

Salesforce Marketing Cloud Account Engagement – Comprehensive Training Outline

1. Introduction & Setup

- Overview of Salesforce Marketing Cloud Account Engagement and its key differences from Marketing Cloud.
 - Understanding the B2B marketing funnel: Visitors, Prospects, MQLs, SQLs.
 - Core concepts of B2B marketing automation and Account Engagement architecture.
 - Setup and configuration of the Pardot–Salesforce Connector.
 - User management, including roles and permissions.
 - Importance of custom fields and their mapping to Salesforce.
 - **Hands-on:** Identify key dashboard sections, customize views, and explore a sample prospect record to understand fields, activities, and engagement history.
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2. Prospect Management & Segmentation

- Deep dive into Prospects and their lifecycle.
 - Working with standard and custom prospect fields.
 - Creating and managing Segmentation Rules, Dynamic Lists, and Tags.
 - Implementing Scoring and Grading models for effective lead qualification.
 - Domain management: setting up Tracker Domains and Email Sending Domains.
 - **Hands-on:** Create sample Prospects, set up segmentation and dynamic lists, and define scoring rules.
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3. Email Marketing & Engagement Studio

- Designing and managing Email Templates, List Emails, and Automation Rules.
 - Conducting A/B testing and interpreting email performance reports.
 - Overview of Engagement Studio: building logic-based nurture journeys with actions, triggers, and rules.
 - **Hands-on:** Create and send list emails, design an email template, and build an Engagement Studio program. Monitor engagement and analyze metrics.
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4. Forms, Landing Pages, and Campaign Automation

- Creating and managing Connected Campaigns.
- Building Pardot Forms and Form Handlers with progressive profiling.

- Designing and deploying Landing Pages for lead capture.
 - Differentiating between Automation Rules, Completion Actions, and Segmentation Rules.
 - Applying Scoring, Grading, and Automation in lead qualification.
 - **Hands-on:** Create Campaigns, build Pardot Forms and Landing Pages, and set up Automation Rules.
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5. Lead Management, Reporting & Analytics

- Managing lead assignment and routing through Assignment Rules and sync behavior.
- Understanding Campaign Influence and ROI reporting.
- Using B2B Marketing Analytics (B2BMA) for data-driven insights.
- Generating and interpreting Email Performance Reports.
- Implementing deliverability best practices and ensuring compliance (CAN-SPAM, GDPR).
- **Hands-on:** Configure completion actions, explore dashboards, build reports, and review engagement performance.