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# Data Cloud Implementation Overview Guide

Salesforce, Summer '24





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# WELCOME TO DATA CLOUD

Create personalized audience segments to power your marketing with Data Cloud.

## Who This Guide Is For

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This guide is for all roles involved in the implementation of Data Cloud.

## Document Goals

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The goal of this implementation overview is to explain setup steps for a Data Cloud org using an example use case from Northern Trail Outfitters (NTO).



**Note:** PDF guides are updated regularly, so check the date of any downloaded and saved guides before beginning your implementation.

## Before Your Start

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- Identify project stakeholders.
- Identify Data Cloud users.
- Document business requirements.
- Identify data sources and integrations.
- Ensure that you have proper permissions and credentials to these data sources.
- Confirm your data and data model requirements: standard, custom, or a hybrid approach
- Determine identity resolution rules for creating unified profiles.
- Discuss desired audience segments and data required to create those segments.

## Prerequisites for this Use Case

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- Marketing Cloud admin and admin roles assigned to your user in a Marketing Cloud Enterprise parent account
  - Access to business units to obtain data
  - Access to business units to publish segment to
- Admin or owner permission to change write permissions on the AWS directory

### [Get Started Using Data Cloud](#)

Before you start using Data Cloud, review the checklist, considerations, and product navigation.

### [Data Cloud Use Case](#)

Northern Trail Outfitters (NTO) is eager to use Data Cloud to help build more personalized marketing campaigns based on data from multiple sources.

### [Overview of Data Cloud Implementation Steps](#)

To set up a new Data Cloud org, there are several implementation steps to complete.

### [Get Started](#)

Now that you completed several prerequisites, it's time to get started on those implementation steps.

## Get Started Using Data Cloud

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Before you start using Data Cloud, review the checklist, considerations, and product navigation.

To get ready for Data Cloud, confirm your team:

- Understands overall guidelines and limitations that can impact billing.
- Reviews brand management and organization structure used in Data Cloud.
- Decides on a data strategy by reviewing data model concepts.
- Analyzes your existing data and data sources.
- Plans to use unified profiles.
- Identifies an admin to set up Data Cloud.
- Lists users and their needed permissions.
- Identifies segmentation goals.

## Checklist and Considerations

Download the interactive PDF worksheet: [Data Cloud Checklist and Considerations](#).

**Worksheet: Data Cloud Checklist and Considerations**

Use this checklist to plan your implementation strategy for Data Cloud.

1 2 3 4 5 6 7 8 9 10 11  
Stakeholders Considerations Use Cases Users Data Sources Ethical Use of Data Data Model Concepts Identity Resolution Segmentation Insights Current Data

**1 Identify All Project Stakeholders**

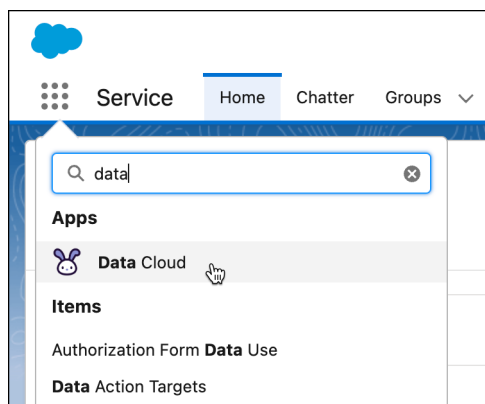
STAKEHOLDER NAME	ROLE/TITLE	EMAIL ADDRESS	RESPONSIBILITY	NOTES

**2 Review Account Requirements and Considerations**

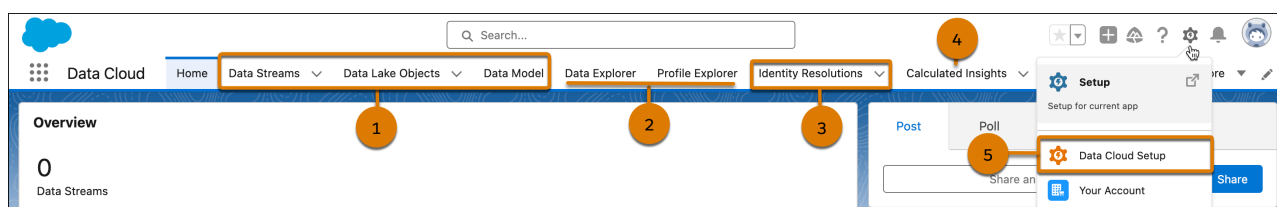
- ☐ Understand data usage types that impact billing
- ☐ Understand Data Cloud Limits and Guidelines

## Navigation

Once Data Cloud is enabled in your account, you can find Data Cloud in the App Launcher.



On the Data Cloud home page, features are organized into tabs.



The Data Streams, Data Lake Objects, and Data Model (1) tabs are focused on data ingestion and modeling.

Data Explorer and Profile Explorer (2) are data-viewing tools, allowing a view into ingested data and unified profiles.

The Identity Resolutions (3) tab is where your team creates match and reconciliation rules to unify individual records.

Calculated Insights (4) are predefined and calculated metrics that can be used in creating segments and for data analysis.

The Setup gear (5) is where the admin configures Data Cloud features.

## Data Cloud Use Case

Northern Trail Outfitters (NTO) is eager to use Data Cloud to help build more personalized marketing campaigns based on data from multiple sources.

### NTO Users

The NTO team identifies these Data Cloud users and their responsibilities.

**Marketing manager, Isabelle Givens**—Manages the overall segmentation strategy and identifies the target campaigns.

**Admin, Pia Larson**—Configures Data Cloud, provisions users, and assigns permission sets within the system. Has access to Salesforce Sales and Service Clouds in addition to other integrated systems within the core cloud platform. Also executes day-to-day configuration, support, maintenance, and regular system audits.

**Data aware specialist, Warren Mehta**—Manages the data model defined by the marketing manager and marketing specialist. Creates and manages data streams, and harmonizes those data streams into a cohesive data model to be used to build effective segments.

Creates identity resolution rulesets and assists with any API development needed for NTO. The data-aware specialist also assists with creating SQL-based calculated insights.

**Marketing specialist, Michele Hansley**—Creates, manages, and publishes segments.

## NTO Requirements

NTO has these initial requirements:

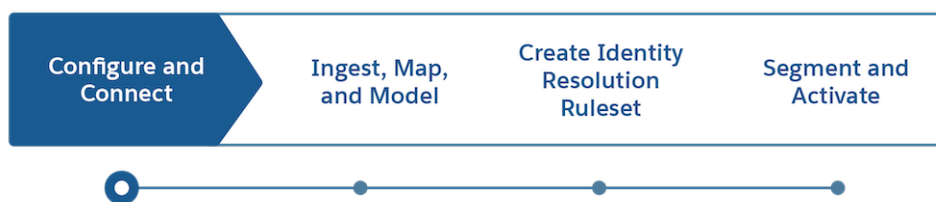
- Ingest data from their US Retail Business Unit in Marketing Cloud.
- Ingest data from their Service Cloud.
- Activate published segments to their US Retail Business Unit in Marketing Cloud.
- Build a segment for loyalty customers who prefer camping that can be used in a loyalty rewards campaign in Marketing Cloud Journey Builder.

## Overview of Data Cloud Implementation Steps

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To set up a new Data Cloud org, there are several implementation steps to complete.

Let's review the steps along with the roles responsible to complete them.



### Configure and Connect

The Data Cloud admin updates the permission set, provisions the Data Cloud account, creates users, and establishes connections with data sources.

### Ingest, Map, and Model

Data drives Data Cloud functionality. These steps for the data-aware specialist to complete are essential to set up the marketer for success in creating segments.

- Import your dataset from various sources in its original form or “as-is”.
- Extend your original source schema or blueprint if desired through formula fields. Formula fields allow you to cleanse or derive more fields so that your data is in an optimal format for segmentation and content personalization.
- Save the original source fields and the optional formula fields to collectively define your data lake objects (DLOs).
- Identify mapping requirements for identity resolution rules.
- Harmonize your preserved source schema into a cohesive, source-agnostic view by mapping your DLOs to a data model object. Select a standard data model object informed by the Cloud Information Model, or create your own.



- Ensure that relationships between data model objects are defined. Tie all objects back directly or indirectly to an entity that can be used in segmentation.



**Note:** The starter data bundles available for Marketing Cloud Email Studio, MobileConnect, and MobilePush are designed to give you fast time-to-value. With the starter bundles, data source objects are created and mapped to the data model automatically.

## Create Identity Resolution Rulesets

Identity Resolution is a key feature of Data Cloud because it helps organizations identify customers and create a Unified Profile of each customer. The data-aware specialist follows these steps.

- Create a ruleset.
- Configure matching rules.
- Select reconciliation rules.

## Segment and Activate

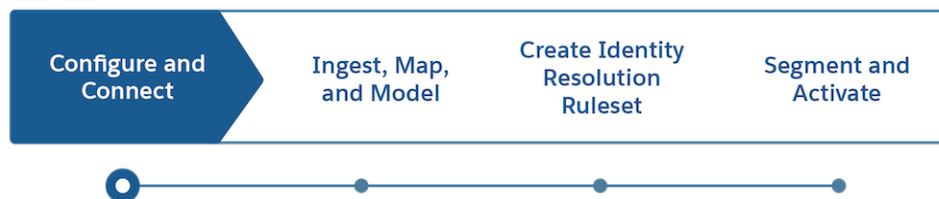
If your org has Segmentation and Activation, follow these steps. These steps are completed by the Data Cloud for Marketing Manager or Data Cloud for Marketing Specialist permission sets.

- Create your activation targets. Determine where you want to send your segmented data to be used. For example, in Marketing Cloud, s3, or another Salesforce org.
- Segment your data. Create flexible audience segments using easy drag functionality.
- Publish and activate your segment.
- Market to your customers. Use your audience segments to delight your customers with timely marketing experiences using Journey Builder.

## Get Started

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Now that you completed several prerequisites, it's time to get started on those implementation steps.



Check out the admin guide for Configure and Connect implementation steps.