

A Metia 'How to Guide'

Nine simple tips to get the most from Salesforce Marketing Cloud



metia



Make the most of our experience

Whether you call it the Salesforce Marketing Cloud or ExactTarget, your email platform was an important investment.

Our team works with Salesforce Marketing Cloud for clients every day, helping them to engage customers around the world. We are continually learning new tricks and short cuts that help our clients get the most value from their email platform.

We've gathered nine of our best "getting started" tips in this How to Guide.

If you want to learn more about how to get more from your email marketing program or the Salesforce Marketing Cloud contact us at info@metia.com or www.metia.com. We'd love to hear from you.

1

Improve your delivery performance: make sure you have a warm IP

Before you start to deliver business critical email campaigns, first make sure you have established a good reputation for your IP address.

Downloads

[Full IP warming guide](#) ↓

IP addresses are the one bit of data that malicious senders and spammers can't forge, which is why the past behavior of an IP address is treated as the best predictor of a sender's future behavior.

Questions that ISPs consider when measuring an IP address' reputation

- How many non-existent email addresses is this IP attempting to deliver to?
- How many abandoned email addresses is this IP attempting to deliver to?
- How many "known bad" email addresses (spamtraps) is this IP attempting to deliver to?
- How many recipients complain about receiving this mail?
- Does this IP send messages that are hard to download or have large file sizes?
- Does this IP keep connections open for long periods of time?
- Does this IP retry deliveries too aggressively?
- Does this IP stop mailing addresses after receiving a 'user unknown' message?
- Is this IP address configured as if the associated machine were infected by a virus?
- Is this IP address listed on blocklists?

New SFMC accounts are provided with an IP address that does not have a reputation with ISPs, and no sender reputation is not much better than a bad reputation. Failure to warm your IP address can cause deliverability issues such as a blocked IP, which will send all messages from your IP directly to SPAM folders.

A thirty-day sending history with quality subscriber interactions will establish your positive sender reputation, and ISPs will be more inclined to accept your messages.

During the reputation-building period you should:

- Throttle outbound sends to keep outbound volumes within warming thresholds.
- During the first week of warming the IP address, send no more than 20,000 emails per day to a single domain (5000 to AOL).
- Outbound volumes can double every week for six weeks, at which time you can send to your full list.
- Send messages to your most active and engaged subscribers, encouraging them to mark your emails as 'not junk'.
- Your subscribers' interactions with your emails will be the basis that ISPs use to determine your reputation, and you want the recipients to open, click, and forward the messages sent during the IP warming period.

2

Accelerate your template setup with the BrandBuilder tools

BrandBuilder's smart template suggestions will help you to speed up the creation of emails and ensure greater brand consistency.

Downloads

[Documentation](#) ↓

The SFMC BrandBuilder provides a fast and friendly shortcut to template design by recommending color palettes based on your company logo, and then applying the color scheme to the following areas:

- Logo and header background color on every screen
- Primary navigation buttons
- Login screen
- Survey landing page
- Forward to a Friend landing page
- Profile Center
- Subscription Center

Before



After



3

Build your contact list quickly: offer multiple subscription options

If you want to build a vibrant email program quickly, offer multiple subscription options, even in advance of those options being available.

Downloads

[Documentation](#) ↓

There are several types of emails, and over the course of any email program, more than one type of email will probably be warranted.

By planning for different communication types early in your email program, you can implement list segmentation and subscription options from the onset. This will save headaches later, if you add new types of messages to your program.

The most common types of email:

- **Newsletters and digests** – a collection of stories around a particular theme, sent at a predictable frequency.
- **Dedicated emails** – stand-alone messages with an offer or announcement.
- **Lead nurturing** – a series of emails with a common purpose and call to action.
- **Transactional emails** – messages that are triggered by an action that your customer has taken, such as a sign up, subscription, or purchase.
- **Sponsorship emails** – when your content is included in someone else's newsletter.

4

Learn from every email you send: find and use the reporting features

Email provides marketers with constant feedback on user behavior and preferences. The reporting features of SFMC will help you improve effectiveness.

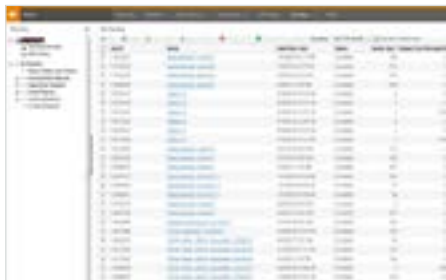
How to find Reporting



1. Open the email application



2. Click the Tracking tab



SFMC has a robust reporting toolset, which includes metrics for deliveries, bounces, opens, clicks, survey responses, conversions, forwards, complaints, and unsubscribes. The first challenge many SFMC users face is not interpreting the data – it's finding it.

Look at trends in your email performance, in addition to the stats for any isolated message. Here are some tips to keep engagement strong, based on typical metrics:

Deliveries and bounces:

To keep deliveries high and bounces low, make sure your list is current, accurate, and clean. Too many bounces will negatively affect your IP reputation, so you should remove bad addresses prior to sending your message.

Opens:

The next most important tactic to increase open rates is to have a compelling subject line. Subject lines should be short, descriptive, and create curiosity. Best-performing subject lines have no more than 50 characters. Four

words to avoid are: Free (which triggers SPAM filters); Help; Percent off; and Reminder.

Click-through rates:

List quality has a major impact on click-through rates. Well managed subscriber lists with high-quality contacts that are properly segmented consistently see higher click-through rates.

5

Determine if it is better for you to use lists or data extensions

When you start using SFMC, you must choose between using lists and data extensions.

Downloads

[Documentation](#) ↓

What's the difference?

List: a compilation of subscribers that receive your communications.

Data extension: a table within the application database that contains your data. A data extension can store sendable subscriber data like lists, as well as house relational data. Data extensions import more quickly than lists, making them suitable for large subscriber databases.

How do you choose?

Use the list model if:

- Your lists will include 500,000 subscribers or fewer, long-term.
- You prefer simplicity to performance.
- You will use a limited number of subscriber attributes.
- You use the XML API.

Use the data extension model if:

- Your lists will include more than 500,000 subscribers.
- You support multiple subscriber data sets with separate keys.
- You send messages to multiple countries.
- You require fast import speeds.
- You implement triggered sends.
- You use the SOAP or REST APIs.
- You prefer a flexible subscription model.

6

Did you choose data extensions? Then you need unique identifiers

Without unique identifiers you may lose the capacity to gather data on your subscribers' actions.

Links

[More on data relationships](#) >

When using data extensions you should include a unique identifier for each subscriber, or use relational data extensions so that tables can be joined back to your subscriber data tables. A unique identifier is a profile field that does not occur in more than one profile.

The most common unique identifier is the subscriber's email address, but there are circumstances where an alternative ID such as an automatically generated number, Salesforce ID, or external ID should be assigned.

7

Use third-party tools to make sure your emails will look great

Using a few carefully selected external services will help you ensure the quality of your email presentation across a variety of email clients and devices.

Have you considered how your email will display on different email clients? Most emails are designed in HTML, and a message may look amazing in a web browser then fall apart when viewed in an email client.

Render test emails before deploying to your subscribers to make sure that they see the message as you intended. The old school method for testing email rendering is to send tests to multiple fake email addresses to be retrieved through different clients, on different browsers, and with multiple devices. There are more efficient tools available.

Tools we recommend

Litmus.com

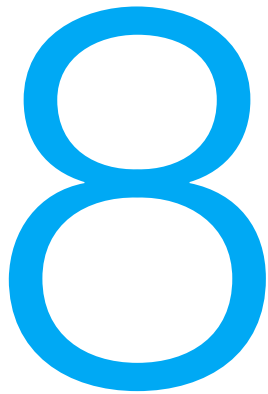
Litmus will create previews of emails across 30+ most common email clients. Litmus also offers interactive troubleshooting that makes it possible to make changes to the message's HTML in real-time to fix render issues in trouble-prone clients like Outlook, Lotus Notes, and Gmail.

<http://litmus.com/email-testing>

EmailonAcid.com

This service will show you how your email will look in multiple email clients and mobile devices so you can fix any rendering issues before you hit send. Emailonacid tests seven operating systems, six web browsers, and 40 email clients. This tool identifies specific lines of HTML code that are not supported in each email client.

<http://www.emailonacid.com/>



Put testing at the heart of your email program

Frequent testing improves the effectiveness of your program, and increases the expertise of your team.

Links

[Documents >](#)

Test and tweak often, and build testing and data analysis into the rhythm of your email processes.

Email test data begins aging immediately. Test delivery factors such as time of day and day of week a few times a year.

SFMC has a robust A/B testing module that can be used on your very first send.

SFMC's A/B testing module allows you to test two different email components on a subset of subscribers. Whichever performs better among that subset is then automatically sent to the remaining subscribers.

What should you test?

- **Subject lines**
- **Email content**
- **Content areas**
- **From names**
- **Send days/times**
- **Preheaders**

9

Review these helpful email development resources

Your best email development resource is a professional with experience building, testing, and optimizing email marketing programs. The technology and platforms for email marketing have matured, and new methods for delivering optimized ROI on email programs emerge every day.

In addition to working with experienced email professionals, we've provided some resources that can enrich your strategies for building high performance emails.

Responsive email framework:

Quickly create responsive HTML emails that work on any device & client – even Outlook.

<http://zurb.com/ink/>

Bulletproof background images:

Use rock-solid background images in your HTML email with some help from VML and CSS.

<http://backgrounds.cm/>

Bulletproof email buttons:

Design gorgeous buttons using progressively enhanced VML and CSS.

<http://buttons.cm/>

SFMC documentation

SFMC has a vast library of resources that can help to resolve nearly any challenge with the platform you may face. You can find the library, which includes code examples and sample scenarios at:

<https://help.exacttarget.com>

Glossary of basic terms

AB Test

A randomized experiment with two variants, A and B, which are the control and variation in the controlled experiment. The goal is to identify changes that increase or maximize an outcome of interest.

As the name implies, two versions (A and B) are compared, which are identical except for one variation that might affect a user's behavior.

CAN-SPAM Act

A law that sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations.

Data extensions

A table within the application database that contains your data.

Email domain

The name of a network or computer that is linked to the Internet. You can find the domain in an email address after an @ sign.

Email template

An HTML document. The coding tells the reader's email program how to render the email message.

IP address

A unique string of numbers separated by periods that identifies each computer using the Internet Protocol to communicate over a network.

ISP (Internet Service Provider)

A company that provides access to the Internet.

Known bad

An email address used to expose illegitimate senders who add email addresses to their lists without permission. They are also set up to identify email marketers with poor permission and list management practices. See 'Spam trap'.

Lists

A compilation of subscribers that receive your communications.

Publication list

Helps you manage how subscribers receive several categories of emails or SMS messages.

For example, you might send newsletters, advertisements, and alerts. Each of these is a different category, so you can create a separate publication list for each category.

REST API

Representational State Transfer (REST) is an architectural style consisting of a coordinated set of architectural constraints applied to components, connectors, and data elements, within a distributed hypermedia system. REST ignores the details of component implementation and protocol syntax to focus on the roles of components, the constraints upon their interaction with other components, and their interpretation of significant data elements.

SOAP (Simple Object Access Protocol)

A way for a program running in one operating system to communicate with a program in the same or another operating system by using HTTP and its Extensible Markup Language as the mechanisms for information exchange.

Spam trap

An email address used to expose illegitimate senders who add email addresses to their lists without permission. They are also set up to identify email marketers with poor permission and list management practices. See 'Known bad.'

Subscriber definition

A text field that contains a value to uniquely identify a subscriber. Used to determine:

- If a subscriber already exists in the system.
- If a subscriber appears multiple times on a list, group, or data extension to be sent a message.
- Which subscriber record to update when subscribers access their profile center or subscription center.
- Which subscriber record to unsubscribe when subscribers unsubscribe.

XML API

SAX (Simple API for XML) is an event sequential access parser API developed by the XMLDEV mailing list for XML documents. SAX provides a mechanism for reading data from an XML document that is an alternative to that provided by the Document Object Model.

Contact

Learn more about our email marketing capabilities

 info@metia.com

Find out more about us here

 [@Metia](https://twitter.com/Metia) www.metia.com