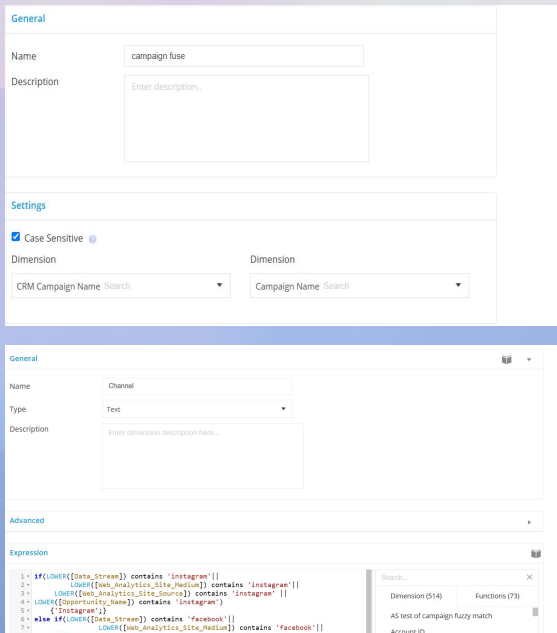
Salesforce Data Configurations

Data Fusions:

- Need to query, for example, campaigns across Salesforce and Paid Media

Calculated Dimensions and Measurements:

- Dimensions to calculate: Channel/lead source and other common points
- Measurements: Costs from Salesforce data and Paid Media APIs



General

Name: campaign fuse

Description: Enter description...

Settings

Case Sensitive

Dimension: CRM Campaign Name Search

Dimension: Campaign Name Search

General

Name: Channel

Type: Text

Description: Enter dimension description here...

Advanced

Expression

```

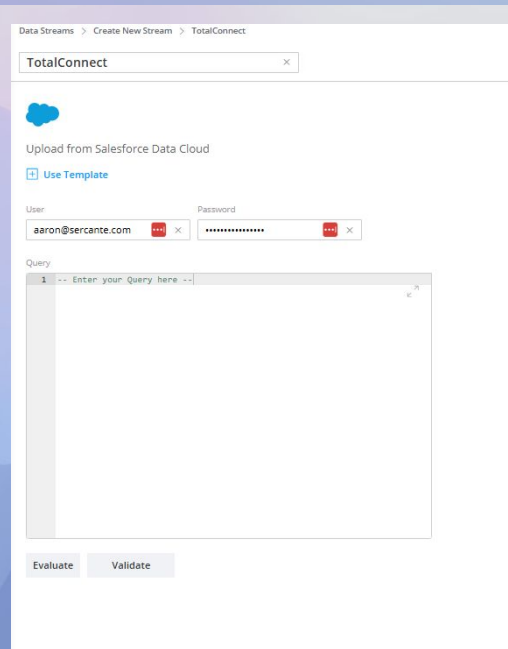
1: IF(LOWER([Data_Stream]) CONTAINS "Instagram" ||
2:   LOWER([Web_Analytics_Site_Medium]) CONTAINS "Instagram" ||
3:   LOWER([Web_Analytics_Site_Source]) CONTAINS "Instagram" ||
4:   LOWER([Opportunity_Name]) CONTAINS "Instagram")
5:   {Instagram}
6: ELSE IF(LOWER([Data_Stream]) CONTAINS "facebook" ||
7:   LOWER([Web_Analytics_Site_Medium]) CONTAINS "facebook" ||

```

Search: Dimension (5/4) Functions (7/3)
AS test of campaign fuzzy match
Account ID

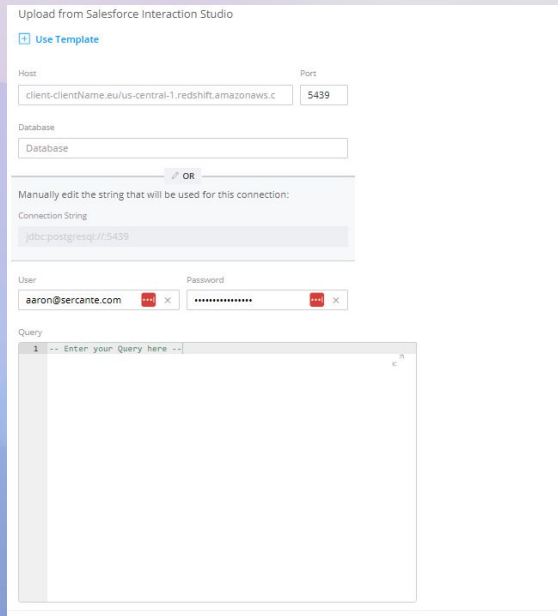
Salesforce Data Cloud

- Reading the [Salesforce Help page](#) is a must at setup
- As noted previously, this is a technical vendor-data brought in is freeform
- The upshot on this data stream type is the ability to harmonize data in Data Cloud and ingest easily into MCI
- Note that SSO is not currently a connection option for Data Cloud in MCI



Marketing Cloud Personalization

- Like SOQL and Data Cloud, this is a technical vendor
- Another legacy name: listed under Interaction Studio
- There are numerous steps to setup queries to succeed-check the [Salesforce Help page](#) for more information.
- Once you do initial setup, you can query data sets using the “Query” box in platform



Upload from Salesforce Interaction Studio

[Use Template](#)

Host: Port:

Database:

OR

Manually edit the string that will be used for this connection:

Connection String:

User: Password:

Query:

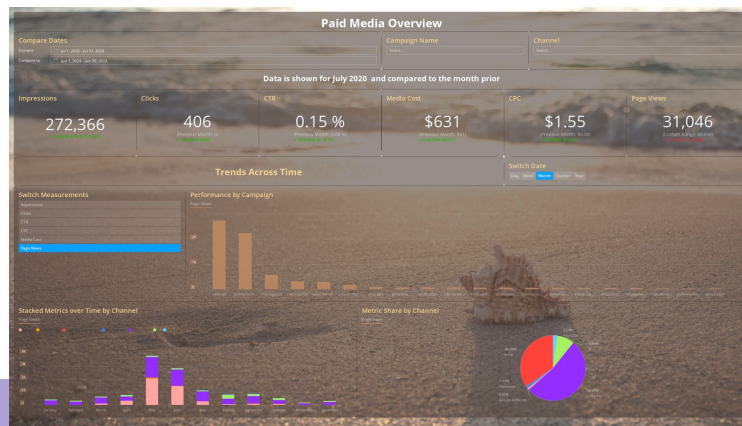


Takeaways



What to know

- Salesforce and MCI: Better together, with many flavors!
- Use SOQL when you can
- Generic data sets are your friend for Sales Cloud data
- If you're looking for a full-funnel marketing story with easy integrations across your datasets, MCI is your tool!



Questions



Thank You!

