DRIVE SALES WITH ACCOUNT ENGAGEMENT (PDX101)

OVERVIEW

Discover how to drive more qualified leads, nurture prospects through the sales cycle, and sell more effectively with Marketing Cloud Account Engagement. In this 3-day instructor-led course, learn how to design and implement marketing workflows with Engagement Studio to make data-driven decisions and drive your company's business forward. Create and automate dynamic emails, generate and qualify leads, and leverage reports and data in order to boost sales.

WHO SHOULD TAKE THIS COURSE?

This course is designed for marketers and Salesforce administrators who are responsible for designing, building, and implementing marketing workflows and reports with Marketing Cloud Account Engagement. It is also designed for business users who are interested in learning more about Account Engagement. This is also a great foundational course for anyone interested in earning their Marketing Cloud Account Engagement Specialist credential.

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

- Enable Account Engagement.
- Explain the relationship created between Account Engagement and Salesforce.
- Generate leads with Account Engagement's various lead generation tools.
- Manage leads with Account Engagement's lead management tools.
- Engage leads with Account Engagement's lead engagement tools.
- Qualify leads with Account Engagement's scoring and grading functionality.
- Interpret data generated via Account Engagement's reporting capabilities.
- Design successful end-to-end marketing workflows using Engagement Studio.

DURATION
3 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

PREREQUISITES AND PREWORK

Students should have at least two months of experience building marketing workflows with Marketing Cloud Account Engagement.

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

PDX101 is recommended to prepare Salesforce Certified Marketing Cloud Account Engagement Specialist 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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LESSONS & TOPICS

Course introduction
- Review course objectives
- Set learner expectations
- Review housekeeping items
- Review additional course resources
- Explore course case study

Salesforce integration
- Understand the Relationship Between Account Engagement and Salesforce
- Sync data between Salesforce and Account Engagement
- Enable Account Engagement in Salesforce
- Create custom fields
- Review Salesforce campaigns

Administration
- Create an Account Engagement dashboard
- Authenticate your email sending domains
- Sync with third-party applications using connectors
- Restore assets from the recycle bin
- Create and assign users and user groups
- Understand usage governance

Visitors and prospects
- Understand Account Engagement visitors
- Understand Account Engagement prospects

List management
- Create list types
- Organize prospects using static lists
- Test emails using test lists

Personalization and email marketing
- Personalize Emails with Handlebars Merge Language (HML) and Advanced Dynamic Content
- Automate Email Marketing
- Create email templates
- Understand Audiences Using A/B Testing
- Track email performance using email reports

Forms and landing pages
- Capture leads with forms
- Convert visitors to leads using landing pages
- Track leads with forms and landing page reports
- Measure clicks using custom redirects
- Create custom redirect reports

Lead management
- Trigger page actions
- Automate actions from a marketing element using completion actions
- Create a list of prospects and apply a segmentation action using segmentation rules
- Create repeatable, criteria-based automation rules
- Create dynamic lists
- Choose an automation tool

Lead qualification
- Understand prospect scoring
- Grade prospects based on profiles

Lead nurturing
- Build an engagement program
- Create engagement program reports

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