Marketing Cloud and Salesforce

Implementation Recommendations from Salesforce Architects

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Overview

Salesforce Marketing Cloud is a powerful tool that enables organizations to know, value, and assist their constituents, ultimately increasing loyalty and driving shared outcomes.

Marketing Cloud is flexible enough to be used independent of other components that constitute the Salesforce Platform. However, the decisions around whether to use Marketing Cloud in conjunction with the Salesforce Platform and the order in which the systems are implemented will have lasting impact on technical development and bottom lines.

Regardless of where your organization is in the Salesforce Marketing Cloud journey, this whitepaper outlines specific recommendations and best practices to help you build (or re-build) on a solid foundation.

Benefits of a Connected Marketing Cloud

While Marketing Cloud helps organizations communicate and connect with their constituents, the Salesforce CRM Platform (which, in this context, includes Sales Cloud and/or Service Cloud with other possible components) serves to maintain a single view of the customer–including all demographics, account attributes, and a history of all touchpoints with the organization.

In order to truly deliver a personalized experience for constituents using Marketing Cloud, each interaction must take into account the previous interactions and any other information about that individual.

For example, when a user submits a form they can be entered into a series of emails designed to help them accomplish their intended outcome or learn about related offerings. If that same user already has a long history with the organization, messages may be different than if this is their very first interaction. Without a single source of truth for customer information, it becomes very challenging to deliver the right message to the right person at the right time.

On the other side of the equation is the need to update the customer profile when a user engages with a particular marketing campaign (or doesn't engage). For example, a customer might express their interest in participating in a promotional event by clicking on a button in an email sent via Marketing Cloud. When the user takes that action, it requires a reaction–either to notify someone, automatically update their RSVP status, or send them a follow-up email. Other examples include customer service follow-up after a negative survey response or updates to marketing communication preferences and subscriptions.

When all activities from Marketing Cloud are combined with activities from other areas of your organization, it becomes possible to produce meaningful reports and insights. For example, an organization might be interested in knowing how a customer's interaction with its regular monthly newsletter changes after a poor experience with a service representative. The correlation between timely resolution of the issue, marketing engagement, and future giving is a critical measure that will help the organization understand how the customer responds to their products and services over time. In order to identify gaps in marketing spend and capitalize on the most successful programs, it is crucial for organizations to be able to connect the dots between customer demographics and interaction history in association with marketing engagement.

A connected Marketing Cloud makes this possible.
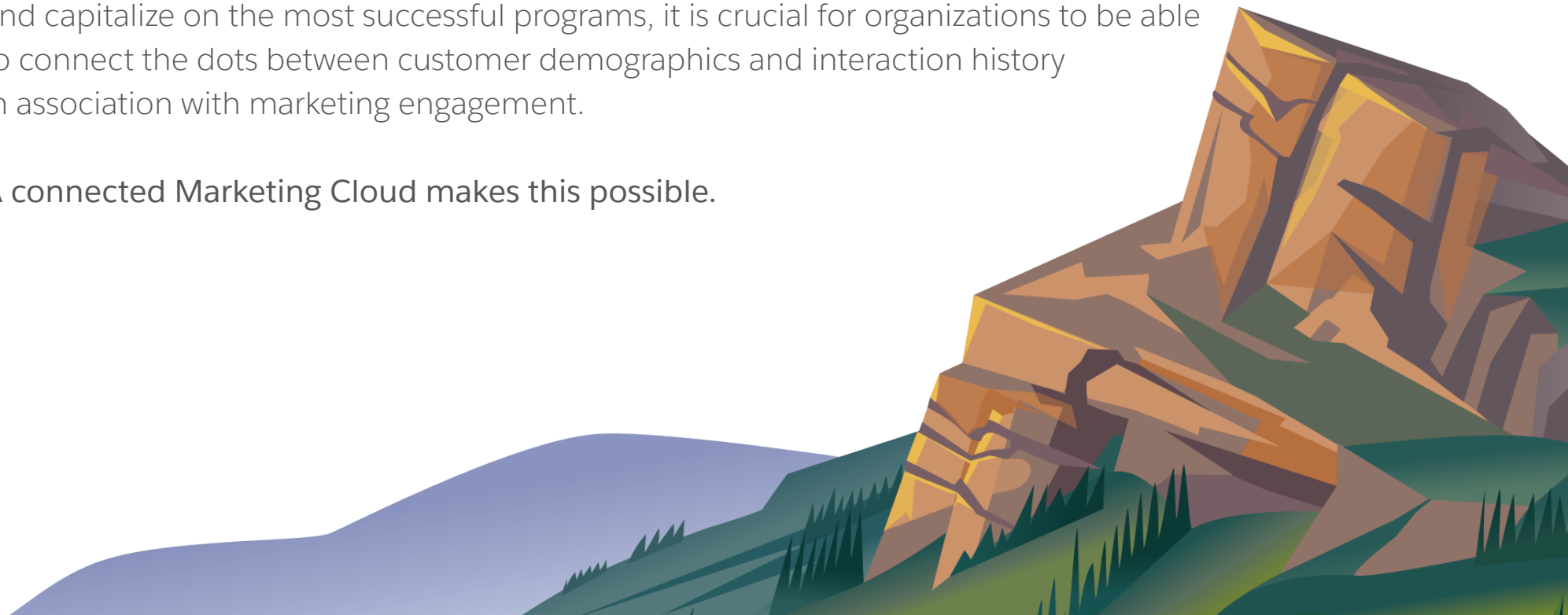
On each side of the equation–leveraging data from a single source or updating that source–it is critical for Marketing Cloud to be synchronized and intimately connected with a single source of customer information.

Review: The Benefits of a Connected Marketing Cloud

Integrated Constituent Lifecycle

Any business update in a CRM should be able to trigger an email interaction or a series of emails. Similarly, a meaningful interaction with marketing or communications should be able to trigger a corresponding CRM update.

Integrated Reporting

When all CRM and Marketing Cloud activities are combined and available in one spot, it is possible to have meaningful reports that aggregate interactions.

Understanding Marketing Cloud Connect

Marketing Cloud Connect to the Rescue!

Seeing all the benefits that could come from a connected Marketing Cloud, Salesforce offers an out-of-the-box solution to seamlessly unify Marketing Cloud with Salesforce CRM. Available as an AppExchange package, Marketing Cloud Connect (MCC) consists of a long and growing list of features that immediately increases the business value made possible by Marketing Cloud.

The following list is not comprehensive, but suggestive of the main features included:

- Leverage real-time data for message personalization, audience segmentation, and journey orchestration.

- Seamlessly synchronize handpicked data points from Salesforce to Marketing Cloud (unidirectional sync) with refresh cycles as often as 15 minutes. It's important to note that this data synchronization does not count against API limits.

- Easily define audiences in Marketing Cloud by leveraging Salesforce Reports and Campaigns. Using this feature, CRM users are able to create new audience segments by reusing existing reports or creating new Salesforce Reports/Campaigns.

- Enable Marketing Cloud Emails to be sent from within the Salesforce CRM by individual users with the ability to personalize sender information and conduct A/B tests. Email templates created in Marketing Cloud are made available to CRM users without needing to login to a separate system.

- Initiate Marketing Cloud single email sends and journeys in real-time based on updates at the CRM level

- Log marketing engagement history on the Salesforce CRM Contact/Lead record and associated Campaign records so that all users can see which campaigns have been distributed, how an individual user has responded, and how each campaign has performed at a macro-level. This can be turned on/off for specific email sends, and can even include an image of the email that was distributed.

The Marketing Cloud Connect package is continuously updated with new features and is fully supported by Salesforce. Setup, training materials and Trailhead tutorials are available to help get your team up and running in no time.

Regardless of where you are in your Marketing Cloud journey, if you have any desire to integrate your constituent lifecycle or get a connected view of marketing ROI, Marketing Cloud Connect and its counterpart–Salesforce CRM platform–are highly recommended. And if you have decided that this is your path, take heed of the following.
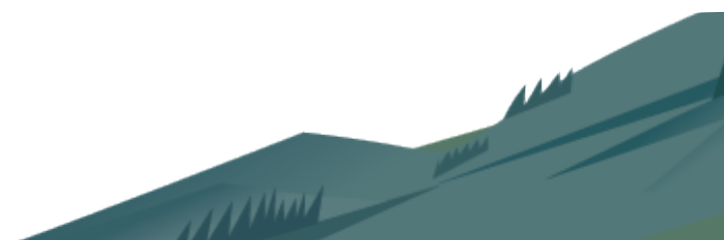
One Vital Prerequisite

Prerequisite: One Key to Rule Them All!

In order for disparate systems to exchange data seamlessly and create a unified customer profile, each customer must be assigned a single unique identifier (ID).

The way Salesforce CRM and Marketing Cloud address this is by using the Salesforce Record ID (Lead ID/Contact ID/Account ID) as that single unique identifier of the customer.

In the Marketing Cloud, this is referred to as the Contact Key.
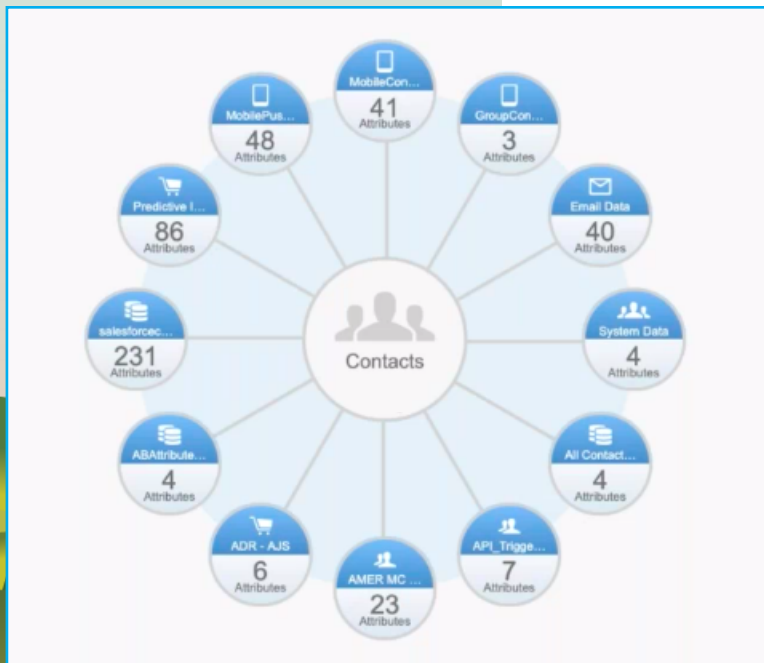
Dig Deeper

Marketing Cloud identifies subscribers/contacts with a single 'Contact ID'. This ID serves to unite multiple unique identifiers like Email Addresses, Phone Numbers, Device IDs, or External System IDs.

If Jane Doe has multiple email addresses or two cell phones registered in a database, Marketing Cloud enables SFMC to analyze all information about Jane across all devices in order to distribute the right message to the right device at the right time.

This is all made possible by designing the system around one KEY.

This, of course, introduces one significant challenge: **all constituents that need to be included in communications distributed from the Marketing Cloud need to be provisioned in Salesforce CRM first.** In other words, each Marketing Cloud subscriber must already exist in Salesforce CRM in order to have the Contact/Lead ID that is required for data to be passed between each system.

While this may sound premature if you are at the beginning of your Marketing Cloud journey (particularly if your initiative is driven by marketing needs rather than CRM needs), creating contacts in Salesforce CRM prior to the Marketing Cloud will have a lasting impact on technical development and bottom lines.

When installing Marketing Cloud Connect to synchronize data between Marketing Cloud and Salesforce, each Lead and Contact record that is synchronized from Salesforce will automatically be created in the Marketing Cloud with a KEY that matches their Salesforce Record ID.

If using an alternative approach to load data to the Marketing Cloud from a system that is not part of the Salesforce platform (i.e. manual list import, automatic file upload from external application), Marketing Cloud will generate and assign a KEY to each contact that is different than the Salesforce CRM ID. For instance, when uploading a list of email addresses to Marketing Cloud directly, the KEY would be set to their email address. In a scenario where a matching email address exists in Salesforce CRM, there would then be two separate records in Marketing Cloud—one with email address as KEY and one with ContactID as KEY.
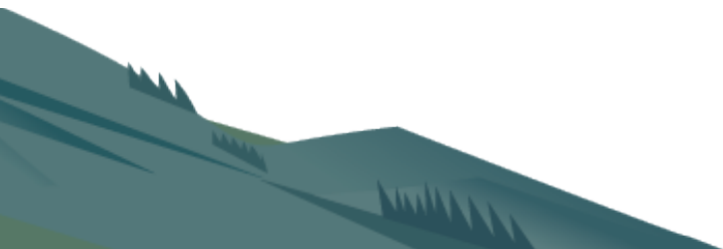
This is where the problem starts to come in: if Marketing Cloud doesn't identify a record as a duplicate based on a matching Contact Key, it will create a new contact record, resulting in multiple records in the Marketing Cloud database for the same contact–each with its own contact information, send history, and opt in/opt out preferences.

Here's what could happen next:

- Contacts may start receiving duplicate communications.

- Contacts who had previously opted out from receiving communications may start to receive them again (which could be a violation of CAN-SPAM, GDPR, and CASL).

- Updates to a record in Salesforce will not be connected to the unlinked contacts in Marketing Cloud, which makes it even harder to identify duplicate records over time and more difficult to personalize with real-time data.

- If you want to access a contact's preferences or send history to determine whether or not they belong in a certain journey, the results may not be accurate since the contact record that's linked with Salesforce CRM will have a different send history than the one that is not.

Customer experience translates to much more than simply sending marketing emails and hoping for engagement. Unless user interactions across different channels are studied over time and carefully utilized in connection with one another, it is difficult to expect meaningful outcomes, and even more difficult to measure those outcomes. The marketing journey is one component of a comprehensive and integrated customer journey strategy that spans the entire organization and its products and services.

The Most Important Sentence You Will Read Today

In order to deliver a connected constituent experience and reap the out-of-the-box benefits of Marketing Cloud, the Marketing Cloud CONTACT KEY must be the same as the Contact/Lead/ PersonAccount ID in Salesforce CRM.

Marketing Cloud Contact KEY = Contact/Lead/PersonAccount ID in Salesforce CRM

Strategies for Common Implementation Scenarios

How to Get To Your Ideal Future State

Having recognized the importance of a connected Marketing Cloud and the technical prerequisites to reap the benefits of Salesforce's out-of-the-box AppExchange package, Marketing Cloud Connect, let us now look at some common current-state scenarios and ideal resolutions.

1 — ABC University: Salesforce First, Marketing Cloud Second
Recommended Best Practice

Current state:

ABC University has implemented Sales Cloud or Service Cloud first, then implemented Marketing Cloud and Marketing Cloud Connect to synchronize its leads and contacts. All of their contacts come from Salesforce, including brand new contacts that have been manually added from a list import. The Marketing team is able to create audiences within Marketing Cloud with near real-time CRM data and send updates back to CRM to track interactions, notify the right people, and produce meaningful reports.

What to do next:

Go kick back and get some well deserved rest. Your tools are set up correctly and everything should be good to go for now and for the long-term.

② Learnville College: Marketing Cloud First, Salesforce CRM Later

Current state:

Learnville College knows that they will eventually use Salesforce CRM but have decided to start with Marketing Cloud and populate it with contact records stored in spreadsheets and flat files. There are a number of reasons why they chose to do this–mainly, their executive leadership team wants to see a return on their investment in Marketing Cloud as quickly as possible. Regardless of why they chose this path, there are tangible next steps to take in order to reduce the amount of rework that will be needed when Salesforce CRM is eventually implemented.

What to do next:

- Stand up your Salesforce CRM instance at the beginning of your implementation. Even though you may not be planning on using it right away, this approach will ensure that you have the correct foundation already in place when you are ready to start using it.
- Configure your Contact object in Salesforce CRM to contain the bare minimum number of fields needed to properly synchronize your contact records with Marketing Cloud (i.e. Email Address).
- Use Data Loader to load the data from your flat files (or master database) into Salesforce CRM and implement a process to begin doing this on an ongoing basis instead of importing directly into Marketing Cloud. Once the records are loaded, they'll replicate into Marketing Cloud with the correct KEY assigned by default.
- If necessary, export email engagement history from the Marketing Cloud (i.e. emails sent/opened/clicked), and import into Salesforce CRM on the correct Contact record.
- At this point, take stock of your current campaigns and automations. If necessary, document a plan to rebuild automations or SQL queries that draw from the newly created synchronized data extensions rather than the old flat file data model.
- Install the Marketing Cloud Connect package to synchronize data between the two applications.
- Continue to build out the rest of your CRM functionality in Salesforce without having to worry about whether or not it will affect your Marketing Cloud data since the sync will already be in place.

③ Galaxy University: Marketing Cloud and Salesforce CRM are already stood up separately
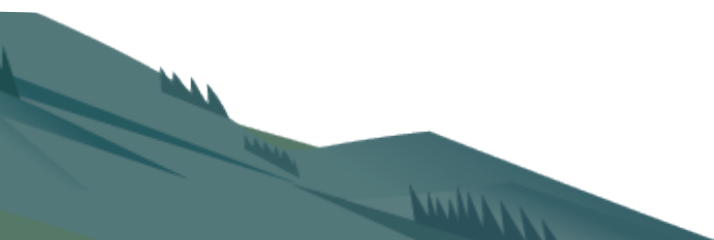
Current state:

Galaxy University is already using Marketing Cloud and Salesforce, but they have been loading lists directly into Marketing Cloud and they do not utilize Marketing Cloud Connect. As a result, Some of their contacts exist in both systems but data is not automatically synchronized. Now, Galaxy University is hoping to build integrated customer journeys–the marketing team would like to leverage real-time data from CRM and CRM users would like to see how their contacts are engaging with marketing campaigns.

What to do next:

There are three options here and your final decision about which one to go with will ultimately depend on a number of different factors, such as how much of a cost you're willing to incur, whether or not you're willing to lose some of your engagement history, and how much effort you're willing to put into re-architecting your current setup.

These options are outlined in tables on the next few pages, along with their pros and cons.

If you're still not sure how to proceed, you may want to reach out to the Trailblazer community or think about engaging one of our Advisory Services Team members to provide some additional insights and assistance.

3 OPTIONS FOR GALAXY UNIVERSITY

	1. Extract and Delete	2. Subscriber Key Migration	3. Leave As-Is
ACTIONS	Extract all of your existing Marketing Cloud contacts and their subscription preferences into a flat file. You can also leverage data views to extract some data points about their engagement history. Import the file into Salesforce CRM. Merge any duplicate contact records. Delete all of your marketing cloud contacts. Configure Marketing Cloud Connect to allow your contact data to flow back into Marketing Cloud.	Engage the Salesforce Marketing Cloud Services team to merge all of your existing Subscriber records with the new Subscriber records that have Salesforce Contact/Lead ID as the KEY.	Configure Marketing Cloud Connect and allow duplicate contacts to get created in Marketing Cloud. Use queries to link contact and subscriber records using a Data Extension.

	1. Extract and Delete	2. Subscriber Key Migration	3. Leave As-Is
PROS	This approach will bring you to the recommended architecture and unify all of your contacts going forward.	This approach will bring you to the recommended architecture and unify all of your contacts going forward and also allows you to retain your engagement history.	This approach requires the least amount of upfront effort since no data has to be migrated or reloaded.
CONS	You may lose your existing engagement history from Marketing Cloud, unless you download tracking data from Marketing Cloud and upload to CRM suitably.	This is a paid service engagement, and can take several weeks to complete.	This approach utilizes more contact records, which will incur additional costs.

You also need to write your own queries to join the records together. |
| LEVEL OF EFFORT | Easy to medium. | N/A–Salesforce Services handles the work for you. | Medium to high. |
| COST | No cost. | Yes. Contact your Account Executive. | No cost. |

4 Rising Trailblazers Nonprofit:
Marketing Cloud and No CRM at all

Current state:
Rising Trailblazers wants to implement Marketing Cloud and has no plans to use a CRM. At this point, they have no need for marketing subscribers to be used for any other purpose.

What to do next:
While Rising Trailblazers can continue on this path with no technical issues, they will be missing out on the significant benefits that CRM brings to the marketing communications toolkit.

One option Rising Trailblazers could consider is leveraging the complementary Salesforce.org Power of Ten Licenses to load data into Salesforce first, and then let it replicate into Marketing Cloud by following the same steps in Scenario 2. If they do change their minds about standing up Salesforce CRM in the future, they won't have to conduct rework or worry about things like duplicate contact records and lost send histories.
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5 Dream Big Nonprofit:
Marketing Cloud and a Non-Salesforce CRM

Current state:
Dream Big is using Marketing Cloud with a legacy, non-Salesforce, CRM application.

What to do next:
We recommend that Marketing Cloud be used with Salesforce for the greatest impact, mostly because of the features included with Marketing Cloud Connect. Each CRM system is unique and has its own set of features and integration options. Trying to set up end-to-end functionality between Marketing Cloud and a third party CRM application may or may not be possible compared to what you can do when used in conjunction with Salesforce CRM. If Dream Big plans to combine their CRM and Marketing Cloud data or build automated processes that involve both applications, they should work with their vendor or an implementation partner to determine what's possible. Most likely, a heavy lift with custom solutions.

Conclusion

Regardless of the size of your organization or where you are in your Marketing Cloud journey, Salesforce is committed to helping ensure the success of all of our customers.

We have a vast ecosystem of certified partners who specialize in Marketing Cloud implementations and integrations for nonprofit and education customers along with an Advisory Services Team that can provide additional recommendations around best practices.

Your Account Executive can help you identify which Salesforce and partner resources are the right fit for your organization's unique needs, so make sure to reach out to them for additional information and assistance with your selection process.

Additional Resources

- Getting Started: Marketing Cloud Connect
- Take the Trail: Use Marketing Cloud Connect to Integrate with Salesforce CRM

About the Authors

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Gokul Seshadri is a Senior Principal Customer Success Architect at Salesforce.org based in the US. He helps Higher Ed and Nonprofit customers to succeed in their multi channel marketing, digital transformation and customer 360 initiatives using Salesforce and other related technologies.

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Brad Shapiro (Principal Marketing Cloud Advisor) is a trusted digital marketing and communications advisor to the world's leading Salesforce.org nonprofit and higher education organizations. With an extensive background in business strategy, digital transformation, and deep technical expertise, Brad can quickly enable organizations with the tools and strategies needed to engage audiences in an increasingly competitive marketplace.

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Thank you.

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