

salesforce

Deliver Impactful Messages with Email Marketing

Inside Out of the Box

Karmel James, Senior Salesforce Administrator

Chris Zullo, Marketing Cloud Practice Director

@armejam44 | @chriszullo





Karmel James

Senior Salesforce Administrator
Viz.ai



Chris Zullo

Practice Director, Marketing Cloud
AllCloud

Overview

Session Outline



Introduction

Process

Automation

Testing

Analytics

Documentation

Resources + Summary

Q&A

Process



Decisions, Decisions, Decisions

Audience

Messaging

Call to Action

80/20 Rule!

Automation

Sales & Marketing Alignment

Change Management

User Adoption

Time Management

- Campaign Management

Content Calendar

Content Curation

Approval Process

Channel Management

Paid Ads/Social

AI (Artificial Intelligence)

Customer Journey Mapping

Budget Procurement

Scoring + Grading

Integration (System Architecture)

Marketing Automation



Don't Set and Forget

Lead Management

Nurture

Qualification

Conversion

Dynamic vs. Static Segmentation

Actions

Engagement Programs

Integration / Synchronization



Testing



You want me to do what?

Happy Path

Edge Cases

A/B Testing

Unexpected responses

Divide & Conquer

Acceptance Criteria

UT vs. UAT

- UT = Unit Testing
- UAT = User Acceptance Testing

Analytics



Not Just a Bunch of Numbers

Benchmarks and KPI development

Forecasting

Opt-Outs

Open vs. Click Rates

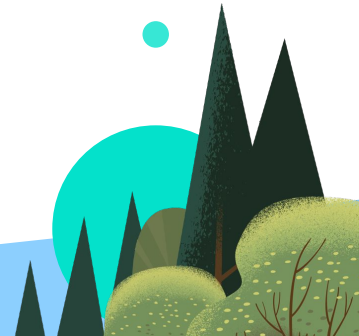
Bounce Rates

ROI

Campaign Attribution

Conversion Rates

Channels



Documentation



Future You Thanks You (IN ADVANCE)

Requirements

Reasoning for decisions

Process Journey

Automation Triggers

Testing Scripts

Description IS NOT NULL





Resource For Success

Email Marketing Checklists



Checklist for Thought



Process Checklist

Target audience?

Call to action?

Content schedule?

Messaging tools?

A/B Testing?

Automation Checklist

What can be automated?

What should be automated?

What should NOT be automated?

What happens if the automation fails?

Testing Checklist

Who is testing the process?

What needs to be tested?

What is the happy path?

What are the edge cases?

What is not being tested?



Checklist for Thought



Analytics Checklist

How do you measure success?

Do sales and marketing track the same metrics?

Are sales and marketing aligned?

Any other teams involved or should be?

Documentation Checklist

Who is going to read this?

Where will it be kept?

How will this be distributed?

What questions came up during the project?

What new information was learned?

Summary

Cohesive **Processes**

Thoughtful **Automation**

Make **Testing** Great Again

Meaningful **Analytics**

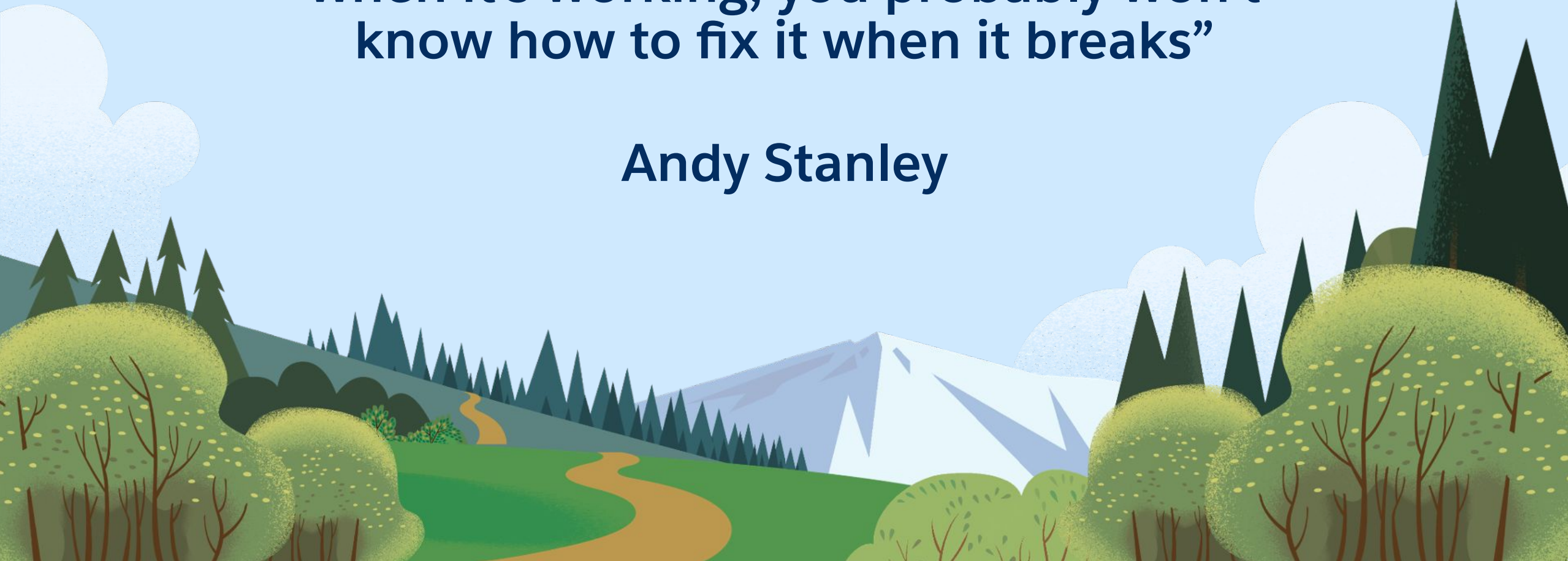
Page Turning **Documentation**



Start with a Plan

“If you don’t know why it’s working when it’s working, you probably won’t know how to fix it when it breaks”

Andy Stanley





Appendix



Process Checklist



1. What audience will be targeted?
2. What is the call to action?
3. Where does this fall in the content schedule?
4. What mediums will be used to transmit the messaging?
5. What A/B testing is needed, if any?
6. Is this material for Sales to use in outbound prospecting or is pure Marketing effort?



Automation Checklist

1. What can be automated?
2. What should be automated?
3. What should NOT be automated?
4. What happens if the automation fails?
5. Should any of your automations initiate another automation or process?

Testing Checklist



1. Who is testing the process?
2. What needs to be tested?
3. What is the happy path?
4. What are the edge cases?
5. What are the anticipated results for a happy path test? For an edge case?
6. What is not being tested?
7. What assumptions are being made?
8. Where in the standard testing steps can someone exit the experience and attempt to rejoin?
9. Where are automations triggered in the testing steps?



Analytics Checklist



1. How do you measure success?
2. Do sales and marketing track the same metrics?
 - Are sales and marketing aligned?
 - Any other teams involved or should be?
3. Do you have defined KPIs?
4. What types of reports do you need and who should see them?
5. Do you need a dashboard? If so, who is the audience?
6. Are these metrics reviewed regularly by the organization to evaluate whether these are still accurate and relevant for the organisation?



Documentation Checklist



1. Who is going to read this?
2. Where will it be kept?
3. How will this be distributed?
4. What questions came up during the project?
5. What new information was learned?
6. What were the steps taken to test?
7. Who were the stakeholders on the project?
8. What is automated and why?