LINK YOUR SALESFORCE DATA USING MARKETING CLOUD CONNECT (MCC201)

OVERVIEW

Discover how to unify and analyze your data in one place with Marketing Cloud Connect. In this 4-day instructor-led course, learn how to seamlessly engage with your customers by linking Marketing, Sales, and Service Cloud. Segment Salesforce data to create personalized, targeted emails in order to track what resonates most with your customers in order to strengthen your relationships with them.

WHO SHOULD TAKE THIS COURSE ?

This course is ideal for email digital marketers responsible for managing the email channel for their organization, Salesforce Admins responsible for supporting users when Marketing Cloud Connect is installed, and customers who will be connecting their Salesforce org to Marketing Cloud using Marketing Cloud Connect.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Explain Marketing Cloud Connect.
- Connect a Marketing Cloud account to a Salesforce org.
- Create individualized content blocks to leverage Salesforce CRM data using personalization strings and dynamic content.
- Create an email in Content Builder.
- Utilize the various sending methods to send to a Lead, Contact, Report, or Campaign in Marketing Cloud and Sales and Service Clouds.
- Automate sending emails using a Triggered Email, Automation Studio, and Journey Builder.
- Configure Synchronized CRM Sources to bring CRM data into Marketing Cloud.
- Segment data using Reports, Filter Activity, and Query Activity.
- Create journeys using Salesforce Activities in Journey Builder.
- Review tracking data in Marketing Cloud and Sales and Service Clouds.
- Create analytics reports in Marketing Cloud.
- Create and customize Marketing Cloud reports in Sales and Service Clouds.
- Create a dashboard based on Marketing Cloud reports.

PREWORK

Please complete the following trailmix before attending our expert-led class : Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class

CERTIFICATION

MCC201 is recommended to prepare Salesforce Certified Marketing Cloud Consultant exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

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DURATION
4 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

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LESSONS & TOPICS

Salesforce Marketing Cloud overview
- Review the Customer Success platform
- Get to know Marketing Cloud

Marketing Cloud Connect
- Review Marketing Cloud Connect
- Review the various ways to connect the Clouds

Marketing Cloud connect configuration
- Explore how to connect the Clouds
- Review the prerequisites for Marketing Cloud Connect
- Review Salesforce terminology
- Connect a Marketing Cloud account to a Salesforce org
- Review prework

Personalized digital marketing
- Review what functionality can be accomplished in each cloud
- Create a personalized email leveraging Salesforce CRM data using Content Builder
- Use testing tools
- Send a Marketing Cloud email manually to a lead, contact, report, and campaign
- Automate the sending of an email via a triggered email, Automation Studio, and Journey Builder
- Understand what happens when an email is sent
- Understand subscriber statuses

Synchronized CRM Data
- Explain how and why to bring Salesforce CRM data into Marketing Cloud
- Synchronize data sources in Contact Builder
- Create segments using filters and the query activity
- Create a Salesforce data extension for sending
- Create a journey using synchronized data sources
- Test a journey

Journey Builder
- Explain Sales and Service Cloud activities
- Create a journey using Sales and Service Cloud activities tracking and reporting
- Understand the tracking data available in Marketing Cloud
- Create and automate tracking reports in Marketing Cloud
- Understand the tracking data available in Sales and Service Cloud
- Create and customize Marketing Cloud reports in Sales and Service Cloud
- Create a dashboard for Marketing Cloud tracking reports