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

MARDREAMIN'

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Things to know...

MARDREAMIN'

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

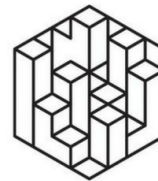- Salesforce tools that interact with MCI

- Best Practices for data ingestion
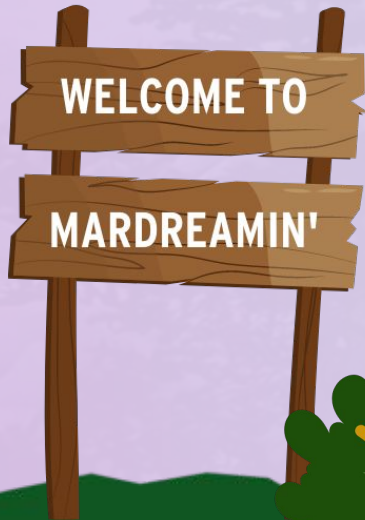
Aaron and MCI

- 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
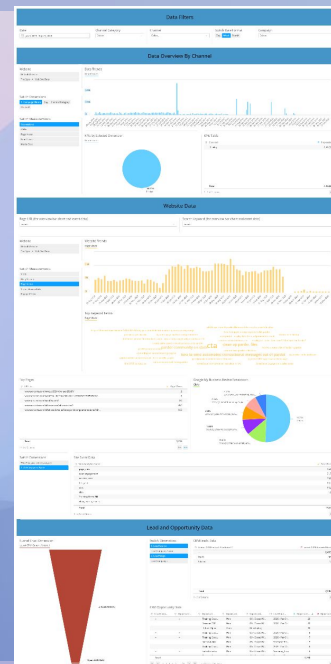
Marketing Cloud Intelligence Basics

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
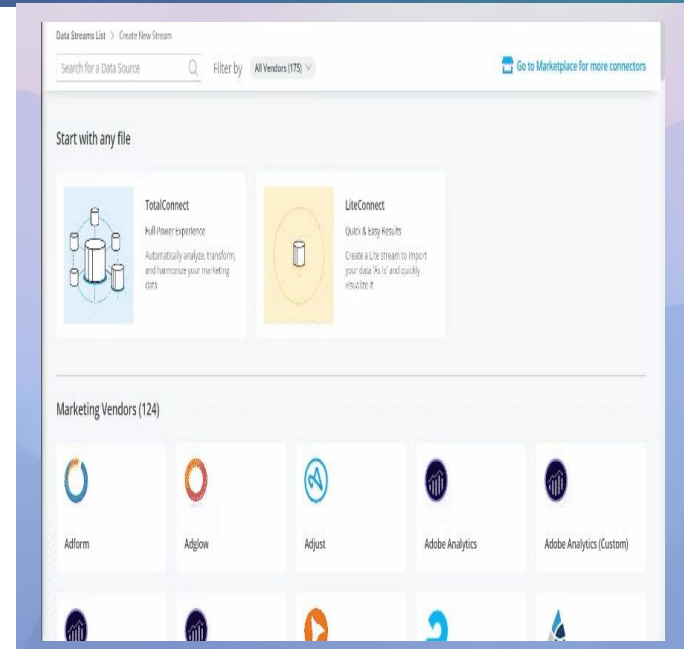
What's with the Session Name?

- 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.
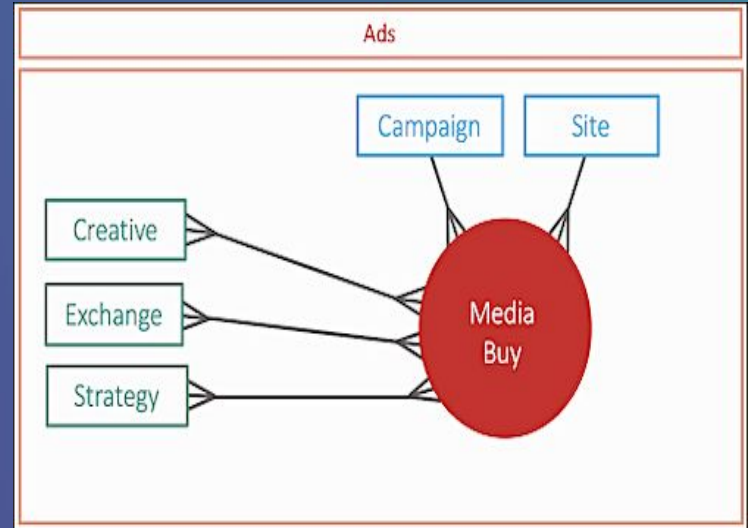
The Output

- 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
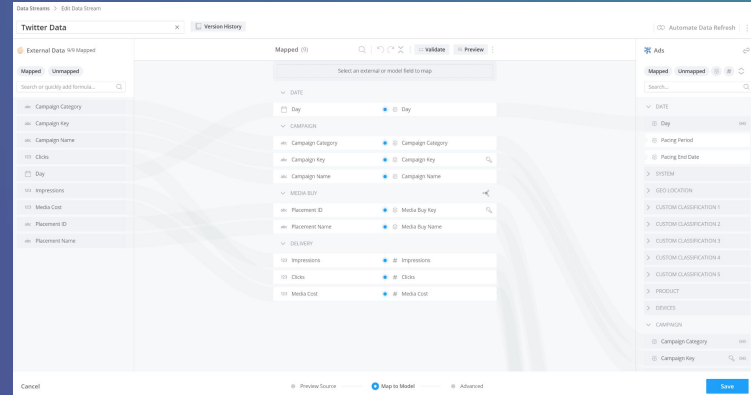
Marketing Cloud Intelligence Salesforce Connectors

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
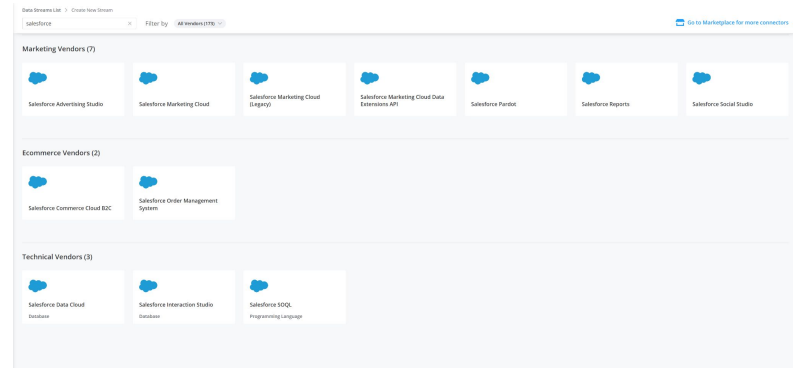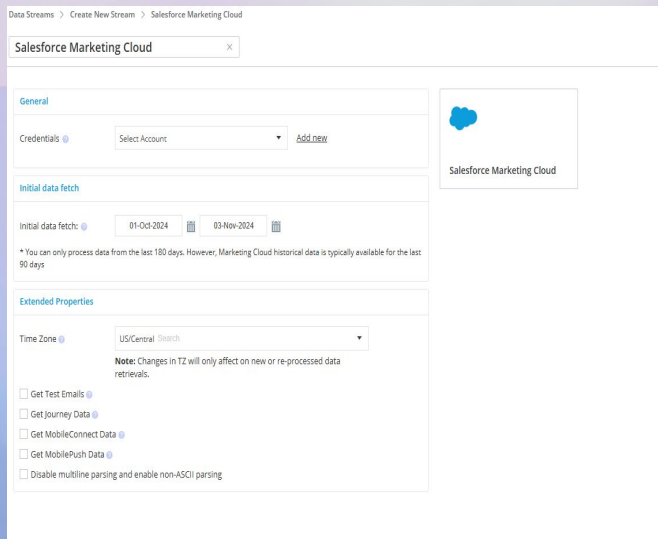
Out of the Box Connectors

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

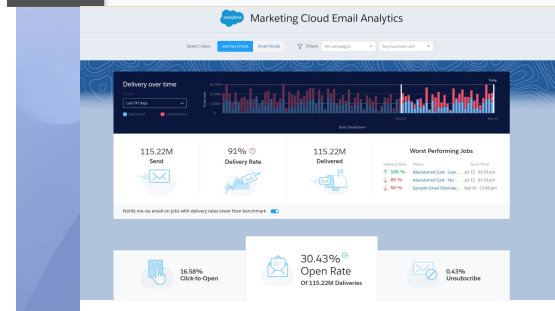# Marketing Cloud Email Application

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

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
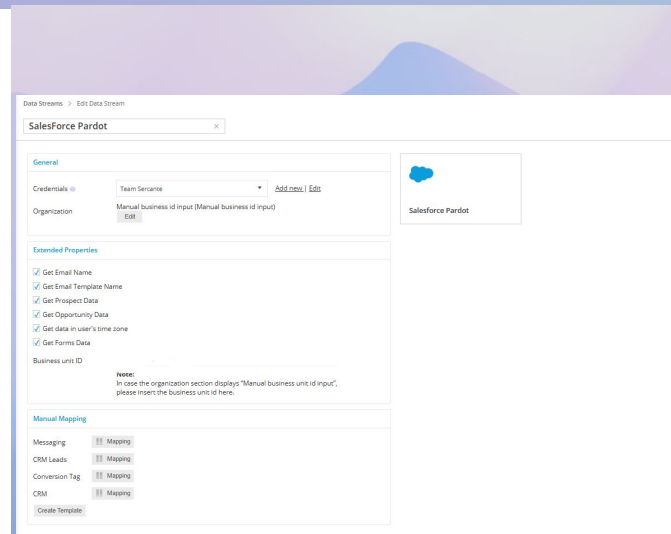
Salesforce Reports

- 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
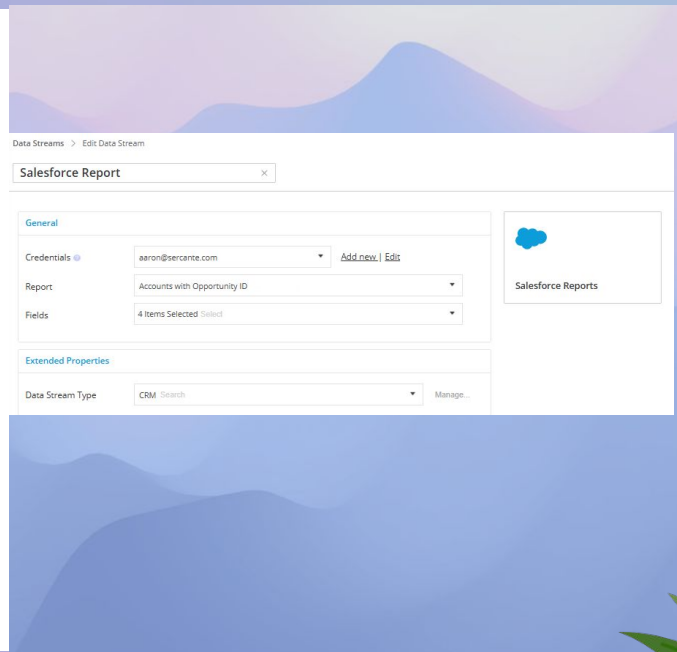
Marketing Cloud Advertising

- 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
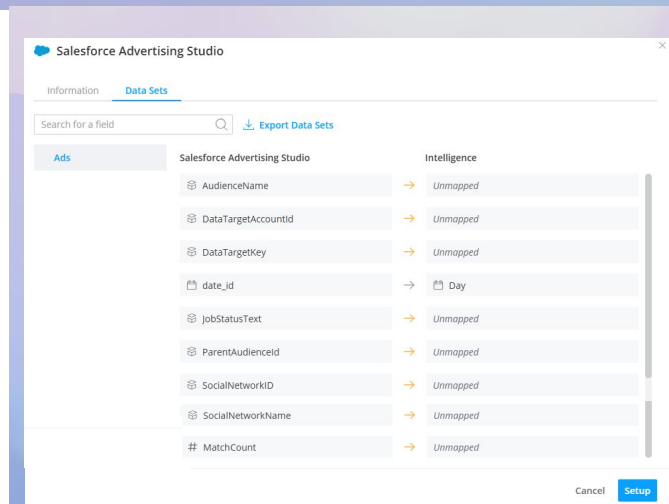
Salesforce Commerce Cloud

- 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
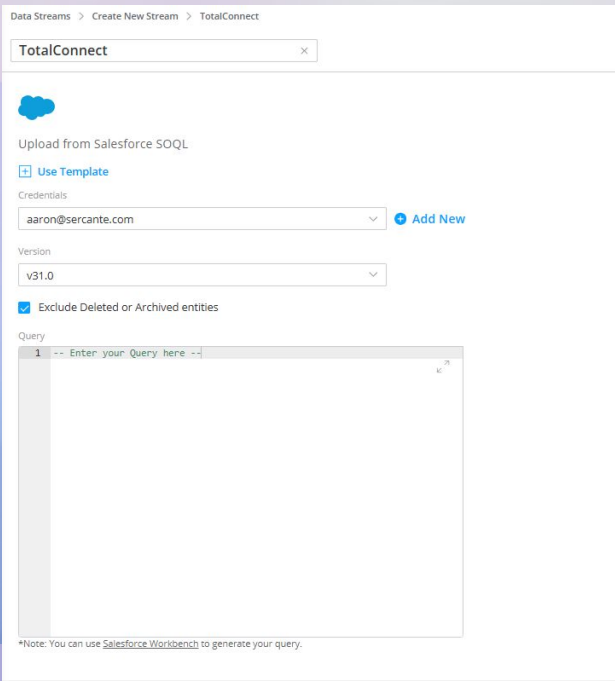- As with so many other Salesforce connectors, you cannot change the data model associated

Salesforce Commerce Cloud B2C

Salesforce Order Management System
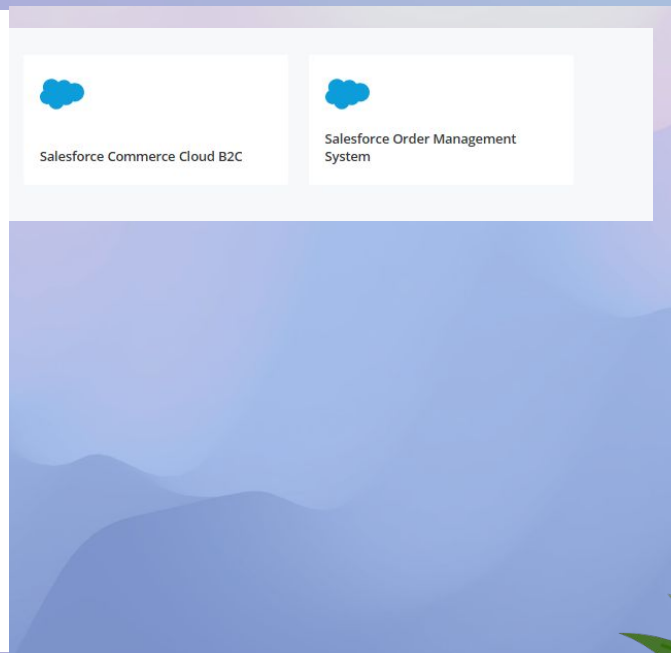
Technical Connectors

For MCAE and Sales Cloud Data: Salesforce Object Query Language
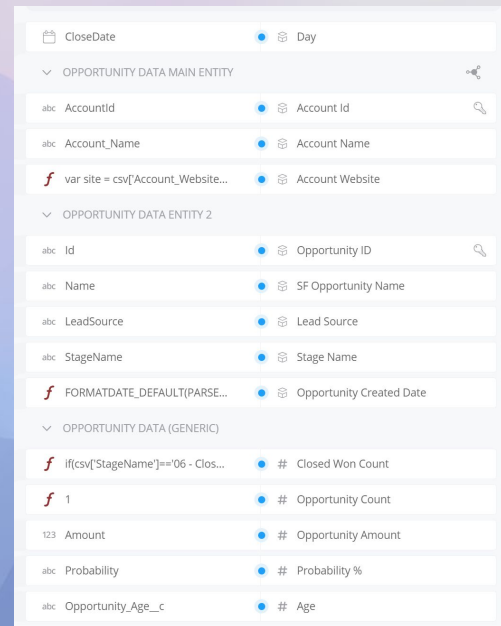
- Technical Vendor in the platform-no preset modeling/mapping
- As long as you can type a query in SOQL (which is easier than it sounds!) you can get data equivalent to the MCAE and Salesforce Reports connectors but with freeform models and more data
- My tips:
  - Set the version to 59.0, and use this 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

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
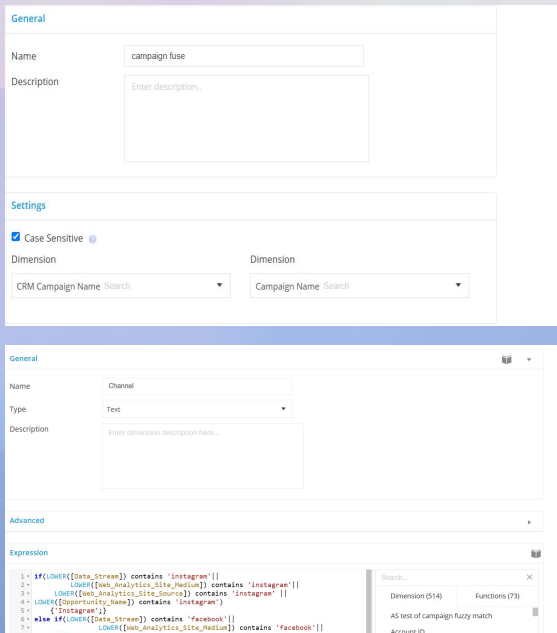- You can read more on Salesforce Help on CRM data sets

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
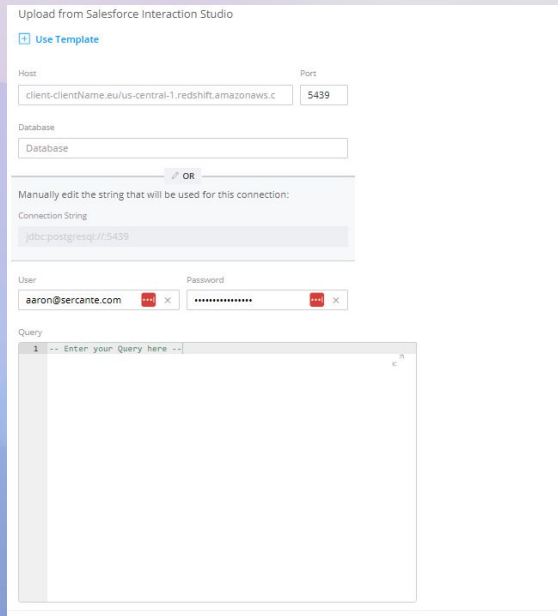- Measurements: Costs from Salesforce data and Paid Media APIs

Salesforce Data Cloud

- Reading the <u>Salesforce Help page</u> 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
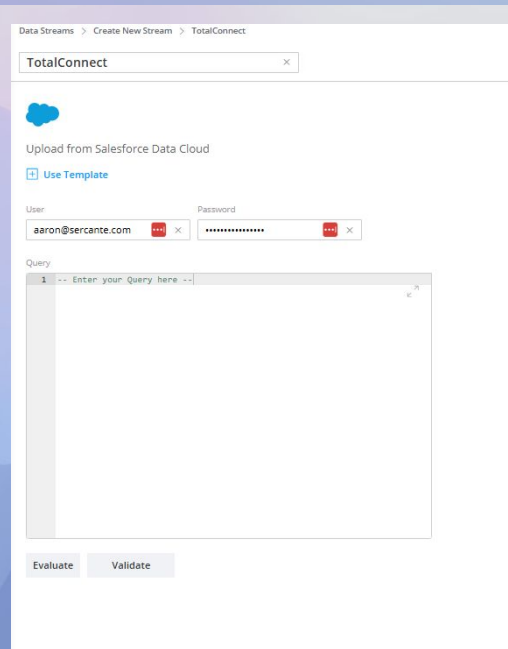
Marketing Cloud Personalization

- 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
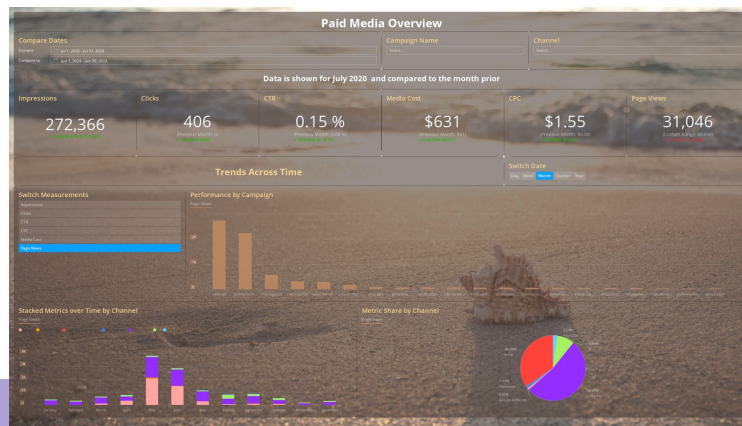
Takeaways

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!