

## **SFMC Training Contents and Curriculum**

### **NO PRIOR KNOWLEDGE OF SALESFORCE MARKETING CLOUD IS NEEDED**

All sessions include continuous practical hands on, whole training is a mix of theory and practical (30:70).

### **PRE-REQUISITE OF THIS TRAINING:**

- Laptop/desktop with good Internet connection.
- Basic SQL queries like Select, Joins, Date/Time functions.
- FileZilla application with PORT 22 Open.
- Postman Application to test API calls.

### **RECOMMENDATION**

- Participants count should be in the range of 10 to 14 pax per batch for smooth and quality delivery of training.

### **TRAINING MODE**

- Gotomeeting (no installation required, web based tool)

## Sender Authentication Package

- Private Domain, Account Branding
- Dedicated IP Address
- IP Whitelist

## Administration

- Users
- Add a User
- Users Roles / Permissions
- Change a User Password
- Disable a User
- Modify User Settings
- Reset a User Password

## Send Classification

- Sender profile
- Delivery profile
- Reply Mail Management
- Subject and Preheader Validation
- List Detectives

## Account Administration

- Create custom Roles

## Business Units

- Create Business Unit
- Assign Business Unit to Users

## FTP Accounts

- Add FTP Accounts
- Modify FTP Accounts

## File Locations

- File Transfer Location
- File Transfer to SFTP

## Data

- Data Overview
- Lists
  - What is a Subscriber?
  - All Subscribers List
  - Publication List
  - Exclusion List
- Data Extensions
  - What is a Data Extension?
  - Sendable and Non Sendable DE
  - Types of Data Extension
  - Import Data into a DE

## Content Builder

- Content Builder Overview
- Uploading Assets into Content Builder
- Content Blocks
  - Create Static Content Blocks
  - Create Individualized Content Blocks Using Personalization Strings, Dynamic Content & AMPscript
  - How to Add Links to Content
- Templates
  - Ways to Create templates
  - Create a Template with Locked Content
  - Configure content in a Content Area in a Template
- Email
  - Create an Email from a Template, HTML, Text.
  - Add Multiple Content Blocks to a Single Content Area
  - Add a Dynamic Content Block

## Testing

- Content Detective
- Validation
- Test Send

## Sending

- User-Initiated Email
- A/B Testing
- Bounce Mail Management
- Global, Master, and List-Level Unsubscribes

## Journey Builder

- Define Journey Builder
- Define an Interaction
- Create an Entry Event
- Utilize various Journey Builder Activities

## Customer Journeys

- Describe why customer journeys are important
- Difference between Automation and Journeys
- Create product review journey (Exercise)

## Analyze Your Results

- Tracking Data
- Standard Reports
- Automating Reports

## Segmentation

- Drag-and-Drop Segmentation
  - Create Random and Filtered Segments
  - Create Segments Using Data relationship
- Refreshing Data
- Query Activity
- Audience Builder Overview

## Automation Studio

- Data Activities
  - Data Extract
  - Import
  - File Transfer
  - Verification and Wait
  - Filter Activity
  - Query Activity

## Cloud Page and Landing Page

- Add data from Landing Page
- Run Journey through Landing page

## Contact Builder

- Define Contact Builder
- Describe and use the various tools in Contact Builder
- Concepts of Subscriber Key, Primary Key, Contact ID and Contact Key

## Amp Script

- Syntax
- Utility Functions
- Data Extension functions

## SQL Queries Joins

## Overview and Functionality of

- API Calls
  - Insert data using API

## DAY 1

30 minutes

180 minutes

### Introductions and Course Overview

### Salesforce Marketing Cloud Overview

- Discuss What each Studio and Builder Does in the Marketing cloud
- Different ways to add data into Marketing Cloud

### Sender Authentication Package

- Private Domain
- Account Branding
- Dedicated IP Address
- IP Whitelist

### Data: Data Extensions

- Types of data extension-Standard,Random, Filter
- Creating Sendable Data Extensions
- Create Data Extension through Templates
- What Field is the Primary Key?
- Import Data to Sendable Data Extension via the Import Wizard
- Difference between sendable & Non-Sendable Data Extensions
- Lists vs Data Extensions

30 minutes

Break (as discussed)

## DAY 2

15 minutes

165 minutes

### Review Day One

### Data: Overview

- All Subscribers list
- Global, Master, and List-Level Unsubscribes
- Profile Center and Preference Center
- Suppression List
- Exclusion List

### Data Lists:

- Create an Attribute
- Creating Lists, Publication List
- Importing Data into List
- Tour of All Subscribers List, Search, Delete, Status
- Data: Contact Builder Overview
- Tour of Contact Builder and Add Record to Data Extension

30 minutes

Break (as discussed)

## DAY 3

15 minutes

165 minutes

30 minutes

## DAY 4

15 minutes

165 minutes

30 minutes

### Review Day Two

#### Segmentation: Drag-and-Drop Segmentation

- Segmentation Overview How Are You Segmenting Your Data?
- Segments using Query
- Filtered Segments
- Create a Filtered Data Extension
- Create a Random Data Extension
- Create a Data Relationship
- Create a Data Filter and Filter Activity
- Segmentation: Audience Builder

#### Data Views in Marketing Cloud

- \_Open, \_Click, \_Sent, \_Job, \_Bounce

Activity: What Segmentation Tool Would You Use?

Break (as discussed)

### Review Day Three

#### Content: Content Builder Overview

- Data Retention settings

#### Content: Upload Content

- Create folder and upload content, Types of supported content

#### Content: Content Blocks Overview

##### Static Content

- Create a static personalized content block
- Individualized Content: Personalization and AMPscript
- Create a personalized Text Content Block
- Individualized Content: Dynamic Content
- Data Relationship

Create a layout content block and dynamic content block

Data Extension best practices

Break (as discussed)

## DAY 5

15 minutes

165 minutes

### Review Day Four

#### Content: Templates

- Creating Templates from existing template
- Create Template from Paste HTML

#### Content: Email

- Different types of Email- Text, HTML Paste, Template based
- Add Dynamic Content Block
- Create User Initiated Email
- Create Trigger Send Email

#### Test

- CAN-SPAM
- Validation
- Test Send

#### Send

- Different types of Sends
- Send the Email via the Send Flow
- A/B Testing Activity
- What Happens When You Send
- Bounce Mail Management
- Manage Unsubscribes
- Create Publication List

#### Analyze

- Email Tracking, Reports
- Review Individual Tracking Results

30 minutes

Break (as discussed)

## DAY 6

15 minutes

165 minutes

### Review Day Five

#### Automation Studio Overview

#### Types of Automation

- Scheduled Automation
- File drop automation

#### Automation Studio Activities

- Send email Activity
- Import Activity
- File Transfer Activity
- Data Extract Activity

30 minutes

Break (as discussed)

## **DAY 7**

**15 minutes**

**165 minutes**

**30 minutes**

## **DAY 8**

**15 minutes**

**165 minutes**

**30 minutes**

### **Review of Day Six**

#### **Types of Automation**

- **Scheduled Automation**
- **File drop automation**

#### **Automation Studio Activities**

- **SQL Query Activity**
- **Filter Activity**
- **Verification Activity**
- **Wait Activity**

### **Break (as discussed)**

### **Review of Day Seven**

#### **Automation Studio Continue**

- **Automate the File Transfer on SFTP**
- **Automate the Import of user data from SFTP**
- **Encrypt/Decrypt File using File Transfer Activity**
- **Transfer File on SFTP using File Transfer Activity**
- **Automate the Refreshing of Segments**
- **Extract Data using Data Extract Activity**
- **Rename File on SFTP using Data Extract Activity**
- **Delete File on SFTP using Data Extract Activity**
- **Move File on SFTP using Data Extract Activity**
- **Pause an Automation**
- **Skip an Automation**
- **Stop a Running Automation**
- **Copy an Automation**
- **Delete an Automation**
- **Automation Studio Errors**
- **Get Automation Studio Notifications**

### **Break (as discussed)**

## DAY 9

15 minutes

165 minutes

### Review of Day Eight

#### Introduction to Journey Builder

#### Difference Between Automation and Journey Builder

#### Journey Builder

- Entry Sources
- Messages
- Flow control
- Customer Updates
- Define an Interaction
- Build an Interaction
- Create an Entry Event
- Utilize various Journey Builder activities
- Difference between Journey and Contact Data

#### Customer Journeys

- Describe why customer journeys are important
- Define the customer journey
- Identify how to create 1:1 customer journeys
- Create Welcome Email Journey using Landing Page

#### Monitoring and Optimizing

- Set a goal
- Test the Interaction
- Create a new version of an Interaction

#### Contact Builder

- Define Contact Builder
- Describe and use the various tools in Contact Builder
- Reiterate the concepts of Subscriber Key, Primary Key, Contact ID and Contact Key

30 minutes

Break (as discussed)

## DAY 10

15 minutes

165 minutes

### Review of Day Nine

#### Journey Builder Exercise

- Create Product Review Journey using Data Extension and Automation

30 minutes

Break (as discussed)

## DAY 11

15 minutes

165 minutes

30 minutes

## DAY 12

15 minutes

165 minutes

30 minutes

### Review of Day Ten

#### Administration

- Send Classification
- Sender profile
- Delivery profile
- Subject and Preheader Validation

#### Account Administration

- Create custom Roles
- Business Units
- Assign Business Unit to Users
- FTP Accounts
- Add FTP Accounts
- File Locations

#### Overview of Marketing Cloud API Calls

##### Install Package in Marketing Cloud

- Create Client ID and Client Secret
- Overview of Postman App
- Generate Authorization Code
- Insert Data using API
- Delete Data using API

### Break (as discussed)

### Review of Day Eleven

#### Overview of Ampscript

- Language
- Syntax, Ampscript blocks
- Functions, Variables, Attributes
- Personalization String
- Attribute string, System string

#### Data Extensions Functions

- LookupRows
- Row
- RowCount
- UpdateData
- UpdateDE
- UpsertData
- UpsertDE

#### Site Based Functions

- QueryParameter
- RequestParameter

### Break (as discussed)