Connecting the Clouds

Utilizing Service Cloud data in Marketing Cloud

io@markus.codes May 17, 2018

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- Senior Developer @ **durchblicker**

  - price comparison platform

  - insurance, energy, finance, telco

  - > 50 people and growing

- ~ 15 years in development

- > 2,5 years experience with Service Cloud

- ~ 2 years experience with Marketing Cloud

Agenda

- What is Marketing Cloud?

- Why connect Service and Marketing Cloud?

- Marketing Cloud Connect

- Journey Builder

  - Service Cloud audience selection

  - next level journeys with custom activities
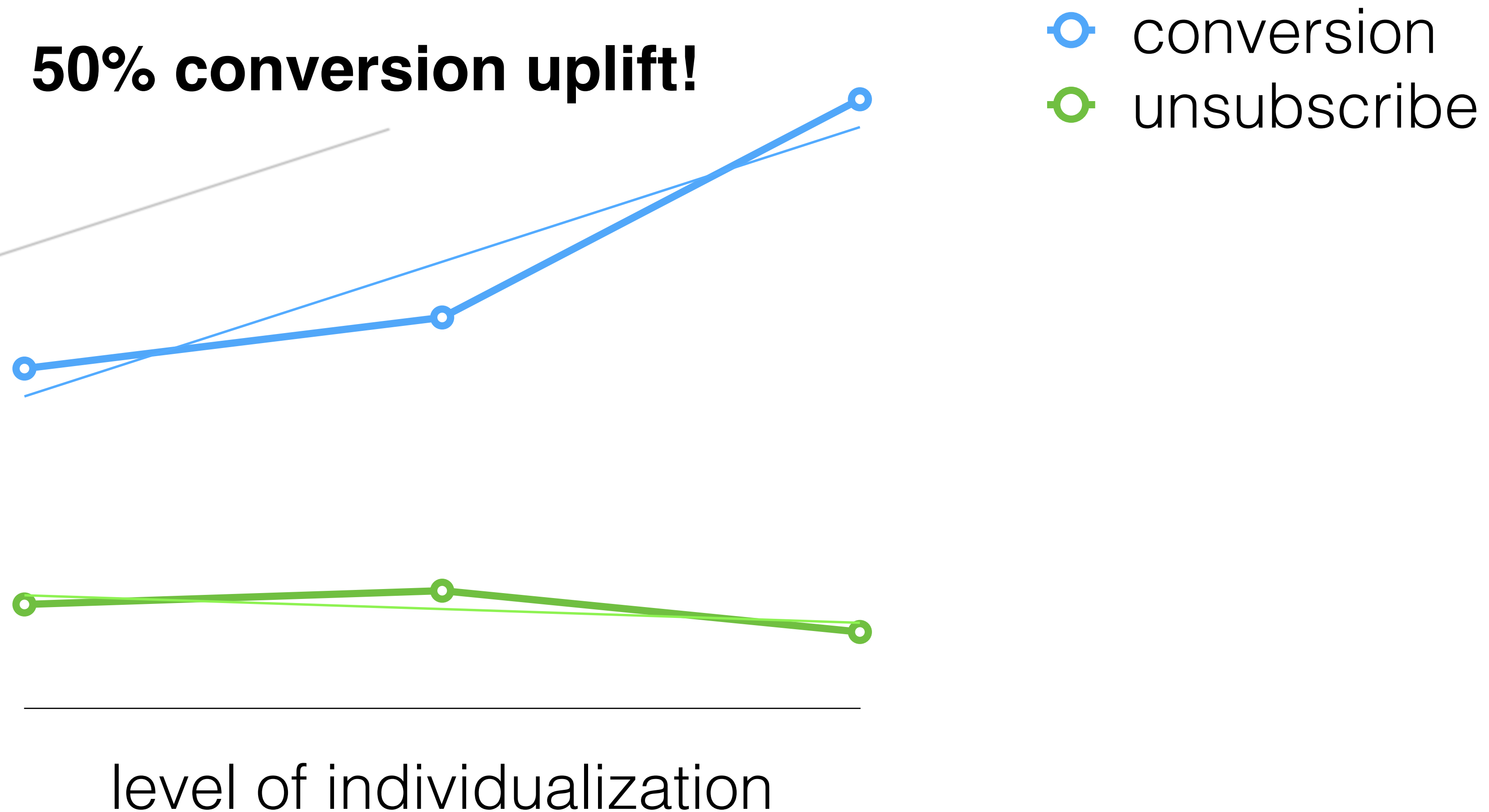
- Marketing Cloud Developer Tools

What is Marketing Cloud?

- Marketing Automation tool

  - Email, Social, Mobile, …

- Focus on B2C

- 2000: ExactTarget

- 2012: Pardot (B2B) bought by ExactTarget

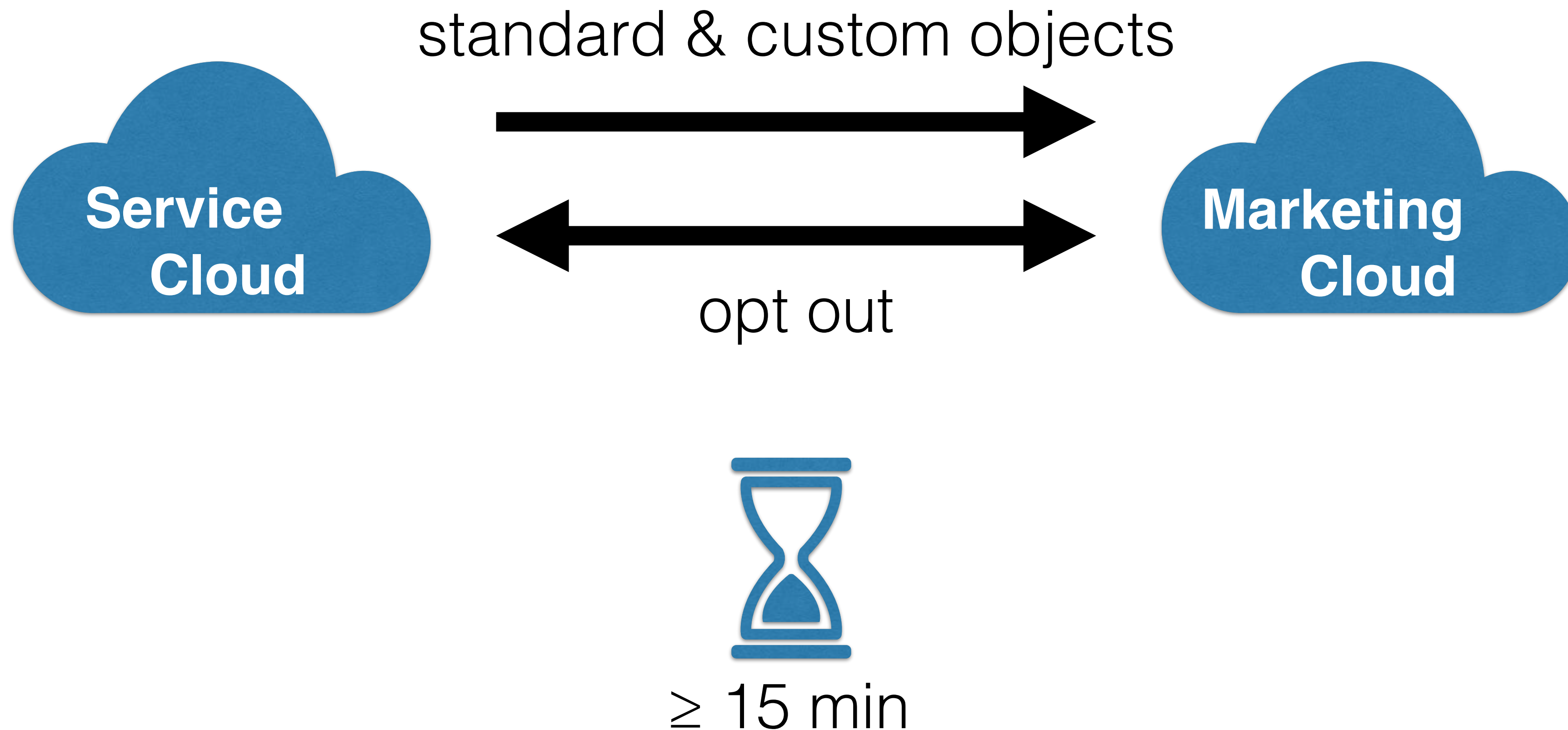- June 2013: Salesforce acquired ExactTarget

Why connect Service and Marketing Cloud?

- use data you already have

- no redundant data storage and data administration

- better segmentation & personalization

  - more relevant campaigns

  - more relevant content

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More relevant content

50% conversion uplift!

conversion
unsubscribe

level of individualization

Marketing Cloud Connect

standard & custom objects

Service Cloud

Marketing Cloud

opt out

≥ 15 min

Problems & pitfalls

- polling interval >= 15 min

- email address changes in SFDC not effective in SFMC

    - workaround required! (➡ markus.codes/email-sync-workaround)

- no blind faith in new features!
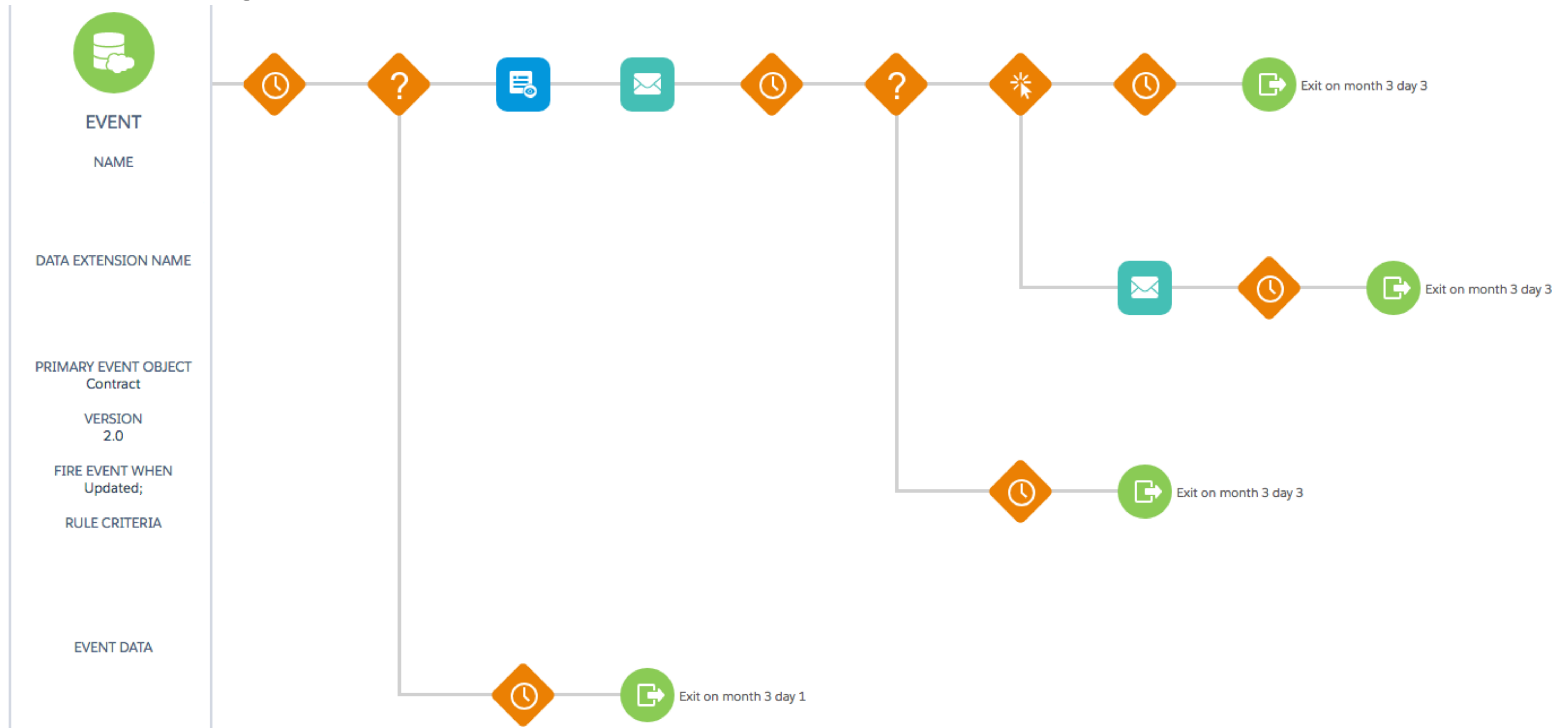
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Service Cloud audience selection

- Salesforce Data Event

- synchronized data extensions

    - + filtered data extension

    - + SQL activity (more flexibility)

- report-based

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Salesforce Data Event

- trigger journey on change in Service Cloud

- no sync gap for event data!

- possible use cases include

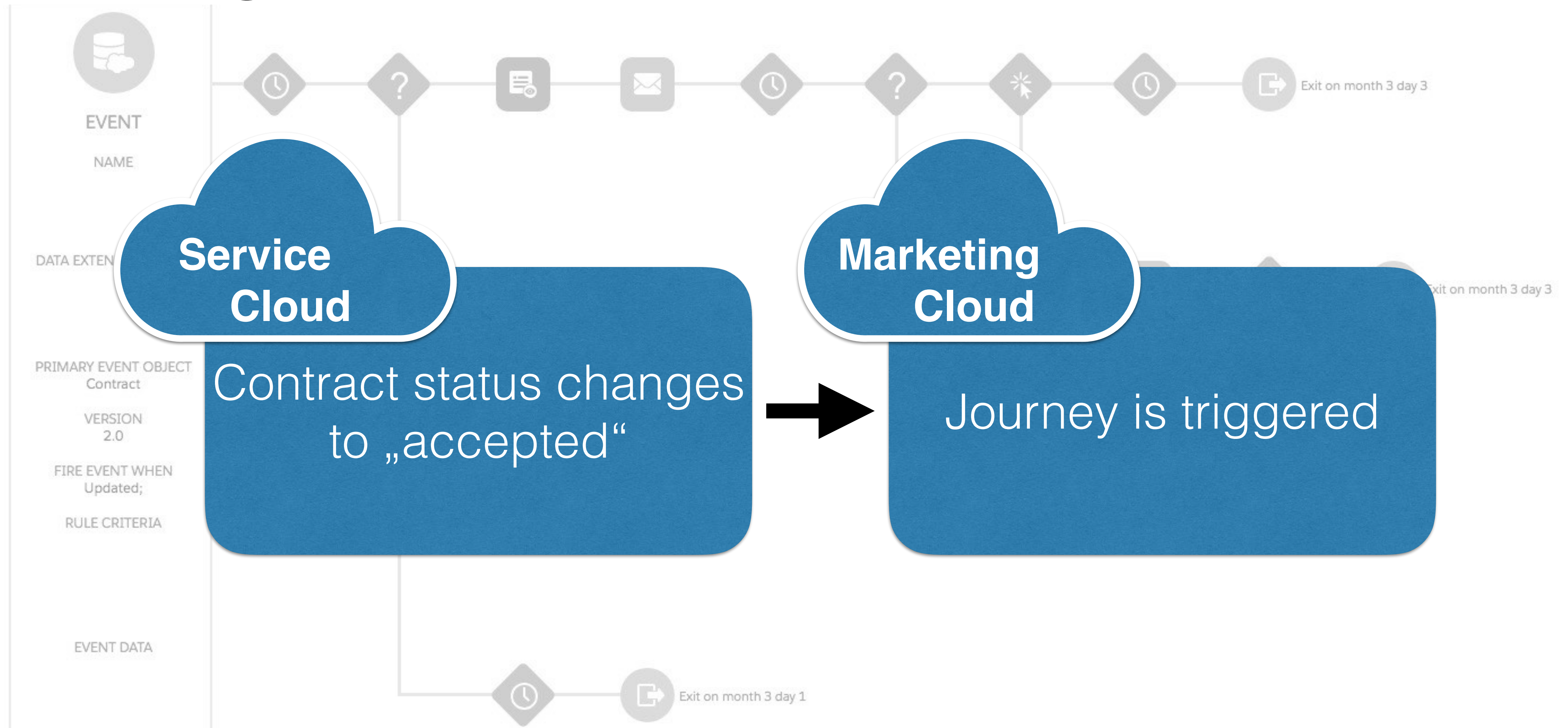 - welcome journey

  - survey after closed customer service case

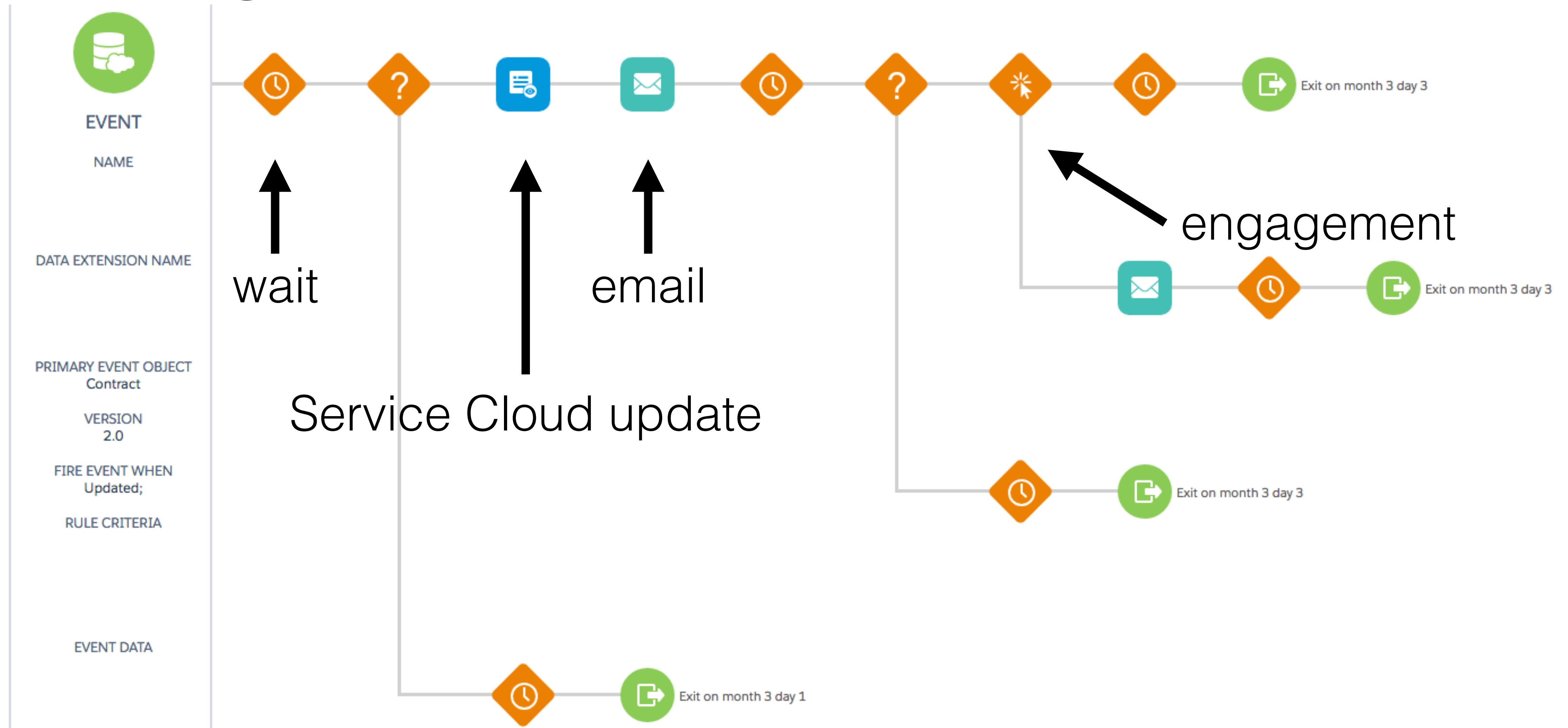# Rating request after contract is closed

Rating request after contract is closed

Rating request after contract is closed

Service Cloud

Contract status changes to „accepted"

Marketing Cloud

Journey is triggered

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Rating request after contract is closed

wait

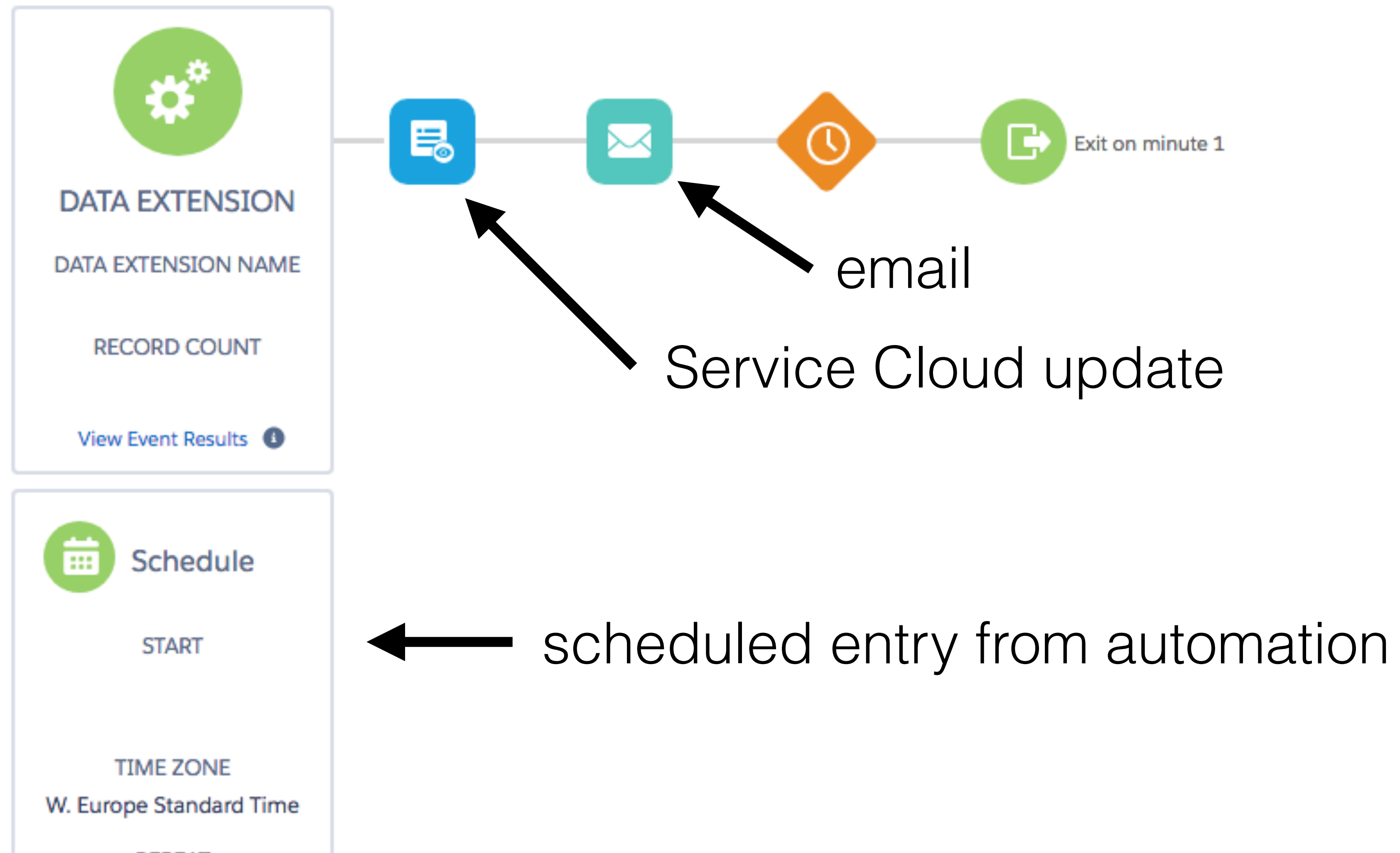Service Cloud update

email

engagement

Automation Studio triggered Journey

- audience selection via scheduled SQL activity

- result of activity injected to journey

- possible use cases

  - scheduled reminders

  - specific info only relevant if some conditions are met

Improvement suggestion for active contract

Improvement suggestion for active contract

email

Service Cloud update

scheduled entry from automation
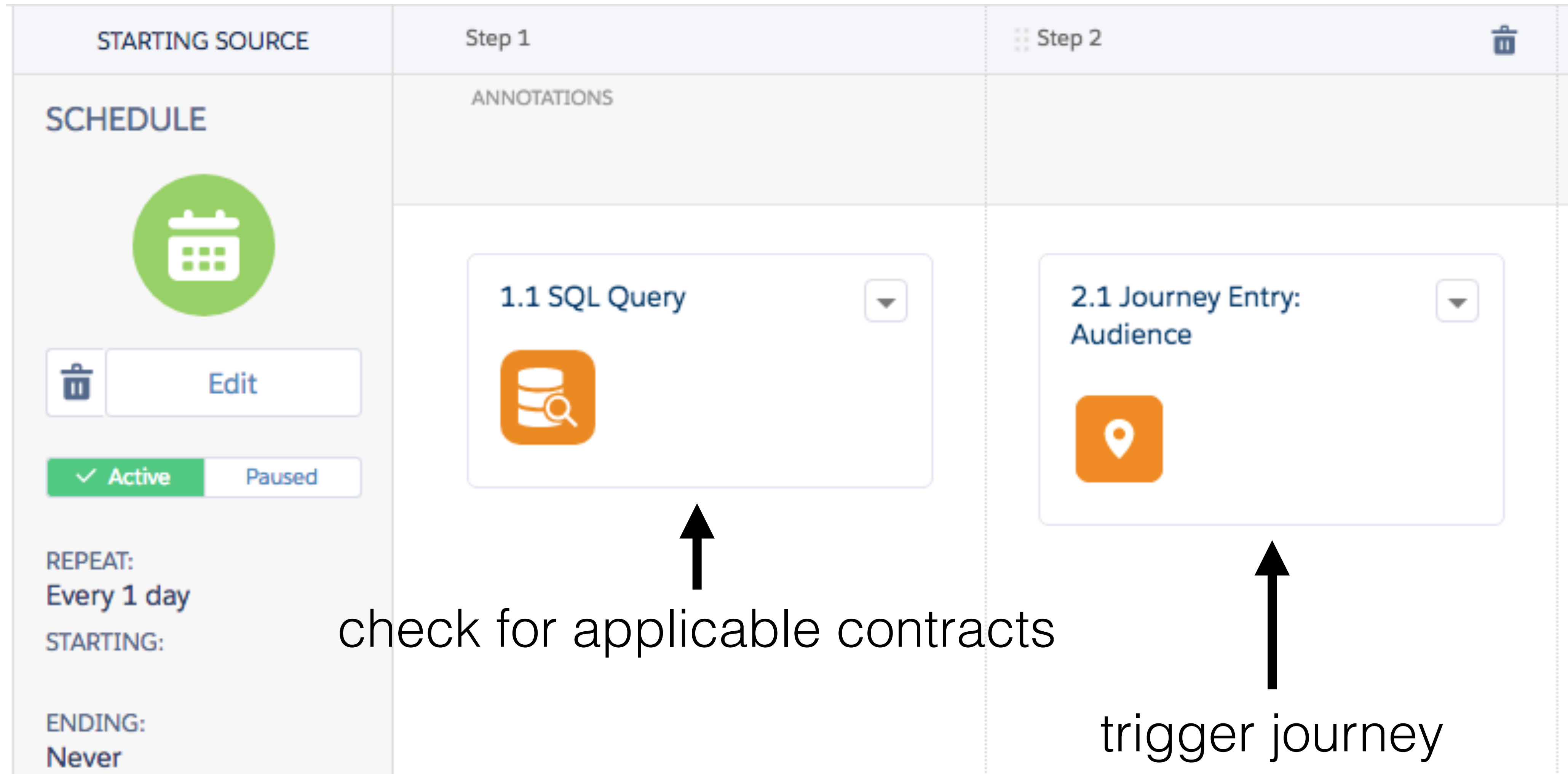
Build next level journeys with custom activities

- more complex actions possible

- use external services (APIs)

- downsides

  - self-hosted

  - limited error handling & logging

  - limited documentation

- ➞ github.com/mslabina/sfmc-servicecloud-customsplit

∨ Flow Control

Decision Split   Random Split   Engagement Split

Join   Wait   Custom

Custom activity components
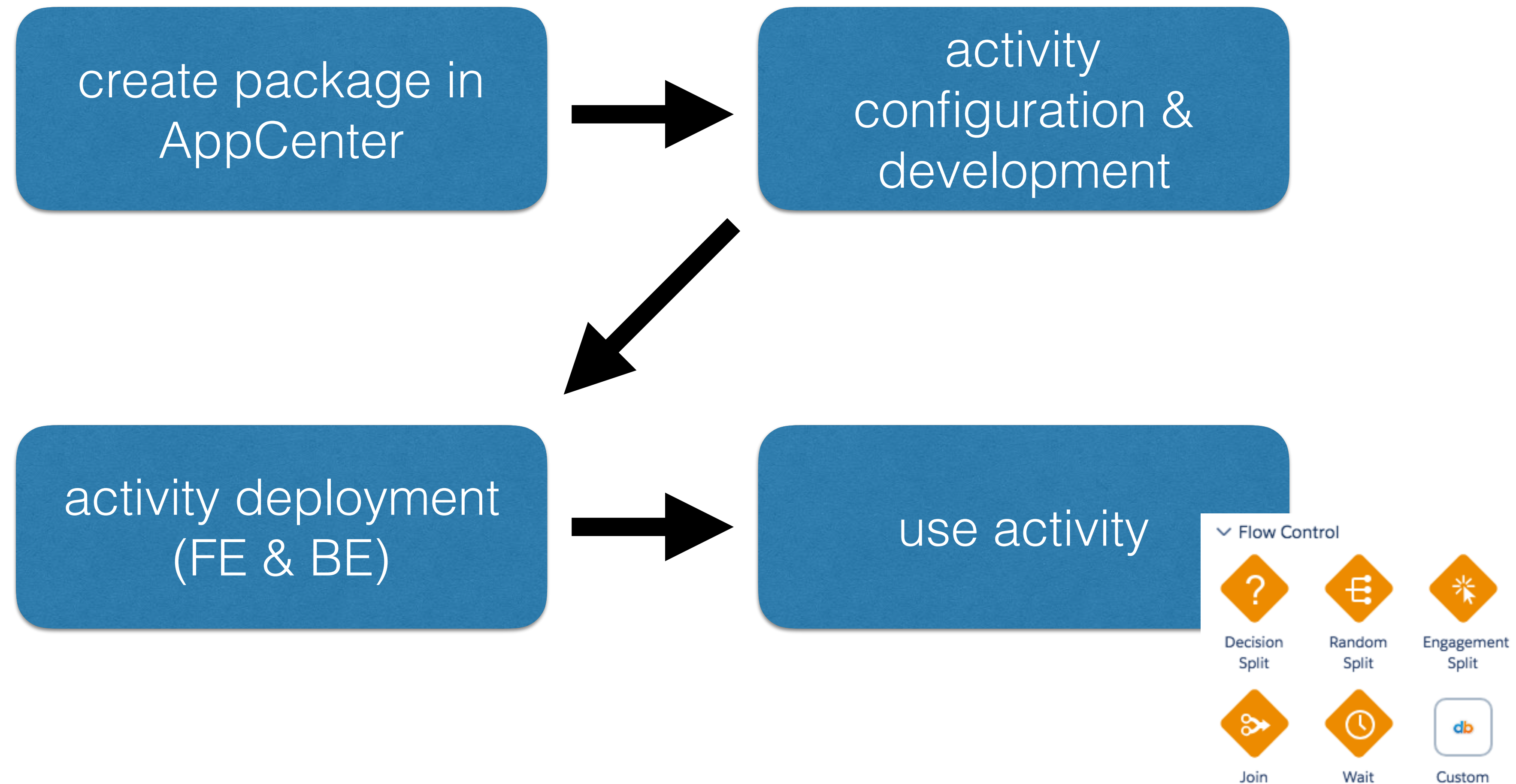
activity backend routes

save

publish

validate

execute

configuration dialog (FE)

configuration file (JSON)

AppCenter package

Custom activity development

create package in AppCenter ➡️ activity configuration & development

⬇️

activity deployment (FE & BE) ➡️ use activity

Salesforce Marketing Cloud Developer Tools

- free Google Chrome extension

- exposes hidden data

  - detailed error messages

  - publication list ids

  - journey details

  - data extension details

- recommended by MVPs

- markus.codes/sfmc-chrome-devtools
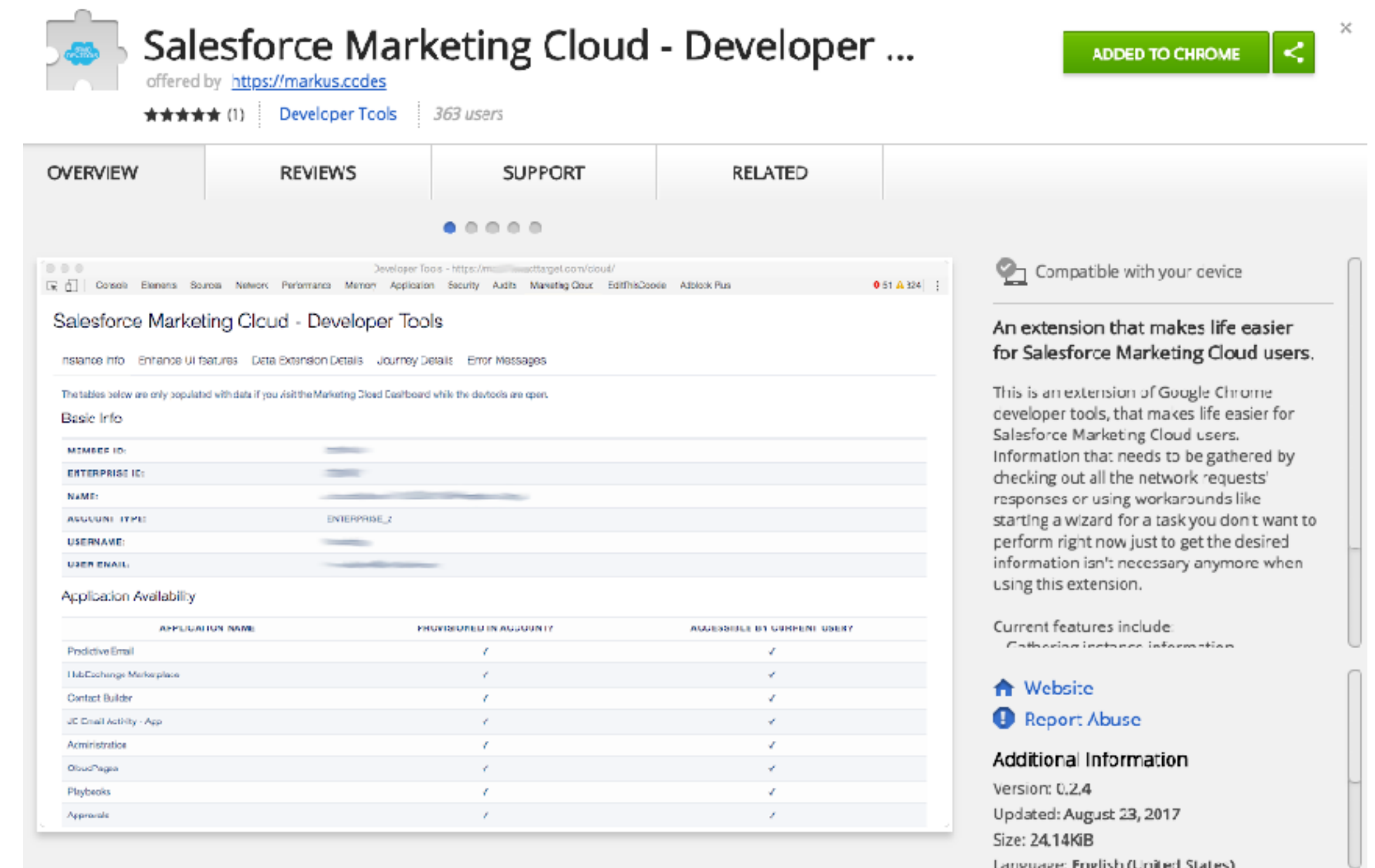
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