

## **Audience Creation** <sup>[1]</sup>

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A crucial role of an eComm Specialist is to create audiences. Before diving into the multi-step process, it's important to have a basic understanding of terminology and the end-user experience.

- [Salesforce Data Model](#) <sup>[3]</sup>
- [Standard vs. Individual Contacts](#) <sup>[4]</sup>
- [Salesforce Campaigns & Reports](#) <sup>[5]</sup>
- [Sharing Salesforce Report Folders](#) <sup>[6]</sup>
- [Marketing Cloud Data Extensions](#) <sup>[7]</sup>
- [Send Marketing Cloud Email](#) <sup>[8]</sup>
  - [Unsubscribes](#) <sup>[9]</sup>

### **APPLY YOURSELF**

Make a copy of the [eComm Specialist Training Plan](#) <sup>[10]</sup> for the opportunity to apply each step.

Check out a spreadsheet that can serve as a checklist when creating a new audience so you don't miss any minor step <sup>[11]</sup>.

### **1) Create Campaign (if applicable)**

If a user provides a list of folks to email, you'll need to create a Salesforce Campaign (share it) and add Campaign Members <sup>[12]</sup>. eComm Specialists can add Campaign Members to a Campaign in bulk using Apsona or one by one.

[Salesforce Campaign Wiki](#) <sup>[12]</sup>

*Use your copy of the eComm Specialist Training Plan to create 11 different Campaigns and practice uploading Campaign Members. Each tab (Campaign 1-11) contains a test data set to upload. Paste the Campaign URL into C1 of the respective tab.*

Reporting on Email and Event Campaigns is the same - the only difference is Event Campaigns are automatically created via a Cvent-Salesforce Integration <sup>[13]</sup> while Email Campaigns are created manually.

## 2) Create Report (required)

A Report is how an audience is captured in Salesforce for a Marketing Cloud email to deliver to. Salesforce Reports are based on [Salesforce data](#) [3] - this could be the Campaign created in step one or data from a source system (examples below). Use the [Reporting wiki with templates for common audience queries](#) [14]. Each template can be customized to specify your targetted population further.

[Salesforce Report Wiki](#) [14]

### Examples of Reports based on Campaigns:

- Donors who gave to a specific fund
- People who walked into my office today
- Prospective Students
- Event Registrants (if using Cvent, this Campaign is automatically created via an integration)

All of these populations must leverage Campaigns. In other words, they do not exist in Salesforce as a data point from a source system, so this data must be uploaded (via Campaigns and Campaign Members).

### Examples of Reports based on Source System Data:

- UCCS Degreed Alumni
- Active CU Denver Business School students
- System Employees

All of these populations can be queried in Salesforce based on data integrated from a source system.

*Use your copy of the eComm Specialist Training Plan to create a variety of Reports. Navigate to the tab labeled **Reports** to use the description in Column A to create a Report (paste the URLs in Column C).*

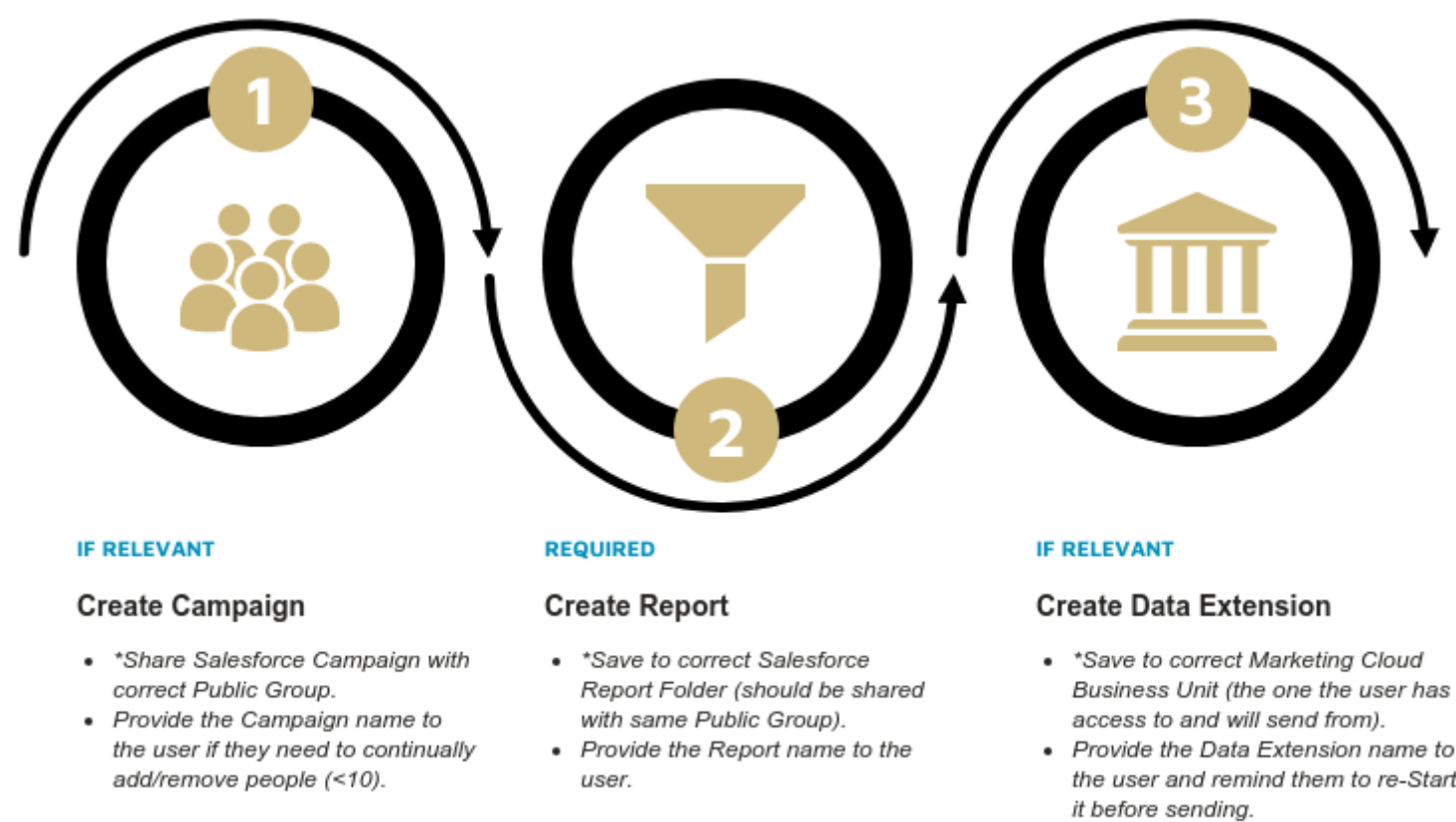
## 3) Create Data Extension (if applicable)

If the communication is intended for internal audiences (faculty, staff, or students), you'll want it delivered to their campus email addresses (e.g., @colorado.edu, @ucdenver.edu, @cu.edu, or @uccs.edu). To do so, you'll need to send to a Data Extension. An eComm Specialist will [create the Data Extension](#) [15], but it's the sender's responsibility to re'Start' it before each send.

[Data Extension Wiki](#) [15]

Use your copy of the eComm Specialist Training Plan to create Data Extensions. See the tab labeled **Data Extensions** and paste the Data Extension name in Column E.

It's also possible to upload external data from a CSV file into a Data Extension [16].



*\*Failure to share or save correctly will prevent the user from being able to send.*

**Display Title:**

Audience Creation

**Send email when Published:**

No

**Source URL:**<https://www.cu.edu/blog/ecommerce-wiki/audience-creation>

**Links**

[1] <https://www.cu.edu/blog/ecommerce-wiki/audience-creation> [2] <https://www.cu.edu/blog/ecommerce-wiki/author/39> [3] <https://www.cu.edu/ecommerce/strategy/data-model-tools> [4] <https://www.cu.edu/blog/ecommerce-wiki/standard-contacts-vs-individual-contacts> [5] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-campaign-vs-salesforce-report> [6] [https://docs.google.com/document/d/1sY-bJFpVSvZ32Fs3j1y3COUKyR5b\\_Ttd6SW2DBV1CoQ/edit#](https://docs.google.com/document/d/1sY-bJFpVSvZ32Fs3j1y3COUKyR5b_Ttd6SW2DBV1CoQ/edit#) [7] <https://www.cu.edu/blog/ecommerce-wiki/marketing-cloud-data-extension> [8] <https://www.cu.edu/blog/ecommerce-wiki/send-marketing-cloud-emails> [9] <https://www.cu.edu/blog/ecommerce-wiki/unsubscribe-details> [10] [https://docs.google.com/spreadsheets/d/1wgFcL-3XMHU\\_o7x3WtCRBcu6NDe1ood5zbXK66L\\_4J0/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1wgFcL-3XMHU_o7x3WtCRBcu6NDe1ood5zbXK66L_4J0/edit?usp=sharing) [11] [https://docs.google.com/spreadsheets/d/1LuaBTw2DRmgpEOx1\\_miWXV2jG5py-rALon1GHjYiS5E/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1LuaBTw2DRmgpEOx1_miWXV2jG5py-rALon1GHjYiS5E/edit?usp=sharing) [12] <https://www.cu.edu/blog/ecommerce-wiki/create-salesforce-campaign-and-add-campaign-members> [13] <https://www.cu.edu/blog/ecommerce-wiki/automatic-cvent-salesforce-integration> [14] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-reporting> [15] <https://www.cu.edu/blog/ecommerce-wiki/create-marketing-cloud-data-extensions>

[16] <https://www.cu.edu/blog/ecommerce-wiki/import-file-data-extension>