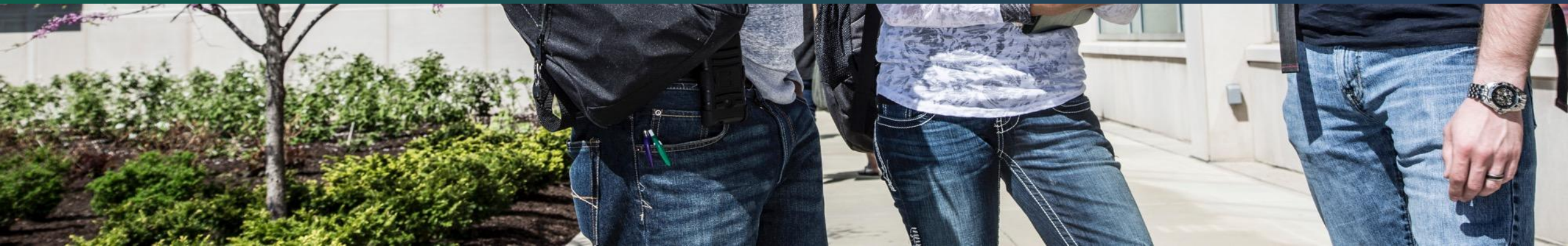
MARKETING CLOUD

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?

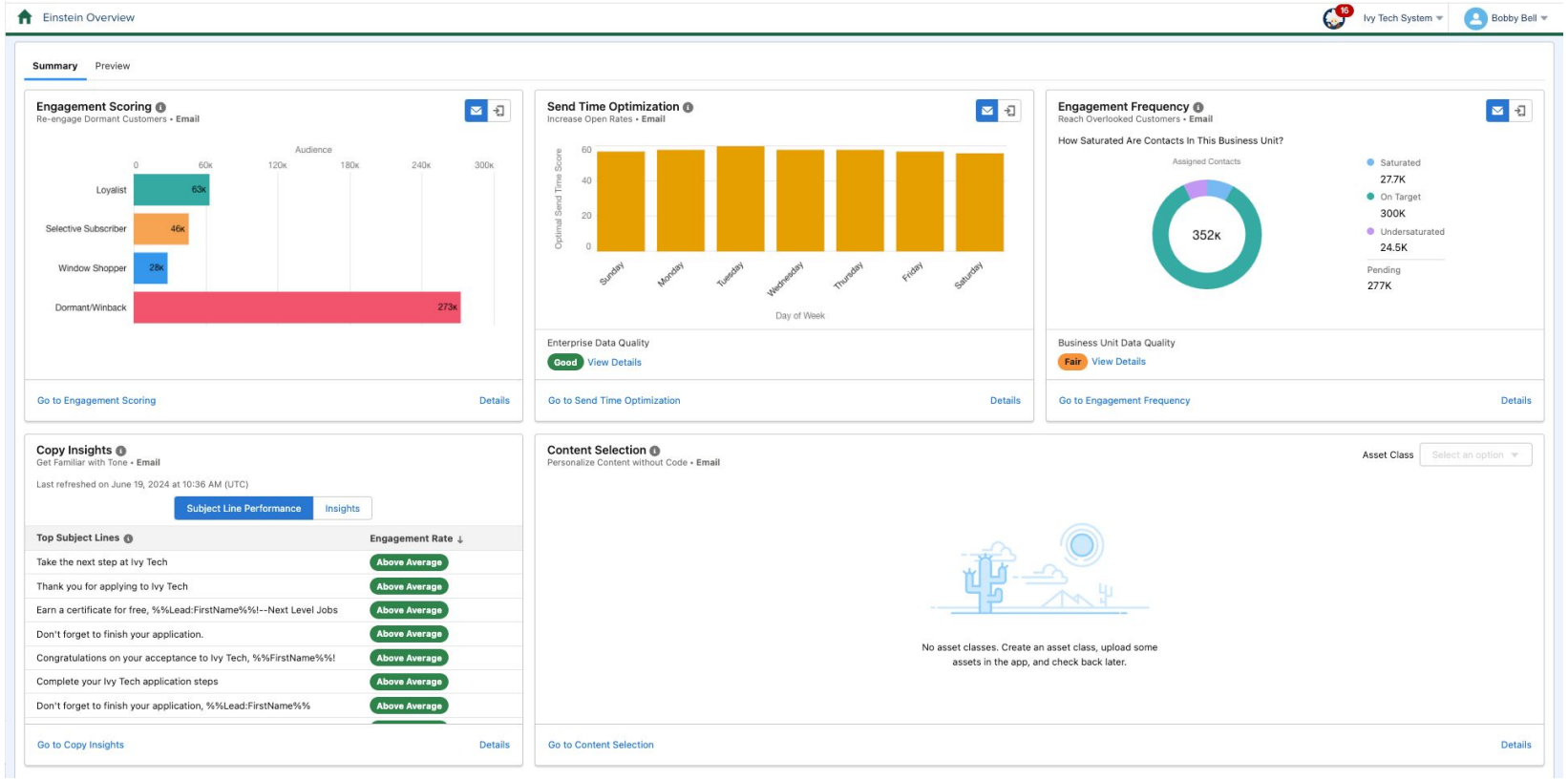
Specifically, we'll be:

- 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

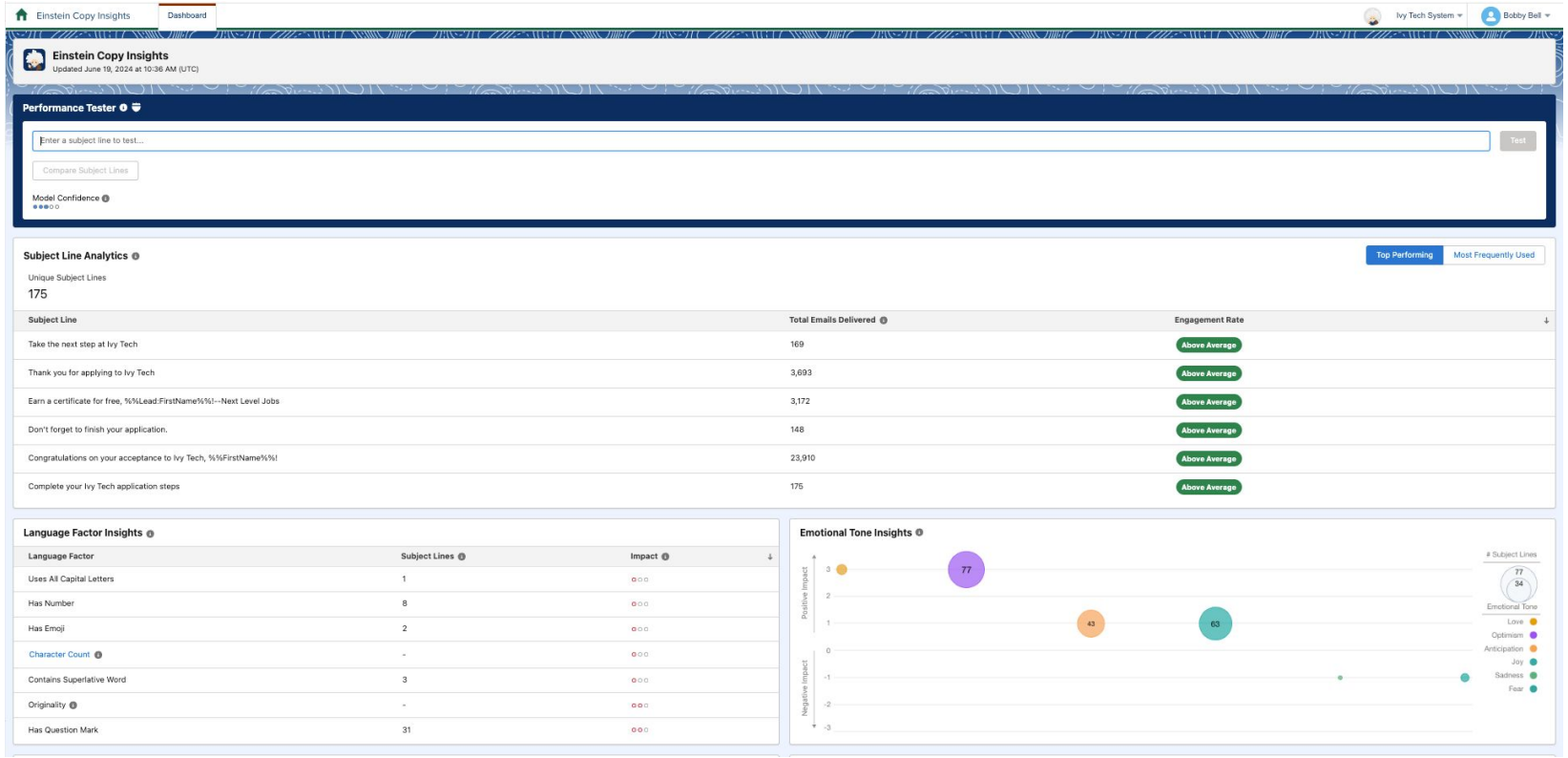
Einstein overview

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



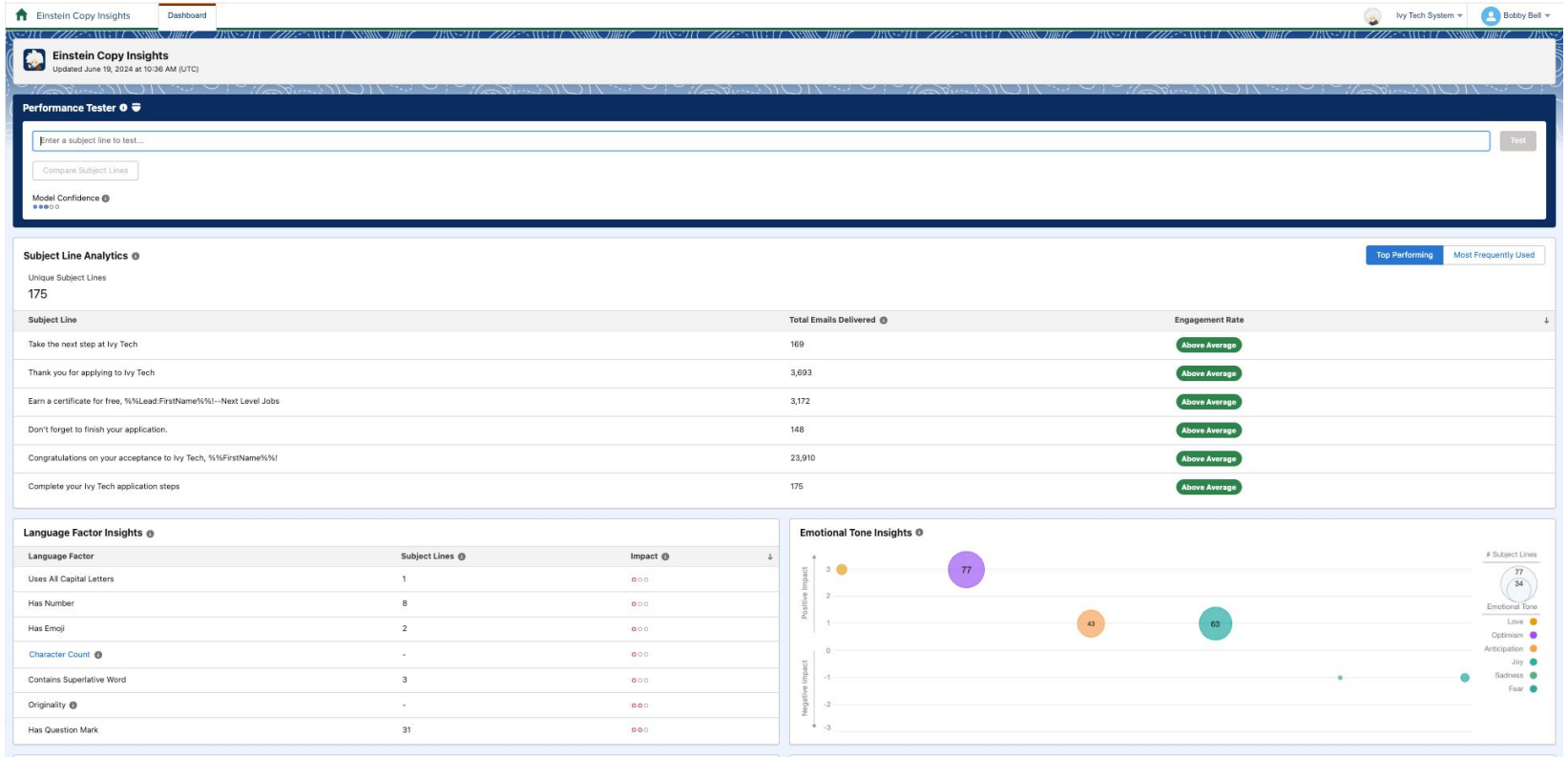
Einstein Copy Insights

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



Einstein Copy Insights

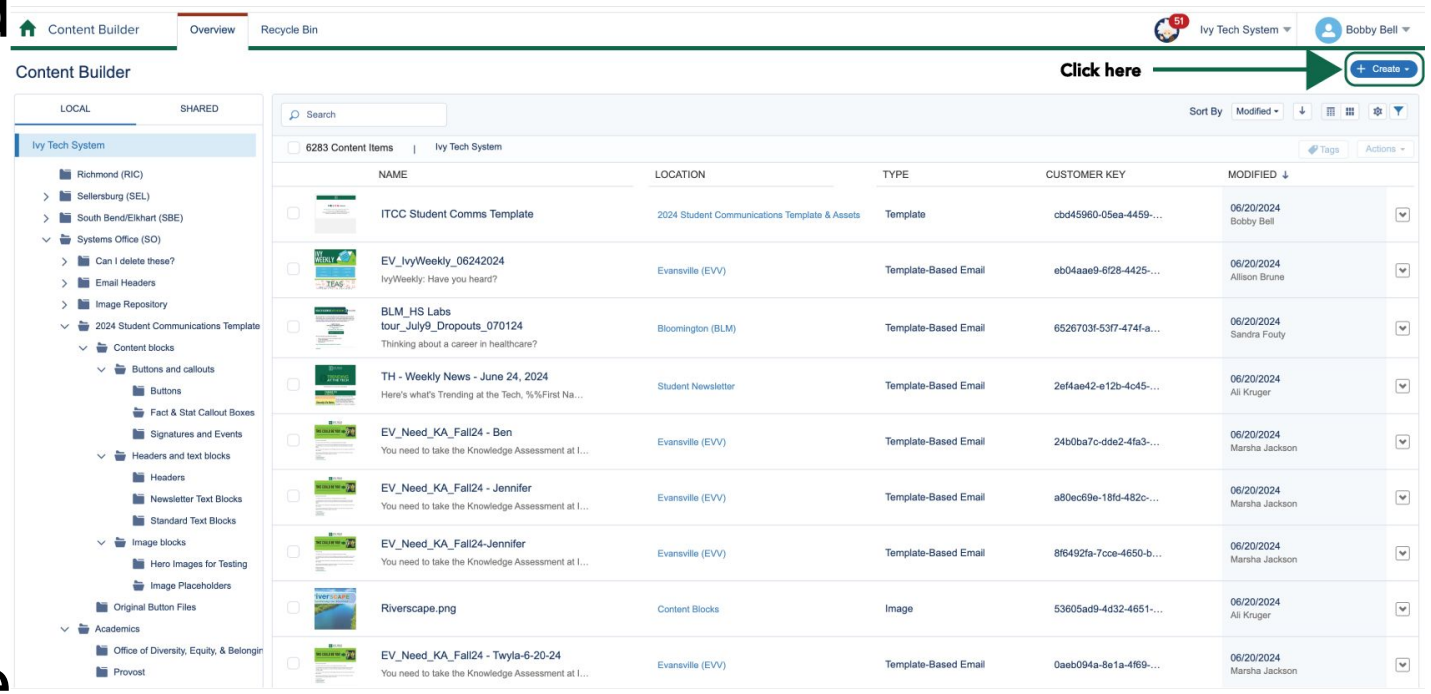
- Contains insights related to the tone and language used in a subject, as well as the impact



BUILDING DYNAMIC EMAILS

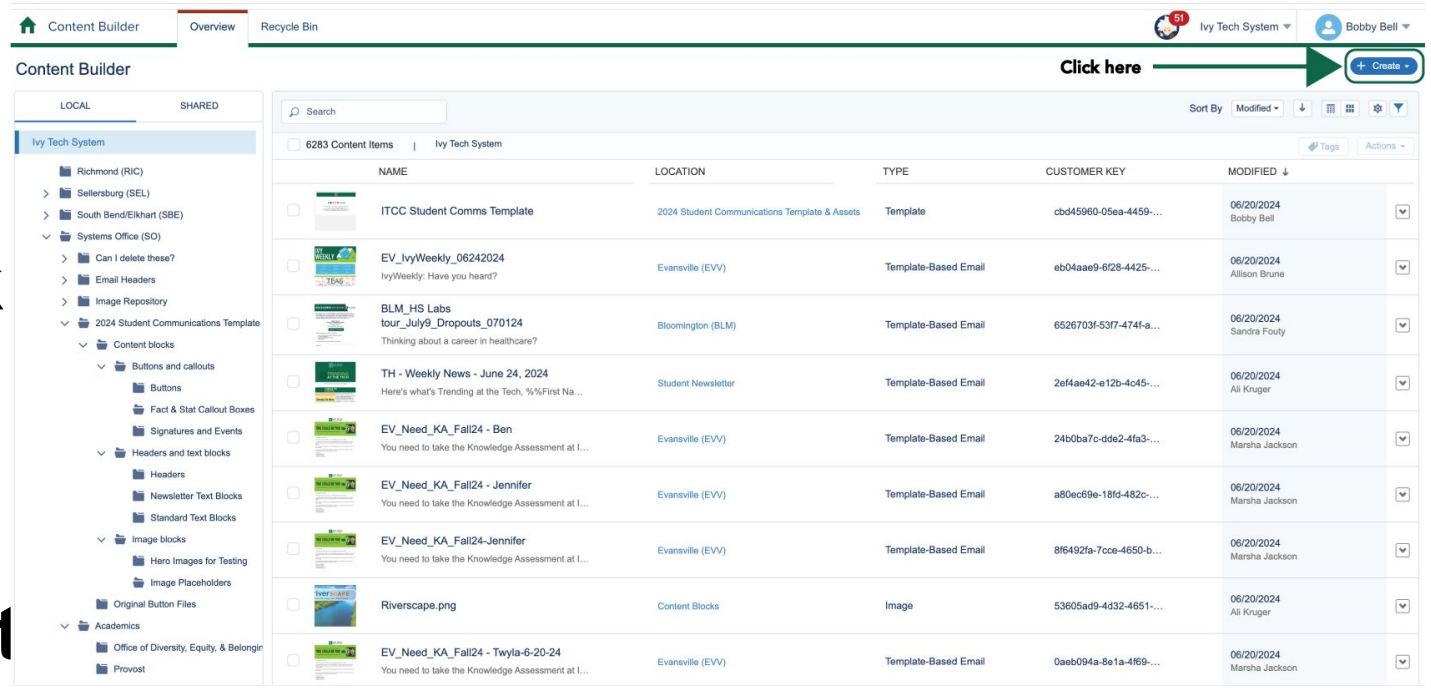
Developing Dynamic Content With Content Blocks

- 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



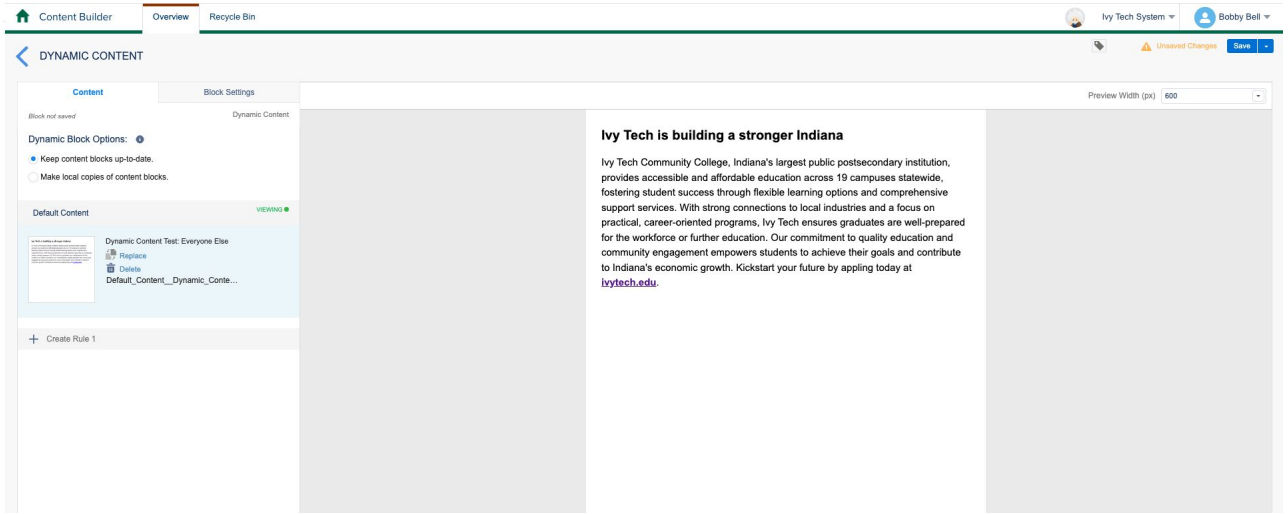
Developing Dynamic Content With Content Blocks

- 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**



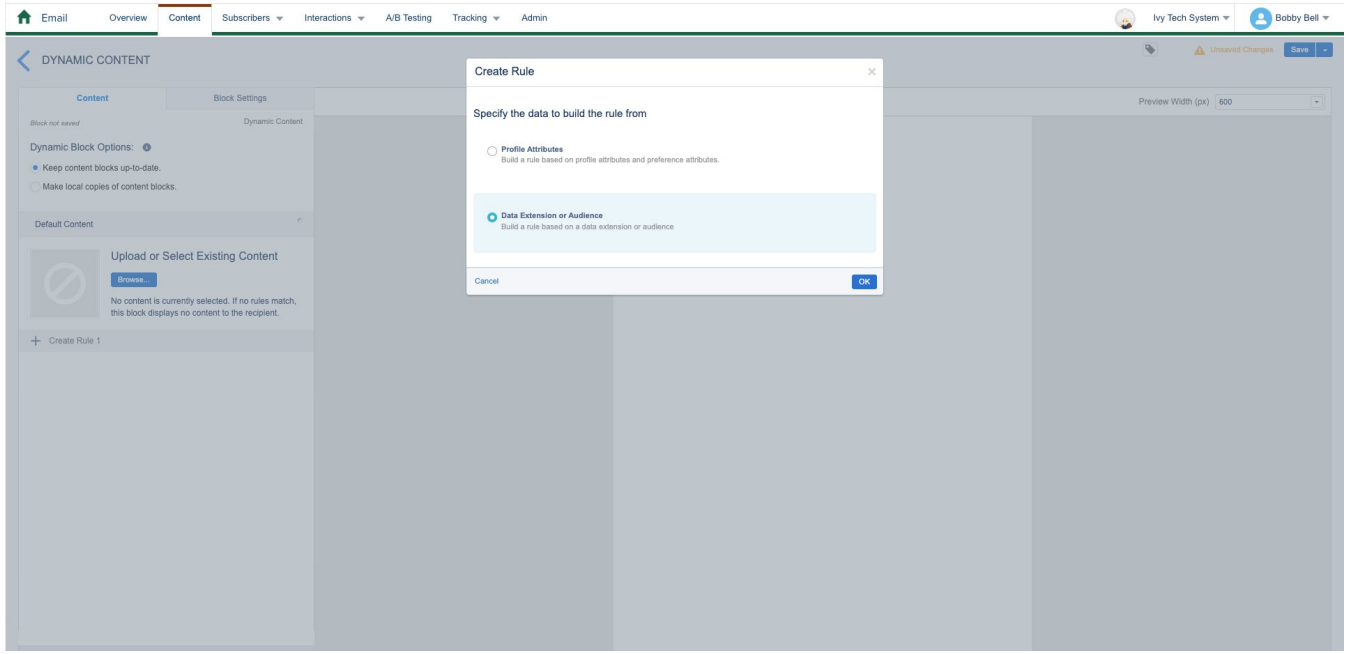
Developing Dynamic Content With Content Blocks

- 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**



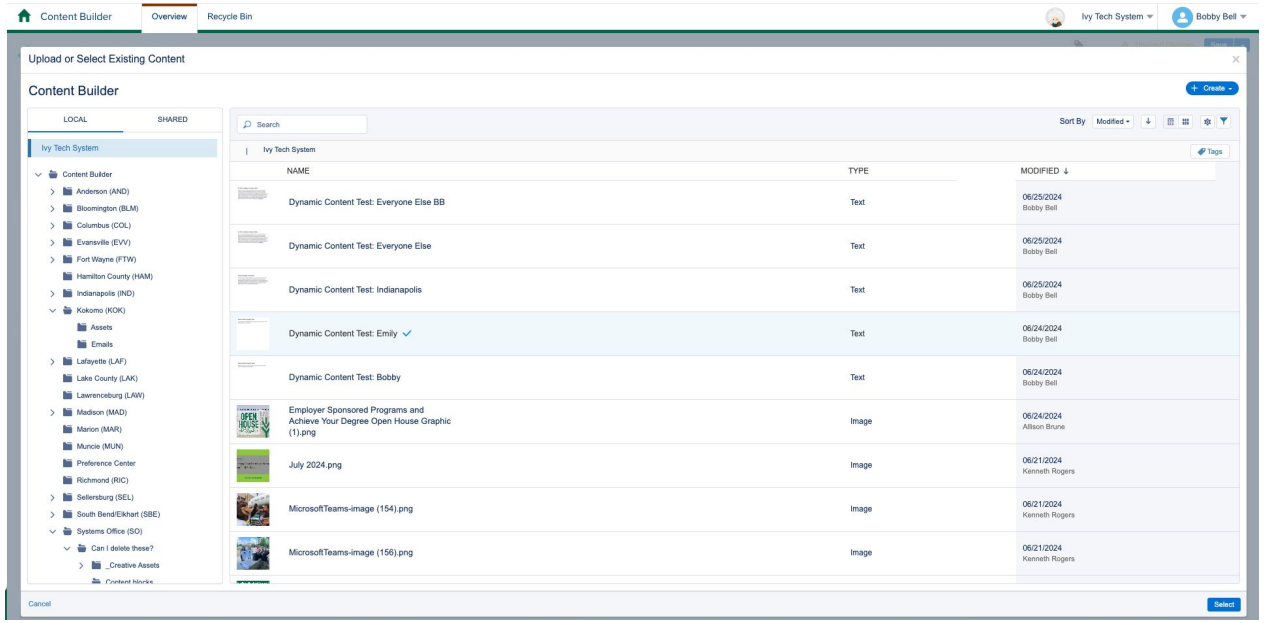
Developing Dynamic Content With Content Blocks

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



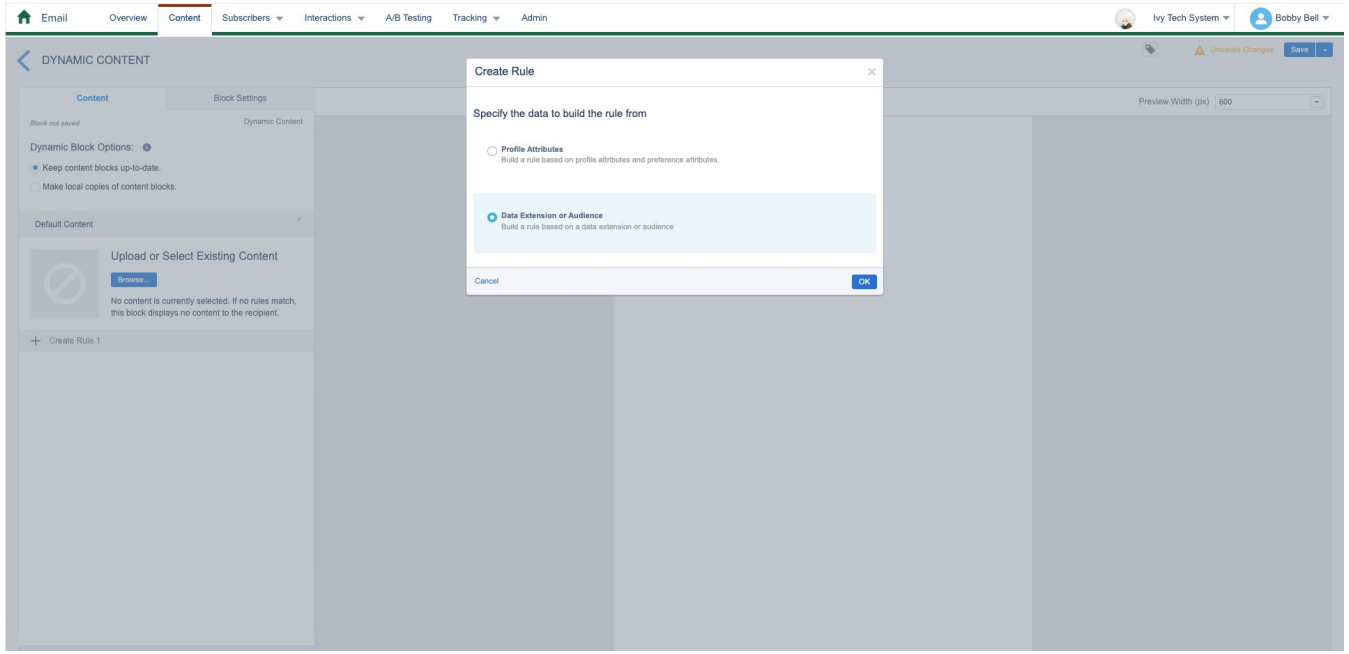
Developing Dynamic Content With Content Blocks

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



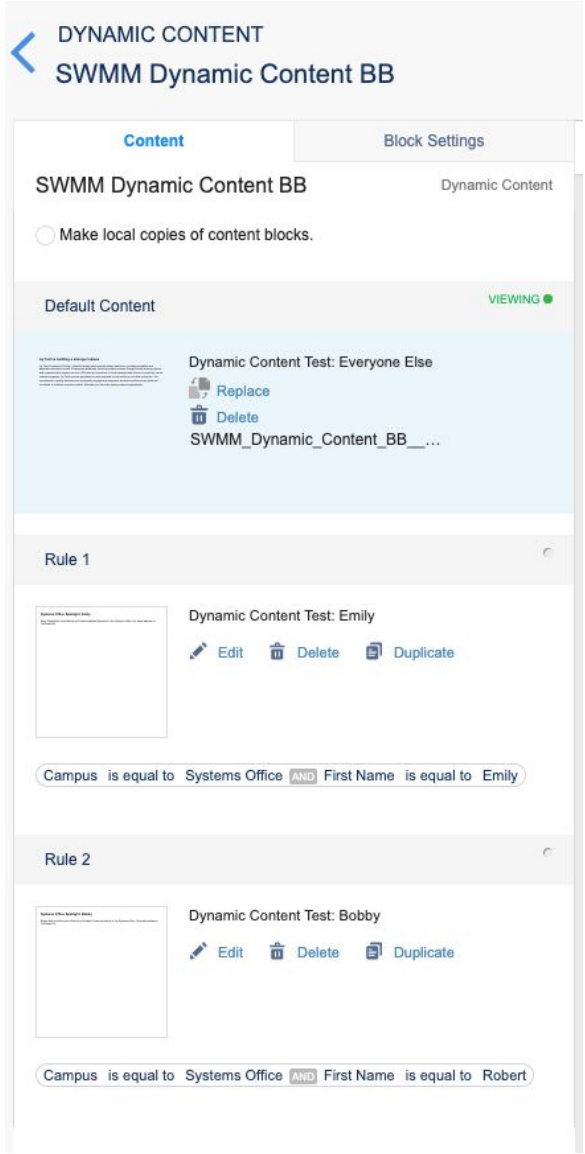
Developing Dynamic Content With Content Blocks

- 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**



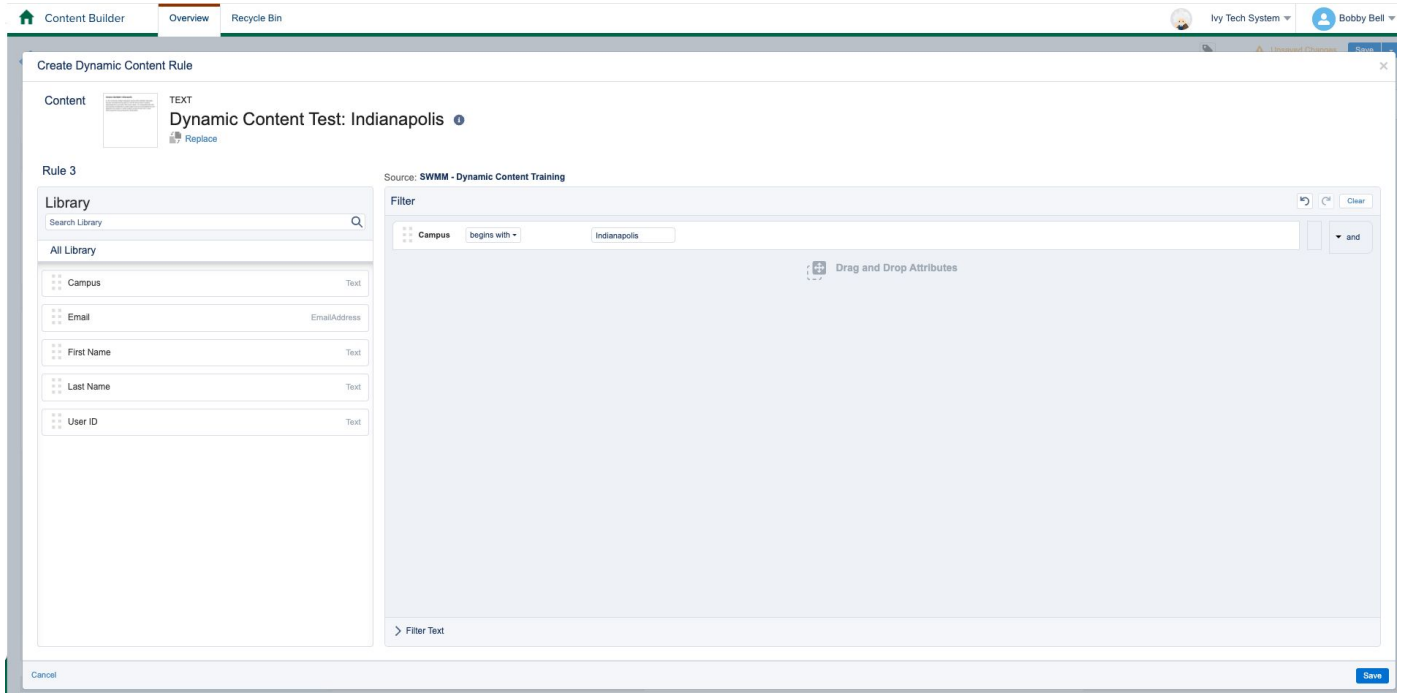
Developing Dynamic Content With Content Blocks

- 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**



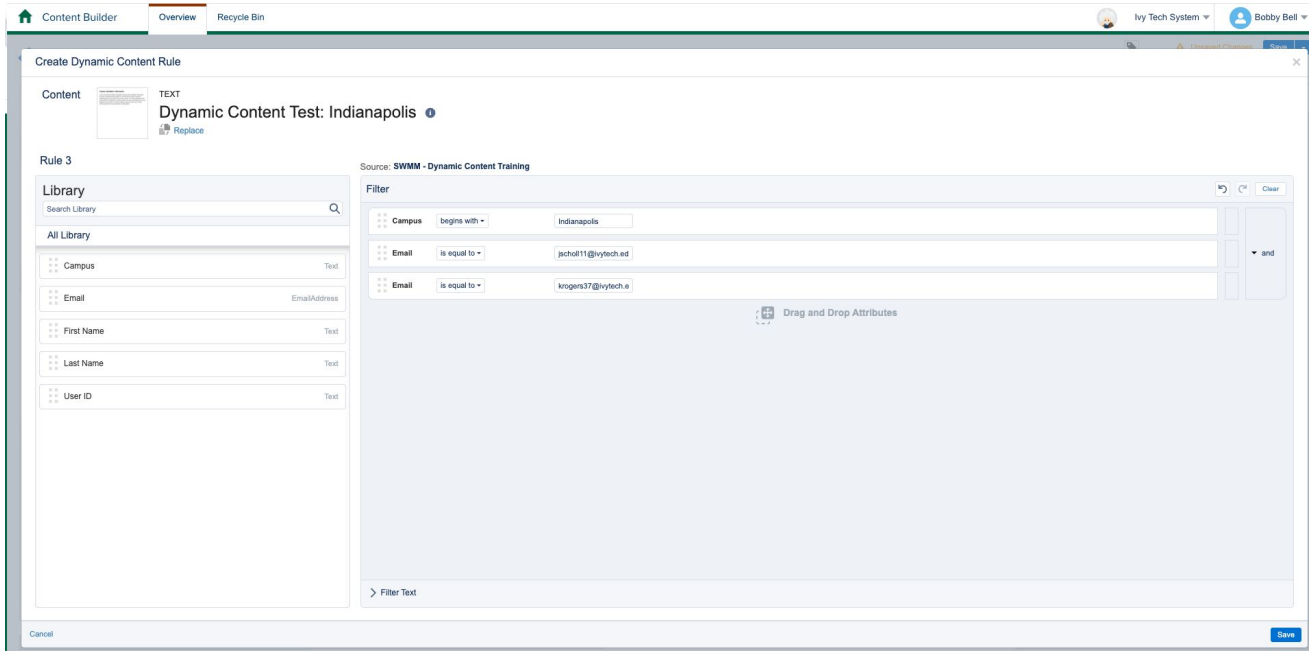
Developing Dynamic Content With Content Blocks

- 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

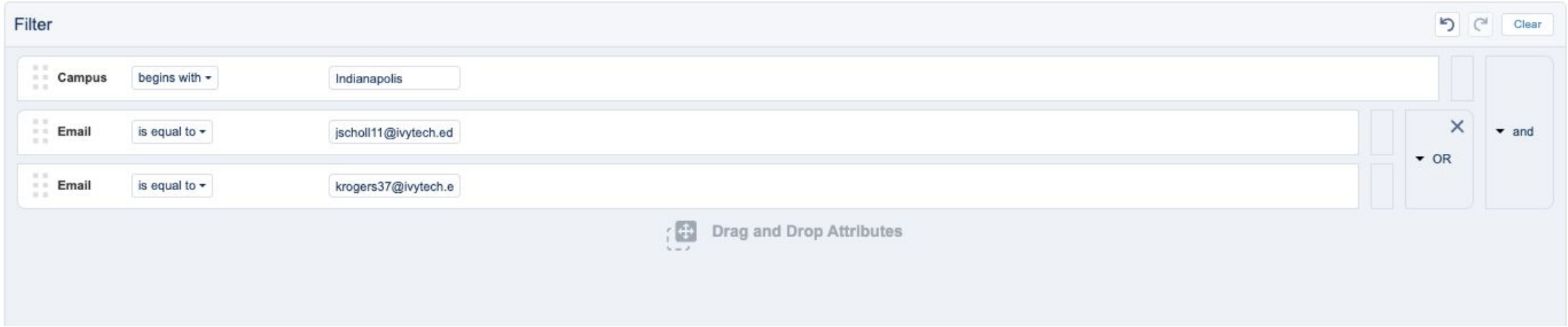
- Drag **Email** into the filter underneath **Campus**
- Enter **jscholl11@ivytech.edu** into the text value box
- Drag another **Email** below the one you just added
- Enter **krogers37@ivytech.edu**



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**



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

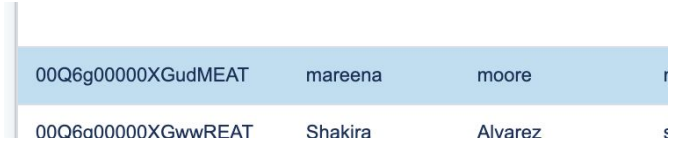
Finally, underneath the code you created (just above the), add:

Dear %%=v(@properFirstName)=%%,

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:



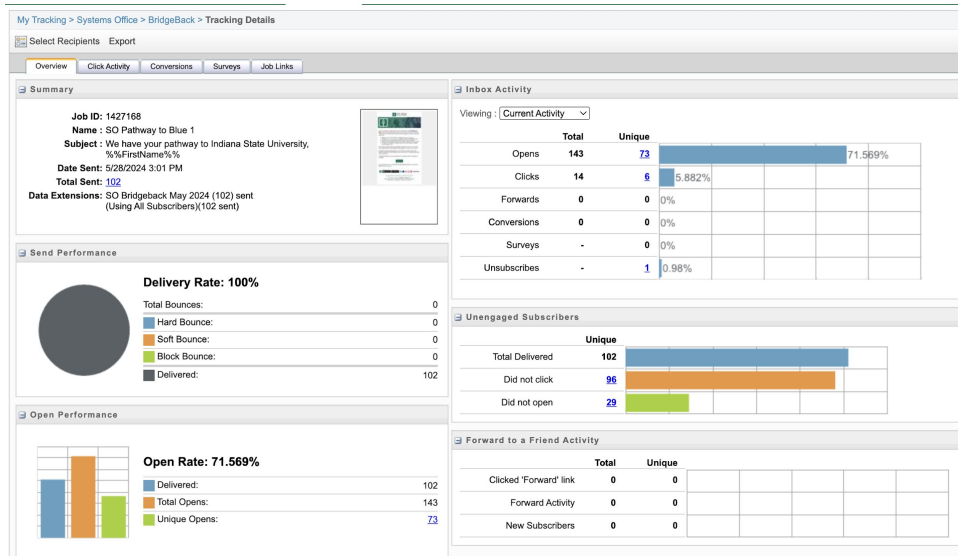
- But with the new AMPscript added, it is capitalized in the message

ANALYTICS AND INSIGHTS

Accessing Email Analytics

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

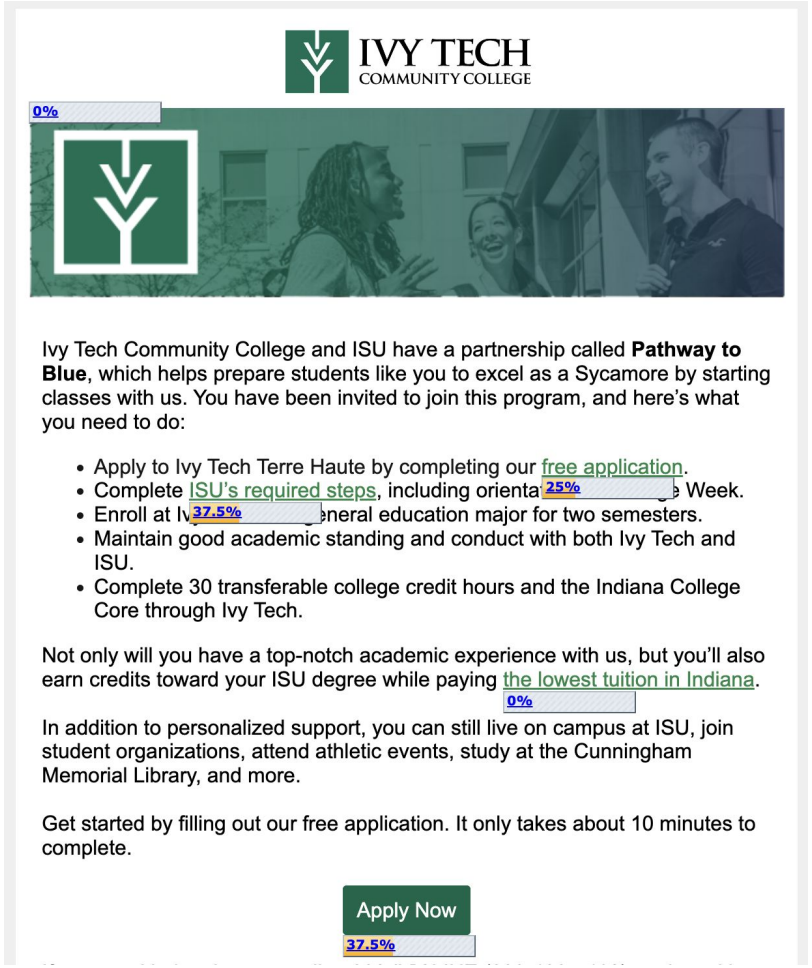
- Clicking on the name gives you extra details
- Your key metrics to watch in these reports are:
  - **Unique opens:** how many opened your message *at least* once
  - **Unique clicks:** how many clicked on *at least* one link
  - **Hard bounces:** how many bad email addresses you have



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.



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