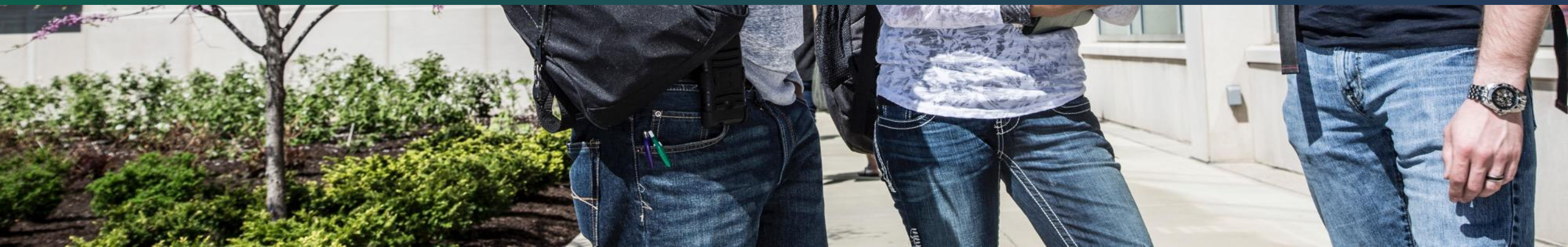




MARKETING CLOUD

ADVANCED STRATEGIES





WHAT TO EXPECT

What Are Some Advanced Salesforce Marketing Cloud Strategies?



Marketing Cloud is an exceptionally powerful tool when it comes to delivering messages to students.

During this session, you're going to learn a bit more about how you can use it to send the **right message** to the **right student** at the **right time**.

What Are Some Advanced Salesforce Marketing Cloud Strategies?



Specifically, we'll be:

- Leveraging **Einstein AI** for send time optimization and other customizations
- Creating dynamic content using **AMPScript**
- Talking about **best practices** when it comes to content, layout, and timing
- Learning about outcomes using **Intelligence Reports** and other analytic tools

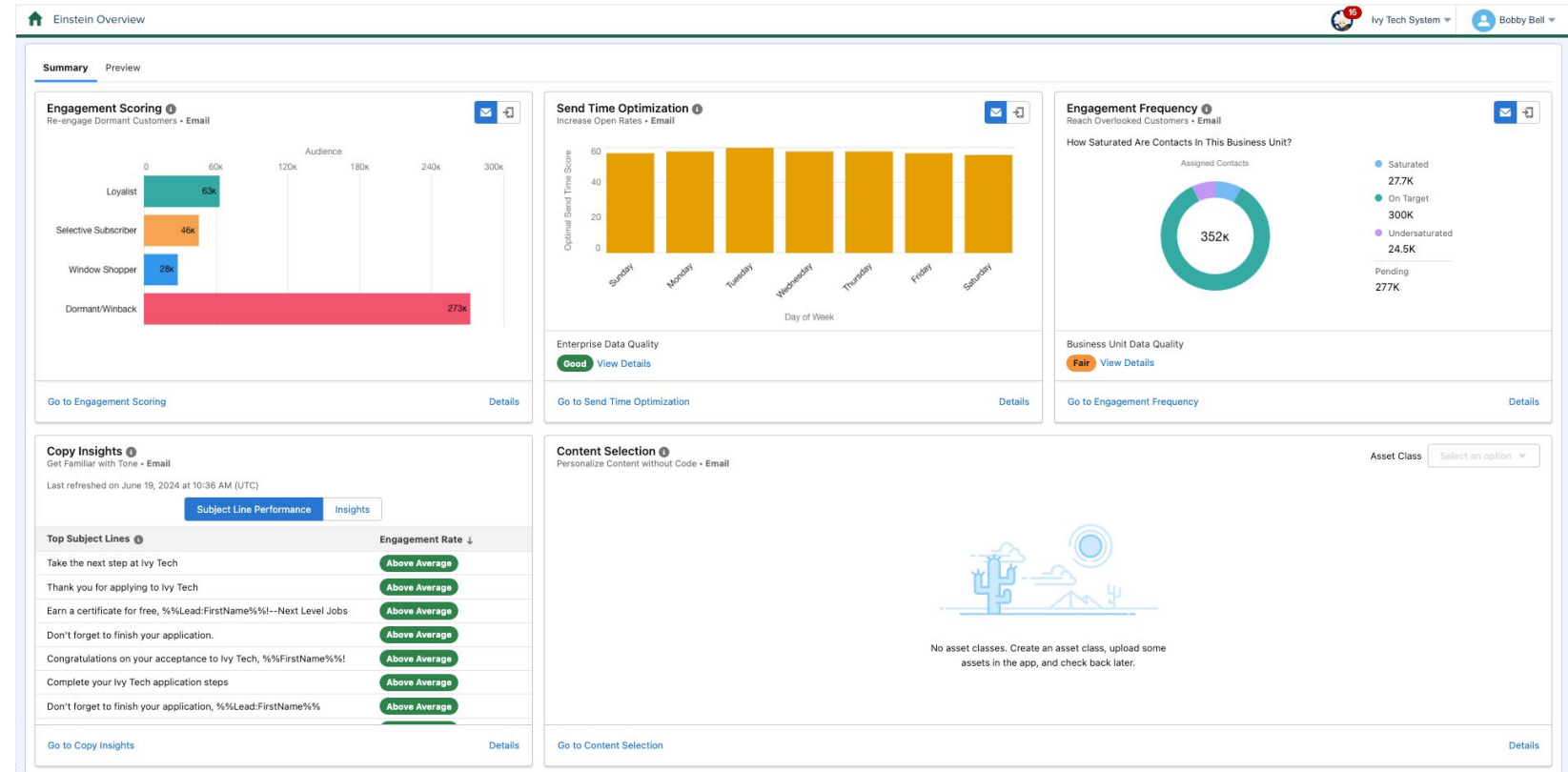


SMARTER MESSAGING WITH EINSTEIN AI

Einstein overview



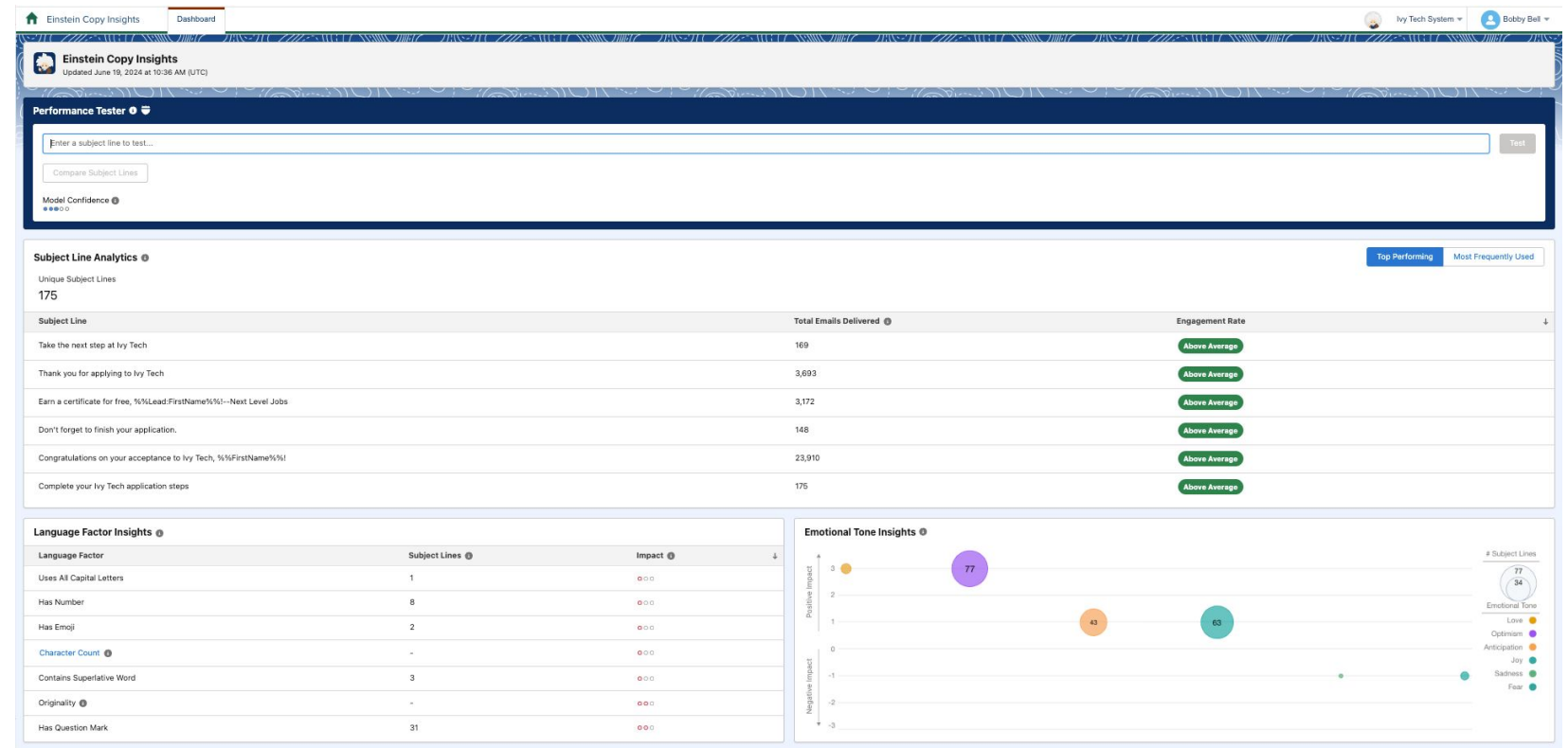
- **High-level** dashboard of Einstein insights
- **Account-level** messaging and audience insights



Einstein Copy Insights



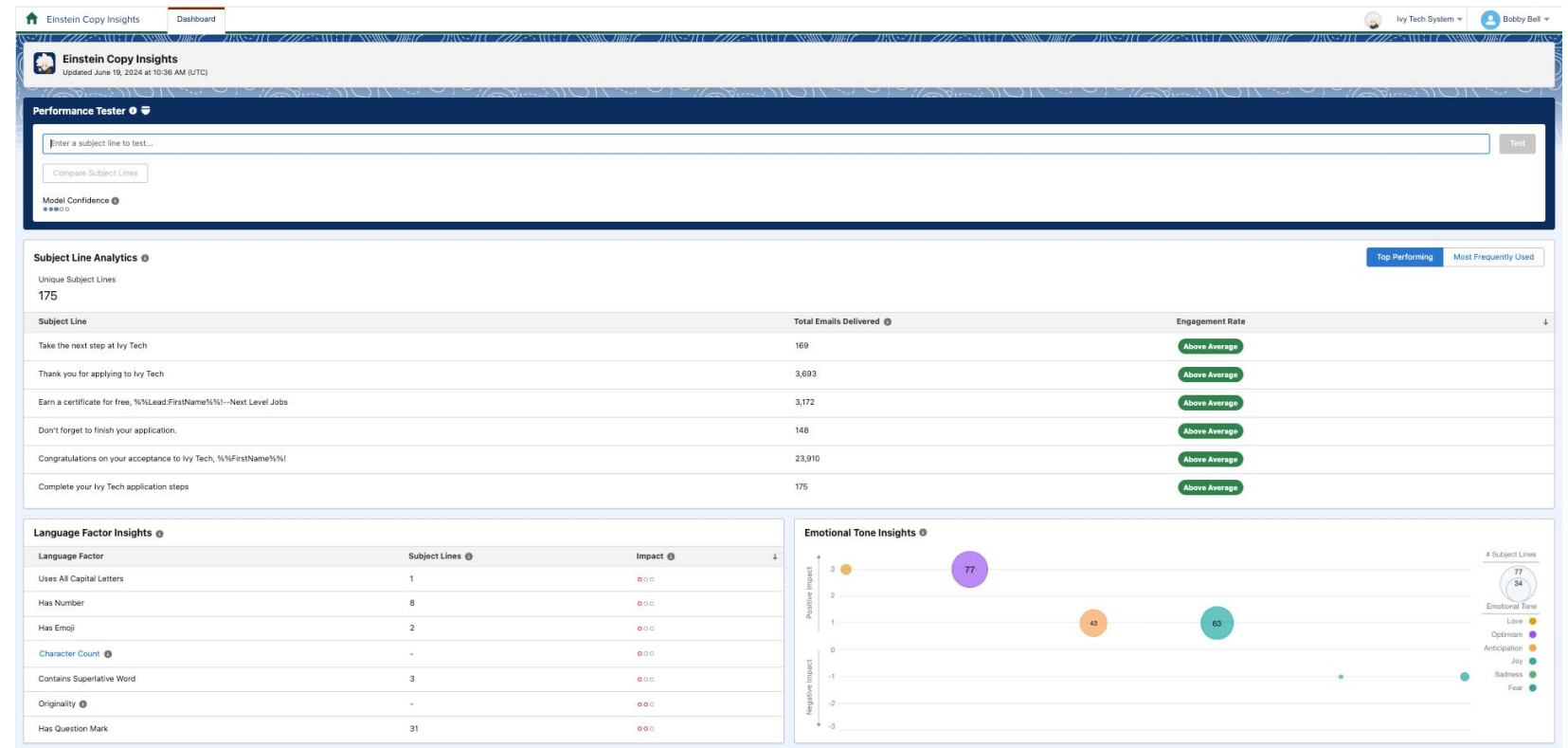
- Analysis of effectiveness of subject lines over the past 90 days
- Performance tester tool to assess probable engagement of a subject



Einstein Copy Insights



- Contains insights related to the tone and language used in a subject, as well as the impact





BUILDING DYNAMIC EMAILS

Developing Dynamic Content With Content Blocks



- Open Content Builder and open the **Training** folder
- Click the down arrow at the end of the **Dynamic Content Test: Everyone Else** row and select **Duplicate**
- Rename the block to read **DC Test: Everyone Else <your initials>**. Press the Save and Edit button

The screenshot shows the Content Builder interface. On the left is a navigation tree with folders like Richmond (RIC), Sellersburg (SEL), South Bend/Eikhart (SBE), Systems Office (SO), and 2024 Student Communications Template. Under the last folder, there is a 'Content blocks' sub-folder. The main area displays a table of 6283 content items. The table has columns for NAME, LOCATION, TYPE, CUSTOMER KEY, and MODIFIED. A red arrow points to a dropdown arrow at the end of the 'Dynamic Content Test: Everyone Else' row.

NAME	LOCATION	TYPE	CUSTOMER KEY	MODIFIED
ITCC Student Comms Template	2024 Student Communications Template & Assets	Template	cbd45960-05ea-4459-...	06/20/2024 Bobby Bell
EV_IvyWeekly_06242024 IvyWeekly: Have you heard?	Evansville (EVV)	Template-Based Email	eb04aae9-6f28-4425-...	06/20/2024 Allison Brune
BLM_HS Labs tour_July9_Dropouts_070124 Thinking about a career in healthcare?	Bloomington (BLM)	Template-Based Email	6526703f-53f7-474f-a...	06/20/2024 Sandra Fouty
TH - Weekly News - June 24, 2024 Here's what's Trending at the Tech, %%First Na...	Student Newsletter	Template-Based Email	2ef4ae42-e12b-4c45-...	06/20/2024 Ali Kruger
EV_Need_KA_Fall24 - Ben You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	24b0ba7c-dde2-4fa3-...	06/20/2024 Marsha Jackson
EV_Need_KA_Fall24 - Jennifer You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	a80ec69e-18fd-482c-...	06/20/2024 Marsha Jackson
EV_Need_KA_Fall24-Jennifer You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	8f6492fa-7ccc-4650-b...	06/20/2024 Marsha Jackson
Riverscape.png	Content Blocks	Image	53605ad9-4d32-4651-...	06/20/2024 Ali Kruger
EV_Need_KA_Fall24 - Twyla-6-20-24 You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	0aeb094a-8e1a-4f69-...	06/20/2024 Marsha Jackson

Developing Dynamic Content With Content Blocks



- Update the text with a broad message about Ivy Tech
- Press **Save**, then go back to **Content Builder**
- In the upper-right corner, click the blue **+ Create** button and select **Content Blocks** and then **Dynamic Content**

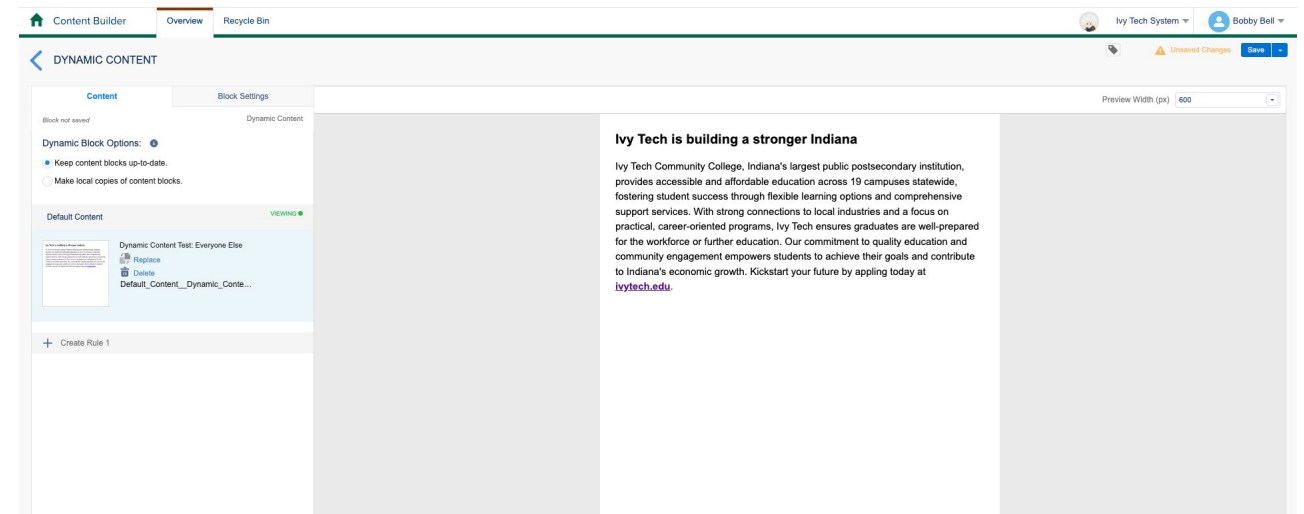
The screenshot shows the Content Builder interface. On the left is a navigation tree under 'LOCAL' and 'SHARED'. The 'LOCAL' section is expanded to show 'Ivy Tech System' and its sub-items: Richmond (RIC), Sellersburg (SEL), South Bend/Elkhart (SBE), Systems Office (SO), Can I delete these?, Email Headers, Image Repository, and 2024 Student Communications Template. Under '2024 Student Communications Template', 'Content blocks' is expanded to show 'Buttons and callouts', 'Headers and text blocks', 'Image blocks', 'Original Button Files', and 'Academics'. The 'Academics' section is further expanded to show 'Office of Diversity, Equity, & Belonging' and 'Provost'. The main area displays a table of 6283 content items. The table has columns for NAME, LOCATION, TYPE, CUSTOMER KEY, and MODIFIED. The items listed include templates and template-based emails.

NAME	LOCATION	TYPE	CUSTOMER KEY	MODIFIED
ITCC Student Comms Template	2024 Student Communications Template & Assets	Template	cbd45960-05ea-4459-...	06/20/2024 Bobby Bell
EV_IvyWeekly_06242024 IvyWeekly: Have you heard?	Evansville (EVV)	Template-Based Email	eb04aae9-6f28-4425-...	06/20/2024 Allison Brune
BLM_HS Labs tour_July9_Dropouts_070124 Thinking about a career in healthcare?	Bloomington (BLM)	Template-Based Email	6526703f-53f7-474f-a...	06/20/2024 Sandra Fouty
TH - Weekly News - June 24, 2024 Here's what's Trending at the Tech, %%First Na...	Student Newsletter	Template-Based Email	2ef4ae42-e12b-4c45-...	06/20/2024 Ali Kruger
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EV_Need_KA_Fall24 - Jennifer You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	a80ec69e-18fd-482c-...	06/20/2024 Marsha Jackson
EV_Need_KA_Fall24-Jennifer You need to take the Knowledge Assessment at I...	Evansville (EVV)	Template-Based Email	8f6492fa-7ccc-4650-b...	06/20/2024 Marsha Jackson
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Developing Dynamic Content With Content Blocks



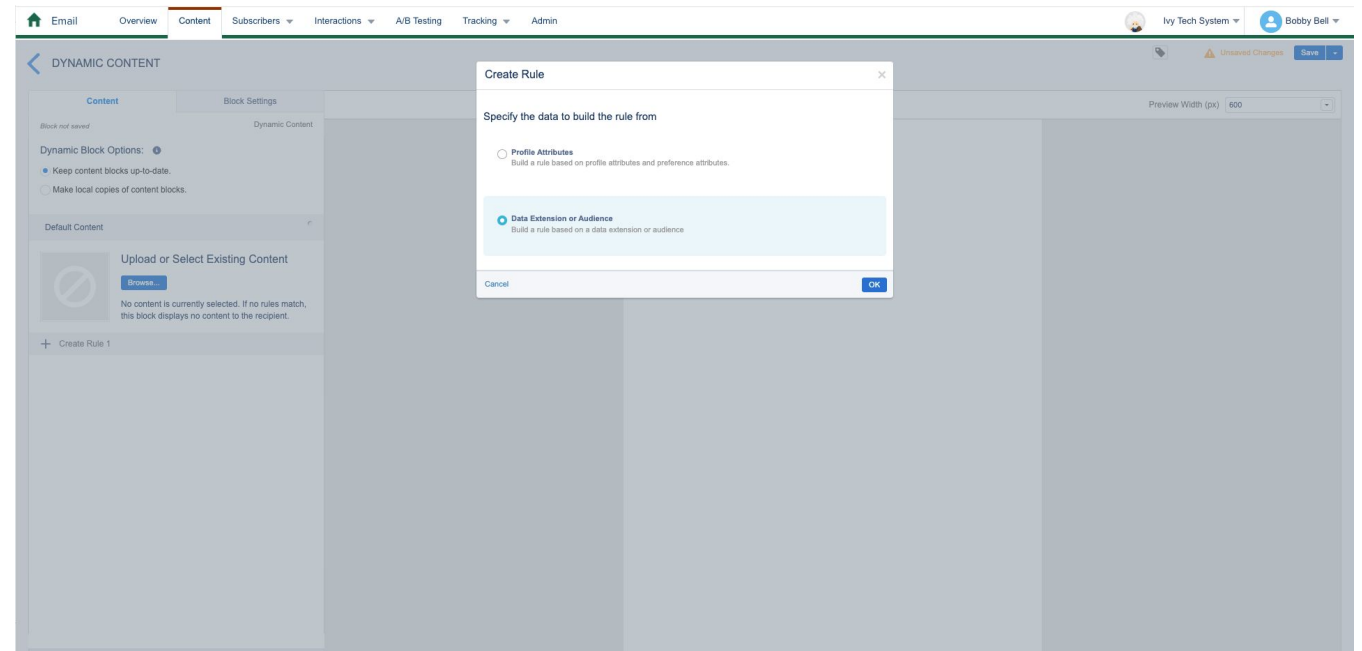
- Leave the **Keep content blocks up-to-date** radio button selected
- Press the **Browse** button in the **Upload or Select Existing Content** section of **Default Content**
- Select the content block you just built, and press **Select**



Developing Dynamic Content With Content Blocks



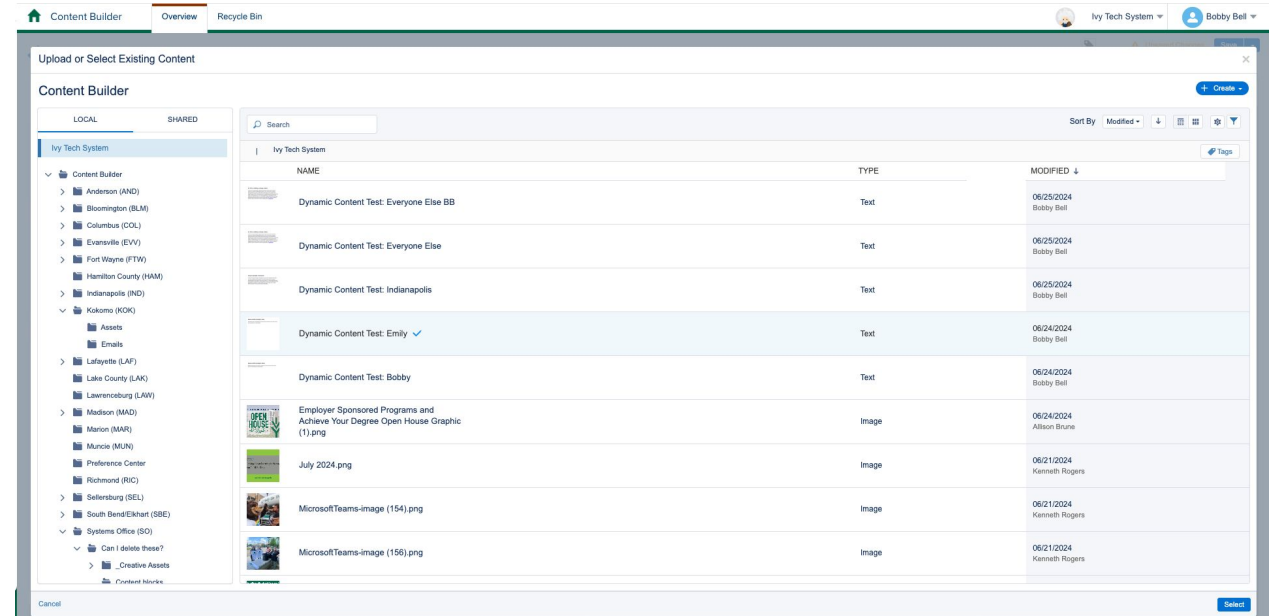
- Click Create Rule 1
- Select the Data Extension or Audience radio button
- Select **Salesforce Data Extensions > Training > SWMM Dynamic Content Training**
- Press **Ok**



Developing Dynamic Content With Content Blocks



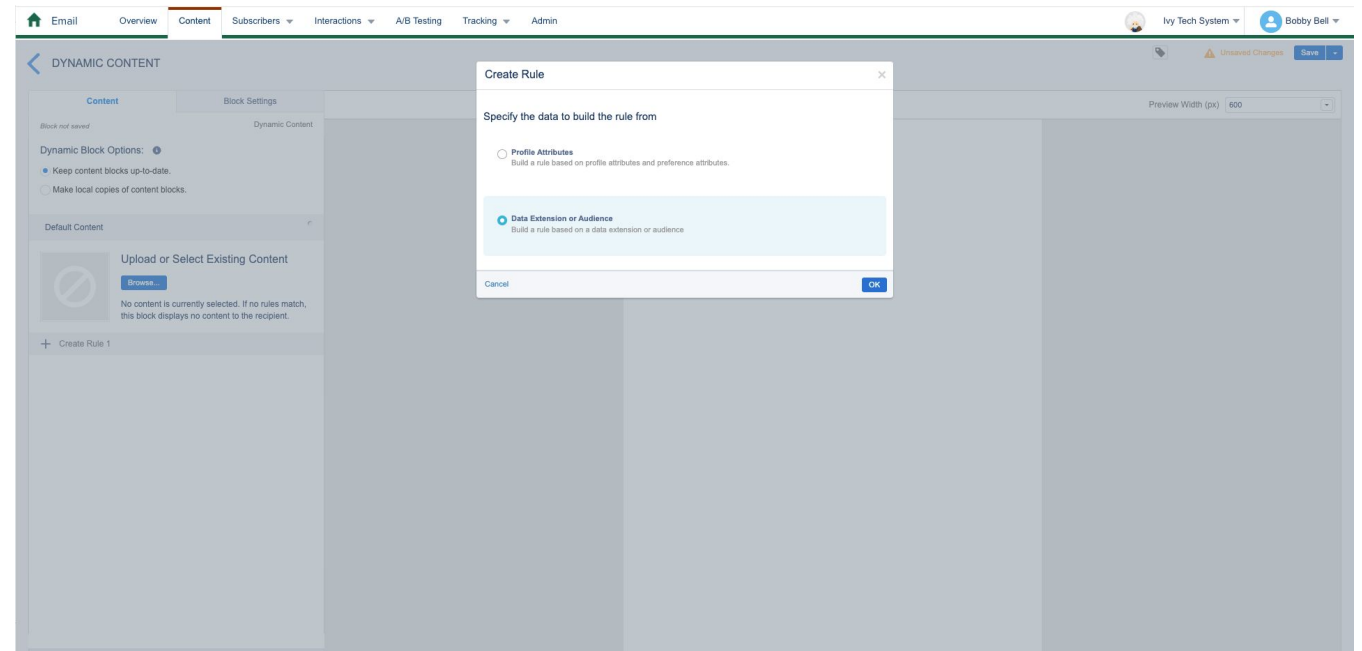
- Press the **Select** button in the middle of the top **Content** row
- Select the block named **Dynamic Content Test: Emily**
- Press **Select**



Developing Dynamic Content With Content Blocks



- Drag the **Campus** row to the **Filter** window
- Enter **Systems Office** in the text box
- Drag **First Name** to the Filter window
- Enter **Emily** in the text box
- Press **Save**



Developing Dynamic Content With Content Blocks



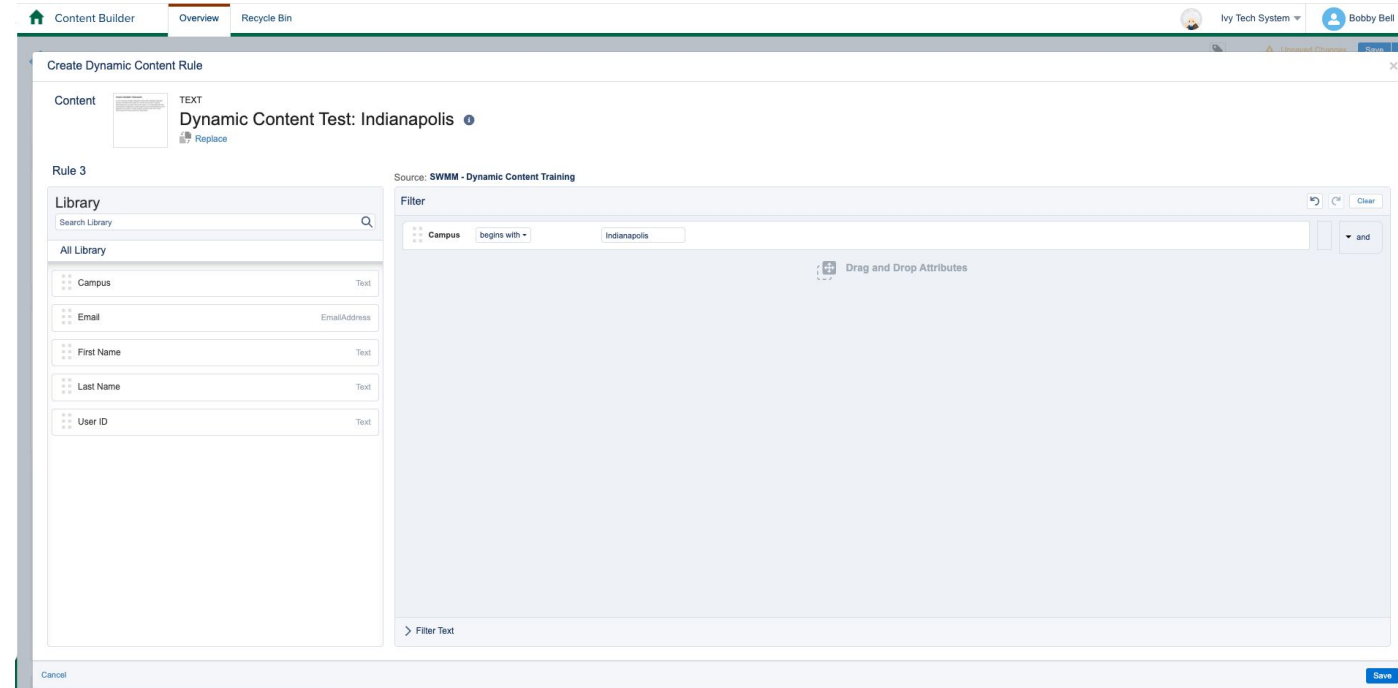
- Press **Duplicate** in the rule box you just created
- Rename **Rule 1 (copy)** to **Rule 2** and press **Edit**
- Replace the content block with **Dynamic Content Test: Bobby**
- Change **First Name** from **Emily** to **Robert**
- Press **Save**
- Press **Create Rule 3**

A screenshot of a web application interface for configuring dynamic content. The page title is "DYNAMIC CONTENT" and the sub-page is "SWMM Dynamic Content BB". There are two tabs: "Content" (selected) and "Block Settings". Under "Content", there is a section for "SWMM Dynamic Content BB" with a "Dynamic Content" label and a radio button for "Make local copies of content blocks.". Below this is a "Default Content" section with a "VIEWING" indicator. It shows a preview of "Dynamic Content Test: Everyone Else" with "Replace" and "Delete" buttons. Under "Rule 1", there is a preview of "Dynamic Content Test: Emily" with "Edit", "Delete", and "Duplicate" buttons. Below the preview is a filter rule: "Campus is equal to Systems Office AND First Name is equal to Emily". Under "Rule 2", there is a preview of "Dynamic Content Test: Bobby" with "Edit", "Delete", and "Duplicate" buttons. Below the preview is a filter rule: "Campus is equal to Systems Office AND First Name is equal to Robert".

Developing Dynamic Content With Content Blocks



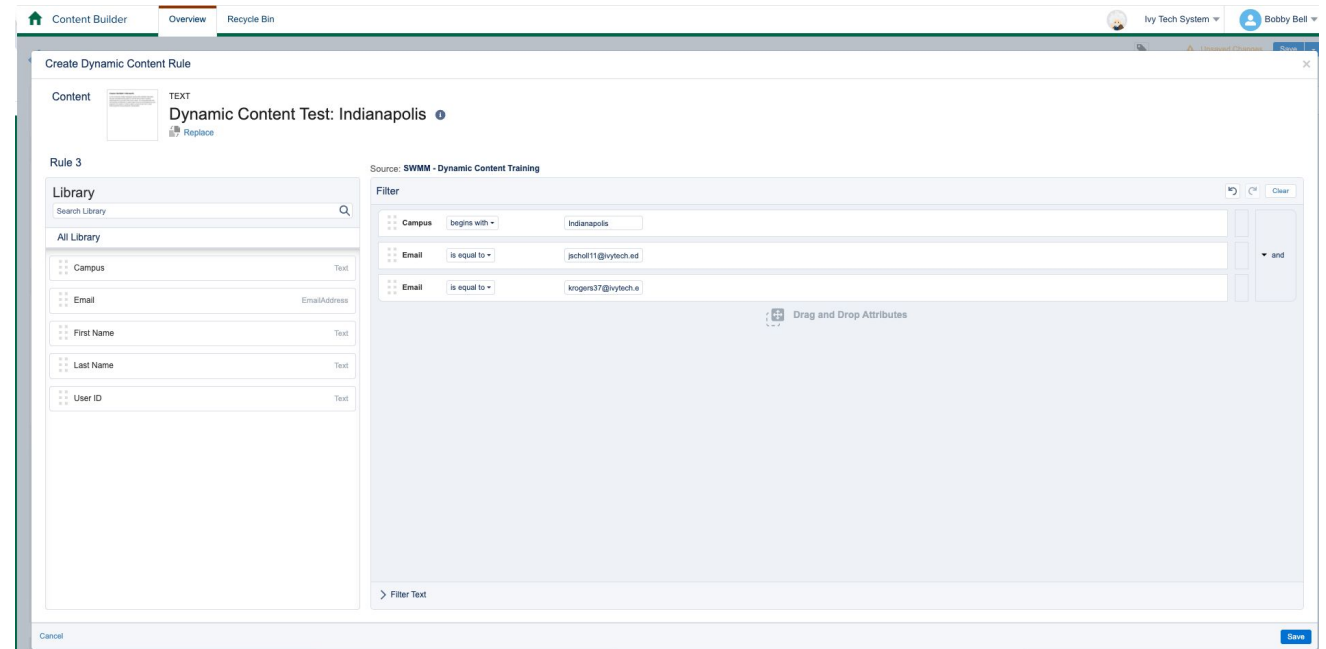
- Select the **Dynamic Content Test: Indianapolis** block by pressing **Select** in the **Content** row
- Drag the **Campus** row to the **Filter** window
- Change the **is equal to** drop down to **begins with** and type **Indianapolis** in the text value box



Developing Dynamic Content With Content Blocks



- Drag **Email** into the filter underneath **Campus**
- Enter **jscholl11@ivytech.edu** into the text value box
- Drag another **Email** below the one you just added
- Enter **krogers37@ivytech.edu**



Developing Dynamic Content With Content Blocks



- Link the two email rows by hovering over and clicking one of the narrow great boxes next to the **and** operator
- Change the new **and** operator to **OR** by clicking it
- Press **Save**

Source: SWMM - Dynamic Content Training

Filter

↶ ↷ Clear

Campus begins with Indianapolis

Email is equal to jscholl11@ivytech.ed

Email is equal to krogers37@ivytech.e

✕ and

OR

⊕ Drag and Drop Attributes

Developing Dynamic Content With Content Blocks



- Save your dynamic content by clicking the **Save** button
- Name it **SWMM Dynamic Content <your initials>**
- Exit back to content builder and open the email you created yesterday in edit mode
- On the left, select the content tab and drag your **Dynamic Content Block** to the body of your email and press **Done Editing**, followed by the **Next** button in the top right

Developing Dynamic Content With Content Blocks



- In the **Subscriber Preview and Attributes** tab, click the file folder and navigate to: **Salesforce Data Extensions > Training > SWMM – Dynamic Content Training** and select any name in the extension and press **Select**
- Use the arrows next to the file folder to preview your dynamic content



INTRODUCTION TO AMPSCRIPT

Developing Dynamic Content AMPscript



AMPscript is a scripting language developed for Salesforce Marketing Cloud that uses simple semantics and syntax through various functions, allowing you to develop **highly personalized** communications.

AMPscript can be built with complexity that allows you to send custom content based on your constituent's attributes, as well as handle (relatively) simple functions, like ensuring the proper case in a name.

Setting Capitalization/Proper Case With AMPscript



- Exit back to content builder and duplicate the email you modified earlier and name it **SWMM AMP <Your Initials>**
- Delete the Dynamic Content blocks you created in the original message (click the down arrow in the right corner of the block)
- Click on the text in your body and in the left panel, select **HTML Editor**

Setting Capitalization/Proper Case With AMPscript



Directly above the <p>, add the following:

```
%%[var @firstName, @properFirstName
```

This portion means that we're taking first name and replacing it with proper first name.

Setting Capitalization/Proper Case With AMPscript



On the next line, add:

```
set @firstName = [First Name]
```

This tells Marketing Cloud what data field we're looking for when we say firstName

Next add:

```
set @properFirstName = ProperCase(@firstName)%%
```

This tells Marketing Cloud the function we're going to use. That @properFirstName is @firstName combined with the ProperCase function

Setting Capitalization/Proper Case With AMPscript



Altogether, your AMPscript should look like:

```
%%[var @firstName, @properFirstName  
set @firstName = [First Name]  
set @properFirstName = ProperCase(@firstName)]%%
```

Setting Capitalization/Proper Case With AMPscript



Finally, underneath the code you created (just above the <p>), add:

```
<p>Dear %%=v(@properFirstName)=%%,</p>
```

This works like other dynamic text but works with the variable content you just created. In addition to the salutation, you should use **%%=v(@properFirstName)=%%** in place of **%%First Name%%** anywhere it appears in your email.

Setting Capitalization/Proper Case With AMPscript



- Press the **Next** button to get to the preview screen
- In the **Subscriber Preview and Attributes** tab, click the file folder and navigate to: **Salesforce Data Extensions > Training > Dynamic AMPscript Test** and select the **fourth** record (mareena moore) in the extension and press **Select**
- You'll notice the student's name is in lowercase:

00Q6g00000XGudMEAT	mareena	moore
00Q6a00000XGwwREAT	Shakira	Alvarez

- But with the new AMPscript added, it is capitalized in the message

Dear Mareena,



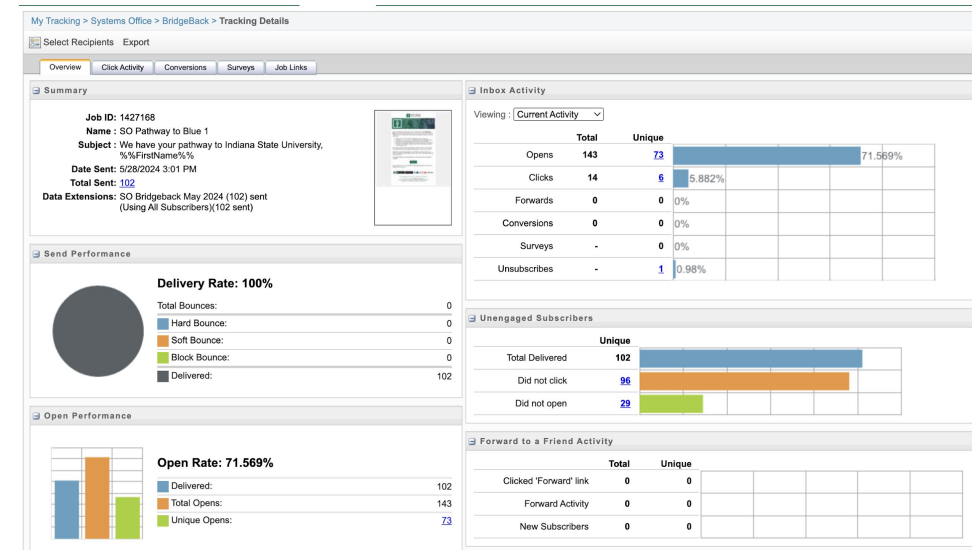
ANALYTICS AND INSIGHTS



Accessing Email Analytics

Your email analytics are available in the **Tracking** section of email studio.

- Clicking on the name gives you extra details
- Your key metrics to watch in these reports are:
 - **Unique opens:** how many opened your message *at least* once
 - **Unique clicks:** how many clicked on *at least* one link
 - **Hard bounces:** how many bad email addresses you have

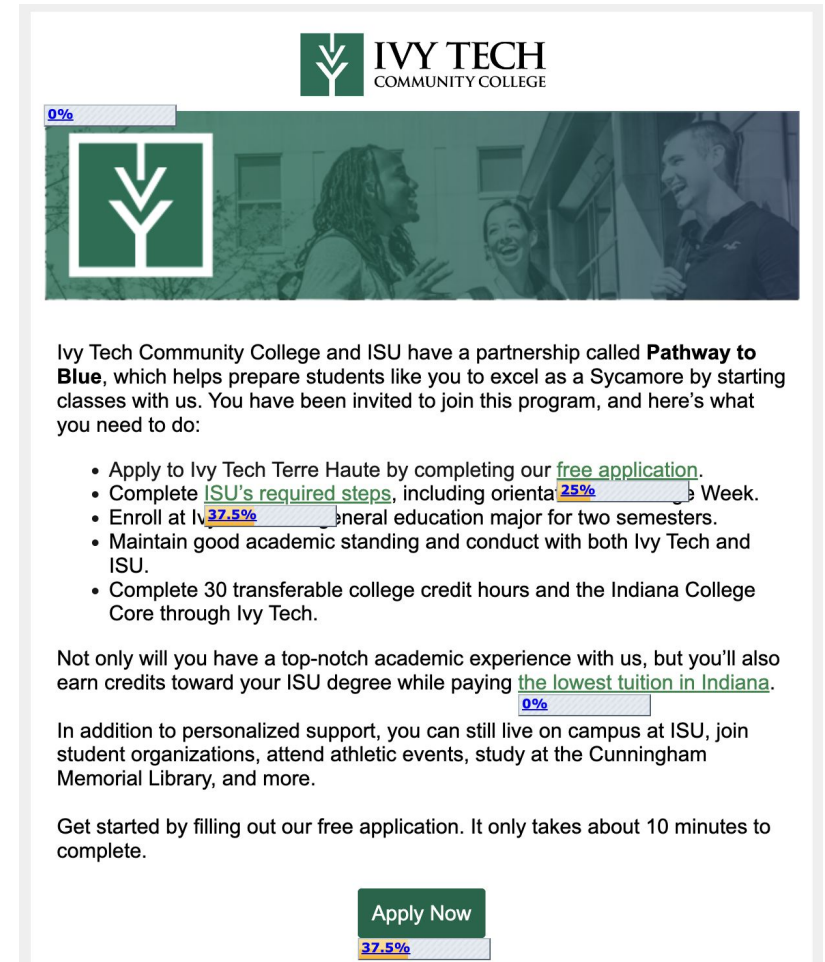


Click Activity



The **Click Activity** tab can tell you which links your recipients are clicking on, as well as the ones they are not.

Within this tab, you can also view engagement on the individual links, including being able to see which students clicked on your links.



The screenshot shows an email header for Ivy Tech Community College. It includes the college's logo and name. Below the header is a banner image with the Ivy Tech logo overlaid on the left and a photo of three students on the right. A progress bar at the top left of the banner shows 0% completion. The main body of the email contains text about a partnership with ISU, a list of requirements for the 'Pathway to Blue' program, and an 'Apply Now' button. A progress bar at the bottom of the email shows 37.5% completion.

IVY TECH
COMMUNITY COLLEGE

0%

Ivy Tech Community College and ISU have a partnership called **Pathway to Blue**, which helps prepare students like you to excel as a Sycamore by starting classes with us. You have been invited to join this program, and here's what you need to do:

- Apply to Ivy Tech Terre Haute by completing our [free application](#).
- Complete [ISU's required steps](#), including orienta [25%](#) Week.
- Enroll at Iv [37.5%](#) neral education major for two semesters.
- Maintain good academic standing and conduct with both Ivy Tech and ISU.
- Complete 30 transferable college credit hours and the Indiana College Core through Ivy Tech.

Not only will you have a top-notch academic experience with us, but you'll also earn credits toward your ISU degree while paying [the lowest tuition in Indiana](#). [0%](#)

In addition to personalized support, you can still live on campus at ISU, join student organizations, attend athletic events, study at the Cunningham Memorial Library, and more.

Get started by filling out our free application. It only takes about 10 minutes to complete.

Apply Now

[37.5%](#)



Click-to-Open Rate

Another key metric to watch is the **click-to-open rate**. While your unique click rate looks at the number of clicks compared to the number of messages **sent**, the click-to-open rate is the number of clicks compared to the number of messages **opened** (or how engaged your engaged recipients are).

But this is something you need to calculate manually (outside of intelligence reports). The formula is:

CTOR: = (unique clicks/unique opens) x 100

“Good” Analytics



There are several factors that determine what “good” analytics are, including the time of year it’s sent (students are more engaged earlier in the cycle than later), the day/time it’s sent (avoid weekends), and more. Here are some funnel-based analytics to **work** towards:

AUDIENCE	OPEN RATE	CLICK RATE
Leads	25%-30%	.5%-2%
Opportunities	45%+	1.5%-3%
Current students	50%+	1.5%-3%

QUESTIONS?



IVY TECH
COMMUNITY COLLEGE