Step-by-step Guide for Segmentation and Activation

Introduction to Segmentation

Segmentation in Data Cloud allows you to enhance and define your audiences with data. You will be able to create a customized strategy by gaining a deep understanding of specific populations within Data Cloud. Together, we will walk through the step-by-step process for segmenting your data and then activating it.

Segmentation is the act of identifying customers that align with common data characteristics and behaviors. These criteria can be based on demographics, purchase history, or any desired data attribute.

Activation is the process of publishing a segment to activation platforms. Once segments are created to help you better understand, target, and analyze your customers, you can publish a segment to an activation target. Activation Targets are used to store authentication and authorization information for your desired platform. You can activate your segment on a schedule or on-demand, depending on your needs.

Segmentation and Activation strengthens your marketing strategy enabling you to create data-driven personalized campaigns for high-return areas. By targeting customers, the customers will have a positive experience, and your marketing team will be more efficient with their marketing spend.

Technical Benefits of Segmentation and Activation

Segmentation and Activation in Salesforce Data Cloud allows you to select specific criteria in your data sets, which can be as complex as needed and then activate the data set to the platform where it needs to be leveraged. Segmentation in Data Cloud can be created in multiple ways depending on your team's technical abilities, for example: no-code using UI Segment Builder or DBT (created via API). Segments can reveal insights into the composition of data within a segment, which might help you identify issues such as skewed data, including placeholder values. You can use calculated insights to create multidimensional metrics to take your segments to the next level. Salesforce Data Cloud includes straightforward out-of-the-box ways to activate your Segments and share them to activation platforms such as other marketing services, data lakes, or SFTP. Data Cloud allows you to create micro-segments based on customer behavior, demographics, preferences, and interactions across channels.

Key Technical Features:

- **Enables Dynamic Segmentation** using real-time data and AI-powered insights.
- **Supports Multi-Dimensional Segmentation** using criteria from structured (e.g., CRM) and unstructured (e.g., social media) data sources.
- **Segments are scalable**, and capable of handling growing business needs and data volume.
- **Update segments** as customer behaviors or attributes change, ensuring relevancy.

- **Leverages Einstein AI** for predictive segmentation, allowing marketers and sales teams to anticipate customer needs and behaviors.
- **Identifies High-Value or At-Risk Customers** through predictive models, enabling proactive engagement.
- **Automates Segment Creation and Activation Workflows**, reducing manual effort and human error.
- **Enables real-time triggers** for personalized messaging based on customer actions (e.g., abandoned carts, website visits, etc.).
- **Speeds Up Audience Identification and Activation** with pre-built templates and Einstein Segments.
- **Faster Time to Market** with reduced time required to create, test, and launch segmented campaigns.

Steps to Build a Segment in Data Cloud
Now that we understand the key concepts of segmentation and activation, let's break them down step by step.

1. Create a Segment on a Profile DMO
2. Set your publish schedule and lookback period
3. Define the attributes (common criteria) of your Segment
4. Create an Activation Target or use an existing Activation Target
5. Create a Data Cloud Activation for your Segment
6. Publish your Segment

With our understanding of Data Cloud Segmentation and Activation, let's look at a specific example of each of these key steps.

Step 1: Create your Segment and Publish Schedule
To create a Segment in Salesforce, you first need to determine the common criteria which you will use to build your Segment. Let's consider an example with a hotel, Sunshine Trails Hospitality. Sunshine Trails aims to target high-value customers who have interacted with their marketing campaigns in the last quarter. Let's walk through this scenario of how Sunshine Trails could create a segment and activate it.

Review the different types of Segments:

- **Standard Segments**: This is the Segment you will use most frequently as it is based on the Data Model Object you select. You can also simplify the process of creating this via an Agent, using Einstein Segments.
- **Waterfall Segments**: Help you prioritize Marketing Campaigns. Use this Segment if you have a campaign with multiple offers.
- **Real-Time Segments**: Allows you to access data quickly and meet demands for real-time data graphs. There are limits to Real-Time Segments refer here for more information.

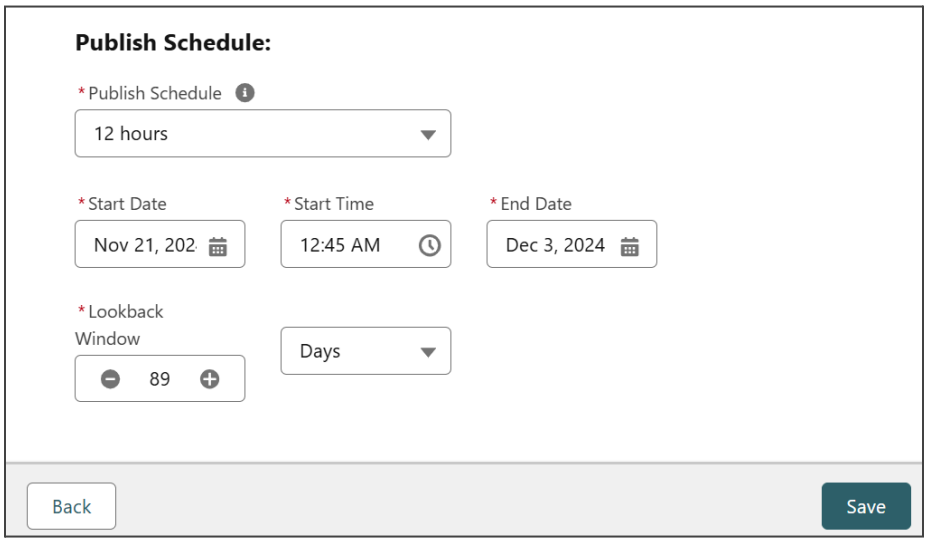
- **API Segments**: In case the customer wants to create segments from an external system. For example, a Tableau customer can utilize Tableau to create a visualization and create a segment out of it.

Before you begin to Segment your data, make sure your data has been consolidated and cleaned. The great news is this should be completed before you ingest your data!

To create a Segment,

1. In Data Cloud, click the **Segments** tab and click **New**.
2. Select Use a **Visual Builder**, select **Standard Segment**, and click **Next**.
3. Enter the segment details, and click **Next**.
4. You will determine your Publish Schedule, this is how often the Segment will be pushed to activation targets.

With Standard Publish, you can define the lookback period to use up to the last 2 years of engagement data in segmentation rules. With Rapid Publish, you can use up to the last 7 days of engagement data in segmentation rules and publish to Marketing Cloud only.



5. If you selected Standard Publish, set your Lockback Period. The default Lookback Period is 90 days but you can select a lookback of up to 2 years.

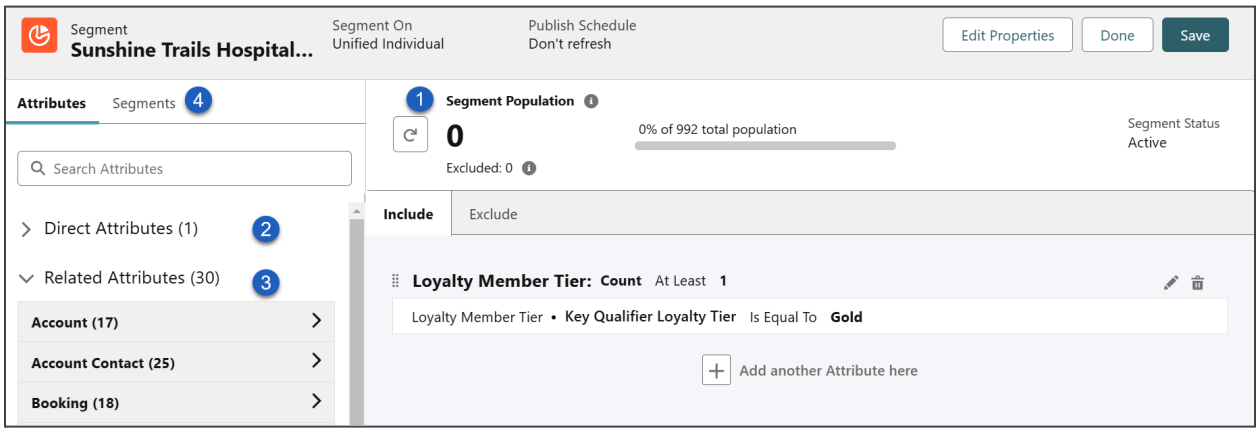
   Note: You can raise a request with Salesforce to increase the lookback period beyond the 2 years. An analysis will be performed to confirm if it is feasible to increase the lookback period.
6. Click **Save**.

Step 2: Define your Segment

After creating your Segment, you will be brought to the Visual Builder where you can define your Segment using specifying criteria or conditions that a record must meet. The Visual Builder can be broken down into 4 key areas:

1. Segment Population – the total count that matches the criteria you assigned

2. Direct Attributes – directly related to the Segment On Data Model Object
3. Related Attributes – has a connected relationship with the Segment On Data Model Object (DMO).
4. Segment tab – to include a segment inside another segment.



The Segment can easily be updated with Salesforce's easy-to-use drag-and-drop feature allowing you to define your Segment. Notice that there are two tabs: **Include** and **Exclude**. Drag and drop your Attributes into these categories to define your Segment. Once you drag an attribute into the Visual Builder, you will notice that you have the ability to define this attribute further.

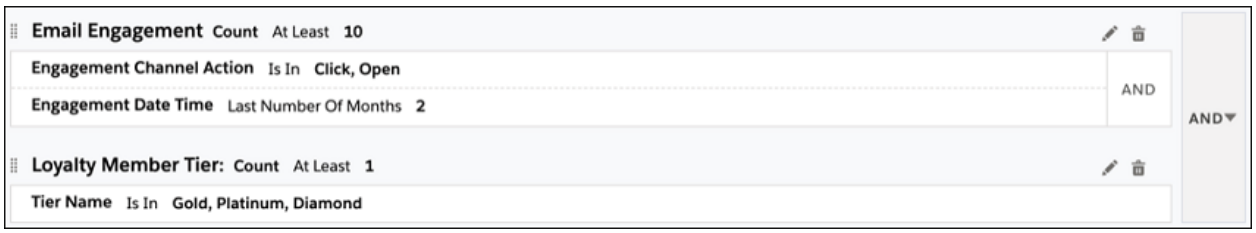
Returning to our Sunshine Trails example, we want to add the attributes to our Segment for the high-value customers in the Gold, Platinum, or Diamond Loyalty Tier who have opened at least 10 emails in the past 2 months. Let's define our segment.

1. Open the desired Segment, you will see Direct and Related Attributes and expand the Related Attributes.
    a. Direct Attributes—Each DMO being segmented on has only one data point such as postal code or first name.
    b. Related Attributes—Each DMO being segmented on has multiple data points such as purchases, product characteristics, or email events.
2. For attributes you want to include in your Segment, click and drag the desired attributes to the **Include** tab in Visual Builder.

When Defining your Segment, you will be able to filter on all of your data in Data Cloud, this includes structured and structured data! This powerful feature can be helpful if you need to create filters for unstructured data such as product descriptions or Case summaries.

3. Add Aggregation as needed. For our example, we will add a Count Aggregation to ensure that at only one of the Loyalty Member Tier criteria needs to be met. Refer to the Help Article: Aggregation for more information.

4. Add Containers as needed. Containers are created when you define a filter using a related attribute. Refer to the Help Article: Filtering Using Containers for more information.



5. For attributes you want to exclude in your Segment, click and drag the desired attributes to the **Exclude** tab in Visual Builder. Excluding allows you to remove any customer that meets these criteria.
6. You can also add Logic Interactions such as AND and OR between rules. For our example, we want the specific Loyalty Member Tier and Email Engagement so we add AND between our rules.
   Note: You can also nest these operators together.
7. Click **Save**.

When working with Segment Attributes, there are several important areas of best practices that we want to highlight. For more information on Segmentation rules best practices refer here.

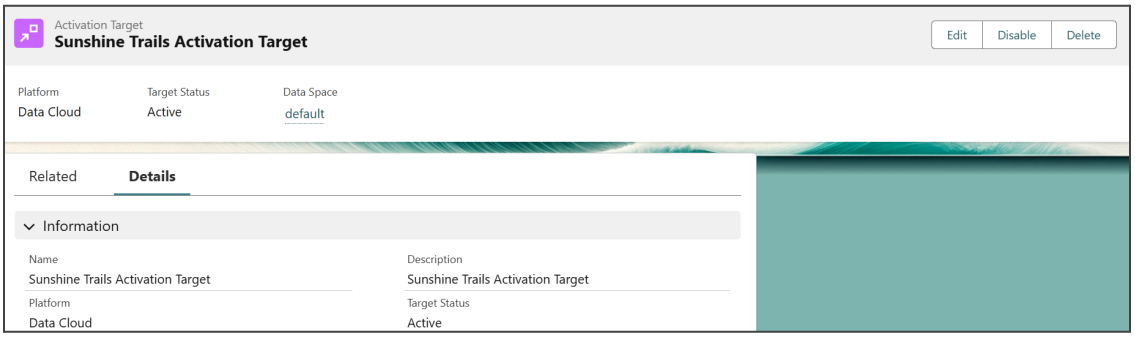
Segmentation Rules Best Practices
• Define your Audience - Identifying the audience is critical to ensure that your Segment meets your needs.
• Data Filters - Can be used to create Segments based on customer engagement with your company. This engagement can be based on engagement with text messages, email or campaigns. You can explore several examples of Data Filters in the Help Article: Segmentation Filter Examples.
• Containers - Merge containers that reference the same Data Model Object as this will limit the amount of data processed.
• Nested Segments - Allow you to re-use criteria across multiple segments to save time and maintain consistency.

You have now successfully updated the Segment Attributes, and the Segment Population is updated to reflect the number. You can see the percentage of the total population of your Salesforce org and the number of excluded customers from your Segment.

You can use Calculated Insights in Segmentation to define criteria using metrics, dimensions, and filters. For Calculated Insights to appear in Segments, if you are segmenting on a Unified Individual.

Step 3: Create a Data Cloud Activation Target

Next, identify an Activation Target, or the location where you want to send your segmentation data. For our example, we want to send the Sunshine Trails information to Marketing Cloud. Activation Targets can also be created for Amazon S3, and Ad Services.



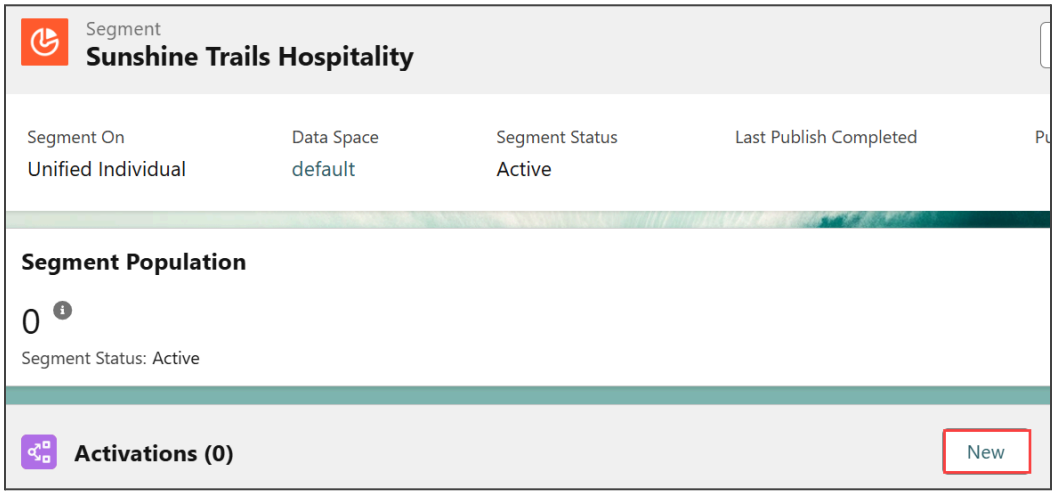
Activation Targets can quickly be set up in Salesforce in the **Activation Targets** tab by clicking the **New** button. Then, simply add a recognizable name and select the data space. Activation Targets can be for Data Cloud, Data Cloud (Loyalty), or External Platforms. Refer here to view all available Activation Targets.

Each data space can have only one Data Cloud Loyalty Activation Target.

Step 4: Create a Data Cloud Activation for a Segment

Let's combine our Data Cloud Activation Target and our Segment to start sending data to an External Platform. To do so follow these steps:

1. Navigate to your desired Segment
2. In Activations, click **New**.



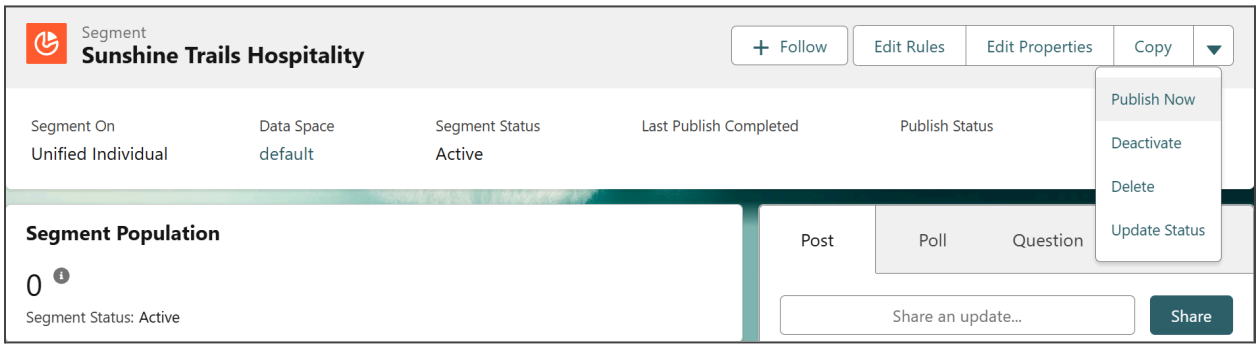
3. Select your desired Activation Target.
4. Select an object from Activation Membership and click **Continue**.
5. Map each data model attribute to its partner field, and click **Save**.

6. For each contact point mapped, you will want to select the maximum number of attributes and sort the attribute values.
7. Click **Next**.
8. Name your Activation and add a description.
9. Click **Save**.

Step 5: Publish a Segment in Data Cloud

After creating and defining the Segment, you can open your Segment and easily Publish it. This will allow the Segment to push to Activation Targets. The amount of time it takes to publish the segment depends on your volume and activation target. You can publish your segment or use the publish schedule you set when creating the Segment. If you need to update the publish schedule, you can click the **Edit Properties** button.

1. Navigate to your desired Segment.
2. On the segment details page, to have the activation target pick up the segment, click the dropdown menu and select **Publish Now**.



Making Data-Drive Decisions

After activating your segment, you can then use your Data Cloud segment for a marketing campaign. You are transforming the raw data into a useful segment that helps you to understand your customers. It is important to monitor your segment with Data Cloud to ensure that if your target customer changes you are able to make the necessary adjustments. You can design dashboards to track your engagement to ensure continuous improvement of your segmentation.

Best Practices for Segmentation

Common Discovery Questions	Design Considerations
• Focus on gathering details about current and future marketing campaigns, including their goals, channels, systems used, and audience size.	• Use nested segments; there are 2 options depending on your use case: use the last published membership option as a remedy if you have lots of rules, or use rules option if not.

• Description of active campaigns and their objectives.	• Choose your schedule accordingly (standard or rapid) to your use case, the trade-off is less data processed when rapid. Use flow to orchestrate publishes outside of schedule options available in the UI
• Inquire about inactive campaigns and upcoming campaigns.	• Use the shortest path to the object
• Request sample segmentation criteria for active campaigns.	• Merge containers if you are using criteria from the same object
	• Set the right look back on engagement data according to your use case to exact utilization of data to save costs In the absence of a lookback filter Data Cloud automatically looks back to two years
	• Deactivate & delete Segments when not used for good hygiene
	• Validate if the segments are valid If not, deactivate/pause Validate if too many rows or zero rows are returned
	• Use approximate counts optionally for faster counts
	• Use Calculated insights in segmentation for complex ruling

Best Practices for Activation

Design Considerations

• Activation schedules are tied to segment publish schedules. Set the right schedule
  ○ Use flow to orchestrate publishes outside of schedule options available in the UI
  ○ Use the shortest path for related attributes

• Use multi-dimensional Calculated insights instead of creating multiple ones

• Use the shortest path to objects
• Deactivate segments published when they aren't being used
• Full vs Incremental refresh on activation to Marketing Cloud
• Validate that the activations are valid, pause/delete those that are not - as activations act on top of segments, pausing/deleting activations linked to segments with zero members is the easiest course of action

Conclusion

The power of segmentation in Salesforce Data Cloud is evident for defining, targeting, and understanding customer populations, and for activating these insights in your marketing campaigns. By leveraging Segmentation and Activation, you can achieve data-driven marketing decisions that yield high returns. Remember, the key to successful segmentation lies in the continuous monitoring and adjustment of your segments as your target customer evolves.

Resources

Salesforce Help: Segmentation in Data Cloud
Salesforce Help: Activation in Data Cloud
Salesforce Help: Activation Targets
Trailhead: Segmentation and Activation Trailhead Module
Data Cloud Segmentation Best Practices