

MARKETING CLOUD CONNECT ESSENTIALS



OVERVIEW

The Marketing Cloud Connect Essentials course is designed to give you in-depth knowledge of the functionality available when you connect your Salesforce org to your Marketing Cloud account. In this interactive course, you will gain hands-on experience connecting the Clouds, personalizing your emails by leveraging your Salesforce CRM data from the Sales / Service Clouds, sending emails to a Contact / Lead, Report, or Campaign, synchronizing your Salesforce CRM data in the Marketing Cloud, segmenting your data to send targeted and relevant emails, creating 1:1 journeys based on your Salesforce CRM data, and tracking and reporting capabilities in the Marketing Cloud and Sales / Service Clouds.

WHO SHOULD TAKE THIS COURSE?

This course is designed for:

- Customers who will be connecting their Salesforce org to the Marketing Cloud using Marketing Cloud Connect.
- The email digital marketer who will manage the email channel for their organization and who needs to know how to best leverage their Salesforce CRM data.
- The Salesforce Administrator who is responsible for supporting users when Marketing Cloud Connect is installed.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Explain Marketing Cloud Connect.
- Connect a Marketing Cloud account to a Salesforce org.
- Create individualized content blocks to leverage Salesforce CRM data using personalization strings and dynamic content.
- Create an email in Content Builder.
- Utilize the various sending methods to send to a Lead, Contact, Report, or Campaign in the Marketing Cloud and Sales/Service Clouds.
- Automate the sending of emails using a Triggered Email, Automation Studio, and Journey Builder.
- Configure Synchronized CRM Sources to bring CRM data into the Marketing Cloud.
- Segment data using Reports, Filter Activity, and Query Activity.
- Create journeys using Salesforce Activities in Journey Builder.
- Review tracking data in the Marketing Cloud and Sales / Service Clouds.
- Create analytics reports in the Marketing Cloud.
- Create and customize Marketing Cloud reports in a Sales / Service Clouds.
- Create a dashboard based on Marketing Cloud reports.



DURATION

- 4 days

DELIVERY FORMAT

- Classroom
- Virtual Classroom

AUDIENCE

Marketing Cloud Users,
Consultants, and/or
Partners, Salesforce
Administrators

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MODULES & TOPICS

Salesforce Marketing Cloud Overview

- Overview of the Customer Success Platform
- Overview of the Marketing Cloud

Marketing Cloud Connect

- Marketing Cloud Connect Overview
- Review of various ways to connect the Clouds

Connecting the Clouds

- Review of steps to connect the Clouds
- Review of the pre-requisites for Marketing Cloud Connect
- Review of Salesforce terminology
- Connect a Marketing Cloud account to a Salesforce org
- Review of pre-work

Personalized Digital Marketing

- Review of what functionality can be accomplished in each cloud
- Create a personalized email leveraging Salesforce CRM data using Content Builder
- How to use Testing Tools
- How to manually send a Marketing Cloud Email to a Lead/ Contact, Report, and Campaign
- How to automate the sending of an email via a Triggered Email, Automation Studio, and Journey Builder
- Understand what happens when an email is sent
- Understand subscriber statuses

Synchronized CRM Data

- Explain how and why to bring Salesforce CRM data into the Marketing Cloud
- How to synchronize data sources in Contact Builder
- How to create segments using Filters and the Query Activity
- How to create a Salesforce Data Extension for sending
- How to create a journey using synchronized data sources
- How to test a journey

Journey Builder

- Explain each of the Sales and Service Cloud Activities
- How to create a journey using Sales and Service Cloud Activities

Tracking and Reporting

- Understand the tracking data available in the Marketing Cloud
- How to create and automate tracking reports in the Marketing Cloud
- Understand the tracking data available in the Sales / Service Cloud
- How to create and customize Marketing Cloud reports in the Sales / Service Cloud
- How to create a dashboard for Marketing Cloud tracking reports

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