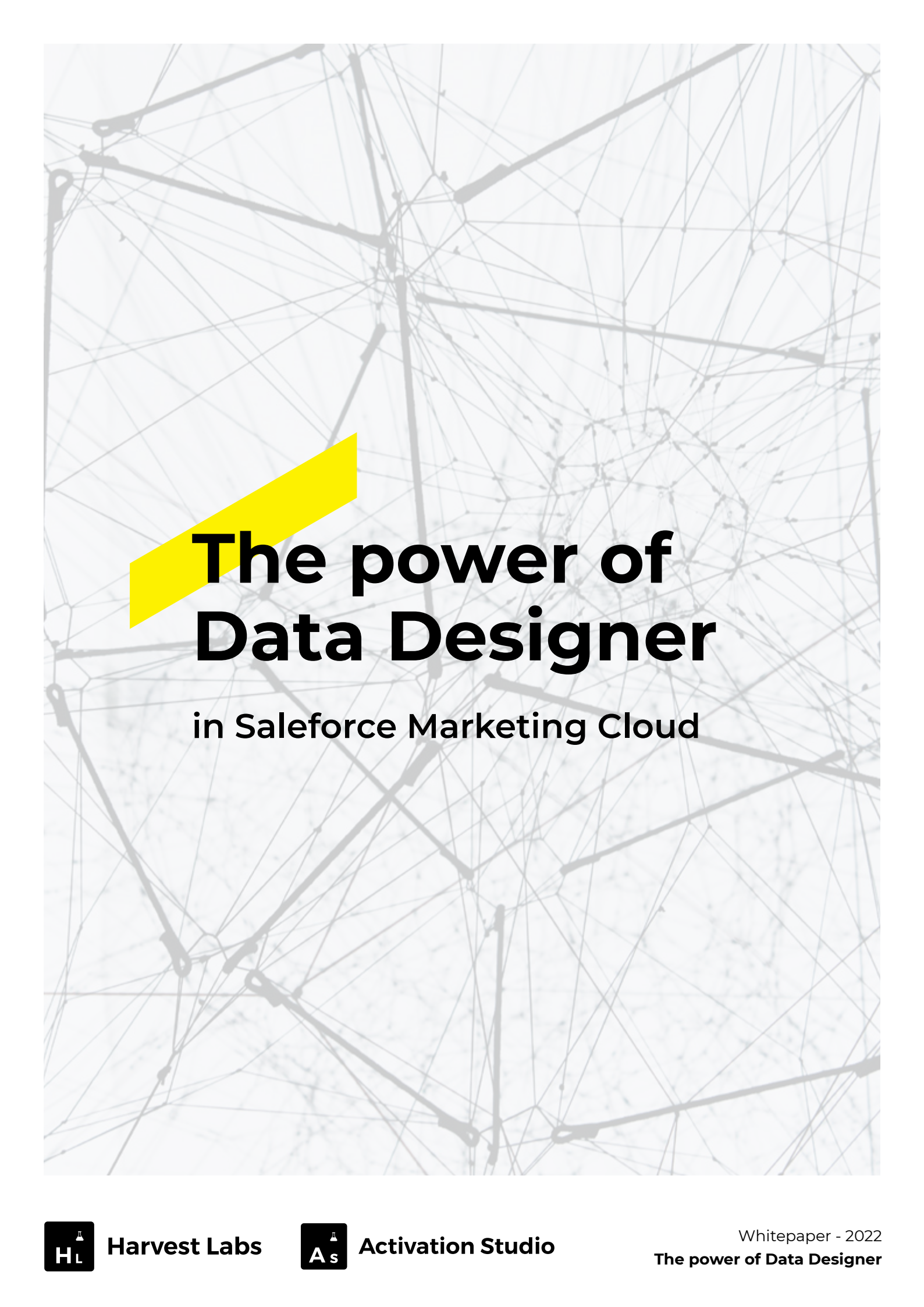




The power of Data Designer

in Salesforce Marketing Cloud



Harvest Labs



Activation Studio

Whitepaper - 2022
The power of Data Designer

Contents of the whitepaper

- Segmentation and personalization
- What is Salesforce Marketing Cloud?
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- What is Activation Studio
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Book your demo now →

Extra: Tips for use of Data Designer

Segmentation and personalization

Wouldn't it be weird;

starting every conversation with friends with the same questions? What's your age, where do you work, where do you live? The same with your customers, you know things about them, why not continue the conversation?

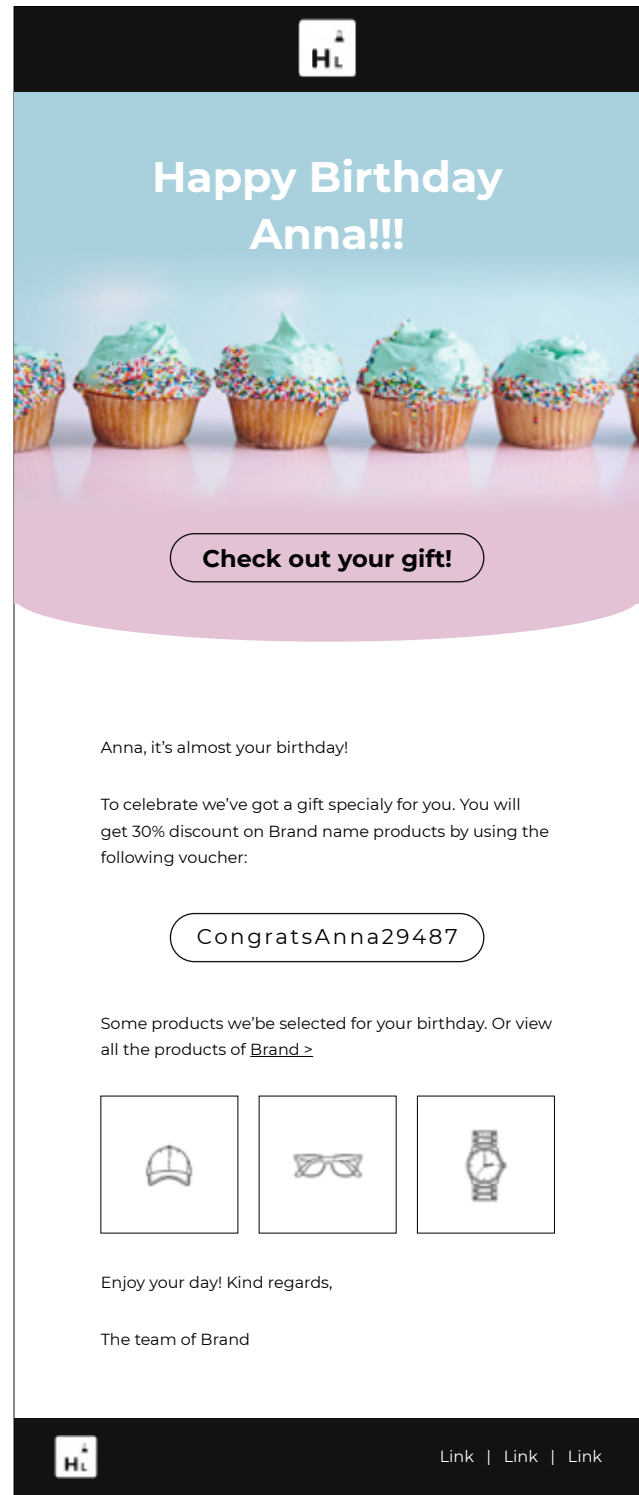


Segmentation and personalization

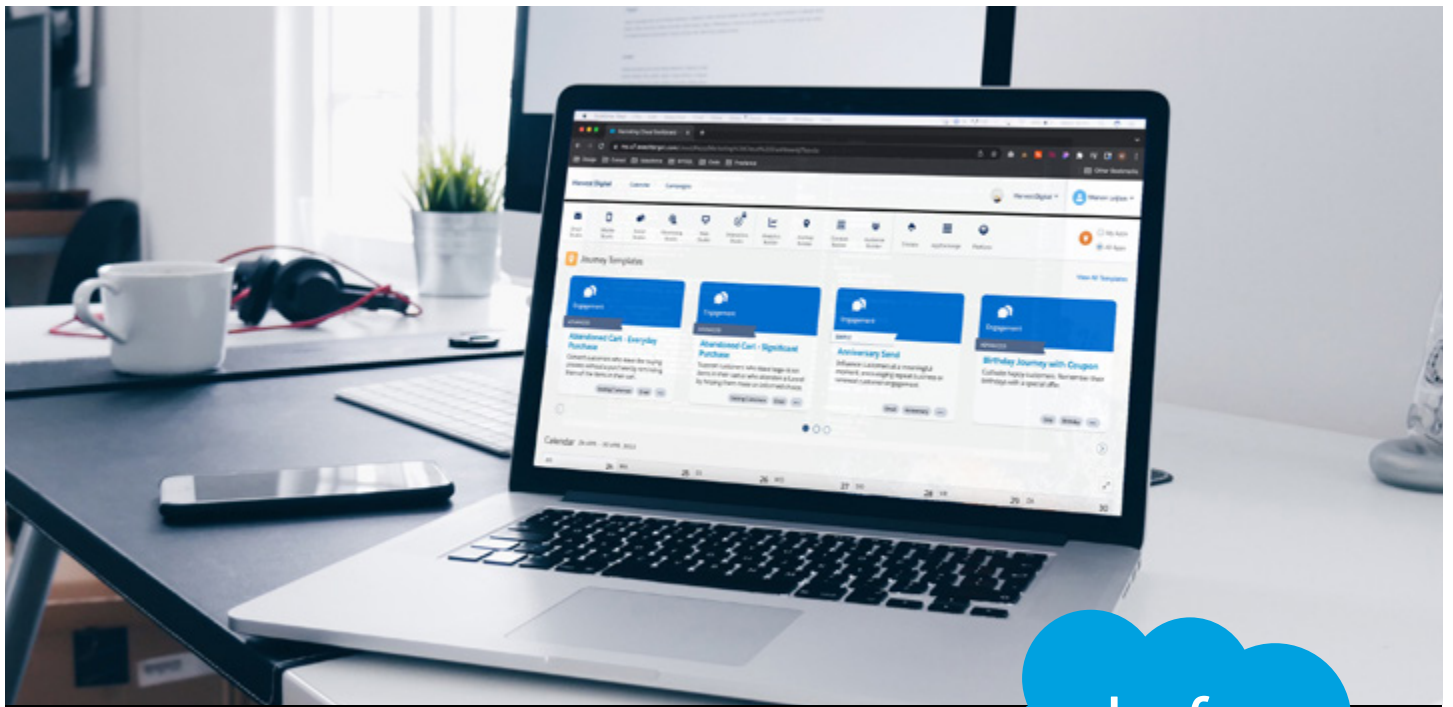
The benefit of using 1st party data is: you know things about your customers. Depending on your field you know things that can help with communicating with your customers in a manner that's relevant for them.

It doesn't stop there, you can get to know your customers even better by engaging with them. Finding out what sort of products they like, what their style is and when it's their birthday.

By segmenting your database you can get a more tailored message to a specific group of customers in your database. Did they buy a specific product, or product from a specific brand. They might be interested in products or services that match that product or brand. Learning more about them and send them information that's relevant.



An example of an personalized birthday message



salesforce

What is Salesforce Marketing Cloud?

Salesforce Marketing Cloud is a digital marketing automation and analytics platform. With Marketing Cloud you can build customer relations with data-first digital marketing. Whether it's email, marketing automation, digital advertising, data management you can get your personalized segmented marketing message to your customers.

With the journey builder you can create engaging customer experiences. You might have various sources of data relevant to communication. To make sure you're connecting all the data in a correct way, you can use Data Designer.

What is Data Designer?

How does Marketing Cloud know how to link all the data together? That's something you can manage with Data Designer. Data Designer is a powerful tool within Marketing Cloud that links data together by using relationships between the data sets.



What is Data Designer?

Let's take Anna as an example.

Anna is your customer, she has bought various beauty products and is a happy customer. We know the details of Anna because of her previous purchases, that data is shared with Marketing Cloud via a shared data extension that is linked to Salesforce Core.



Name:
Anna Janssen

Favorite brands:
Brand Name

Country:
Netherlands

Age:
22

Loyalty level:
Golden

Preferred shop:
Amsterdam

That's not all we know about Anna. Anna also filled in an interactive email where she provided us more information about her interests, which brands she prefers, which type of perfume fragrances she likes etc. We also know which loyalty group she belongs to. This data is stored in different ways in

different places (data extension). To get a full view on Anna and create personalized journeys we can use Data Designer.

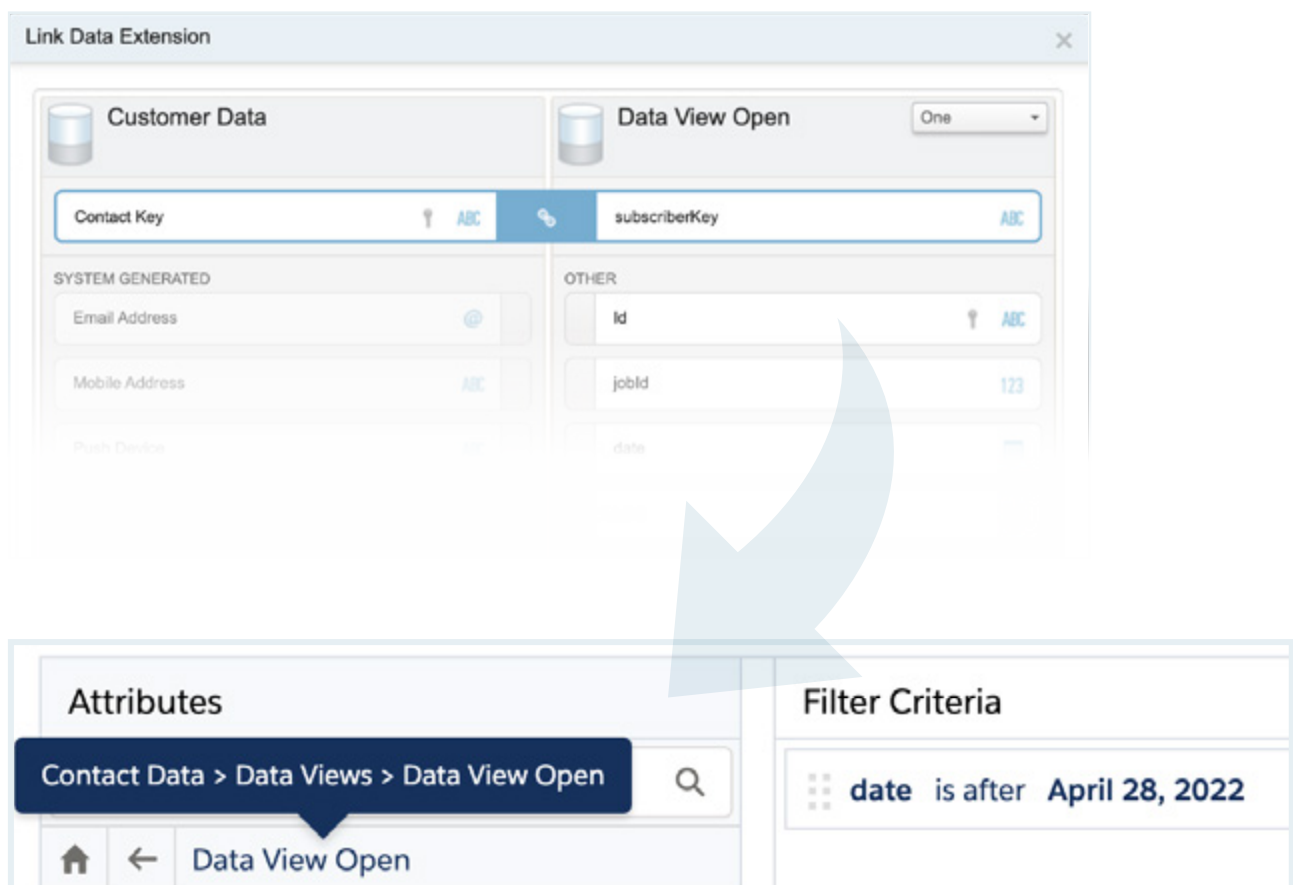
With each relation we can pick an identifier that they've got in common to connect datasets. One-to-One, population, One-to-Many or Many to Many relationships gives

What is Data Designer?

you a lot of various ways to link data to each other. The identifier that the datasets could have in common could be the SubscriberKey.

By mapping them Salesforce Marketing Cloud knows which rows belong to the same person.

By doing this data relations become visible within journey builder and Activation Studio therefore there is no need to create difficult SQL queries to get the result you wish for. Also a big plus, you keep the data clean in the relevant database and always use up to date data.

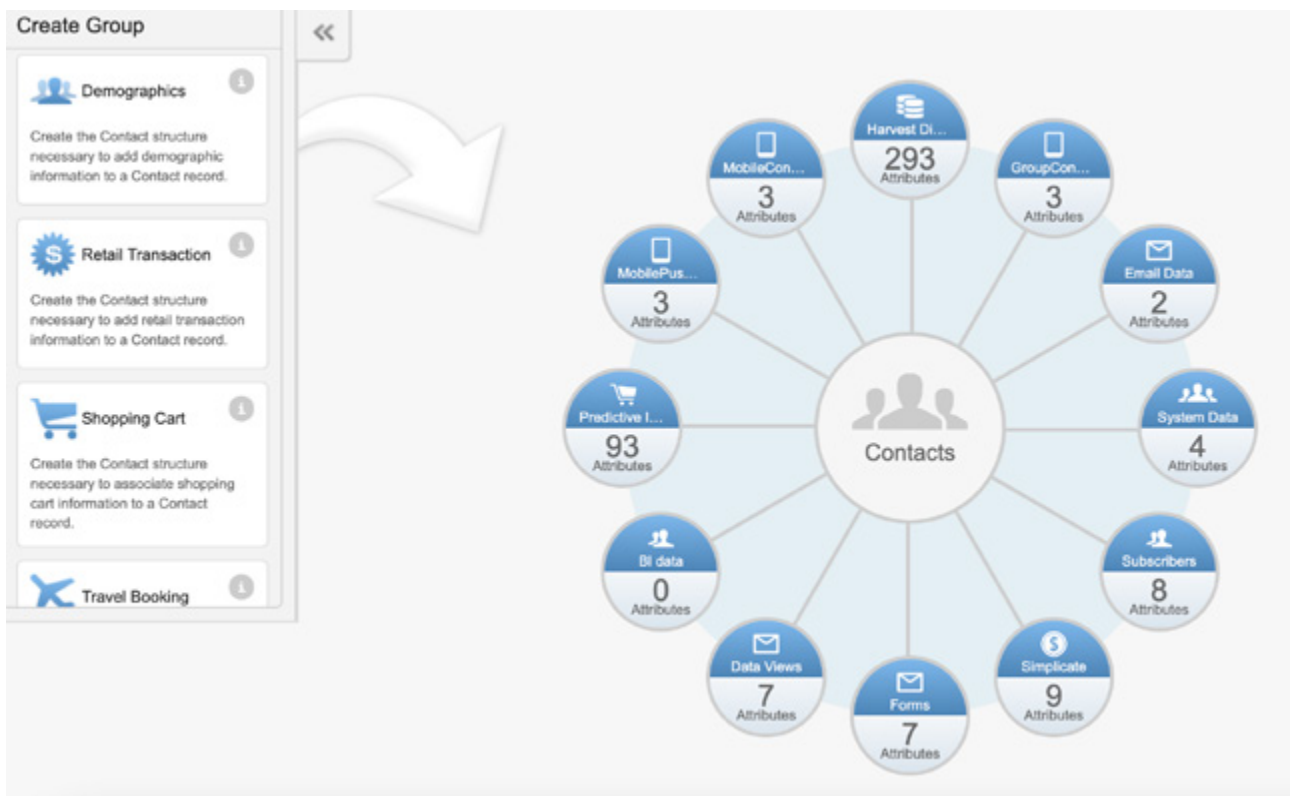


Use cases Data Designer



Use cases Data Designer

The data designer already has the Salesforce Marketing Cloud Connector data available. You can add any object and field to the mapping and it will be made available within an Attribute group within the Data Designer.



Did you know there are also templates you can use?

[View the templates →](#)

Use cases Data Designer

Did you know it's possible to create your own Attribute Groups?

Here are a couple of use cases:



Create a combined data extension for your subscribers, so you can quickly see in use relevant fields



Import external data via SFTP imports or via the MC API and make them available within an Attribute Group. For example; churn data, upsell opportunities, classifications, product affinity, etc.



Create an Attribute Group with key metrics. For example; customer lifetime value, last purchase date, total amount of orders, etc



Create demographics Attribute Groups



Create AttributeGroups that are related to your product feed

How Data Designer and Activation Studio work together



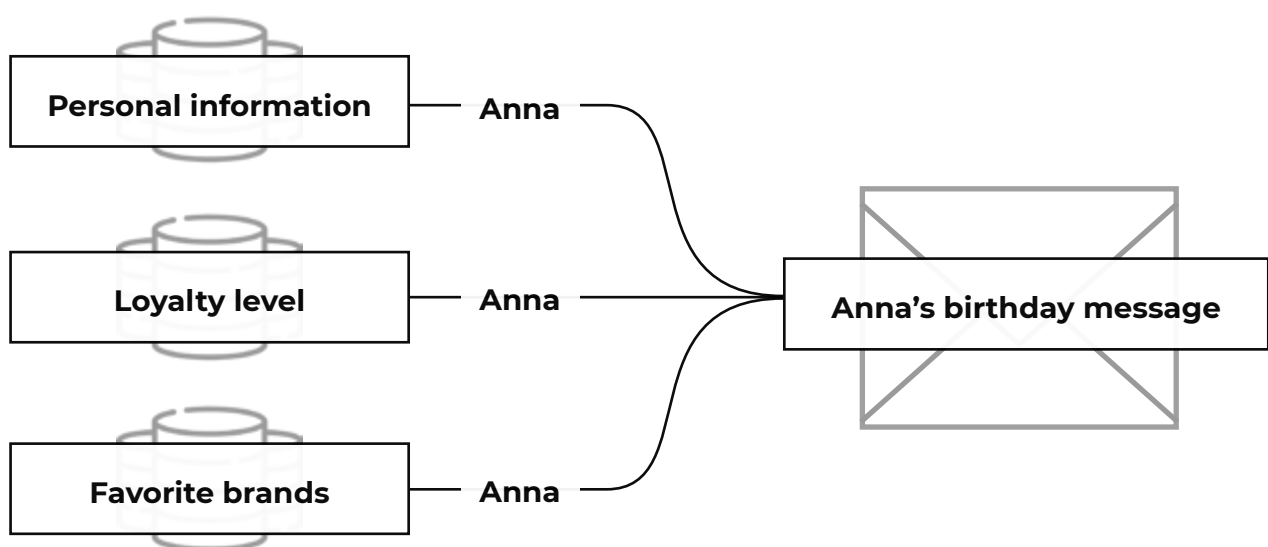
How Data Designer and Activation Studio work together

When the data is linked in the correct way via Data Designer all the correlations become visible in Activation studio. If we take another look at Anna. We would like to create a segment with all the people that are like Anna: Have bought beauty products, from Brand A - Brand B - Brand C and is a golden loyalty client. Activation studio now knows how to create the segment because all the data is mapped in Data Designer.

Now we've got the segment we can send Anna and the other

people in the segment een email showing products relevant to them. And because we value them as a costumer, we add a discount code specially for them. Do we know their birthday? Great send an email with even more discount to celebrate their birthday.

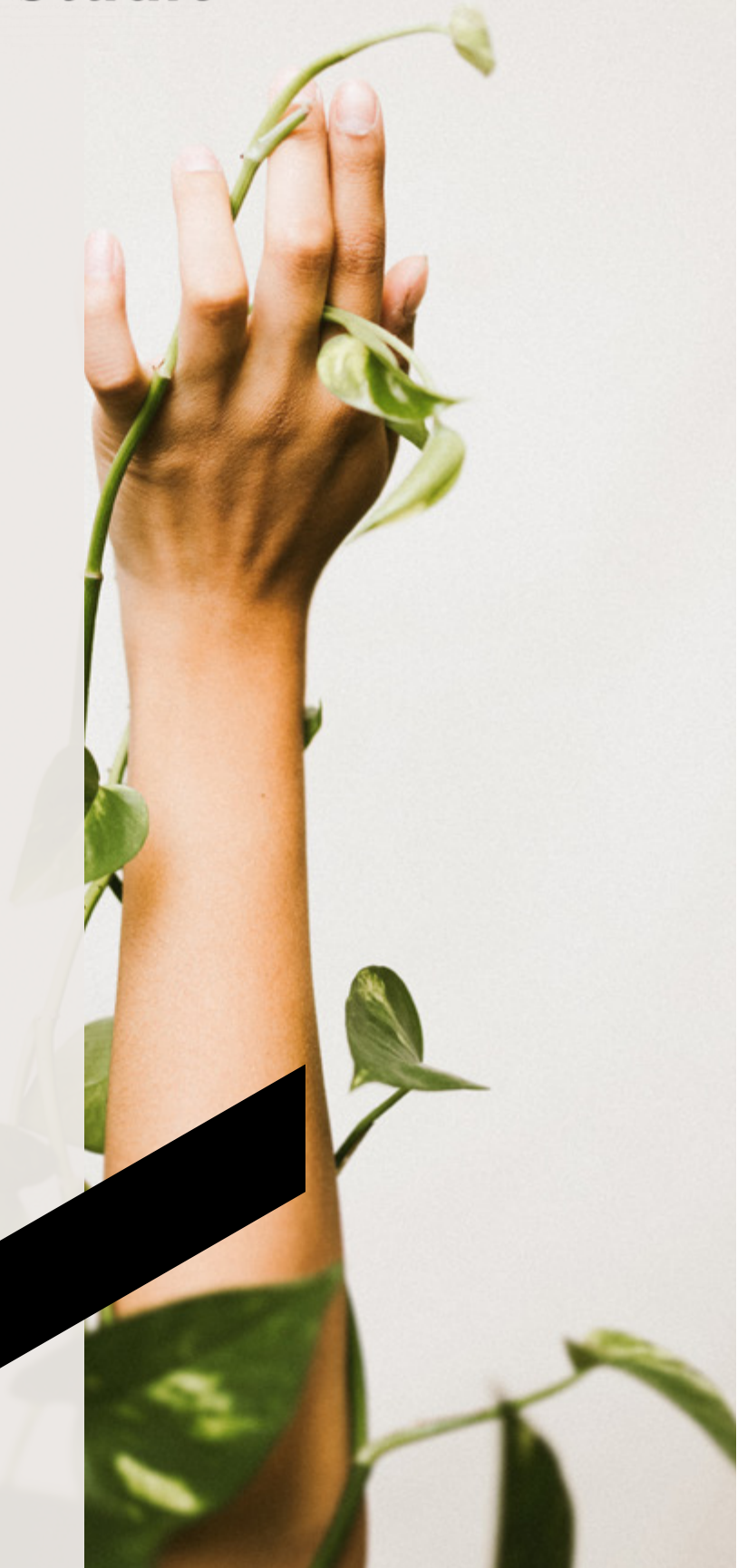
When date-of-birth is 7 days from today add them to the segment. Automate the segmentation within Automation Studio and create your journey. Your campaign is started without any SQL knowledge needed.



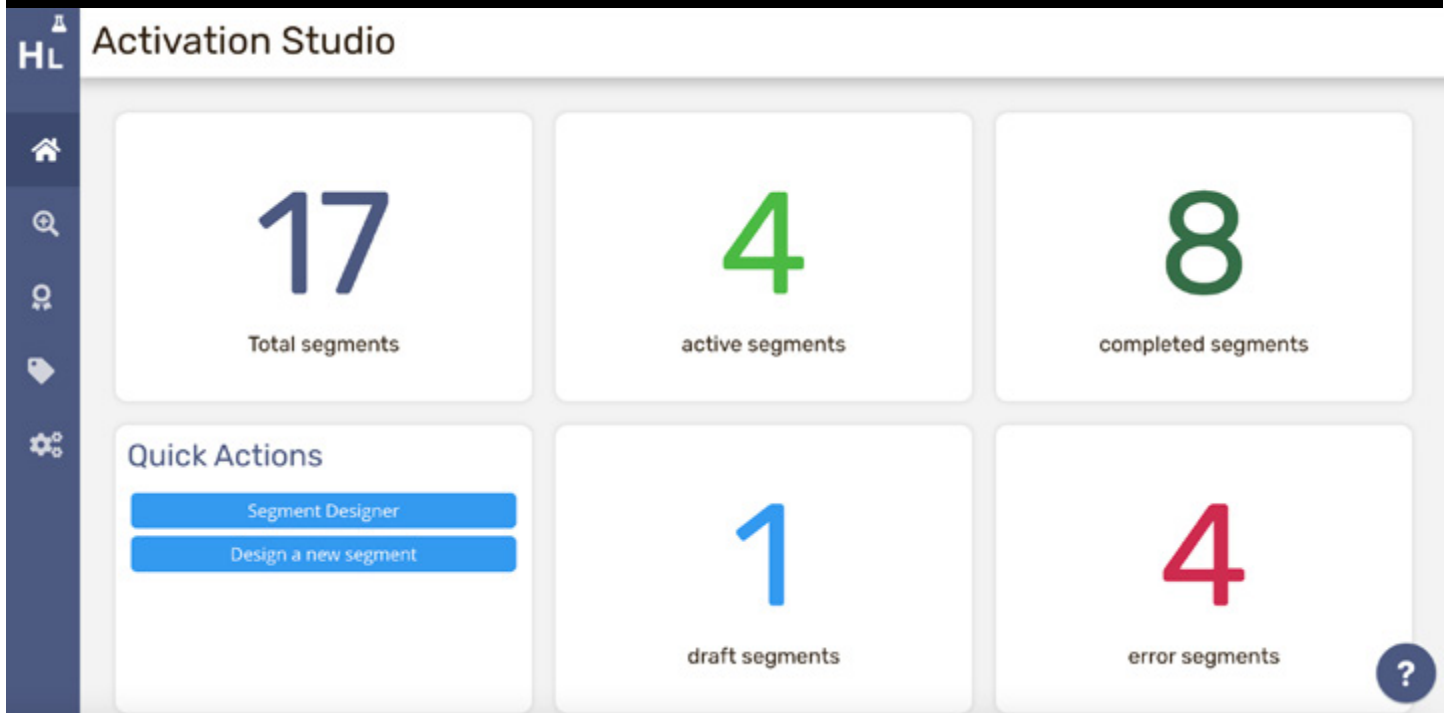


Activation Studio

What is Activation Studio



How Data Designer and Activation Studio work together



Activation Studio offers numerous quality of life improvements within Salesforce Marketing Cloud. An easy visual drag and drop segment designer that plugs into your Marketing Cloud business unit. Furthermore the possibility to include behavioral web interactions and calculate scores.

SEGMENT DESIGNER

We all know Marketing Cloud is missing an easy way to create complex segments. If you know SQL, you are golden, but most marketers struggle on this subject.

The Segment Designer offers a visual drag and drop interface to create segments for your journeys. Save them as a draft or easily automate them. Including benchmark data vs Journey data.

How Data Designer and Activation Studio work together

INTERACTION DESIGNER

Include web behavior and start creating high potential segments for your journeys. Define interaction types and start tracking video views, downloads, form abandonment, etc and start defining journeys to follow-up these interactions.

SCORE DESIGNER

Lead scoring has never been part of Marketing Cloud. The Score Designer offers a lead scoring and tagging functionality within your Marketing Cloud Org.



All interactions and scores can be combined within the Segment Designer.



What is Harvest Tech Labs

Harvest Tech Labs is a Harvest Digital company. Focused on creating solutions for customers icw Salesforce Sales, Service and/or Marketing Cloud.

Visit HarvestDigital.eu →

Extra: Tips for use of Data Designer

- Use a Single Contact Key
- Find Consistent Information to Tie Potential Duplicate Contact Records Together
- Understand the Difference Between All Subscribers and All Contacts Lists
- Understand the Contact Record Deletion Process
- Change ID Number Data Type Before Linking to Contact Key
- Link Attribute Groups and Populations Using Contact Key When Possible
- Understand the Differences Between Contact ID and Subscriber ID versus Contact Key and Subscriber Key
- Limit Populations to Three Entities

[View the full description here →](#)



Activation Studio

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