

## Prepare for your Marketing Cloud Consultant Exam CRT-550

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### Course Summary

#### Description

Take the next step in your career and become a Salesforce Certified Marketing Cloud Consultant. In this 1-day, expert-led certification prep class, boost your exam readiness with a detailed exam overview, exam resources, and practice exam questions to test your knowledge.

#### Objectives

At the end of this course, students will be able to:

- Understand what the Salesforce Certified Marketing Cloud Consultant Exam covers.
- Familiarize yourself with the resources necessary to prepare for the exam.
- Successfully answer example test questions.

#### Topics

- Course Introduction
- Discovery
- Marketing Cloud Connect
- Account Configuration
- Reporting
- Data Design
- Email Build
- Contact Builder
- Journey Builder
- Course Wrap-Up

#### Audience

This course is designed for digital marketers and consultants who already hold the Salesforce Marketing Cloud Administrator credential, have 6+ months of Marketing Cloud implementation/consulting experience, and are preparing to take and pass the Salesforce Certified Marketing Cloud Consultant Exam.

#### Prerequisites

There are no prerequisites for this course.

#### Duration

One day

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### Course Outline

#### I. Course Introduction

- A. Course Purpose
- B. Agenda
- C. Learner Expectations
- D. Exam Overview

#### II. Discovery

- A. Provided with a set of business requirements, determine what additional information is needed to design the recommended solution.
- B. Provided with a list of branding and creative strategies, probe for additional information that is needed to recommend an appropriate solution.
- C. Provided a customer environment and goals, determine the viability of external systems that need to be included in the solution (I.e. POS, CRM, e-commerce, data warehouse, data source inputs).
- D. Demonstrate how to gather requirements in order to put together the data and segmentation strategy for the customer (I.e. frequency, complexity, volume of sending).
- E. Given a scenario that includes customer information about subscriber acquisition, management, and attrition, utilize this information to select solution components.
- F. Given a solution, recommend the appropriate customer skill sets required to utilize the Marketing Cloud application.

#### III. Marketing Cloud Connect

- A. Understand the prerequisites to consider prior to starting a Marketing Cloud Connect configuration (I.e. Salesforce edition, list of integration users, scope user, administrator credentials).
- B. Understand how to send an email to a contact, lead, campaign, and report via the Sales/Service Cloud and Marketing Cloud (I.e. sending, triggered, automated).

- C. Understand how Sales/Service Cloud data in the Marketing Cloud can be segmented.

#### IV. Account Configuration

- A. Given a customer scenario, recommend the appropriate Marketing Cloud role based on User Stories.
- B. Determine which type of customer scenario warrants the creation of a business unit (I.e. publication types, demographic, workflow processes, and organizational structure).
- C. Given a scenario, troubleshoot issues regarding Reply Mail Management.
- D. Analyze the impact of applying Sender Authentication Package (SAP) to a business unit (I.e. link wrapping, Landing Pages, image URLs).

#### V. Reporting

- A. Explain how the information in data views and tracking extracts are accessed.
- B. Compare and contrast standard reports, data views, and tracking extracts.
- C. Summarize Send Logs including when/why to use it; how to create and manage.

#### VI. Data Design

- A. Explain the various data objects in the Marketing Cloud (I.e. data extensions, list model, data retention model, publication lists, suppression lists).
- B. Understand available data types, retention, and template options when building a data extension.
- C. Understand how data is retrieved within a Relational Data Model (I.e. basic SQL).
- D. Given a customer scenario, recommend the appropriate import method with lists or data extensions.
- E. Understand the implications of a system being database of record.

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#### *VII. Email Build*

- A. Understand the required steps to build, test, and deploy an email based on customer requirements.
- B. Explain the various ways to individualize email content (i.e. AMPscript, personalization strings, Dynamic Content, Guide Template Language).
- C. Compare and contrast the ways to individualize content, such as: SSJS vs. AMPscript, Dynamic Content Wizard vs. AMPscript/ LookupRows function.
- D. Explain various Marketing Cloud Email technologies (i.e. Link Alias tags, Impression regions, Web Analytics Connector).

#### *VIII. Contact Builder*

- A. Explain the role and capabilities within Contact Builder.
- B. Understand how cardinality impacts data modeling.
- C. Summarize how to use Data Designer to incorporate data source into Contact Builder.
- D. Given a customer scenario, know how to build an Attribute Group to be used for a simple interaction.

#### *IX. Journey Builder*

- A. Compare and contrast automation tools such as Journey Builder and Automation Studio.
- B. Given a customer scenario that includes Journey Builder, evaluate the requirements, activities, and steps.
- C. Explain the requirements for and the methods by which a contact can enter a Journey.

#### *X. Course Wrap-Up*