

Follow us on Youtube for latest Accelerator videos: @TableauAccelerators

SALESFORCE DATA CLOUD - EMAIL MARKETING CAMPAIGNS

This Tableau Accelerator allows you to:

- Assess & Improve the efficiency of your marketing campaigns
- Identify most impactful campaigns
- Audit the results of campaign optimization over time

Monitor and improve KPIs

Campaigns

- **Nb of Campaigns:** Total number of marketing campaigns that were launched over the period

Reach

- **Total Sent Emails:** Total Sent Emails
- **Total Delivered Emails:** Total Delivered Emails
- **Delivery Rate:** Share of emails that were delivered on total sent emails. It determines the level of quality and reliability of your emails list

Engagement

- **Total Opened Emails:** Total Open Emails
- **Open Rate:** Open Rate is useful for tracking the percentage of subscribers who open a specific email, open rate gives you insight into how engaged your subscribers are, as well as how effective different subject lines are
- **Total Unique Clicks:** Total number of Clicks on action link (unique)
- **CTR (Click-Through Rate):** Click-Through-Rate: measure what percentage of subscribers clicked on your links (expressed in %). It helps you determine how well your campaigns are performing
- **CTOR (Click-To-Open Rate):** CTOR: The number of clicks out of the number of emails opened. Measures how engaging is the content to the users who view it (expressed in %)

Unsubscribe

- **Total Unsubscribe Clicks:** Total number of unsubscribe (unique)

Getting Started Steps

1. Ensure you have Tableau Desktop version 2020.4 or higher installed and it is licensed.
2. Ensure the Tableau has been provisioned access to pull data from Salesforce Data Cloud. There is great documentation on how to do this on Salesforce Data Cloud [Help site \(https://help.salesforce.com/s/articleView?id=sf.c360_a_tableau_connector.htm&type=5\)](https://help.salesforce.com/s/articleView?id=sf.c360_a_tableau_connector.htm&type=5)
3. Download the Tableau Workbook using the Download button in the upper right portion of this page.
4. Double click to open the downloaded workbook. The workbook will have demo data when you first download it.
5. Once you open the workbook, click on the Data Source tab in the lower left corner of the Tableau dashboard.
6. Authenticate into your Salesforce Data Cloud account. Follow the instructions and log in to Salesforce Data Cloud for Tableau to establish a connection. Note: we recommend users to execute the queries in "Extract" mode. Extract creation against your Salesforce Data Cloud data might take some time depending on the data volume in your Salesforce Data Cloud.
7. After refreshing data and/or creating an Extract, check and if necessary modify the following [Tableau calculated fields \(https://help.tableau.com/current/pro/desktop/en-us/calculations_calculatedfields_create.htm#edit-a-calculated-field\)](https://help.tableau.com/current/pro/desktop/en-us/calculations_calculatedfields_create.htm#edit-a-calculated-field) to match your settings:
 - Field name "Is Delivered Email?"
 - Field name "Is Sent Email?"
 - Field name "Is Unique Click?"
 - Field name "Is Unique Open?"
 - Field name "Is Unsubscribe?"
8. The Accelerator shows data from the following Salesforce Data Cloud standard objects in Tableau when these objects are successfully populated with data in the Salesforce Data Cloud.
 - Object "Campaign" → Object API Name "Campaign__dml"
 - Object "Email Engagement" → Object API Name "ssot_EmailEngagement_dml"

Answer key business questions

- What is our click-through rate (CTR)? How does it evolve across time?
- Which campaigns generated the most engagement?
- How many recipients unsubscribed?

Required attributes

- **Campaign** (*string*): Advertising campaign
- **Date Sent** (*date*): Reference date
- **Nb Sent Emails** (*numeric*): Number of sent emails
- **Nb Delivered Emails** (*numeric*): Number of delivered emails
- **Unique Open** (*numeric*): Number of opened emails
- **Unique Clicks** (*numeric*): Number of clicks
- **Unsubscribes** (*numeric*): Number of unsubscribes

Mapping

- **Object "Email Engagement"** → Object API Name "ssot_EmailEngagement_dml"
 - Field name "Engagement Channel Action" → Field API Name "ssot__EngagementChannelActionId__c"
 - Field name "Engagement Date Time" → Field API Name "ssot__EngagementDateTm__c"
- **Object "Campaign"** → Object API Name "Campaign__dml"
 - Field name "Name" → Field API Name "Name__c"