Salesforce Marketing Cloud
Content Builder Transition Webinar
Salesforce Marketing Cloud

Elevating the way we communicate with our members through the tools of Salesforce Marketing Cloud and the data of NEA360
SFMC Classic Editor vs. Content Builder

What you need to know:

- Support/ability to create new content in Classic Email/Classic Editor is going away after January 1st, 2019
- You don’t need to rebuild/recreate all your existing emails/templates/assets in Content Builder!
  - Start importing your classic content emails, templates, content blocks, and assets between now and January 1st, 2019
  - Create an “Imported from Classic Content” folder in Content Builder
  - Import using folders so organizational structure is intact
  - Create an “Imported from Classic Content” folder in Content Builder, and after the import is completed, move everything there
- If you have a custom footer that uses Classic Library content in a delivery profile, you will need to rebuild that footer as a content block in Content Builder to start using it in your new emails
Who’s this webinar for?

Current Salesforce Marketing Cloud users who:

- Create and send emails through Classic Content
- Understand correlations between data extensions and emails
- Understand correlations between images and emails
- Has Send Classifications, Sender Profiles, and Delivery Profiles already created
- Has footers already created
- Understands personalization
For this Session

- Using your existing username and password, log into your SFMC account:
  
  **mc.exacttarget.com**

- Refer to this slide deck to follow along with the presentation on the screen

- Submit any questions you have (at any time or during the Q&A portion) via Adobe Connect’s chat feature
# Agenda Overview

<table>
<thead>
<tr>
<th>What are we doing?</th>
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<td><strong>Part One:</strong>  &lt;br&gt;November 8  &lt;br&gt;3:30PM-4:30PM</td>
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<td>Log-in to SFMC  &lt;br&gt;Welcome &amp; Agenda Review; Content Builder Overview  &lt;br&gt;Creating Emails with Content Builder:  &lt;br&gt;Creating Templates, emails, content blocks  &lt;br&gt;Uploading and using assets  &lt;br&gt;Headers and footers/CAN-SPAM regulations  &lt;br&gt;Personalization  &lt;br&gt;Planning dynamic content</td>
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Creating Emails with Content Builder
Content Builder

- Create and manage emails, templates, content blocks, and assets in a central location
- Easier wizard for creating emails
- Preview email while editing
- Automated validation and email detective
Folder Structure

- Keep all related items within a single folder including sub-folders.
- Properly name folders (avoid vague names such as `folder01`).
- Ex: Newsletters
  - NEAToday Express - ChLopez
    - 01 – Email
    - 02 – Assets
    - 03 – Templates
    - 04 – Content Blocks
Uploading and Using Assets

- Upload and store assets
  - Images – JPEG & PNG only
- Upload documents
  - PDF recommended
- Manage assets in Content Builder using folders
  - Emails
  - Assets
  - Content
  - Templates
Creating Templates

- Define overall structure/layout of email
- Create within Email studio or Content Builder
- Save for later use for consistent look/feel across multiple emails
- Control standardized content for consistent branding across emails and campaigns
- Use placeholders for creating/adding content
Creating Content Blocks

- Use content blocks to create reusable modular content for messages
- Manage content blocks in Content Builder
Creating Emails

- Select a template to create email
  - From existing or new
- Insert/modify content blocks
  - New or saved assets
Headers and Footers

**EITHER**

- Create and save headers/footers as reusable Content Blocks to insert in every email
  - User is responsible for complying with CAN-SPAM

**OR**

- Use Delivery Profiles

*Remember:* Non-transactional emails must display “Unsubscribe” link and clearly identify the sender
CAN-SPAM Act

- Applies to both bulk emails and commercial messages
- Main requirements around:
  - False or misleading headers/deceptive subject lines
  - Telling recipients your location/how to opt out, and honoring opt-out requests promptly
  - Monitoring what others are doing on your behalf

Personalization

- Personalization strings let you insert subscriber attributes into emails (ex: subscriber first name)
  - Can appear in subject line, preheader, or content of email
- Avoid using system data personalization strings
- Personalization strings can be inserted into HTML or text editor
- Ex: %%(IF LENGTH(TRIM([First_Name])) > 1 THEN %%%%=%ProperCase([First_Name])=%%%% [ ELSE ]%% Friend%%[ ENDIF ]%%

Using AMPscript:

%%=IIF(Empty([FirstName]), “Welcome to the NEA!”,”Concat(ProperCase([FirstName]),”,
welcome to the NEA!”))=%%

Susan, welcome to the NEA!
Welcome to the NEA!
S, welcome to the NEA!
Personalization – Tips:

- All personalization strings are case-insensitive
- Always include the two sets of double percent symbols (%%string%%)
- String will appear blank in email if subscriber attribute isn’t populated in data extension for a particular personalization string
  - Define a default value for every attribute
- Do not include personally identifiable information (such as email address) in email links
Questions?
Sending Emails with Content Builder
## Welcome Back: Agenda Review

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Creating Data Extensions

- Data extensions represent tables containing attributes and related values pertaining a contact.
- Data extensions form the basis of contact information within Salesforce Marketing Cloud.
- By creating and linking data extensions, you can access information about contacts and use that information to segment, filter, and target contacts with relevant sends.
- Data extensions can be created in both Email Studio and Contact Builder.
Publications Lists

- Use publication and suppression lists to manage opt-ins for your email account in Email Studio.
- Use either publication lists or suppression lists to control how subscribers receive your sends.
- Choose a publication list when sending email messages and to a sendable data extension.
Implementing Dynamic Content

- Multiple content blocks are needed
- Individual data records determine which content block is used
- Email send process allows testing of dynamic content based on sendable data extension
Planning Dynamic Content

- Analyze data extension to select which field will determine the content block used to segment the email.
- Create **Locked Content Blocks** for each variable on the selected field.
- Select a block on the template to place dynamic content within the body of the email.
Test Sends

- Test emails before sending to the full list to increase open/click-through rates.
- Tests allow you to view:
  - Personalization
  - Dynamic content
  - Formatting
Validation

- Validation automatically applied for common issues that could prevent email from being sent:
  - Unsubscribe link
  - Physical mailing address
  - Correct syntax for attributes
  - Each content area specified in dynamic content rule exists
  - Content detective to catch red-flag phrases

- Use **Content Detective** to validate further (i.e., catch red-flag phrases) and make necessary corrections before starting the send process
Sending an Email

- Email Wizard walks you through sending process
- Full summary before send
- Final check box to confirm send
A/B Testing

- Test out various subject lines (among other things) to small group

**Options:**

- Select winner and initiate send manually
- Have SFMC choose winner and send automatically

- Get reports on most successful subject lines (or other content tested)
Calendaring Move from Classic

- Support and ability to create new content in Classic Editor going away as of January 1st, 2019
  - Can import Classic content between now and January 1st, 2019
  - After January 1st, 2019, you can still access Classic content, but can no longer automatically import
  - Classic feature shut down/inaccessible as of June 1st, 2019

- Follow prompts throughout Salesforce Marketing Cloud to import/save all Classic Content

Check out http://help.marketingcloud.com/Import_Content
Additional Resources

- Content Builder Instructions
- Content Builder Best Practices
- Create and Send Targeted Emails with Email Studio (Trailhead)
- Create Compelling Content with Content Builder (Trailhead)
Questions?
Webinar Survey

● Please complete the survey below:
  ● http://nea.org/SFMCWebinarSurvey
Thank you for coming!

Email us if you have questions you didn’t get to ask

SFMCHelp@nea.org