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Home > Audience Creation

Audience Creation [1]

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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 [3]
- Standard vs. Individual Contacts [4]
- Campaigns vs Reports vs Data Extensions [5]
- Sharing Salesforce Report Folders [6]
- Marketing Cloud Data Extensions [7]
- Send Marketing Cloud Email [8]
    - Unsubscribes [9]

APPLY YOURSELF

Make a copy of the eComm Specialist Training Plan [10] 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 [11].

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 [12]. eComm Specialists can add Campaign Members to a Campaign in bulk using Apsona or one by one.

Salesforce Campaign Wiki [12]

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 [13] 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).*

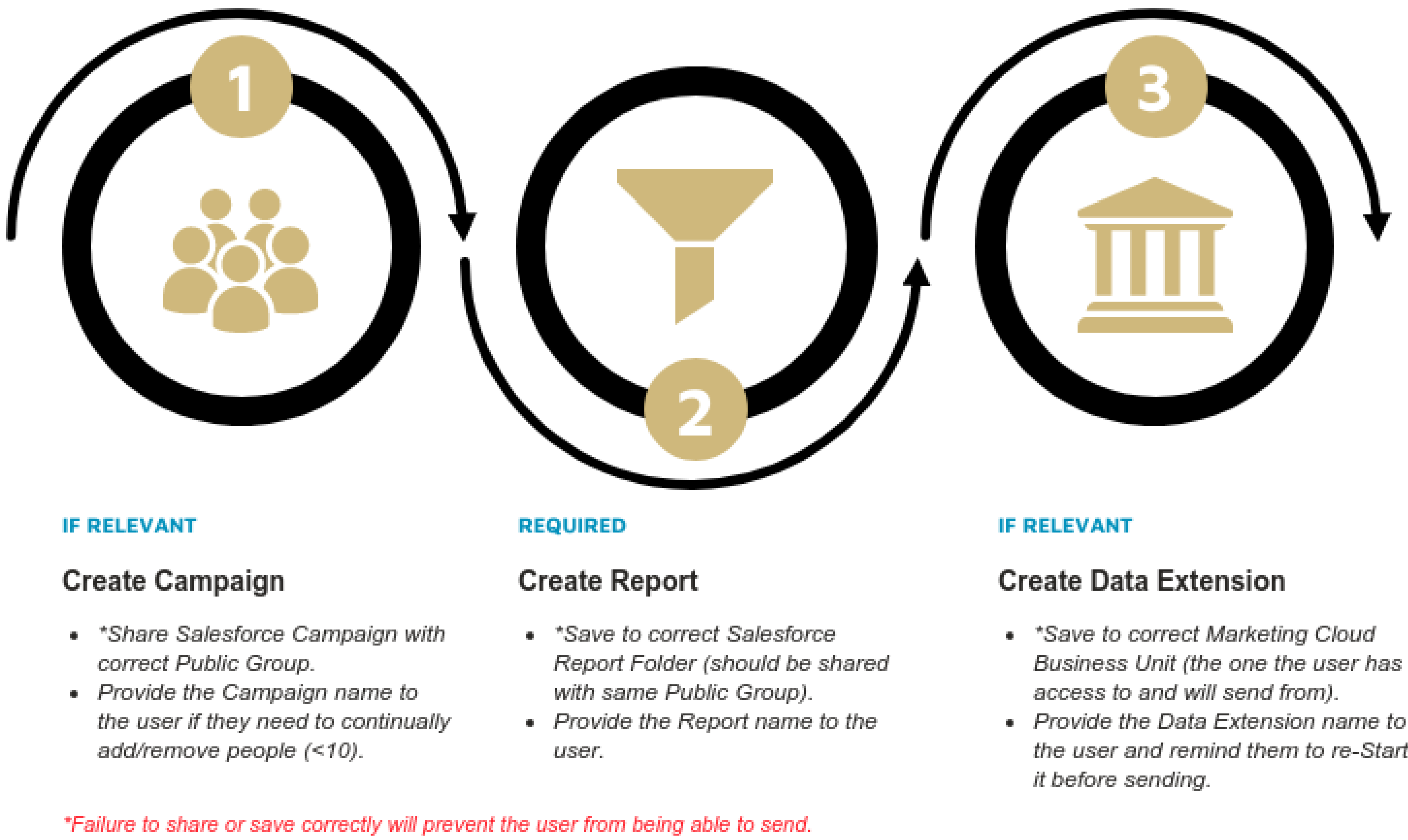
3) Create Data Extension (if applicable)

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].



Audience Creation Checklist PDF [17]

Audience Creation Checklist

Campaign (if relevant)

- [ ] Create Campaign

  Follow Naming Convention, Quality Description, Type = Email, Active=Checked
- [ ] Share Campaign with Public Group
- [ ] Import Campaign Members to Campaign

Report (required)

- [ ] Create Report ('Save As' Existing Report or Use Report Template*)

  Follow Naming Convention, Quality Description, Correct Filter Criteria, TXN vs Commercial
- [ ] Save to Correct Folder
- [ ] Creating a Data Extension?

  Include Columns: Contact ID, Relevant Email Address, Any Data for Personalization or Dynamic Content

cu.edu/ecomm/salesforce-reporting

Data Extension (if relevant)

- [ ] Create Data Extension (Interactions >> Import >> Create)

  Include Columns: Contact ID = Key, Relevant Email Address: Data Type = Email Address, Any Data for Personalization or Dynamic Content
- [ ] Move Data Extension to Folder (Subscriber >> Salesforce Data Extensions)
- [ ] 'Start' Data Extension Before Sending (Sender's Responsibility)

[17]

Audience Creation Checklist (4).pdf [18]

Display Title:

Audience Creation

Send email when Published:

No

Links

[1] https://www.cu.edu/blog/ecomm-wiki/audience-creation [2] https://www.cu.edu/blog/ecomm-wiki/author/39 [3] https://www.cu.edu/ecomm/strategy/data-model-tools [4] https://www.cu.edu/blog/ecomm-wiki/standard-contacts-vs-individual-contacts
[5] https://www.cu.edu/blog/ecomm-wiki/campaigns-vs-reports-vs-data-extensions
[6] https://docs.google.com/document/d/1sY-bJFpVSvZ32Fs3j1y3COUKyR5b_Ttd6SW2DBV1CoQ/edit#
[7] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-data-extension [8] https://www.cu.edu/blog/ecomm-wiki/send-marketing-cloud-emails [9] https://www.cu.edu/blog/ecomm-wiki/unsubscribe-details [10] 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 [12] https://www.cu.edu/blog/ecomm-wiki/create-salesforce-campaign-and-add-campaign-members [13] https://www.cu.edu/blog/ecomm-wiki/automatic-cvent-salesforce-integration [14] https://www.cu.edu/blog/ecomm-wiki/salesforce-reporting [15] https://www.cu.edu/blog/ecomm-wiki/create-marketing-cloud-data-extensions
[16] https://www.cu.edu/blog/ecomm-wiki/import-file-data-extension
[17] https://www.cu.edu/system/files/pages/323596-Audience%20Creation/docs/Audience%20Creation%20Checklist%20%284%29.pdf
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