DRIVE SALES WITH ACCOUNT ENGAGEMENT (PDX101)

OVERVIEW

Discover how to drive more qualified leads, nurture prospects through the sales cycle, and sell more effectively using Account Engagement. In this 3-day class, our experts will show you how to design and implement marketing workflows in Account Engagement to make data-driven decisions and drive your company's business forward. Learn how to create and automate dynamic emails, generate and qualify leads, and leverage reports and data to boost sales.

WHO SHOULD TAKE THIS COURSE?

This course is designed for Account Engagement Marketers and Salesforce Administrators responsible for designing, building, and implementing marketing workflows and reports using Account Engagement. It's also for Business Users looking to learn more about Account Engagement. This course is a great foundation builder for anyone looking to take the Salesforce Certified Marketing Cloud Account Engagement Specialist Exam.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Enable Account Engagement.
- Explain the relationship created between Account Engagement and Salesforce once the Account Engagement has been enabled.
- Generate leads with Account Engagement's various lead generation tools including Forms, Landing Pages, and Custom Redirects.
- Manage leads with Account Engagement's lead management tools including Page Actions, Automation Rules, Segmentation Rules, Dynamic Lists, and Completion Actions.
- Engage leads with Account Engagement's lead engagement tools including Email, Personalization, Dynamic Content, and Engagement Studio.
- Qualify leads with Account Engagement's scoring and grading functionality.
- Interpret data generated via Account Engagement's reporting capabilities.
- Design and execute successful end-to-end marketing workflows using Account Engagement.

PREWORK

Please complete the following trailmix before attending our expert-led class :

Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

CERTIFICATION

PDX101 is recommended to prepare Salesforce Certified Marketing Cloud Account Engagement Specialist Exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

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DURATION
3 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

EI-INSTITUT
A Cognizant Company

salesforce authorised training provider

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LESSONS & TOPICS

Course introduction
- Review course objectives
- Set learner expectations
- Review housekeeping items
- Review additional course resources
- Explore course case study

Salesforce integration
- Understand the Account Engagement Salesforce relationship
- Sync data between Salesforce and Account Engagement
- Enable Account Engagement in Salesforce
- Create custom fields
- Review Salesforce campaigns

Administration
- Create an Account Engagement dashboard
- Authenticate your email sending domains
- Sync with third-party applications using connectors
- Restore assets from the recycle bin
- Create and assign users and user groups
- Understand usage governance

Visitors and prospects
- Understand Account Engagement visitors
- Understand Account Engagement prospects

List management
- Create list types
- Organize prospects using static lists
- Test emails using test lists

Personalization and email marketing
- Personalize your emails with HML and advanced dynamic content
- Automate Email Marketing
- Create email templates
- See what works best for your audience using AB testing
- Track email performance using email reports

Forms and landing pages
- Capture leads with forms
- Convert visitors to leads using landing pages
- Track leads with forms and landing page reports
- Track clicks using custom redirects
- Create custom redirect reports

Lead management
- Trigger page actions
- Automate actions from a marketing element using completion actions
- Create a list of prospects and apply a segmentation action using segmentation rules
- Create repeatable, criteria-based automation rules
- Create dynamic lists
- Choose an automation tool

Lead qualification
- Understand prospect scoring
- Grade prospects based on profiles

Lead nurturing
- Build an engagement program
- Create engagement program reports

Learn the Foundations of AI
Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.

EI-INSTITUT AI **Cognizant** Company

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