Personalize Marketing Recommendations

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CONTENTS

PERSONALIZE MARKETING RECOMMENDATIONS

Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.

Get Started

🗺️	Explore system architecture related to this solution. • B2C Industry Blueprint • B2C Reference Architecture • B2C Solution Architectures
🚶	Take Trailhead modules related to this solution. • Salesforce Solution Kits: Quick Look • Customer 360 Guide for Retail: Quick Look • Customer 360 Guides: Quick Look

This solution kit helps you:

- Increase storefront visits.
- Increase engagement.
- Recommend products based on individual shopping history.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Marketing Cloud.

Required Products

- Marketing Cloud Enterprise 2.0
  - Personalization Builder
  - Journey Builder
  - Email Studio
- Commerce Cloud (SFRA or SiteGenesis)
  - Einstein Product Recommendations

Implement This Solution

Personalized Marketing Recommendations Solution Workflow
Learn how data flows through the configurations to personalize marketing recommendations.

Design Considerations
Keep these design considerations in mind when you personalize marketing recommendations.

Connector
Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud Connector for B2C Commerce to personalize marketing recommendations.
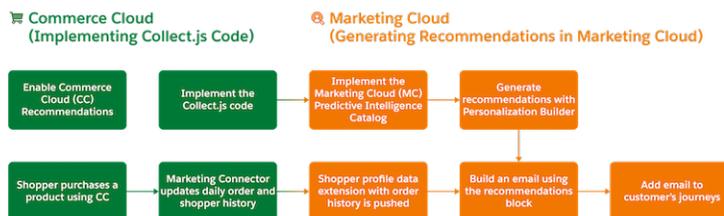
Configurations
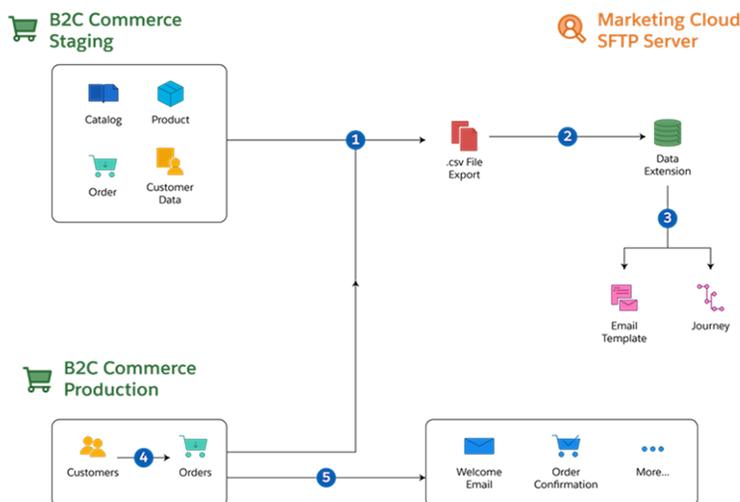Use these configurations to personalize marketing recommendations.

Personalized Marketing Recommendations Solution Workflow

Learn how data flows through the configurations to personalize marketing recommendations.

Workflow

Understand the Flow of Data

1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server so that Marketing Cloud consumes it on a schedule.

3. Use Commerce Cloud data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.

4. Extend the Commerce Cloud storefront by replacing its email functions with the Marketing Cloud Connector's trigger-send features.

5. Implement Marketing Cloud Connector customizations to trigger transactional email for common scenarios. These scenarios include Welcome Email, Order Confirmation, and Order Status Update Email.

Features of Integration Support

- HTTP, HTTP Form, FTP, SFTP, and SOAP service types.
- Services can include rate limits and enforce circuit-breaker time outs.
- Supports service-specific logging to capture custom events and output.
- Secure services with credentials and certificates that identify service parties and sign content to confirm that the message content is not tampered with.
- OCAPI shop APIs enable REST-based interactions to facilitate customer-facing shopping experiences.
- OCAPI data and metadata APIs enable data, asset, and management scenarios including data ingestion and continuous integration.
- Every B2C Commerce instance includes an embedded WebDAV server and client, ensuring PCI-compliant file transfers over HTTPS.

Functionality Considerations

- Service configuration options use Business Manager to include timeouts, rate limits, and circuit-breaker thresholds.
- Services process per-service logs that can include relevant transaction and event data.
- Use technical reports in the log center to triage service frequency, execution trends, and performance characteristics.
- Examine OCAPI services using platform documentation and the OCAPI API Explorer built on the Swagger user interface.
- Assign the Documentation User role to accounts accessing the OCAPI API Explorer.
- To modify payloads before or after service processing using hook extension points, customize OCAPI resources.
- Secure data and metadata API interactions using OAuth to authenticate requests in a user context.
- WebDAV access requires active SSL for all server requests, regardless of whether the client exposes storefront cartridges, import and export data, log files, security log files, or content libraries.

Related Content

Review this solution's use case and purpose.

- Personalize Marketing Recommendations on page 1

Take the next steps in this implementation.

- Design Considerations
- Connector
- Configurations

Design Considerations

Keep these design considerations in mind when you personalize marketing recommendations.

General Considerations

- Set up Collect and Catalog for Marketing Cloud Einstein even if you import order history using the connector.
- Build recommendations using the shopper's history data and pass the recommendations as a block image in the email.
- Use Order History data for other elements of the email.
- Let the model do its work instead of defining many filters.
- Email recommendations are different from Commerce Cloud storefront recommendations.
- Consistent recommendations are more important than matching recommendations. The goal is to use email to drive shoppers to the storefront to make a purchase.

Catalogs

- Streaming updates isn't efficient for large numbers of product SKUs.
- Language, currency, multi-brand support, and inventory affect the catalog feed model.

Click Tracking to Revenue

- Marketing Cloud Einstein base capability provides core functionality to track revenue.
- Evaluate Google Analytics as a mechanism to slice and dice the data. See Google Analytics 360 Integration for Marketing Cloud.

Performance

- For best results when importing the flat file into Marketing Cloud, limit your daily product variations in SKUs to 1 million.
- If your catalog includes more than 1 million SKUs, import delta files for the catalog.
- Import only the data you plan to use in Marketing Cloud.
- If the volume or frequency of your catalog update concerns you, contact your Marketing Cloud representative or Success Manager.

Localization

- To support localization, customize the Marketing Cloud Connector.
- If you have different inventory for the same products, consider creating a different business unit. Contact your Marketing Cloud representative or Success Manager.

Multiple Brands

- Understand what your goals are for incentives, especially with shared carts across brands, and how best to present those incentives.
- Avoid using the same cart across multiple brands.
- To ensure balanced incentives across brands, consider multiple business unit licenses.

Related Content

Review earlier steps in this solution.

- Personalized Marketing Recommendations Solution Workflow

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See Also

- B2C Custom Hooks Overview
- B2C Marketing Cloud Connector Integration Specifications
- B2C Order.xsd Salesforce XML Schema

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud Connector for B2C Commerce to personalize marketing recommendations.

The Marketing Cloud Connector for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing the connector, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case. Also, keep in mind that triggers for Personalization Builder require a paid services engagement performed by Marketing Cloud Professional Services for every abandonment scenario and business unit combination.

Before implementing the configurations, sign in to GitHub and set up the Marketing Cloud Connector using the GitHub repository wiki instructions. Are you a Commerce Cloud customer or partner and don't have access to the GitHub repository? If you have access to Xchange, you can get access to Github via this XChange article.

> **Note:** For access to Salesforce B2C Commerce XChange content, talk to your Success Manager.

General Information About Connectors

- Connectors are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Connectors support a core set of use cases that you can extend to support other customer-driven use cases.
- Connectors require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the connector integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your connector implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Connector

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud
- Simplify and centralize email authoring and content management
- Trigger transactional email from Marketing Cloud through Commerce Cloud
- Track email performance using Analytics
- Improve marketing agility, efficiency, and campaign performance
- Personalize engagement based on past purchases and shopper interactions
- Capture revenue from cart, search, or browse abandonments by implementing storefront behavior monitoring and behavioral email
- Connect Commerce Cloud and Marketing Cloud using existing REST APIs
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud

Related Content

← Review earlier steps in this solution.

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- Design Considerations

→ Take the next steps in this implementation.

- Configurations

Configurations

Use these configurations to personalize marketing recommendations.

Enable Commerce Cloud Recommendations

This step is optional. Commerce Cloud includes its own recommendations. If you want only recommendations using email, skip this step.

Set Up the Marketing Cloud Connector

Configure how often to refresh the data in Marketing Cloud. Daily updates are typical for the Marketing Cloud data extension.

Import the Product Catalog into Marketing Cloud

Import your storefront product catalog into Marketing Cloud so that the SKUs match what's imported from shopper orders.

Set Up Personalization Builder

Let the system gather data for at least 30 days to build robust shopper profiles. This data can generate personalized shopper recommendations.

Configure Email Templates

Set up email templates with the recommendations that come from Personalization Builder using dynamic content.

Related Content

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