

Marketing Cloud Overview

99% of all Marketing Cloud projects are made up of the same 6 core steps:

1. Creating Data Extensions and linking them
2. Importing your Customer Information
3. Segmenting Your Data
4. Creating Content in Content Builder
5. Automating everything with Automation Studio and Journey Builder
6. Tracking and Reporting

Today, we'll do 2 things:

First - We'll break down the 6 steps of every Marketing Cloud project

Second - You'll see what those 6 steps look like inside of Marketing Cloud (Basically, you'll get a Marketing Cloud video tour. So watch today's video if you haven't already)

Once you're done with today, you'll know how to put together the CORE steps of any Marketing Cloud implementation or project and you'll be on track to getting the [Marketing Cloud Email Specialist](#) cert because these are the steps you'll be tested on for that cert.

But you NEED to know the CORE features of Marketing Cloud before you do anything else.

So let's talk about the 6 CORE steps of every Marketing Cloud project.

Step 1:

Creating Data Extensions and Linking Them

There are 2 places you can find and create Data Extensions:

1. Email Studio
2. Contact Builder

Basically, Data Extensions are glorified Excel Spreadsheets that hold data just like an Excel spreadsheet does in Columns and Rows.

If you've ever used Microsoft Excel, then you can learn Data Extensions easily.

Watch today's video and do this [Trailhead Module](#) to learn more about Data Extensions

Here's what a data extension looks like in Email Studio

The screenshot shows the Salesforce Email Studio interface for a Data Extension named "Resort Guests". The interface includes a navigation bar at the top with tabs for "Email", "Overview", "Content", "Subscribers", "Interactions", "A/B Testing", "Tracking", and "Admin". The "Subscribers" tab is active. Below the navigation bar, the breadcrumb path is "Data Extensions > DUMMY DATA > Resort Guests". The "Resort Guests" data extension is shown as "Available". There are tabs for "Properties", "Records", and "Tracking". The "Records" tab is selected, showing "200 Records" and "DATE LAST IMPORTED Thursday, July 15, 2021 6:17 PM by Kaelan". A "Manage Policies" button is visible. The "Fields" section shows a table with the following data:

Name	Data Type	Length	Primary Key	Nullable	Default Value
Resort ID	Text	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
First Name	Text	75	<input type="checkbox"/>	<input type="checkbox"/>	
Last Name	Text	75	<input type="checkbox"/>	<input type="checkbox"/>	
Email	EmailAddress	254	<input type="checkbox"/>	<input type="checkbox"/>	
Gender	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	
Vacation Spots	Text	75	<input type="checkbox"/>	<input type="checkbox"/>	

The "Properties" tab shows the "EXTERNAL KEY" as "80E1B872-AEFA-4512-88DC-1401CBA4D9B4". It also shows the "Created Date" as "Thursday, July 15, 2021 6:16 PM" and the "Last Modified Date" as "Thursday, July 15, 2021 6:22 PM", both by "Kaelan". The "Type" is "Standard". There are checkboxes for "USED FOR SENDING" (Yes) and "USED FOR TESTING" (No). The "SUBSCRIBER RELATIONSHIP" is "Resort ID relates to Subscribers on Subscriber Key".

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Here's what a data extension looks like in Contact Builder

Resort Guests

EXTERNAL KEY: 80E1B872-AEFA-4512-88DC-1401CBA4D9B4

CREATED: 07/16/2021 12:16 AM | MODIFIED: 07/16/2021 12:22 AM

LOCATION: DUMMY DATA Change Location

TYPE: Sendable

USED FOR SENDING: Yes | USED FOR TESTING: No

SUBSCRIBER RELATIONSHIP: Resort ID relates to subscriber on Subscriber Key

ROOT DATA: Use as root

CONTROL SETTINGS: [Edit](#) | DATA RETENTION: Turned Off

200 Records

Attributes Table:

Name	Default Value	Length	Nullable
Resort ID		50	No
First Name		75	No
Last Name		75	No
Email		254	No
Gender		50	No
Vacation Spots		75	No

Here's what the inside of a Data Extension looks like

Resort Guests Available

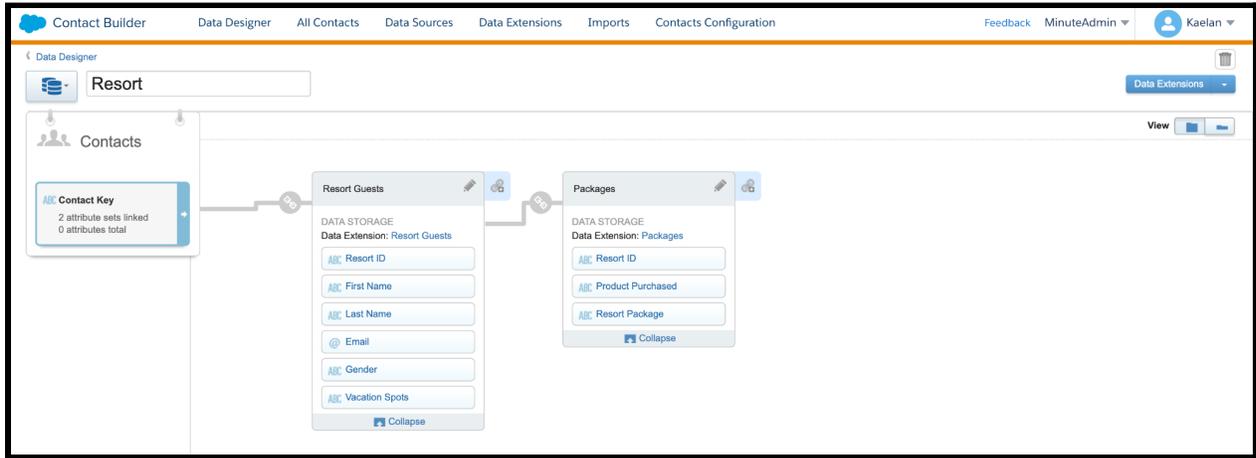
Records

Resort ID	First Name	Last Name	Email	Gender	Vacation Spots
8385896317	Eloise	Gorwood	egorwood0@favours.me	Polygender	Philippines
7444855153	Zulema	Covotto	zcovotto1@weibo.com	Bigender	Bahamas
3414283203	Rhodia	Kissack	rkissack2@sun.com	Non-binary	Bahamas
3663147347	Giraud	Baulk	gbaulk3@tinypic.com	Non-binary	Philippines
5097788639	Celka	Cattlow	ccattlow4@squarespace.com	Male	Europe
7703579017	Nikita	Cobon	ncobon5@live.com	Male	Bahamas
6871592326	Sheilah	Reddell	sreddell6@yellowpages.com	Agender	Europe
8561684038	Jania	Goldster	jgoldster7@foxnews.com	Agender	Bahamas
2448219648	Erin	Comock	ecomock8@umn.edu	Female	Bahamas
4568929156	Laurel	Roggieri	lroggieri9@gov.uk	Agender	Europe
9612286531	Leda	Fitness	lfitnessa@samsung.com	Bigender	Bahamas
9724044645	Berti	Stiegars	bstiegarsb@spotify.com	Genderfluid	Bahamas
2138232395	Allyson	Faloon	afaloonc@yale.edu	Agender	Philippines
7845224820	Seline	Dagless	sdaglessd@scientificamerican.com	Genderfluid	Bahamas
0635315971	Tatiana	Gillard	tgillarde@usa.gov	Agender	Bahamas
7093210457	Niki	Dalgarnowch	ndalgarnowchf@pcworld.com	Non-binary	Bahamas
2813768448	Wolff	Demcak	wdemcak@thejobandmail.com	Agender	Philippines
6305929939					

1 - 200 of 200 items

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Here's what 2 data extensions look like when they're linked together in something called "Data Designer"



Make sure to watch the video for today to see even more.

Step 2: **Importing Your Customer Information**

When you create a data extension, you have to put your customer information in it.

There's a specific process you have to follow in order to put customer information into a Data Extension.

But once you know the process, it's the same every time.

It'll take you literally 20 minutes to learn the process and you'll be good to go.

We won't cover that today, that's all in the course, but you understand the step now.

So that's step 2 - you have to import your customer information because without that, you don't have anyone to send messages to.

That's like having a phone without any phone numbers in it.

It's cool to have a phone, but if you don't have any numbers then you can't send any text messages or call anyone.

This is what the customer information import process looks like

Import Into Data Extension

1 Upload File 2 Configure Mapping 3 Review & Import

Data Extension Resort Guests

File location My Computer FTP

File* Compressed

Delimiter* Comma Tab Other

Date format Example: 8/23/2021 2:24 PM

Import type

Import options Skip rows in import file with bad data Respect double quotes as a text qualifier

Supported File Types

Your import must be a comma-delimited, tab-delimited, or otherwise delimited file.
If file size exceeds 20MB, you must use the FTP option.

Step 3: **Segmenting Your Customer Information**

You will need to segment your information so you can send emails to the right group of people.

Segment means filter

So you need to filter all your people into specific groups that need to get specific emails.

For example - Let's say you work for Nike and you want to send an email about winter coats to your audience....

You can send to people who specifically live in cold states in the United States like New York, Montana, Colorado, Michigan, etc...

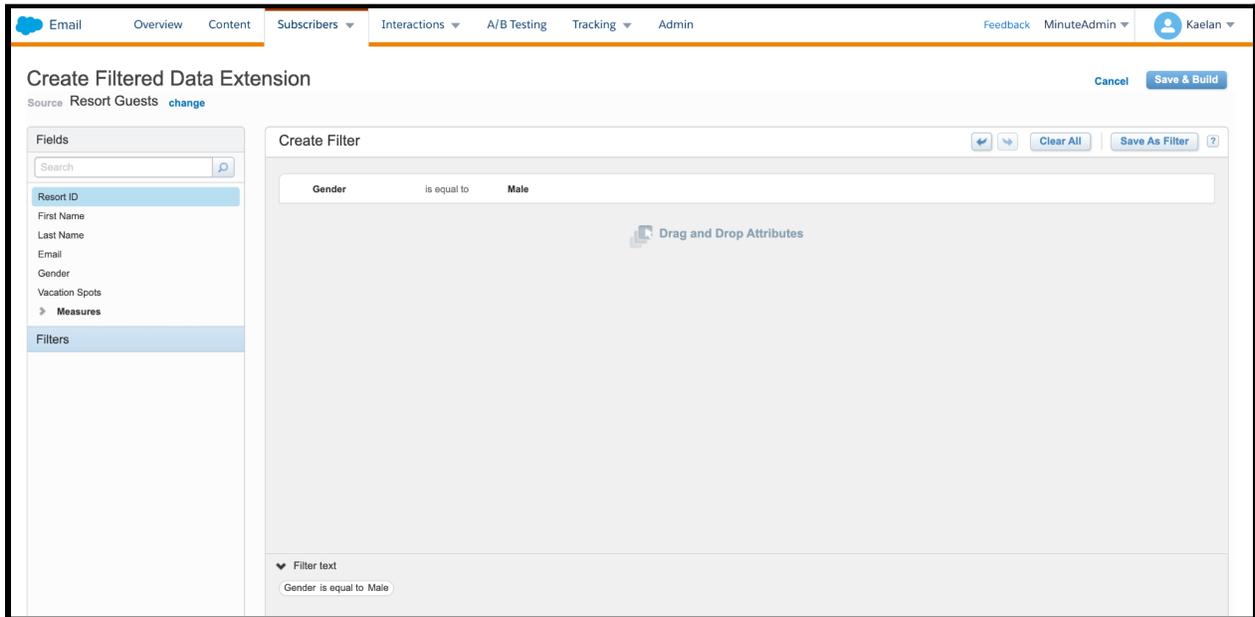
You wouldn't want to send a message about winter coats to people that live in Miami Florida or Bali Indonesia.

So you have to filter people based on the area of the country they live in so you can send the right message to the right group of people.

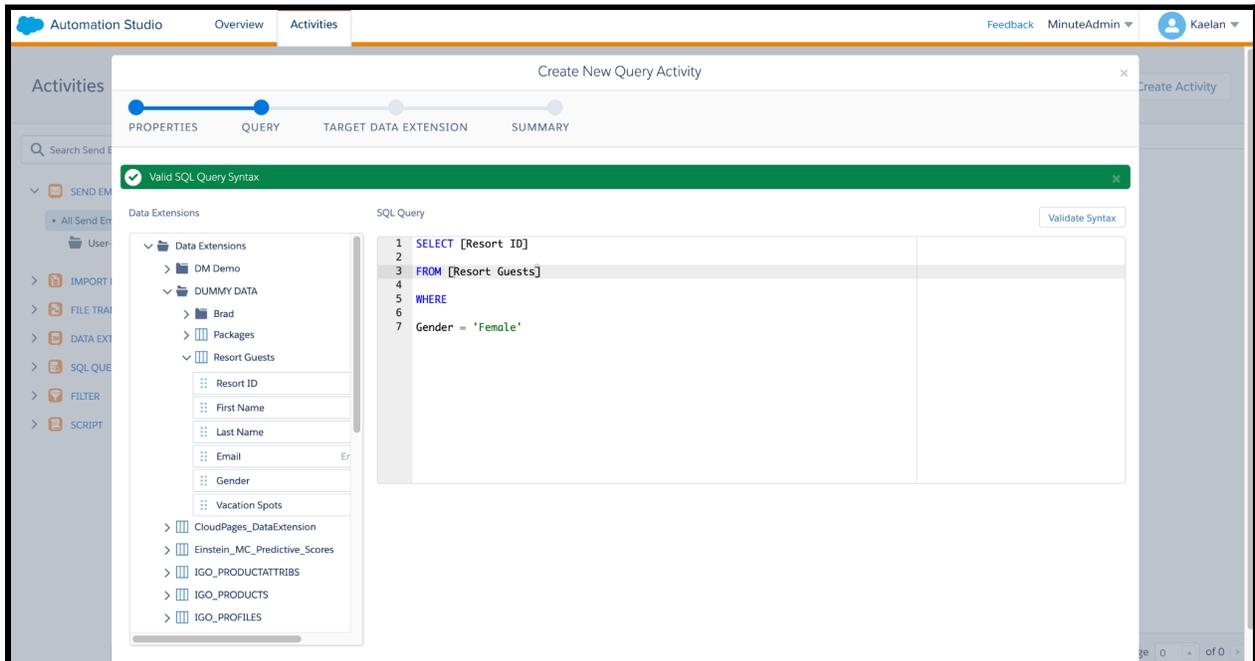
There are only 2 ways to segment people...

1. With a Data Filter (Super Easy)
2. With a SQL Query (A little harder)

This is what a Data Filter Looks Like



This is what a SQL Query Looks Like



Watch today's video and do the [Data Management Module](#) to learn more.

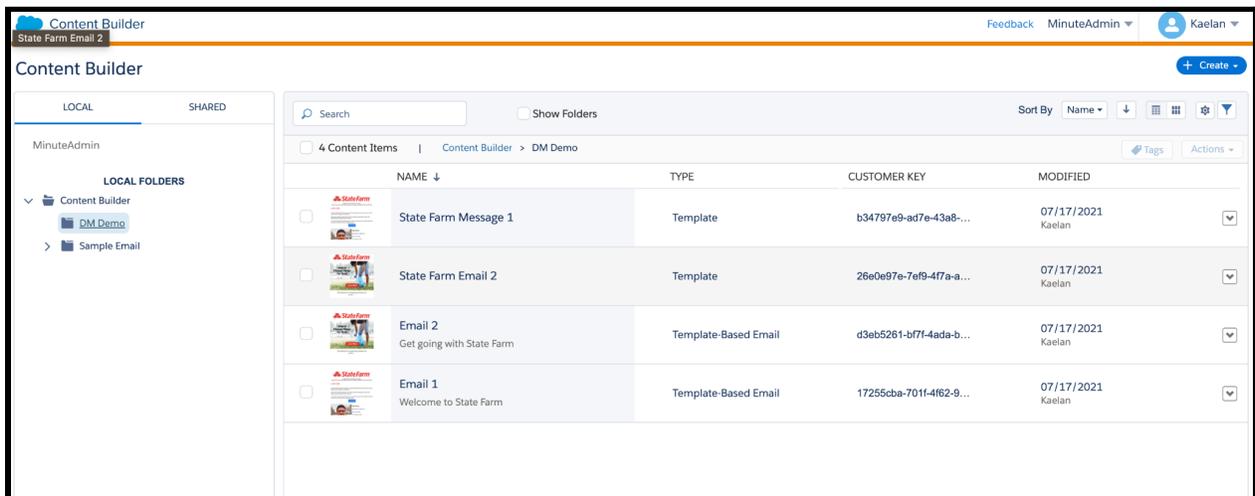
Step 4: **Creating Content In Content Builder**

When you get all your data into Marketing Cloud Data Extensions, you need to create the emails that you'll send to your subscribers.

All of your emails will be created in 1 place... it's called Content Builder

Here's a screenshot of what Content Builder looks like.

I was making a State Farm Email just for fun.



All emails are made pretty much the exact same way. Once you learn the process, you just repeat that process no matter which company you're working for.

So it doesn't matter if you work for StateFarm, Nike, United Healthcare, Sony, or any company... You'll follow the same process to create emails in Content Builder pretty much every time.

Watch today's video and do [this Trailhead Module](#) to learn more about Content Builder.

Step 5: **Automating Everything**

You can automate steps 1 through 4 from above with Automation Studio and Journey Builder so you never have to touch anything again unless you're fixing something.

The whole goal is to get to the point where you can automate everything so that the system runs itself.

When you get to that point where everything is automatic, then you can enjoy life and do more advanced stuff in Marketing Cloud. But for now, don't worry about the advanced stuff.

There are 2 ways to automate your everything in Marketing Cloud

1. Automation Studio
2. Journey Builder

Automation Studio automates your DATA... For example

1. Automate your Data Filters
2. Automate your SQL Queries
3. Automate your File Imports
4. Automate your Data Extracts

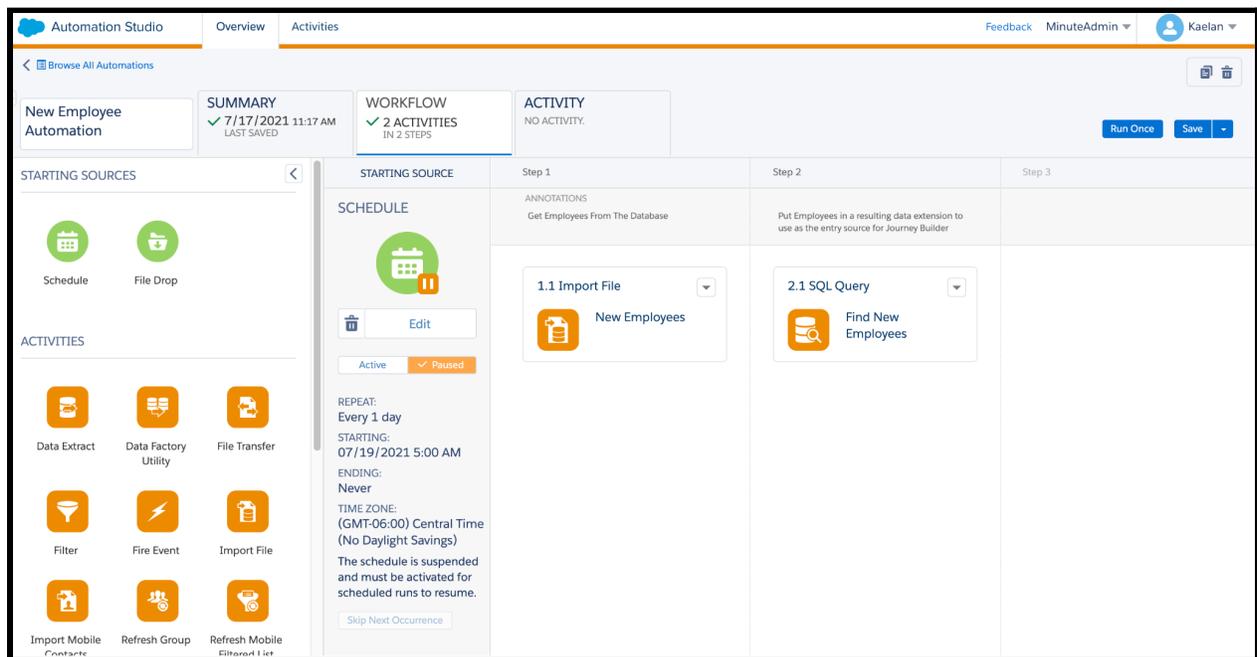
Don't worry about what these mean right now... Just know that Automation Studio automates your DATA and crunches numbers like a calculator.

Journey Builder automates your MESSAGES... For Example

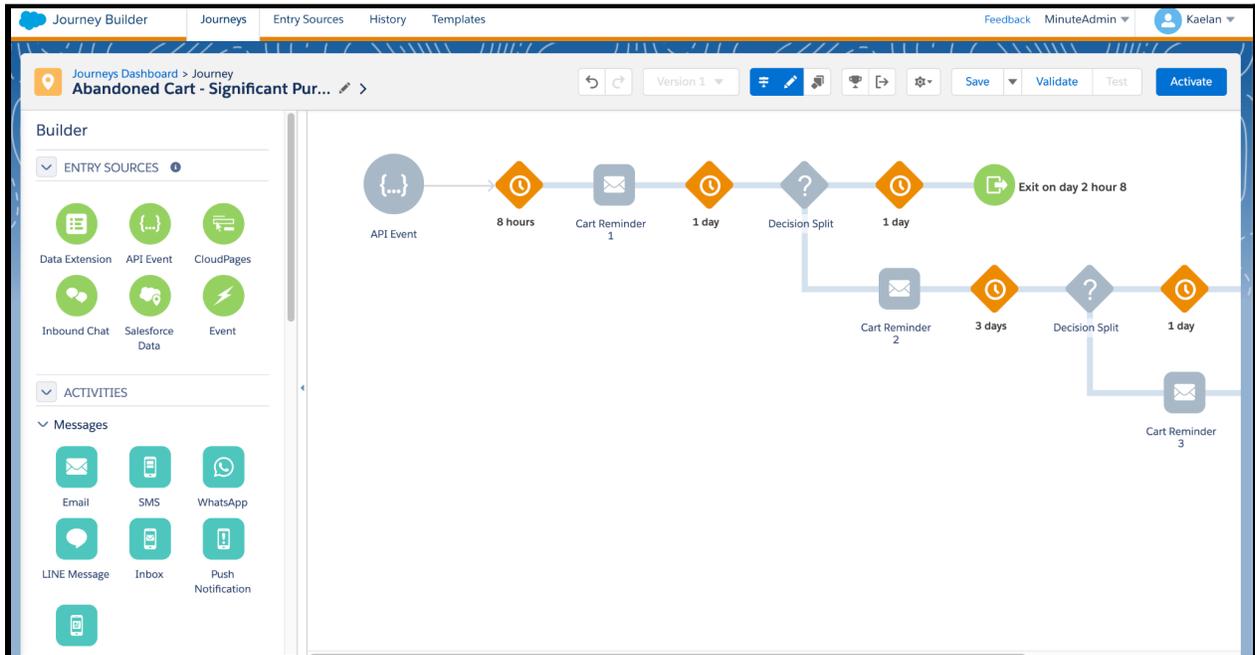
1. Automate a series of emails people get when they sign up to your newsletter.
 - a. The emails would be encouraging them to use a coupon to buy something at the store.
2. Automate a series of emails people get when they leave something in their cart on Amazon.
 - a. The emails would be encouraging them to finish their purchase

Just know that Journey Builder automates your MESSAGES customers receive in their email inbox.

Here's what an Automation Looks like in Automation Studio



Here's what a Journey Looks like in Journey Builder



Everything is drag and drop so all you need to know is where everything is at and you'll be good to go for Automation Studio and Journey Builder.

Watch the video for today and do this [Automation Studio Module](#) trail and this [Journey Builder module](#) to learn more.

Step 6: **Tracking and Reports**

After everything has been set up and automated and your messages are going out, you'll want to track to see how your emails are doing.

You will want to see if people are opening your emails or if they're unsubscribing and not reading anything.

Here are the 5 basic things ([metrics](#)) you always want to look for in every email you send.

1. Opens - (How many people **opened** your email)
2. Clicks - (How many people **clicked on links** in your email)
3. Unsubscribes - (How many people **unsubscribed** from your email list)
4. Bounces - (How many emails **did not make it** to a customer's email inbox)
5. Spam Complaints - (How many people said your email was **spam**)

Don't worry about these basic things yet because I just want you to get a feel for what most marketers look for when they send emails.

I don't want you to get into the technical weeds of things and confuse yourself. Just know that these are the 5 basic things - ([Metrics](#)) that marketers look for.

Watch today's video and do [this Trailhead module](#) to learn more about reports in Marketing Cloud.

Conclusion

That's it!

If you know these 6 steps, you can do 99% of all Marketing Cloud projects.

Obviously there's more to it than that when you do Marketing Cloud, but if you know the basic structure of every Marketing Cloud project, then you can fill in the missing details.

2 Tips

- Go back through this guide and read it again (Read this at least 3 times)
- Do the Trailhead Modules from this guide -> I also added them below

All links:

1. [Overview of Marketing Cloud](#)
2. [Marketing Cloud Email Specialist Exam Guide](#)
3. [Learn About Data Extensions](#)
4. [Marketing Cloud Data Management](#)
5. [Build Emails with Content Builder](#)
6. [Automation Studio Activities](#)
7. [Journey Builder Basics](#)
8. [Run Reports and Track Results](#)