20 Ideas in 20 Min

To Make Your SFMC Admin Life Easier

Jamie Holzhuter-Currie
Marketing Cloud Architect | Cloud for Good
jamie@cloud4good.com

Tatiana Romanko
Sr. Marketing Cloud Consultant | Cloud for Good
tatiana@cloud4good.com

Forward looking statements

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Thank You

Cloud for Good at a Glance

3000+
Salesforce engagements completed

4.9
AppExchange Rating
★★★★★

Developed proprietary **EDUCATION and NONPROFIT ACCELERATORS** including:

RECRUITING & ADMISSIONS

DATA MIGRATIONS

DIGITAL MARKETING

HUMAN SERVICES

Proud to have a

CERTIFIED
Technical Architect

Leading our technology practice

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NONPROFIT CLOUD
Design Partner

salesforce
EDUCATION CLOUD
Design Partner

PLEDGE 1%

Certified B Corporation

Great Place To Work®

96% Staff Retention Rate

100% Onshore Team

Largest team dedicated to the Impact Sector Space

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Who is this for?

20 Ideas in 20 Minutes

To Make Your SFMC Admin Life Easier

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Categories

High Value Reporting: Go beyond opens and clicks

Maximize Your Time: Tips to have more impact with your (limited) time

Learn! Learn! Learn! We'll point you in the right direction(s) to continue your learning journey

Manage Your Data: How to to start de-mystifying your data by setting up automated processes

Difficulty

Easy: Quick Wins! Even beginners should be able to accomplish

Medium: Approach with cautious optimism and a learner mindset

Challenging: Plan to spend more time (upskilling or configuring) for these ideas

High Value Reporting

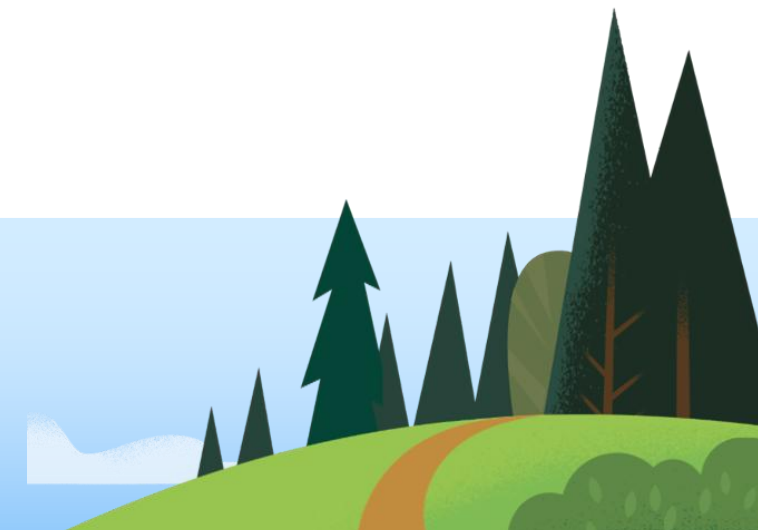# #1 Intelligence Reports Pivot Tables

Easy to Set Up (and Chronically Under-Used)

- Schedule weekly and monthly reports to get data out and in front of users
- Create a daily report on Journey sends to quickly identify if your entry source has changed unexpectedly
- Report by domains to quickly spot deliverability issues

Difficulty: Easy
Goal: High Value Reporting

#1 Intelligence Reports Pivot Tables

Easy to Set Up (and Chronically Under-Used)

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Email Domain	Email Sends ↓	Email Bounce ...	Email Open Rate	Email Click To ...	Email Unsubsc...
gmail.com	134,510	0.20 %	52.62 %	2.17 %	0.43 %
yahoo.com	17,527	0.11 %	44.76 %	1.90 %	0.27 %
aol.com	9,101	0.35 %	44.12 %	2.15 %	0.35 %
hotmail.com	5,846	1.71 %	35.59 %	3.03 %	0.09 %
comcast.net	3,430	4.26 %	54.81 %	2.78 %	0.46 %
me.com	2,924	0.44 %	88.39 %	1.67 %	0.79 %
icloud.com	2,751	1.45 %	80.97 %	1.64 %	0.55 %
mac.com	2,247	0.36 %	86.69 %	1.60 %	0.71 %
outlook.com	1,388	1.30 %	37.81 %	3.67 %	0.22 %
sbcglobal.net	1,387	0.36 %	50.36 %	1.72 %	0.43 %
verizon.net	1,355	0.15 %	43.09 %	3.43 %	0.37 %
msn.com	1,098	0.82 %	50.05 %	3.12 %	0.28 %
att.net	917	0.55 %	47.48 %	3.46 %	0.33 %

Difficulty: Easy
Goal: High Value Reporting
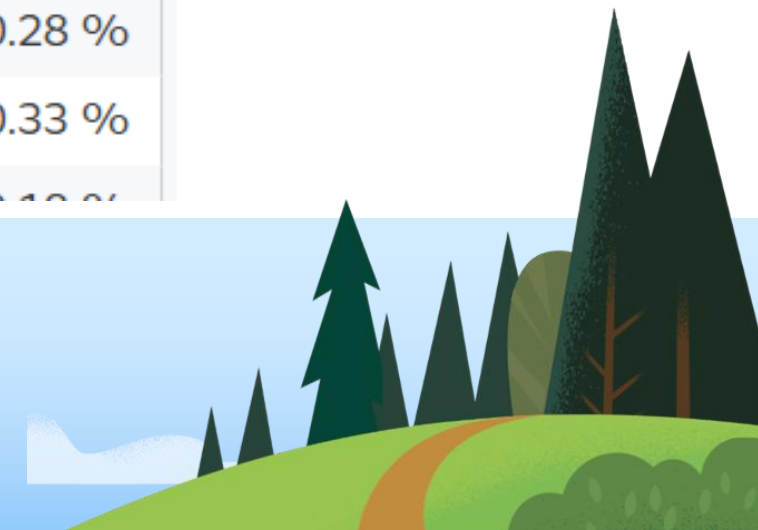
#2 PostMaster Tools

Get a Better Understanding of Deliverability

- Monitor sender reputation directly from Gmail, Yahoo, or Microsoft
- Detect deliverability issues early, like high spam complaint rates or throttling
- Links
  - Google
  - Microsoft SNDS
  - Yahoo (and AOL)

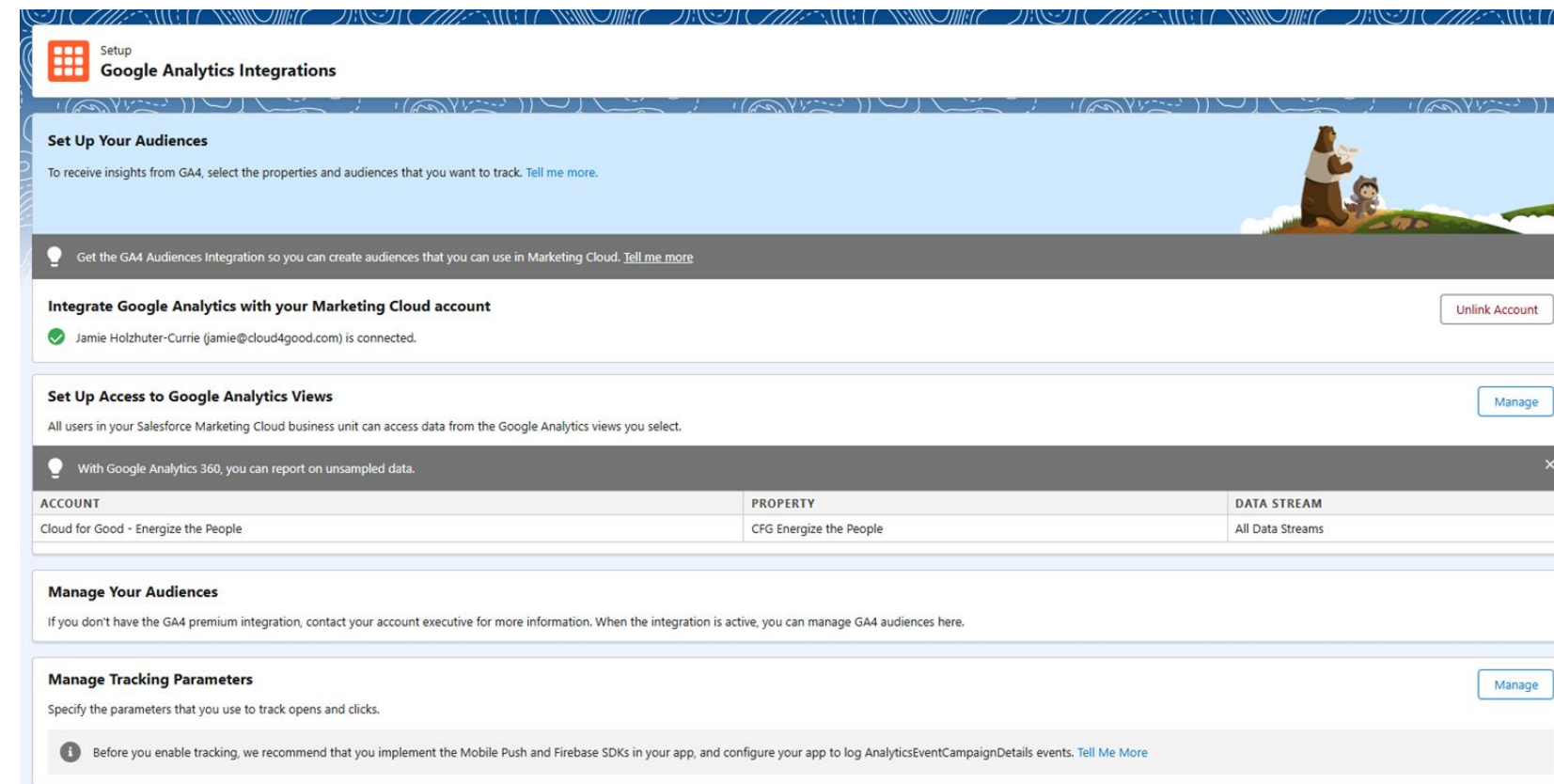**Difficulty: Easy**
Goal: High Value Reporting

#3 Google Analytics Integration

See web and email performance side-by-side

- View GA4 events *inside* Journey Builder reports
- In Marketing Cloud > Setup > Integrations
- Create Google Analytics Audiences in Marketing Cloud (requires premium integration)

Difficulty: Medium
Goal: High Value Reporting

Maximize Your Time

#4 Checklist for Sending

Hitting send is nerve-wracking

- Define the process for essential items everyone should review, usually 10-15 things like:
    - Subject line and sender profile
    - Alt text on images for accessibility
    - Call to action links going to the right place
    - Correct unsubscribe link
- Create accountability: if there is a mistake follow up to discuss their send process to prevent future mistakes

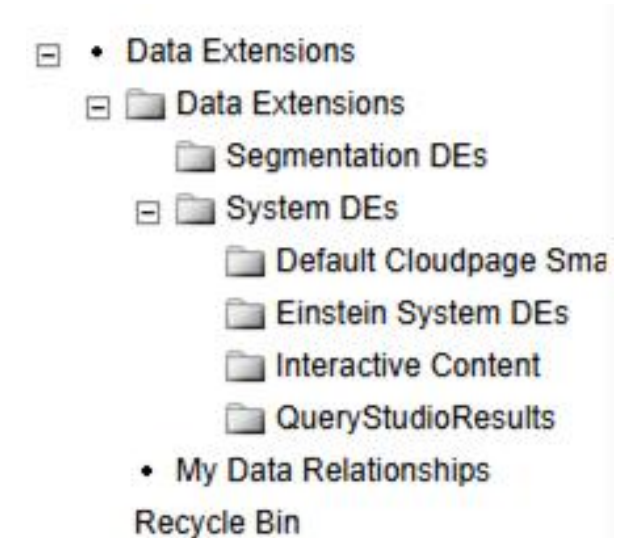**Difficulty: Medium**
Goal: Maximize Your Time

#5 Naming Conventions

Set one up and stick to it

- This is basic but it's so essential
- Makes life easier for current users and improve onboarding for new users
- Have rules for data extensions, data extension fields and content
- Delimit with underscores

Fields

Name

ContactId

AccountId

Email

SubscriberId

Prioritized

Notes

- Data Extensions
  - Data Extensions
    - Segmentation DEs
    - System DEs
      - Default Cloudpage Sma
      - Einstein System DEs
      - Interactive Content
      - QueryStudioResults
  - My Data Relationships

Recycle Bin
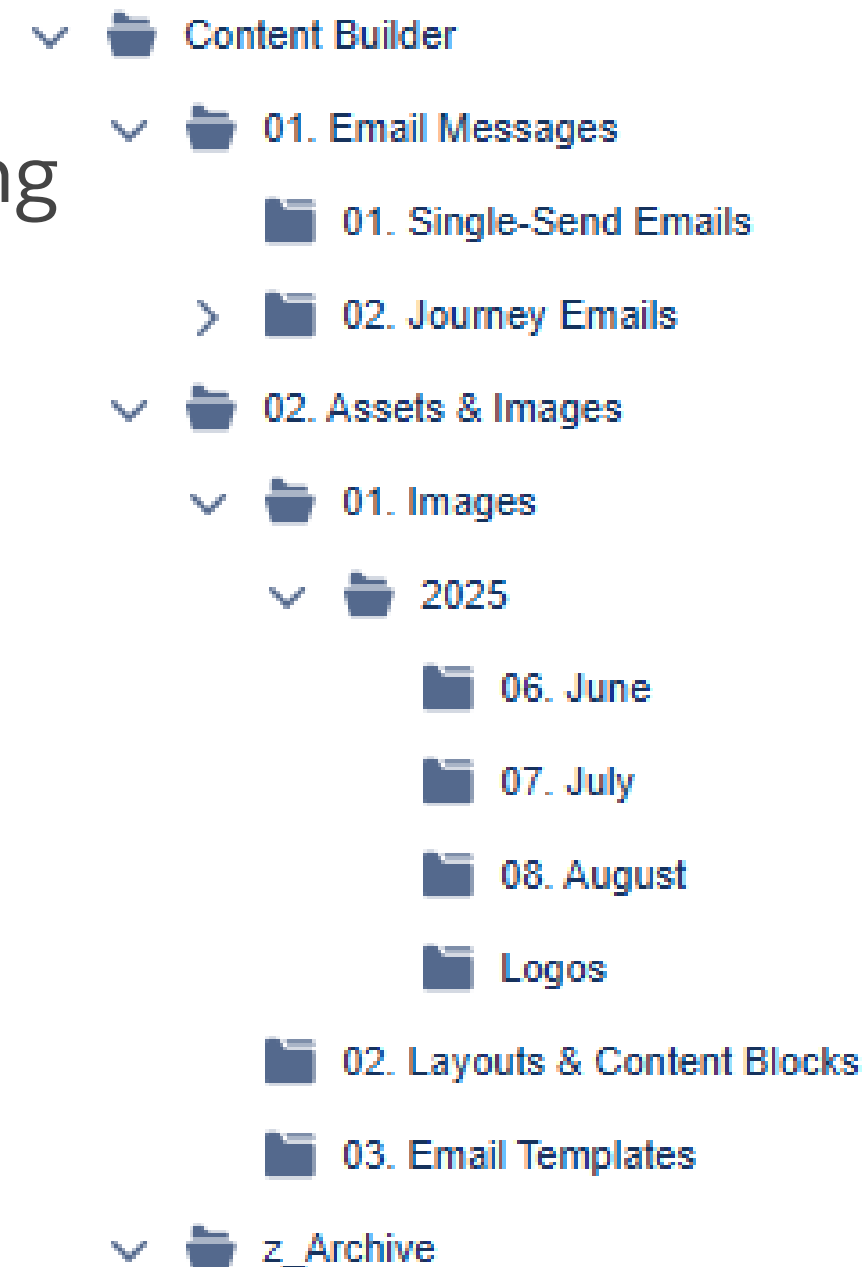
Difficulty: Easy
Goal: Maximize Your Time

#6 Folder Structure
Your Future Self with thank you

- Start folder names with numbers to make ordering easier

Difficulty: Easy
Goal: Maximize Your Time

#7 Marketing Cloud Campaigns

Not to be confused with other 'campaigns'

- Who doesn't like color coding?
- Easily report on similar campaigns in Intelligence Reports
- Tags can roll up to campaigns, allowing you to tag an email to multiple campaigns
- Campaigns must be apply at send time (not retroactively)

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Email Overview

Send Date		Business Unit	Campaign
Current	This Week (Jun 2, 2025 - Jun 8, 2025)	Select..	Select..
Compare to	Previous Week (May 26, 2025 - Jun 1, 2025)		

Education Comms
General education news or updates to education lists

Giving Tuesday
Annual Giving Tuesday campaign

Earth Month
Annual Earth Month campaign

Advancement
For Advancement campaigns with email sends to the marketing audience

Conferences
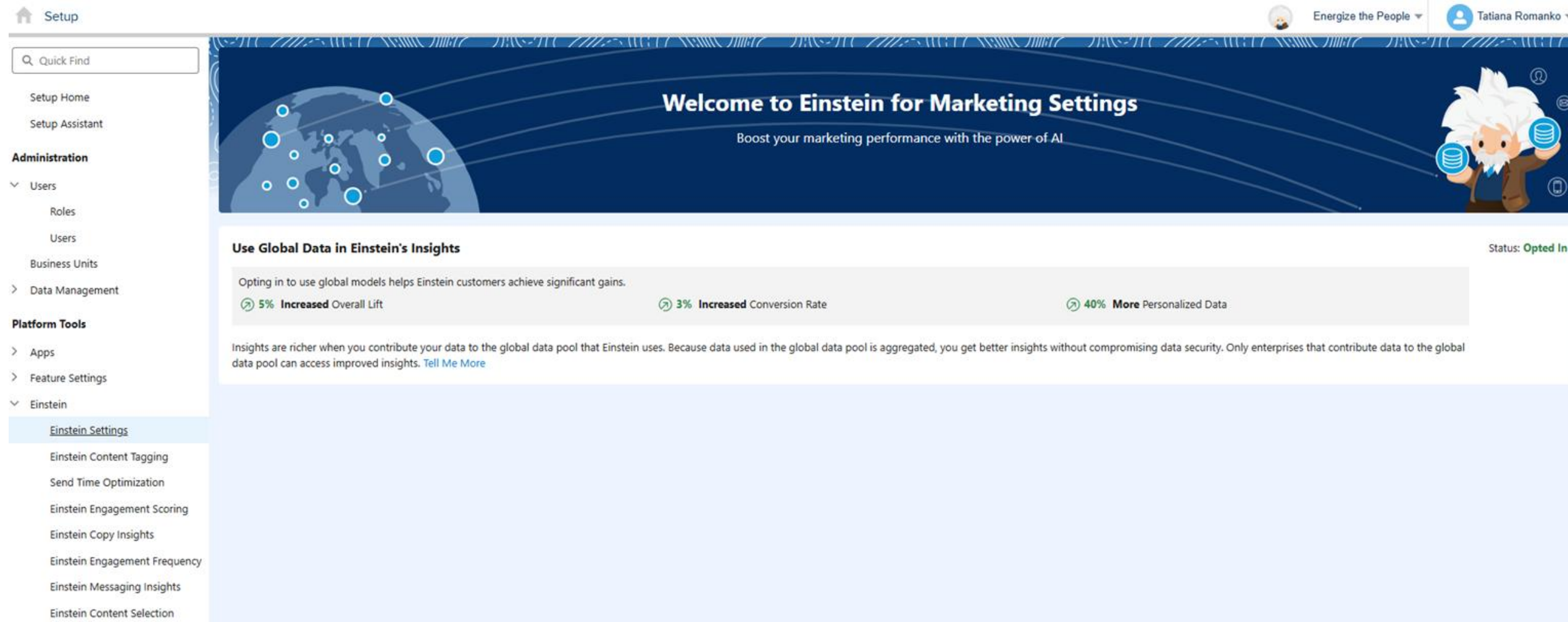Follow-up emails to conference leads

Difficulty: Easy
Goal: Maximize Your Time
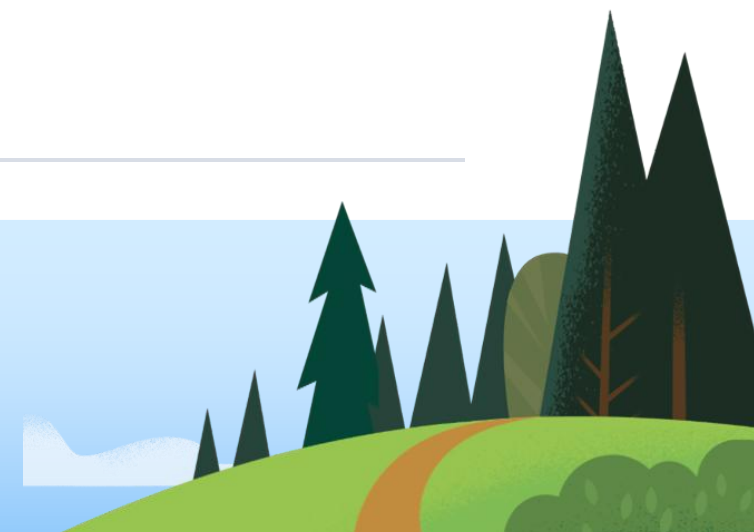
#8 Einstein & AI Capabilities

Leverage AI within your account with OOTB Einstein Features

Difficulty: Easy
Goal: Maximize Your Time

#9 Custom User Roles

1,000+ permissions of possibilities

- Use "Allow" (instead of "Deny) to create stackable roles
- Test, test, test: save a dedicated user to test changes first-hand before because some permissions can have unintended consequences

	Name	External Key	Description	Users	Business Units
☐	Shared Salesforce Data Extension...	419957	Allows user to view, create, rename, move, update, delete salesforce data exte...	0	0
☐	Solutions Engineer	417449		9	0
☐	Test Custom Role	419578	Custom role built off of MC Admin permissions	0	0
☐	Test Filtered DE Refresh permissions	419100		0	0
☐	Test Marketing Cloud Super User	419745		0	0

Difficulty: Medium
Goal: Maximize Your Time

#10 Training Quiz

Ensure your users are ready for responsibility

Knowledge Quiz

Why is it important to select the correct sender profile when configuring your send?

A) It adds the Preheader text that you have specified to your email send

B) It controls the From Name, From Address, and any custom reply mail management settings for your email

C) It controls the header and footer that are used in the email

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Knowledge Quiz

Why is it important to select the correct delivery profile when configuring your send?

A) Delivery profile allows you to schedule your send in advance

B) Delivery profile controls if a plain text version is included in your email send

C) Delivery profile controls the header and footer that are used in the email

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Difficulty: Medium
Goal: Maximize Your Time
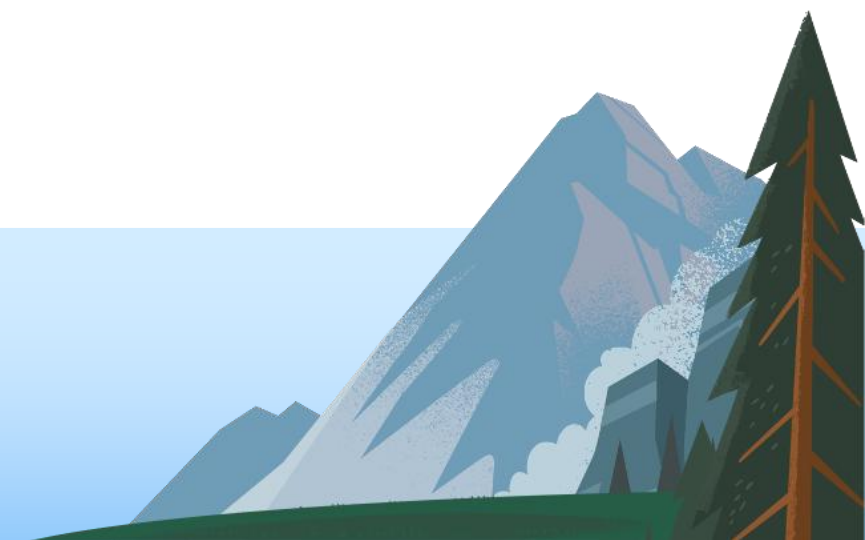
Learn!
Learn!
Learn!

#11 Upskill Technically

Especially SQL!

- There are lots free resources to make it easier to learn SQL and AMPscript
- Leveraging data at scale is the key to unlocking advanced Marketing Cloud features
- Install Query Studio Managed Package to test SQL queries in real time
- MarketingCloud30.com has self-guided challenges on AMPscript and SQL

Difficulty: Medium
Goal: Learn! Learn! Learn!

#12 Trails & Follows
Find YOUR Salesforce Ohana

- There are so many smart people in the ecosystem, you just have to find them
- Connect on Trailhead, Trailblazer Groups & Meetings, or follow them on LinkedIn!
- Too many to names to list, but here are some to start:
  - Alina Markarova
  - Ivan Razine
  - Mateusz Dabrowski
  - Lucy Mazalon
  - Pato Sapir

Difficulty: Easy
Goal: Learn! Learn! Learn!

#13 Reuse and Recycle

Templatize and share: if it works, do it again

- Your favorite journey should be a journey template
- For shared service accounts establish peer-to-peer office hours to foster sharing of best practices
- Design email templates to be modular so that new additions can be easily added as new design patterns emerge

Difficulty: Medium
Goal: Learn! Learn! Learn!

#14 Learn HTML Tables

Frustrating and fundamental

- Not common in modern web development but the essential building block of most email templates
- Challenging at first but learning the basics will help a lot

```
 1  <table align="center" border="0" cellpadding="0" cellspacing="0"
    style="width: 600px;">
 2      <tbody>
 3          <tr>
 4              <td bgcolor="#FFFFFF" width="600" colspan="2"></td>
 5              </td>
 6          </tr>
 7          <tr>
 8              <td bgcolor="#FFFFFF" width="300"></td>
 9              </td>
10              <td bgcolor="#FFFFFF" width="300"></td>
11              </td>
12          </tr>
13          <tr>
14              <td bgcolor="#FFFFFF" width="600" colspan="2"></td>
15              </td>
16          </tr>
17      </tbody>
18  </table>
```

Difficulty: Medium
Goal: Learn! Learn! Learn!

Manage Your Data (Better)

#15 Know Your Contract Limits

There are easy ways to check where you stand

- Use Setup Home to download Data Extension and Automation History
- Create a Mobile List (even if you don't use Mobile Studio) in Contact Builder with criteria "Contact Key is not null" to identify all contacts
- Automations can query contacts that are unengaged to create a list for deletion (either manually or via Script Activity)

Difficulty: Challenging
Goal: Manage Your Data

#16 Enhanced Send Log

Enterprise or BU Level

- Capture details about each individual email at time of send
- Add custom fields like EmailAddr and View_Email_URL to automatically capture details from the send
- Use the ErrorCode to debug issues when sending

Fields						Edit Fields
Name	Data Type	Length	Primary Key	Nullable	Default Value	
JobID	Number		☐	☑		
ListID	Number		☐	☑		
BatchID	Number		☐	☑		
SubID	Number		☐	☑		
TriggeredSendID	Text	36	☐	☑		
ErrorCode	Number		☐	☑		
ContactID	Text	18	☐	☑		
EmailAddr	EmailAddress	254	☐	☑		
EmailName_	Text	255	☐	☑		
DateSent	Date		☐	☑	Current Date	
MemberID	Text	10	☐	☑		
View_Email_URL	Text	400	☐	☑		

Difficulty: Easy
Goal: Manage Your Data

#17 Reference Content

Centralize reused elements

- You most likely have pieces of your email templates that should be the same for all emails like social media links or footer details
- Use a reference content block in the template so that it can be updated in one place
- Restrict access to the block so non admins don't accidentally change it

Difficulty: Challenging
Goal: Manage Your Data

#18 Audit User Access

Tired of re-activating users?

- Use the AccountUser object to warn users before their access will expire
- Workflow:
  - Weekly email with WSProxy call to AccountUser
  - Write a table in the email of users whose last log-in is nearing the account limits
  - Send email to admin(s) to personally reach out
- Recommend personal reach out so an admin can confirm if the does or does not need access anymore

Difficulty: Challenging
Goal: Manage Your Data

#19 Hit Delete

Do you *REALLY* Need It?

- Implement an annual 'spring cleaning' routine to get rid of unneeded assets, especially data extensions
- View your current data extension storage limits in Setup
- Implement data retention on ad hoc data extensions to automate removal
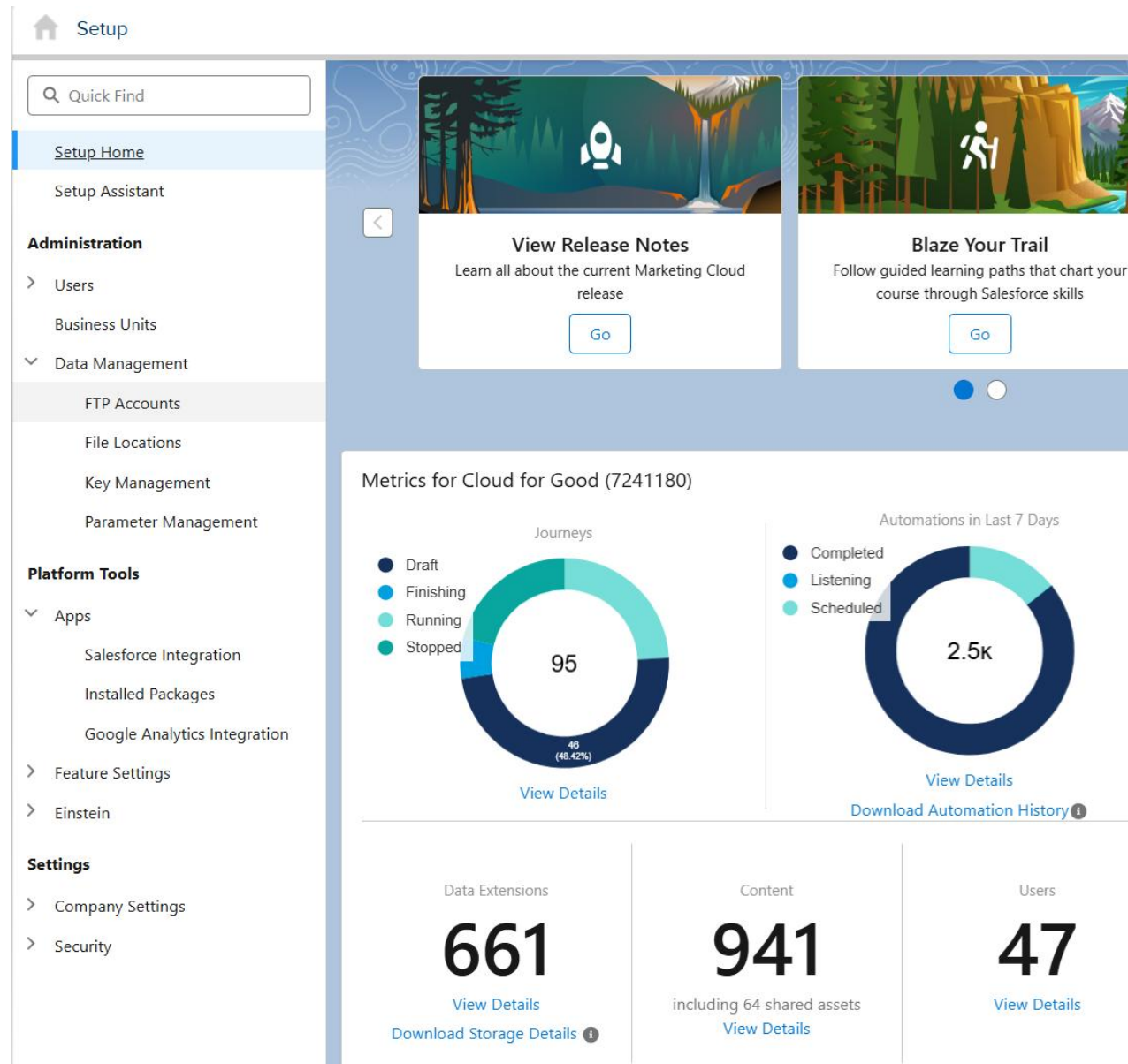
Difficulty: Easy
Goal: Manage Your Data

#20 Syncing Data to CRM

RMM's, Bounces, Unsubscribes, etc.

- If enabled, the Marketing Cloud Connector syncs back Individual Email Results and some opt-outs to Salesforce CRM, but there are caveats:
  - Bounce details are not updated on a Contact record in Salesforce
  - Reply Mail Management will update the All Subscribers status in a child business unit it and it will update the HasOptedOutofEmail checkbox (which may not align with your business processes)
- Leverage Automations and Script Activities to ensure data in all systems support how you work

Difficulty: Challenging
Goal: Manage Your Data

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Thank you