
Take On B2B and B2C Marketing with Account Engagement and Journey Builder

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TACKLE B2B AND B2C MARKETING TOGETHER

Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multichannel messaging, journeys, and transactional messaging.



Get Started



Take Trailhead modules related to this solution.

- [Use Account Engagement Forms and Form Handlers](#)
- [Account Engagement Scoring and Grading Account Engagement Lightning App](#)

Marketing to personas throughout the buyer's lifecycle requires tools for lead generation, lead scoring, sales alignment, and multi-channel consumer marketing via journeys and transactional messaging. To manage marketing efforts across your business, learn how to harness the power of Salesforce for Marketing, including Account Engagement and Journey Builder.

This solution kit helps you:

- Generate new prospects.
- Qualify prospects using scoring and grading.
- Create qualified leads in Salesforce.
- Send customers through a journey using email, mobile, and web.

Required Products

- Account Engagement

- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud (edition must support Marketing Cloud Connect)
- Marketing Cloud (Contact Builder, Journey Builder, and Email Studio. Edition must support Marketing Cloud Connect. Marketing Cloud Connect is supported only in Salesforce Classic.)

Implement This Solution

[Workflow](#)

Learn how different buyer persona scenarios inform workflow with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

[Design Considerations](#)

Keeps these considerations in mind to support the flow of data between Marketing Cloud Account Engagement (Pardot), industry clouds, and Journey Builder.

[Marketing Cloud Connect](#)

The Marketing Cloud Connect (MC Connect) helps you integrate industry clouds with Marketing Cloud products like Contact Builder and Journey Builder.

[Configurations](#)

Use these configurations to market with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

Workflow

Learn how different buyer persona scenarios inform workflow with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

A buyer persona is essentially a collection of attributes that make an individual a good fit for a specific suite of products or services. In this solution kit, we cover two marketing scenarios: a buyer with one persona and a buyer with multiple personas.

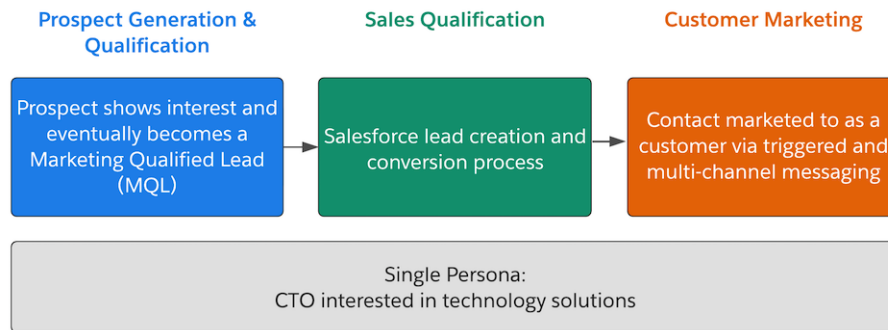
When a company has one buyer persona, a buyer moves through the interest, purchase, and customer phase with that persona. For example, a company sells a suite of educational technology products. A target buyer persona is a chief technology officer (CTO) of a school district who is interested in purchasing technology solutions. The CTO persona remains consistent throughout each stage of the customer lifecycle and, in this case, remains a B2B buyer persona.

If a business sells a wide suite of products and services, it's possible they have multiple buyer personas. In this case, each persona has different attributes that indicate their fit for each product or service. For example, an enterprise company selling healthcare technology solutions and healthcare treatment for patients has two different buyer personas. In this case, marketing tools must support the B2B and B2C sales processes.

B2B marketing supports considered purchases, where a salesperson is involved in facilitating a sale. B2B marketing strategies can also apply to B2C transactions with a considered purchase, such as real estate, recruiting, or general contracting.

B2C marketing supports transactional, direct-to-consumer sales. A salesperson isn't involved in facilitating the transaction, and most sales are done digitally. In this solution kit, transactional purchases are referred to as B2C and salesperson-facilitated sales are referred to as B2B.

Scenario 1: Single Persona (One Contact Record Type)



Functionality Considerations:

- Buyer persona is consistent throughout the prospect-to-customer lifecycle. A single set of data attributes is used for contacts.
- Account Engagement forms and qualification features are used to prioritize net-new prospects for sales reps. Use cases that include product interest forms that receive hundreds or thousands of submissions a day benefit most from this setup.
- When a prospect becomes a customer, use Journey Builder and Automation Studio to enable complex journeys and transactional and multi-channel messaging.

If customers sometimes repeat the B2B buying process, but must be marketed to as a consumer through Journey Builder, accommodate for this scenario in your design. You must keep contacts that originated in Account Engagement in your Account Engagement database. Keep these considerations in mind.

- Using Marketing Data Sharing (MDS) rules, allow contacts who originated from Account Engagement to meet your MDS criteria. Setting up MDS isn't retroactive, so existing contacts don't automatically sync to Account Engagement. Configure MDS in such a way that makes Account Engagement-generated contacts unique, and therefore lets them remain visible to Account Engagement. When an existing contact who is visible in Account Engagement submits another form, their existing prospect record and contact record are updated. If an existing contact in Salesforce who doesn't meet your MDS criteria submits a form, a duplicate lead is created rather than syncing with the existing contact record. Account Engagement can't sync with Salesforce records that don't meet the MDS criteria. Use deduplication tools in Salesforce for merging and managing lead and contact records.
- In this setup, contacts are messaged to only through Journey Builder. In Account Engagement, use an automation that marks all contacts as Do Not Email. Marking contacts as Do Not Email keeps them from receiving emails from Account Engagement and counting towards your database limit.

Pros of this approach:

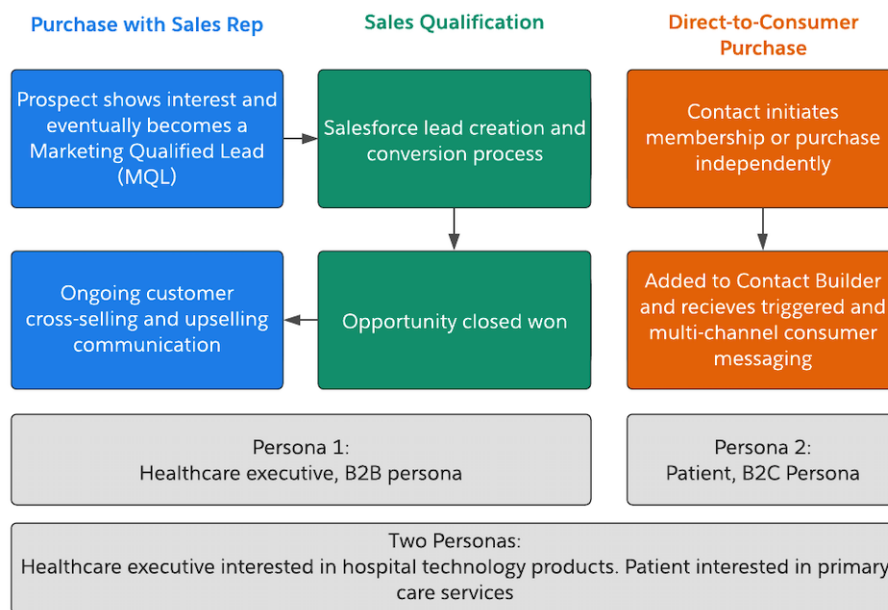
- Account Engagement data remains intact on contact records in industry clouds.
- If a contact in Account Engagement submits an Account Engagement form again, it updates the existing contact and prospect records in Account Engagement and industry clouds.

Cons of this approach:

- Your Account Engagement database is larger because it includes contacts that aren't messaged from Account Engagement. When a business unit's database exceeds 10 million prospects, it can experience performance issues. If you anticipate having a large database, talk to your Salesforce account team.
- New contacts that submit forms that don't meet your MDS criteria create a duplicate lead.

If you want to intentionally share and message to contacts in Account Engagement and Journey Builder, you must make further design considerations. We plan to address this use case in a future solution kit.

Scenario 2: Different Personas (Two Contact Record Types)



Functionality Considerations:

- Buyer persona differs based on the type of product or service being sold. For B2B sales, B2B marketing features such as industry clouds integration, account-based marketing (ABM), and ROI reporting are used in Account Engagement throughout the prospect-to-customer lifecycle. In direct-to-consumer sales, consumer marketing via transactional and multi-channel messaging at scale is done through Journey Builder messages and journeys.
- Two separate attribute datasets for contacts are used. For example, the persona for an executive that purchases healthcare technology for their company has different data than their second persona as a patient of a health plan. These separate datasets (record types) normally have different security, viewing, and retention settings.
- This use case usually fits an enterprise business model that has various brands, products, or services that span the B2B and B2C landscape, and function independently from each other.
- The contact object's record type in an industry cloud is used to separate B2B contacts that sync only to Account Engagement and person accounts that sync only to Contact Builder. To make sure that Account Engagement has visibility only for B2B contact record types, use Marketing Data Sharing rules.

Considerations for Both Scenarios

In both proposed solutions, a single persona is messaged only from Account Engagement OR Journey Builder. If you want to message the same persona across multiple platforms, you must make more design considerations. For example, if you're using Account Engagement for an ABM strategy and Journey Builder for all other marketing communication, Account Engagement and Journey Builder share the contact. Look for details about sharing and messaging contacts between these solutions in a future solution kit.



Take the next steps in this implementation.

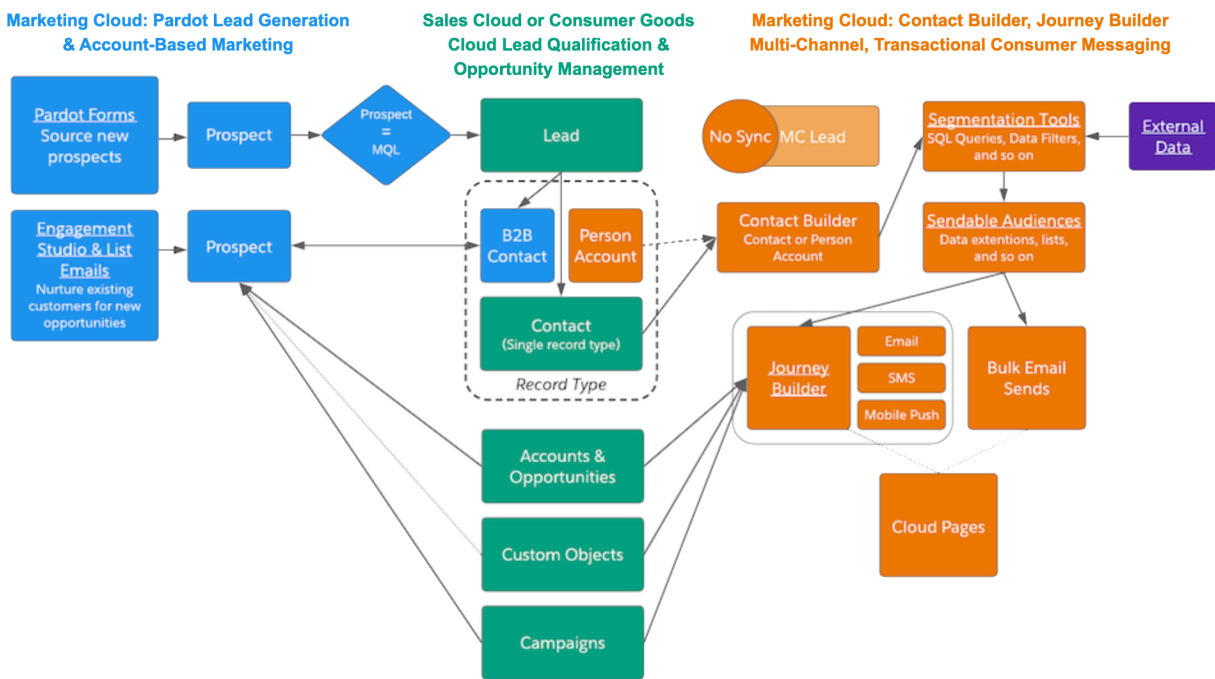
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Design Considerations

Keeps these considerations in mind to support the flow of data between Marketing Cloud Account Engagement (Pardot), industry clouds, and Journey Builder.

Understand the Flow of Data



Design Considerations

Single Persona (One Contact Record Type)

Visibility

- Account Engagement syncs with leads and some contacts. Contacts aren't messaged with Account Engagement. Marketing Data Sharing (MDS) rules are used to see all leads and contacts.
- Journey Builder only syncs with contacts. Limit the contacts that Contact Builder syncs with by applying filters (Boolean flag, date range, or All records with an email address) in the records collection sync process. You can also configure Marketing Cloud Connect with an API user who has access only to the records designated to be owned and transferred to Journey Builder.

Consent Management

- In this scenario, an individual is messaged from one system at a time. If a person is a prospect or lead, they're messaged from Account Engagement. After that persona becomes a contact, they're messaged from Journey Builder.

- We recommend setting up an automation in Account Engagement that sets all prospects that sync with a contact to Don't Email.
- The Email Opt Out field in Account Engagement automatically maps to the HasOptedOutofEmail field in an industry cloud. Make sure that this field is mapped to the contact object and is readable in other Marketing Cloud messaging features.
- Email preferences for Account Engagement lists don't map to industry clouds by default. If you need list subscriptions to carry over to the contact in Contact Builder, you can set up a series of automations. First, set up an automation that maps list subscriptions to custom fields on the lead record, then map the fields to the contact or person account record. You can also create a custom unsubscribe center that uses the API to write subscription preferences across all messaging platforms.

Duplication Management

- If an industry cloud contact with a prospect record submits an Account Engagement form, both records are updated.
- If an industry cloud contact submits an Account Engagement form but doesn't have a prospect record because it didn't meet the MDS criteria, a duplicate lead is created.

Data Architecture

- Account Engagement syncs with prospects, leads, and some contacts. However, in this scenario, Account Engagement sends emails only to prospects and leads.
- Contact Builder only syncs with contacts.
- In this scenario, Account Engagement and Contact Builder can both sync with the same contact record. However, only Journey Builder emails the contact.

Performance

- If you expect a single Account Engagement business unit to have more than 10 million prospects, talk to your account manager.
- In Contact Builder, use filters in the records collection when configuring Synchronized Data Extensions. Filters let you limit the number of Contact records that you bring into Journey Builder by including only relevant records and fields.

Different Personas (Two Contact Record Types)

Visibility

- Account Engagement syncs with prospects, leads, and contacts with a B2B record type. Use MDS rules to limit contact visibility to contacts with the B2B record type.
- Contact Builder only syncs with person accounts, which is a separate record type from B2B Contacts. Limit the contacts that Contact Builder syncs. Apply filters (Boolean flag) in the records collection sync process or configure the MCC integration with an API user that has access only to the B2C record type.

Consent Management

- In this scenario, a single persona is messaged from one system at a time. A B2B contact persona is messaged only through Account Engagement. A B2C contact persona is messaged only through Journey Builder.
- You can use the subscription management tools included in all Salesforce for Marketing products to manage email subscriptions separately.

Duplication Management

- In some use cases, a single person can exist as both personas. For example, a healthcare company that markets to a healthcare executive who is a decision maker for B2B sales and a patient at their hospital. This person would have separate contact records and would be marketed to as two separate entities.

Data Architecture



- Account Engagement syncs with prospects, leads, and contacts associated with the B2B record type. Account Engagement sends emails to prospects, leads, and contacts.
- Contact Builder syncs with person accounts. When adding person accounts in Contact Builder, use Account:PersonContactID as the unique identifier.

- You can sync leads to Contact Builder, but we strongly recommend that Account Engagement manage leads when a salesperson is involved in the sales process.
- In this scenario, Account Engagement and Contact Builder never sync with the same contact record.

Performance

- If you expect a single Account Engagement business unit to have more than 10 million prospects, contact your account manager.

Related Content

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	<p>Take the next steps in this implementation.</p> <ul style="list-style-type: none"> • Marketing Cloud Connect on page 7 • Configurations on page 8

See Also

Account Engagement

- [Marketing Data Sharing Rules](#)
- [Do Not Email and Opted Out Fields](#)

Marketing Cloud

- [Explore Cross-Cloud Engagement Data Models](#)
- [Implement Synchronized Data Sources Best Practices](#)

Industry Cloud

- [Record Types](#)
- [Person Accounts](#)

Marketing Cloud Connect

The Marketing Cloud Connect (MC Connect) helps you integrate industry clouds with Marketing Cloud products like Contact Builder and Journey Builder.

The Salesforce connector integrates Marketing Cloud Account Engagement (Pardot) with an industry cloud. All Account Engagement business units purchased after February 11, 2019 are provisioned from and connected to a designated industry cloud, Sales Cloud, or Service Cloud instance. Business units purchased before February 11, 2019 can set up the Salesforce connector.

Related Content

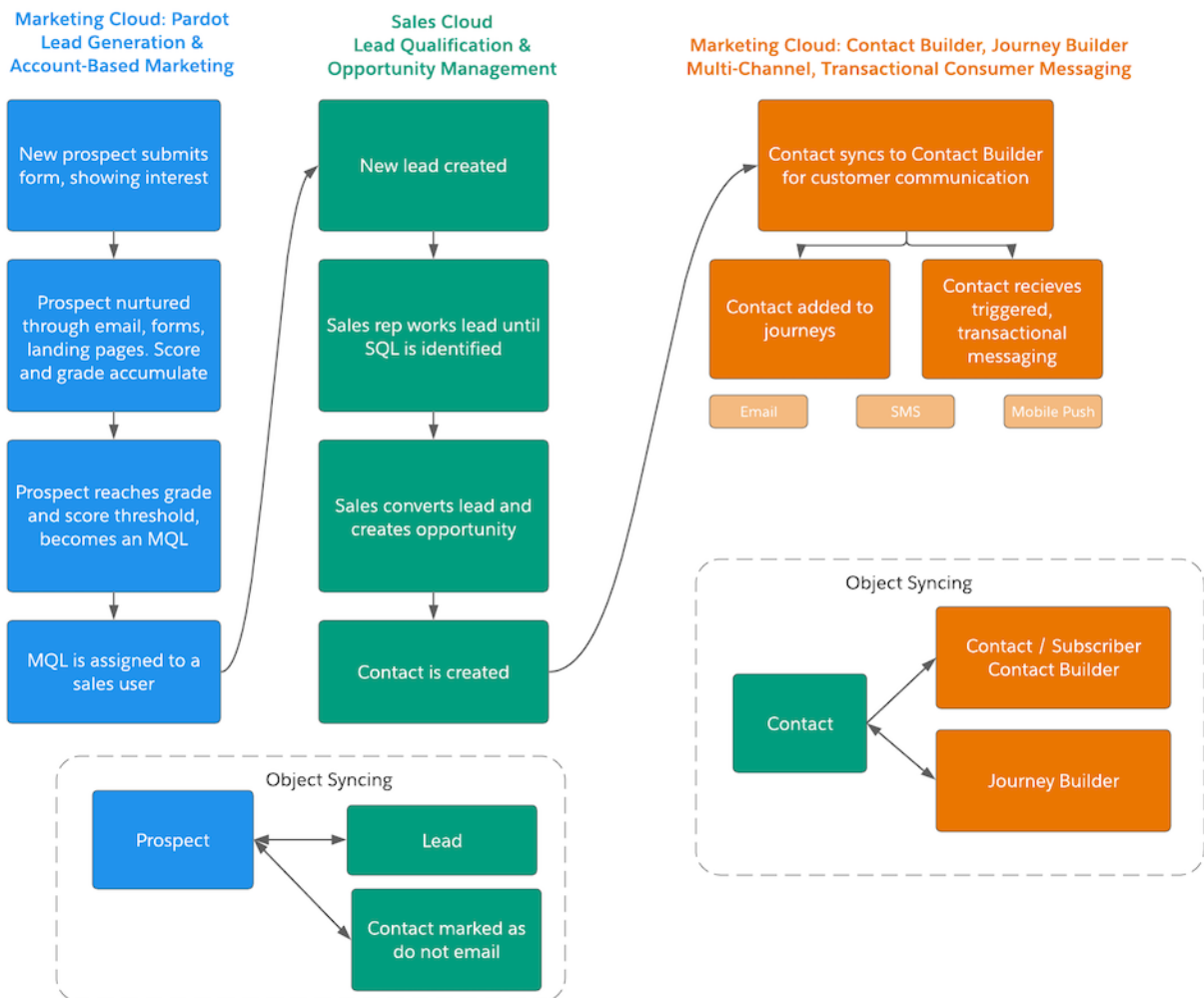
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Configurations

Use these configurations to market with Marketing Cloud Account Engagement (Pardot) and Journey Builder.

Scenario 1: Single Contact Record Type

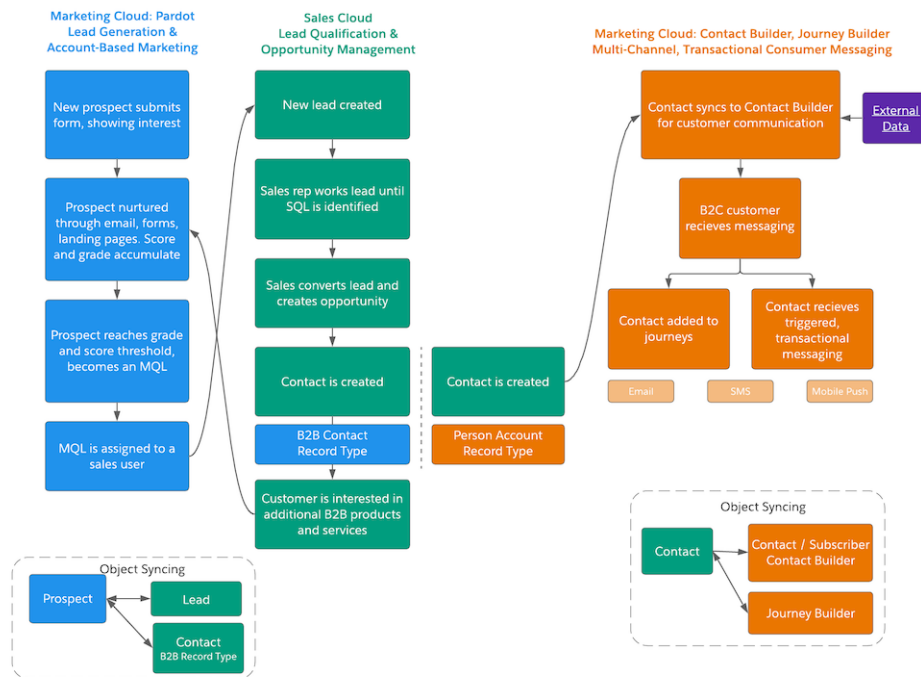


Configuration Details

1. A person with an email address that doesn't exist in Account Engagement or Salesforce submits an Account Engagement form. A prospect record is created.

2. The standalone prospect record is emailed from Account Engagement or an engagement program. The prospect continues to interact with other Account Engagement assets like forms and landing pages. Using the default scoring model and other automation features, the prospect's score and grade values adjust.
3. You set up an automation rule to find all unassigned prospects who meet a certain score and grade threshold. For example, you want to find all prospects with a score of at least 100 and a grade of at least B-. These prospects are considered a Marketing Qualified Lead (MQL).
4. The automation rule assigns these prospects to a sales user in Salesforce. Assignment can be via Salesforce lead assignment rules, queues, groups, or individual users.
5. The assignment automation triggers Salesforce to create a lead. The lead has a bidirectional syncing relationship with the corresponding prospect record in Account Engagement.
6. A sales rep qualifies the lead.
7. A sales rep determines that there's a potential opportunity with this lead, making it a Sales Qualified Lead (SQL). The sales rep converts the lead to a contact, creates an account, and creates an opportunity.
8. The lead is converted to a contact. This contact still has a bidirectional syncing relationship with the prospect. However, the contact is messaged only through Journey Builder. An automation rule is triggered in Account Engagement to set all prospects that are syncing with contacts in Salesforce as Don't Email. Account Engagement can't message these prospects.
9. The contact becomes available in Contact Builder via Marketing Cloud Connect in synchronized data extensions. Any other custom object that is needed for segmentation, personalization, or journey routing can also be synced from Sales Cloud, Service Cloud, or Consumer Goods Cloud to Marketing Cloud Contact Builder.
10. After the opportunity is closed won and the contact is officially a customer, customer marketing begins in Journey Builder. Use Contact Builder and other segmentation tools to add the customer to multi-channel journeys, bulk email sends, or triggered messaging based on their consumer behaviors and interests.
11. (OPTIONAL) Journey Builder has more features to interact with Sales Cloud or an industry cloud such as Consumer Goods Cloud directly. Journey Builder entry sources listen for changes in Sales Cloud, such as a contact added to a campaign, and add them to a journey. Sales, Service Cloud, and Consumer Goods Cloud canvas activities in Journey Builder. They can be used to create or update Sales, Service, and Consumer Goods Cloud object records for connected Marketing Cloud contacts. Although Journey Builder canvas activities provide a data connection to Sales Cloud and Consumer Goods Cloud, they're intended for specific campaign actions like creating a task or updating a person account. Don't use Journey Builder as a large-scale bulk data transformation tool to bulk update Sales Cloud and Consumer Goods Cloud objects.

Scenario 2: Two Contact Record Types



Configuration Steps

B2B Persona

1. A person with an email address that doesn't exist in Account Engagement or Salesforce submits an Account Engagement form. A new prospect record is created.
2. The standalone prospect record is emailed from Account Engagement or an engagement program. The prospect continues to interact with other Account Engagement assets like forms and landing pages. Using the default scoring model and other automation features, the prospect's score and grade values adjust.
3. You set up an automation rule to find all unassigned prospects who meet a certain score and grade threshold. For example, find all prospects with a score of at least 100 and a grade of at least B-. These prospects are considered a Marketing Qualified Lead (MQL)
4. The automation rule assigns these prospects to a sales user in Sales Cloud or an industry cloud such as Consumer Goods Cloud. Assignment can be via lead assignment rules, queues, groups, or individual users.
5. The assignment automation triggers Sales Cloud or an industry cloud such as Consumer Goods Cloud to create a lead. The lead has a bidirectional syncing relationship with the corresponding prospect record.
6. A sales rep qualifies the lead.
7. A sales rep determines that there's a potential opportunity with this lead, making it a Sales Qualified Lead (SQL). The sales rep converts the lead to a contact, creates an account, and creates an opportunity.
8. The lead is converted to a contact. The contact is created with a specific record type: B2B Contact. Marketing Data Sharing rules in Account Engagement are configured to ensure that only those contacts with the B2B record type sync with Account Engagement. The prospect in Account Engagement has a bidirectional syncing relationship with the contact in Sales Cloud or an industry cloud such as Consumer Goods Cloud.
9. The existing customer, still syncing to Account Engagement, expresses interest in another product or service. The B2B marketing team continues marketing to this customer using features in Account Engagement like email nurturing, scoring, grading, and sales team alignment. Another opportunity can be created on the existing contact record.

B2C Persona

1. A buyer makes a purchase and becomes a customer. A salesperson isn't involved in this transaction.
2. As a new customer, a contact is created as a person account record in Sales Cloud or Consumer Goods Cloud.
3. The person account is available in Contact Builder using the contact ID via Marketing Cloud Connect using synchronized data extensions. In addition to the contact object, any custom object needed for segmentation, personalization, or journey routing can be synced from Sales Cloud, Service Cloud, or Consumer Goods Cloud to Contact Builder.
4. After the initial purchase, customer marketing begins in Journey Builder. Use Contact Builder and other segmentation tools to add the customer to multi-channel journeys, bulk email sends, or triggered messaging based on their consumer behaviors and interests.
5. (OPTIONAL) Journey Builder has more features to interact with Sales Cloud and Consumer Goods Cloud directly. Journey Builder entry sources listen for changes in Sales Cloud and Consumer Goods Cloud, such as a contact added to a campaign, and add them to a journey. Sales, Service, and Consumer Goods Cloud canvas activities in Journey Builder can be used to create or update object records for connected Marketing Cloud contacts. Although Journey Builder canvas activities provide a data connection to Sales Cloud and Consumer Goods Cloud, they're intended for specific campaign actions like creating a task or updating a person account. Don't use Journey Builder as a large-scale bulk data transformation tool to bulk update Sales Cloud objects.

Related Content



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