

Salesforce - Email Essentials

Code:	EEB-101
Length:	4 days
URL:	View Online

Email Essentials is designed for marketers to design and execute email campaign within the Salesforce Marketing Cloud. In this interactive course, email marketers will gain hands-on experience on creating emails, sending and tracking your results, managing your subscriber data, segmenting your data to deliver targeted, relevant messages and discover automation tools that allow you to automate campaigns and daily tasks.

Skills Gained

During this course, you will learn how to:

- Login to the Marketing Cloud
- Create an email utilizing the content management and template features
- Import data to a data extension for subscriber management
- Execute the segmentation of subscriber data to get a filtered or random segment
- Utilize a query activity to segment subscriber data
- Build and automate daily task and emails
- Test, send and track your email results

Who Can Benefit

This course is designed for email digital marketers who manage the email channel for their organization. No prior knowledge of the Marketing Cloud is needed.

Course Details

Day 1

Getting Started

- Email Data Setup
- Importing Data
- Portfolio and Templates
- Create Email
- Test, Send and Track Results

Overview of the Marketing Cloud

- What is the Salesforce Marketing Cloud (MC)?
- How do I login to the MC?

- How do I access the Email application?
- What does the Overview screen show me?

Overview of Email Data

- What are three ways to store data in the Email Application?
- What is a Data Extensions?
- How to create a Data Extension?
- What data is stored in a data extension?

Importing Data

- What are the four ways to import data?
- How to import data using the Import Wizard?

Content Management

- What is an Asset?
- How do I upload assets to the Portfolio?

Content Blocks

- What is a content block?
- Types of content blocks
 - o Text
 - o Image
 - o Free Form
 - o HTML
 - o Dynamic Content
 - o Personalization Strings

Template

- What is an Email Template?
- What are the two ways to create a Template?
- How do I create an Email Template via the editor and paste HTML

Create Email

- What are my Email creation options?
- How do I create an email via content blocks?

Test

- What are testing tools are available?
- What does each tool do?

Send

- What are the different ways I can send my Email?
- How do I send an Email using the Guided Send process?
- What happens when you send?

Track

- How do I track results of my Email Send?
- How do I create a Report?

Non-Sendable Data Extensions

- What other data can be stored?
- How is data in different data extensions joined?

Import Activity

- What is the source file location (FTP)?
- How can the Import Activity be executed?

Automation Introduction

- What is Automation Studio?
- What are the two types of automation?
- What are the components of a workflow?
- How often can an automation repeat?
- When does an automation end?

Day 2

Overview of Subscriber Segmentation

- What is segmentation
- Why use segmentation
- What tools are available to segment subscribers

Drag and Drop Segmentation

- What is Drag & Drop Segmentation
- What is a random segment
- How to create a random segment
- What is a filtered segment
- How to create a filtered segment

Refreshing Data

- How to refresh data manually?
- What is a data filter?
- What is a Filter Activity?

Measures

- What is a measure?
- Type types of measures available?
- How to create a custom measure

Query Activity

- What is a Query?
- What is SQL?
- How do you refresh segments created via the Query Activity.
- How to write a query using SQL

Day 3

Email Automation Overview

- What is Automation?
- What tools are available?

Marketing Cloud Playbooks

- What Playbooks are available?
- What is the Welcome Series Playbook?
- How to set up a Welcome Series?

Triggered Emails

- What is a Triggered Email?
- How do you defined a Triggered Email?
- What is a send classification?

Email Automation Use Case

- What is a Drip Campaign?
- What is the process for setting up a drip campaign?
- Plan the campaign
- Create Marketing Cloud campaign
- Prepare the data
- Segment the subscribers using data relationships and data
- filters
- Build the emails and associate to a campaign
- Create User-Initiated Email Definition
- Automate via Automation Studio

Other Activities to Automate

- File Transfers

- Wait States
 - Data Extracts
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